

FinTech Industry in Switzerland Landscape Overview 2021 Q4

Teaser

December, 2021

FinTech in Switzerland Landscape Overview 2021

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Introduction

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The FinTech Industry is one amongst other contributors to the Swiss digitalisation process. The study is performed based on the analysis of Swiss enterprises involved in finances, their current status and evolution over the last years, their technology progress, and trends with obstacles. The overview revises the FinTech structure in Switzerland, the most impactful influencers, and various business cases related to the industry.

Switzerland is one of the biggest FinTech players in Europe, hosting a plenty of successful FinTech companies and start-ups. Additionally, the report covers collaboration between FinTech businesses and government as well as governmental initiatives in this field and Swiss experience of developing financial services during the COVID-19 pandemic.

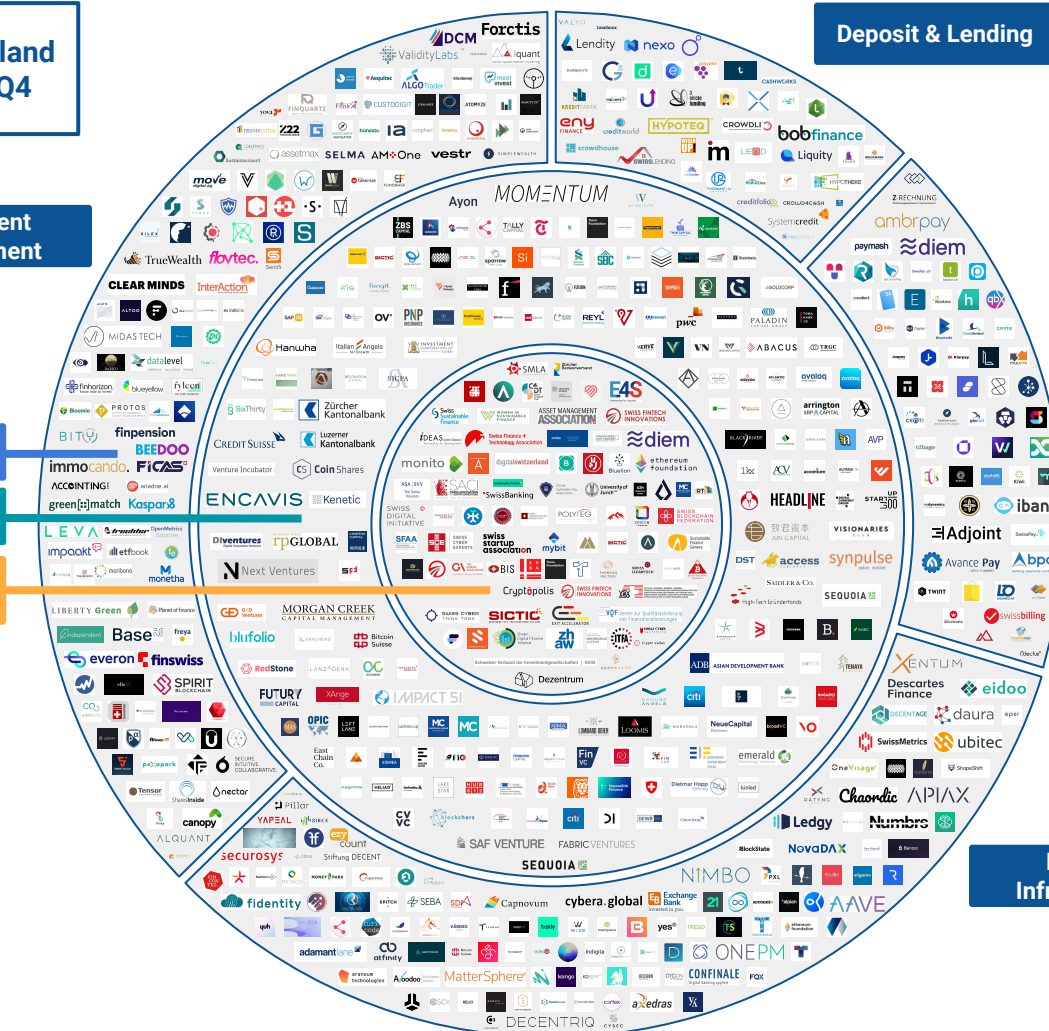
FinTech Industry in Switzerland Landscape Overview 2021 Q4

Investment
Management

Companies

Investors

R&D, Hubs,
Non-Profits



Payment

Banking
Infrastructure

Executive Summary

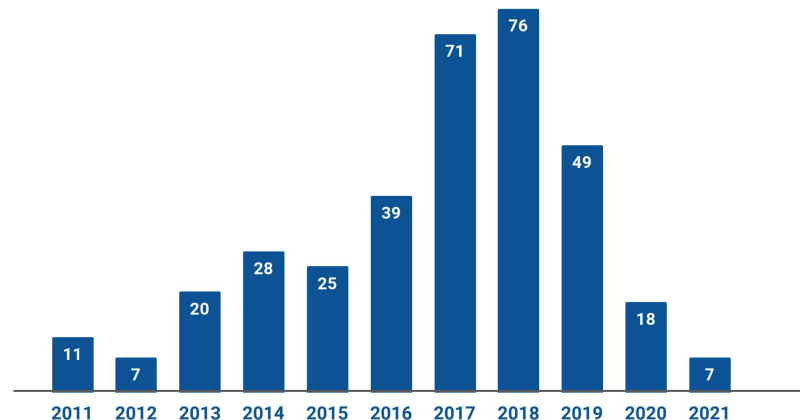
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Analysing FinTech companies, such technologies were highlighted: Distributed Ledger Technology, Blockchain, Artificial Intelligence (AI), Big Data, Cloud Computing, Internet of Things, Software-as-a-Service, Robotics Process Automation, and Machine Learning. The analysed companies belong to such industries as software, analytics, advertising, e-commerce, etc.

The report represents a deep analysis to highlight the importance of FinTech nowadays. It shows how elaborated and diversified is its application and emphasises the real-life examples with particular facts and figures. All the data and insights provided in this study make up a big picture of the present FinTech state in Switzerland.

Number of FinTech companies founded over the years



Key Findings

5
2021 global FinTech rankings

39
Nonprofit organisations

356
FinTech companies

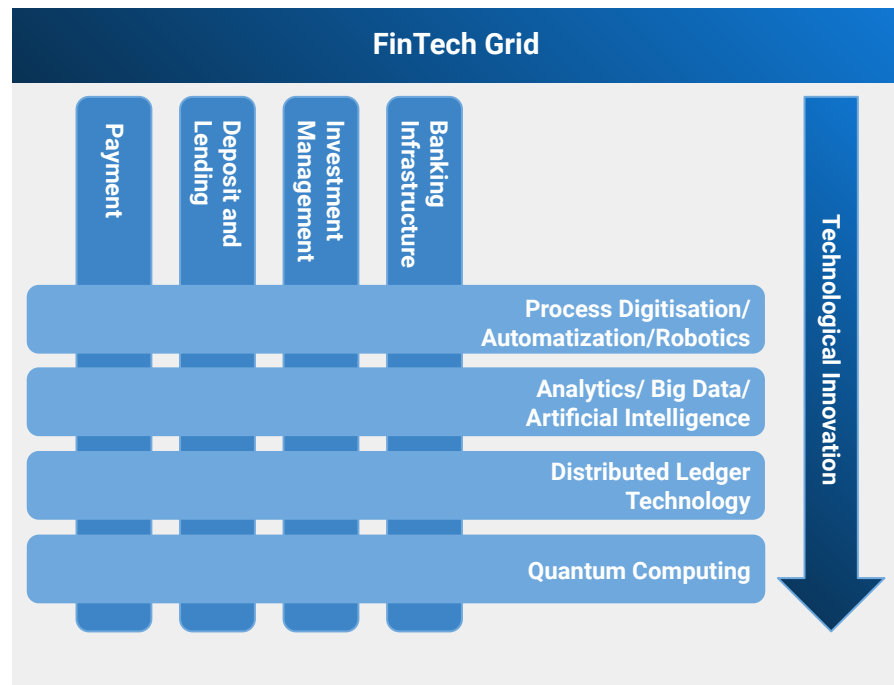
Zurich
Main canton by the number of
FinTech companies

FinTech Industry in Switzerland

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Chart comparison by country 2021

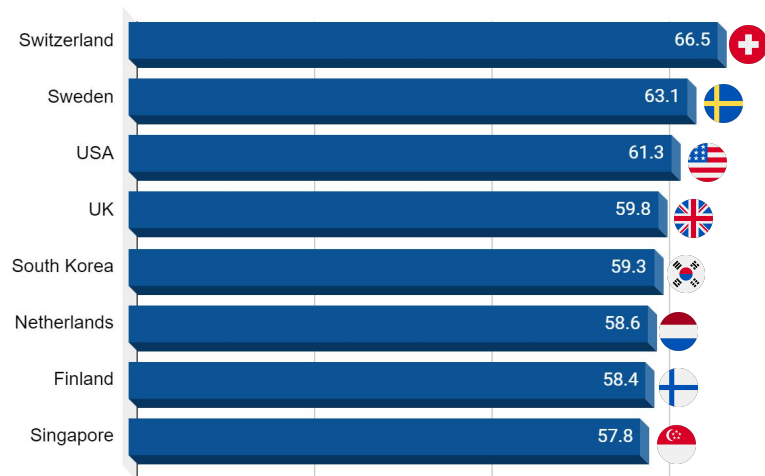
Country	European Ranking	World Ranking	Change from 2020 (World)
United Kingdom	1	2	±0
Switzerland	2	5	±0
Sweden	3	7	±0
the Netherlands	4	8	-2
Germany	5	9	+3
Lithuania	6	10	-6
Estonia	7	11	-1
Finland	8	13	1
Spain	9	16	-3
Ireland	10	18	-1



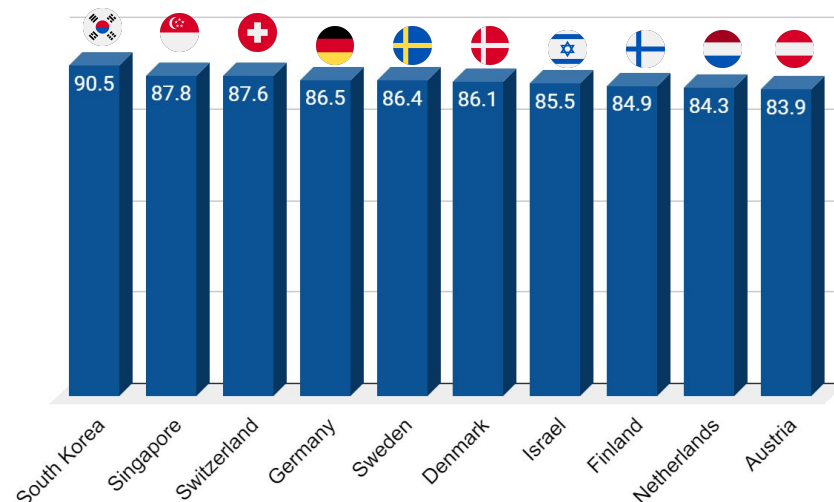
FinTech in Switzerland Landscape

As of the end of 2020, a total of 405 FinTech companies were registered in Switzerland, representing a 6% increase compared to 2019. Switzerland is the home to a thriving start-up scene with more than 47 accelerators and incubators, 20 investment funds, 18 events and networking organisations, and many other ecosystem players. Operating in various sectors, Swiss start-ups are mainly prominent in FinTech and blockchain, with the Zug region having gained the nickname Crypto Valley.

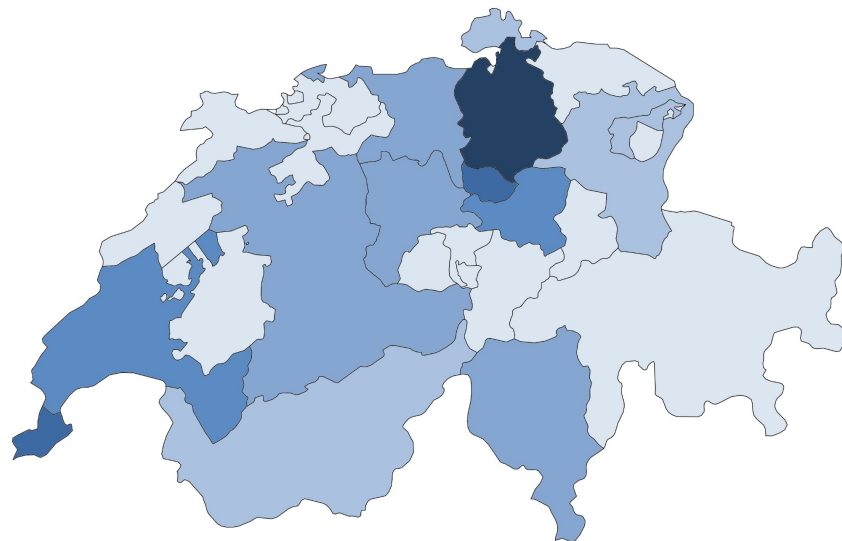
The World's Most Innovative Countries



The World's Most Innovative Economies



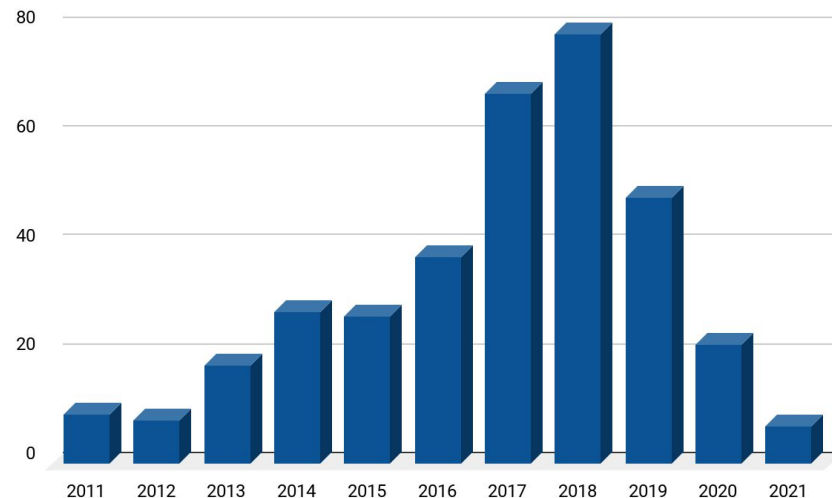
State of FinTech in Switzerland



Top 8 Cantons by Number of FinTech Companies

Zurich	132	Schwyz	15
Zug	111	Luzern	8
Geneva	34	Ticino	7
Vaud	18	Bern	7

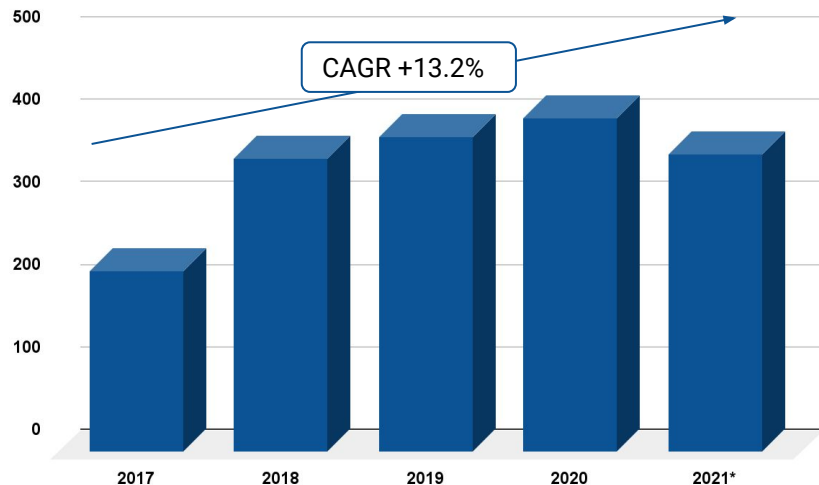
Dynamics of Company Foundings 2011-2021



In 2021, the FinTech sector in Switzerland is comprised of 365 companies, the majority of which are situated in the cantons of Zurich and Zug. Apart from those, a number of companies is situated in the other high business-activity areas such as Geneva, Vaud, Schwyz. In terms of the company foundings, by 2018, the sector has shown increasing rates of growth, yet in 2019-2021, the growth rate slowed down due to the COVID-19 pandemic.

Overview of Swiss FinTech Companies

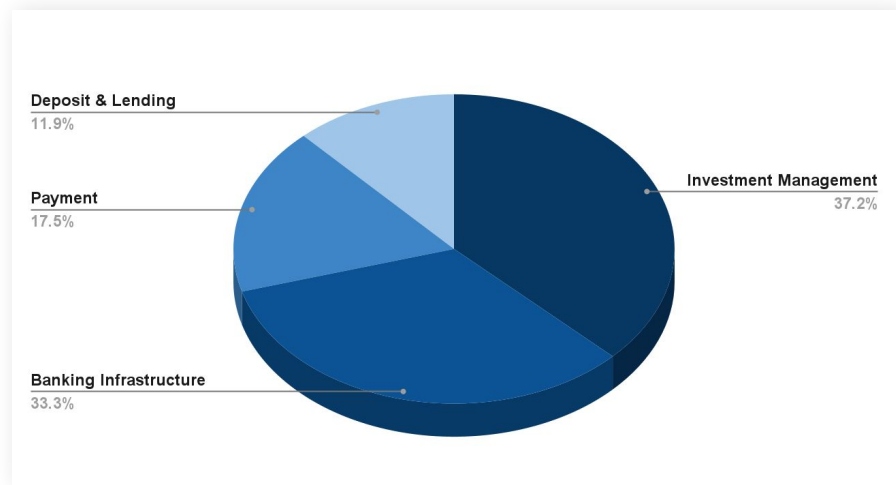
Dynamic of Number of FinTech Companies



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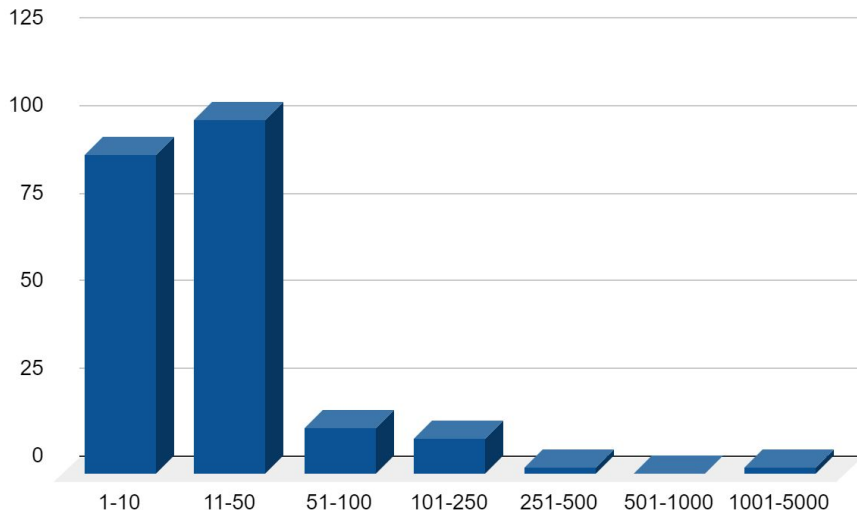
Total amount of FinTech companies in Switzerland has increased by 64.1% in 2021 compared to 2017. A slight decrease of 9.8% in 2021, in comparison with 2020, was observed mostly due to COVID-19 impact. Another reason of the change in the number of companies is that there are companies that leave the FinTech sector because they are no longer active, have relocated abroad, have merged, have been acquired, or have changed their business model in such a way that it no longer falls under the definition of FinTech. During the observed period, the Investment management sector has been having the biggest share. In 2021, the share of this sector is 37.2%, followed by Banking Infrastructure with 33.3%.

FinTech Companies by Categories as of 2021

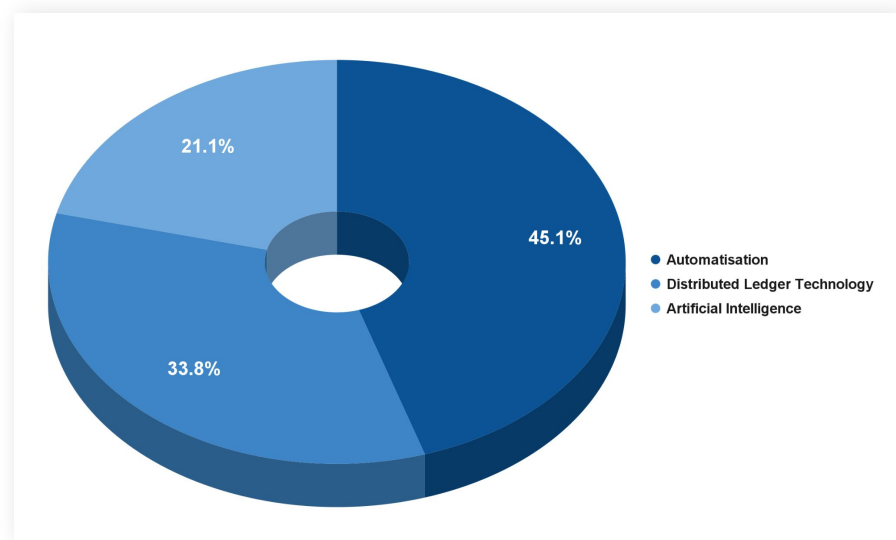


FinTech Companies by Categories and Technology

FinTech Companies by Number of Employees



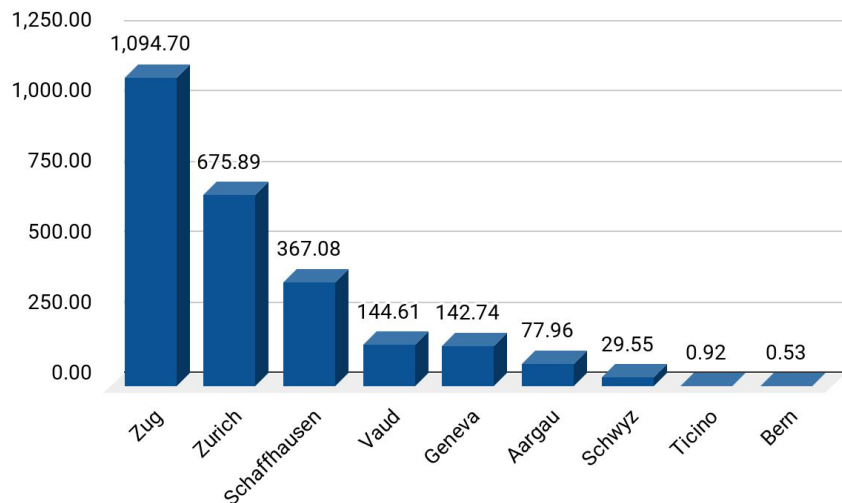
FinTech Companies by Technology



The majority of Swiss FinTech companies are of the smaller scale, with more than a half of them coming in size of 1-50 employees. The COVID-19 pandemic has affected the smaller companies harsher than the larger ones, so their size amounted to the trust increase they have received, henceforth there is a likely change coming to this redistribution. In regards to the technology levels, the majority of the Swiss companies are at the first stage of automatization. When it comes to the later stages, those combined still pass over the first one, with the DLT technology stage overcoming the AI stage by an impressive margin.

Top Switzerland Companies' Funding by Categories, 2020-2021

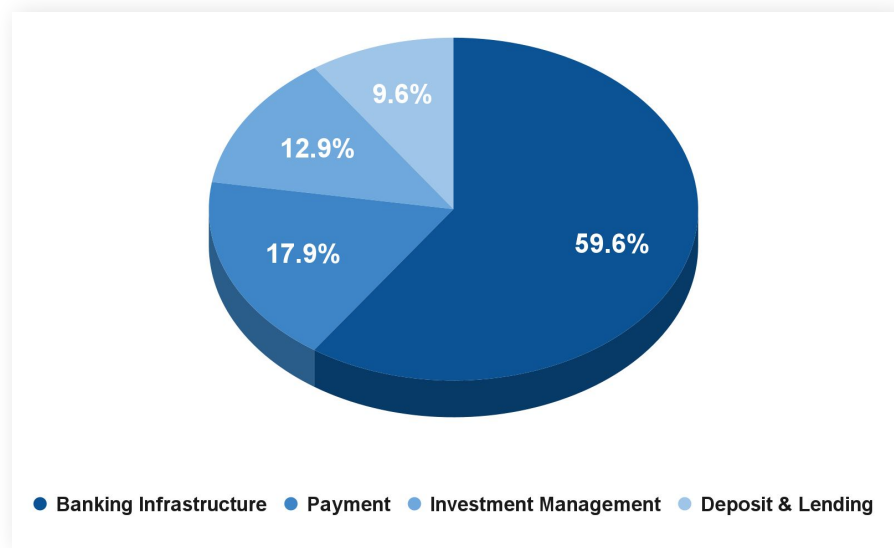
Funding Redistribution by Canton (in CHF* M)



*Converted from USD. Rate - 0,92 USD/CHF

The majority of funding in 2020-2021 has been received by the companies from the cantons of Zug, Zurich, and Schaffhausen, amounting approximately to CHF 2 billion. Zug's being in the lead of funding hubs is no surprise due to the concept of Crypto Valley while Zurich represents one of the largest Swiss industrial hubs. As for the industrial redistribution, the majority of funding was received by companies that for the banking infrastructure, amounting to more than half of all of the funding in the sector.

Funding Redistribution by Industry



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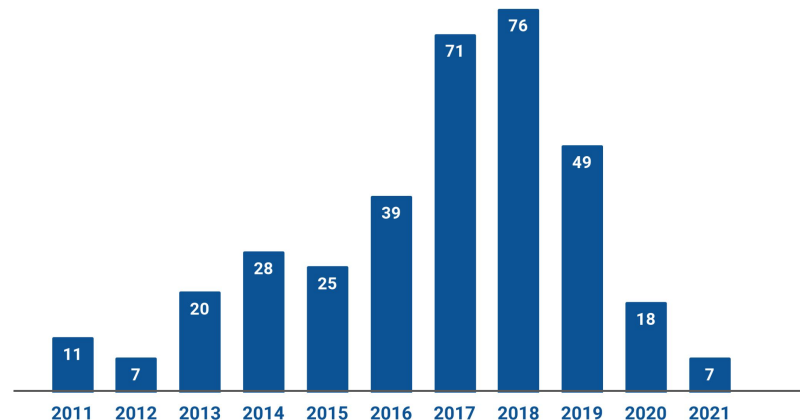
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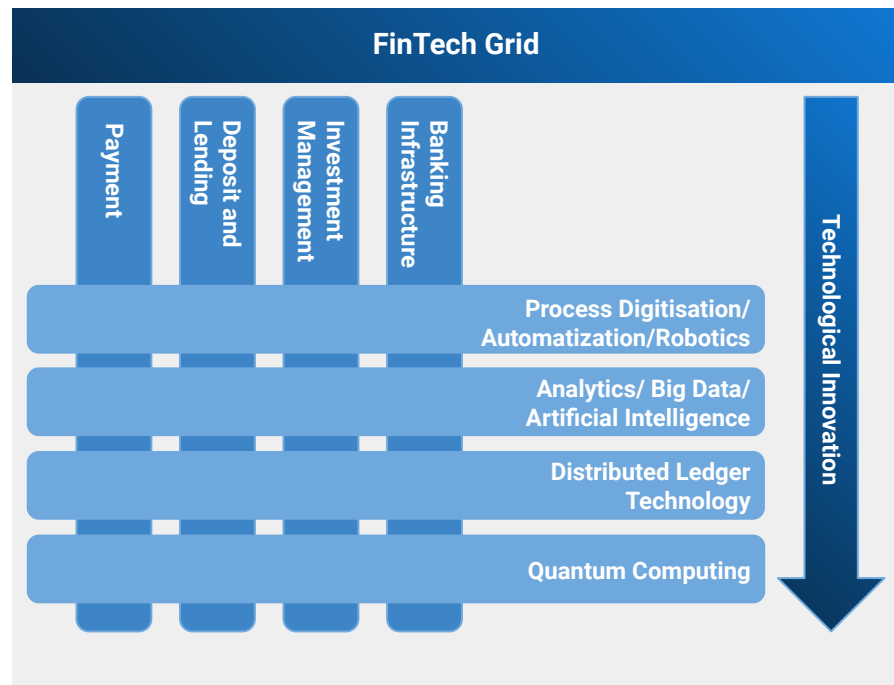
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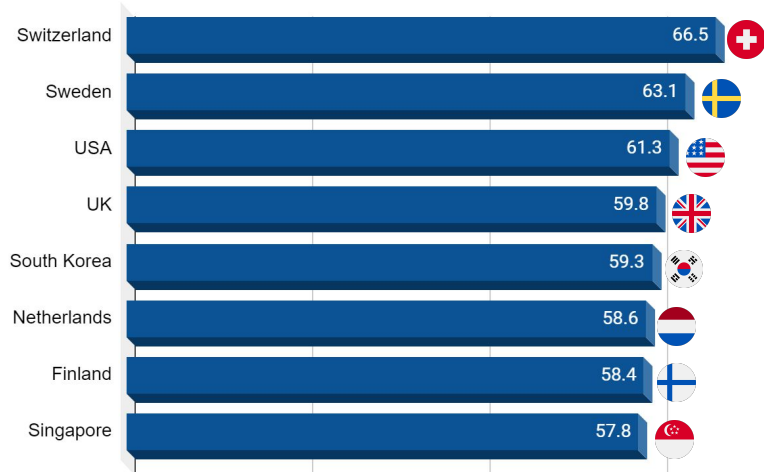
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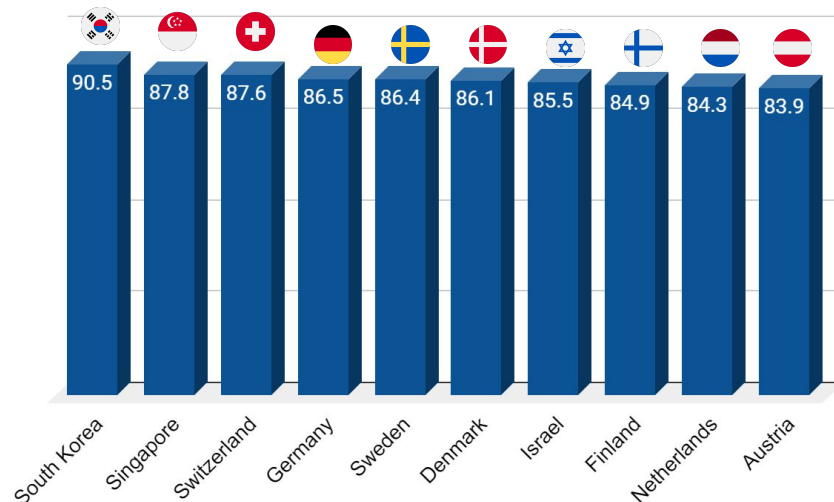
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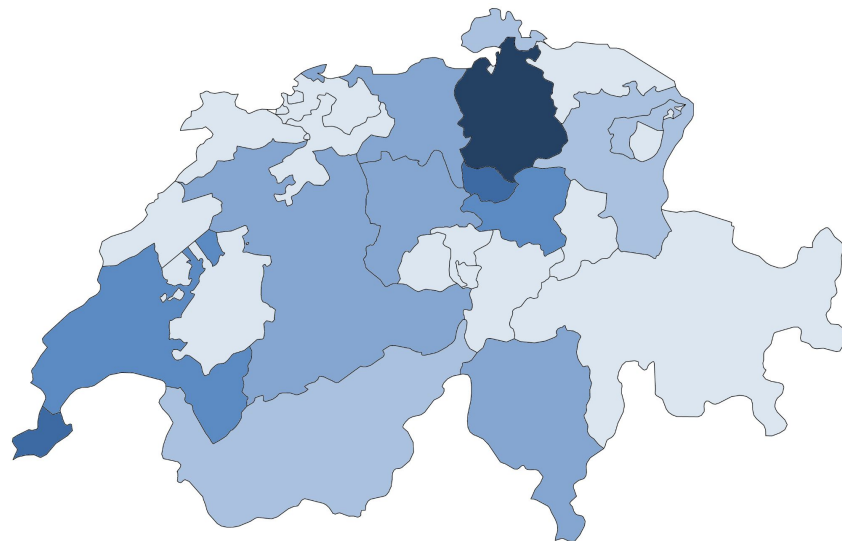
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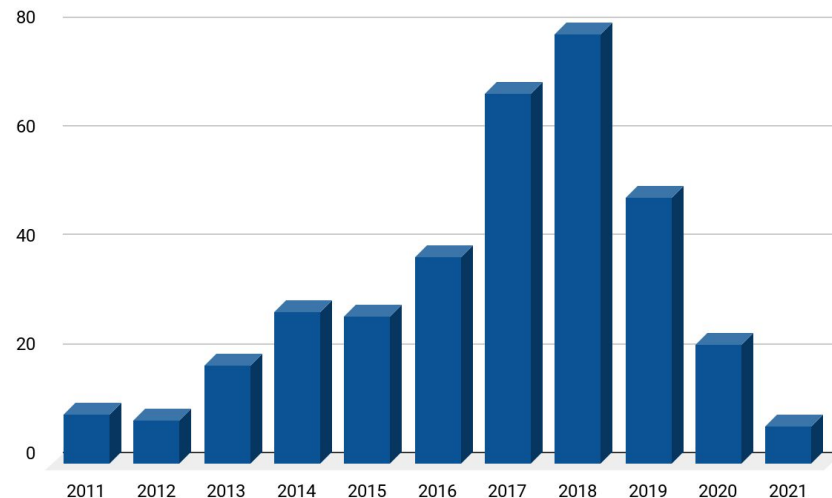
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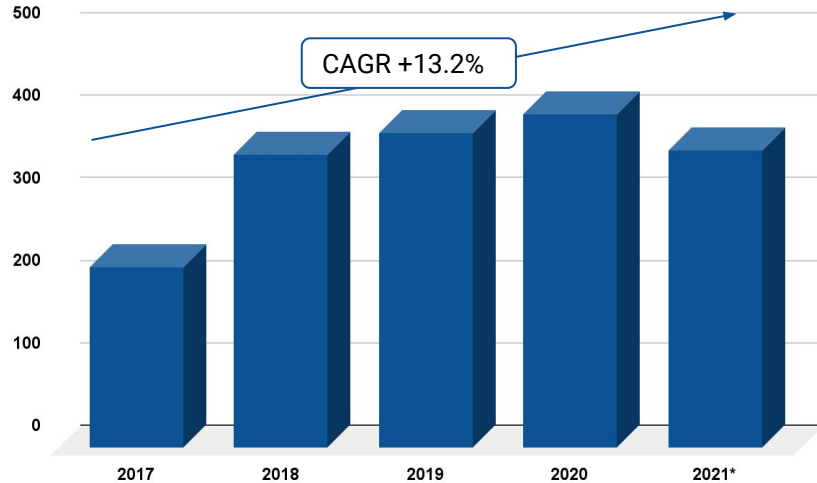
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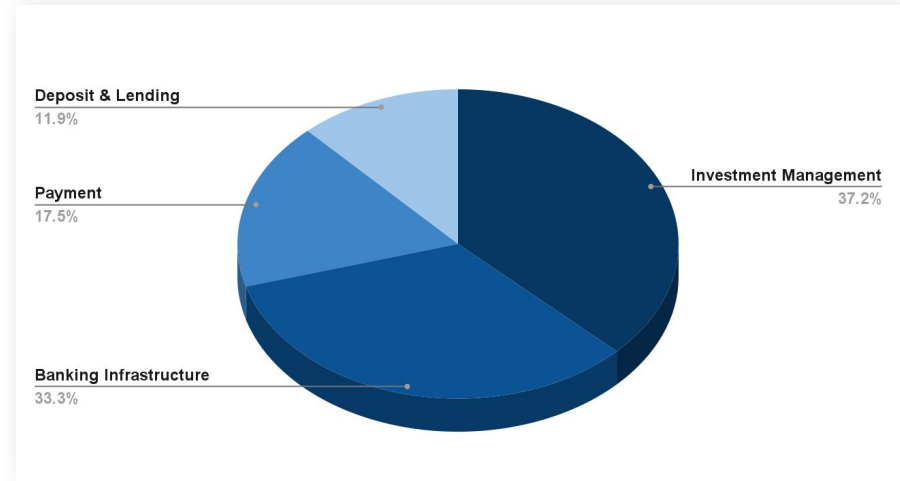
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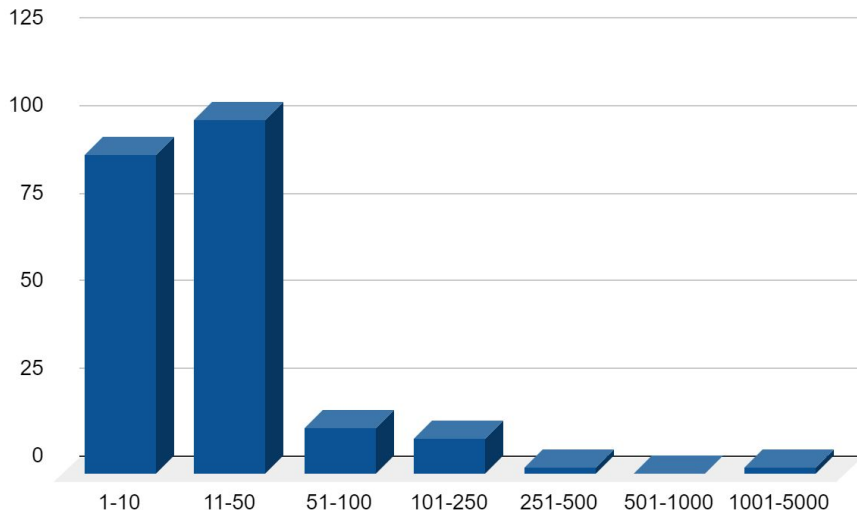
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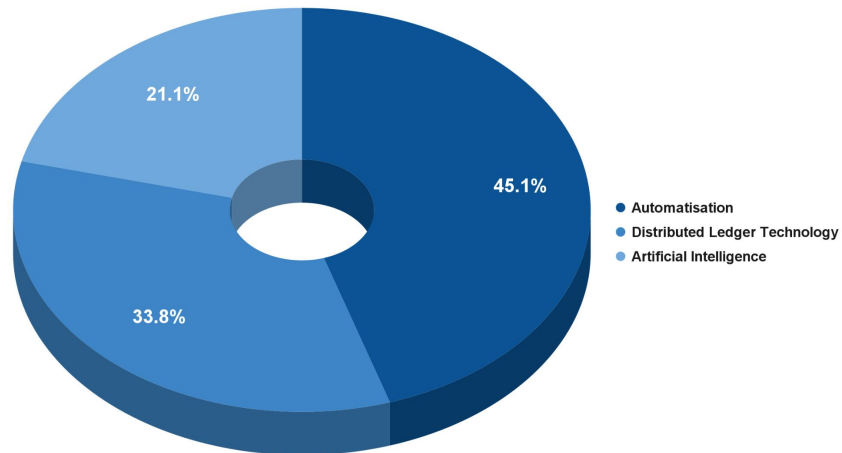


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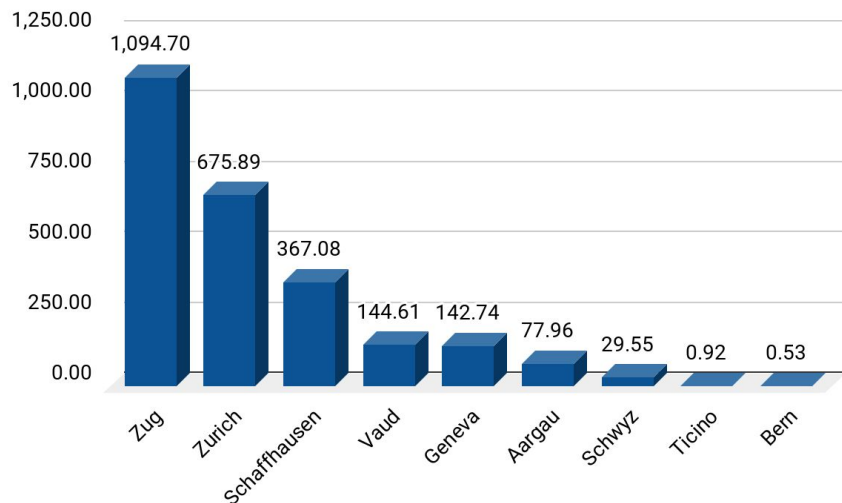
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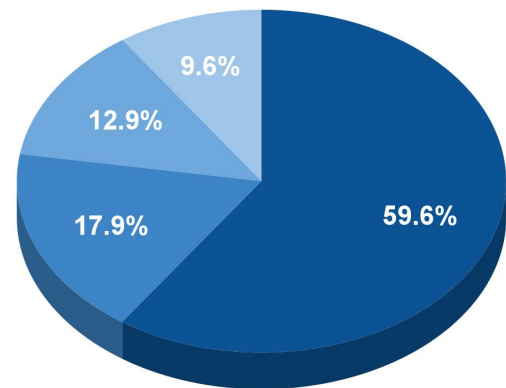
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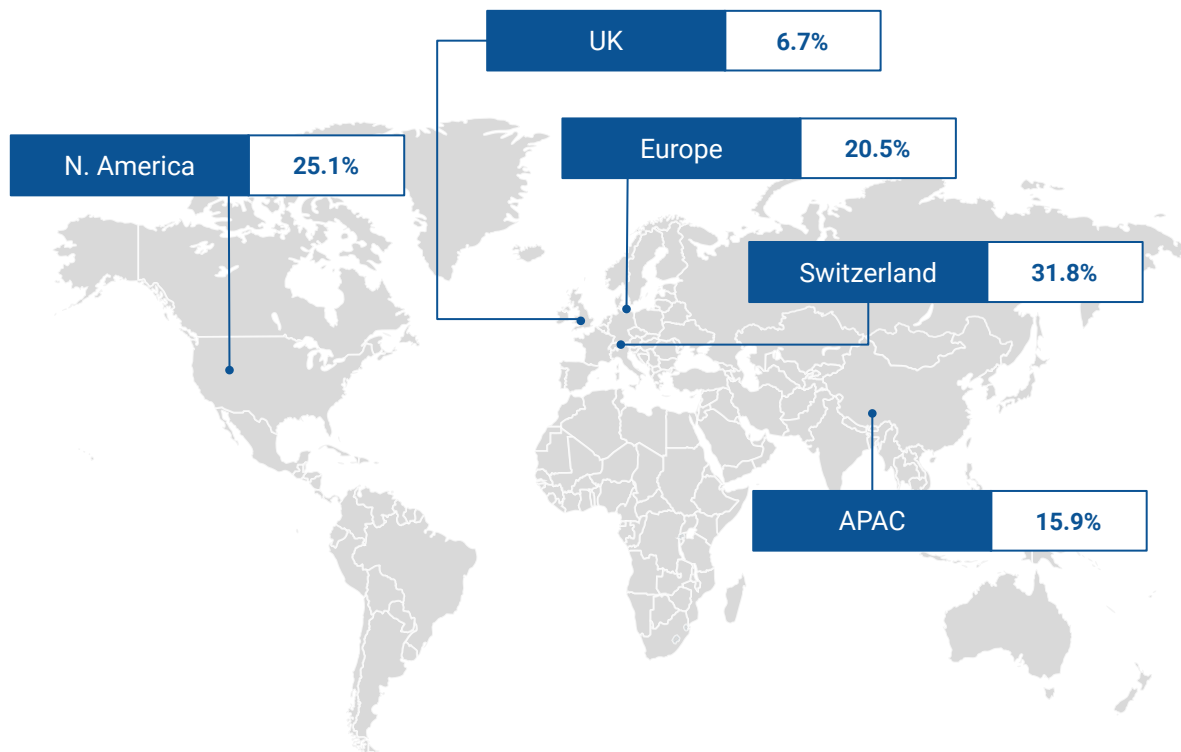


● Banking Infrastructure ● Payment ● Investment Management ● Deposit & Lending

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FinTech Investors in Switzerland

Investors: Regional Proportion



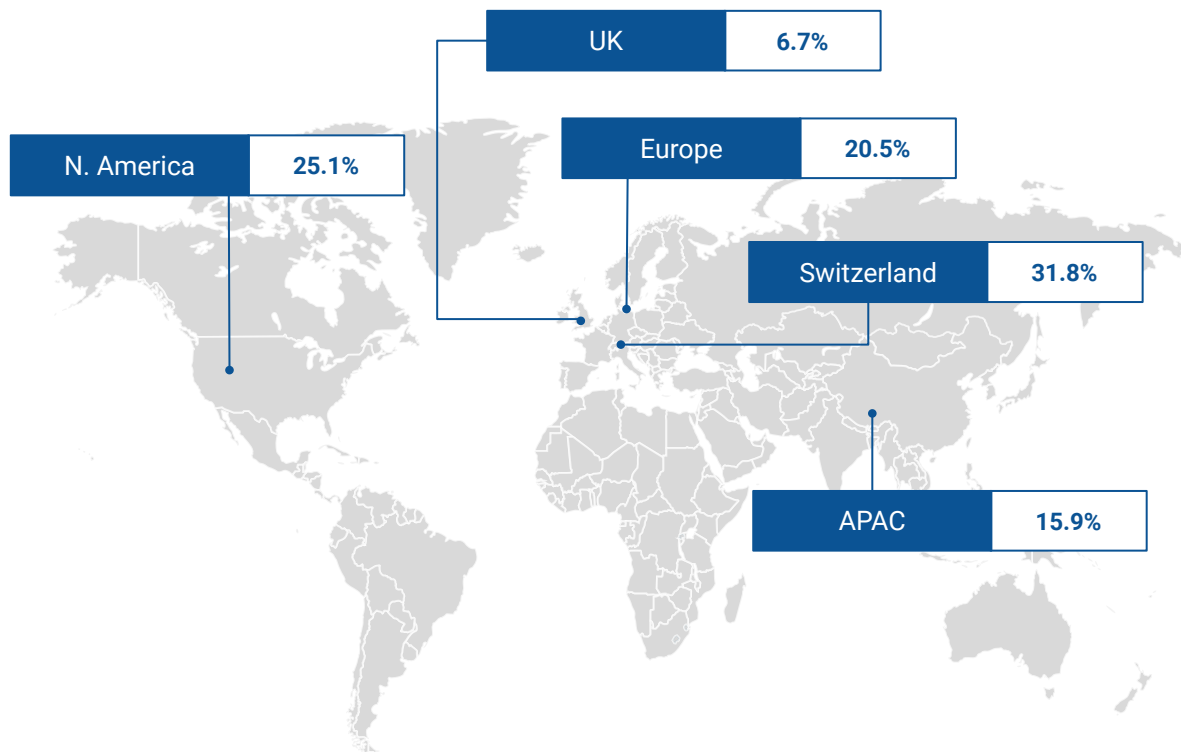
As with the most sectors of the Swiss economy, the FinTech sectors show the inherent prevalence of the Swiss investors' share in terms of investor representation. Currently approximately 32% of investment into the Swiss FinTech companies comes from the Swiss-based investors.

The two other significant regions that house the investors are North America and Europe (excluding Switzerland and the UK) and hold second and third place, with 25.1% and 20.5% share of investors, respectively. In North America, the most prevalent country of origin of the investors is the USA while in Europe, the majority of investors come from Germany.

The rest of the investment comes from the Asia and Pacific (APAC) region and from the UK. The APAC region shows the 15.9% share of investors, mostly coming from China. While the UK is a single-country region, it has managed to show a respectable share of 6.9% of total investors.

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Leading FinTech Companies in Terms of Investments (in CHF* M)

1	Sirin Labs	367
2	Status Research and Development	182
3	Open Mineral AG	171
4	Metaco	144
5	Cortex	138
6	SEBA Bank	116
7	Imburse	110
8	Ledgy	92
9	ShapeShift	86
10	Bitcoin Suisse AG	85

11	Komgo	80
12	Tradeplus24	79
13	Yokoy	78
14	Kontera	78
15	Numbrs	74
16	DIA	55
17	Liquity	55
18	Taurus Group SA	50
19	Nexo	48
20	Sonect	37

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FinTech Start-ups and Hubs in Switzerland

FinTech Start-ups



Avaloq is an international FinTech company that digitalises the automation of financial services industry



HQLA is a financial technology innovation firm that leverages R3's distributed ledger technology.



Alpian is a financial services firm that combines banking services, personal wealth management, and tailored investment products in one app.



BRD designs, develops, and markets financial software.



NetGuardians is a leading FinTech company recognised for its anti-fraud and risk mitigation solutions.

Hubs and Think Tanks



Swiss Finance + Technology Association

Swiss Finance + Technology Association (SFTA) is fostering the development of the Swiss FinTech ecosystem.



Greater Zurich Area is one of the leading FinTech hubs in Europe and worldwide.



Swiss FinTech Innovations is an independent association of Swiss financial institutions committed to drive collaboration and digital innovation in the financial services industry.



SWISSFINTECHLADIES aims to promote science and networking with companies in the finance, tech, FinTech, and blockchain industry.



SWISS FINTECH is Switzerland's nonprofit FinTech association and community for FinTech, entrepreneurship, and digitalisation.

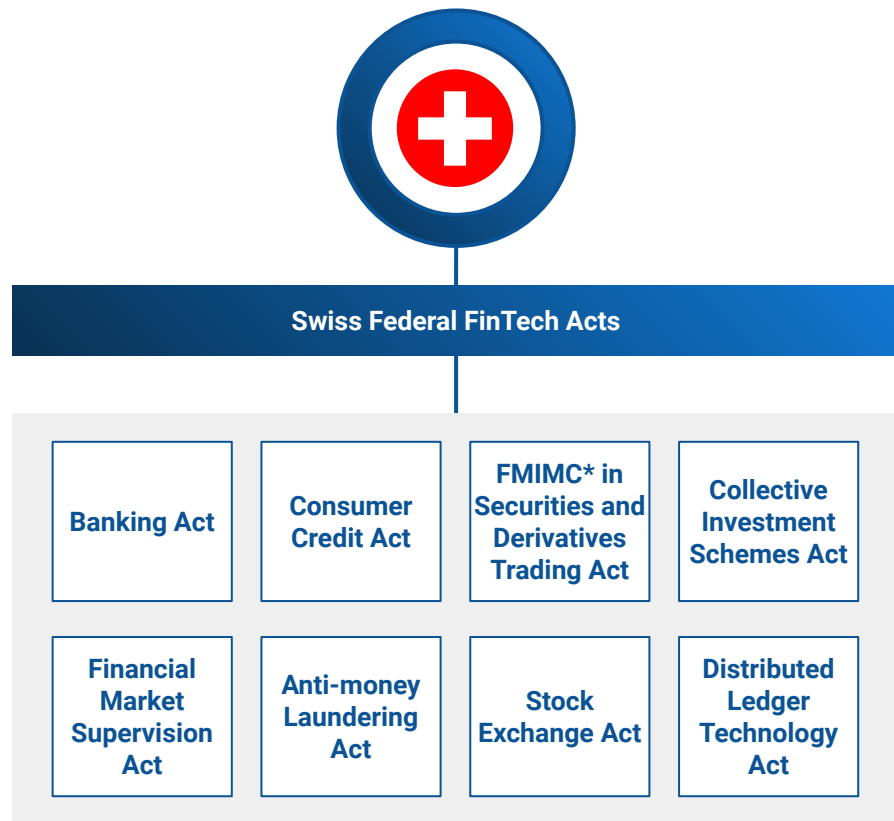
FinTech and Government Strategies

The Swiss legal framework, regulated to the activity of the FinTech operates and the sector itself, consists of a number of federal acts. These acts have been implemented through ordinances enacted by the Federal Council and the regulator, the **Financial Market Supervisory Authority (FINMA)**, which has issued further guidance. In addition, selfregulation may apply.

FINMA is tasked with regulating and supervising the financial markets and their participants. Overall it is tasked with authorisation, supervision, documentation, and enforcement of all activities on the said markets that would require additional approval. During 2020, the Authority has conducted more than 100 preliminary investigations into over 140 FinTech organisations, adding them to the warning list.

Swiss FinTech markets also maintain a number of selfregulatory options, with the most common being their own operations subjected to the Anti-Money Laundering Act, which, in turn, makes the said operations unsupervisable by FINMA.

Overall, the Swiss law is rather technology-neutral and principle-based, therefore the Swiss FinTech companies operate rather freely and without any additional issues coming for the governmental regulations. The legislation is focused mostly on banking and securities, anti-money laundering and data protection when dealing with the FinTech sector.



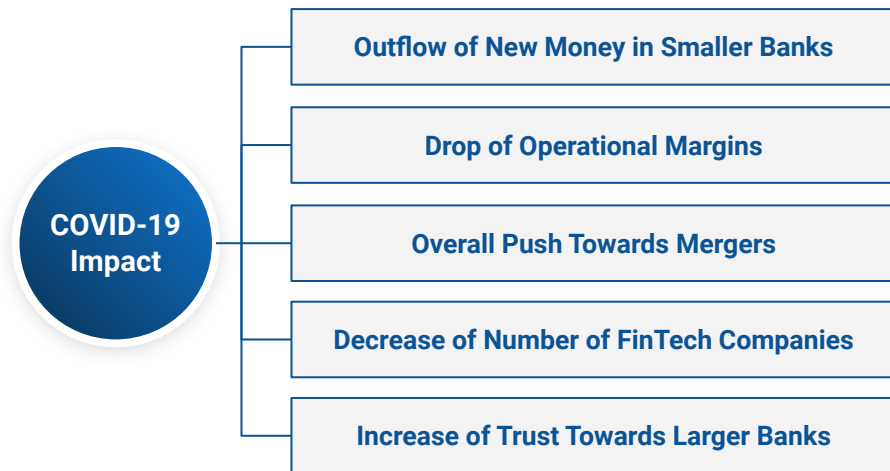
*Financial Market Infrastructure and Market Conduit

FinTech Industry in Switzerland During COVID-19

The year 2020 has thrown humanity's focus into COVID-19, yet in general, the Swiss FinTech sector got off relatively lightly, compared to the other industries. The Swiss banks – small, mid-sized, and large – have shown high levels of stability during the pandemic. At the present time, Switzerland sees the COVID-19 crisis as an opportunity to shift away from expensive cash-based systems and to create new systems that do not rely on banks and traditional money transfer operators.

There were large inflows of the net new money, recorded by the larger Swiss banks, with more than CHF 10 million in assets under management, achieving an increase of 3.4%. At the same time, the smaller banks have experienced an outflow of 2.8% during the pandemic.

While the general impact of the highest point of the pandemic could be considered rather mitigable for the Swiss FinTech sector, there were still major consequences for the industry. A number of smaller banks could not handle the pressure of COVID-19 limitations and were absorbed by the other companies. The pandemic has also resulted in a drop of operational margins of the FinTech companies. The operating margin of private banks on average fell to 82 basis points. The approximate drop for a larger company equates to approximately 11 points to the basis of 67. Smaller and medium-sized banks, on the other hand, were able to maintain their margin at around 90 points.



Swiss FinTech Companies That Grew During COVID-19

loanbox.
instimatch global
TRADEPLUS 24

additiv
APIX
Numbrs

Trends and Obstacles for FinTech in Switzerland

Trends for FinTech in Switzerland in 2021

Growth Slowdown

While the sector has shown growth in the previous years, the drop of the number of companies in 2021 shows that a growth trend is slowing down.

Conditional Deterioration

The attractiveness of Switzerland's general environment for FinTech companies tended to deteriorate in recent years in comparison to other leading FinTech hubs.

Open Banking

Due to the Swiss market-driven Open Banking, various platforms and initiatives have emerged that enable the secure and standardised exchange of data and services.

Increase of FinTech Digitalisation

A large proportion of volumes is still handled by traditional financial institutions and individual incumbent FinTech companies, yet there is a growth of digitalisation processes.

Growth of Swiss FinTech Rankings

Venture capital activity is the most relevant indicator with the highest significance in the FinTech hub ranking, and Switzerland is known for low difficulty for funding, leading to higher attractiveness.

Trending Technologies in Swiss FinTech Sector



E-KYC



Mobile First



AI and Machine Learning



Big Data



Cross-Industry Integration

Obstacles for FinTech in Switzerland

Data Security

The popularity of cashless transactions has helped FinTech companies flourish in recent years. This has also caused a steep rise in fraudulent transactions and scams. It is no surprise that data security has gone on to the top of the agendas of businesses, offering their products online. The B2B FinTech players must go an extra mile to offer additional security measures to their clients; e.g., data encryption, biometric authorisation tools, and real-time notifications to ensure the safety of customer data and critical company information.

Regulation Increase

The Swiss FinTech sector has remained relatively unaffected by different forms of regulation, with only a handful laws and regulatory organisation monitoring. Yet there is a possibility of introduction of new laws and regulations that would restrict the rules of the Industry and, therefore, constrict further growth.

Growth Slowdown

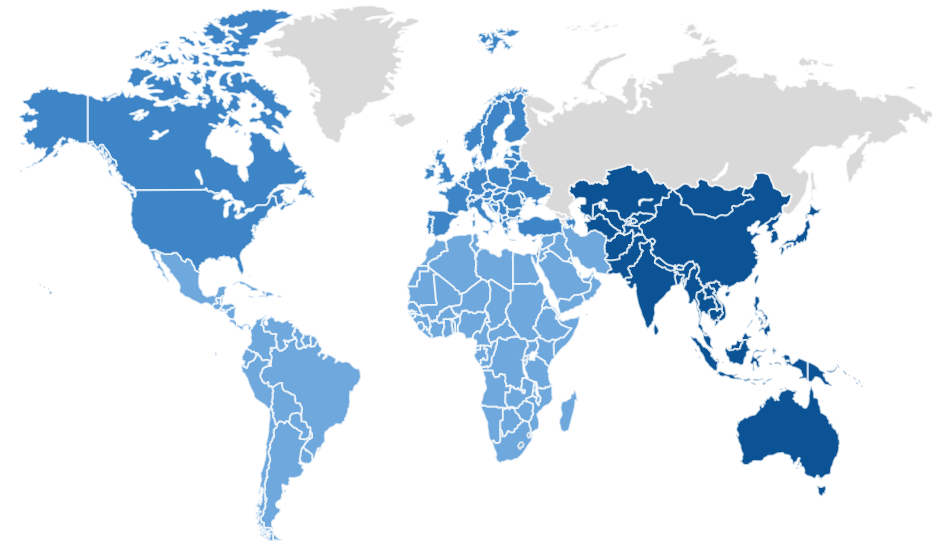
While the Swiss FinTech sector has continued to grow over the past year, a closer look suggests that certain segments are showing signs of stagnation. Other indicators showing a slowdown in the Swiss FinTech market include a decline in the companies' overall median capitalisation and a stagnant median number of employees. According to statistics, Swiss FinTech companies have begun to overtake traditional financial companies and have grown by 7% annually.

COVID-19 Pandemic

While the COVID-19 pandemic effect on Swiss FinTech sector was relatively light, the issues it has brought could still affect further development and growth of the industry. There was a shift of trust towards the larger banks while the smaller ones had a relative loss of it. Apart from that, the smaller banks have experienced an outflow of net new money during the pandemic.

Predictions of the Global FinTech Market Development

FinTech Market-Growth Rate by Region, 2021-2026



High

Mid

Low

Key Takeaways

The global financial services market is projected to reach \$26.5T by 2022. (The Business Research Company, 2020)

There is projected funding of over \$425.5M for blockchain start-ups in Europe in the next 12 to 18 months. (Crunchbase, 2021)

The global FinTech market is expected to grow at a CAGR of 23.58% from 2021 to 2025. (Research and Markets, 2020). Blockchain has the potential to save banks more than \$27B by 2030.

Peer-to-peer (P2P), or digital lending, another segment of FinTech, was worth \$43.16B in 2018 and is expected to rise to \$284.81B in 2026, with a CAGR of 26.6%. (Reports and Data, 2019)

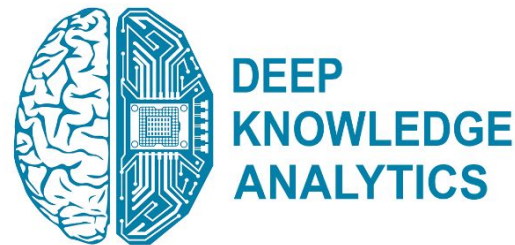
About Deep Knowledge Analytics

[Deep Knowledge Analytics](#) is a DeepTech-focused agency producing advanced analytics on DeepTech and frontier-technology industries, using sophisticated multidimensional frameworks and algorithmic methods that combine hundreds of specially designed and specifically weighted metrics and parameters to deliver sophisticated market intelligence, pragmatic forecasting, and tangible industry benchmarking.

It is an analytical subsidiary of [Deep Knowledge Group](#), an international consortium of commercial and nonprofit organisations focused on the synergetic convergence of DeepTech and Frontier Technologies (AI, Longevity, MedTech, FinTech, GovTech), applying progressive data-driven Invest-Tech solutions, with a long-term strategic focus on AI in healthcare, Longevity, and Precision Health, and aiming to achieve positive impact through the support of progressive technologies for the benefit of humanity via scientific research, investment, entrepreneurship, analytics, and philanthropy.

Deep Knowledge Analytics specialises in conducting special case studies and producing advanced industry analytical reports on the topics of Artificial Intelligence, GovTech, Blockchain, FinTech, and Invest-Tech. It has produced a number of comprehensive analytical reports in coordination with the [UK All-Parties Parliamentary Groups on AI](#) and on [Blockchain](#), including its 'AI in UK Landscape Overview 2018' and 'Blockchain in UK Landscape Overview 2018', unprecedented in their scope and length and collectively more than 3,000 pages. The company has also recently deployed advanced interactive online IT-platforms that feature dynamic mindmaps and filterable, customizable databases updated with new industry developments in real-time.

Deep Knowledge Analytics will continue to expand the scope, depth, and topics covered by its analytical reports on frontier technology-driven industries to develop the next iterations of their analytical frameworks with a wider breadth and depth of metrics and overall analytics, to apply efficient methods to cross-sector analysis between different industries, and to apply both existing and new analytical frameworks to the design of the new InvestTech solutions (novel investment technologies and strategies relevant for the third decade of the 21st century), which is the only relevant way to implement the long-term strategic vision of Deep Knowledge Ventures.



Swiss Longevity Valley – Summary

I.

Swiss Government Engagement on National Longevity Development Plans and Initiatives

Proactive engagement with Swiss government agencies and members of the Swiss Parliament to establish a framework for a National Swiss Longevity Development Plan and Industrial Strategy to grow Switzerland's Longevity ecosystem to scale and enable extension of the national Health-Adjusted Life Expectancy.

II.

Cross-Sector Dialogue with All Major Longevity Industry Players

With a focus on cross-sector dialogue, projects, and initiatives spanning government, industry, academia, and other relevant spheres of activity, Swiss Longevity Association aims to achieve a maximum level of synergy and convergence, growing every aspect of Switzerland's Longevity ecosystem to scale.

III.

Coordinated Development of AI Centres for Longevity to Enable the Shift from Treatment to Prevention

Though the intensive application of AI to advanced biomedicine, Switzerland can lead the world in Precision Health, utilising the latest innovations in AI, Longevity, Biomarkers of Ageing and Advanced Biomedicine to become nation leading the world in preventive, personalised, and precision health care for its citizens.

IV.

Support of Progressive Longevity Financial Reform to Neutralize Economic Burden of Ageing Population

Swiss Longevity Association will work alongside large Swiss financial institutions, including pension funds, insurance companies, private wealth banks, and other relevant entities to roadmap initiatives and policy proposals to turn the problem of ageing population into the economic opportunity of Healthy Longevity.

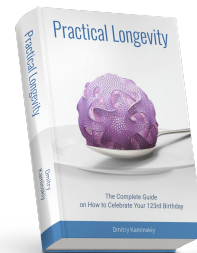
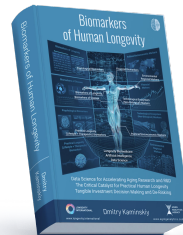
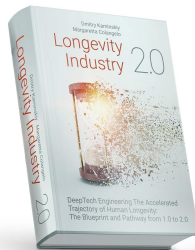
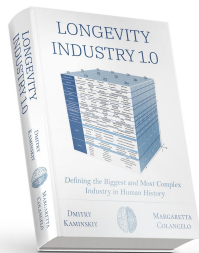


Stay on Top of the Latest Intelligence

Stay on top of the latest information about Switzerland's DeepTech Industry with our analytical case studies and interactive IT platforms.



Deep Knowledge Group: Books

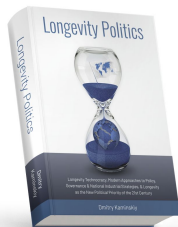


Longevity Industry 1.0
2010-2020: Evolution of the Longevity Industry from Zero to 1.0

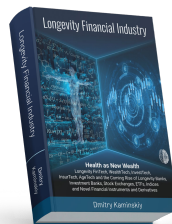
Longevity Industry 2.0
2020-2025: DeepTech Engineering The Accelerated Trajectory of Human Longevity – The Blueprint and Pathway from 1.0 to 2.0

Biomarkers of Human Longevity
The Critical Catalyst for Practical Human Longevity, Tangible Investment De-Risking, and Accelerated Ageing Research and Longevity R&D

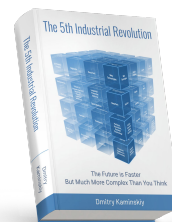
Practical Longevity
Practical, Market-Ready Tools, Approaches and Frameworks for Optimizing Personal, Practical, Healthy Human Longevity



Longevity Politics
2021-2030: The Rise of Longevity Politics, and the Solidification of Longevity as the New Political Priority of the 21st Century



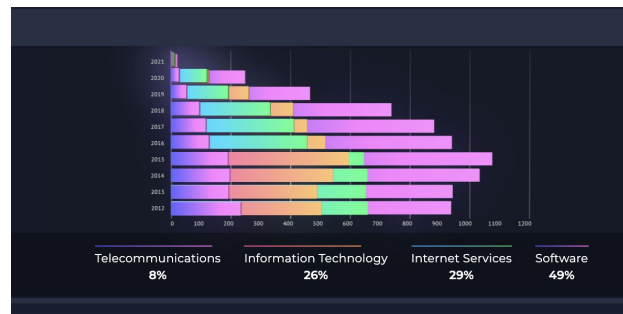
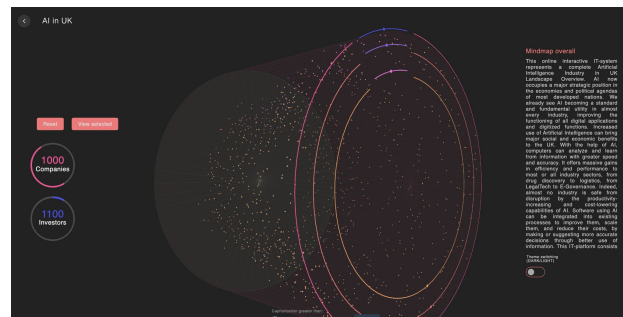
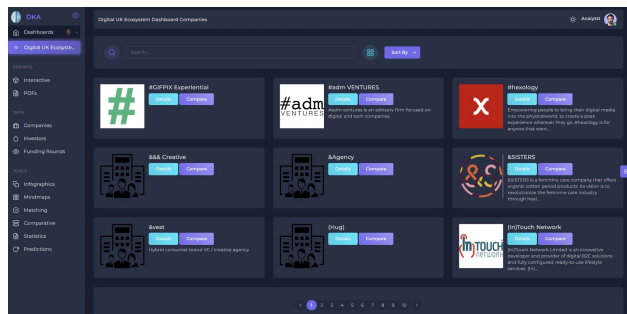
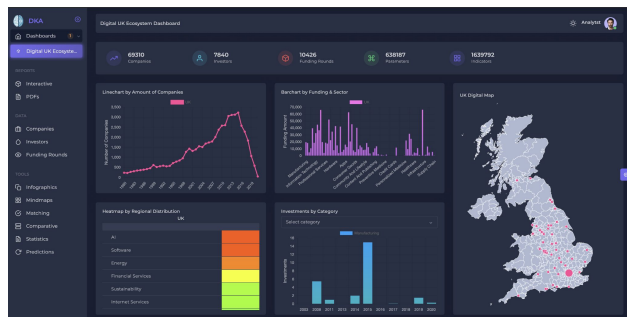
Longevity Financial Industry
Health as New Wealth, Engineered Solutions to Bridge the Longevity Liquidity Gap, and the Rise of Longevity Investment Banks, Stock Exchanges and Financial Instruments



The 5th Industrial Revolution
2030-2035: Defining, Forecasting, Optimizing and De-Risking the Accelerated Trajectory of Progress Toward the 5th Industrial Revolution

DKA Digital Platform Concept

The Digital platform provides an opportunity to monitor digital industry growth in dynamics. In addition, the platform presents geographical data analytics visualisations, advanced 3D MindMaps, and charts. Overall, it maintains a unique method in market research and forecasting, as well as trend visualisation.



Longevity Governance Big Data Analytics Dashboard

Market Intelligence

Longevity Governance Market Intelligence

Full Analysis

Interactive Mindmaps

SWOT Analysis

Dynamic Charts

Full Big Data Analysis



View More

Dashboard Parameters

DATA POINTS

11984

PARAMETERS

240

REGIONS

50

LAYERS OF FRAMEWORK

6

DYNAMIC CHARTS

100

SWOT ANALYSIS PROFILES

50

SWOT Analysis



View More

Longevity Governance Market Intelligence

Pre-Subscribe for Beta

COVID-19 Dashboard

3D Visualization

Search Engine

Longevity Governance Search Engine

Benchmarking Charts

Major Trends

Practical Recommendations

Big Data Framework

National Healthy Longevity Interactive MindMaps

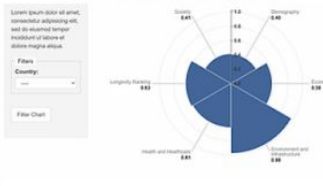


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Longevity Progressiveness 3D Visualization



Longevity Progressiveness Benchmarking Charts

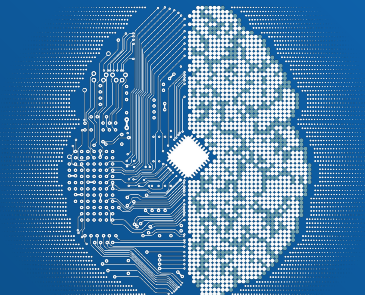


View More

Longevity Governance Search Engine

Health-Adjusted Life Expectancy (HALE) Gap and Life Expectancy

Health-Adjusted Life Expectancy (HALE) Benchmarking



Link to the Report: www.dka.global/fintech-in-switzerland-landscape-overview-2021

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