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Krisen rammer forskelligt i it-branchen

På trods af flere års vækst har software og it-servicebranchen oplevet en nedgang i aktiviteterne i 2009, hvor den globale omsætning for disse segmenter er faldet med 3 % til €635 milliarder, viser seneste tal fra Euler Hermes Kreditforsikring.

Denne tilbagegang er forholdsvis begrænset set i forhold til mange andre brancher. Lige som brancherne er påvirket forskelligt af krisen, gælder det også de forskellige segmenter i it-branchen: omsætningen i konsulentsegmentet er faldet kraftigt, mens outsourcing og it management har vist sig modstandsdygtig over for krisen, bortset fra i USA og i Storbritannien, hvor disse aktiviteter allerede er veludviklede. It management, som nogle aktører har gjort til deres speciale, tegner sig for omkring 20 % af markedet. De fleste indgår flerårige aftaler, som har vist sig værdifulde for en stabil omsætning.

It services vil fortsat være under pres i 2010

Det globale marked for software og it-services tegner sig for 68 % af verdens samlede it-udgifter i 2009. Efter at være kommet ovenpå efter it-boblens kollaps i begyndelsen af årtiet, har segmentet for it-services præsteret en gennemsnitlig årlig vækst på mere end 6 % i flere år i træk. Dermed har segmentet bidraget mere til stigningen i virksomhedernes it-udgifter end køb af udstyr har.

Euler Hermes forventer, at den samlede omsætning for hele it-branchen i bedste fald vil forbedres gradvist i 2010 og stige med 1,5 % til €645 milliarder. Væksten vil primært være i de nye vækstøkonomier, og derfor vil mange virksomheder inden for it-services fortsat være under pres og være tvunget til at skære i priserne samt sænke marginer. Derudover forventes en konsolidering i markedet.

Et koncept, som Euler Hermes, vurderer, at der skal holdes et vågent øje med i 2010, er "Cloud computing" – et internetbaseret koncept, der giver brugerne adgang til computerinfrastruktur, tjenester, processorkraft, datalagring og applikationer på fjernservere via internettet og som faktureres efter brug. Det er dog svært at

Major world IT services companies

Ranking	Company	Country	H1 2009	H1 2008	Change
1	IBM services and software	USA	18.4	20.4	-9.8%
2	HP/EDS	USA	18.7	10.7	(*)
3	Accenture	USA	11	13	-15.4%
4	Fujitsu	Japan	13.4	14.4	-6.9%
5	CSC	USA	8	8.5	-5.9%

(*) acquisition of EDS and reclassifications
Sources: Companies, Euler Hermes SFAC

IT services: market growth, by zone

Euro billions	2008	2009 ^(*)	Change
North America	278	268	-3.6%
Europe	239	234	-2.3%
Asia-Pacific	105	102	-2.7%
Latin America	21	21	-2.4%
Africa & Middle East	11	11	-1.8%
Total	654	635	-2.9%

Source: IDATE, Euler Hermes SFAC forecasts

Euler Hermes Kreditforsikring

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Euler Hermes has developed a credit intelligence network that enables it to analyse the financial stability of 40 million businesses across the globe. The group protects worldwide business transactions totalling €700 billion.

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