

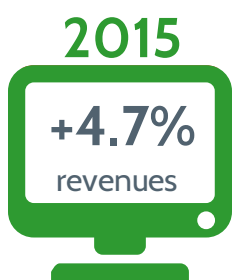
INFORMATION & COMMUNICATION TECHNOLOGIES

Forecasts for 2016

6% share in global GDP



Long term growth sustained by digitalization



KEY FACTORS

- Digitalization processes
- Increasing importance of connectivity
- Development of interconnected systems and objects: "Internet of Things"

GLOBAL POSITIVE OUTLOOK FOR THE SECTOR



63/72

country industries worldwide exhibit low or medium risk



1 producer & consumer of IT products and services

37%

market share

Software & services

Consolidated turnover

\$ 3.8 tn

Firms require more data management solutions and security services



now → 2018
Big Data market x 3

Hardware & components

Consolidated turnover

\$ 1.3 tn



New material equipment increasingly challenged by fierce price pressures weighing on margins

2000 → now
Price of electronic components / 2 despite higher sophistication

Pressures on the sector: 4 things to watch

1



INNOVATION

Need to constantly renew the goods and services offered

3



M&A

Frequent mergers and acquisitions weakening medium sized companies

2



TECH BUBBLE

The current phase of digitalization could increase the risk of a tech bubble

4



PRICES

Retailers and manufacturers having unequal purchasing powers

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Source: Economic Outlook [Let the sector games begin](#)



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