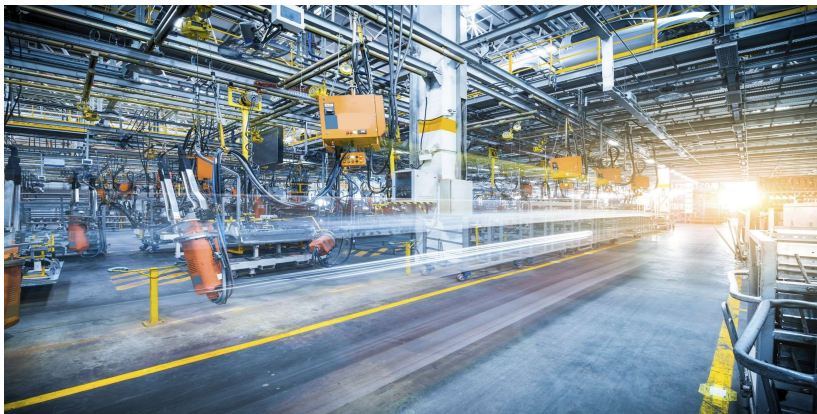


Demanding challenges 2025 for SME's manufacturing companies



sieber & partners 
Bern Zürich

CNO Panel 2022

This presentation is incomplete without oral comment and can lead to misinterpretation.

All shared information are strictly confidential.

Agenda

1. Welcome – who is who?
2. Background & Motivation – why this «Round Table Forum»?
3. THESIS 1 – «Asia goes global»
 - Discussion
4. THESIS 2 – «Economic crises can be forecasted»
 - Discussion
5. THESIS 3 – «Digitization is key for companies Robustness»
 - Discussion
6. Wrap Up & Closing

Who is who?

Peter BAUMGARTNER – sieber&partners

- 35 years experience Business & Market development MTI & SEMI Equipment Industry
- 100% SME & family business companies
- Member of the Board 2006 – 2022
- Support the Industry Initiative on a part time mandate
- Collaboration with www.wirz-partners.ch and www.hpoforecasting.ch



Who is who?

Simona Kipfer – sieber&partners

- Career
 - Transformation Consultant, Dr. Pascal Sieber & Partners AG
 - ERP Implementation Consultant, Rochester-Bern Executive Programs
 - Working Student, SAP Schweiz AG
- Background
 - Master in Information Management
 - Bachelor in Business Administration, Minor in Computer Science



Value Proposition Industrial Manufacturing (intl., leading edge)

- We map, bridge, and integrate **Asia with the Western Hemisphere**
- We **turn knowledge into competitive advantages** of the manufacturing industry. Fields of expertise are:
 - Machine tools
 - Machinery and Electronic Equipment
 - Semiconductor Equipment
- Through continuous exchange with world-class research institutes, the **Knowledge Hotspots** (Boston University, Harvard Business School, MIT, Microsoft, Gartner Research etc.) we ensure access and knowledge exchange in the field of Leading-Edge Technology.
- We **lead from the emerging future**, working model- and method-based to **foster innovation**, and to create **customer-specific solutions**.

Industrial Manufacturing – Mapping, Bridging, and Integrating

Leading Edge Knowledge

Unique Subject Matter Authorities

- Venkatraman
- McFarlan
- Scharmer
- ...

“We lead from the emerging future”

Industry Advisors

- Gartner
- ...

Digital Giants

- Microsoft
- Google
- Amazon
- SAP
- Cisco
- GE, Siemens, ...

Our Value Add

Models

- Combine into 3i
- Map to Use Cases
- Adapt to Customer Cases
- **Tool Based Consulting**

Technologies

- Trends, Hype Cycles
- Pitfalls
- Solution Approaches
- Expert Access

Target Markets

Switzerland

Germany

Japan

South Korea

India

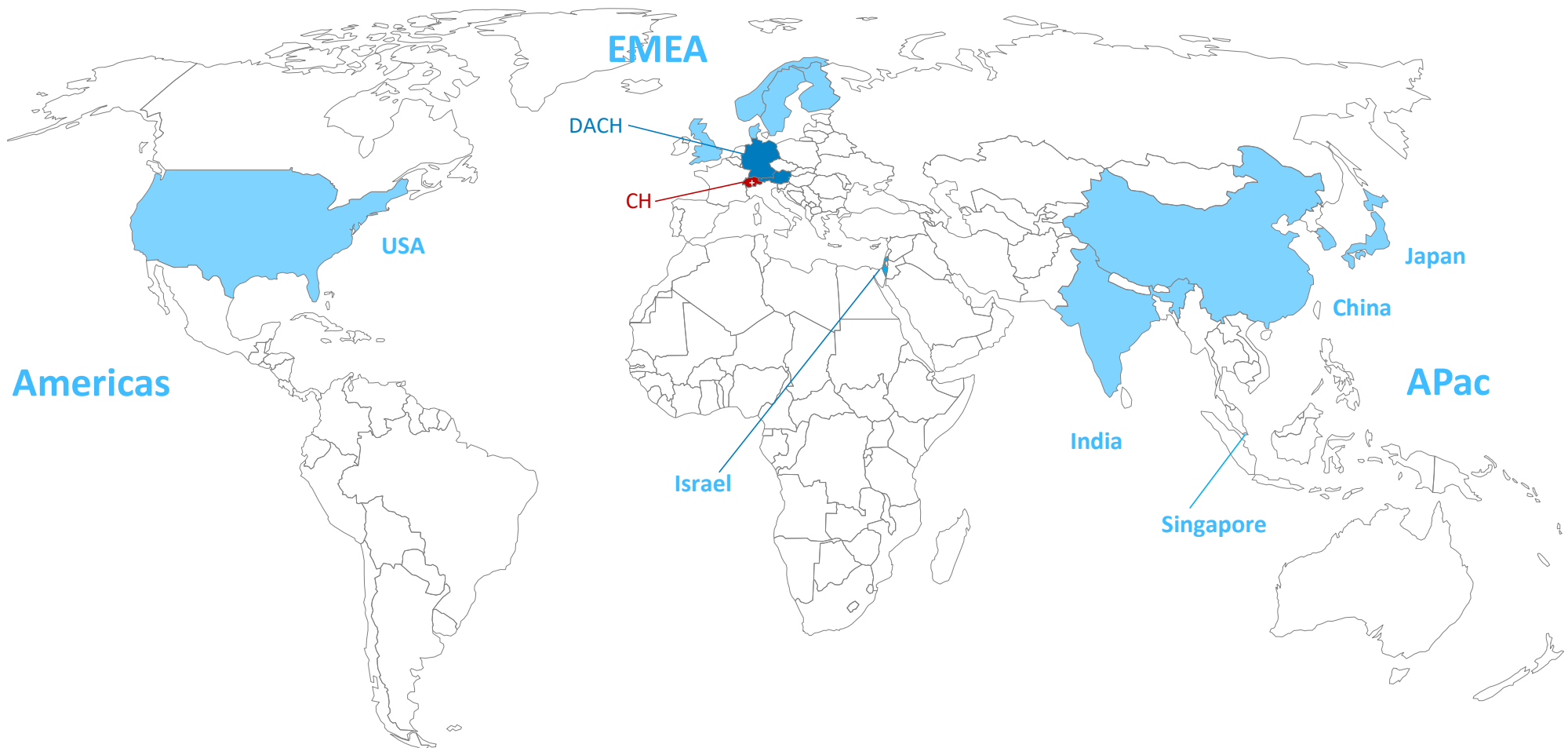
China

Singapore

USA

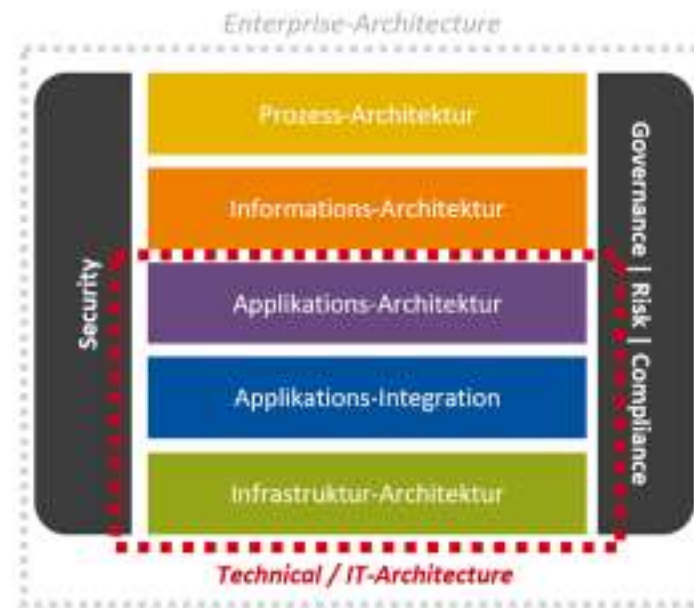
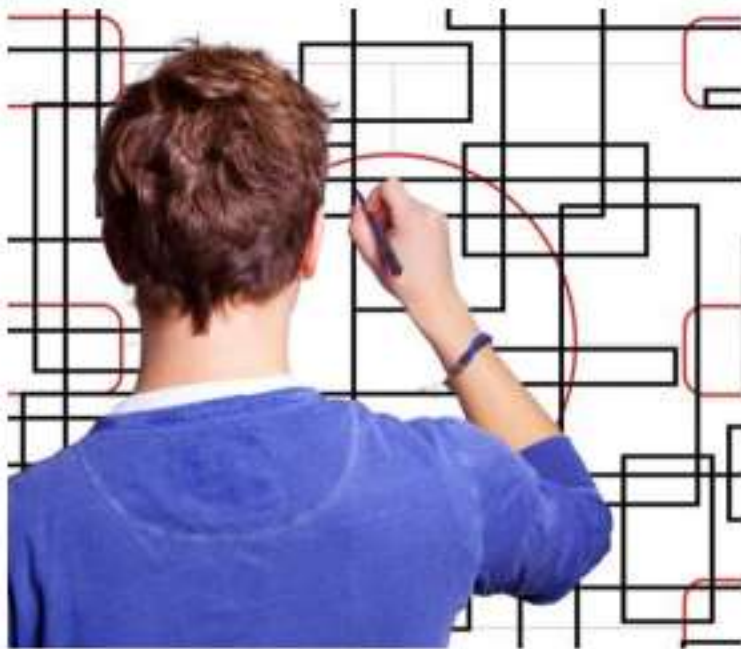
“We turn knowledge into competitive advantage”

Vision Industry – «The market tells us where to act!»



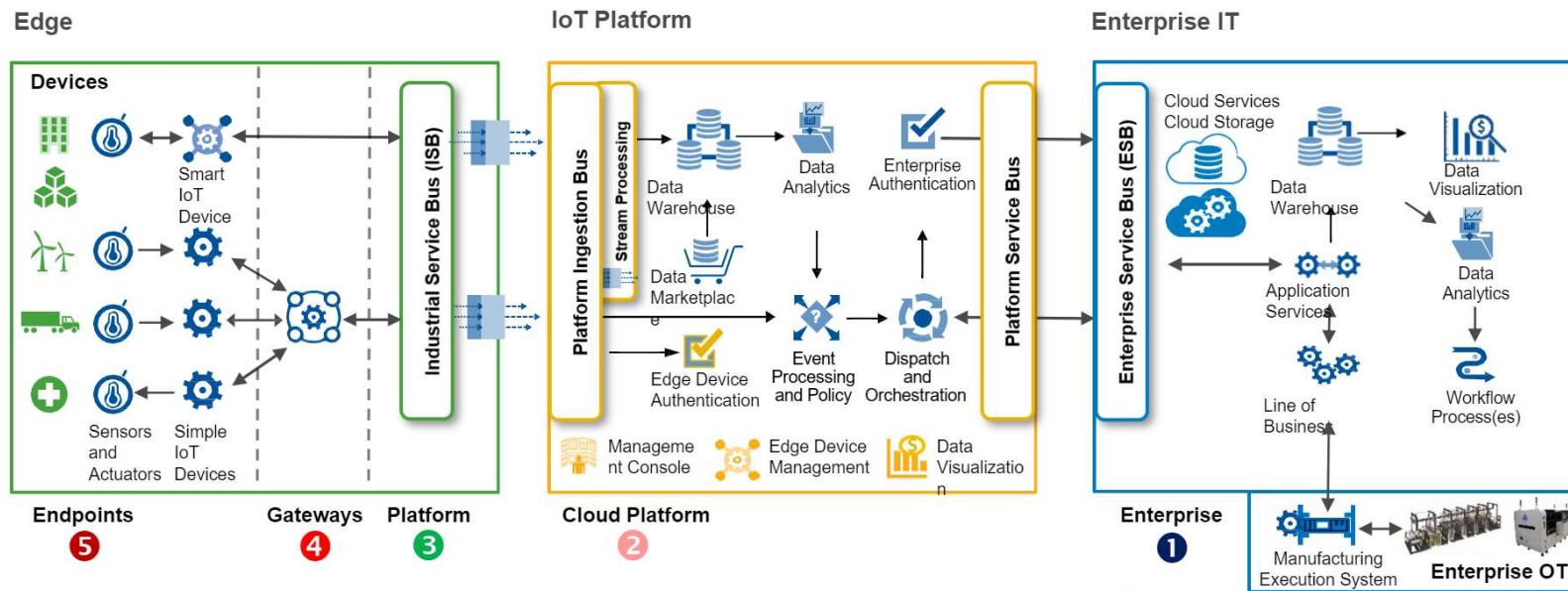
What we do?

Enterprise Architecture – Maturity, Readiness & Implementation



What we do?

Enterprise IT/OT IloT Reference Model (based on Gartner Models 2018)



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What we do?



What we do?

LIQUIDTOOL Systems AG

- Swiss Spin off
- Established in 2016
- 36 Employees



What we do?



Fraction of our Industrial Clients



Industry Clients deal among others with.....

- Enterprise Architecture
- IT-Architecture
- Software Evaluation
- Software Quality Services
- DIGTRA – People Empowerment
- Project Consulting
- IoT - Industry 4.0
- Technology Management
- M&A
- New Business Models
- Ecosystems / Strategic Alliances
- Data-Driven Factory
- Customer Satisfaction



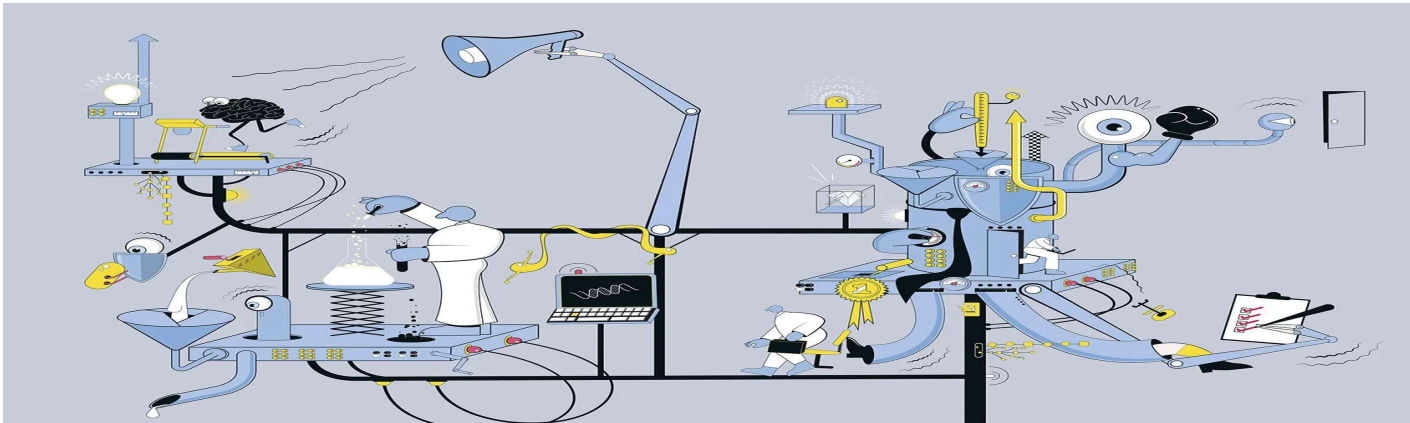
Motivation – manufacturing companies face their greatest challenge!

The SME manufacturing industry is changing at a pace not seen since the introduction of mass production.

- Times of rapid changes such as pandemic effects, supply chain issues, raising interest rates, skilled labor shortage etc.
- Energy and material prices are spiraling. The rise in costs that began in 2021 has accelerated since Russia's invasion of Ukraine, putting unprecedented pressure on suppliers.
- We see a strong increase for an improved level of robustness.
 - Purpose, Culture & Strategy
 - Ecosystems & Networks
 - Process & Organizational Dynamics
 - Leadership & Talent
 - Technology & Data
 - Financing & Investments

Motivation – Robustness

- We define Robustness as the ability of an organization to adapt, develop, and evolve, navigating uncertainty while preserving its functioning, competitive stance, and long-term growth.
- In essence, being robust means that companies are able to remain standing as the ground shifts beneath them.



THESIS 1 – “Asia goes global”

- In the age of Asianization, Asia will shape the USA more than the reverse.
Parag Khanna
- Following the Singapore model, other Asian countries are wisely seeking investment and technology from foreign investors rather than tax revenues.
Parag Khanna
- Asia will have soon more billionaires and millionaires and a larger middle class than any other region. Parag Khanna
- All major providers should have scalable manufacturing plants on each continent. Jianhe Mao
- Dual continent sourcing for all key components. Jianhe Mao

THESIS 2 – “ Economic crises can be forecasted”

- There is an agreement that business cycle fluctuations stem mainly from fluctuations in investment activity. Peter Meier
- The capital goods industry went global many decades ago – I therefore can not understand why so many economists stick rigidly to their nation perspective. Peter Meier
- Economic events are subject to a pulse rate. In a way that makes them predictable. Peter Meier
- The majority of crises are foreseeable. Peter Meier
- The primary aim of forecasts is not to predict the future – but to facilitate a better understanding of these interrelationship. Peter Meier
- Applied to a company – without thorough knowledge of its strengths, weaknesses and interrelationships any forecast is of no use. Peter Meier

THESIS 3 – “ Digitization is key for companies Robustness”

- Digital Transformation is not an option anymore – its’ a MUST.
- Companies without a digital initiative are on the way to tomb.
- Digital programs are always TaylorMade.
- Businesses should make sure not to miss the “digital transformation” train because successful transformation will be the key to all the changes following Industry 4.0.
- New skills in the HR department are essential for the period beginning with Industry 5.0 (Industrial collaboration).
- At the end it’s all about the learning curve.
- It’s a Board and CEO responsibility – sustainable leadership is key.

Wrap Up & Summary

Thesis 1: Asia

- Dual continent sourcing is expensive and not all SME can afford it
- China is not cheap anymore but can provide alot of ressources. China lost alot of money due to corruption.
- Beside China new opportunities in India and Taiwan are emerging
 - India is growing and fighting to be the first choice (over China)
 - Taiwan is waking up and investing to keep up with China (e.g. enhance level of automation in factories)
- On the shortterm the dollar will still be the determining currency. A change will only be triggered by politics

Thesis 2: Forecasting

- *Hpo Forecasting presented its forecasting model. Due to the running time we had to shorten the discussion afterwards*
- Forecasts solely based on Sales are not sufficient -> an outside view has to be included
- In Forecasting it is important to work with scenarios

Thesis 3: Digitization

- Learning curve of humans and machines are intersecting
- The Technology is growing exponentially and companies can only deal with linear change which leads to a transformation gap. Companies should focus on behavioural rather than technical changes. The employees are the core of the transformation.
- C-Levels are responsible for the transformation and have to be enabled to do so. On the other hand the companies should listen to skilled employees that they already have an get their ideas.
- Level of digitization varies depending on the industry
- There is not **one** utopian vision of a digitized world: it is difficult to come up with a definition that works for all companies and industries. The question to ask is: what do you have to do to stay relevant in the future market

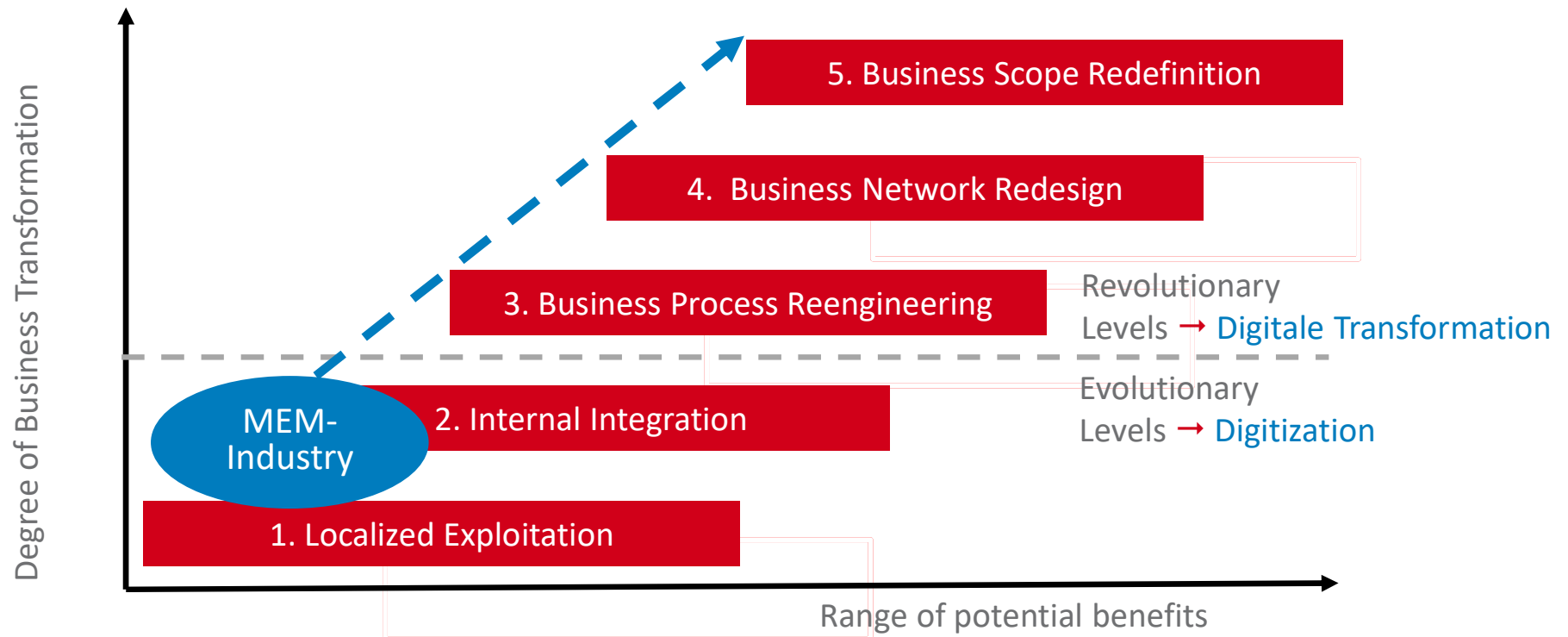


Thank you for your
attention!

sieber & partners 
digital business excellence

From automation to redefinition of the business model

From automation to redefinition of the business model



Quelle: Venkatraman, V.: IT-Enabled Business Transformation: From Automation to Business Scope Redefinition, Sloan Management Review; Winter 35 (1994) 2, S. 73ff. (Member of the CNO Hall of Fame)

Ecosystem MEM Industry – who is who?

