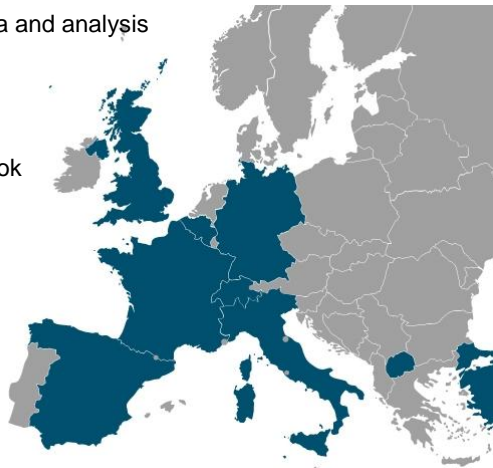


## What is EITO?

European Information Technology Observatory



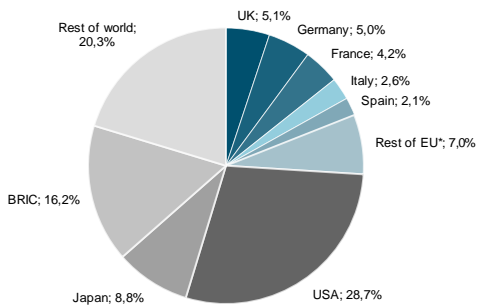
- Provider of ICT market data and analysis
  - 35 countries
  - 80 segments
- 1993 – 2007: EITO yearbook
- Since 2008: Online portal
- Cooperation with major ICT industry associations in Europe (see map), the European Commission, and the OECD
- Research partners: IDC, IDATE, GfK



## EU is second largest ICT market



Worldwide ICT market 2011 by country/region: 2579 bln. € (+3.5%)



Source: EITO in collaboration with IDC, IDATE; excluding BPO and Consumer Electronics \* EU without Malta, Cyprus

## Economic uncertainty affects ICT spending



- EU sovereign debt crisis affects economic performance resulting in weaker than expected ICT spending
- EITO expects EU ICT market to return to growth in 2012 after moderate decrease in 2011
- IT equipment market declines due to weak PC sales (while Tablets rocket upwards)
- Software market continues to drive growth
- Innovations stimulate the market (cloud, mobile Internet, embedded systems, ...)

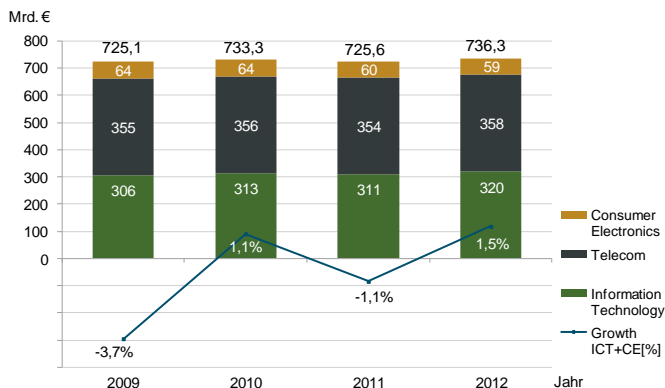
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## EU ICT market affected by economic slowdown



### EU\* ICT market 2009-2012



Source: EITO in collaboration with IDC, IDATE; \* EU without Malta, Cyprus

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