

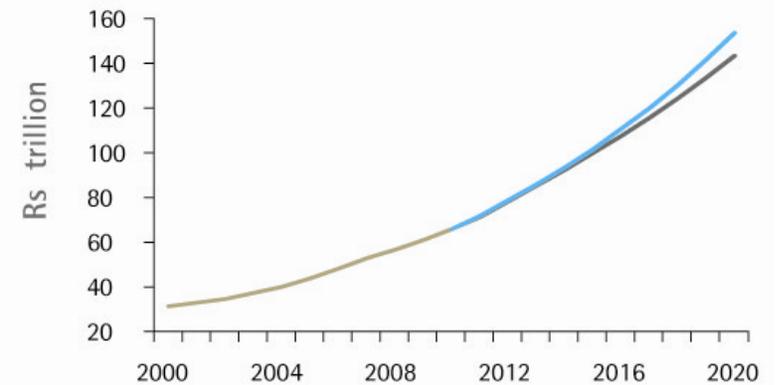
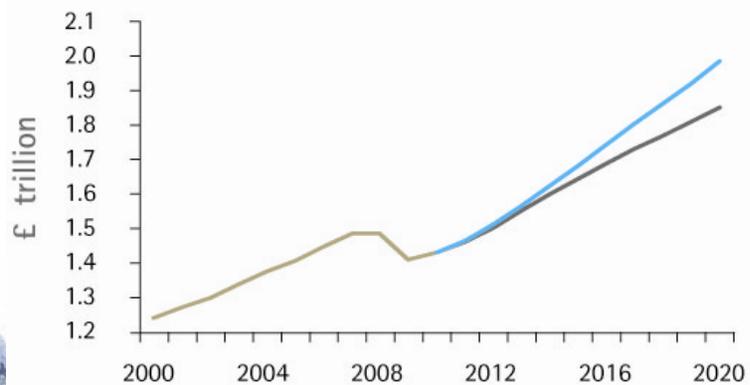
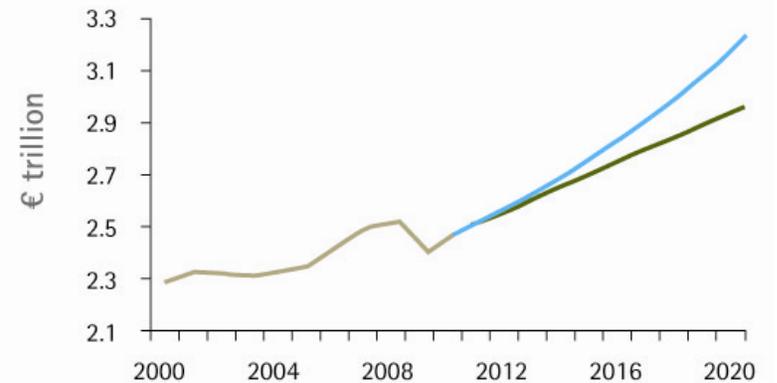
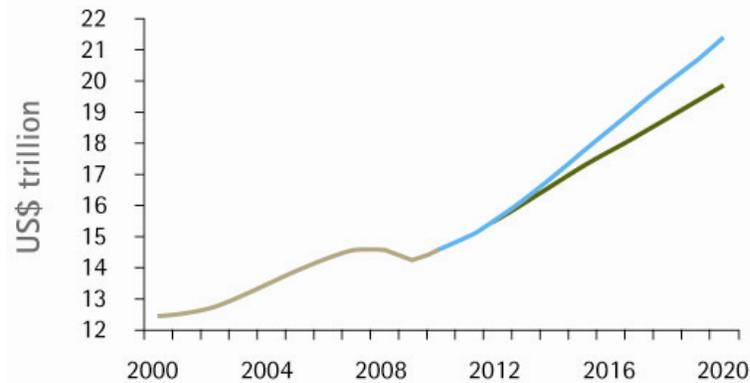
The Web Index: A new study to Determine the Web's global impact



A research program produced in collaboration with The World Wide Web Foundation

What could raise long-term growth?

— Current trajectory — Alternative trajectory



What could raise long-term growth?



Silver economy

Third-age learning

Connected health

Experiential goods and services

Lifelong finance



Resource economy

Intelligent energy

Green infrastructure

Food and agribusiness

Alternative energy sources



Multi-technology future

Core technologies

Ancillary technologies

Convergent technologies

Technology-enabled business models



Emerging-markets surge

Low-cost business models

Financial services

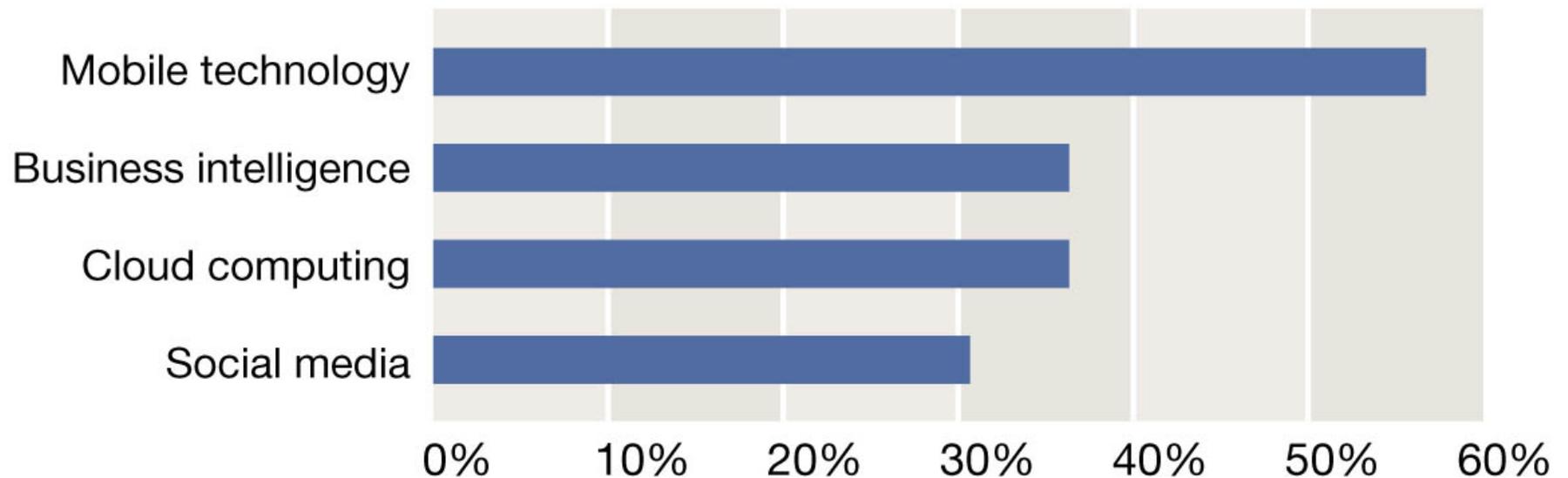
Infrastructure

Global middle class



Digital megatrends

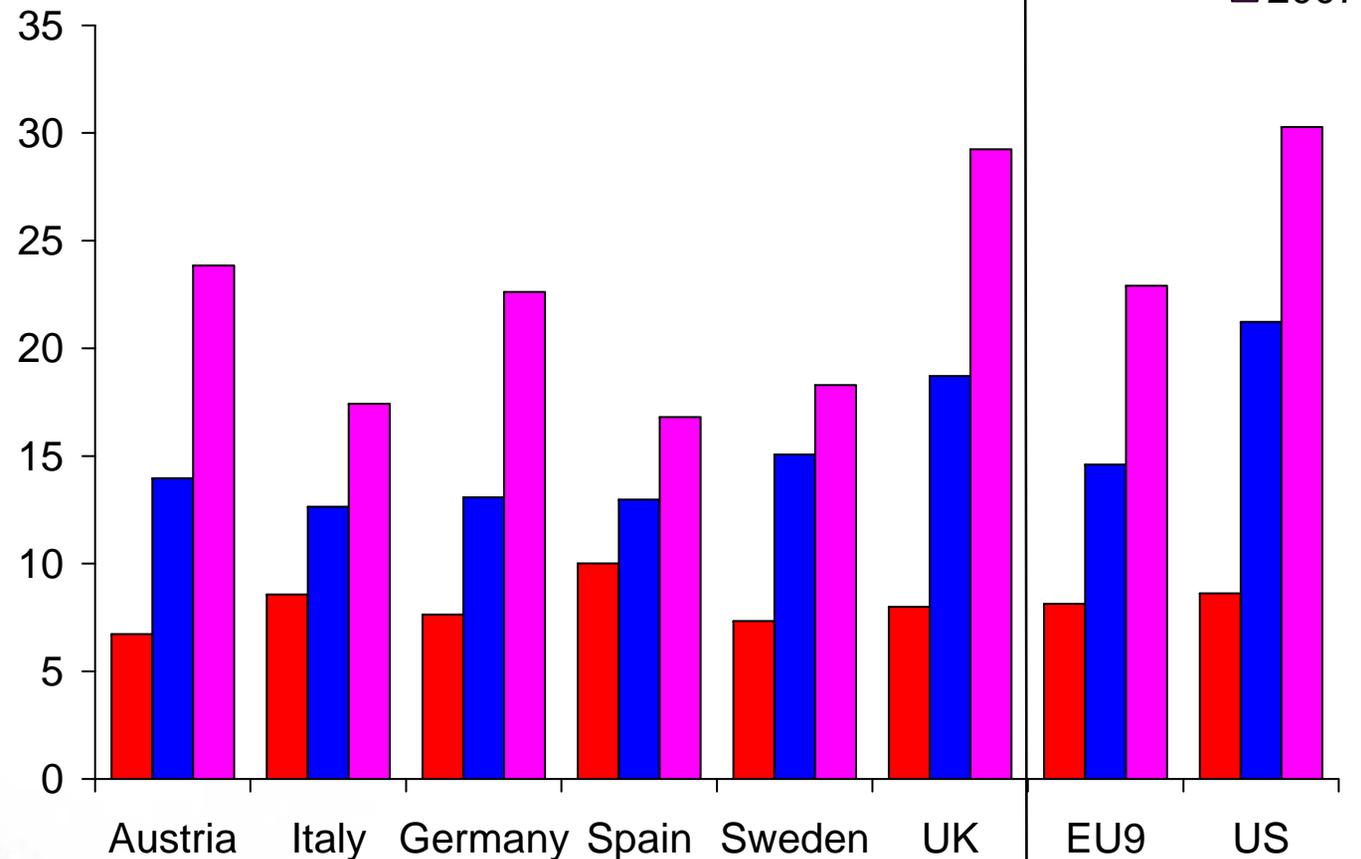
Which do you believe will have the greatest positive impact on your business over the next five years?



ICT driving differential economic performance

The ICT capital stock (% GDP)

% of GDP



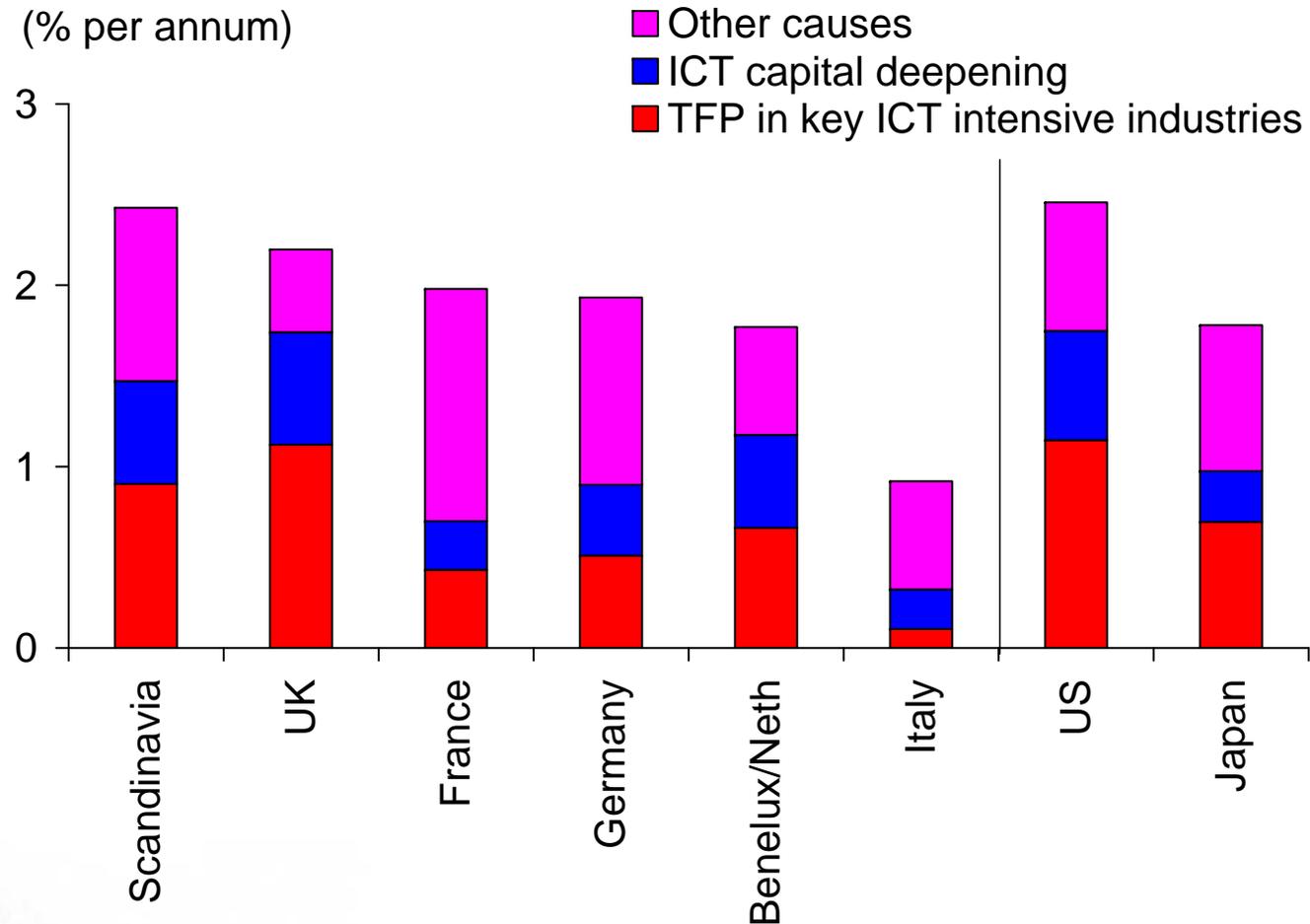
Source : Oxford Economics/EU KLEMS



Europe generally lagging US

ICT impact on labour productivity growth

(% per annum)



Source : Oxford Economics/EU KLEMS

Figures represent % of world GDP.



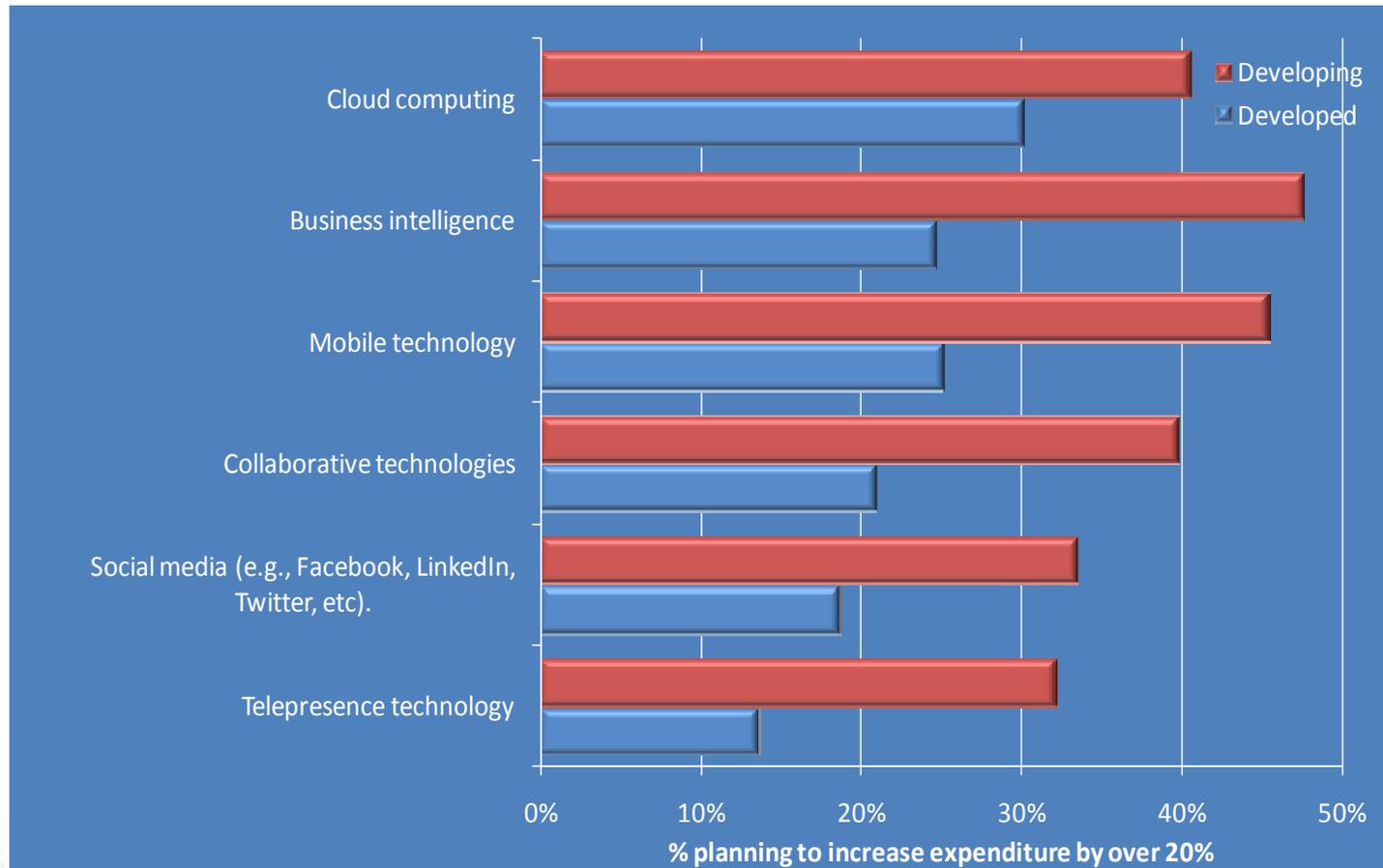
What would ICT catch-up deliver?

- Undertook regression analysis on the impact on TFP growth of investment in ICT.
- Looked at 26 industries across 13 countries from 1991
- Find that a rise in ICT capital of 10% of GDP raises TFP by 1.5%
- So, increasing Europe's ICT capital to US levels could boost productivity by 1.5% of GDP.
- In addition, there would be benefits from capital deepening.



Developing countries looking to leapfrog

Twice as many firms in developing economies than advanced markets plan to increase spending in the latest digital technologies by over 20%.



The Web Index

A large-scale research program

We have embarked upon a study in partnership with Tim Berners-Lee's World Wide Web Foundation to study the global impact of the World Wide Web.

- The Web Index will be a multi-dimensional measure of the Web and its impact across 130 countries.
- It will incorporate political, economic, social, and developmental indicators, as well as indicators of Web connectivity and infrastructure.
- The aim is to develop a tool for analysing how the Web is affecting economic performance and society across both time and countries.



Program components

The Web Index will look at a number of aspects of the Web, including:

- **The state and evolution of the web.** This includes indicators that provide insight into general access to the Web, the development of Web infrastructure and the extent of Web usage.
- **Social value.** We will explore the extent to which the Web acts as a force for social equality. It is also important to capture the extent to which the Web influences social norms.
- **Economic value.** The Web has evolved into an important conduit for services, exemplified by the rapid growth of online commerce. Capturing the Web's role in supporting this activity will be crucial to developing a relevant index score.
- **Political value.** The Web can play a vital role in promoting pluralist and democratic values. Increasingly, the Web also is used in voting processes, particularly in advanced democracies, helping to enhance participation rates.



A rich set of data sources

We will be using a broad range of data sources to create the Web Index and accompanying white paper. These include:

- ITU
- World Bank
- CIA
- OECD
- Eurostat
- World Economic Forum
- E-marketer
- Google
- Internet World Statistics
- Boston Consulting Group
- McKinsey Consulting
- National Statistical Offices



Will you help us measure the Web's impact?

We are looking for objective international experts to represent their countries and contribute to this study by participating in an online survey to help us understand how the Web has affected your home country.

- The survey will be designed as a series of brief ranking questions to help us understand the political, economic and social effects of the World Wide Web.
- Participants will receive a copy of the final report and data set, and their names will be included in the study as contributors, if they wish.



Thank you

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