

ICT~Office

ICT~Office is the trade association for the IT, Telecom, Internet and Office sectors in the Netherlands. The ICT~Office activities consist of market promotion, representation and services for its 525 plus members. The ICT sector provides work to 250,000 people; its market size amounts to 30 billion euros.

ICT~Office assumes an active role in innovative projects with the goal of creating opportunities for the ICT sector. The *InnovatieSalons*, a cluster approach for accelerating innovative projects, are a successful example of this. The costs and proceeds of a project are calculated in cooperation with the ICT companies involved so as to clearly identify the contribution made by the application of ICT to the economy as well as society.

An important goal of ICT~Office is to get ICT high on the political agenda and keep it there. In this regard, ICT~Office uses its administrative and political network to focus attention on the sector's specific bottlenecks. This includes the provision of information, as well as the contribution of alternative solutions and the initiation of joint action together with like-minded organizations.

An important part of our representation is to gain access to the government market for ICT companies. A strategic program for cooperation between government and the ICT sector was initiated in 2007. Its purpose is to ensure that a higher share of government ICT contracts are awarded to the SME sector and to increase the use of new, innovative software, among others.

ICT~Office organizes a large number of (network) meetings each year for its members that focus on actual and business-related topics and on knowledge transfer. In addition, ICT~Office members have access to a coherent package of legal, HRM and environment-related services.

Despite the uncertain economic situation, the key long-term issue is the demand for well-trained ICT professionals. ICT~Office has therefore initiated the 'www.allesis.it' action program at the beginning of 2009. The goal of this program is to increase the enrollment of students in ICT education programs, increase the influx of ICT professionals into the ICT sector and improve the image of the sector.

ICT~Milieu (ICT environment) is an ICT~Office subsidiary that provides a system for the separate collection and processing of used ICT equipment. Within ICT~Office, the ICT Collection System is part of the Corporate Social Responsibility program. The ICT Collection System is financed by the manufacturers themselves contrary to other collection systems which are financed through waste disposal fees paid by the consumer. The ICT equipment is mainly disposed via the municipal waste processing system. Retail (trade-in of old equipment when buying new) and business-to-business are channels through which old ICT equipment enters the waste processing system. The amount of ICT equipment collected in 2008 increased by 11.4 percent compared to 2007 and added up to 22.7 million kilograms. The cost, in 2008, of waste processing was 29 eurocents per kilogram. More than 300 companies have joined ICT~Milieu.

Werkgeversvereniging~ICT is another ICT~Office subsidiary which manages the ICK-CAO, the collective labor agreement for the Information, Communication and Office Technology sectors. It also manages the pension fund for these business sectors. *Werkgeversvereniging~ICT* has 155 members.

Figures & Trends

During 2008, the market size for ICT spending increased to 30.9 billion euros. As such the share of the ICT sector of the Dutch economy is 5.2 percent. The market size is expected to amount to 31.2 billion euros in 2009. 2008 was a positive year for the ICT sector in the Netherlands with an above-average growth rate of 2.7 percent. 2009 is less certain. The ICT sector appears to be performing better than the economy in general, but there are significant variances between sectors and companies. There is considerable uncertainty about economic developments in 2009 and 2010. After a reasonably good economic year with an overall growth for the Dutch economy of 2.0 percent, the projection for 2009 is for a negative growth of 3.5 percent.

The economic crisis makes it difficult for companies to access money. This, combined with a low level of confidence, means that investments are postponed. Considerably lower investments lead to a decrease in innovative power. ICT is able to contribute significantly to overcoming the economic crises faster and better. This requires investment in superfast networks so that innovative ICT can reach citizens, businesses and the public sector. This means investment in glass fiber, faster cabling and mobile broadband.

The ICT Sector in Motion

The economic crises will have an impact on the ICT sector during 2009. A cautious forecast calls for a 1.1 percent sector-wide growth of the ICT market in 2009. By continuing to invest in ICT, a sharp decrease, such as that seen at the turn of the century, will be prevented.

Table 1: Growth in ICT spending 2007-2009

	2007	2008	2009
Total for the ICT sector	3.8%	2.7%	2.9%
IT Hardware & Office Technology	6.4%	4.1%	5.2%
<i>of which Office Technology</i>	0.7%	0.4%	0.5%
IT Software & Services	8.7%	7.8%	5.0%
<i>of which software</i>	9.5%	8.1%	5.9%
<i>of which services</i>	7.4%	7.4%	3.6%
Telecom & Internet	0.7%	-0.2%	1.0%

Source: ICT~Office/ Heliview 2009

ICT and Innovation

In 2005, the Dutch Innovation Platform designated ICT as the Axis of Innovation. This makes ICT the axis of progress that runs through the various key areas in the business and public sectors in the Netherlands. It is particularly due to the fact that ICT is not so much seen as a key sector, but rather as an *Enabler* for innovation for all the other key sectors, that the ICT sector plays a special role in the Dutch economy.

ICT applications offer endless possibilities to the consumer, business and public organizations. Extensive access to superfast digital highways is needed to optimally deploy ICT as the Axis of Innovation. Whether it concerns new forms of e-commerce, smarter mobile ways of working, lowering health-care costs or enabling students to study more effectively at home and at school: super-fast glass fiber, fast cable and mobile broadband offer access to the future digital world.

ICT is the *Enabler* that can offer innovative solutions to, for example, tackle the mobility issue. ICT creates new opportunities for improving the flow of traffic by the smart processing of traffic information and by providing references to the facilities available for working locally. Mobile working is with us to stay. This creates new ways of combining work and personal life. ICT can thus be deployed in various domains to gain benefits and save costs.

Energy & Environment

Energy use is drawing considerable worldwide attention. The ICT sector considers this an important issue as well and is part of ICT~Office's Corporate Social Responsibility (CSR) program.

ICT's role as a means of saving energy is only getting limited attention from opinion makers. Academics, however, have already come to a conclusion: ICT creates a 'window of opportunity' because ICT, with just 2 percent of the worldwide CO₂ emissions, can be leveraged to address the remaining 98 percent (WWF, 2008). The same World Wildlife Fund scientific report estimates that the deployment of smart ICT applications can lead to a reduction of 8,700 megatons in CO₂ emissions by 2030.

In 2008, ICT~Office signed a multi-year agreement on energy efficiency in the ICT sector called *MeerJarenAfspraak* (MJA) with the Dutch State Secretary for Economic Affairs. ICT companies can join the MJA and, when they do so, they commit themselves to improve their energy efficiency by 2

percent a year, on average. The result will be an energy improvement of 30% by the year 2020 as compared to 2005.

Education and the Labor Market

The number of vacancies not filled continues to play a decisive role in the economy, especially for ICT. The economic situation is causing a temporary relaxation of the ICT labor market, but this situation is not expected to last very long. The reduced enrollment in ICT education will continue for the time being. Enrollment in ICT training programs is decreasing, often sharply. This declining trend has not been halted as yet for professional education at the higher vocational education level (-9 percent) and the university level (-14 percent).

For 2009, a lower growth of available ICT jobs is forecast (see table 2). This also has consequences for the degree of vacancies, which is expected to go down by a half in 2009 to about 4 percent of the number of jobs in the ICT sector and 3 percent of the ICT jobs in the remainder of the economy. This percentage of difficult to fill vacancies for ICT professionals is taken as the basis for the shortage. The unfilled demand for ICT professionals is calculated from the degree of vacancies as compared to the total number of ICT professionals.

Table 2: Shortage of ICT professionals in The Netherlands 2009 -2013

	2009	2011	2013
Shortage of ICT-professionals	950	2,650	5,950
Total ICT professionals	139,300	144,850	153,050

Not only must there be sufficient numbers of ICT professionals, it is also important that the fit between the educational system and the labor market be further improved. Furthermore, non-ICT training programs need to pay more attention to ICT, because the successful application of ICT is only possible through joint collaboration with users working in other domains.

Host of WITSA's World Congress on Information Technology (WCIT) 2010 in Amsterdam

ICT~Office is proud and excited that it will host WCIT 2010 together with the Dutch Ministry of Economic Affairs and the City of Amsterdam. WITSA's World Congress on Information Technology (WCIT) is a global bi-annual event and is considered one of the most influential global conference on ICT.

WCIT 2010 will be held from the 25th till the 27th of May 2010 in Amsterdam. WCIT 2010 will bring together around 2,500 politicians, captains of industry, high-level officials, academics and opinion leaders from all over the world.

The main focus of WCIT 2010 is the role of IT as enabler for innovation in the main sectors of the economy and society. This is elaborated in so called tracks, such as energy, water, health and mobility. Each track is build upon to cooperation between ICT-companies, sector companies (IT-users), government and academia. Partners participate as well as financial as in program development. The track leader will be from an IT-user organization or independent institution. Each track will be represented with a showcase pavilion in the WCIT 2010 Village, which also accommodates country pavilions. For more information: www.wcit2010.org