

Sweden Information Technology Report Q1 2016

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Abstracts

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BMI View: The Swedish IT market has a bright outlook for a developed market due to a supportive economic environment and advanced composition of the enterprise segment. We believe this will drive growth in spending on new technologies such as advanced cloud computing services, and software and services required for the Internet of Things. We also highlight the potential for Sweden to be a leading adopter of labour saving smart automation and assistant technologies as a result of high labour costs and its status as a leading innovator, but this trend would be concentrated in the latter years of our forecast. Meanwhile, despite maturity, we consider there to be opportunities in the retail market where strong private consumption growth has the potential to trigger premium device upgrades over the medium term. BMI forecasts a CAGR of 4.3% over 2015-2019 for the IT market as a whole.

Latest Updates & Industry Developments

Computer Hardware Sales: Forecast to increase from SEK22.8bn in 2016 to SEK24.9bn in 2019. The maturity of the market with high penetration even for tablets means the boom has passed, but income growth trends and a preference for premium products will support growth.

Software Sales: Forecast to increase from SEK38.7bn in 2016 to SEK42.6bn in 2019. Software spending outlook is bright across several verticals in Sweden, with advanced real-time enterprise applications expected to exhibit the strongest growth.

IT Services Sales: Forecast to increase from SEK70.3bn in 2016 to SEK82.2bn in 2019. Sweden is a leading European market for cloud service adoption and

further growth will drive IT service spending higher over the medium term, while the Internet of Things adds to the growth outlook.

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