



Grow more 

## IT Sector's Share in Building Local Economies

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**IT Sector as a growth potential  
industry in today's economic context**

**Software industry as a provider of  
productivity tools to support other  
sector growth**

**IT as an enabler to better address  
societal challenges**

# The Local Growth of the IT Sector

## IT, Engine for Economic & Job Growth

Globally, IT spending and employment growth will outpace GDP and overall employment growth by a factor of three from 2009 through 2013.

**5.8mil new IT jobs** and **75,000 new companies** by the end of 2013.

**16,000+ new businesses in EU** between now and the end of 2013.

## Software, the Power Behind the Engine

In 2009, global software spending and employment rose while IT spending and employment dipped.

While spending on packaged software in the 52 countries will be only 21% of total IT spending in 2009, **51% of IT employment will be software-related..**

In EU, spending on packaged software will be only 20% of total IT spending in 2009 and **58% of IT employment in EU will be software-related**

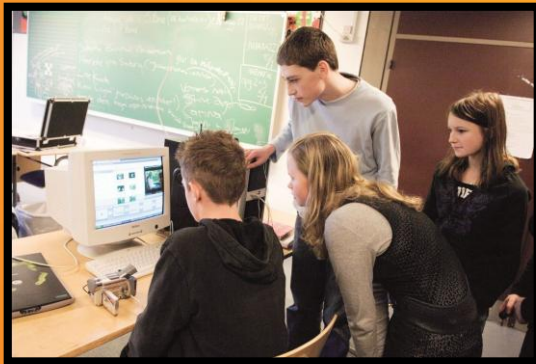
## The Impact of Microsoft 's Ecosystem of Local Partners

**700,000 business partners** will generate **revenues of \$537 billion in 2009**, almost a third of the \$1.4 trillion in total global IT spending.

For \$1 Microsoft makes, the Partner Ecosystem makes \$8.70.

For 1€ Microsoft makes in EU, the Partner Ecosystem in the region makes 9.02€.

The new jobs that will be created by the IT industry are promising, but they will require a highly skilled workforce.



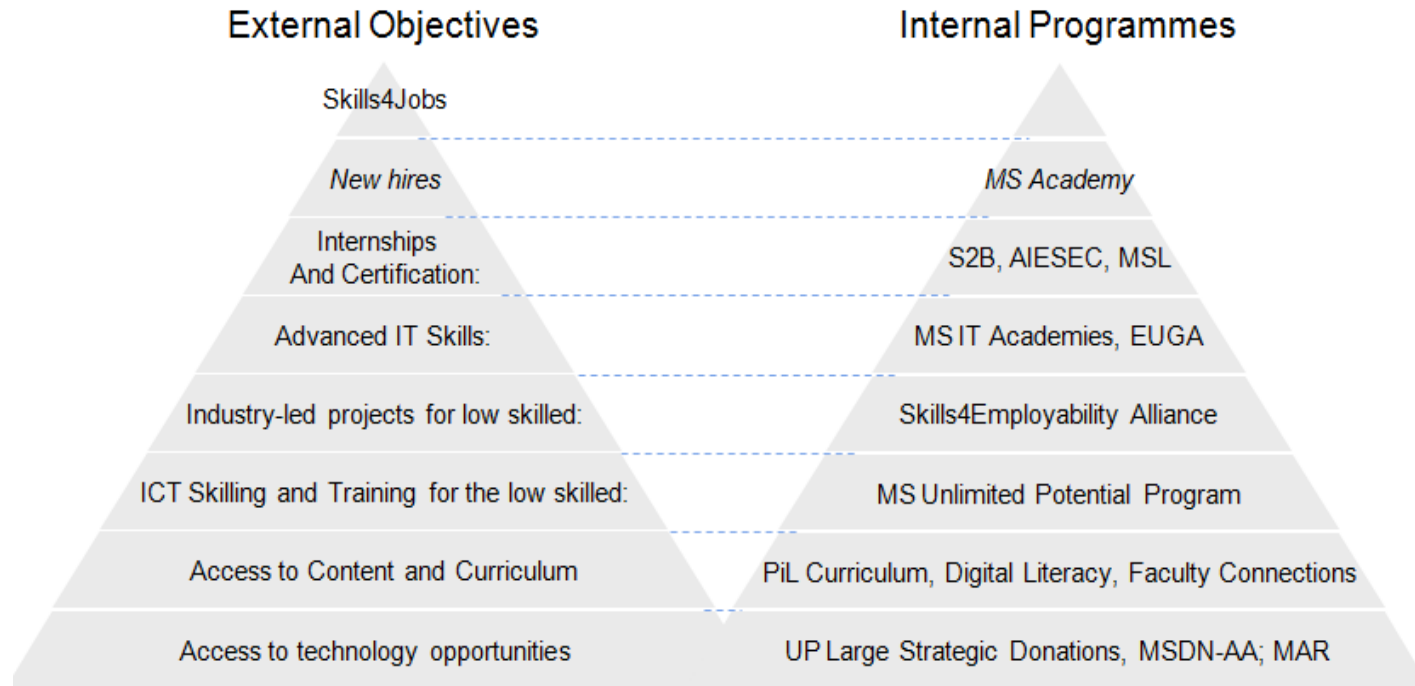
A skilled workforce will drive software innovation and **innovation is the solution to societal challenges.**

# E-Skills

## Preparing every individual for the jobs of the future

### 2010 Skills for Employability Roadmap

#### MS programmatic contribution to Employability objectives



**Skills for Employability: Reaching and training 20 Million people in Europe**

# E-Health

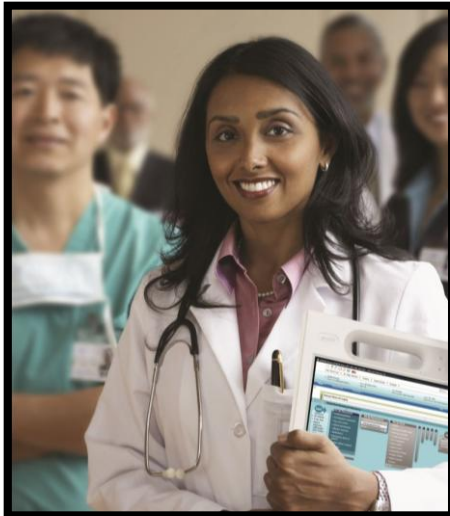
**The technology to realize the vision of tomorrow's healthcare is already available today**



Wider access to healthcare for many will:

- Lower costs for national systems
- Provide better quality of delivery
- Produce economic growth and new jobs

Patients are empowered in a connected healthcare ecosystem to manage their health and remain more independent at home, while at the same time reducing hospitalization costs.



**E-Health is a critical “change agent” helping our societies to make the shift from cure to prevention, from treatment of diseases to a focus on wellness and care.**

An ecosystem that empowers physicians and providers by giving them **the right data in the right format at the right time**, is enabling the best treatment and preventive care.

Reward systems for innovative doctors who make **the Internet the foundation of the patient-physician connection** can drive the transformation forward.



# The Environmental Challenge

## And the IT Solutions to Address it

### Awareness Raising

- **Climate Savers Computing Initiative** unites hardware and software manufacturers who commit to launch power efficient products
- **Eye on Earth Observatory** brings together scientific information with observations of millions of people. Waterwatch includes information on the water quality for 22,000+ bathing sites in Europe

### Consumer Options

- **Windows 7 Opt-ins**
  - Fewer background activities
  - Less power-hungry DVD playback
  - Powering off unused ports
  - A more accurate battery-life indicator
  - Automatic screen dimming
- **The Unified Communications** provides solutions for organisations to reduce carbon emission by reducing travel needs. **i.e.** Microsoft employees avoided flying 150mil km in the past fiscal year, **saving 17,000 metric tons of CO2**

### R&D Investment

- **Microsoft Research in Cambridge, UK**, are working to help manage the world's forests and understand their impact on our climate through predictive computational models
- **Data Center** in Dublin, Ireland, officially recognized as a best practice in using sustainable energy by the European Commission



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