

ICT SUMMIT 2010  
17 February 2010



# International ICT Industry Summit on ICT Economic Stimulus, Employment and Investment Policies

Information Technology  
Outlook 2010

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# 2010 Outlook Overview

- Macroeconomic outlook improved since mid-2009, OECD slow and hesitant, Asia “boom”
- Macroeconomic and ICT sector projections successively revised upwards
- Business confidence picking up but still low
- Unemployment up in 2010 - pressure on consumer expenditures, business sentiment low
- Government budget deficits are historically high

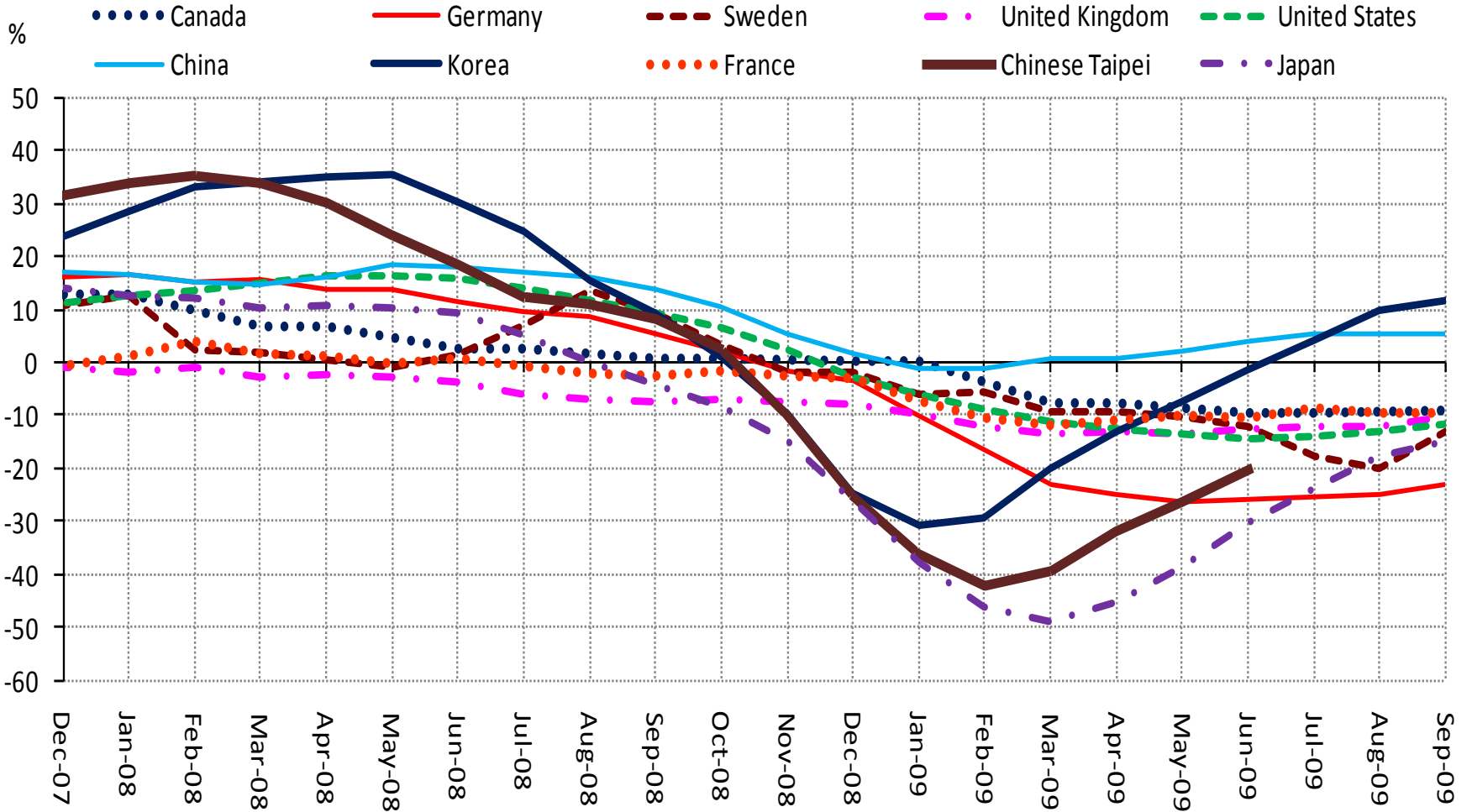
## 2010 Outlook Overview

- OECD ICT sector near-term outlook: 2009 negative, 2010 2-3% growth, 2011 improve more
- ICT employment: production and markets fell in 2009 => employment falling 2010
- ICT markets shifting to non-OECD economies - around one-quarter of global markets, and top 250 ICT firms increasingly non-OECD
- Will non-OECD economies remain decoupled from OECD countries?
- Long-term performance: new goods and services for business and consumers, e.g. mobile services

# ICT goods – output growth

December 2007-September 2009

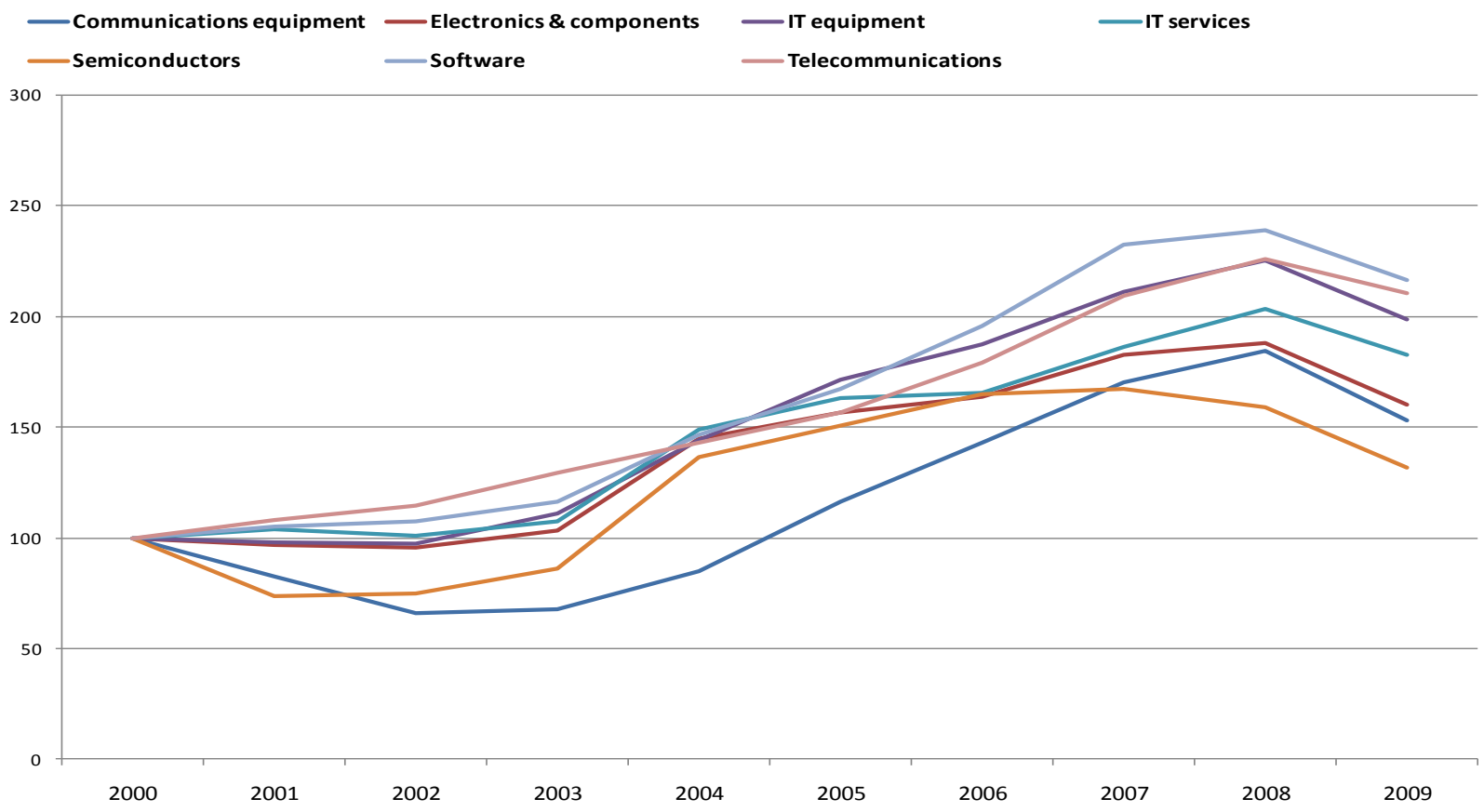
Year-on-year percentage change, 3-month moving average



Source: OECD Information Technology Outlook 2010.

# Top 250 ICT firms' revenue trends by sector 2000-2009<sup>1</sup>

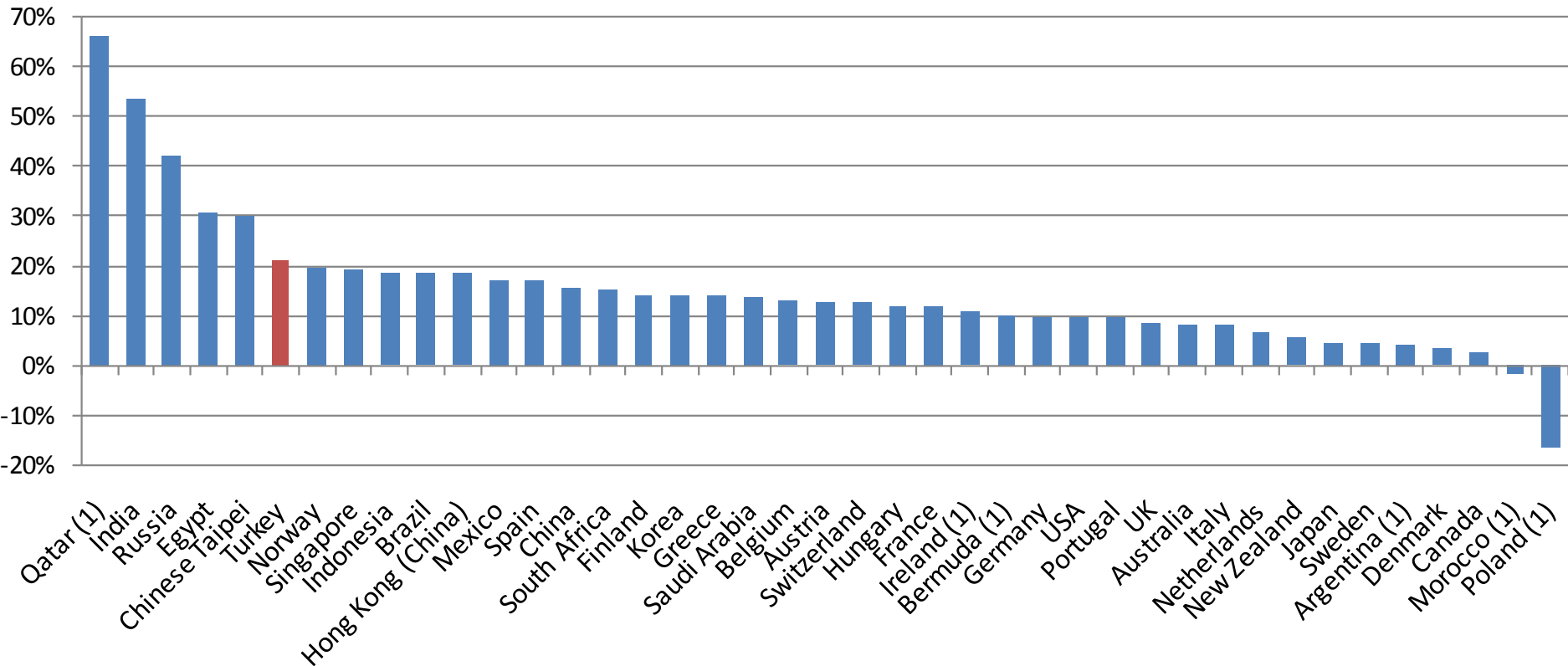
Index 2000 = 100



Note: Figure does not include Internet firms which had a revenue increase by more than 800% in 2008 compared to 2000.  
 1. Data for 2000 to 2004 are based on the ITO 2008 panel of 250 firms. Values for 2009 are estimated based on firms' interim reports.  
 Source: OECD, Information Technology database, from annual reports, SEC filings, market financials.

# Top 250 ICT firms' revenue growth by economy of registration, 2000-2008

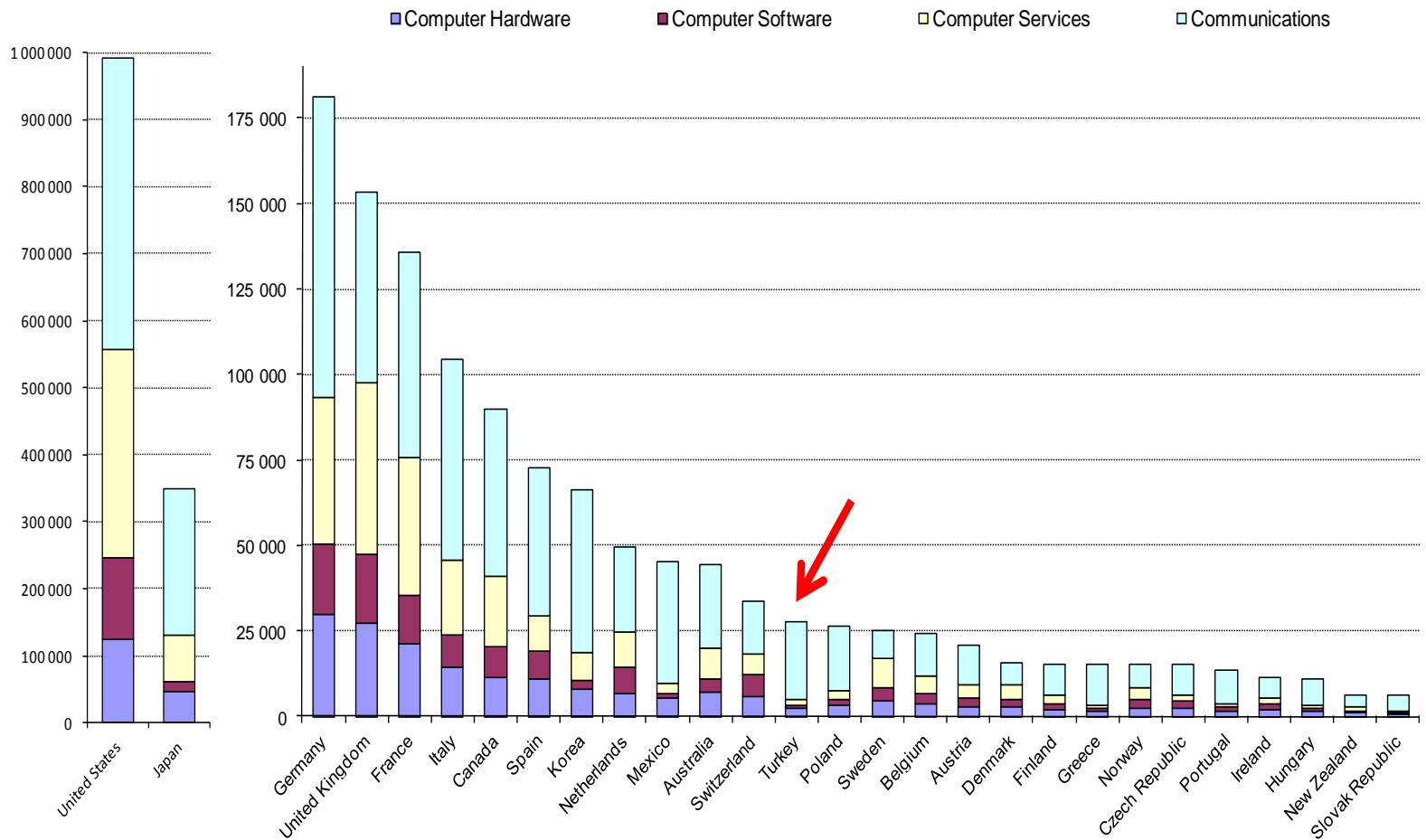
Average annual growth, percentages



1. 2004-2008 average annual growth rates.

Source: OECD, Information Technology database, from annual reports, SEC filings, market financials.

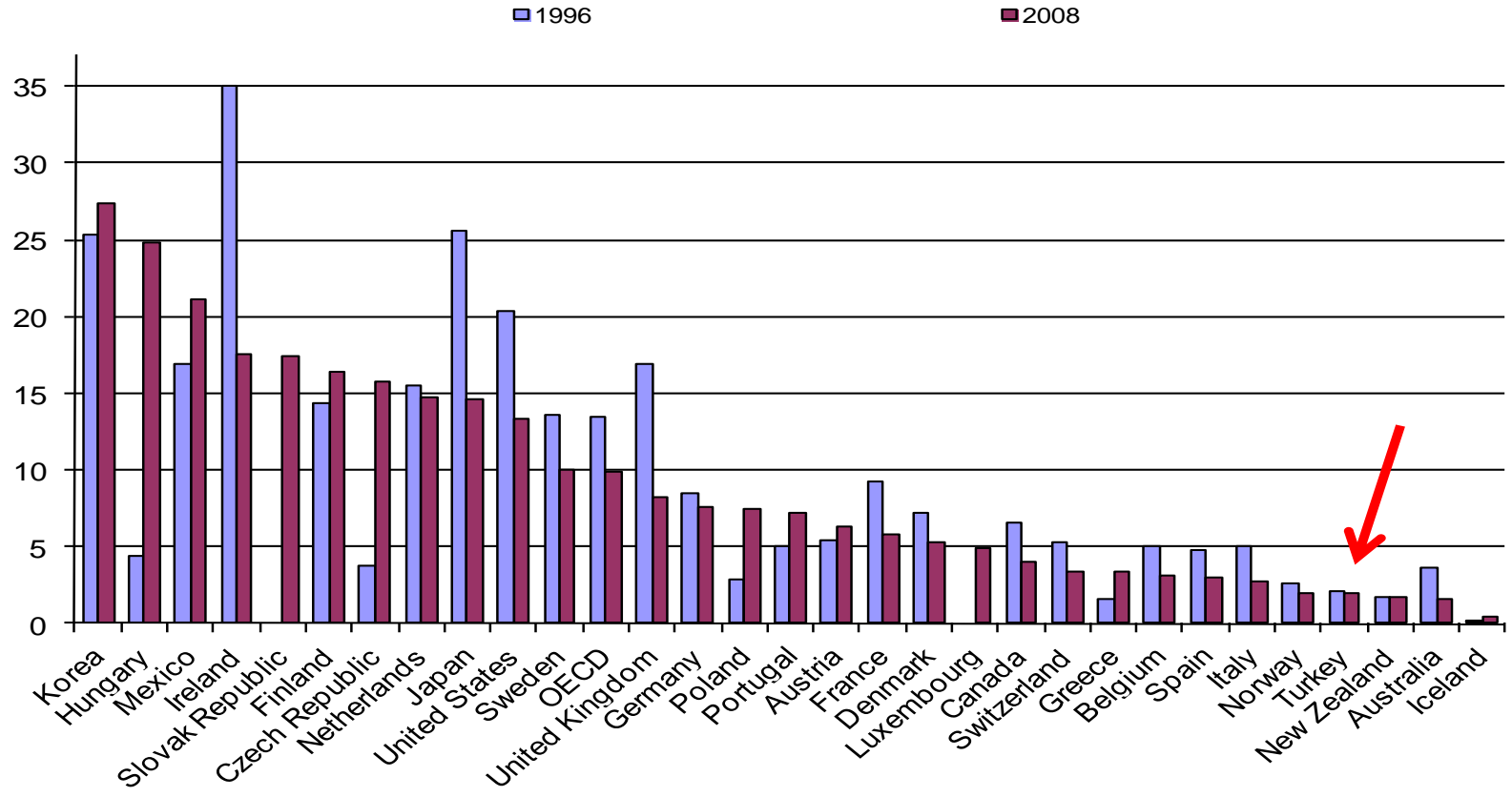
# OECD ICT spending by market segment, 2009



Source: OECD Information Technology Outlook 2010.

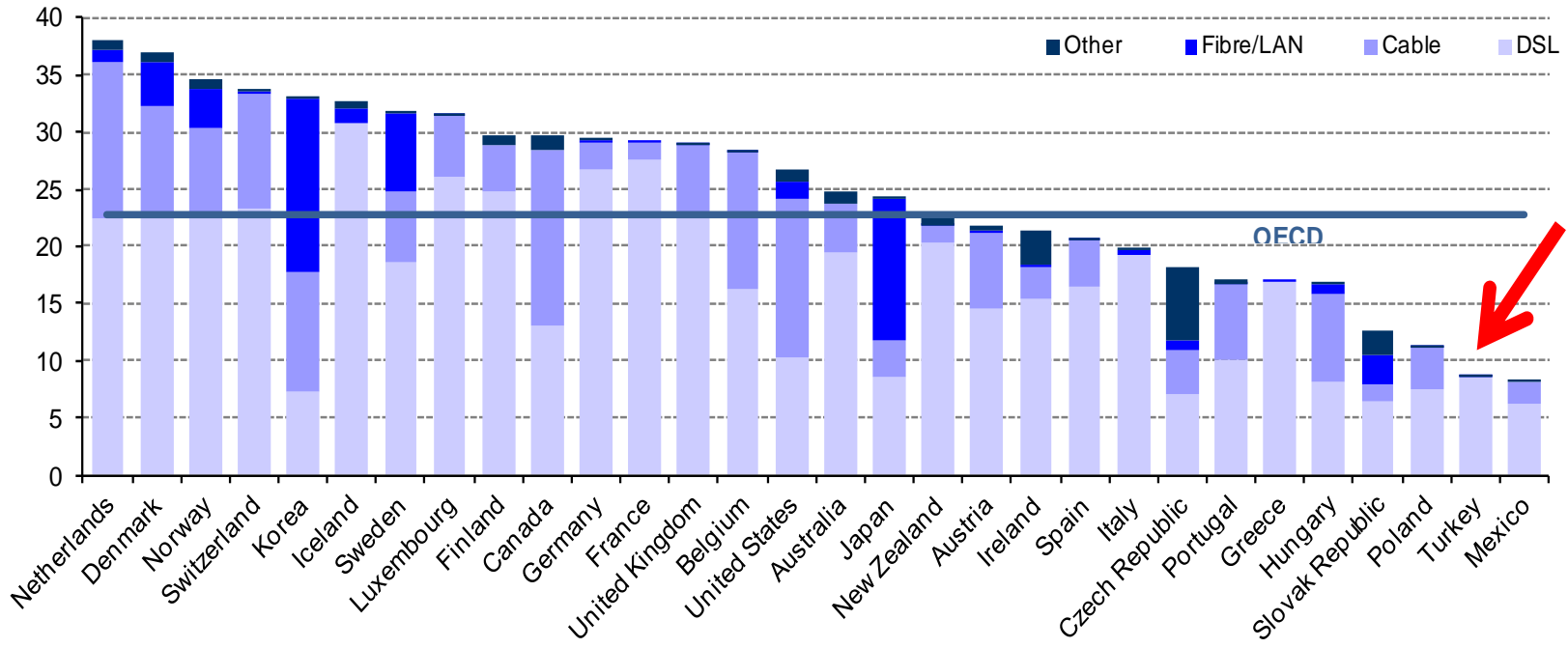
# Share of ICT goods in total merchandise exports, 1996-2008

percentages



Source: OECD Information Technology Outlook 2010.

# OECD broadband subscribers per 100 inhabitants, by technology, June 2009



Source: OECD Broadband Portal January 2010.

# What are OECD governments doing in turbulent times?

Policy area	Crisis priority
1. <b>ICT skills and employment</b>	15
2. <b>Broadband diffusion</b>	14
3. <b>Enabling environmental impacts of ICTs</b>	11
4. <b>Innovation networks and clusters</b>	10 each
<b>Technology diffusion to businesses</b>	
<b>R&amp;D programmes</b>	
<b>Venture finance</b>	

Recovery

*Basis: 23 countries indicating at least one ICT policy area with increased focus for economic recovery.*

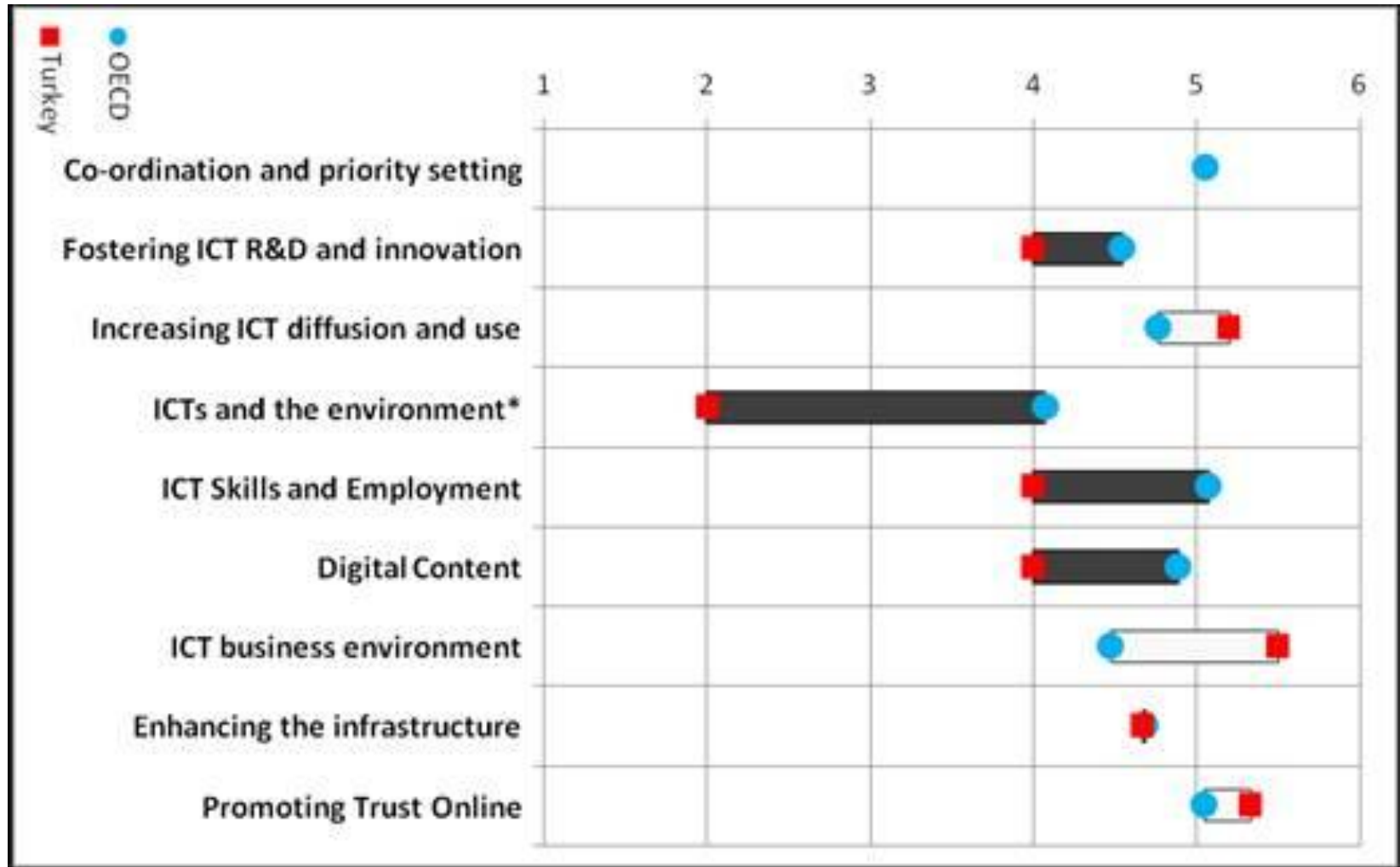
Policy area	High priority	Increased priority
1. <b>Security of information systems and networks</b>	23	11
2. <b>Broadband diffusion</b>	21	9
3. <b>Government on-line</b>	21	8
4. <b>ICT R&amp;D programmes</b>	17	11
5. <b>Innovation networks and clusters</b>	17	8
<b>Enabling environmental impacts of ICTs</b>	10	15

Overall

*Basis: 27 responding countries.*

# How is Turkey performing?

## ICT policy priorities, OECD and Turkey, 2010



# Did the crisis change anything?

## ICT priority responses

- Areas where **Turkey** indicated increased priority in response to the economic crisis:
  - ICT skills and employment
  - Broadband diffusion
- Most prioritised areas across OECD countries:
  - ICT skills and employment
  - Broadband diffusion
  - Enabling environmental impacts of ICT (“Green ICTs”)
  - R&D programmes, Venture finance, Innovation networks and clusters, Technology diffusion to businesses