

FIP-2009-0020 (144 , 2009. 08. 25)

서비스산업 전략보고서
IT서비스산업 발전전략과 과제

ISSUE
PAPER

● ● ● 요약 ● ● ●

(IT) ('09.5.8)

IT '12 33

IT ,

IT ,

IT ,

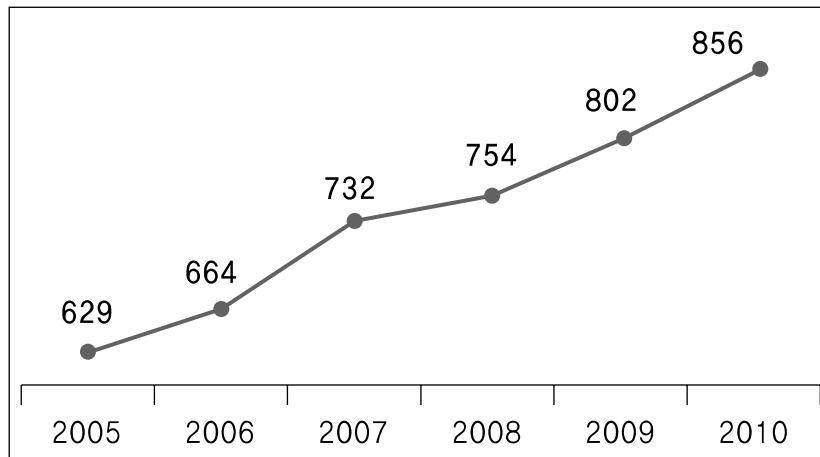
* IT (20.6%) IT (3.2%) (3.0%)

(32.9%) (21.7%)

IT 2005 6,300

2010 8,560 , 2012 9,914

< IT >



* : Gartner('09, '10)

IT , LCD IT

, IT IT

2%

● ● ● 요약 ● ● ●

< 3 IT ('08) >

			(:)		
1	SDS	20.30%	2,519,425	87,826	3.49%
2	LG CNS	16.13%	2,001,581	78,291	3.91%
3	SK C&C	10.27%	1,275,185	21,646	1.70%
		53.30%	(IBM, ,)		

* : (SDS , 1,500
10%

IT

IT 1990 , IBM IT

Accenture 2000

IT

IT

HP IT

EDS

IT

IT

IT

*

73.3

(IT 37)

Green IT, u-Health IT

*

IT
Green IT, u-Health, SaaS, RFID/USN, u-City

● ● ● 요약 ● ● ●

(SI), (SM) IT , ‘ ’

IBM

* , IT
40% IBM IT

IT

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‘ ’

* ‘ ’ , ,

(Value Based Pricing)

* (Function Point) :

(SW)

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SW

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* : (SI) (SW)

, SW SI

, SW

SI

IT

IT

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Green IT, u-Health,

SaaS, u-City

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IT

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(IT) ('09.5), ('09.5) , ('08.10)

IT , u-Health, e-Learning,

2012 33

IT

IT

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IT

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2008

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800

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18 (2%)

IT

IT

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1. IT

(IT IT) , IT
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* IT :

(IT)

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2 1)

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< IT

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Gartner	IT , , , , ,
IDC	, ,
OECD	IT , .

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< IT

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	IT	ISP()	
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			,
			,
			,
		IT	,
	SW		,
		SW	
	DB	DB	DB
			HW
			OS
		SW	
			,
	ITO	IT	, HW,
	BPO	IT	
	APO	SM	
IT	IT	IT	IT
	IT		IT
	IT		IT

* : IT

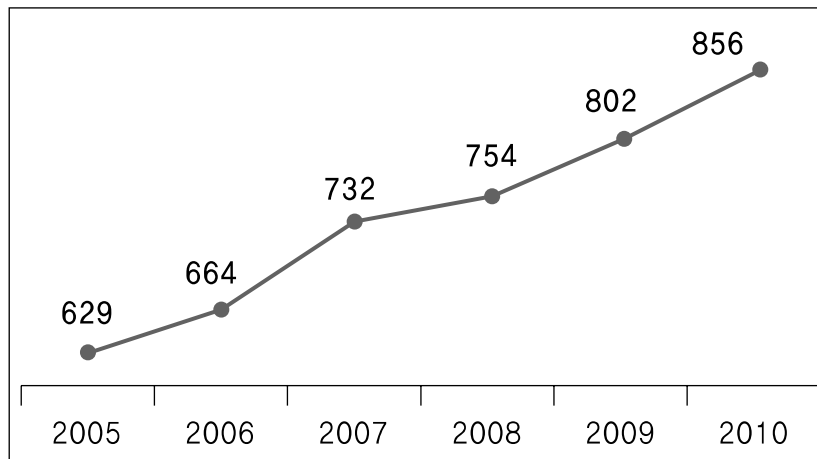
2. IT

(1) IT

IT 2010 8,560 2005 6,300 , 2012 9,914

IT

< IT >



	'05	'06	'07	'08	'09 (E)	'10 (E)
IT	629	664	732	754	802	856
SW	146	156	169	183	197	212
HW	363	366	372	378	383	388
	1,137	1,187	1,273	1,314	1,382	1,455

* : Gartner

IT 6% ,

* HP(Hewlett Packard) IT EDS ('08)

IT

IT () ,
() IT

IT 21.2% , IT
8.3% OECD

3 (SDS, LG CNS, SK C&C)

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2% ('08)

< IT ('08) >

			(:)		
1	SDS	20.30%	2,519,425	87,826	3.49%
2	LG CNS	16.13%	2,001,581	78,291	3.91%
3	SK C&C	10.27%	1,275,185	21,646	1.70%
		53.30%(IBM, ,)			

* : (SDS , 1,500
10%)

* : IT (IT 36)

< IT ('08) >

:

		('08)			('08)
1	SDS	2,519,425	19		141,488
2	LG CNS	2,001,581	20	KB	133,287
3	SK C&C	1,275,185	21	CJ	128,319
4	IBM	1,261,211	22		132,967
5		493,472	23		112,517
6		409,582	24		94,369
7		384,380	25		85,216
8		298,701	26	ITMEX SYI	75,107
9		274,290	27		72,433
10		269,156	28		71,712
11		267,306	29	DK	71,013
12		245,270	30		67,925
13	IDT	240,647	31		66,139
14		226,219	32		60,114
15		209,417	33		43,907
16		201,319	34		39,620
17	CNI	189,304	35		38,909
18	I&S	174,116	36		35,895

* : IT

3. IT

() IT 7,327 ('07) ,
 , LCD
 IT (2,500), (1,200)
 , 1.1% ('07)
 - IT , LCD
 , IT

< IT ('07) >

			LCD	IT
	2,496	1,200	320	7,327
	45.1%	23.0%	46.5%	1.1%

* : IDC

()IT (20.6%) IT ()
 1.8%)
 IT ,
 - IT IT

< IT >

:

	'93	'95	'00	'05	('93~'05)
	12,245	13,634	13,604	15,148	1.8%
	3,885	3,709	3,333	3,451	-1.0%
	7,589	8,806	9,496	10,799	3.0%
IT	416	481	657	751	5.1%
IT	340	377	429	497	3.2%
IT	17	36	125	161	20.6%
	59	68	103	93	3.9%

* : IT

IT

< IT >

		'95	'00	'03
		10.21	4.87	4.19
		9.69	4.38	3.77
IT		21.49	11.31	8.74
		17.72	10.36	8.07

* :

()SW IT

'02~'05

(SW) IT

(/

) 32.9%

21.7%,

11.5%

< IT >

:

	'02	'03	'04	'05	
	3,742	4,262	4,689	5,323	18,015
	12,203	12,788	13,711	16,003	54,705
/	30.7%	33.3%	34.2%	33.3%	32.9%

< >

			IT
('02~'05)	21.7%	11.5%	32.9%

* : IT

IT

- IT

,

< >

		'95	'00	'03
		0.65	0.54	0.55
		0.74	0.72	0.73
		0.92	0.92	0.90
IT		0.90	0.90	0.85
		0.93	0.90	0.91

* :

IT

1. IBM

➤ IT

1911 IBM 1980
IT

1965~1985 14%
- IBM (System Service Div.)
, IBM

'80 PC , UNIX
, '90

- IT ,
()

- 1991 6%
, '93 81

* 1990

'93 (Lou Gerstner) CEO ,

IT
HW ,
SW

- IBM '97
AT&T (50) , '02 PC
-SCI (37)

- IBM
Lotus Tivoli , SW
, SAP

IT

- 1996 'IBM (Global Services)'
 - IBM Global Services 1990 IT
 , 2001 IT IBM
 IT
 * '93 27% , '01 58%

2. Accenture

➤ IT

2000 IT
 2000 Y2K IT IT ,
 - '00~'03 IBM GS 5.2%, EDS 1.5% , Accenture
 1990 24% 2000 6%
 - ITO·BPO* '04 8%
 * ITO(IT Outsourcing) : IT
 * BPO(Business Process Outsourcing) :
 Accenture, LG CNS BPO
 * (Outsourcing)
 * 1913 (Arthur Andersen)
 (Andersen Consulting) , IT
 (Accenture)
 - '02~'07 , 75,000 (75%)
 - IT (Consulting)- (SI)-ITO·BPO
 IT Full Line Value Chain , ()
 - Global Delivery * ,
 * Global Delivery : , , , 24
 35,000

- , (pool) ,
 ATS(Accenture Technology Solutions)
- (Navisys), (Digiplug) ,
 BPO Savista* BPO ('06)
 * Savista : 12,000 BPO
- BPO
- (Outsourcing)
- 16%('00) 40%('08) , 2004~2007
 12.9%
- Navisys, Savista BPO
 2.8%('02~'03) 5.3%('04~'07)
- * 2004 IBM, EDS 2

3. HP

➤ EDS IT (IT) ,

(HW)

HP 82.2% , '03~'07
 IBM 9.4% , HP 4.9%

< HP ('07) >

		('07)	(%)
HW	Enterprise Storage and Server	18,769	18.0
	Personal Systems	36,409	36.9
	Imaging and Printing	28,465	27.3
		83,643	82.2
SW	HP Services	16,646	16.0
	HP Software	2,325	2.2
	(,)	1,672	1.6
		104,286	100

* : HW

5 IT EDS (220) IT

IT

- ITO (, , ,), BPO (Healthcare, Financial Processing, CRM/HR Outsourcing), ,

- HP ITO BPO

- , HW 66.1%, 30.7%, 3.2%

IT , ,
IBM

IT Full line , HP

-

- HP B2B , ,

EDS IT IBM HP

- IBM . , IBM

- '07 IBM , EDS 1

< HP IBM >

:

	2006			2007		
IBM	91,424	49,318	9,492	98,786	54,144	10,418
HP	91,658	16,241	6,198	104,286	16,646	7,264
EDS	21,311	21,311	470	22,134	22,134	716
HP+EDS	112,969	37,552	6,668	126,420	38,780	7,980

IT

1. IT

IT

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- (Head Counting)* ,

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IT

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- IT

IT

2.

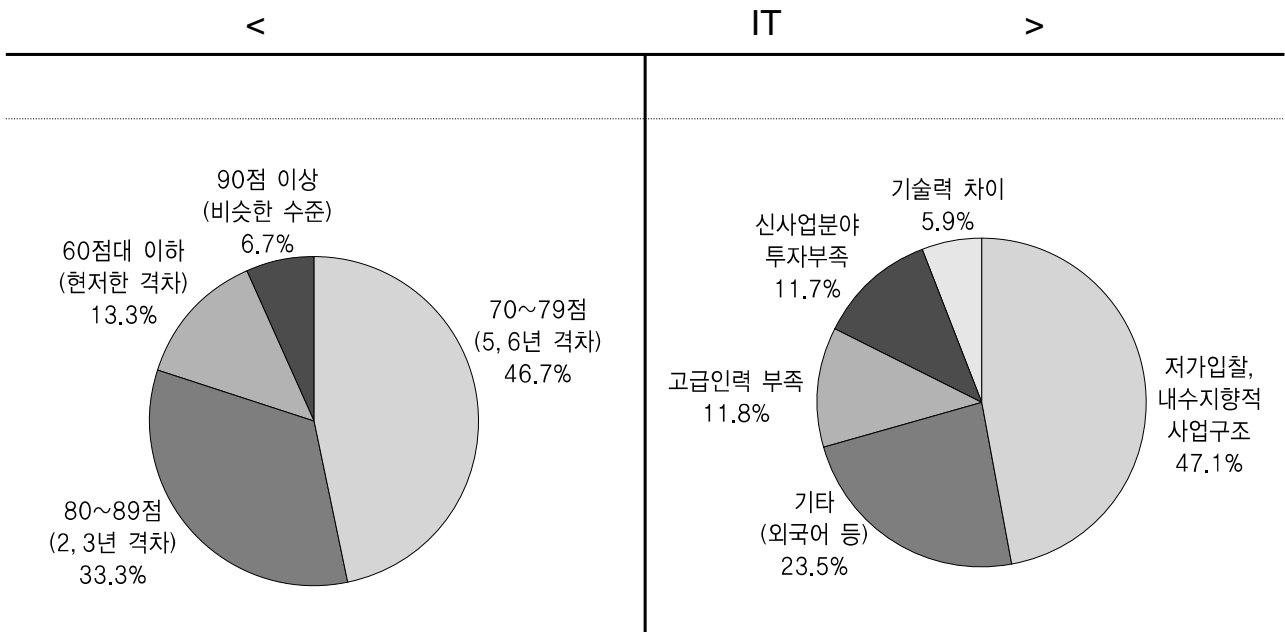
IT ,
 - IT '07 59.5 '12 76.6
 5.2% (IDC) , '08

< IT >	
	'05~'06
	20.79%
	'06~'07
	13.93%
	'07~'08
	9.02%

- 2007 IT 7,327 (732 7,000)
 IT 3 (SDS, LG CNS, SK C&C) 5 5,920
 , 0.76%

* ('09.6.26), IT
 , 70 , 60
 13.3% (73.3)

* (47.1%) [P.23]



* : IT 37

IT

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IT

- , 1 SW 50 , HW 10
IT SW

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- ,

- (SDS, 110),
(LG CNS, 560)

IT

- 6 IT , () IT

, IT

IT

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3. IT

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* GM, ,

- +IT 2,890 , , +IT
 400 , Health+IT 236 , BT+NT+IT
 1000 (2012 , ETRI)
 * , IT Green
 IT, u-Health, SaaS(Service as a Service), RFID/USN, u-City [P.23]

1	Green IT	25%
2	u-Health	15.9%
2	SaaS	15.9%
3	RFID/USN	13.6%
3	u-City	13.6%

(u-Health) ,

,

IT

SOC

Smart SOC

,

IT+Green+SOC

- Smart SOC

Smart SOC 300 ,
 (Smartway)*

* Smartway :

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10 , ,

, RWIS(Road Weather Information System)

4

IT

- 4

IT

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- IT 0.7%(3,400) , IT
IT

4. IT

, , ‘ , ’

(SI)

IBM IT

- () ()

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*

40% IBM IT
(25%), IT (20%) [P.23]

1	(, , , HW) : IBM	40%
2	(SM,)	25%
3	()	20%
4	(ISP,)	10%
5	IT ()	5%

. IT

1.

(1) (Function Point)

[]

(Head Counting) MM(Man
Month)

- MM

- ()

IT

- ' ' (Function Point)

- IT SW

1
(ISO/IEC 14143) 'SW' ('09.5.20)

[]

' ' (SM) ' '

-

, IT

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(Value Based Pricing)

(2)

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IT (RFP, Request
for Proposal) ()

-
(Head Counting)

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2.

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SW

, IT

SW,

SI()

- ()

('09.3.5)

10

SI

SW ,

SI

SW

- (SI) ,

- , SW

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SI

- IT (SI)

- (SI)
(RFP)

-
(System Integration)

3. ()

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IT

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- () ,

- , '08 87.8%

- IT , ()

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IT IT () ()

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4. ,

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IT

IT

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* , ‘ , ’

* ‘ (Hi-Pass)’ ETCS

7~8 2007

- IT

IT

* IT

IT

- RFID, USN, SOA, SaaS, Cloud Computing

* IT SW , IT

[]

, IT

IT

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u-Health, SaaS, u-City

Green IT,

*

,

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IT

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	< IT >
	(Function Point)
	IT
,	Green IT, u-Health
	IT

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국내 IT서비스산업 관련 설문조사 결과

< >

: 2009. 6. 16()~6. 26()

:

: IT 37 (20)
()

1. IT (83.3%)

IT ?

No	Content	Percentage
1	(,) : IBM	40%
2	(SM,)	25%
3	()	20%
4	(ISP,)	10%
5	IT ()	5%

2. IT .
IT ?

No	Content	Percentage
1	70 ~79 (5,6)	46.7%
2	80 ~89 (2,3)	33.3%
3	60 ()	13.3%
4	90 ()	6.7%

* : 73.3

3. 2 ?

1	,	47.1%
2	(,)	23.5%
3		11.8%
4	SI, SM ()	11.7%
5		5.9%

4. IT
?()

1	Green IT	25%
2	u-Health	15.9%
2	SaaS	15.9%
3	RFID/USN	13.6%
3	u-City	13.6%

