

# Slovenia Information Technology Report Q3 2016

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## Abstracts

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BMI View: Domestic recession and then euro depreciation against the US dollar in 2015 made conditions in Slovenia's IT market challenging for vendors, particularly in the hardware segment. The outlook is however brighter over the medium term now the economy has recovered, and this will re-emphasise Slovenia's position as a lucrative IT market in Central and Eastern Europe where high incomes levels and deferred spending from recent years should create opportunities for hardware vendors. Meanwhile, Slovenian enterprise spending on cloud services is another growth area and the country's proximity to major data centre hubs offers great potential for growth over the medium term. We are forecasting total IT spending growth at a CAGR of 4.0% over 2016-2020.

### Latest Updates And Industry Developments

Computer Hardware: EUR345mn in 2016 to EUR381mn in 2020, a compound annual growth rate (CAGR) of 2.5% in local currency terms. After several years of weak performance when domestic economic conditions and euro depreciation hit spending, we expect a return to growth as confidence returns, and a boost from deferred purchases.

Software: EUR152mn in 2016 to EUR180mn in 2020, a CAGR of 4.3% in local currency. Enterprise application spending should pick-up, and cloud software delivery models expected to outperform by a wide margin, particularly among SMEs.

IT Services: EUR229mn in 2016 to EUR289mn in 2020, a CAGR of 6.0% in local currency terms. Underlying demand for cost-cutting products such as cloud

computing and outsourcing will ensure services sales outperform over the medium term.

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