

Spir Group ASA – Q4 & FY 2024

CEO Per Haakon Lomsdalen & CFO Cecilie Brænd Hekneby

13 February 2024

Double digit growth and improving margins

SOLID ARR GROWTH

443

MNOK ARR
(up 11% from December 2023)



ACCELERATED REVENUE GROWTH

274

MNOK REVENUE IN Q4 2024
(up 13% from Q4 2023)



INCREASED GROSS PROFIT

187

MNOK GROSS PROFIT IN Q4 2024
(up 16% from Q4 2023)



INCREASED ADJUSTED EBITDA¹

51

MNOK ADJ EBITDA IN Q4 2024
(up 29% from Q4 2023)



¹Adjusted for non-recurring items - MNOK 0.4 in Q4 24 (MNOK 5.2 in Q4 23) and MNOK 8.0 FY 24 (MNOK 19.7 FY 23)



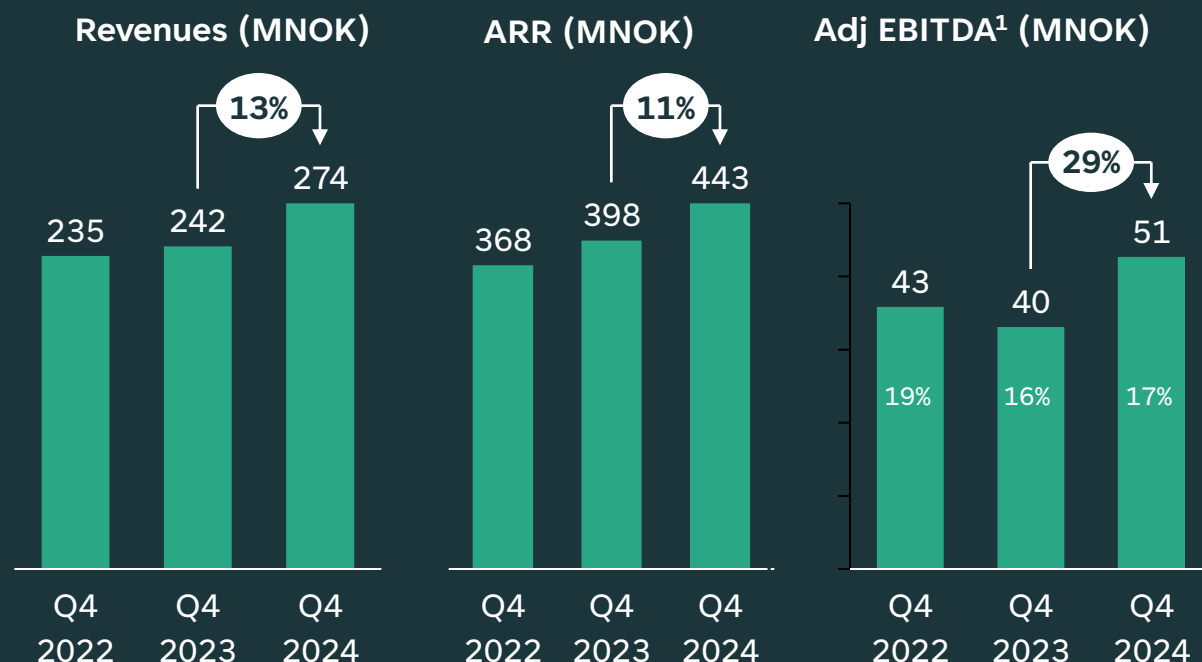
Financial Review

Q4 & FY 2024

Highlights Q4 2024

Strong quarter with double digit growth and increasing margins

- Strong quarter with overall revenue growth of 13% to MNOK 274 compared with Q4 2023 including MNOK 10 in new revenue
- Annual recurring revenue (ARR) within the Group of MNOK 443 at the end of Q4 2024, up 11 percent from Q4 2023 including MNOK 15 in new ARR from Iverdi
- Increasing margins and gross profit of MNOK 187, up 16% from Q4 2023
- Adj EBITDA of MNOK 51 up 29 percent from MNOK 39 in Q4 2023 with 17% EBITDA-margin.
- Cash EBITDA of MNOK 20 up MNOK 11 from Q4 2023.
- Net finance of MNOK -9, compared to MNOK -19 in Q4 2023, positively impacted by gain on interest rate swaps
- Net income of MNOK 7 up from MNOK -17 in Q4 2023

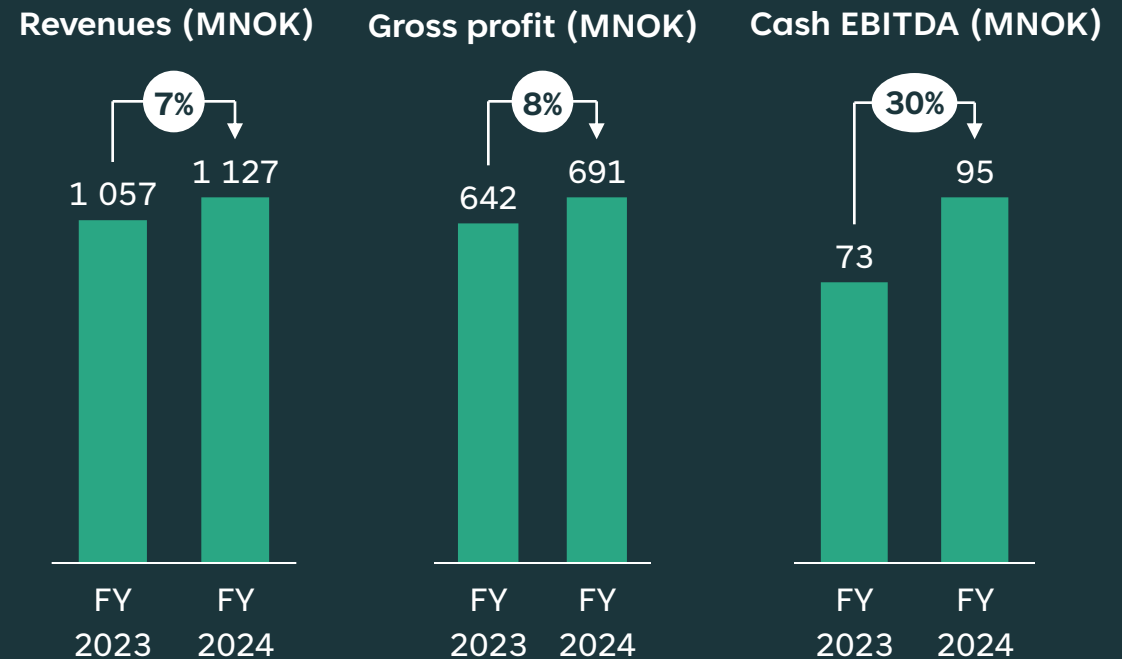


¹Adjusted for non-recurring items - MNOK 0.4 in Q4 24 (MNOK 5.2 in Q4 23) and MNOK 8.0 FY 24 (MNOK 19.7 FY 23)

Highlights FY 2024

Improved results during the second half 2024

- Revenue of MNOK 1 127 up 7% percent from FY 2023 and gross profit up 8% to MNOK 695
- Unbolt and its main subsidiaries (incl Iverdi) are consolidated from 26 August 2024 and impacts full year revenue with MNOK 14
- Adj EBITDA¹ of MNOK 201 up 6% from FY 2023
- Cash EBITDA up 30% to MNOK 95
- Net finance of MNOK -6 up MNOK 49 from FY 2023, impacted by a one-off financial gain following the consolidation of Unbolt AS in Q3 2024, gain in fair value interest rate swaps and interest on bank deposits
- Net income in FY 2024 of MNOK 51 is up from MNOK -9 in FY 2023

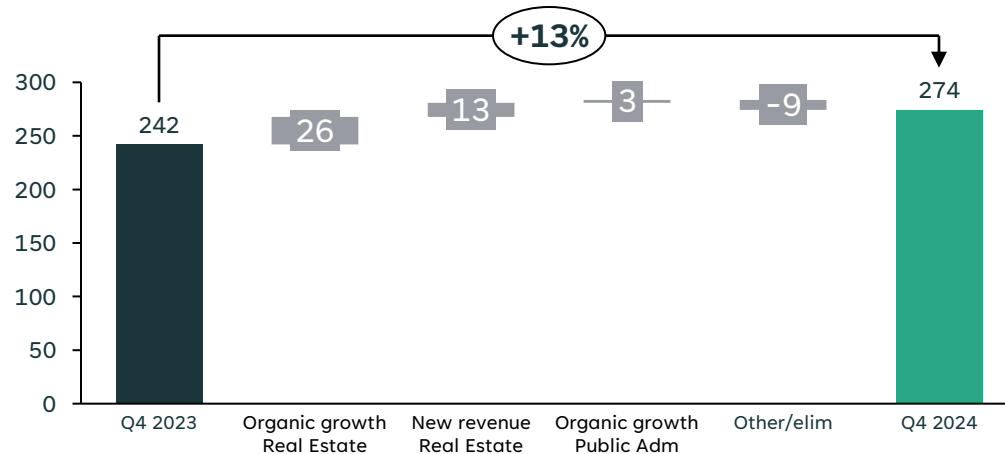


¹Adjusted for non-recurring items - MNOK 0.4 in Q4 24 (MNOK 5.2 in Q4 23) and MNOK 8.0 FY 24 (MNOK 19.7 FY 23)

Q4 & FY 2024 - FINANCIAL REVIEW

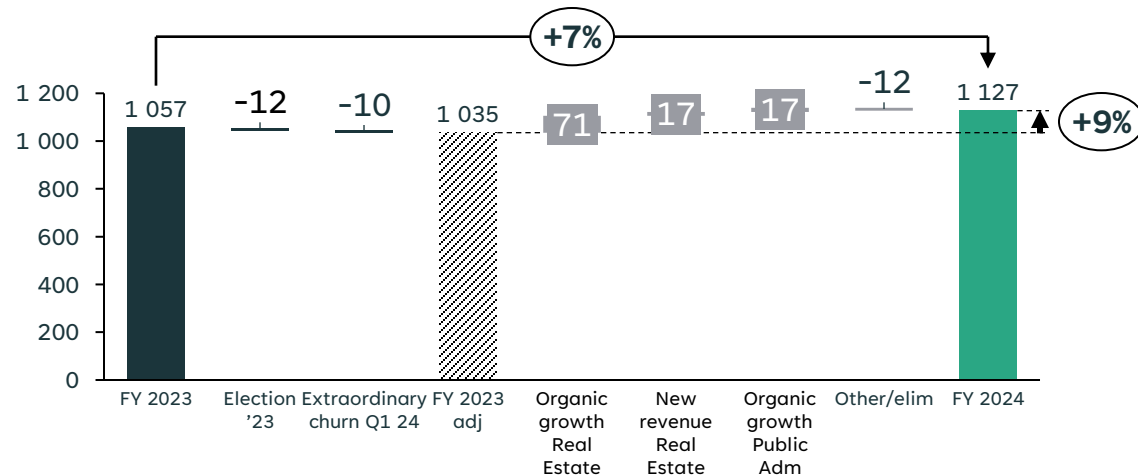
Strong development in real-estate continues to drive revenue-growth in the fourth quarter

Development Q/Q



- 13% revenue growth in the quarter driven by 23% in the real estate business area including 9 MNOK in new revenue from iVerdi and MNOK 4 from 4CastMedia (merged with Boligmappa in December*)
- Double-digit revenue growth in Ambita, Boligmappa and Metria following high activity in the real estate market
- Within Public Administration Sikri has steady revenue growth of 4%. 80% win-rate in the quarter and 12% underlying growth in ARR YoY
- Gross-margin up 2 pts

Development Y/Y

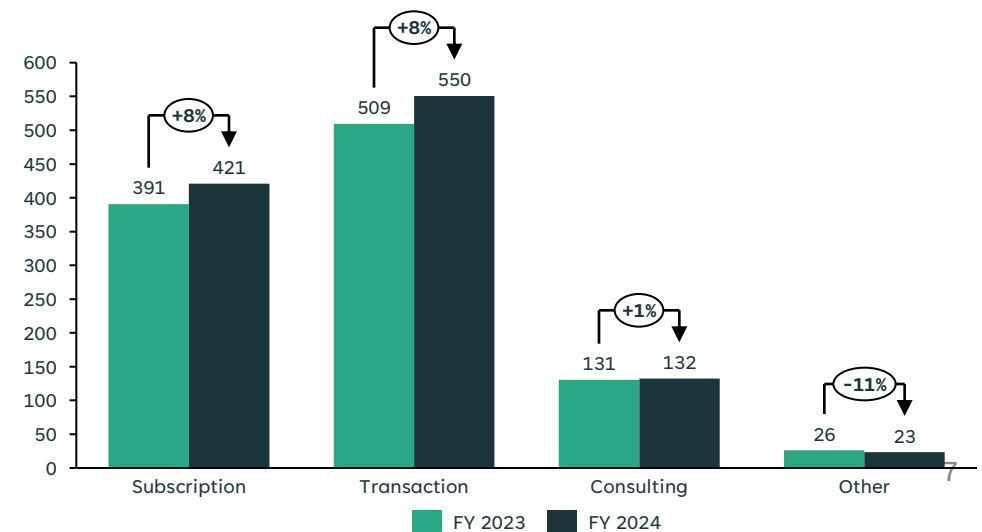
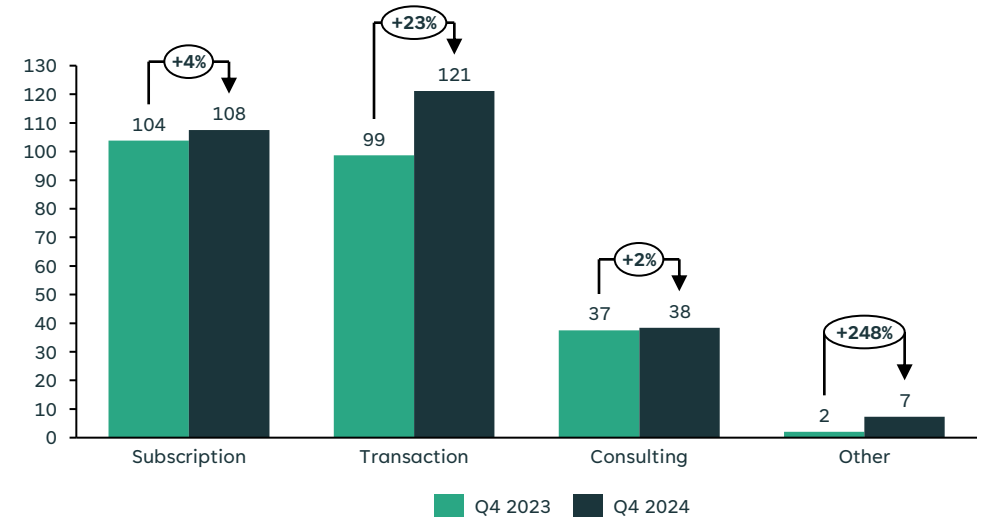


- Full year revenue growth of 7% are impacted by a slow start in the real estate business area
- 9% growth when adjusting for bi-annual election in Public administration in 2023 and an extraordinary churn in Q1 2024.

*4Cast Media was merged with Boligmappa in December 2024 with effect from 1.1.2024. The comparable 2023-figures are reported under Other/elim

Scalable revenue growth

- Total revenue up 13% to NOK 274 million in the quarter and up 7% to MNOK 1 127 YTD
- Subscription +4% in the quarter and +8% for FY 2024 following steady ARR-development across the companies
- Transaction-based revenue up 23% in the quarter impacted by strong development in the real estate market in Norway and market recovery in Sweden. Revenue FY 2024 up 8% although hampered by a weak first quarter
- Steady level of consulting revenues. Fewer upgrade projects in Sikri since the majority of customers have migrated to cloud are offset by increased demand for Metria’s consultant services within climate and sustainability

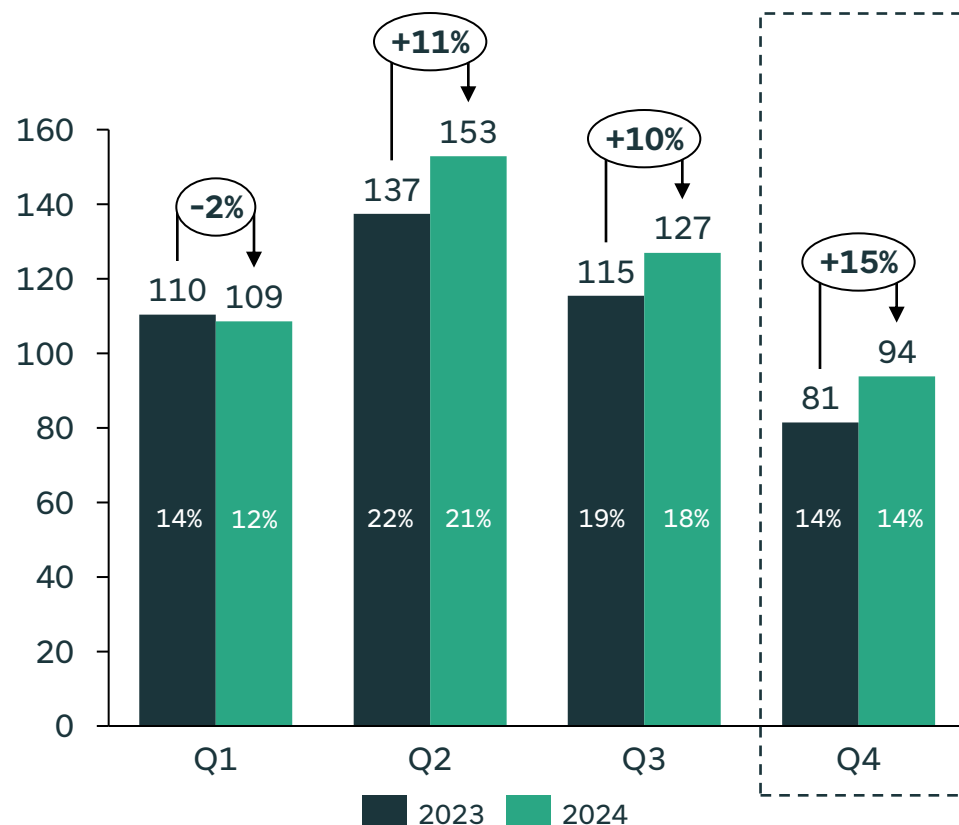


15% revenue growth in a strong real estate market

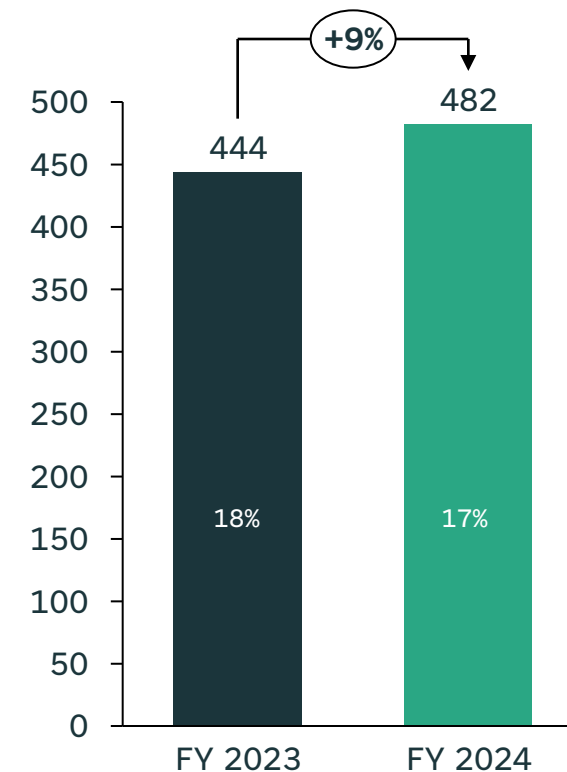
Main developments

- Revenue up 15% to MNOK 94 in Q4 2024
- Transaction-based revenue up 16% to MNOK 81 in the quarter following strong development in the Norwegian real estate market. Properties put out for sale up by 5% in Q4 2024
- Annual recurring revenue (ARR) at the end of December was steady at MNOK 41.
- The commencement of new homes in Q4 2024 was down 3 percent. When conditions for real estate development improve, it is expected that this will positively impact Ambita’s sale of digital maps and electronic applications
- Gross profit in Q4 2024 is positively affected by reversal of provisions for claims that are obsolete defined as OIE
- Adj EBITDA¹ of MNOK 14 in Q4 2024 with 14% EBITDA-margin
- Revenue up 9% for FY 2024 to MNOK 482 with adj EBITDA of MNOK 82

Q4 Revenue (MNOK) and adj EBITDA margin¹



YTD Revenue (MNOK) and adj EBITDA margin¹



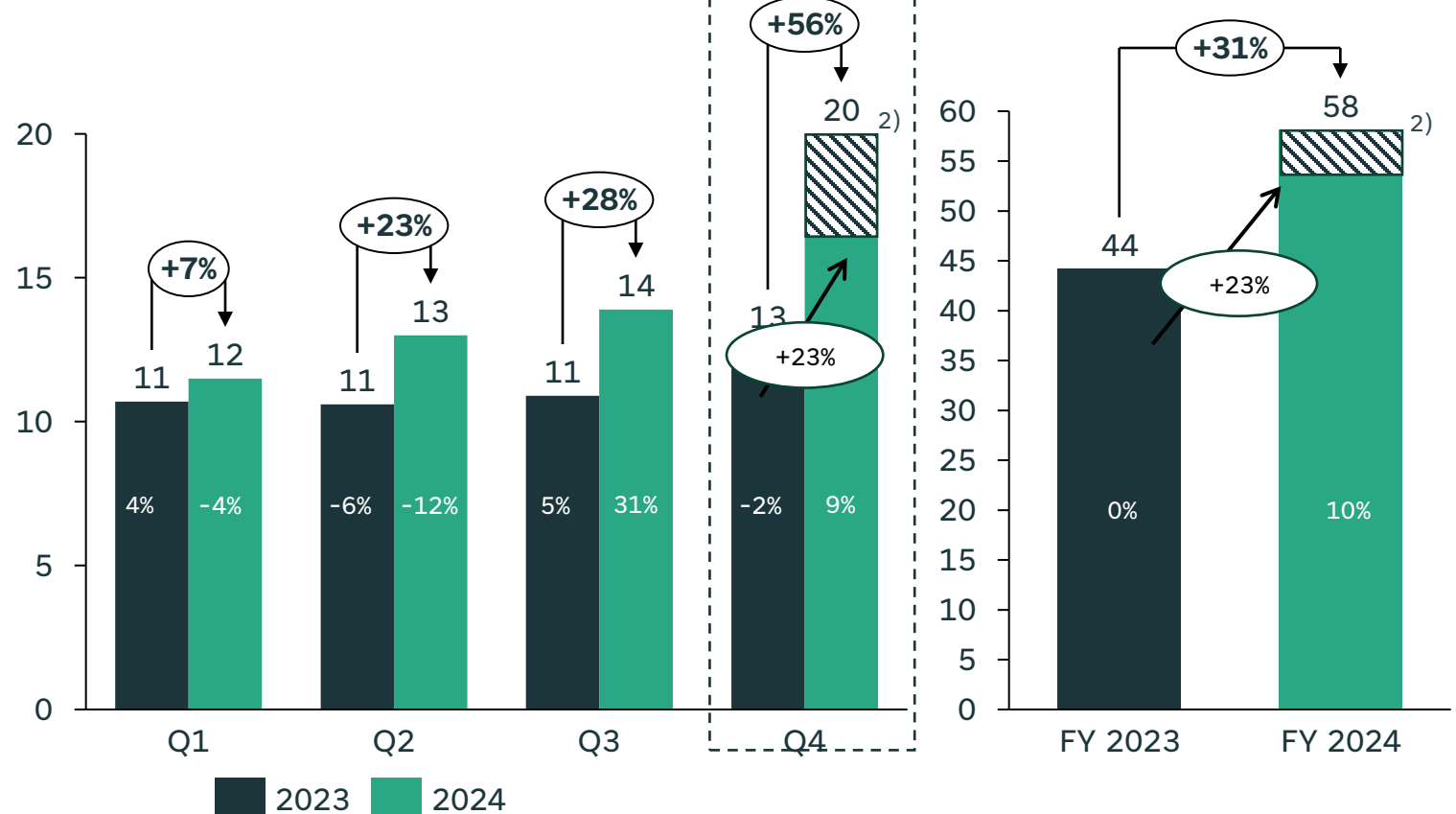
1) Adjusted for restructuring costs – MNOK -2.5 in Q4 2024 and MNOK 1.3 in FY 2024 (no adjustments FY 2023)

Rapid revenue growth and increasing profitability

Main developments

- Revenue up 56% to MNOK 20 in Q4 2024
- 4CastMedia merged with Boligmappa in December 2024 impacting revenue in Q4 2023 with MNOK 4 and adj EBITDA with MNOK -2.
- Run rate ARR of B2B-revenue MNOK 53 up 30% from Q4 2023
- Transaction based revenues from B2C-products introduced late 2023 of MNOK 4.4
- Adj EBITDA¹ of MNOK 2 up from MNOK 0 one year earlier
- Revenue up 31% for FY 2024 to MNOK 58 with adj EBITDA of MNOK 6 and 10% adj EBITDA-margin

Q4 Revenue (MNOK) and adj EBITDA margin¹ YTD Revenue (MNOK) and adj EBITDA margin¹



1) Adjusted for restructuring costs – MNOK 0.0 in Q4 2024 and MNOK 1.6 in FY 2024 (no adjustments in FY 2023)

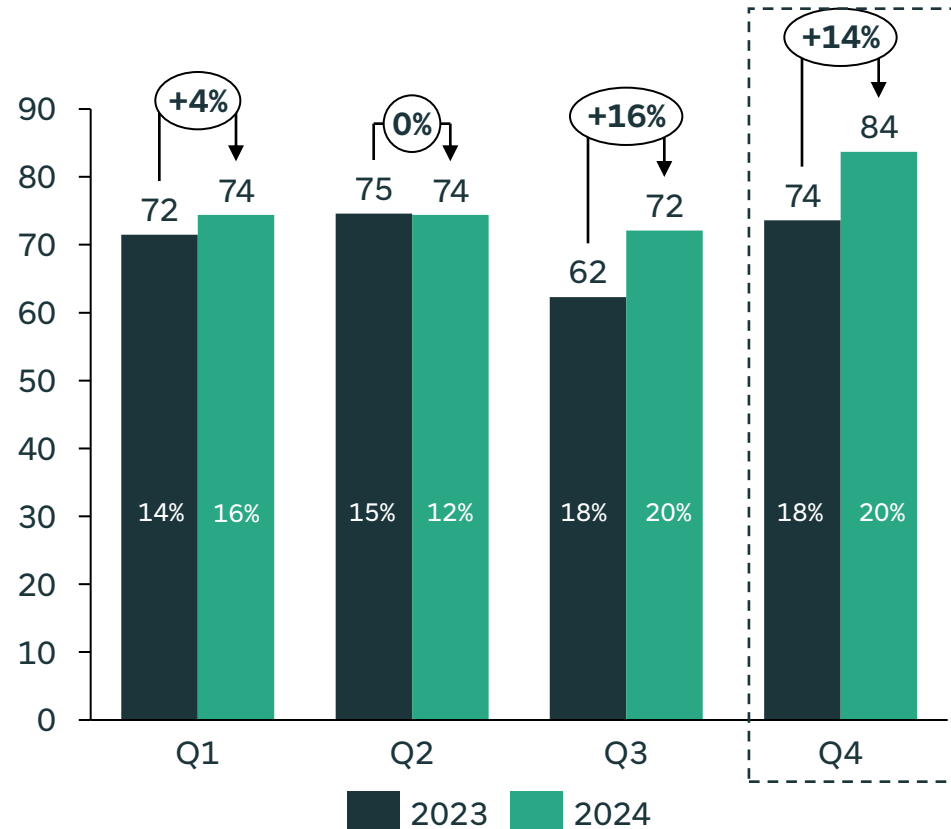
2) 2024 figures include 4CM reported as Other/elim in FY2023

14% revenue growth and increased profitability

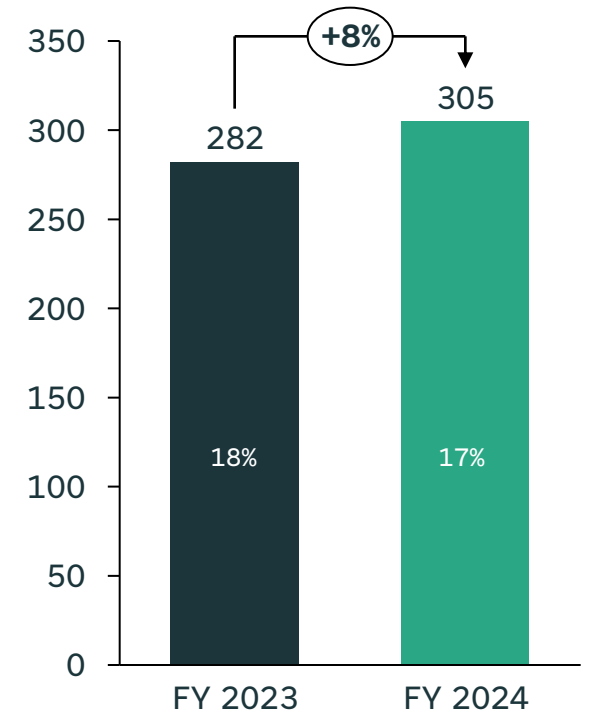
Main developments

- Strong development and market recovery in Swedish real estate market and 34% growth in transaction-based revenues to MNOK 32
- Stable development in subscription revenue in LC and ARR of MSEK 116
- Solid demand for consulting services with revenue up MNOK 2 to MNOK 22
- Gross profit up 11% to MNOK 52 with gross margin of 62%
- Increased profitability with adj EBITDA¹ of MNOK 17 and adj EBITDA-margin up from 18% in Q4 2023 to 20% in Q4 2024 following increased gross profit and cost initiatives showing results
- Revenue up 8% YTD to MNOK 305 with adjusted EBITDA of MNOK 52

Q4 Revenue (MNOK) and adj. EBITDA margin¹



YTD Revenue (MNOK) and adj. EBITDA margin¹



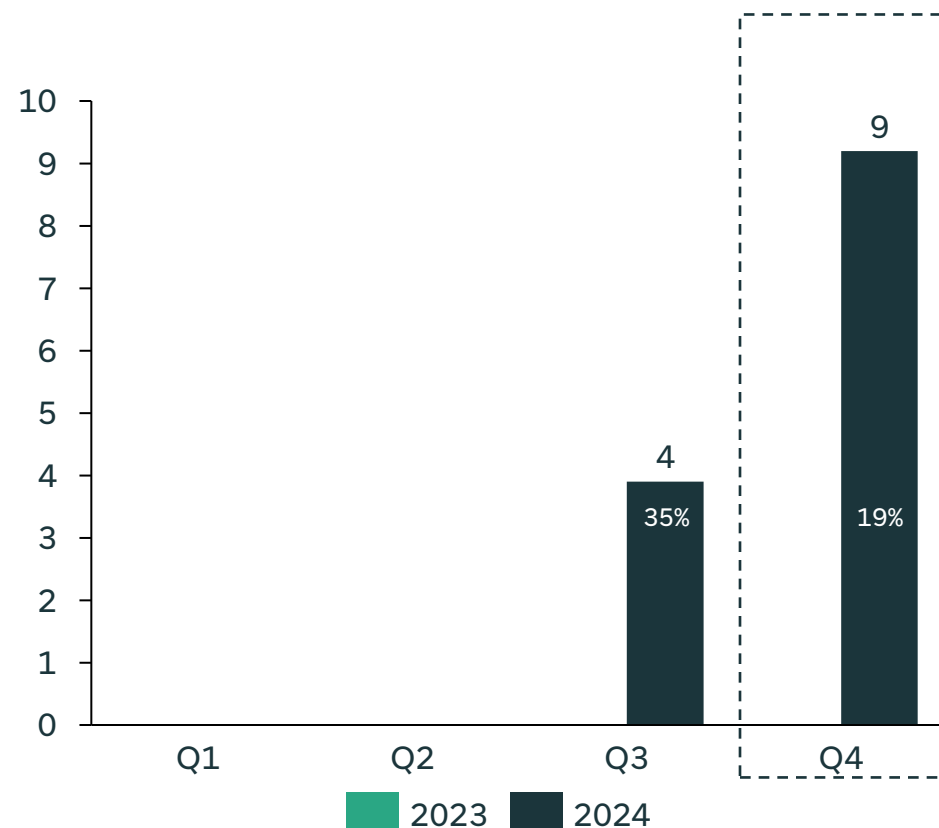
¹) Adjusted for restructuring- and integration costs - MNOK -0.8 in Q3 24 (MNOK 1.8 in Q3 23) and MNOK 2.3 YTD 24 (MNOK 7.7 YTD 23)

New revenue from Iverdi impacts Q4 2024 with MNOK 9 and FY 2024 with MNOK 13

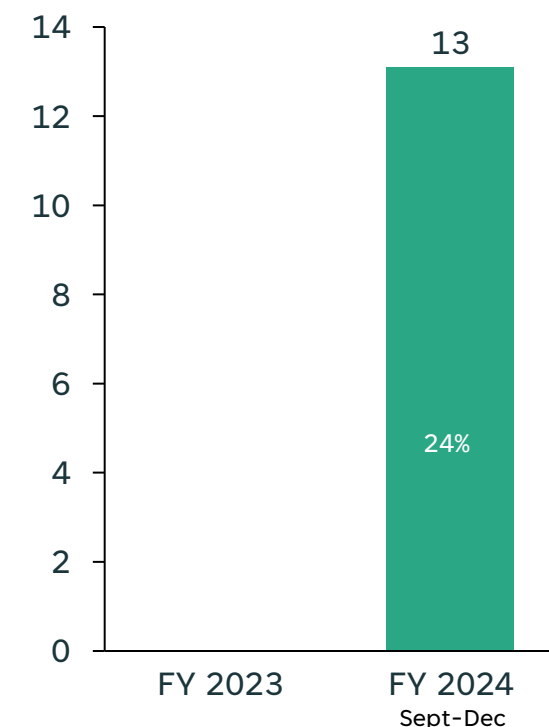
Main developments

- Ivit - Norway's most used professional software for valuation engineers
- Revenue of MNOK 9 in Q4 2024
- Steady ARR of MNOK 15
- 14% increase in reports Q/Q
- Gross profit of MNOK 6 with 65% gross margin
- Adjusted EBITDA¹ of MNOK 2 with 19% adj EBITDA-margin
- Group revenue consolidated with 4 months in FY 2024 of MNOK 13 with 24% adj EBITDA-margin

Q4 Revenue (MNOK) and adj. EBITDA margin¹



YTD Revenue (MNOK) and adj. EBITDA margin¹



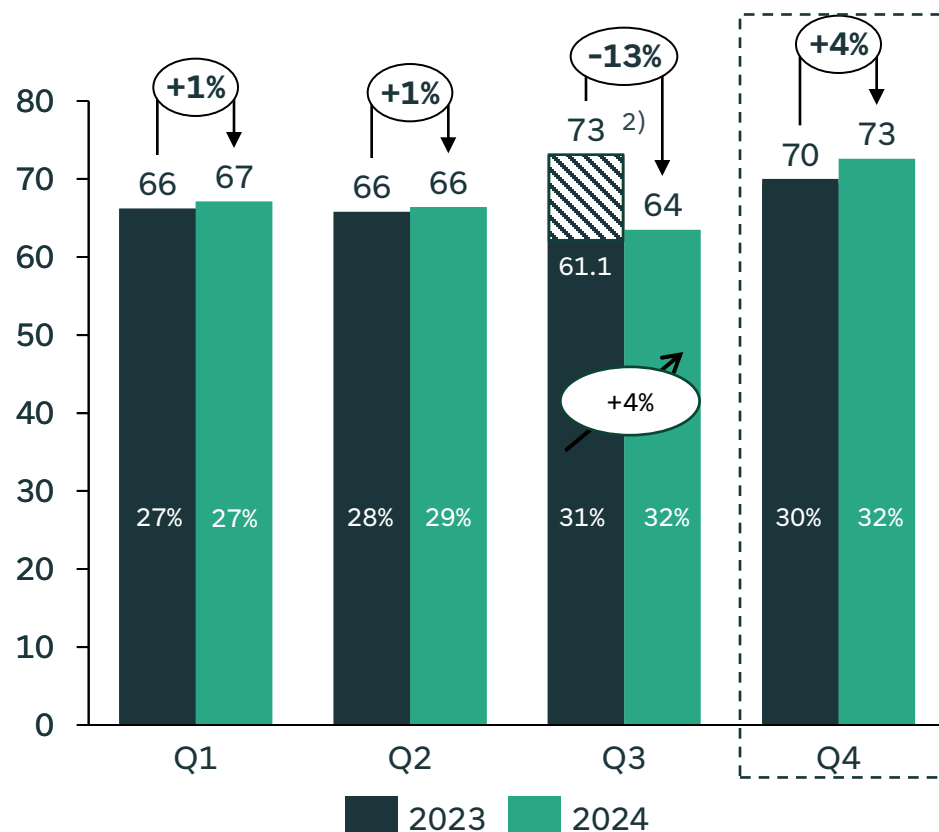
1) No non-recurring adjustments in FY 2024 nor FY 2023

Subscription revenue and ARR up 6% and increased profitability

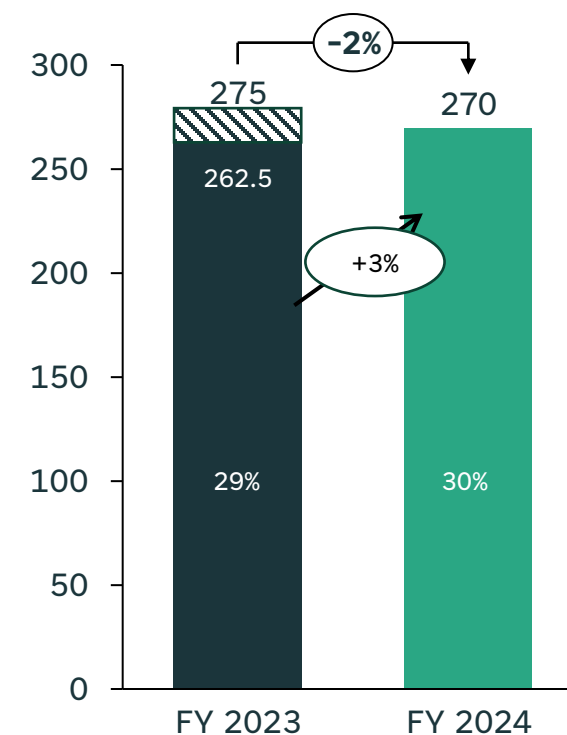
Main developments

- Revenue up 4% to MNOK 73 in Q4 2024
- Subscription revenue up 6% in the quarter to MNOK 53 following steady ARR growth of 6% to MNOK 210 (underlying 12% when adjusting for extraordinary churn of MNOK 10 in Q1 2024)
- Fewer upgrade projects as the majority of customers are migrated to cloud gives lower consulting revenue and lower COGS
- Gross profit up 7% to MNOK 65
- Adjusted EBITDA¹ of MNOK 23 with 32% adj EBITDA-margin
- Revenue up 3% YTD when excluding biannual revenue from election in Q3 2023.
- Adjusted EBITDA of MNOK 81 with 30% adj EBITDA-margin

Q4 Revenue (MNOK) and adj. EBITDA margin¹



YTD Revenue (MNOK) and adj. EBITDA margin¹

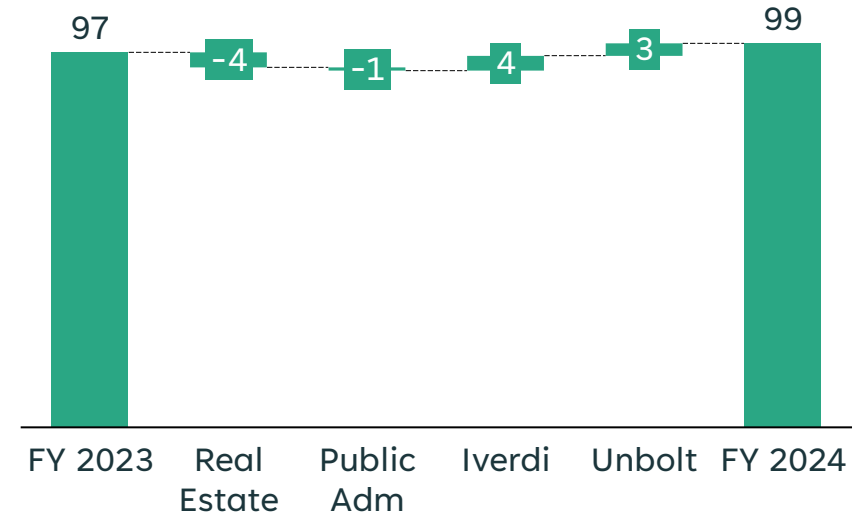


1) Adjusted for restructuring costs – MNOK 0.8 in Q3 24 (MNOK 0.7 in Q3 23) and MNOK 1.0 YTD 24 (MNOK 2.7 in YTD 23)

2) Includes semiannual Election project – MNOK 12

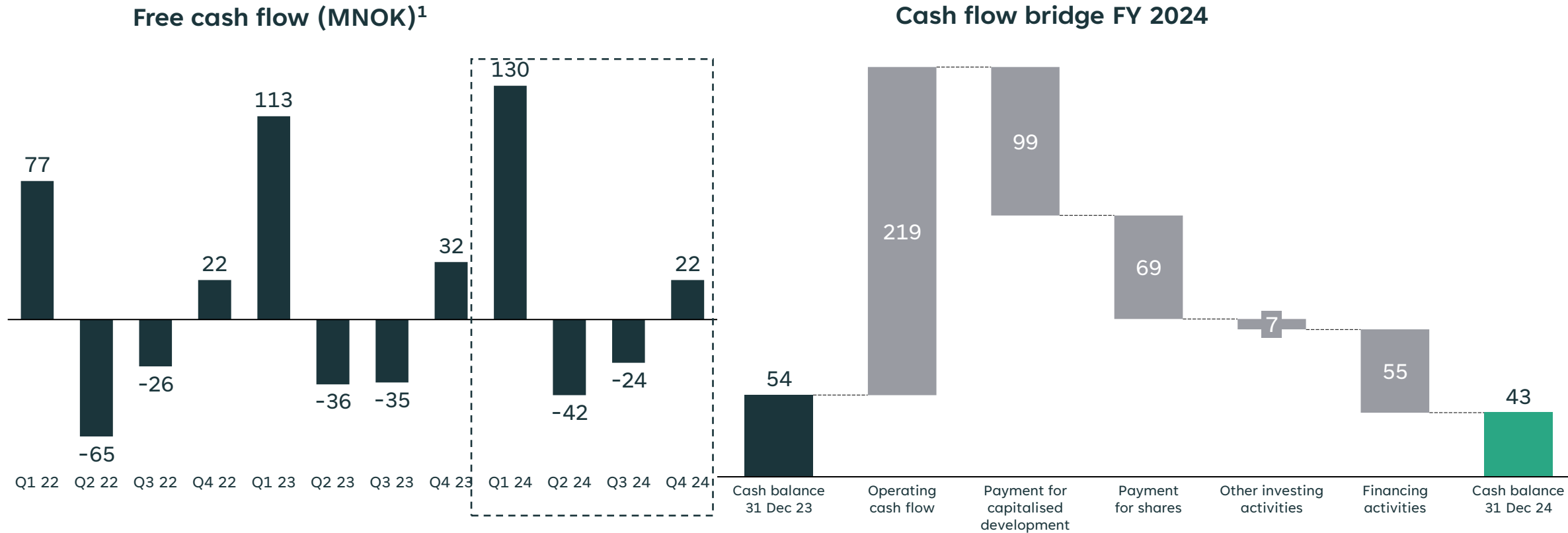
Optimizing investments across the Group to capitalize on growth potential

- Total capex of MNOK 99 in FY 2024, up 2MNOK from FY 2023 incl MNOK 7 from Unbolt and subsidiaries (4 months)
- Total capex in Boligmappa is down by MNOK 10 for FY 2024 compared to FY 2023 following less need for new development
- 9% of revenue in FY 2024 invested to develop new functionality and features to strengthen the market leading positions
- Increased focus on ROI and optimization of spend across the Group
- Planned range of capex for FY 2025 is MNOK 90-95 compared to MNOK 115 in FY 2024 when adjusting for full year effect of Unbolt and subsidiaries



Increased free cash flow in 2024

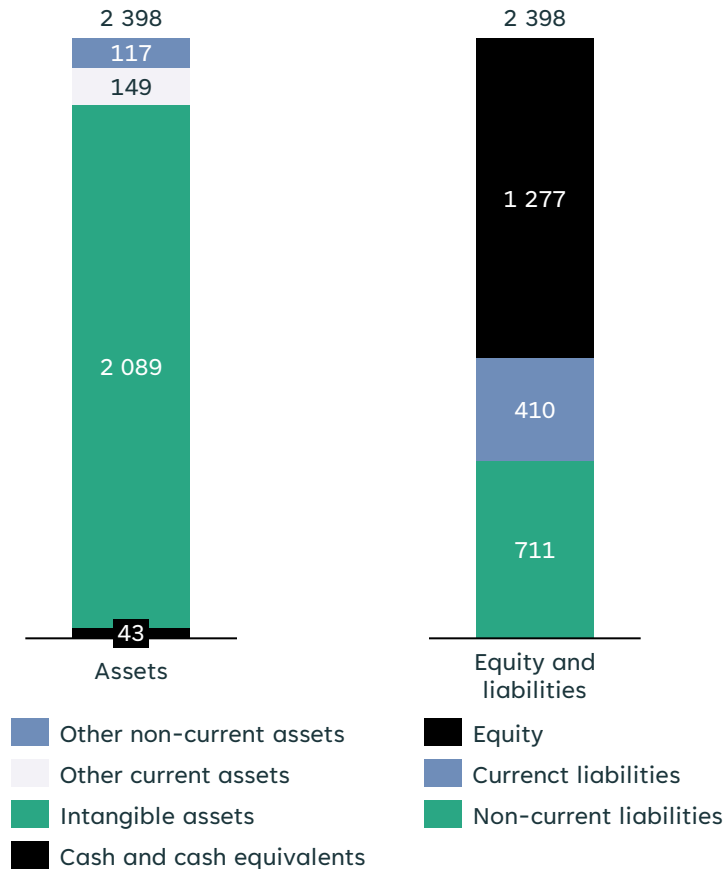
–up from MNOK 74 in FY 2023 to MNOK 86 in FY 2024



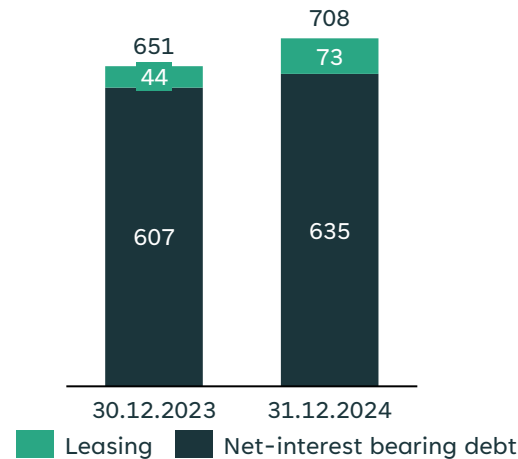
1) Free cash flow includes; operating cash flow, lease repayments and Capex (fixed assets and capitalized development costs)
Excludes acquisition costs.

Strategy of reducing interest bearing debt but acquisition of Unbolt considered significant to strengthen real estate offering

Financial position 31.12.2024 (MNOK)



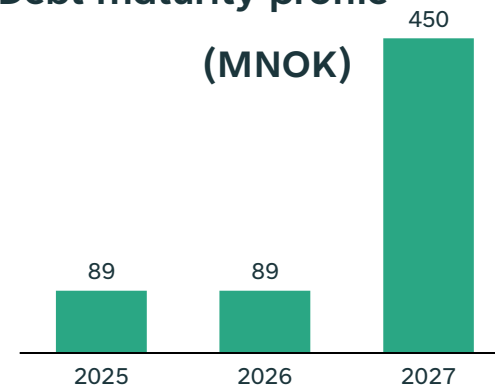
Net interest-bearing debt (MNOK)



Details

- NIBD incl lease liabilities increased from MNOK 651 at year-end 2023 to MNOK 708 in December 2024
 - NIBD ex lease liabilities +MNOK 28
 - Lease liabilities +MNOK 29
- Bullet loan increased with MNOK 80 to MNOK 450 in connection with the acquisition of Unbolt and subsidiaries in August 2024
- 60% of interest-bearing debt as of 31.12.2024 covered by interest rate swaps at favorable terms:
 - MNOK 243 at 3.24% (mature in 2032)
 - MNOK 162 at 3.25% (mature in 2028)
- Equity ratio of 53%
- Cash-balance of MNOK 43
- Liquidity reserve of MNOK 50

Debt maturity profile



Q4 & FY 2024 financial summary

#1

Accelerated total revenue growth driven by the Real Estate business area

#2

Steady growth in Public Administration business area with increasing ARR and high win-rates

#3

Increasing cash EBITDA and continued focus on cost control

#4

Add-on acquisition successfully integrated

Continued improved financial results and positioned for further growth



Q4 Business Update

Per Haakon Lomsdalen

Software house with #1 positions in two business areas

Strong Nordic brands delivering mission-critical software and data



Real Estate

Spir Group is driving the digital transformation of the real estate industry by delivering software and data solutions that enhance transparency, efficiency and sustainability



Real Estate – Higher activity and market recovery

Positive trend continuing into 2025



In Q4 2024 revenue continued with double digit growth, driven by strong development in the transaction-based real estate market in Norway and Sweden



Ambita is maintaining strong market position in a market environment with high competition and rapid technology changes, and achieves strong growth in revenues



Boligmappa continues to explore new revenue streams and partnership to leverage scale. Boligmappa's services are increasingly gaining attention from the media, industry groups and key banking and insurance players



Continued positive development for Metria, revenues up 14%



For iVerdi there was a 14% increase in reports delivered YoY, and approx 90000 condition reports are generated through the iVerdi system every year

Spir Group & Unbolt integration – Unlocking Synergies for Growth

- **Acquisition and Integration**

- Unbolt AS fully acquired in August 2024
- 100-day integration plan completed in December

- **Strategic Reorganization**

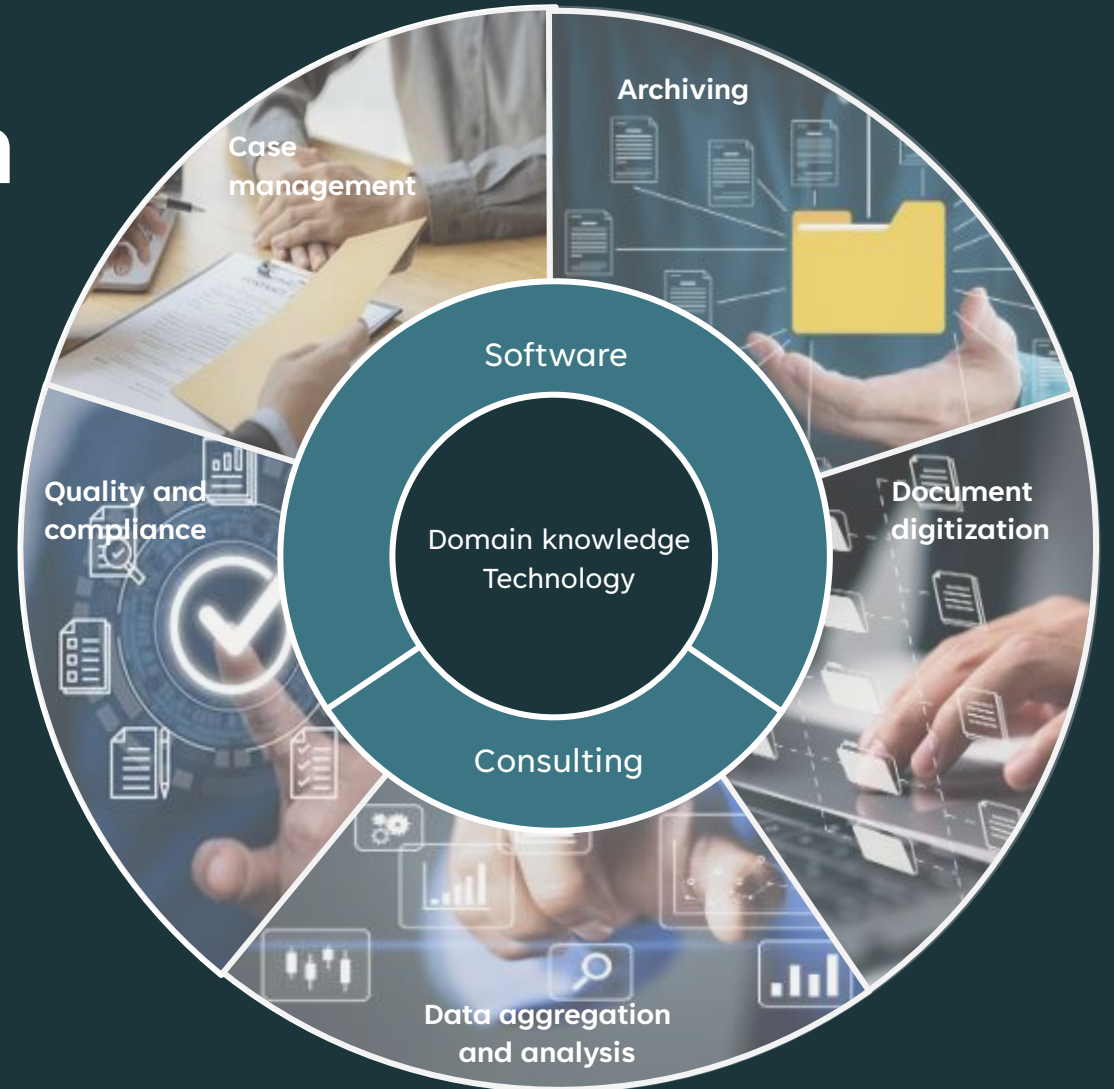
- iVerdi established as a separate segment
- Unbolt will be rebranded as **Spir Data** in Q1 2025, serving as a horizontal data services entity

- **Leveraging the strength of Spir Group**

- Unbolt acquisition unlocks new opportunities in the Nordic real estate market:
 - **Advanced Data Services:** Unlocking deeper insights and smarter decision making for our clients and partners
 - **Business Development Acceleration:** Seamless real estate strategy bundling
 - **Next-Generation Data Platform:** A one-stop solution for real estate intelligence and digital transformation

Public Administration

With its mission critical software and solutions, Spir Group is supporting Public sector with insight, control and digitalization of law regulated processes



Public Administration – Continued solid progress

Increasing sales to new customers in addition to up-sales to existing customers



Won 80% of the tenders in the quarter

Key wins with Nesodden Municipality and Karlskrona Municipality (Sweden)



Subsequent to the quarter Sikri won the Indigo IKS tender with a three-year MNOK 8.7 agreement and expansion options for seven more municipalities



Underlying ARR-growth of 12%¹ from increased sales to new and existing customers



A growing business delivering digital automation using AI and RPA (Robotic Process Automation) and solutions using AI for automated archiving



Public Administration



¹ Adjusted for extraordinary churn of MNOK 10 in Q1 2024



Outlook

Outlook

Continue to pursue our growth strategy

- High demand for secure and efficient IT solutions across both segments and steady growth in revenues
- High win rate and long-term customer contracts continues to generate steady growth within public administration
- Positive outlook in both the Norwegian and Swedish real estate market
- The Group plans to optimize investments to enhance margins, improve cash flow, and prioritize ROI, with a projected capital expenditure range of MNOK 90-95 for FY 2025
- Open data in Sweden in 2025 will impact revenue. However it opens opportunities within product development and the aim is to drive continued growth in gross profit
- Cost control and efficiency improvements continue to be key focus areas
- Solid building blocks in place and foresee continued growth in our software business for 2025



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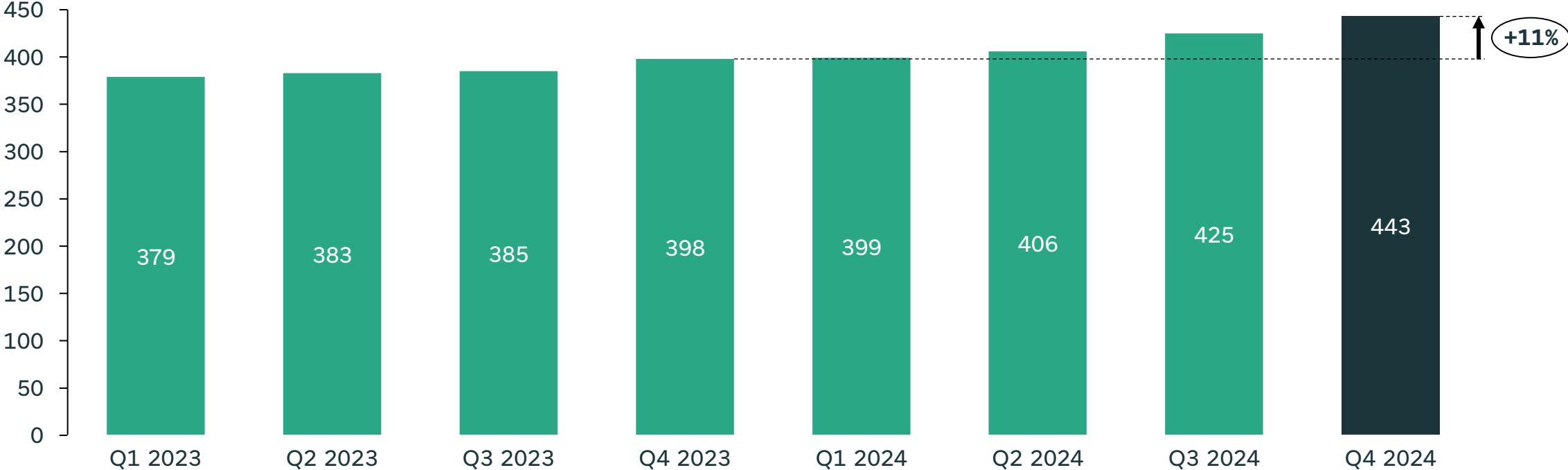
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Appendix

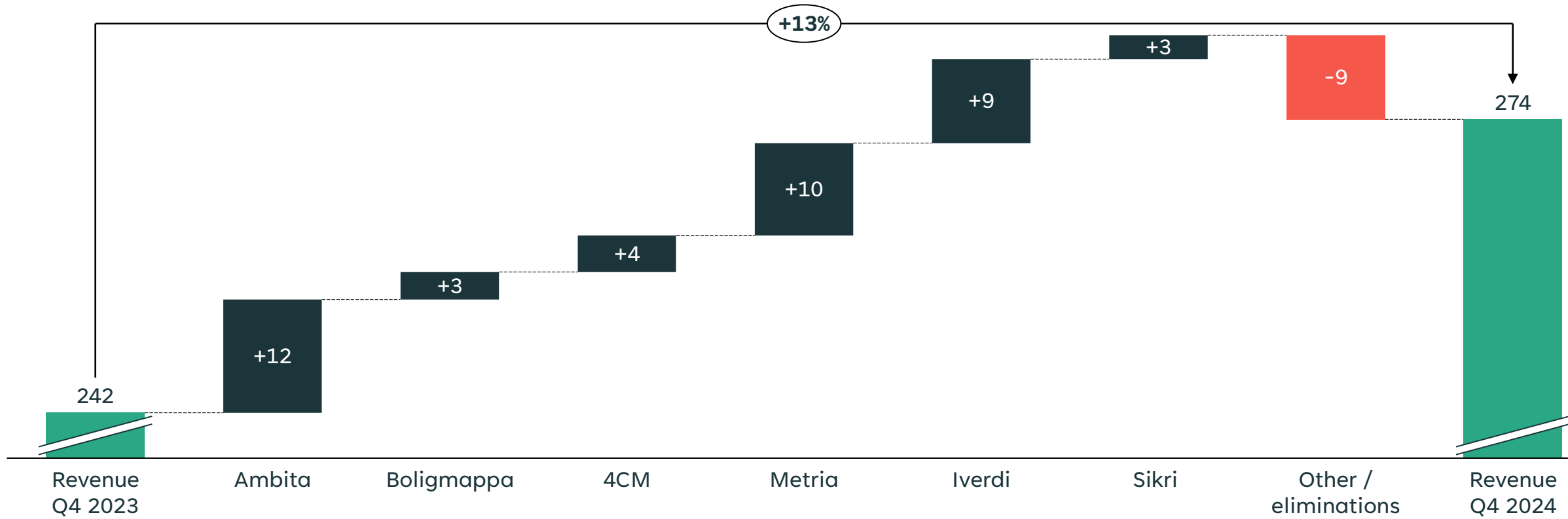
Historical financial proforma figures, adjusted for acquired and divested business

ARR growth 11% for Spir Group year-over-year

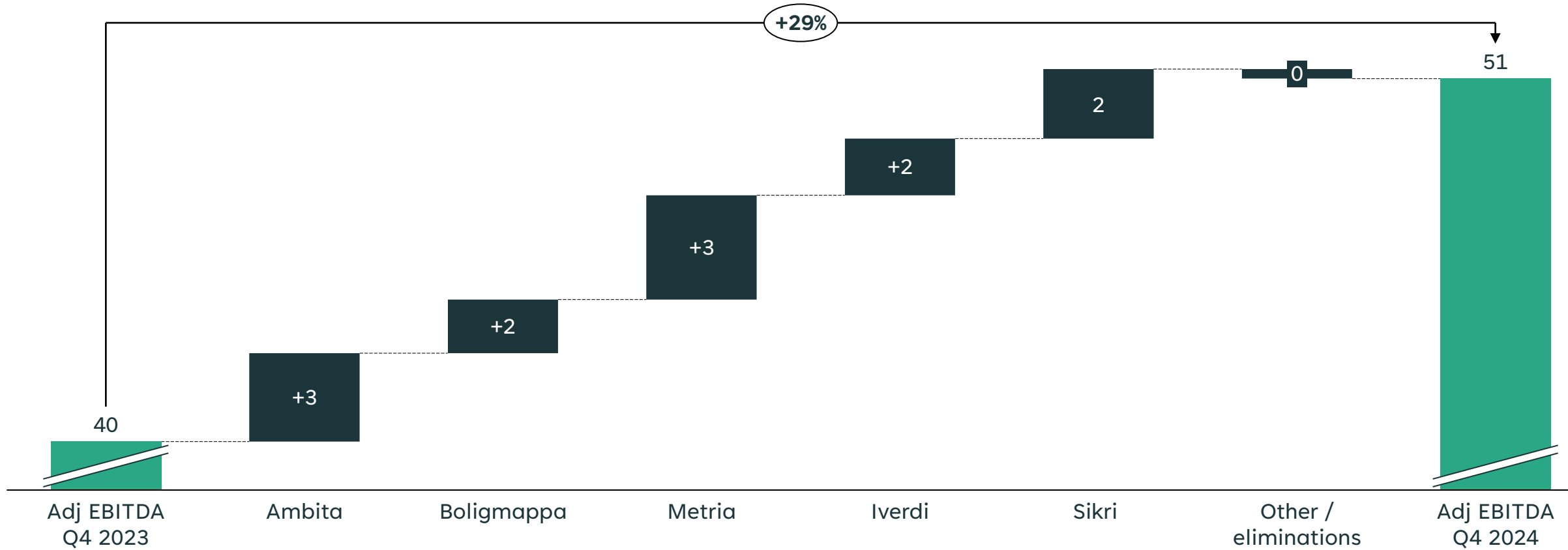
Annual Recurring Revenue (MNOK)



Revenue growth of 13% in Q4 2024



Double digit adj EBITDA-growth of 29% in the quarter



Updated proforma financials^{1,2}

Revenue (MNOK)	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Q4'24
Sikri	66	73	69	67	66	63	73
Ambita	137	115	82	109	153	127	94
Boligmappa	11	11	13	12	13	14	20
Metria	75	62	74	74	74	72	84
Iverdi	-	-	-	-	-	4	9
Other/elimination	0	3	3	1	2	2	-5
Total revenues	289	264	241	263	308	282	274

Gross Profit (MNOK)	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Q4'24
Sikri	56	57	60	59	59	56	65
Ambita	55	46	37	43	59	50	54
Boligmappa	10	11	13	11	13	14	21
Metria	47	38	47	45	43	43	52
Iverdi	-	-	-	-	-	3	6
Other/elimination	0	3	2	3	1	3	-11
Total Gross Profit	168	155	159	161	175	169	187

ARR (MNOK)	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Q4'24
Total ARR	383	385	398	399	406	425	443

1) Proforma figures adjusted for divestment of Metria Planning and Surveying.

2) Due to a historic accounting error in 2020-2023 in Ambita, the comparative figures for 2023 have been revised. The error specifically affects revenues, short-term liabilities, and equity. Revenue in 2023 is affected by MNOK 1.0.

Updated proforma financials^{1,2}

EBITDA (MNOK)	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Q4'24
Sikri	18	22	20	18	19	19	23
Ambita	30	22	11	13	33	21	16
Boligmappa	-1	1	-	-	-2	4	2
Metria	8	9	11	10	7	15	15
Iverdi	-	-	-	3	6	1	2
Other/elimination	-6	-6	-8	-8	-3	-6	-6
Total EBITDA	49	48	34	36	60	55	51

Adjusted EBITDA (MNOK)	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Q4'24
Sikri	18	23	21	18	19	20	23.0
Ambita	30	22	11	13	33	22	13.5
Boligmappa	-1	1	"	-	0	4	1.7
Metria	11	11	13	12	9	15	16.7
Iverdi	-	-	-	3	6	3	1.8
Other/elimination	-5	-6	-5	-11	-8	-7	-5.5
Total adjusted EBITDA	53	51	39	35	59	57	51.2

Cash EBITDA (MNOK)	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24	Q4'24
Sikri	10	14	10	10	11	13	12
Ambita	26	18	11	10	28	18	12
Boligmappa	-7	-4	"6	"6	-5	-1	-4
Metria	4	5	5	4	1	11	9
Iverdi	-	-	-	-	-	-	-1
Other/elimination	-7	-8	-11	-9	-4	-8	-9
Total cash EBITDA	26	25	9	9	31	33	20

1) Proforma figures adjusted for divestment of Metria Planning and Surveying.

2) Due to a historic accounting error in 2020-2023 in Ambita, the comparative figures for 2023 have been revised. The error specifically affects revenues, short-term liabilities, and equity. Revenue in 2023 is affected by MNOK 1.0.

A SPIR COMPANY

About Ambita

- Number #1 positions with trusted solutions
- Ambita's offerings are used in 9 of 10 transactions in Norway
- Software services that connects real estate agents, banks and insurance companies
- At the forefront of digitizing the settlement process in real estate transactions
- Driving innovation and propelling the real estate market forward
- Transaction-based revenues correlated to the real estate market and seasons

ambita



Leading digital real estate and construction software in Norway, enabling digital transformation and services:

ambita

Tinglysingstjenester

Digital samhandling

Byggesøknaden

Eiendomsinformasjon

Infoland

Karttjenester

Propfinder

Digital planvarsling

A SPIR COMPANY

About Boligmappa

- Boligmappa is a digital platform where property owners and professionals can find, store and share data and compulsory documentation about a property
- Hjemla provides automatic property values, price statistics and market information to empower data-driven decisions in the housing market
- Boligmappa and Hjemla is available for all homeowners free of charge with the possibility to upgrade to premium offerings
- Since their inception Boligmappa (2012) and Hjemla (2023) have attracted more than 1 million unique registered users
- High attention from media, politicians and key industrial players



A digital platform connecting all sides of the housing and real estate lifecycle, from private homeowners to large professional contractors:



A SPIR COMPANY

About Unbolt

- A Nordic ecosystem around property condition data, providing unique insights and analytics about the building stock
- Delivers the software Ivit, Norway's most used professional software for valuation engineers through the subsidiary Iverdi
- The software offers effective process support, data-driven quality assurance and a variation of different valuation reports and allows direct interaction and sharing of information between real estate agents and valuers' systems for increased security and efficiency

unbolt

 Spir Group

A data and analytics platform to support faster and more sustainable decision making in the construction and property industry

unbolt

VERDI

BUILDFLOW™

REDUCE

DOMUSPECT 
- det digitale flyttesyn

About Metria

- #1 position in Sweden within real estate information and geodata with key customer verticals within; Public sector, Bank & Insurance, Energy & Telecom and Forestry industry
- Digital solutions and services within geodata, real estate information, geographical information systems and remote sensing
- Exciting climate & environment offering – identification of climate risks and opportunities for reduced climate impact
- Revenue mix of transactional, SaaS and consultancy revenues. Transaction based revenues correlates to size of mortgages and properties sold

Metria is an expert in geographic information and digital solutions:

- Information services
- SaaS solutions
- Expert analysis
- Customer specific IT solutions

A SPIR COMPANY

About Sikri

- Mission critical software for public administration and seamless processes mandated by law
- Case processing, building applications, archiving, document management, data collection and handling
- Key player and strong #1 positions
- Revenue with high ARR, long-term SaaS agreements & solid customer base
- Consulting revenue related to implementation and customer excellence
- Assist public administration with reaching its goal for efficient use of resources, and improving citizen services
- Digital counting solution for elections in Norway – next up VALG2025



Providing mission critical software for public sector:



