



Cisco Systems - SMB Research Media Presentation- Key Findings

Europe, Autumn 2005



Methodology

- **Fieldwork and analysis undertaken by Coleman Parkes**

UK-based market research house with extensive experience in SMB sector

www.coleman-parkes.co.uk/home.asp

- **All data gathered during September 2005**

Target SMBs restricted to companies with 20 – 249 employees

Detailed questionnaire with both prompted and unprompted questions

All interviewees pre-qualified at start of call to ensure that they were an ICT decision-maker

Interviewees typically owner-managers of SMBs

Background

- **1204 interviews in Europe, at least 100 in each country**

UK

France

Germany

Italy

Spain

Netherlands

Denmark

Sweden

Finland

Poland

Czech Republic

Hungary

- **Cross-section of size and sectors**

See next slide . . .

Background

- **Interviews split by size of SMB**

SMB Size	Number of Interviews
20 – 49	411
50 - 99	391
100 -249	402

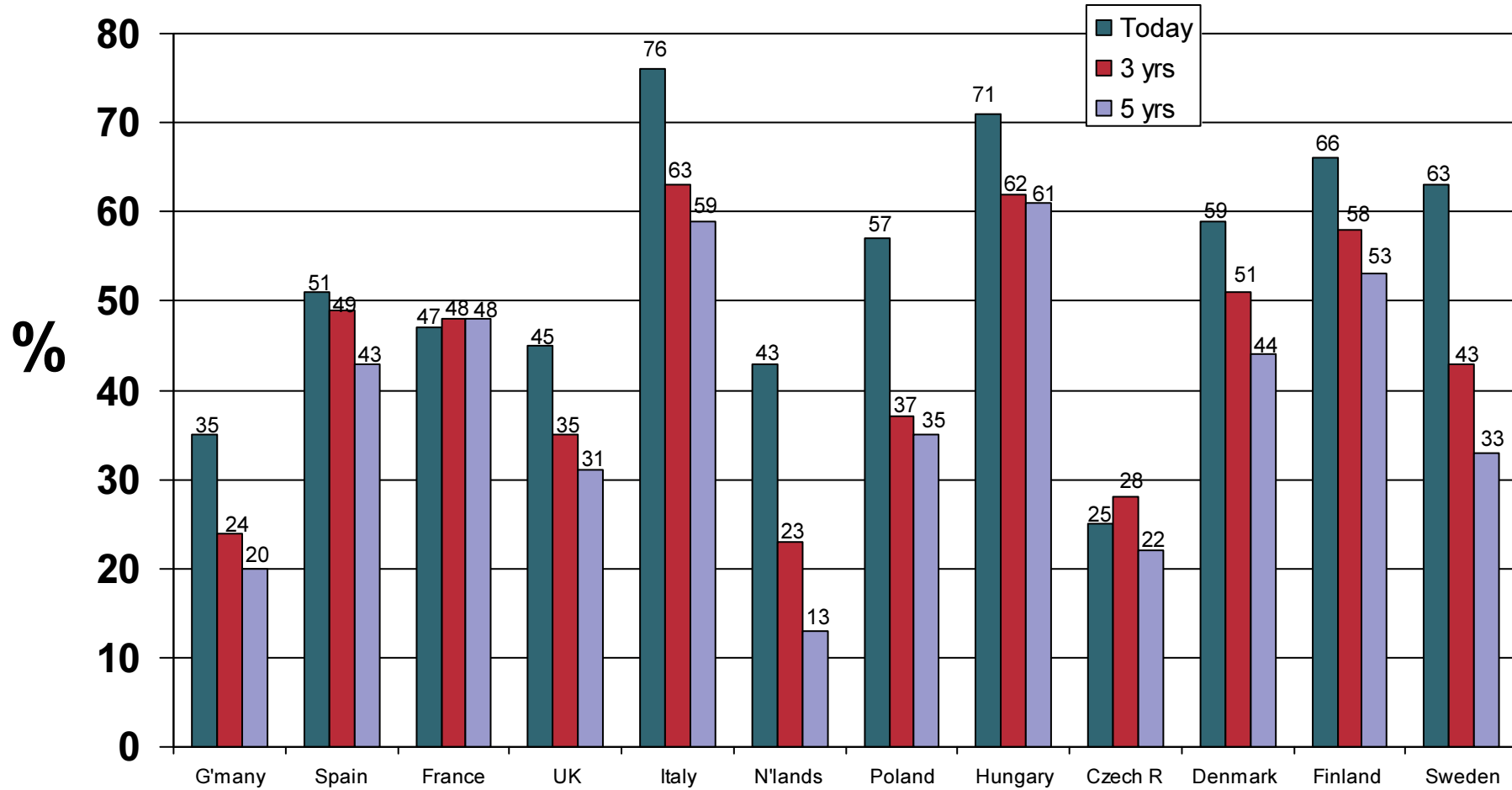
- **Interviews split by Industry**

Industry	Number of Interviews
Business Services	169
Manufacturing	438
Retail/Wholesale	202
Finance	31
Utilities & Telecommunications	61
Other	303

Top Business Challenges Faced: Next 5 Yrs – By Country

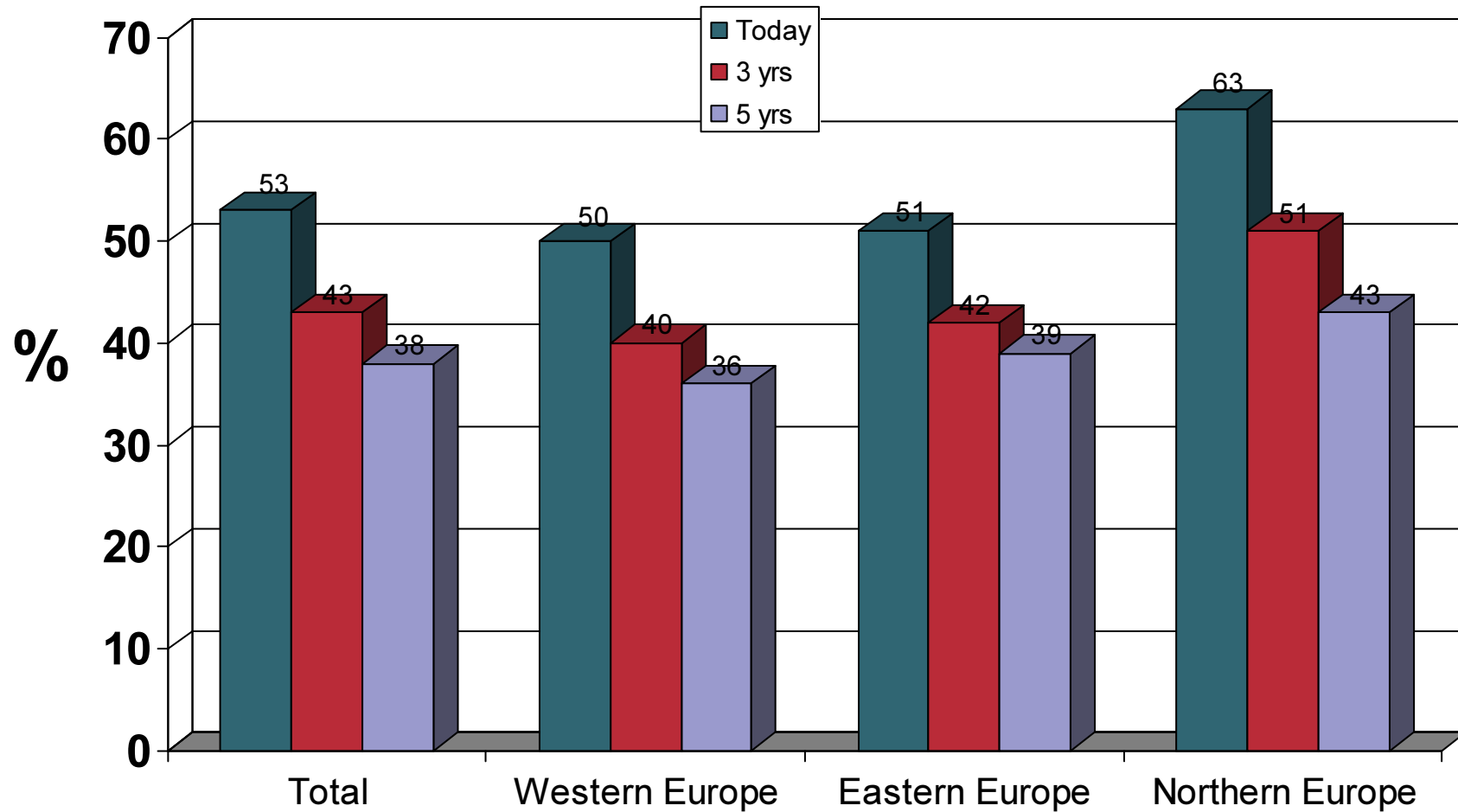
Competition

Base = All



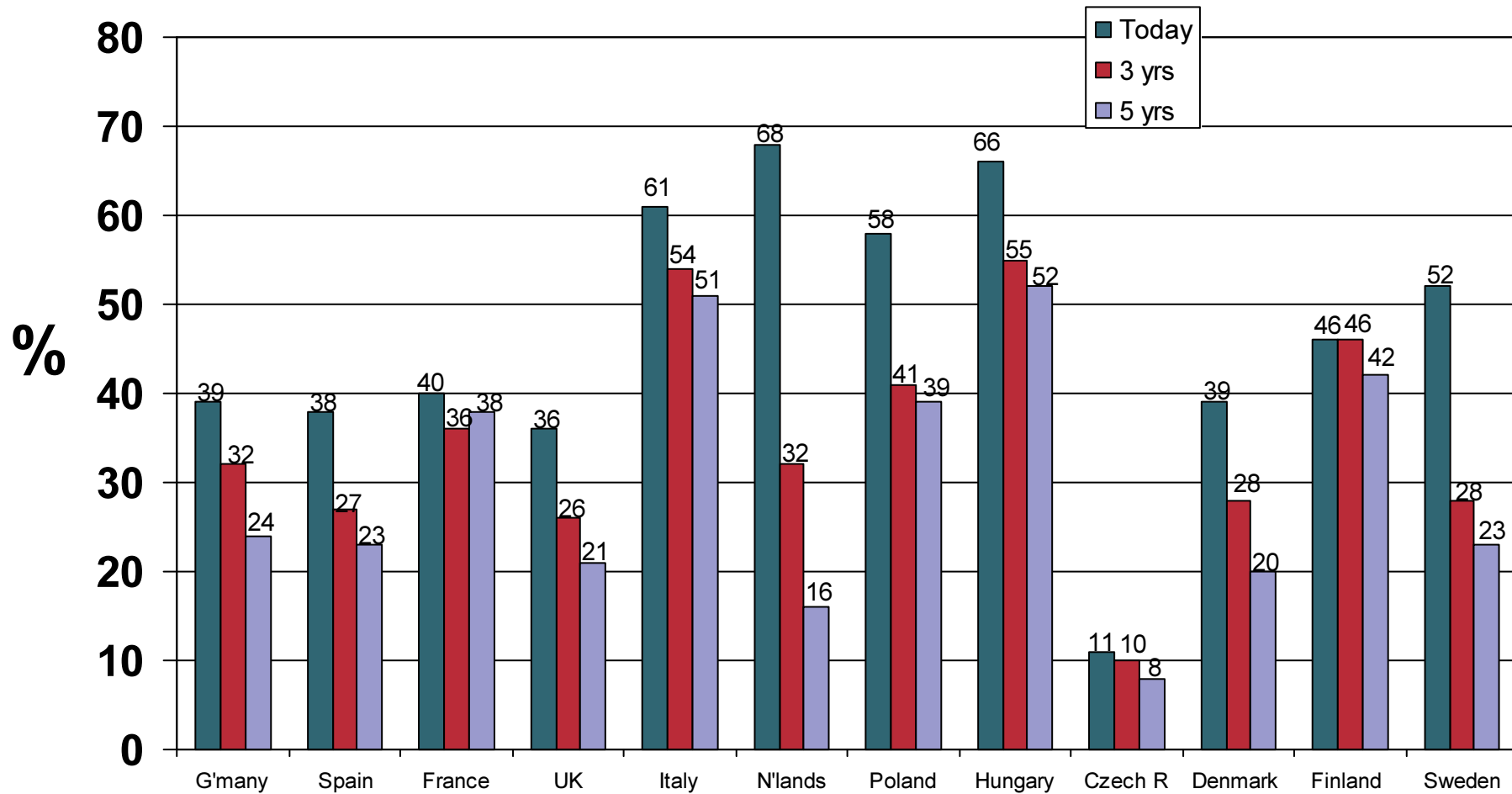
Top Business Challenges Faced: Next 5 Yrs – By Region

Competition
Base = All



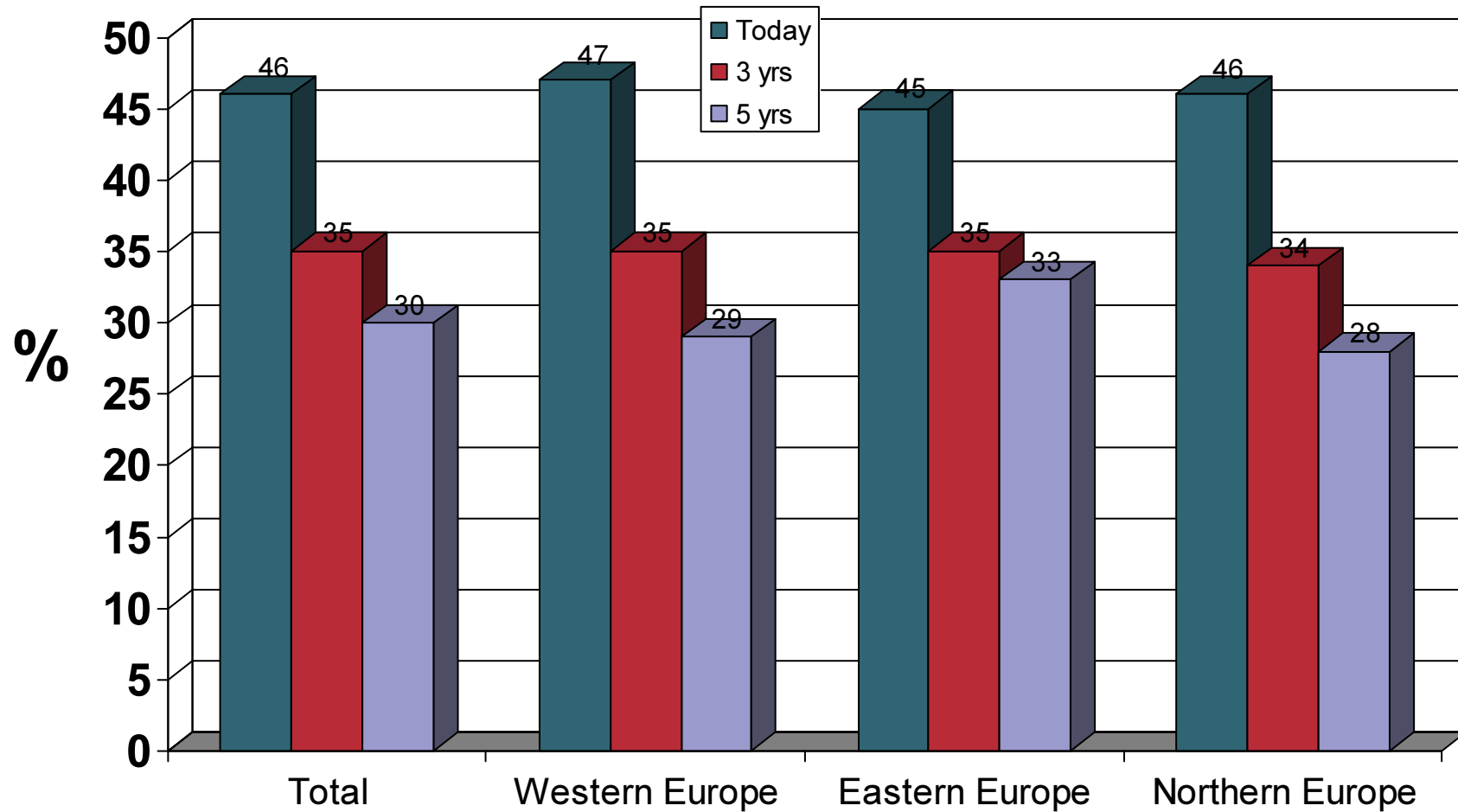
Top Business Challenges Faced: Next 5 Yrs – By Country

Keeping Up-to-date with Market Issues and Developments Base = All



Top Business Challenges Faced: Next 5 Yrs – By Region

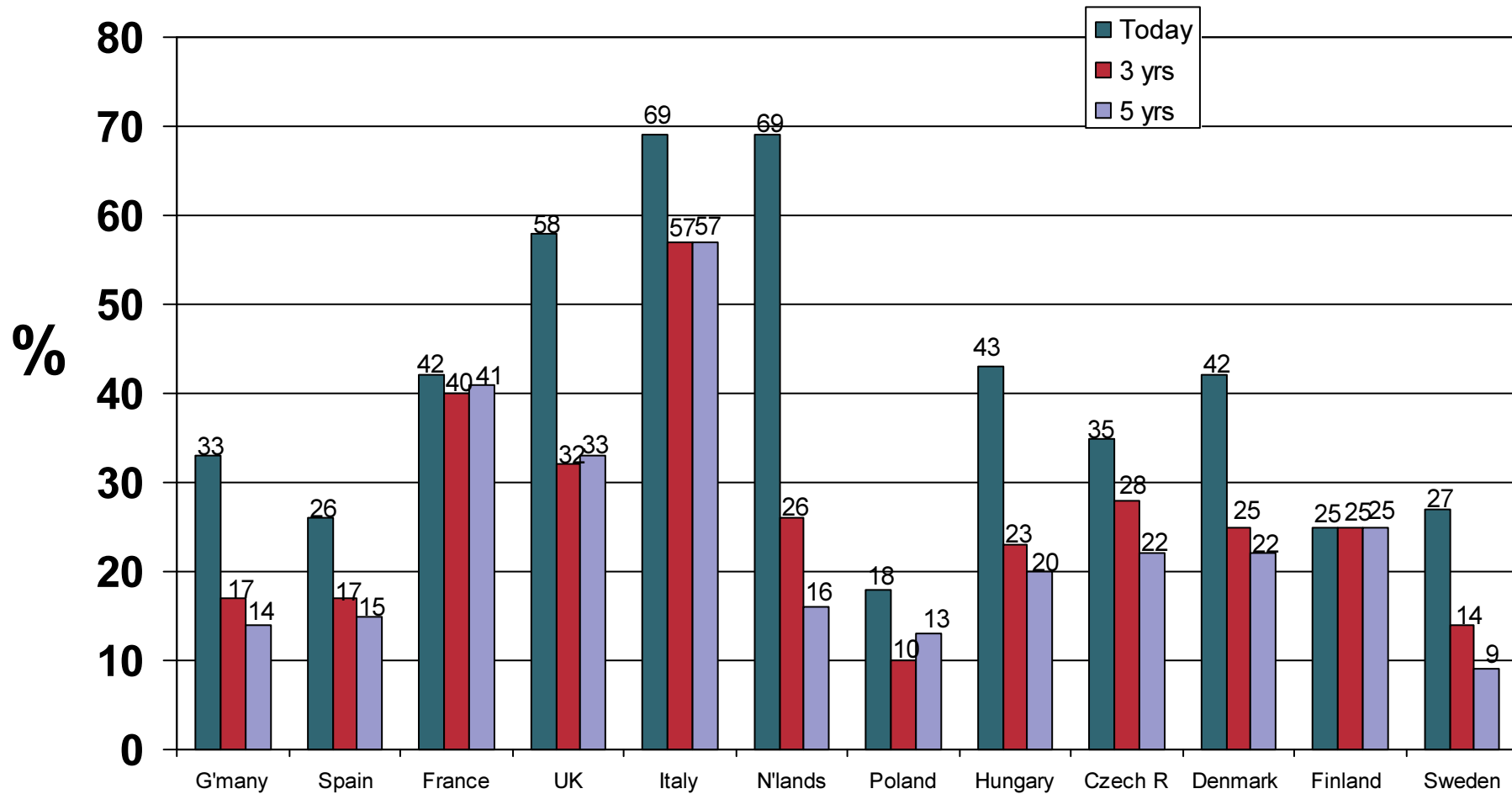
Keeping Up-to-date with Market Issues and Developments Base = All



Top Business Challenges Faced: Next 5 Yrs – By Country

Meeting Legislation and Regulation

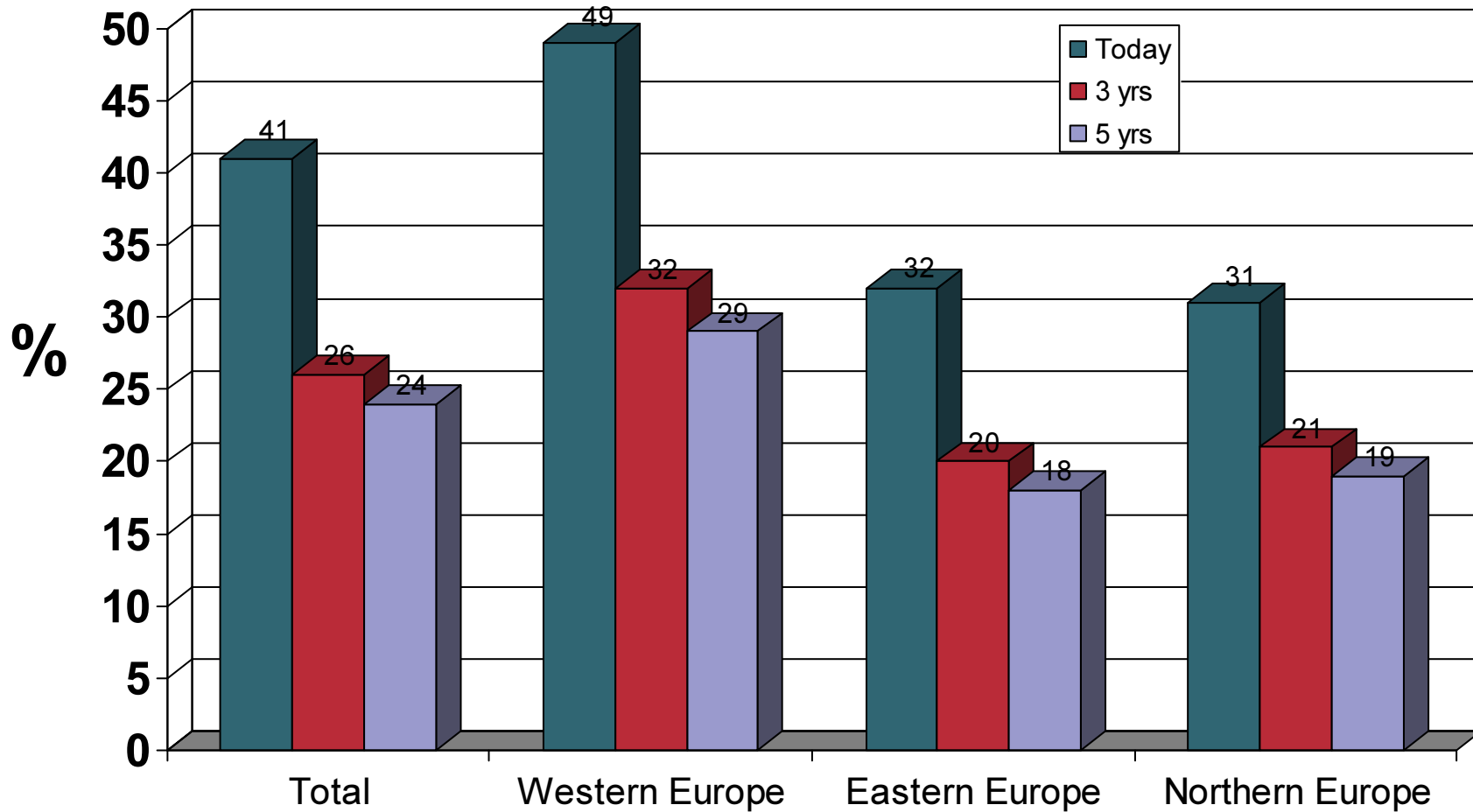
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Top Business Challenges Faced: Next 5 Yrs – By Region

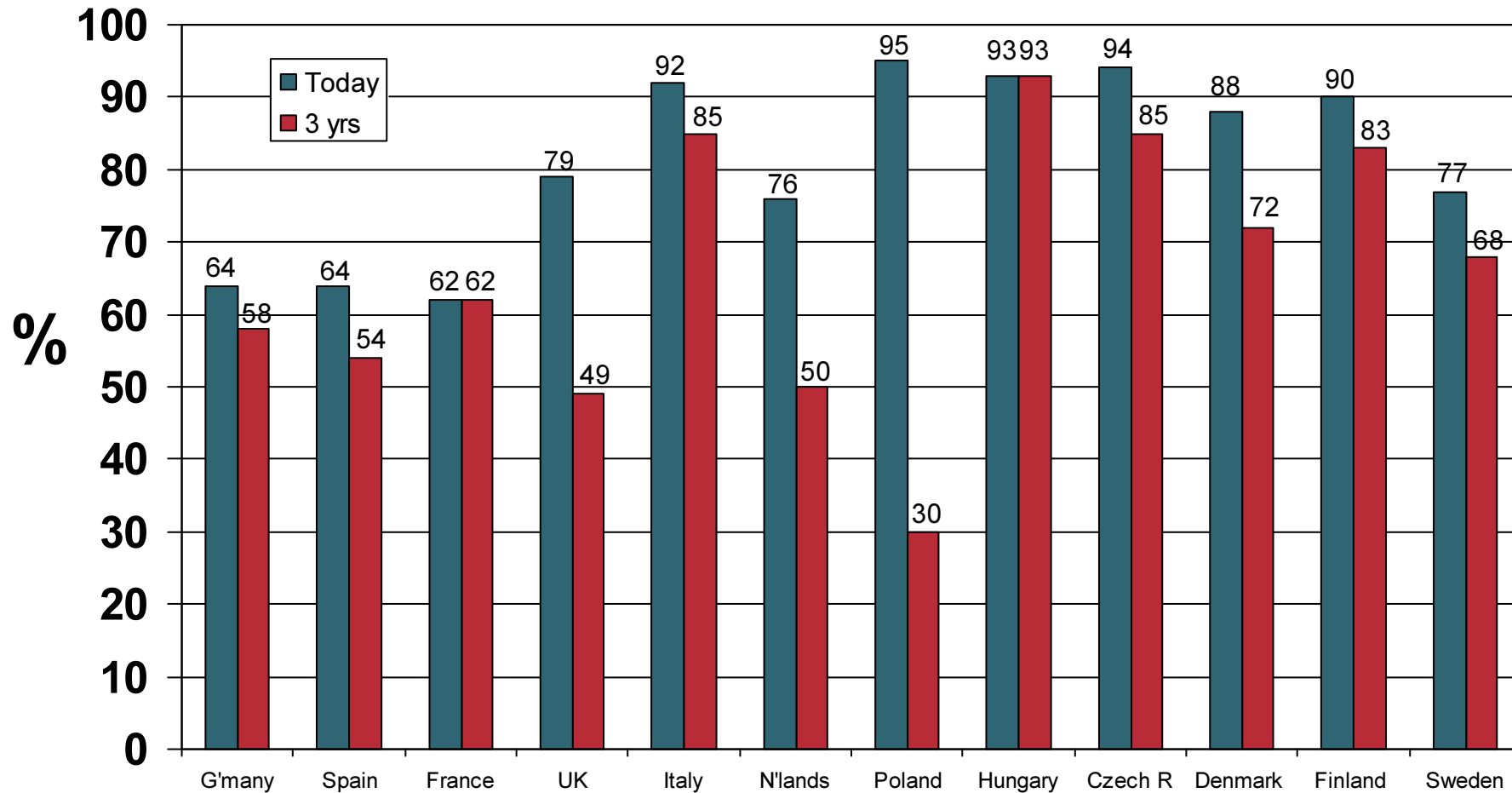
Meeting Legislation and Regulation

Base = All



“Must Have” Technologies: Next 3 Yrs – By Country

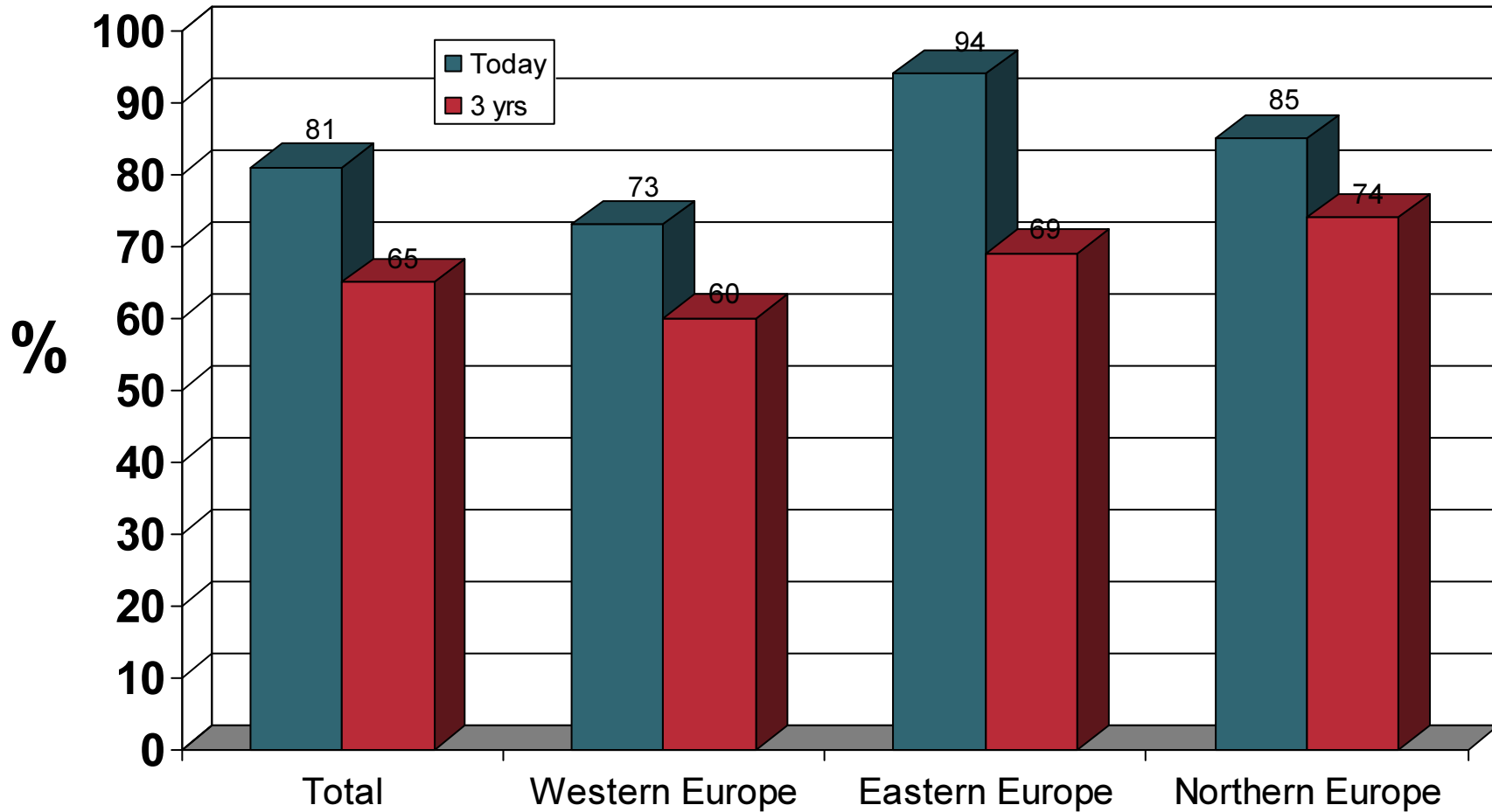
Fast Internet Connection/Broadband
Base = All



“Must Have” Technologies: Next 3 Yrs – By Region

Fast Internet Connection/Broadband

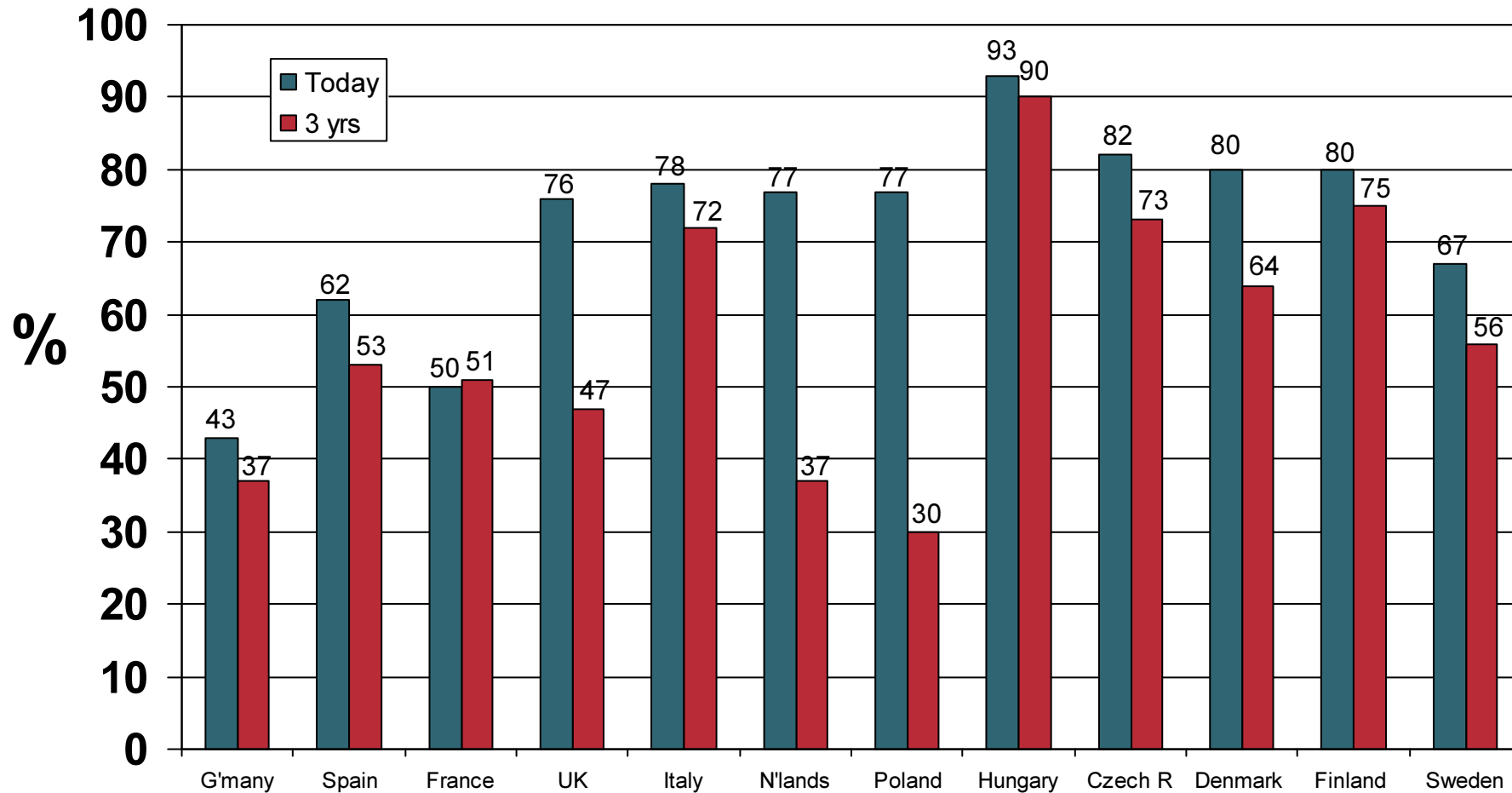
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“Must Have” Technologies: Next 3 Yrs – By Country

Networked PCs/Networked Laptops

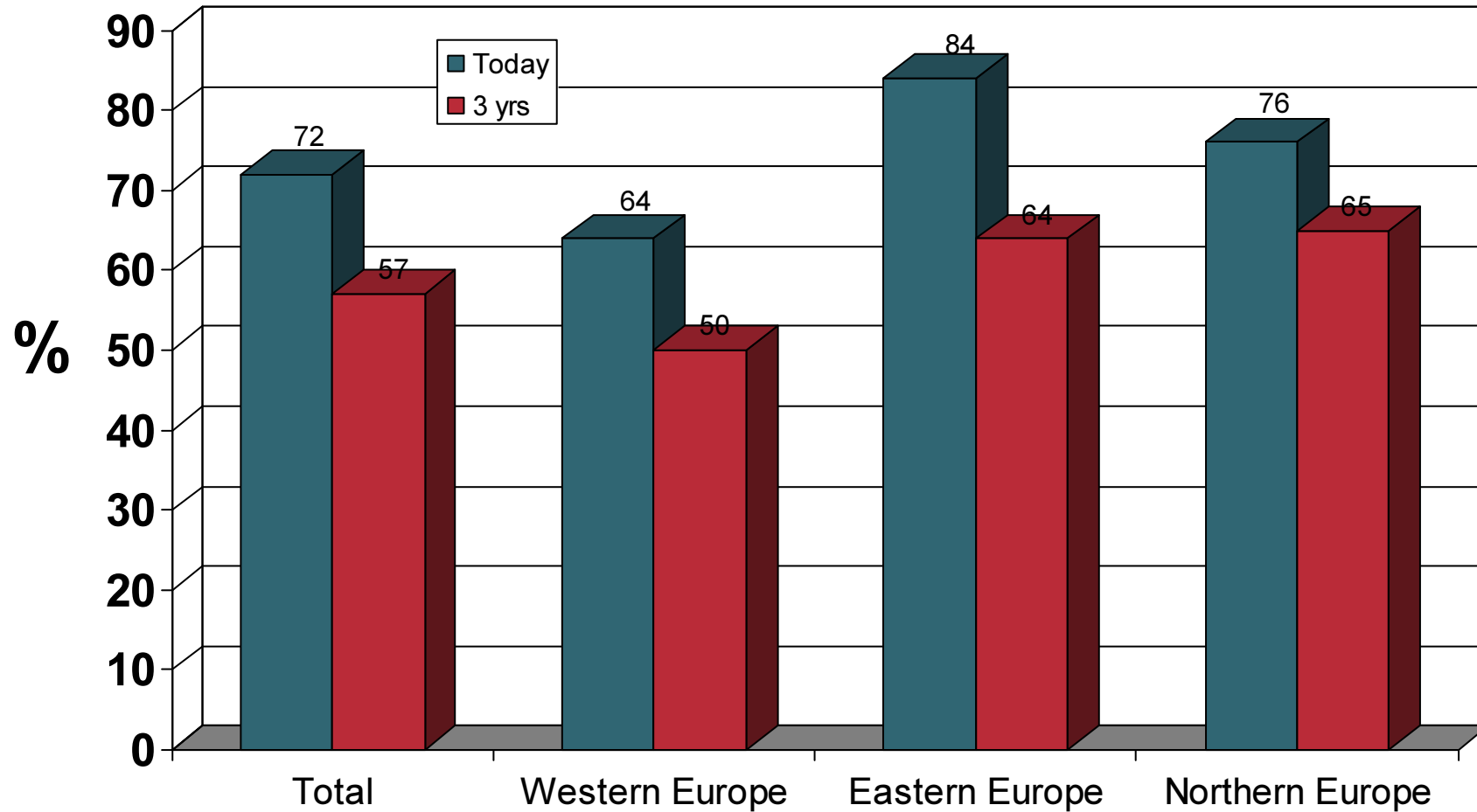
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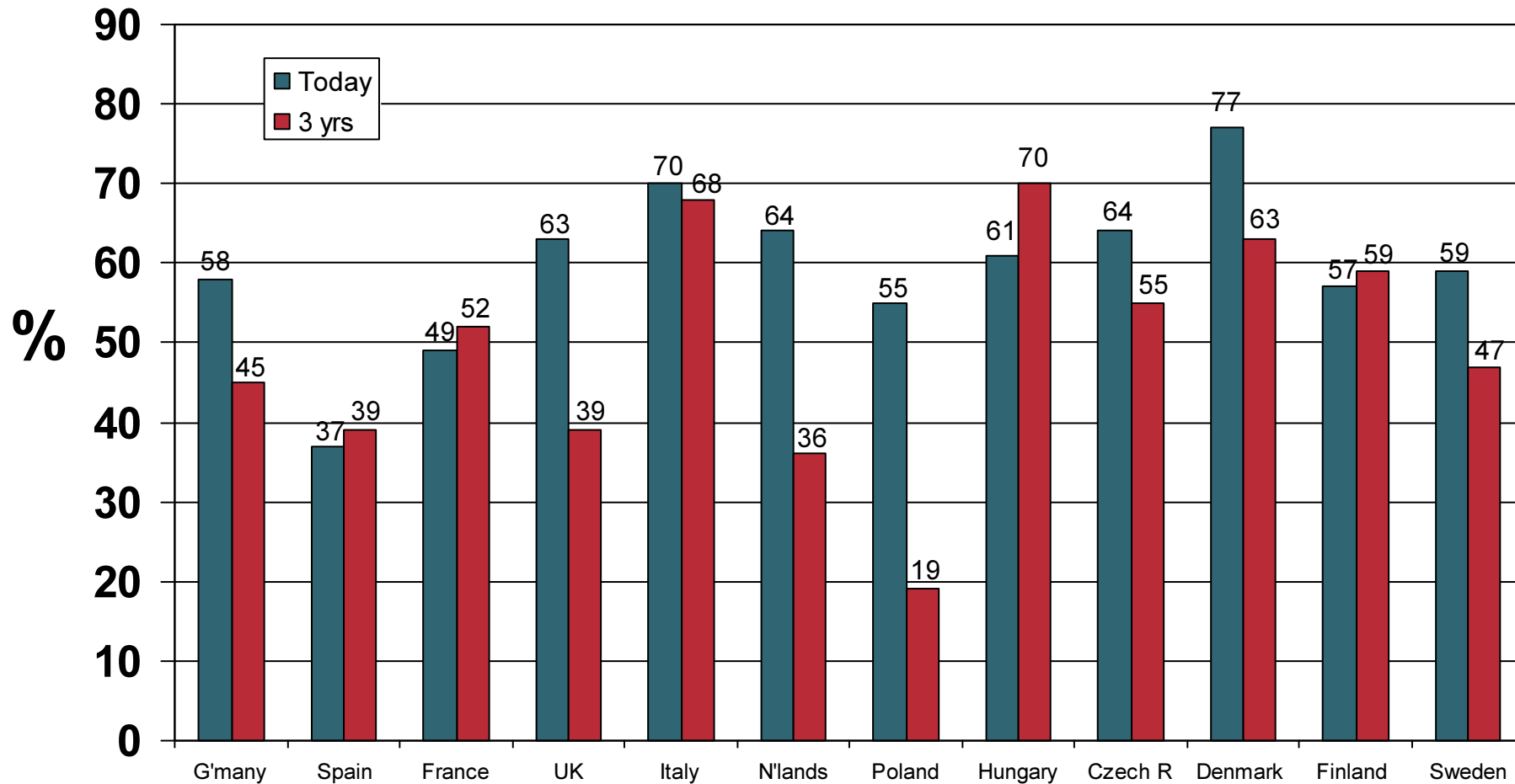
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“Must Have” Technologies: Next 3 Yrs – By Country

Remote Access Network

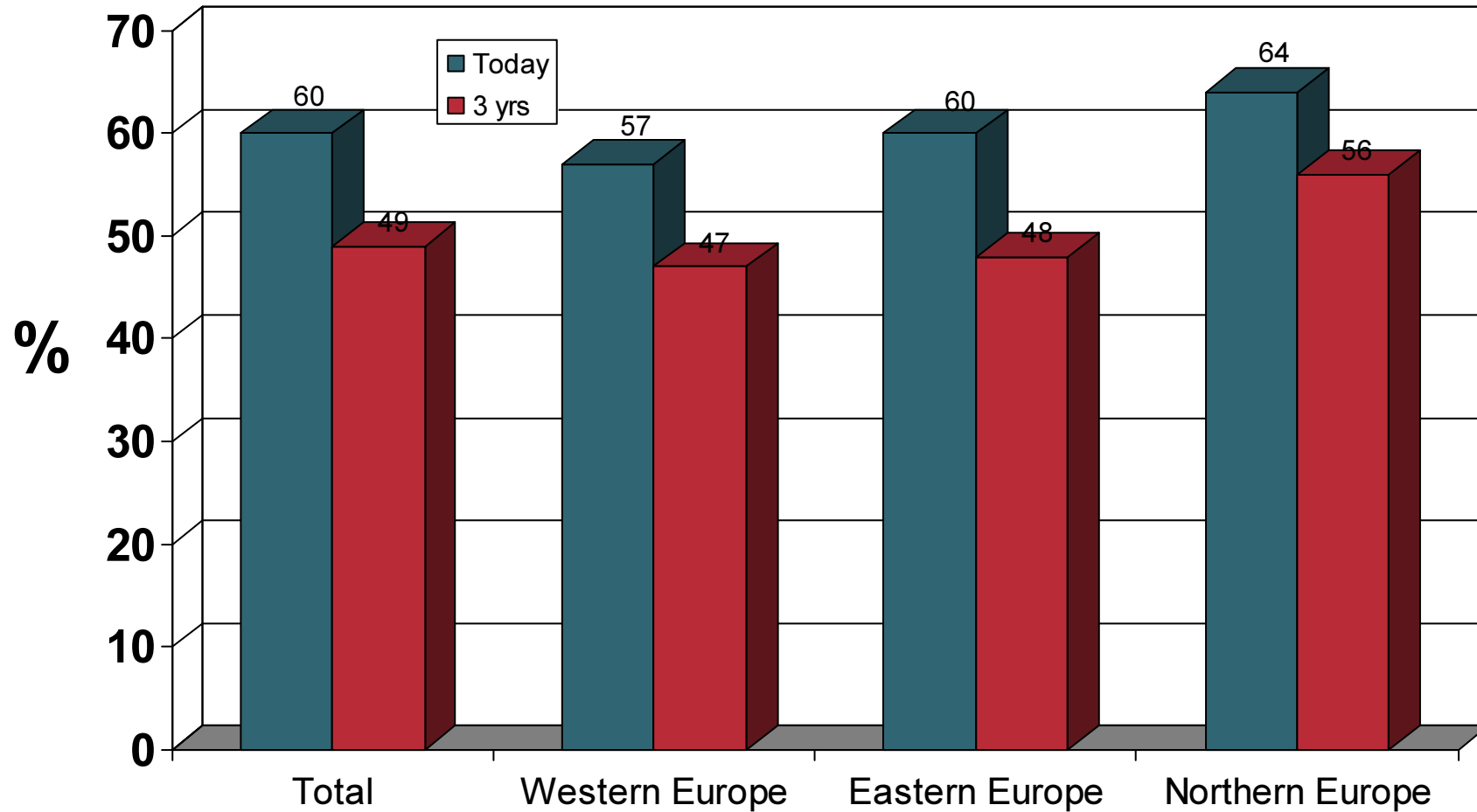
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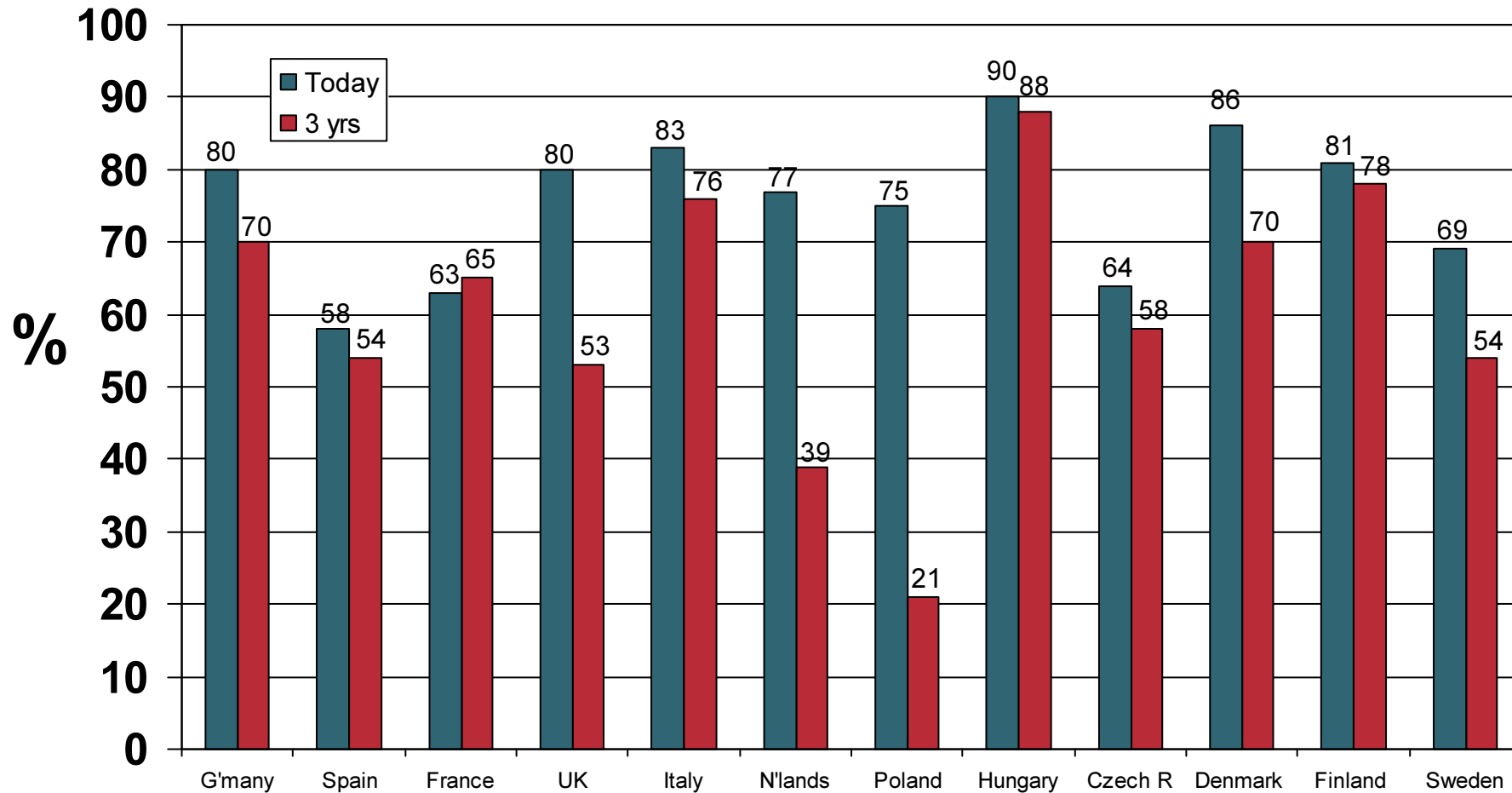
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“Must Have” Technologies: Next 3 Yrs – By Country

Secure Networking

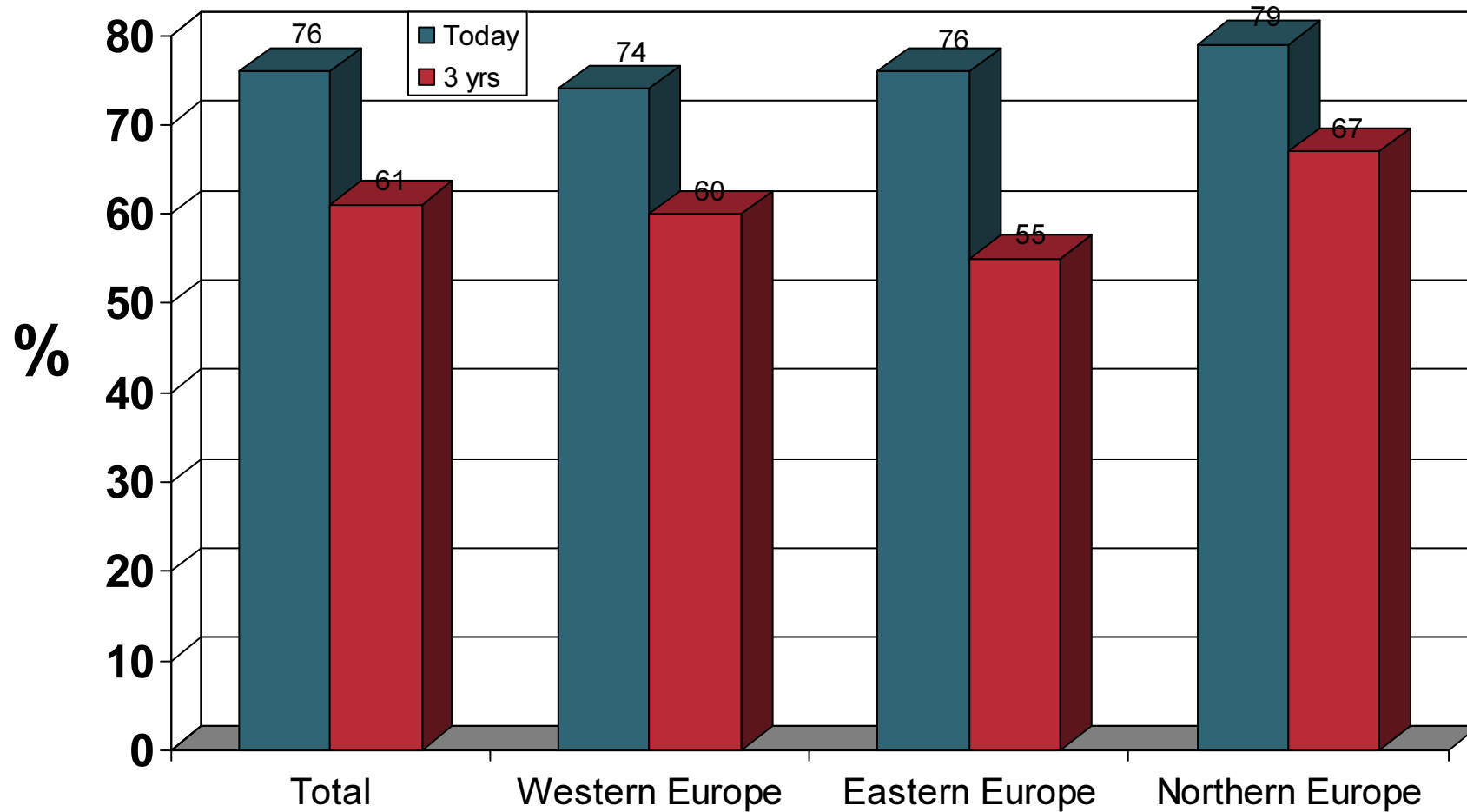
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“Must Have” Technologies: Next 3 Yrs – By Region

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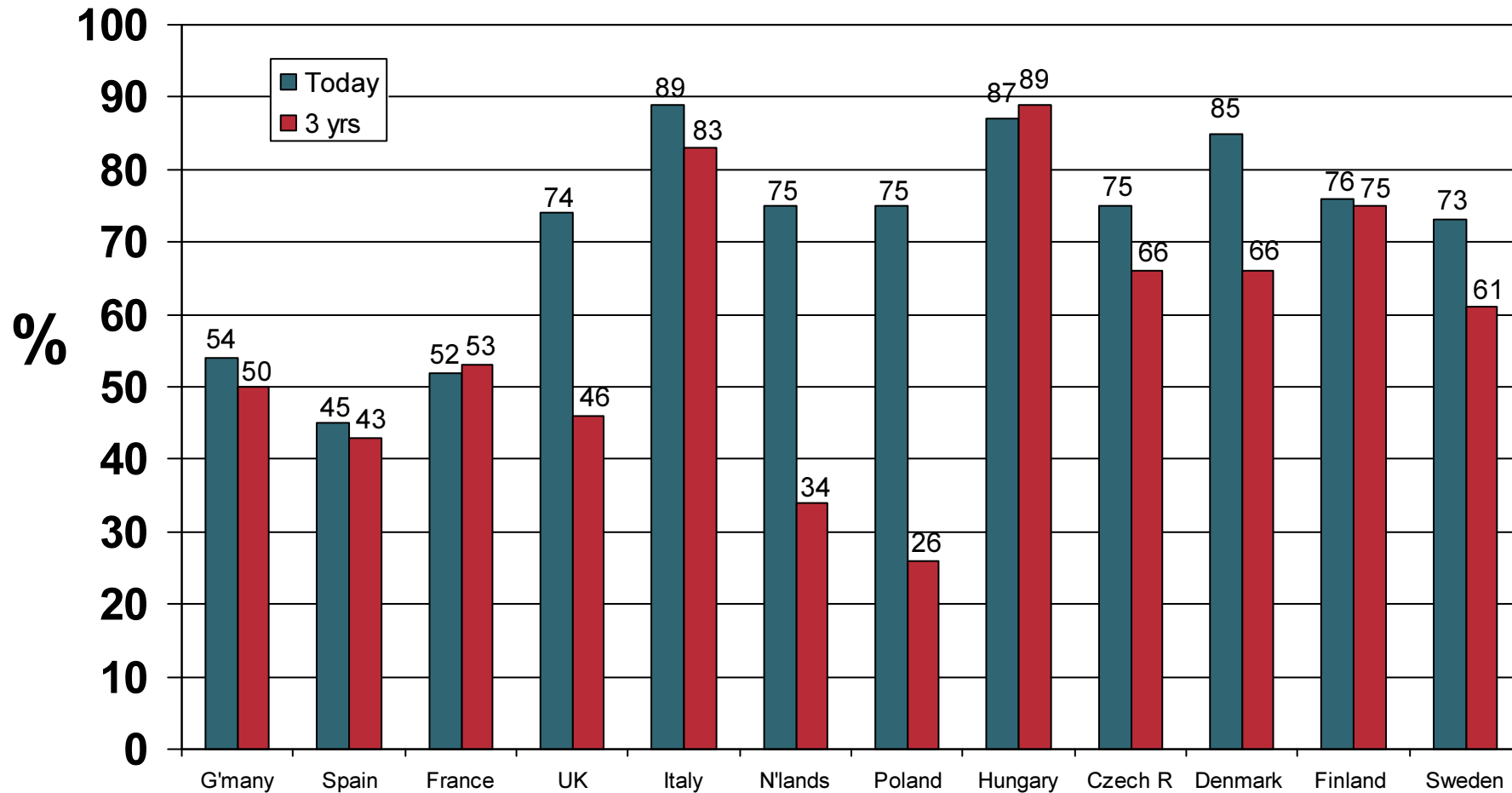
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“Must Have” Technologies: Next 3 Yrs – By Country

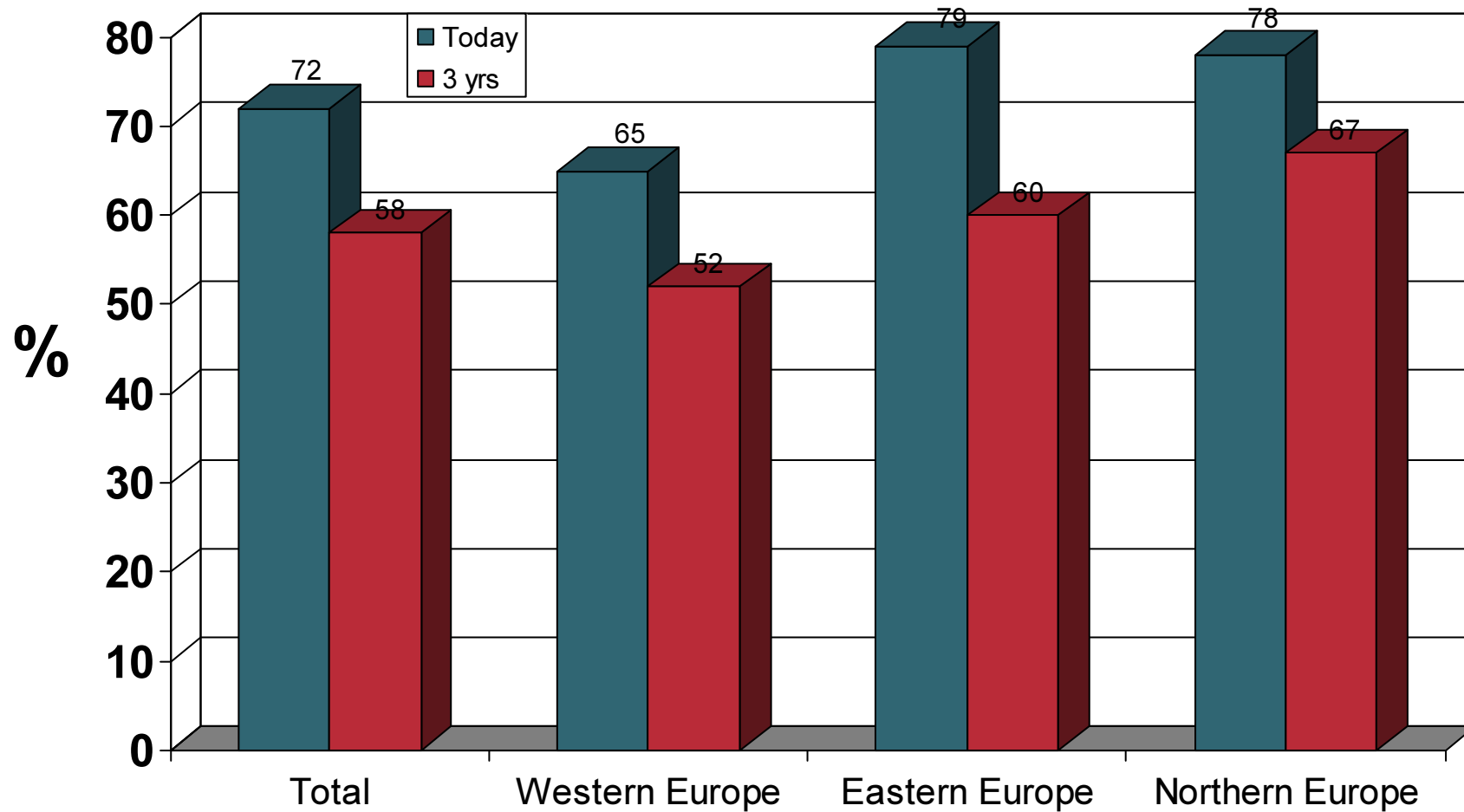
Storage/Back-up

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“Must Have” Technologies: Next 3 Yrs – By Region Storage/Back-up

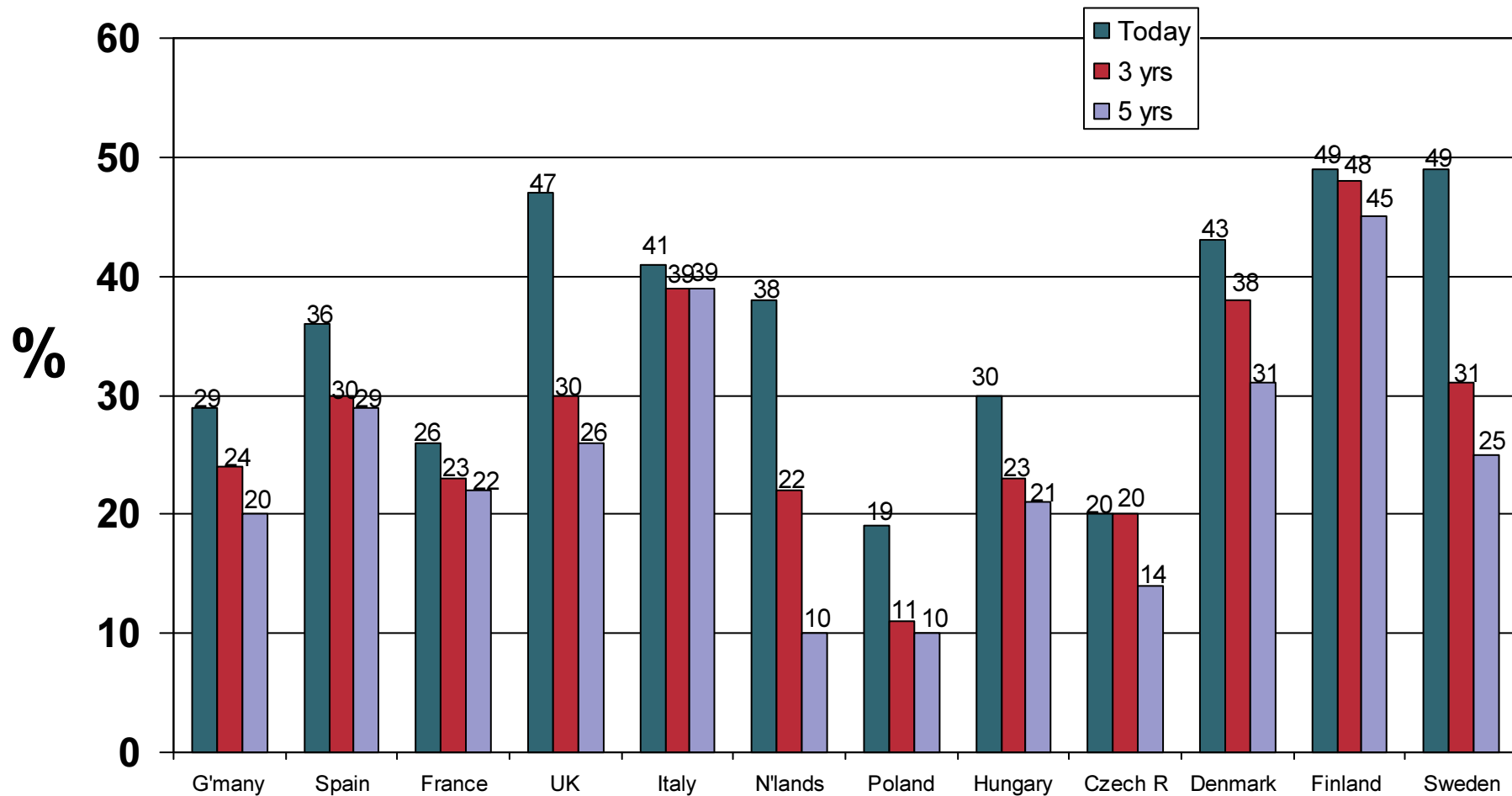
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Top Technical Barriers to Growth: Next 5 Yrs – By Country

Integrating New Technology into Existing Systems

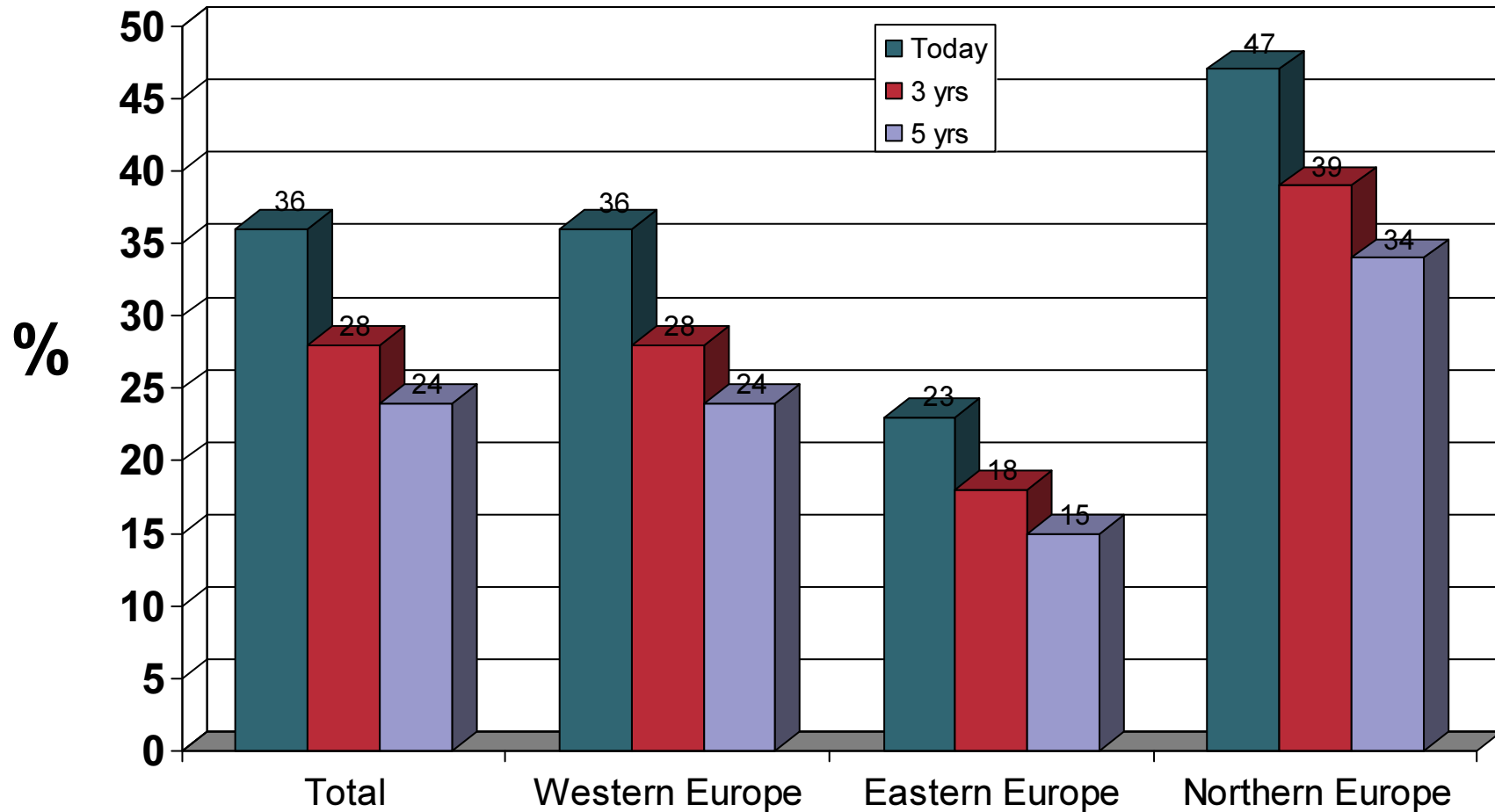
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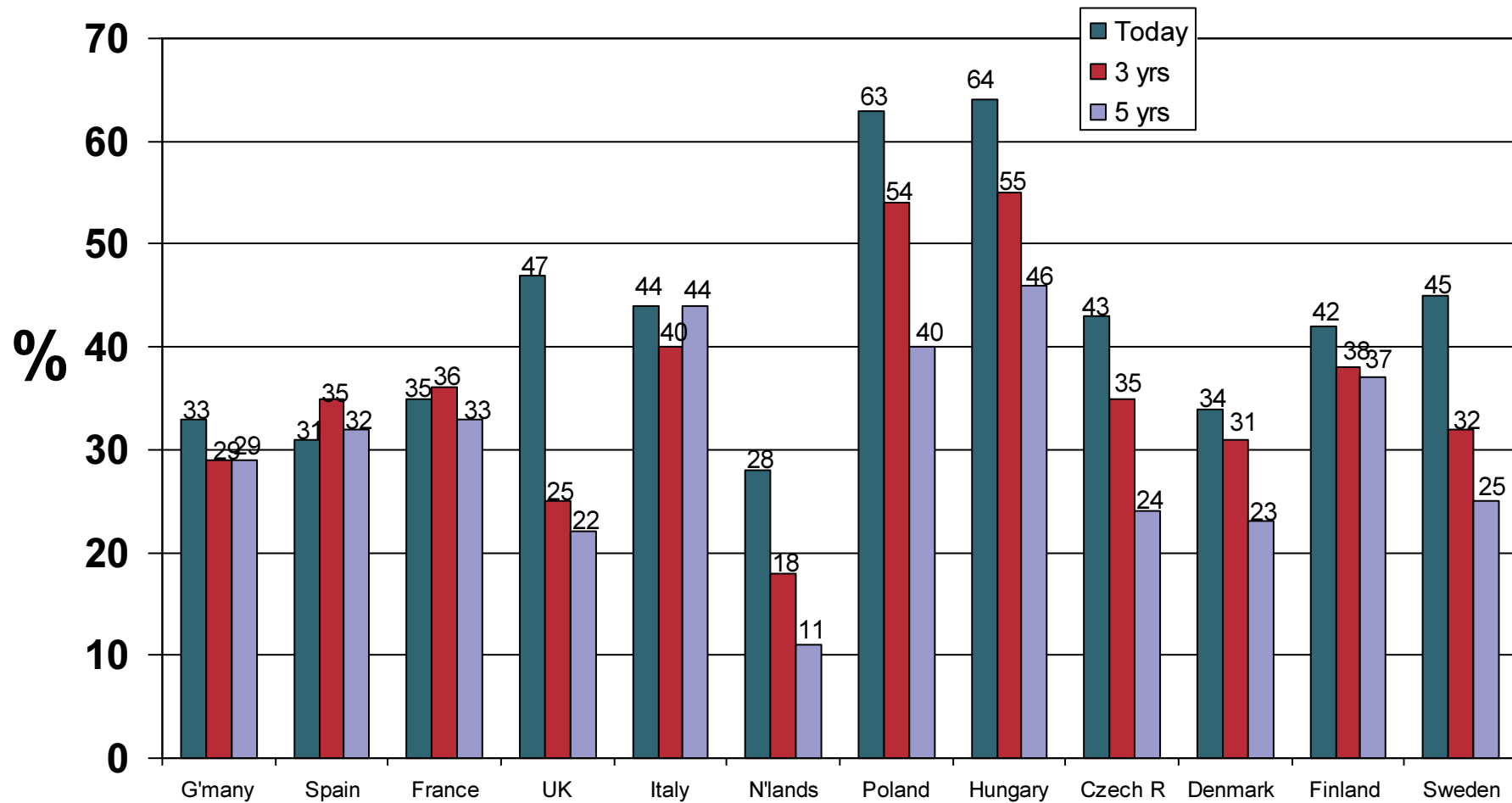
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Q3 Top Technical Barriers to Growth: Next 5 Yrs – By Country

The Cost of Technology

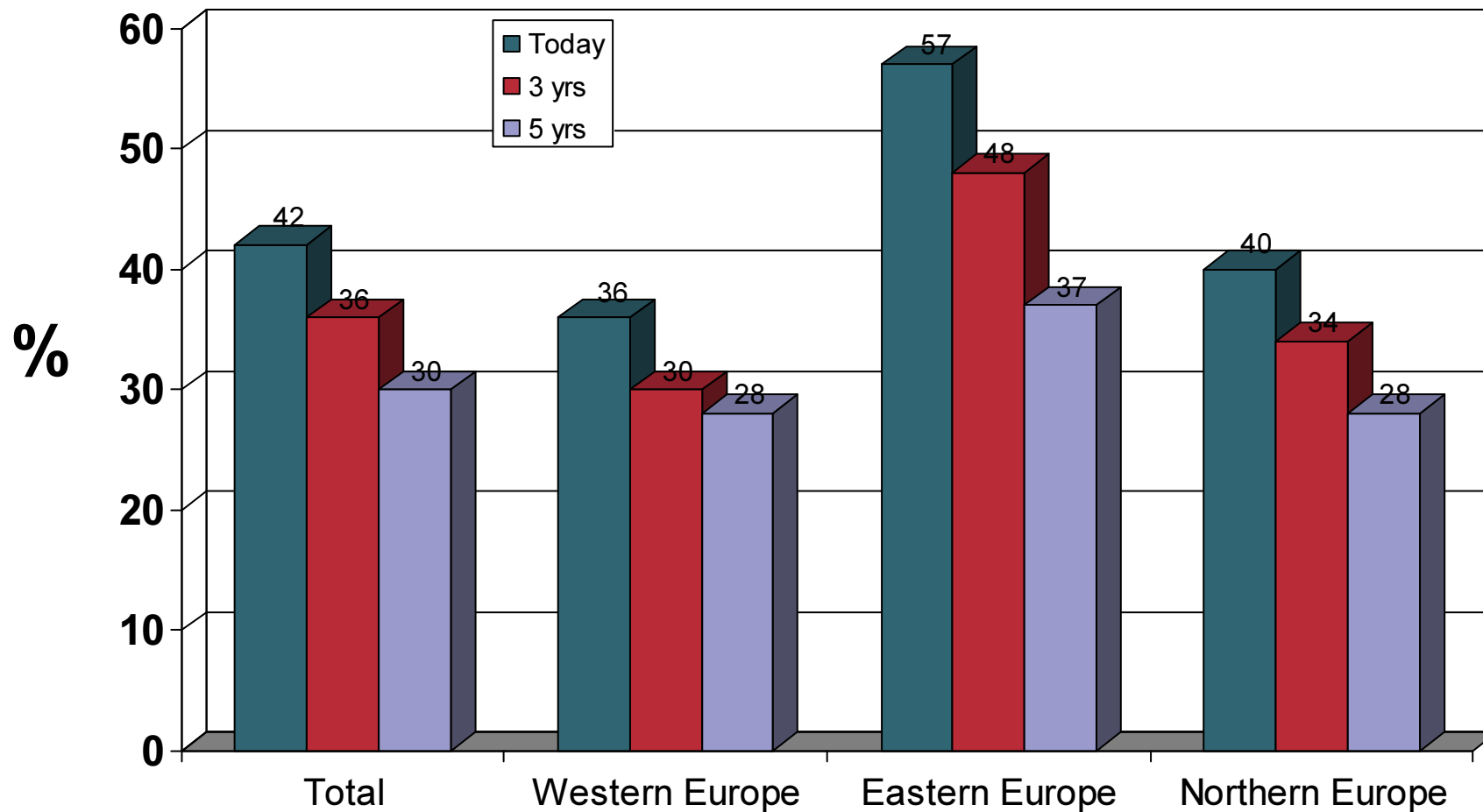
Base = All respondents



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The Cost of Technology

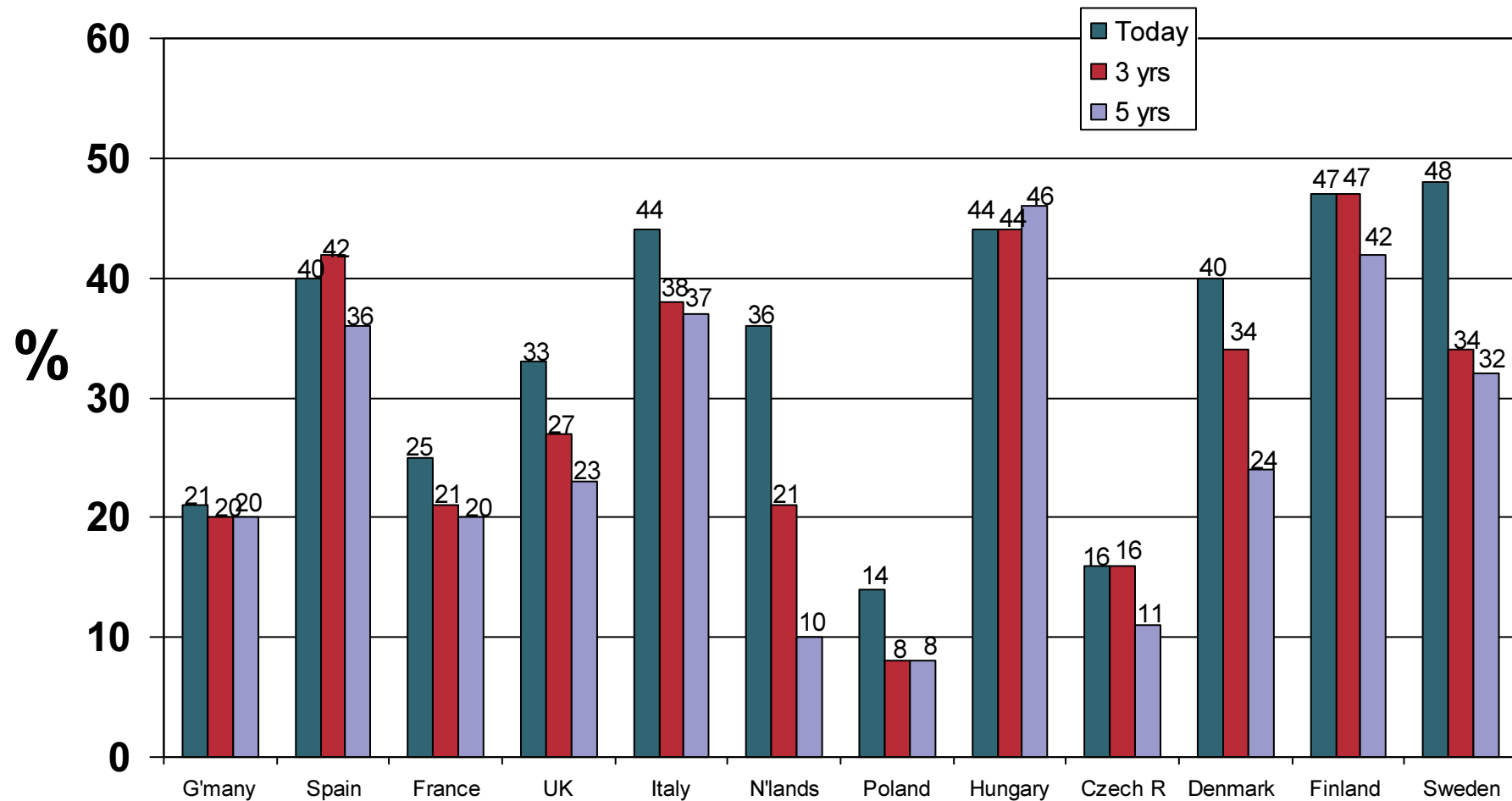
Base = All respondents



Q3 Top Technical Barriers to Growth: Next 5 Yrs – By Country

Pace of Change/Adapting to New Technology

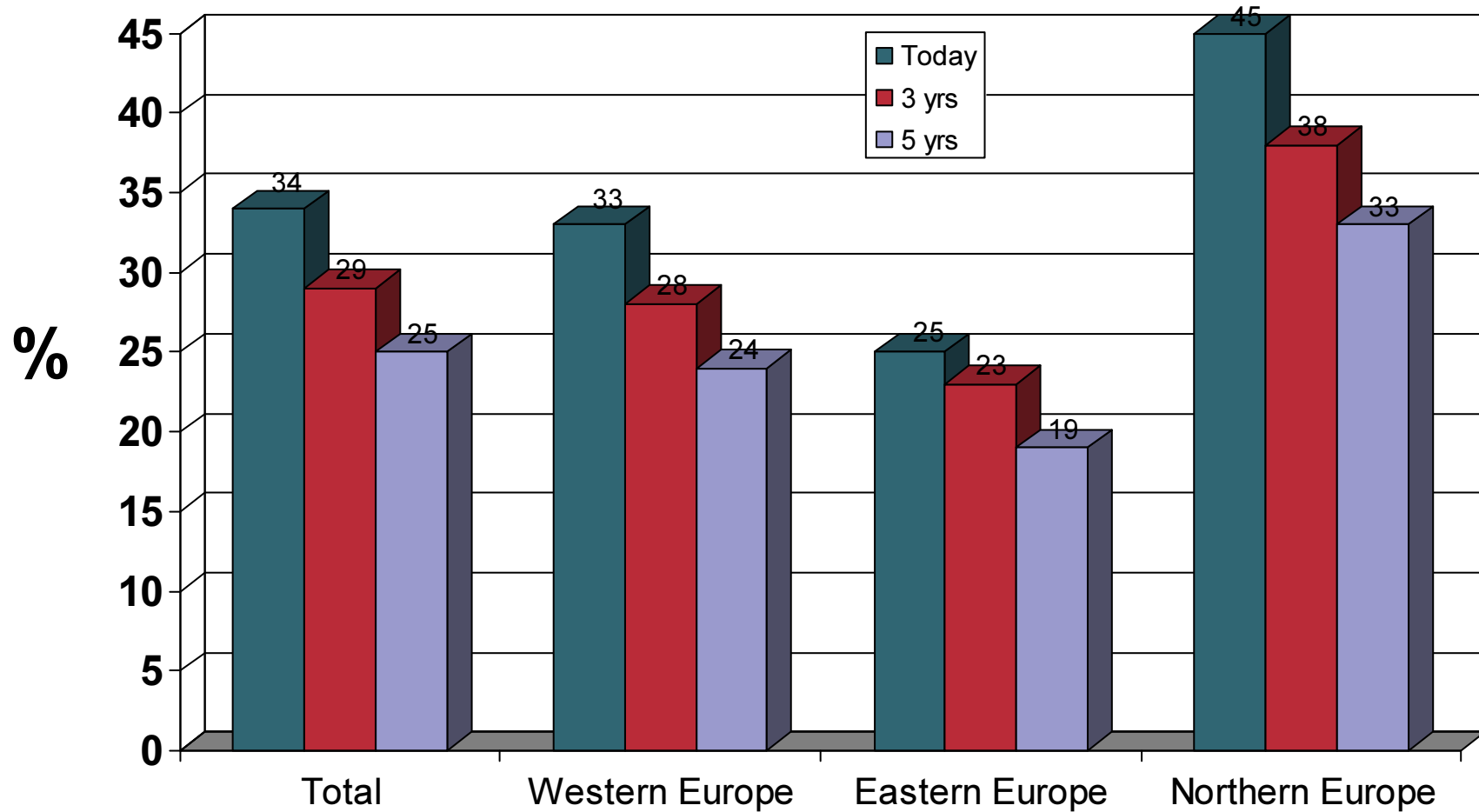
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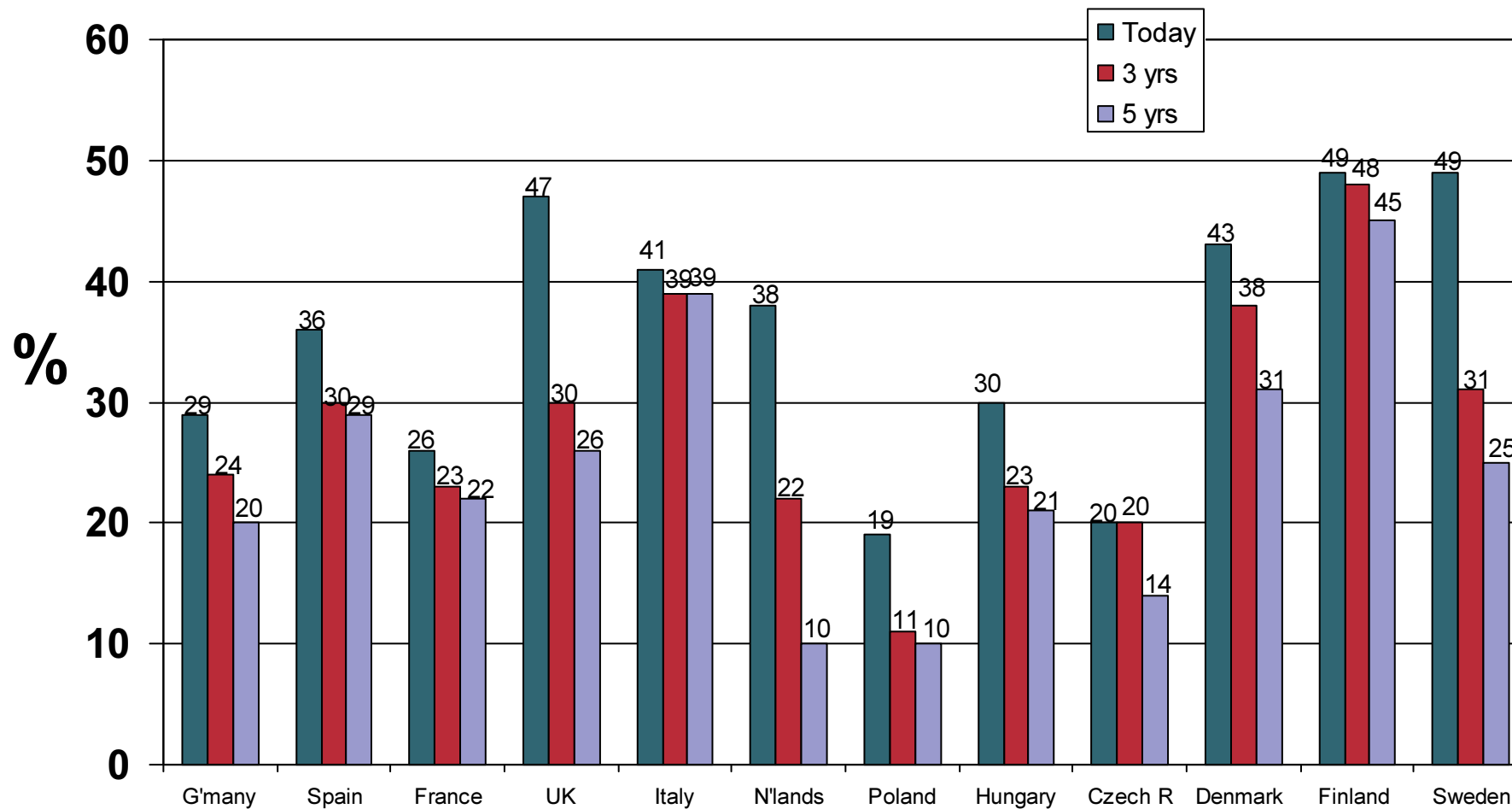
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Q3 Top Technical Barriers to Growth: Next 5 Yrs – By Country

Integrating New Technology into Existing Systems

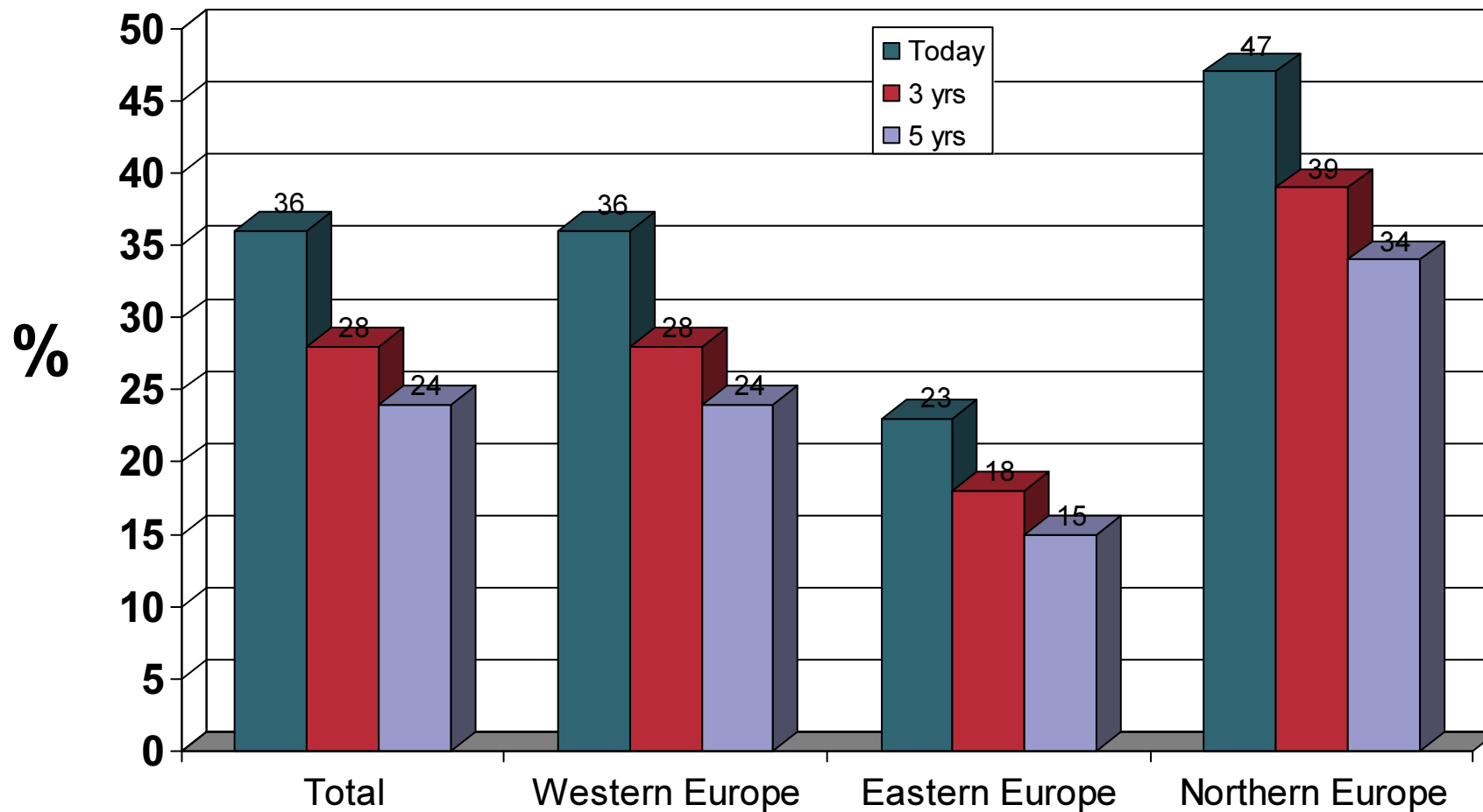
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Q3 Top Technical Barriers to Growth: Next 5 Yrs – By Region

Integrating New Technology into Existing Systems

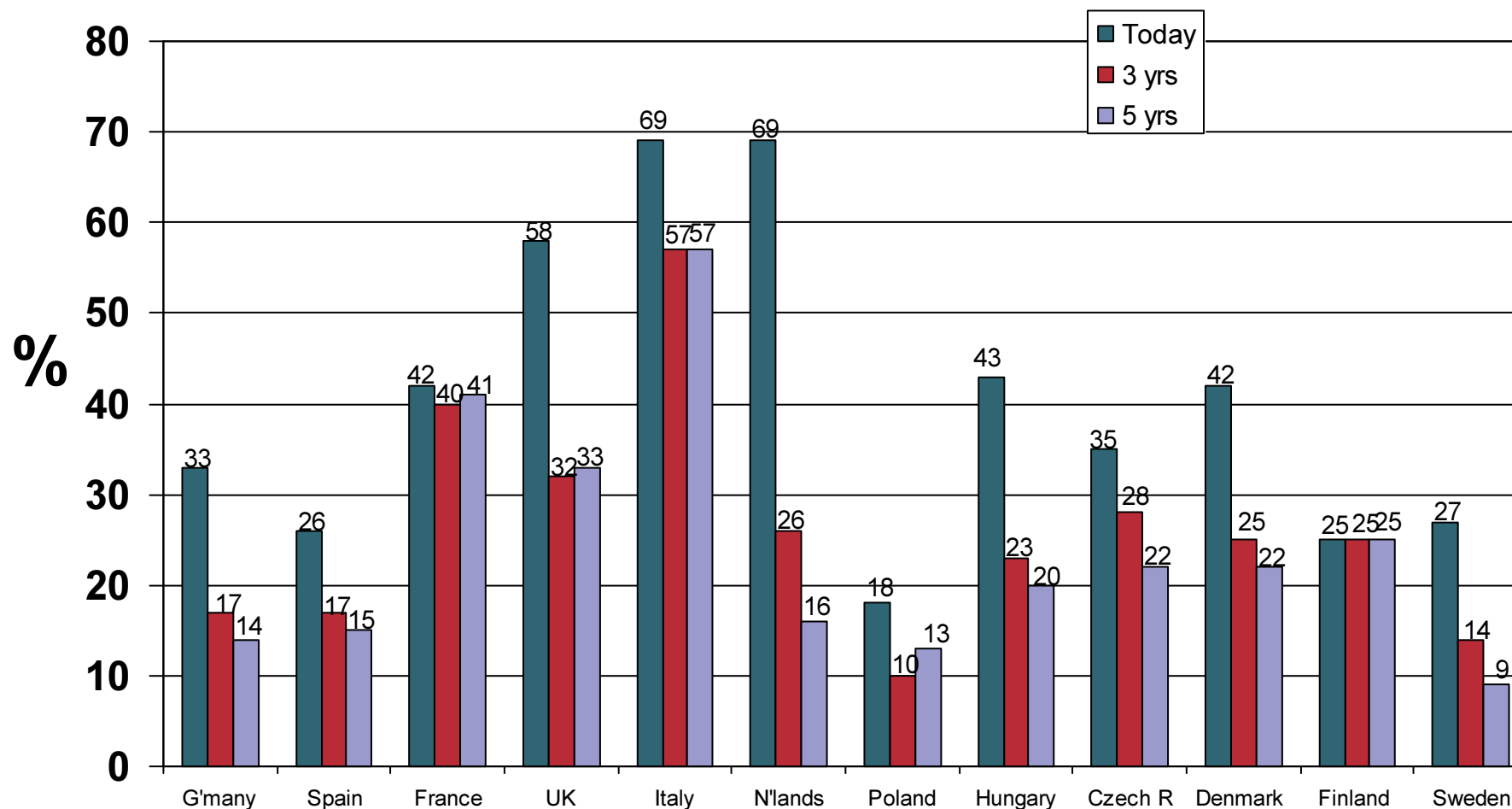
Base = All respondents



Q2 Top Business Challenges Faced: Next 5 Yrs – By Country

Meeting Legislation and Regulation

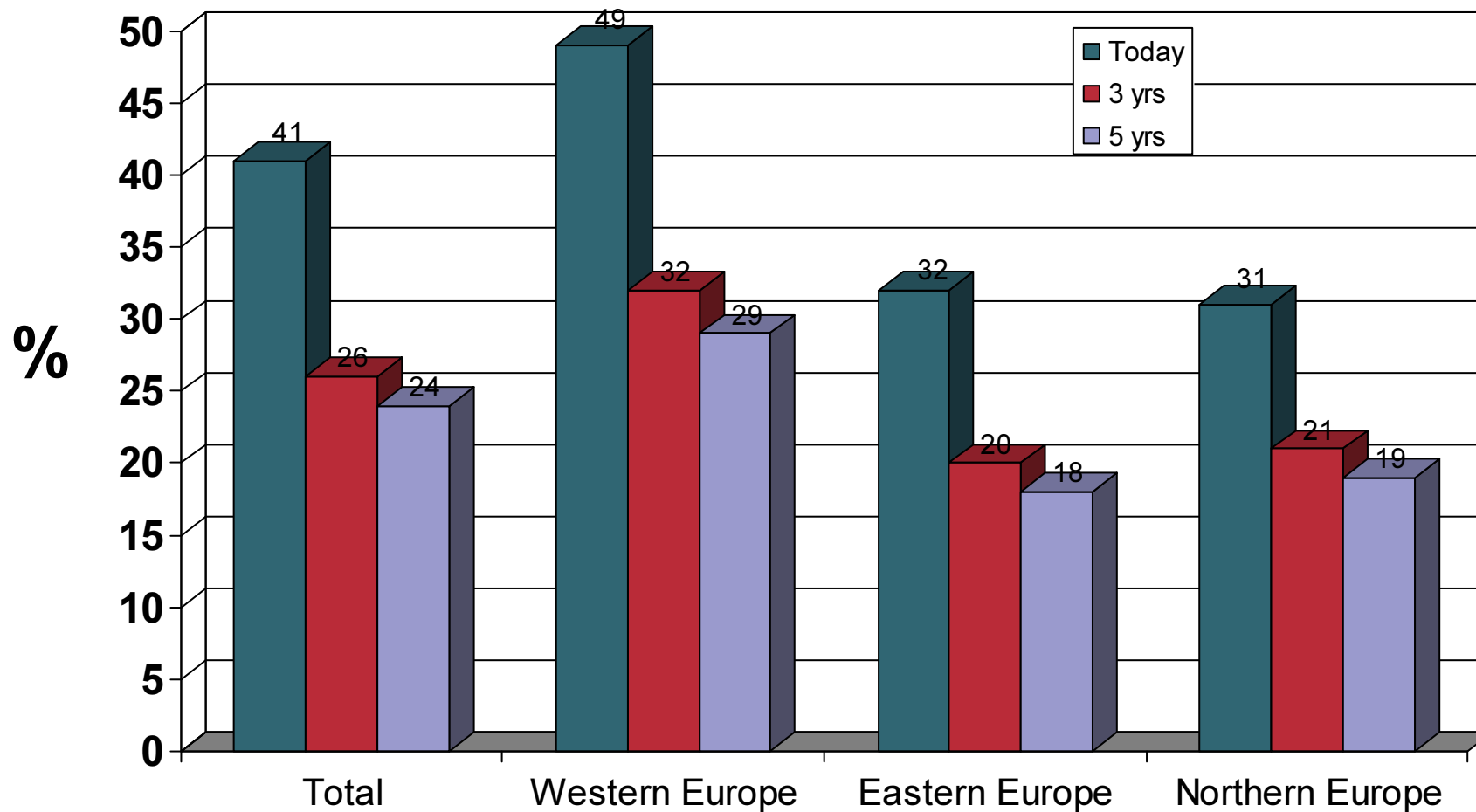
Base = All respondents



Q2 Top Business Challenges Faced: Next 5 Yrs – By Region

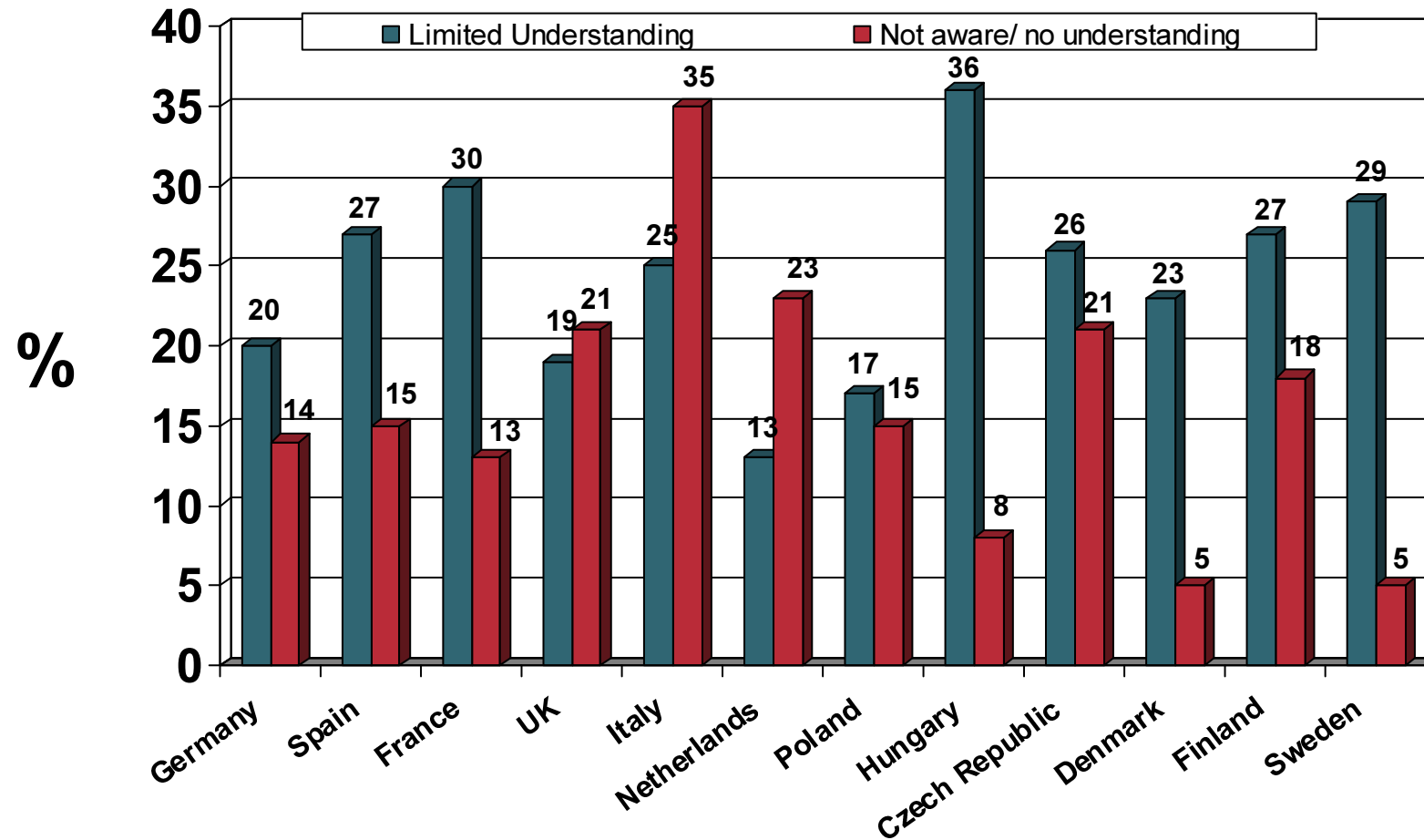
Meeting Legislation and Regulation

Base = All respondents



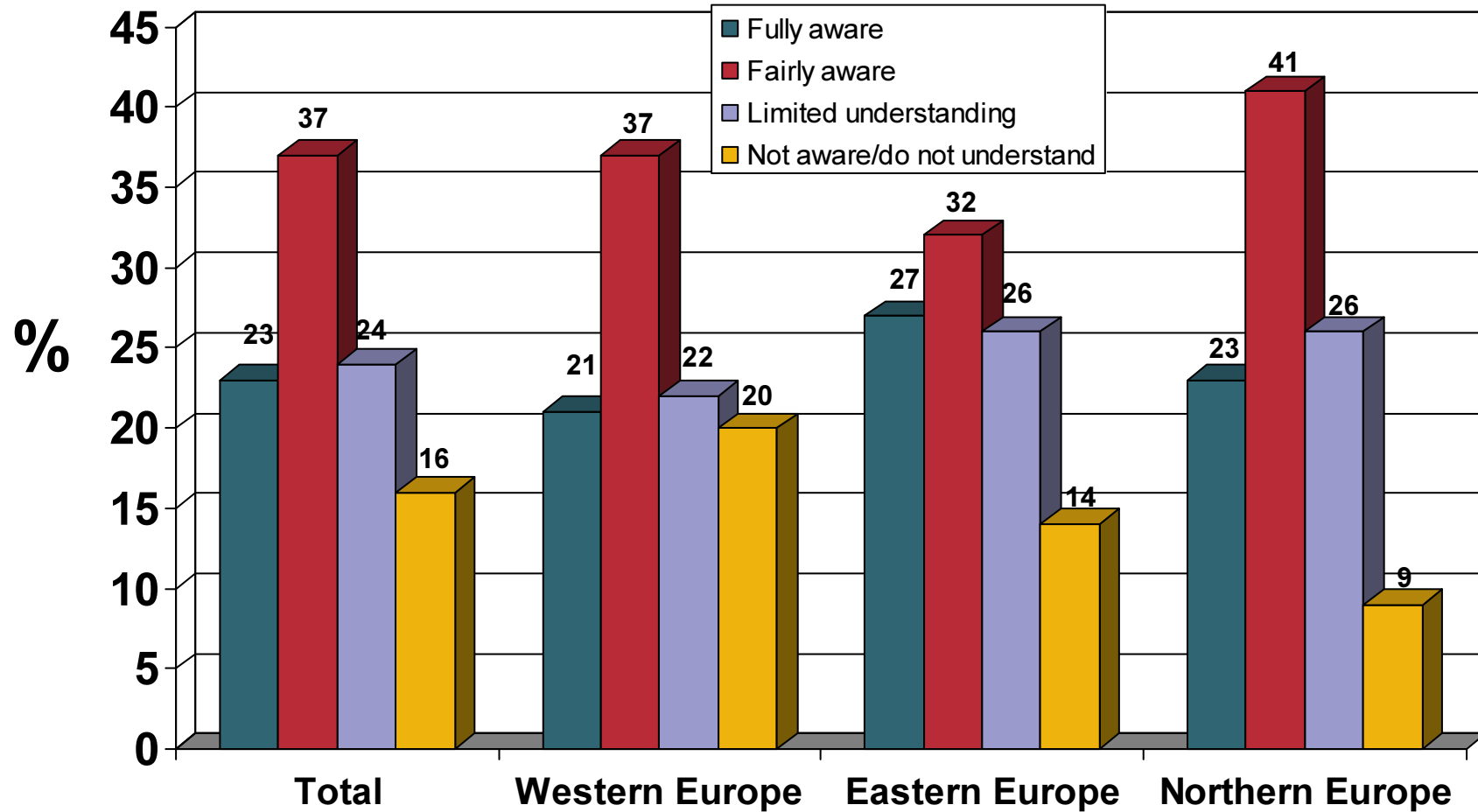
Awareness of IP Telephony

Base = All



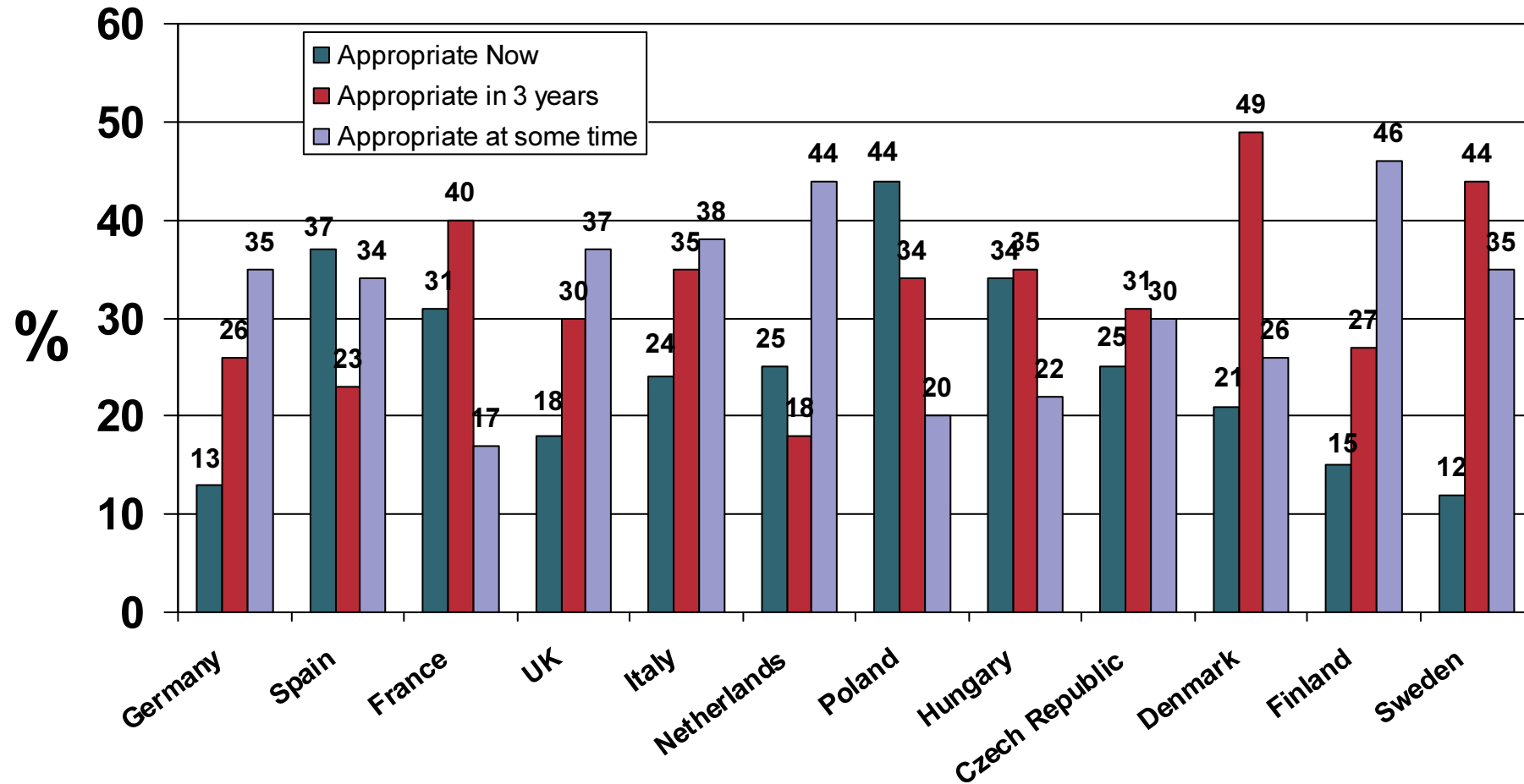
Awareness of IP Telephony – by region

Base = All



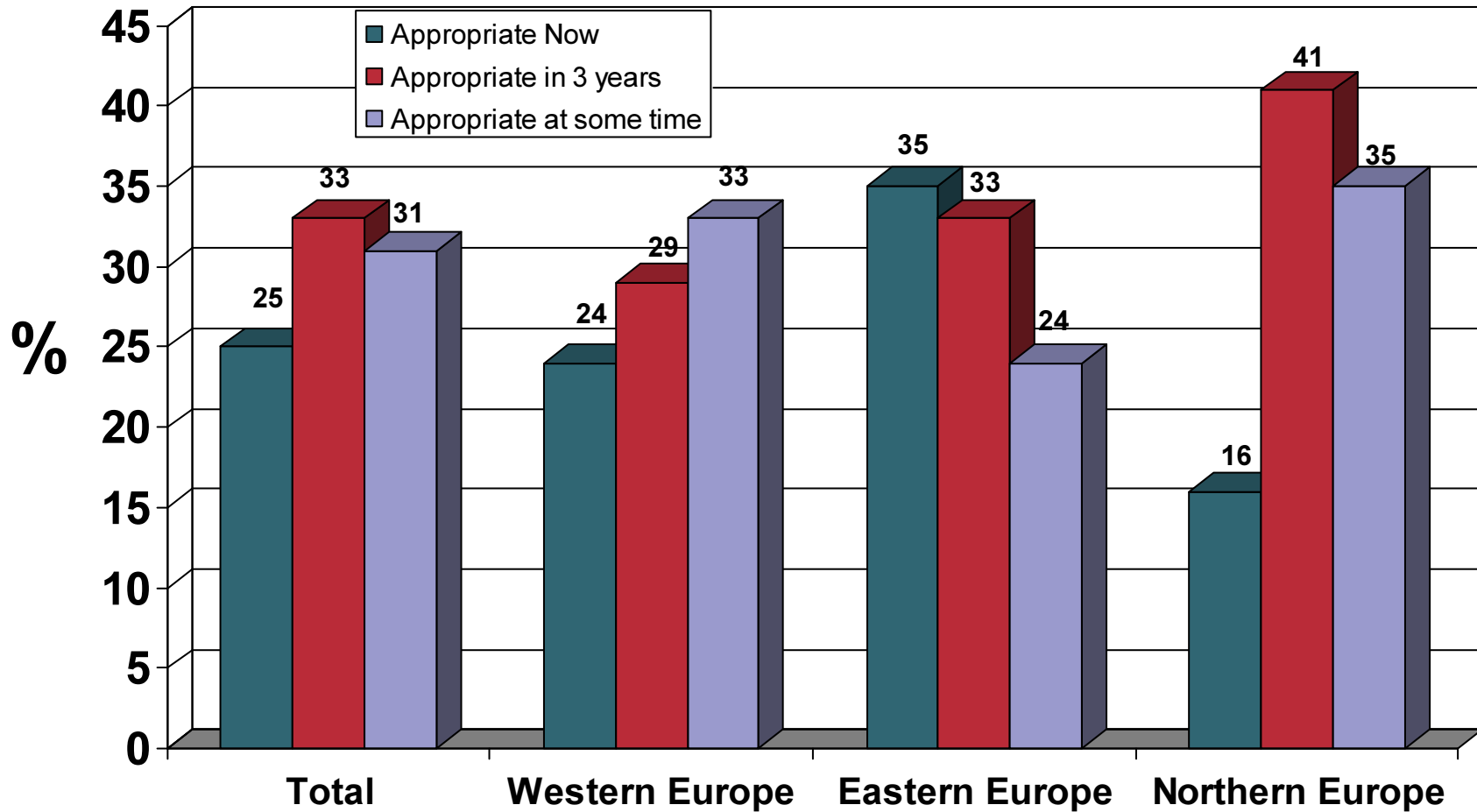
Appropriateness of IP Telephony

Base = All respondents aware of IP telephony



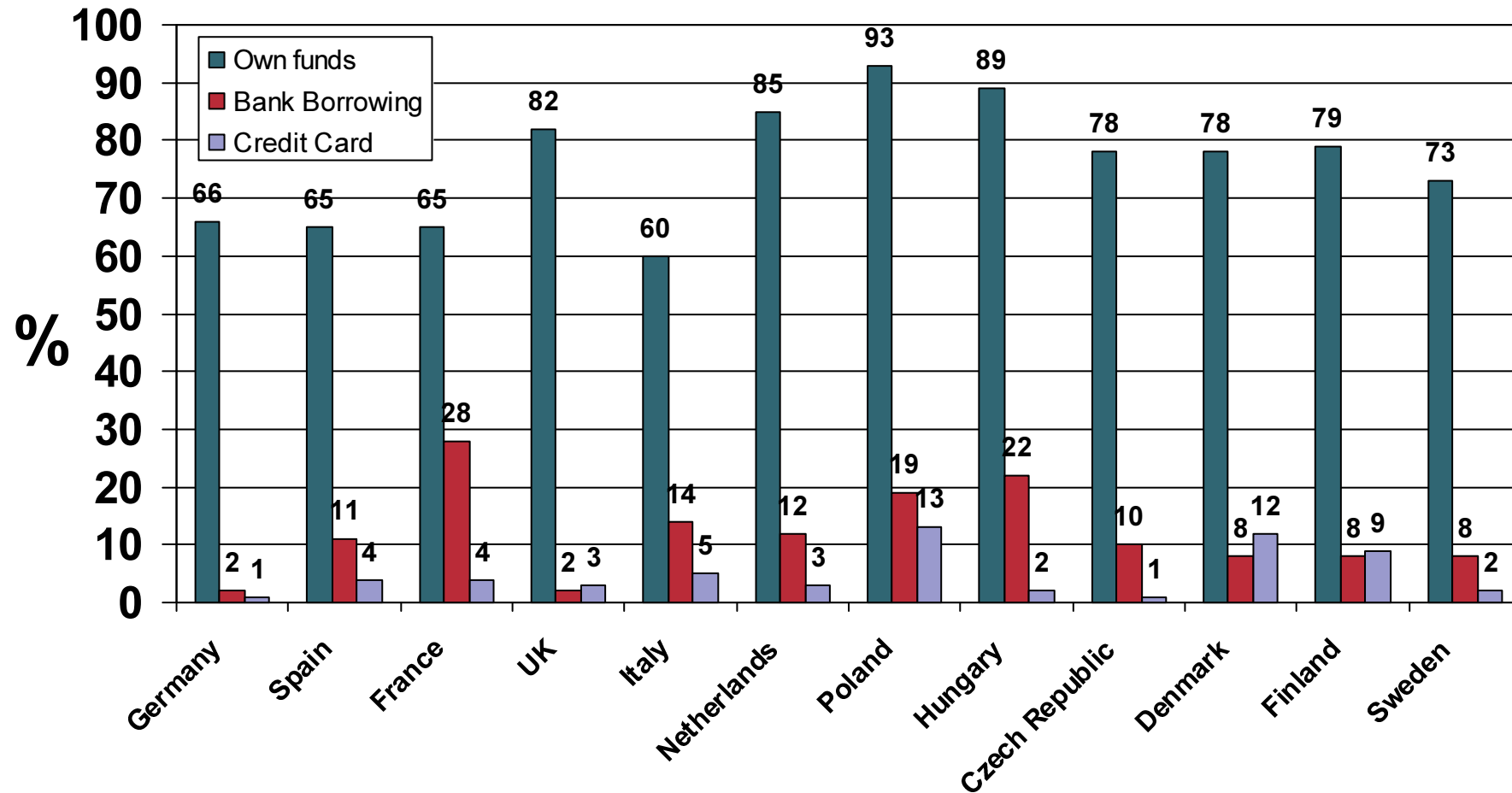
Appropriateness of IP Telephony – by region

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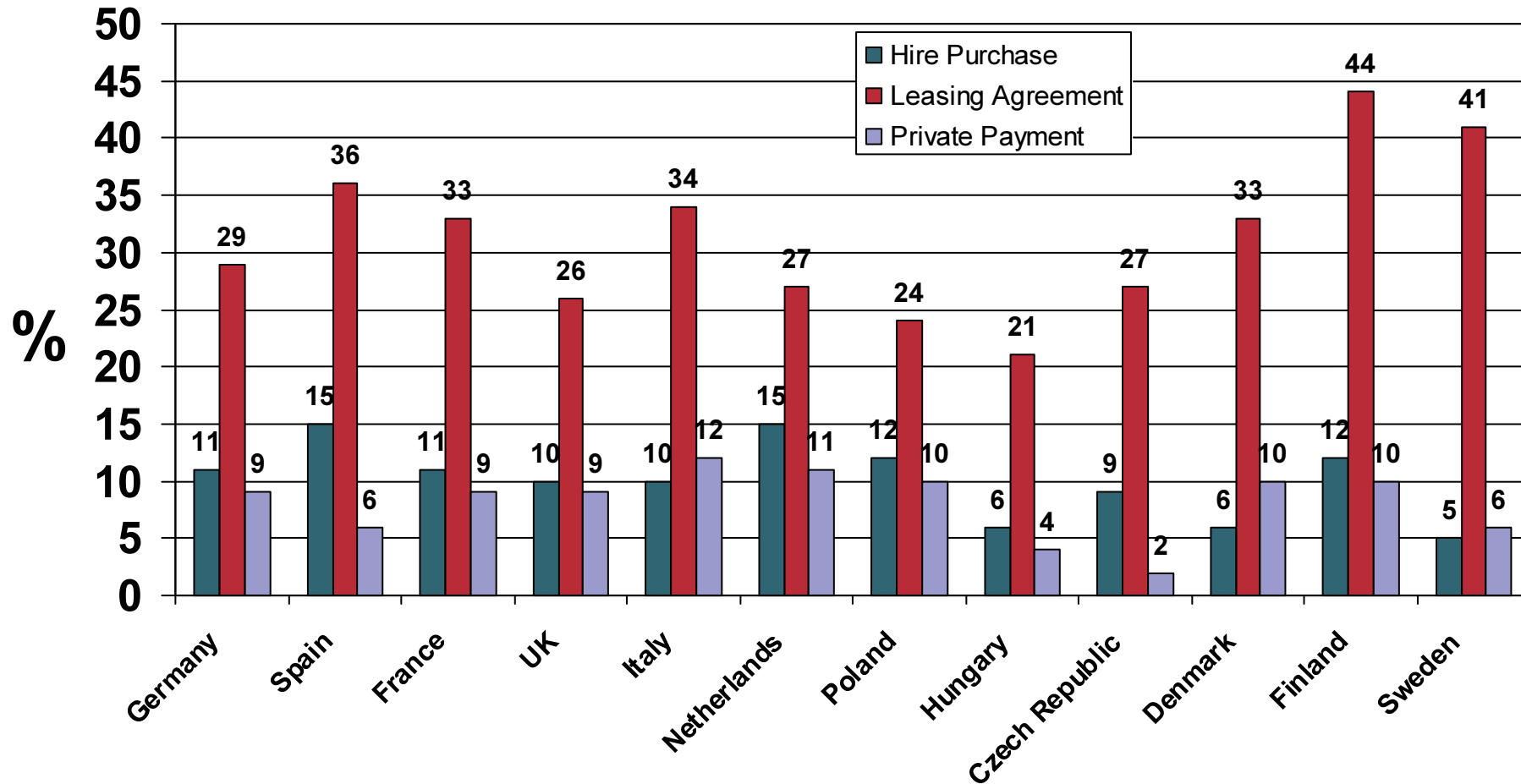
Preferred method of purchasing networking / IT projects and technologies (1)

Base = All



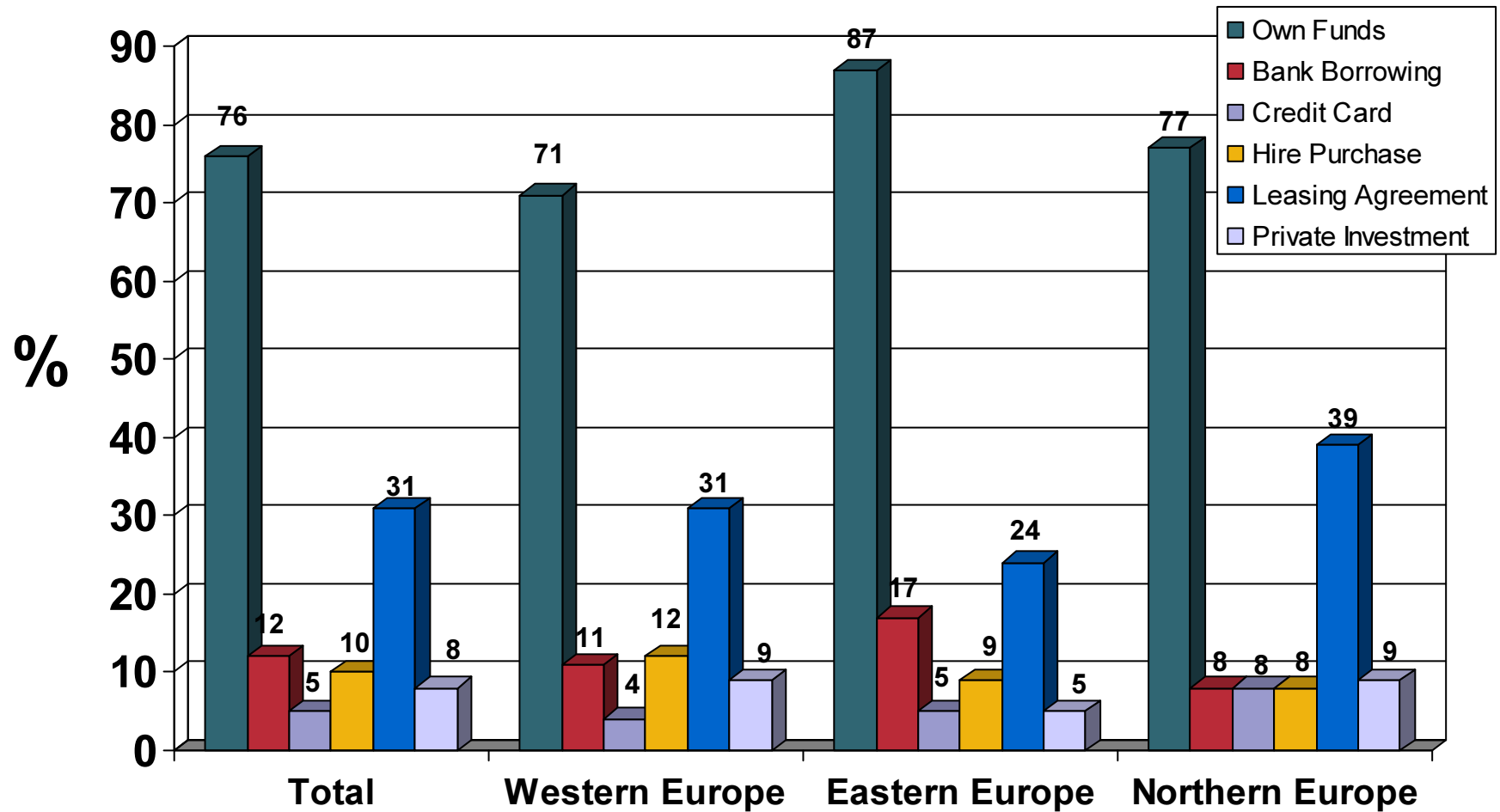
Preferred method of purchasing networking / IT projects and technologies (2)

Base = All



Preferred method of purchasing networking / IT projects and technologies – by region

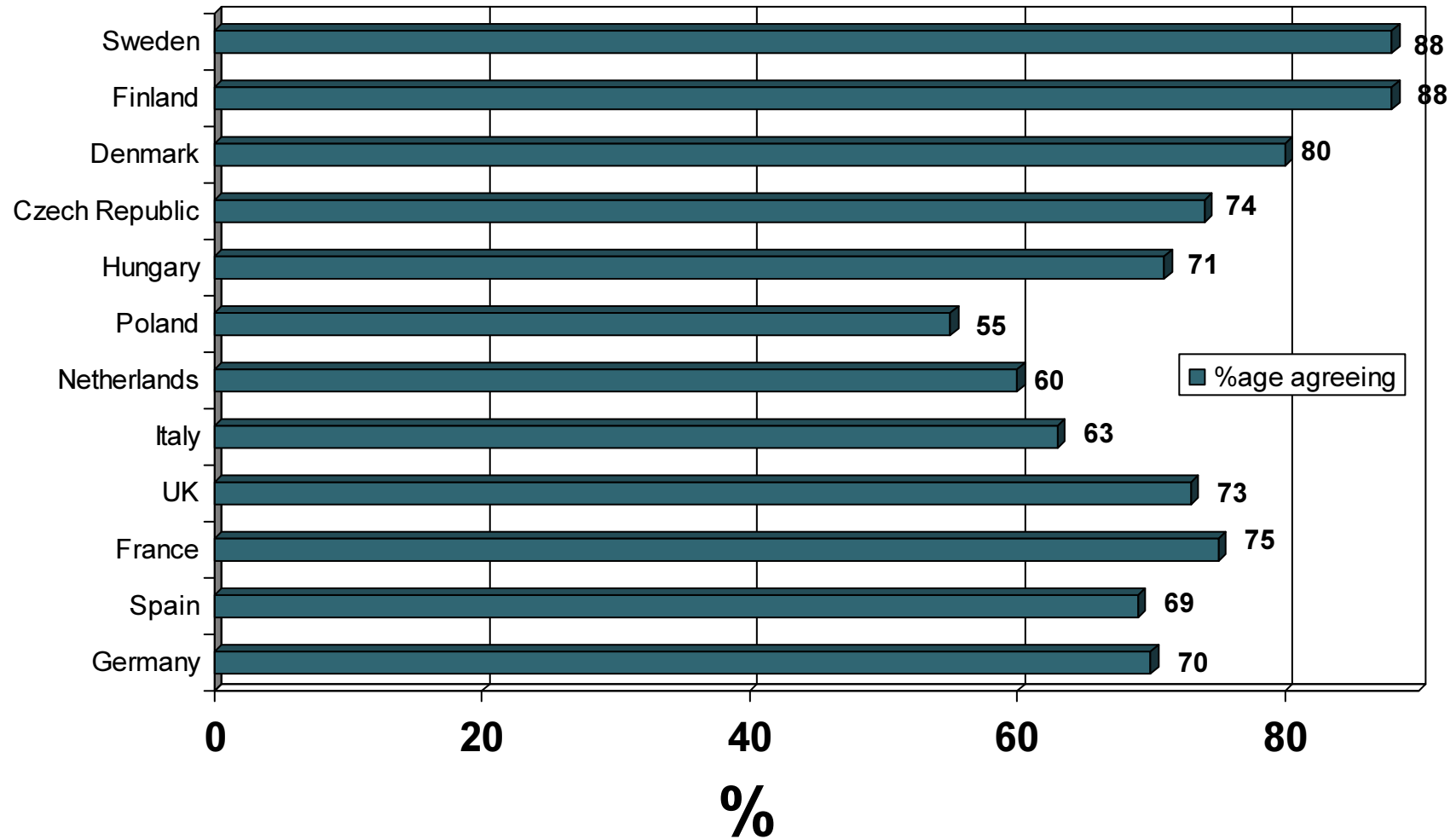
Base = All



Some of the products Technology Solution Providers provide can be too complex for small businesses

By Country

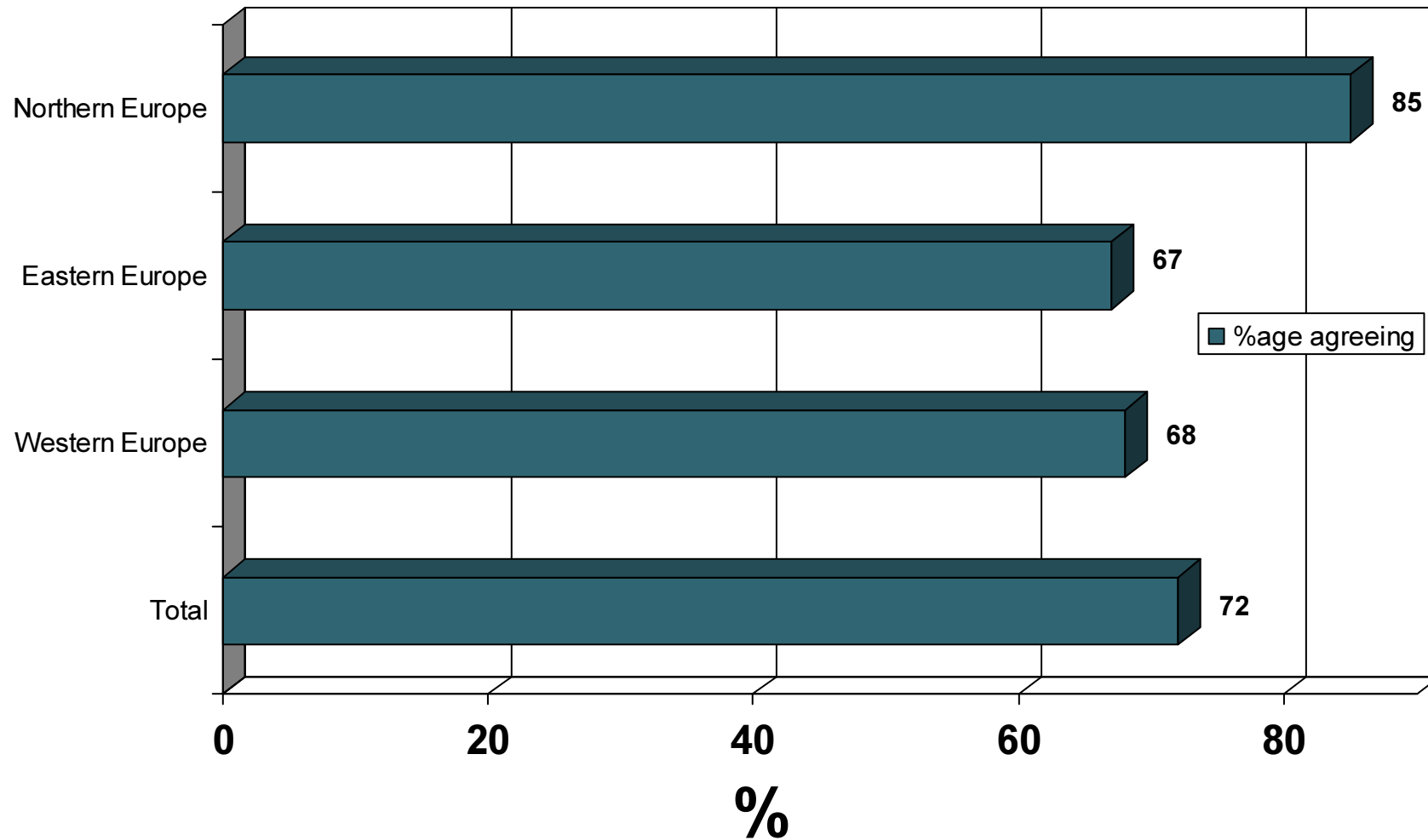
Base = All



Some of the products Technology Solution Providers provide can be too complex for small businesses

By Region

Base = All



Q and A



CISCO SYSTEMS

