

Sweden Information Technology Report Q2 2016

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Abstracts

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BMI View: Despite its developed market status, we have an upbeat perspective on Sweden's IT industry, owing to the presence of a supportive economic environment and advanced composition of the enterprise segment. These market characteristics are expected to 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. However, this trend would be concentrated in the latter years of our forecast. Meanwhile, despite its maturity, we believe 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 4.2% over 2015-2020 for the IT market as a whole.

Latest Updates And Industry Developments

Computer Hardware Sales: Forecast to increase from SEK22.8bn in 2016 to SEK25.5bn in 2020. 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 SEK43.8bn in 2020. 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 SEK86.2bn

in 2020. 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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