"THE SWEDISH MARKET"
MARKET SIZE

- >11,000 companies
- Turnover 2016: 73.7 billion SEK
- Employees 2016: 60,500
- Growing market: 8% turnover, 6% employees

Growing market
STAFF SHORTAGE

3 of 4 need to recruit. Shortage corresponds to 5600 persons. It’s a "bottleneck" for growth!

Salary cost increases. 4-5% since 2014.
ORDER STOCK INDEX

Strong increasing trend since 2013, 2017 = record year!
PRICE DEVELOPMENT

Net = increased – decreased (average hourly rates). Positive trend since 2015.
BILLING RATIOS

Increasing trend. Main tool to balance salary cost increases.
PROFIT MARGINS (EBT)

Vinstmarginaler i de 300 största konsultföretagen

Vinstmarginal

- Arkitektföretag
- Teknikkonsultföretag
- Industrikonsultföretag

%
Fortsatt optimism inför 2018! Nettotalen långt över noll.
GLOBALIZATION

- Globalization speeded up on the Swedish market after 2008
  - Until then it had remained fairly isolated and mainly a "Swedish concern"
- In 2007, 9 companies on top-300 were foreign owned
  - 3.9 Billion SEK turnover
  - 4,160 employees
  - 13% of the industry in Sweden
- In 2017, 41 of top-300 companies were foreign owned
  - 15.8 Billion SEK
  - 13,100 employees
  - 21% of turnover & 22% of employees of total industry in Sweden

Foreign presence quadrupled in 10 years
GLOBALIZATION

- Swedish groups in 2016 had (including pro forma-acquisitions in 2017)
  - 16.9 billion SEK turnover abroad in foreign subsidiaries
  - 15,800 employees abroad

- New/changed industry since 2008:
  - More competition & price pressure
  - Consolidations
    - Increased after 2008
    - Large become larger
    - New challenges require new business models and strategies

- New (changing) industry
SVENSKA TEKNIK & DESIGNFÖRETAGEN
– INNOVATIV DESIGN FÖR SMARTA SAMHÄLLEN

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POLITIK
INFRASTRUCTURE

- National plan: several large projects (train Göteborg-Borås, 4 tracks Stockholm-Uppsala, higher capacity Lund-)
- Political negotiations regarding high speed network
- Election this fall
FORENINGEN
CONTRACTS - ABK

- Tough discussions between buyers, contractors and consultants
- Currently: revision of AB/ABT
- ABK expected to be revised in 2-4 years (start)
- More focus from our side: process of hiring expertise to the STD staff
CHANGE OF ROLE FOR STD


- Will remain within Almega, but will be more active in work on wages, salaries etc with our unions

- Hopefully: a new name this fall
VÅRA MEDLEMMAR SKAPAR INNOVATIV DESIGN FÖR SMARTA SAMHÄLLEN

- Forskningscentrum med världens mest kraftfulla neutronkälla
- Yteffektiva ungdomsbostäder
- Förpackningskapacitet
- Ny tunnelbana
- Pålitlig reservkraft
- Sveriges största järnvägsprojekt
- Yteffektiva ungdomsbostäder