

Slovenia Information Technology Report Q2 2016

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Abstracts

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BMI View: We continue to hold a positive outlook for the Slovenian IT market in our Q216 report update. We retain the opinion that Slovenia represents a lucrative IT market in Central and Eastern Europe, with high incomes levels to support the strong per capita spending. Nevertheless, growth in recent years has been hit by challenging economic conditions. From 2016 onwards, our forecast envisions a more conducive macroeconomic environment reflected in higher consumption growth rates, as well as a marked improvement in business sentiment. We are forecasting total IT spending growth at a CAGR of 3.9% over 2016-2020. We identify several areas of opportunity for vendors, particularly enterprise cloud solutions in the services and software segments. Slovenian enterprises have shown willingness to take advantage of the cost savings offered by cloud computing, and the country's proximity to major data centre hubs offers great potential for growth over the medium term.

Latest Updates And Industry Developments

Computer Hardware: EUR345mn in 2016 to EUR380mn in 2020, a compound annual growth rate (CAGR) of 2.3% in local currency terms. A stronger economic environment will enable vendors to tap into first-time buyer opportunities, particularly in the tablet and hybrid notebook markets.

Software: EUR152mn in 2016 to EUR180mn in 2020, a CAGR of 4.5% in local currency. Enterprise software demand is strengthening as the economic outlook improves and businesses seek to upgrade, with cloud software delivery models expected to outperform by a wide margin and deepen the small and medium-sized enterprise market through lower-cost solutions.

IT Services: EUR229mn in 2016 to EUR288mn in 2020, a CAGR of 5.9% in local currency terms. Underlying demand for cost-cutting products such as cloud computing and outsourcing in an environment of low enterprise confidence will ensure services sales continue to grow over the medium term.

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