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Abstracts

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BMI View: A stronger economic environment should boost the growth dynamic in Slovenia's IT market over the medium term as households recover lost purchasing power and enterprise sentiment strengthens.

We consider the enterprise software and services markets to be positioned for the strongest growth as investment in cloud and data analytics solutions picks up - while the hardware segment has a more mixed outlook. Purchasing power growth is a positive, but there is potential for PC sales to be cannibalised by smartphones where the use case for small-screen tablets is being rapidly undermined by phablets. Nonetheless, we expect all three segments to record faster growth from 2016 and we forecast total IT spending growth at a CAGR of 4.0% over 2016-2020.

Latest Updates And Industry Developments

Computer Hardware: EUR360mn in 2016 to EUR397mn in 2020, a compound annual growth rate (CAGR) of 2.5% in local currency terms. Upside from stronger consumer outlook limited by potential for PC spending to be cannibalised by increasingly powerful smartphones that become more common as standalone devices.

Software: EUR154mn in 2016 to EUR183mn in 2020, a CAGR of 4.5% in local currency. Large enterprises will invest in data analytics, while the SME market should get a broad boost from an increased supply of cloud solutions.

IT Services: EUR228mn in 2016 to EUR286mn in 2020, a CAGR of 5.8% in local currency terms. Core market will see modest growth, but there is significant

upside due to cloud computing and Internet-of- Things-solution spending growth potential.

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