

SWEDEN: MARKET AND TRENDS

INNOVATIONSFÖRETAGEN



Magnus Höij 10 nov 2020

SITUATION IN SWEDEN

A tough spring and summer in Sweden

Second wave: increase in many parts of Sweden

More restrictions than in the spring

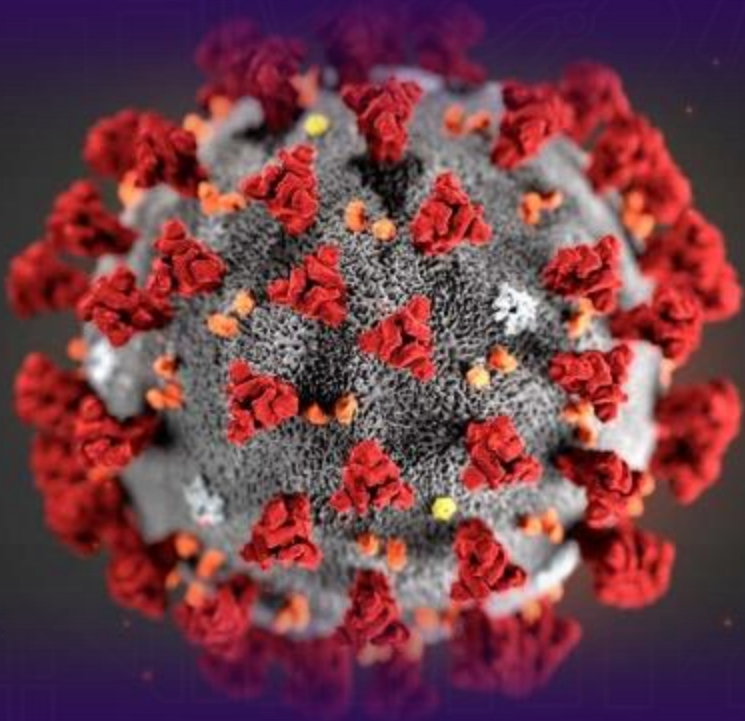
Schools still open, but universities mainly online

Encouraged to work from home

Construction sites open, and so far with very small problems

In general: the use "lockdown" is not used, but with huge impact on the society

Strong economy in Sweden

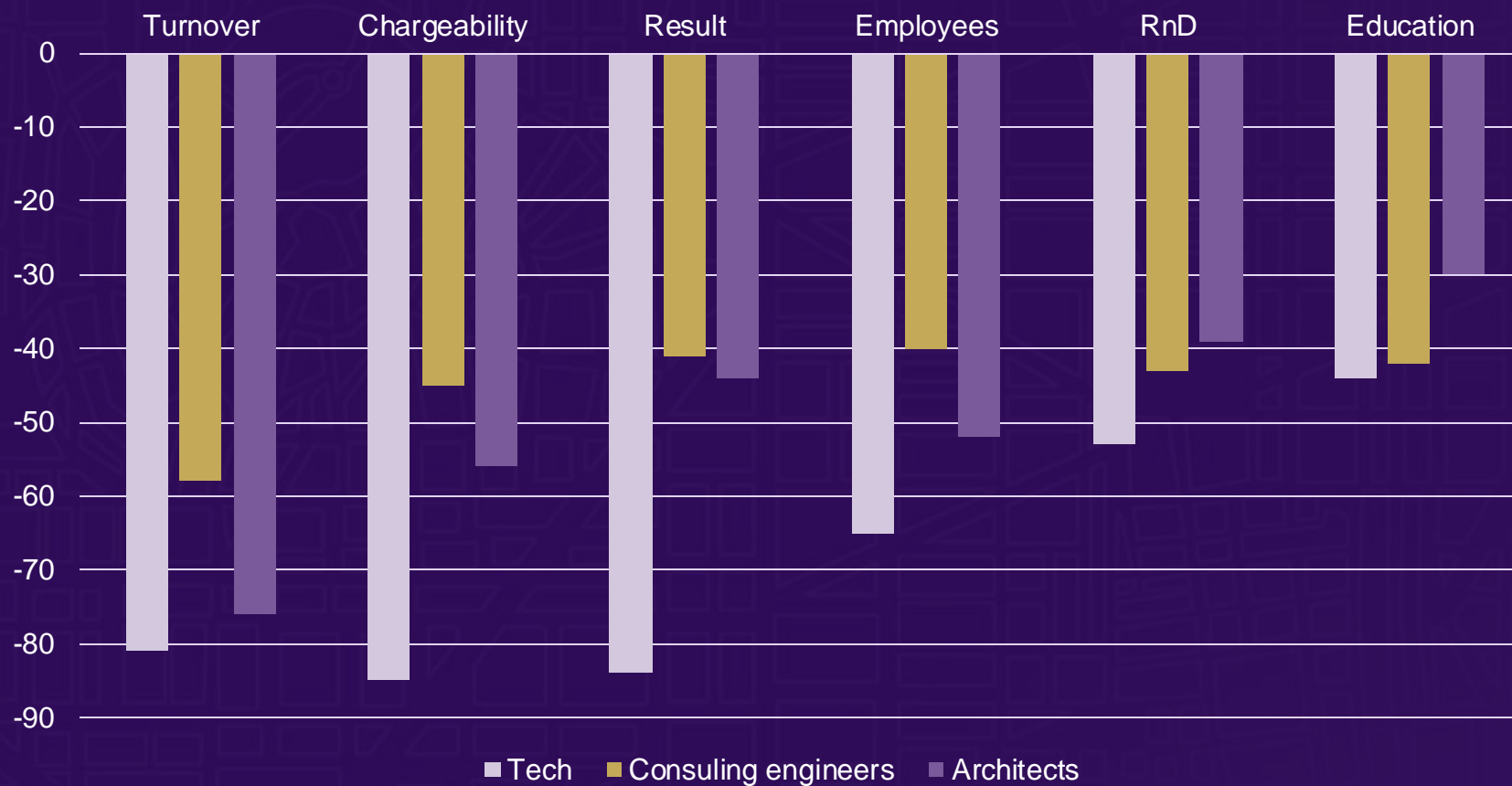


PROBLEMS FOR THE INDUSTRY – BUT WITH MANY EXCEPTIONS

- Many companies have been affected severely – others not at all
- Between 60-80 procent reports reduced turnover due to Corona
- Brighter future > more than 50 percent believes that the spring will be better

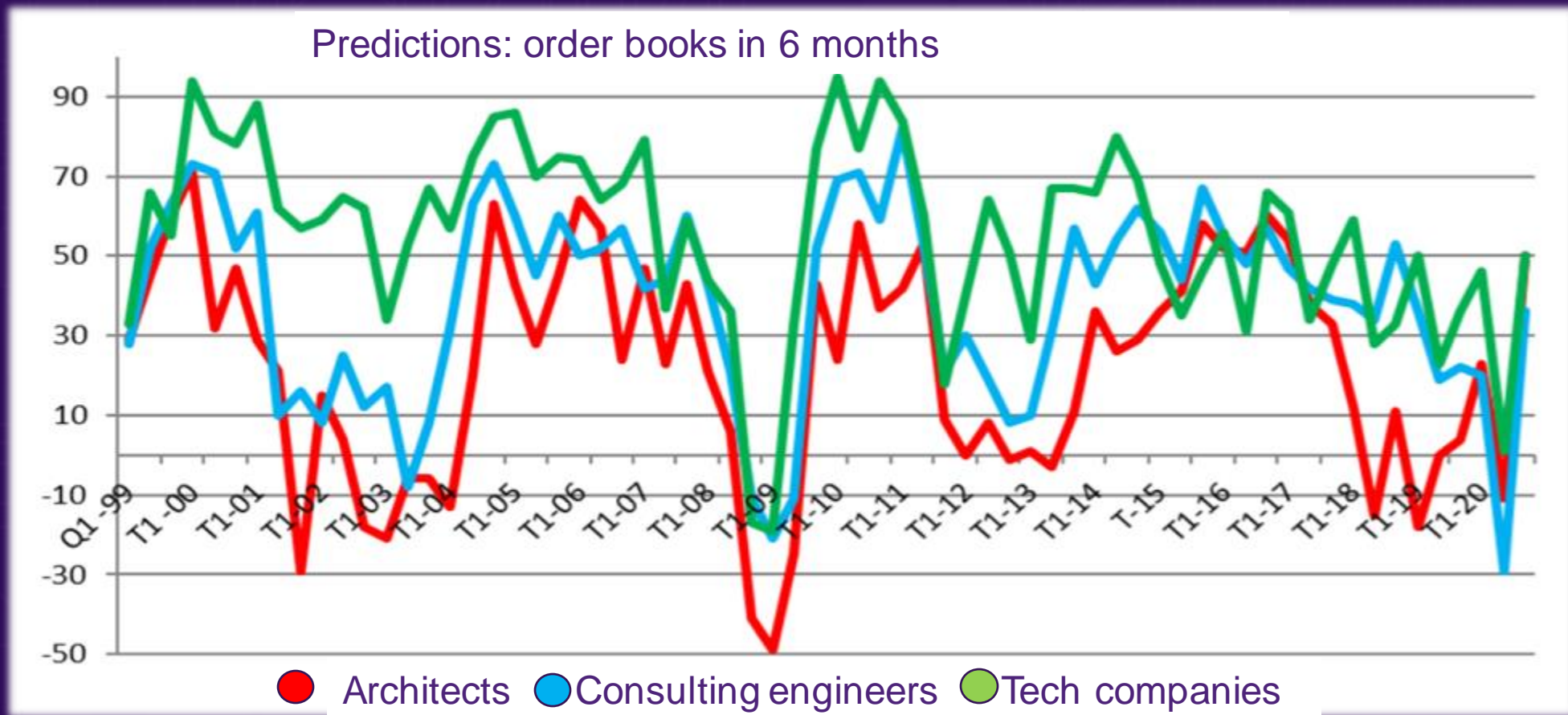
Källa: Investeringssignalen, Innovationsföretagens medlemsundersökning där 100 företag som tillsammans sysselsätter knappt 23 500 medarbetare i Sverige deltagit. Undersökningen genomfördes under september och oktober.

2020 – A TOUGH YEAR



Trend for companies within the association: number of positive responses minus the negative responses.

POSITIVE OUTLOOK



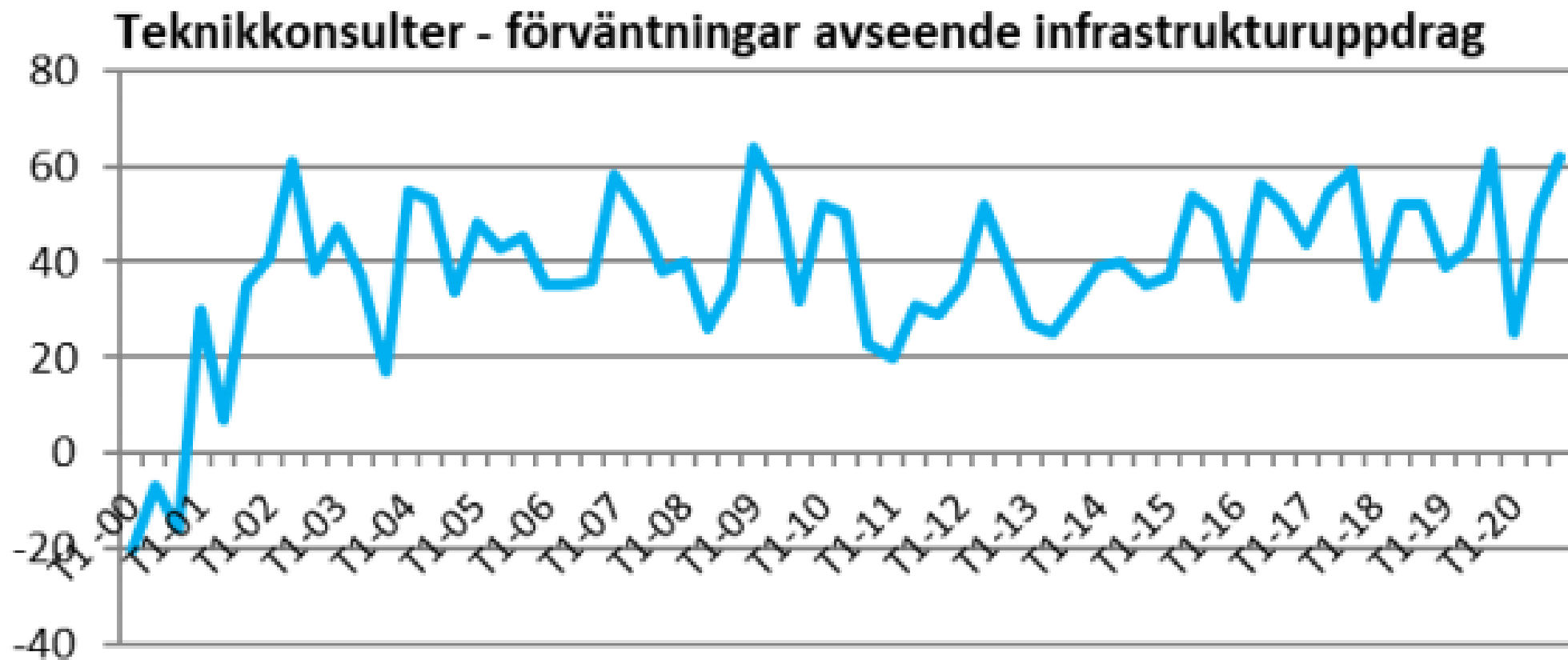
Konfidensindikatorn för arkitekter, teknikkonsulter och industrikonsulter. Visar förväntningar på orderläget om sex månader

EXPECTATIONS FOR INDUSTRY SEGMENTS

Teknikkonsulter				September 2020	
Delsektorer	Förväntningar (%)			Andel volym (%)	
	Ökar	Oförändr.	Minskar	2019	2018
Bostäder	22	51	27	12	12
Övriga hus	36	46	18	21	23
Industribyggnader	20	63	17	7	7
Infrastruktur	62	38	0	33	30
Övriga anläggningar	19	62	19	8	9
Miljö/utredningar	43	46	11	13	12
Stadsplanering	16	79	5	6	7
Totalt vägt	40 (30)	48 (49)	12 (21)	100	100

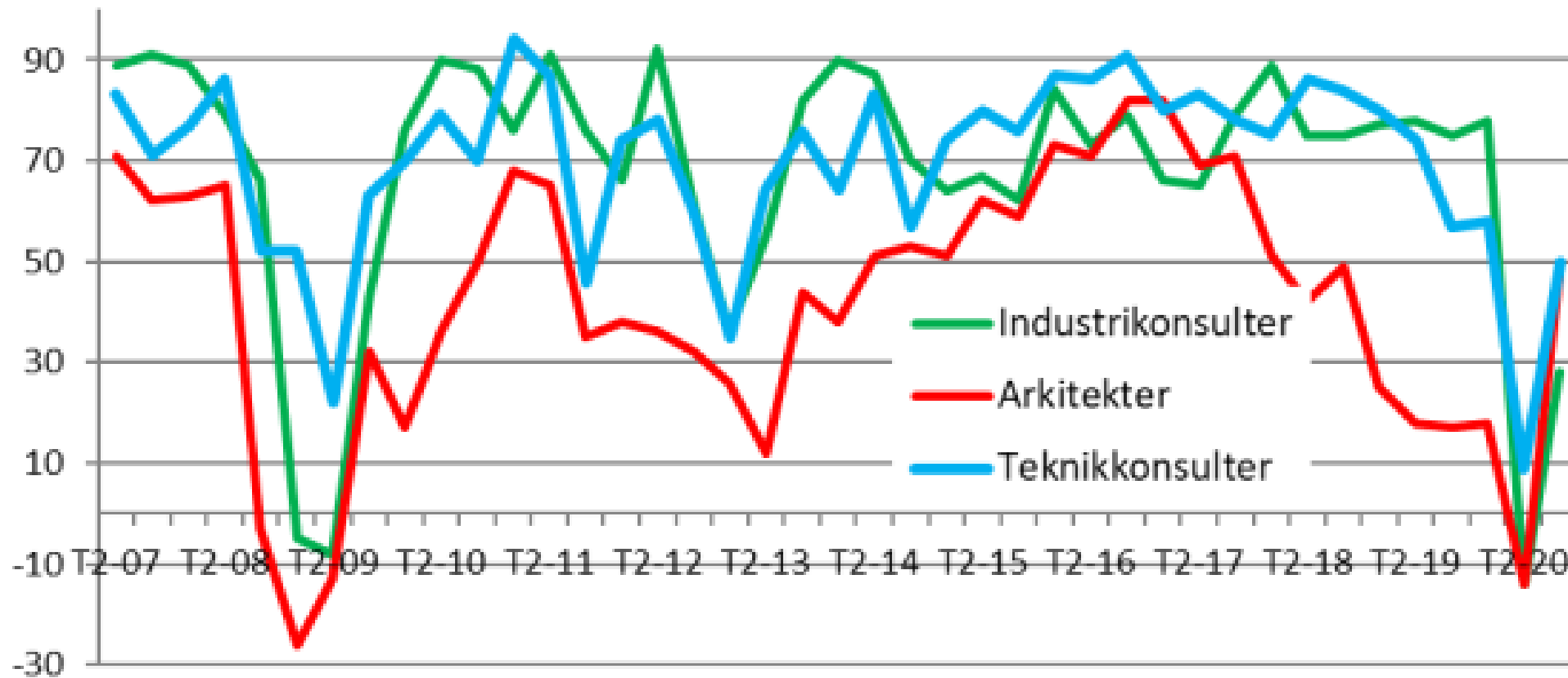
Tabell 4: Teknikkonsulternas förväntningar på orderstockens utveckling om sex månader, fördelat på delsektorer.

GOOD MARKET FOR INFRASTRUCTURE



CHANGES IN STAFF DEVELOPMENT

Förväntningar på personalstyrkans utveckling om 6 månader - netttotal



PRICE DROP

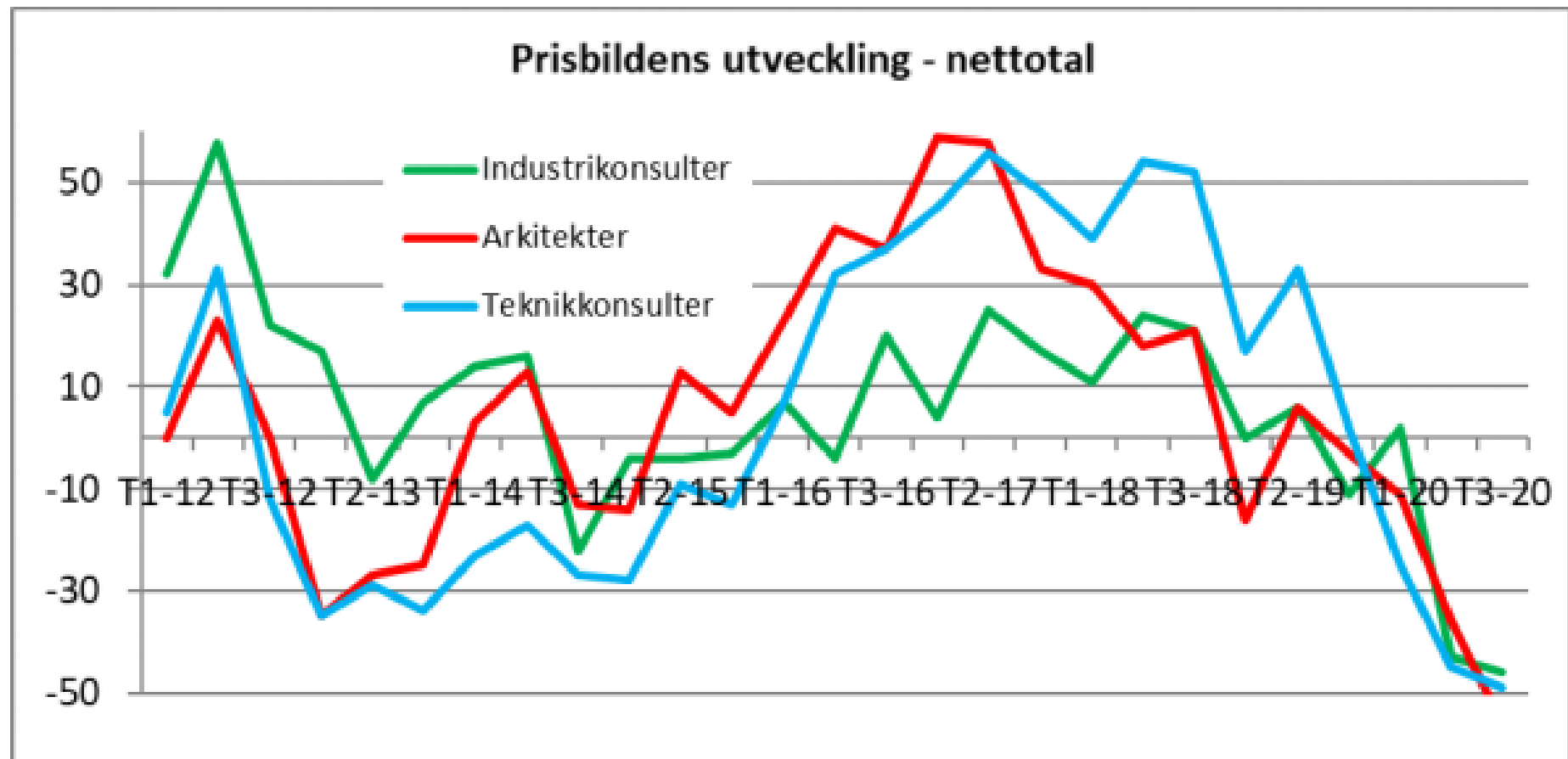


Diagram 6: Prisbildens utveckling sedan senaste mätningen. Anger netttotal. Teknikkonsulter, arkitekter och industrikonsulter var för sig.

THE INDUSTRY IN SWEDEN

A digital revolution – overall positive experiences

Good results from many members – with many exceptions

Trafikverket (Swedish Transportation Administration) – close cooperation, many efforts to work with the industry and maintain projects + high speed railway project

Very uncertain future for commercial buildings, offices etc

Long term issues: how will this change the way we work, live, shop, travel?

Fees pushed down – from a far too low level

ASSOCIATION ISSUES

A stronger association – the need for cooperation and sharing of perspectives

Increased frequency and more participants in our committees

On top of that:

Revisions of our mutual contracts (AB/ABT)

Revisions of our collective agreements between employers and employee associations