



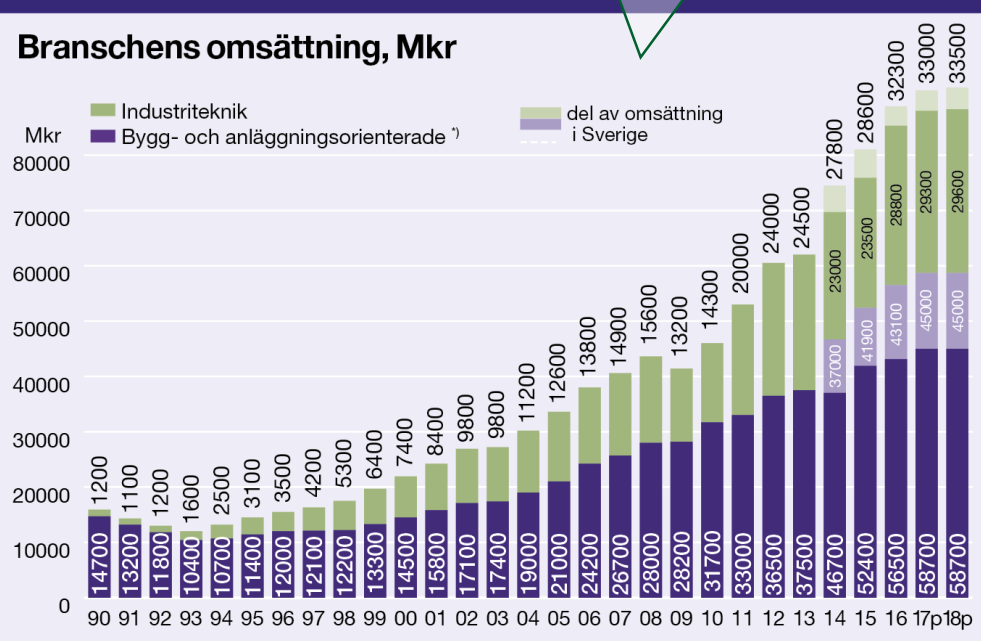
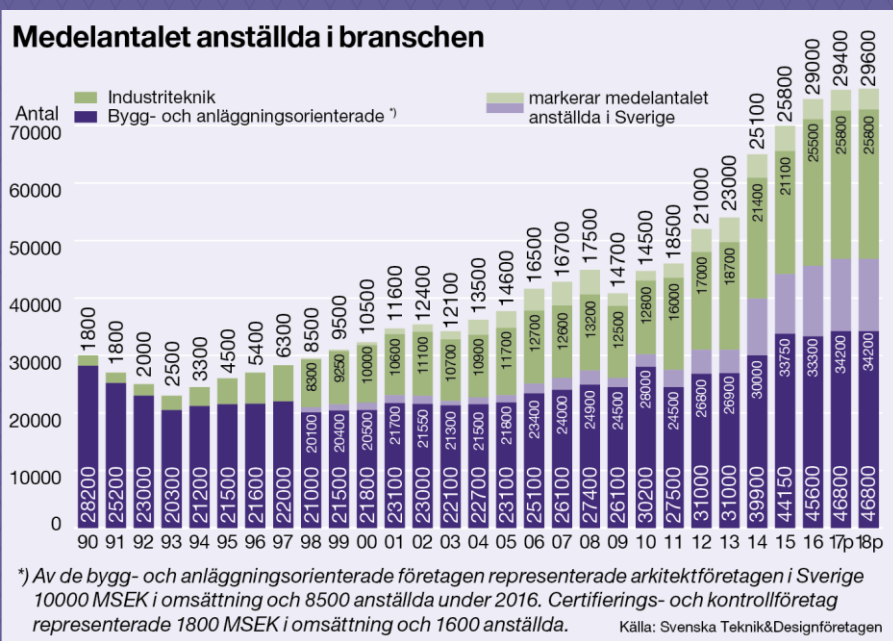
”THE SWEDISH MARKET



RINORD JUNE 2018

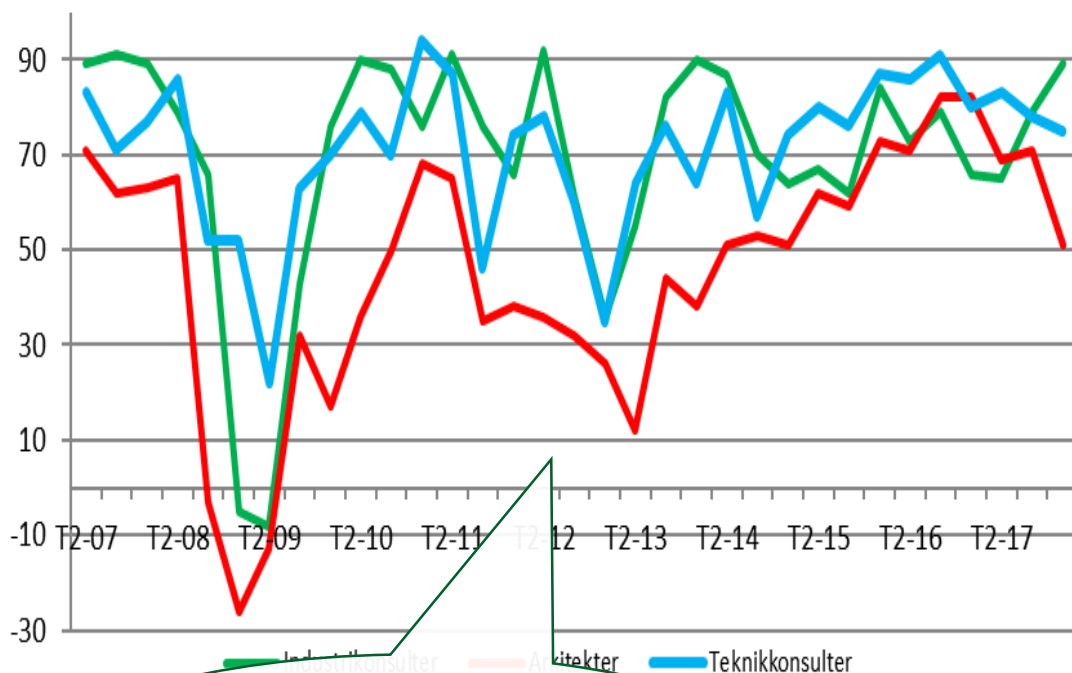
MARKET SIZE

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



STAFF SHORTAGE

Förväntningar på personalstyrkans utveckling om 6 månader - netttotal



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

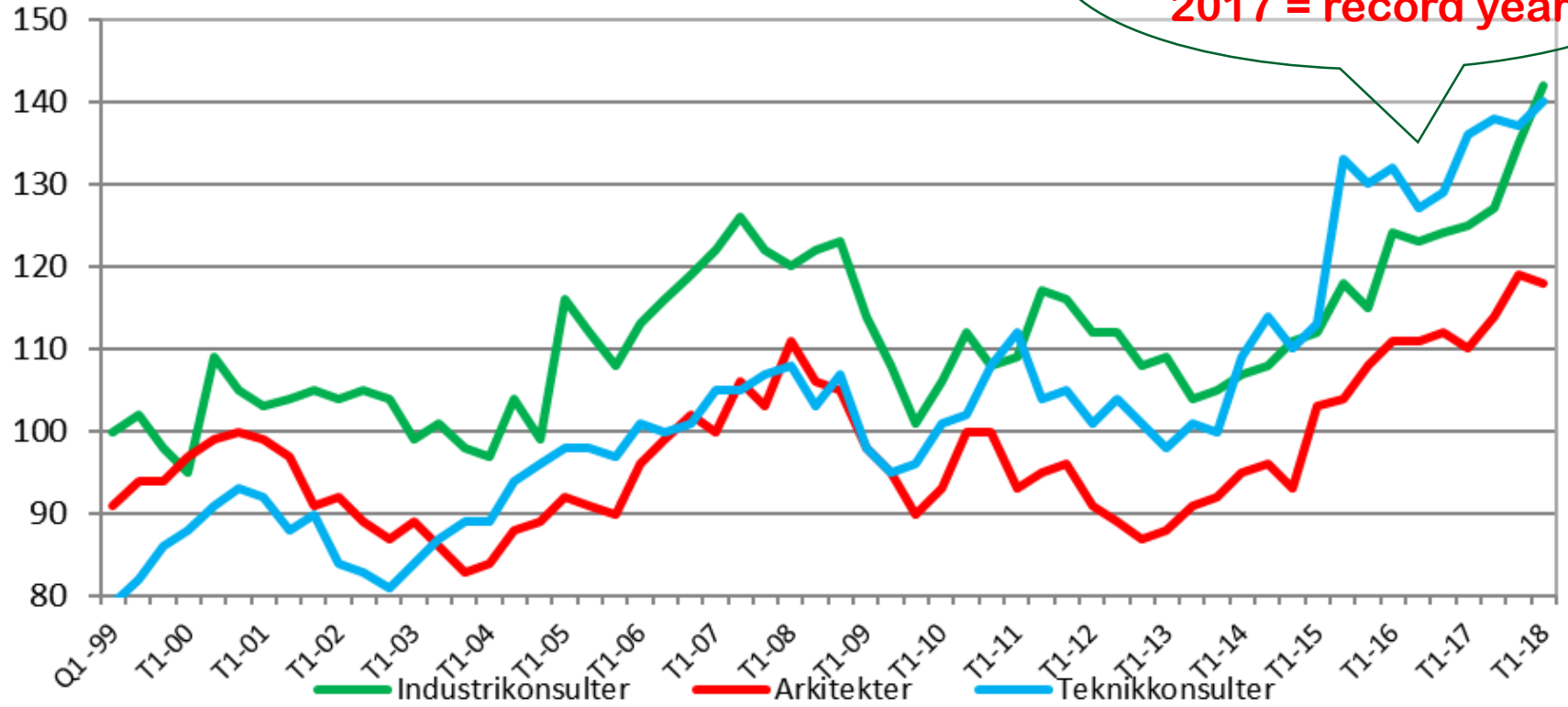
Lönekostnadsökning
per årsarbete



**Salary cost
increases. 4-
5% since
2014.**

ORDER STOCK INDEX

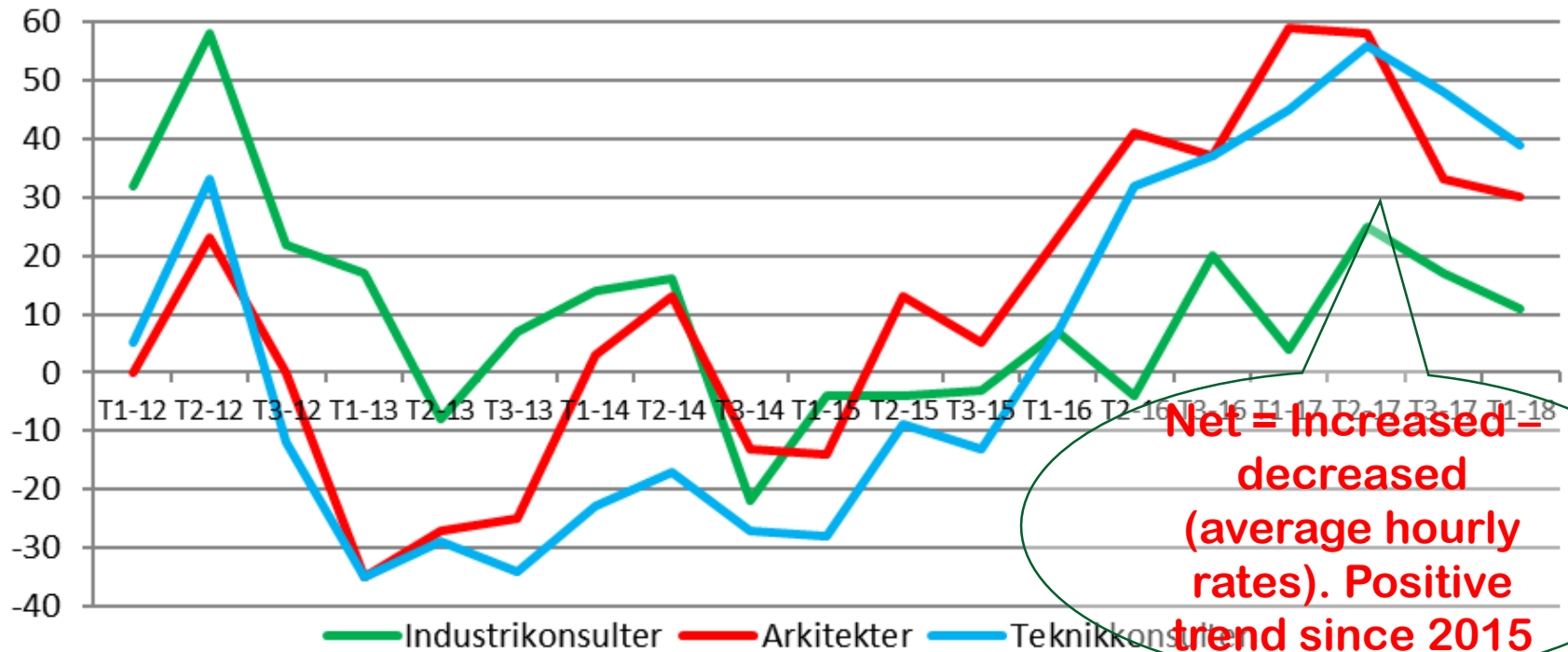
Utveckling orderstocksindex



Strong increasing trend since 2013, 2017 = record year!

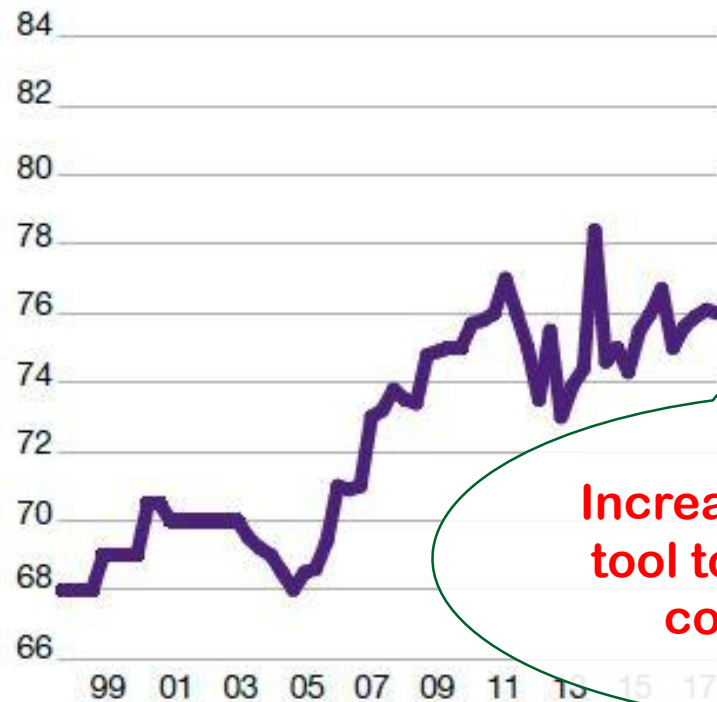
PRICE DEVELOPMENT

Prisbildens utveckling - netttotal



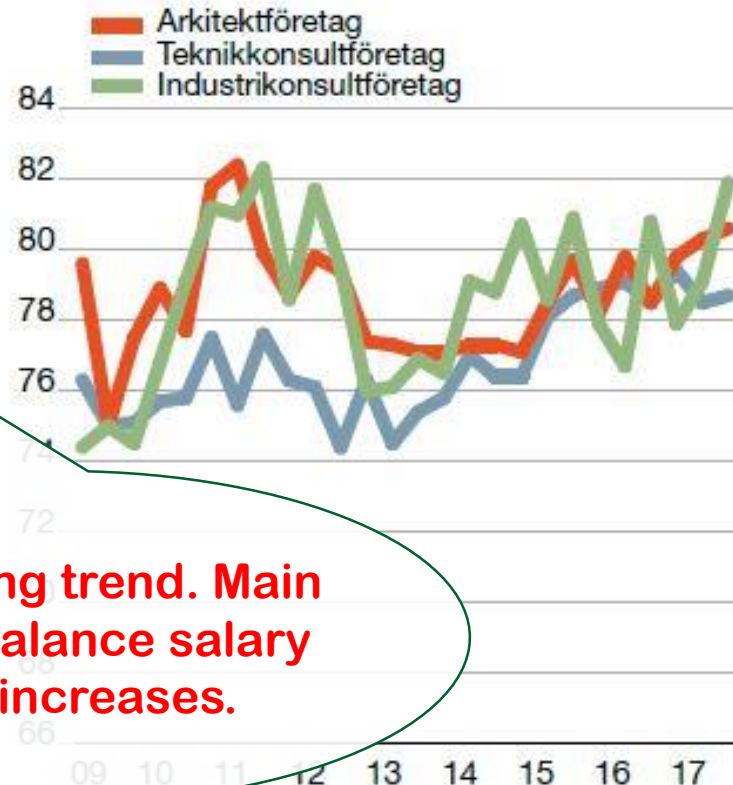
BILLING RATIOS

Genomsnittlig debiteringsgrad
börsnoterade företag



De börsnoterade företagens debiteringsgrader är vägda efter företagens respektive storlek.

Genomsnittlig debiteringsgrad per delsektor

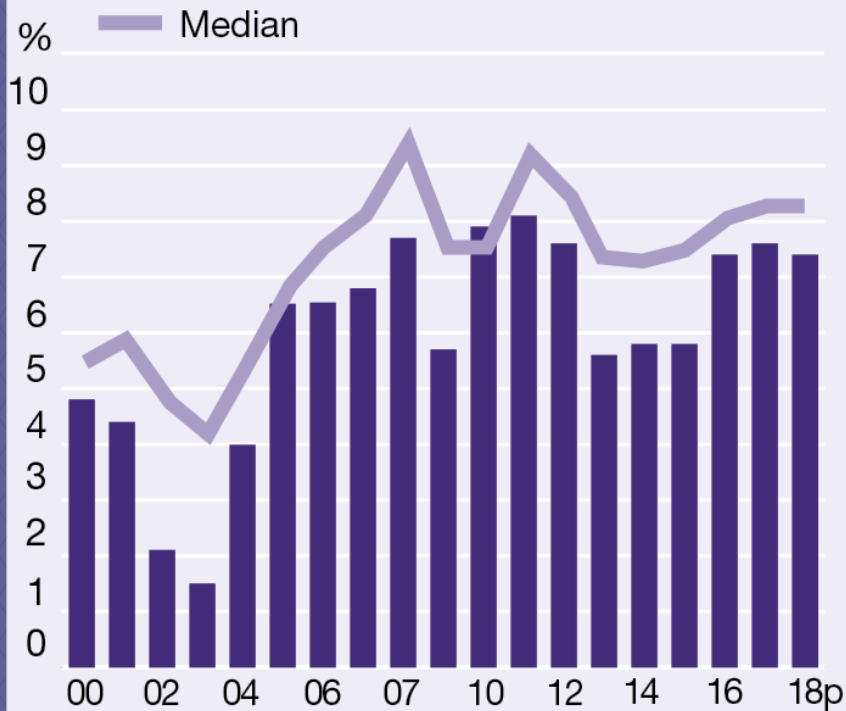


Increasing trend. Main tool to balance salary cost increases.

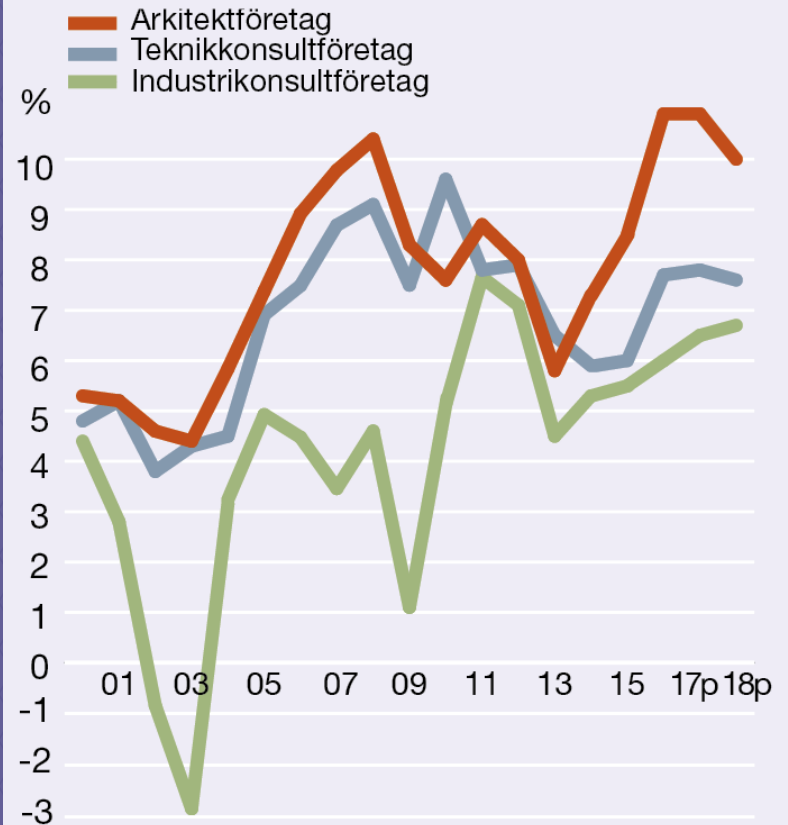
Från medlemsundersökningar till Investeringssignalen, vägt på företagens respektive storlek.

PROFIT MARGINS (EBT)

Vinstmarginaler i de 300 största konsultföretagen

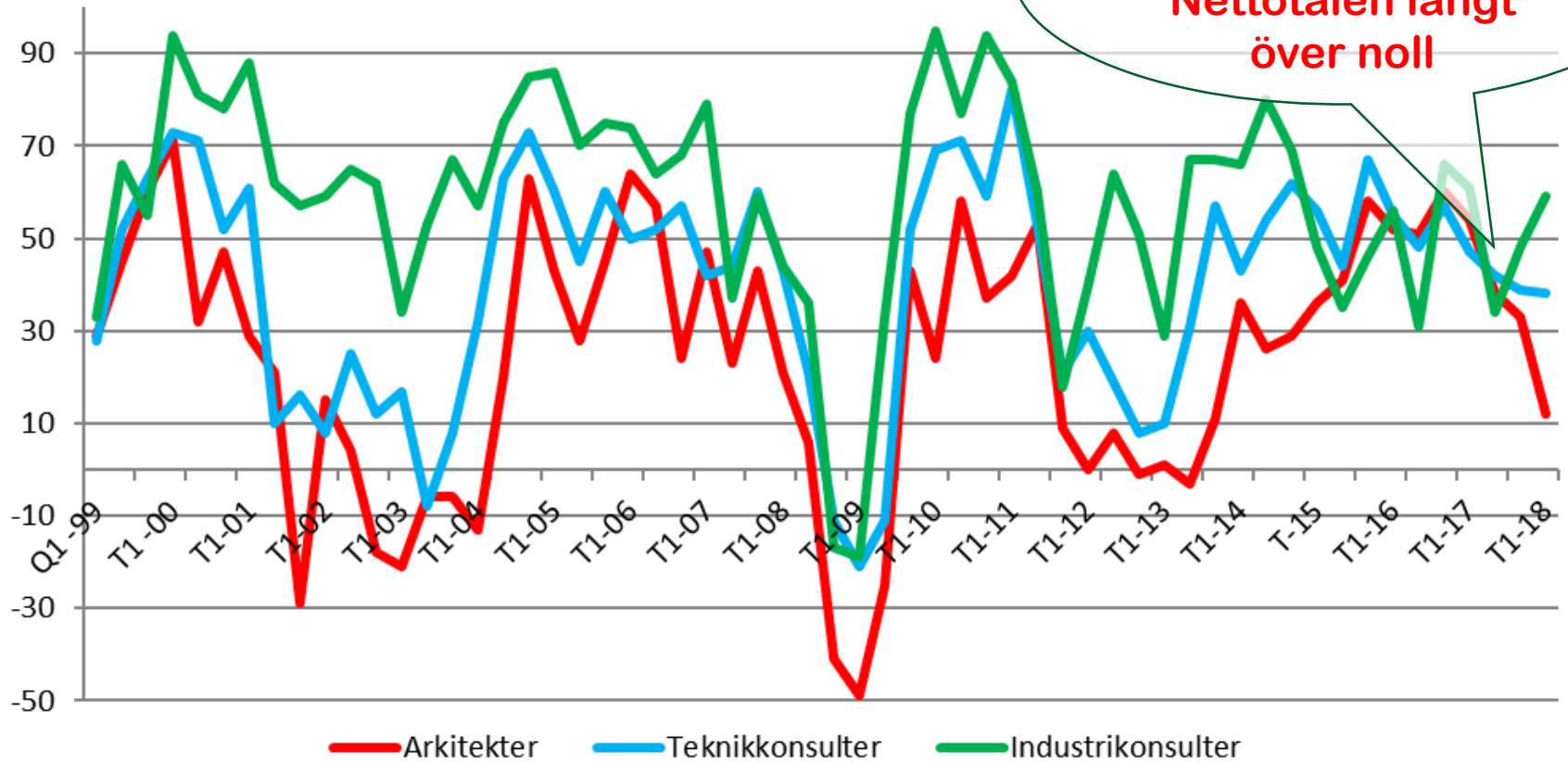


Vinstmarginal



EXPECTATIONS (ORDERS)

Konfidensserie - orderläget om 6 månader



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



New
industry
?

**SVENSKA
TEKNIK&DESIGNFÖRETAGEN**

**– INNOVATIV
DESIGN FÖR
SMARTA**



SAMHÄLLEN

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

FÖRENINGEN

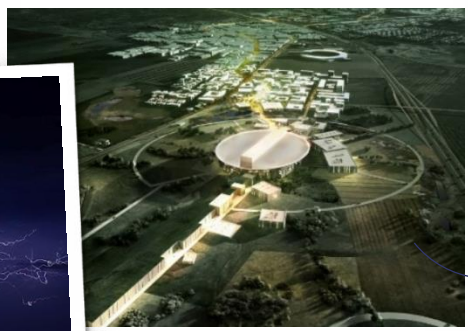
CONTRACTS - ABK

- 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

- Process 2018 to be direct members of Svenskt Näringsliv, Swedish Association of Enterprises. Effective Jan 1, 2019.
- Will remain within Almega, but will be more active in work on wages, salaries etc with our unions
- Hopefully: a new name this fall

Pålitlig reservkraft



Forskningscentrum
med världens mest
kraftfulla neutronkälla



Yteffektiva
ungdomsbostäder

VARA MEDLEMMAR SKAPAR INNOVATIV DESIGN FÖR SMARTA SAMHÄLLEN

Förpackningskapacitet



Sveriges största
järnvägsprojekt



Ny tunnelbana

