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赛迪顾问股份有限公司



# ICT For a Sustainable Chinese Economy

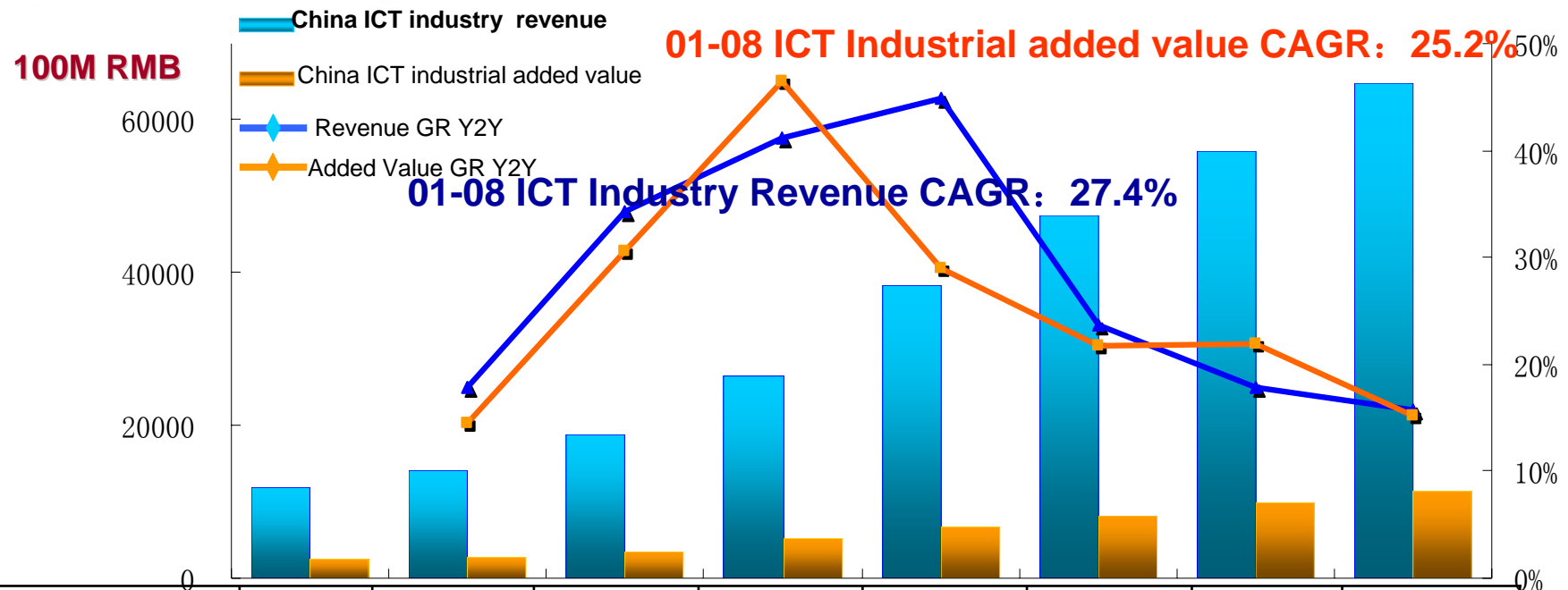
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**CCID Consulting**

**Jan, 2009**

# Slowing growth rate of China ICT industry' s revenue & added value



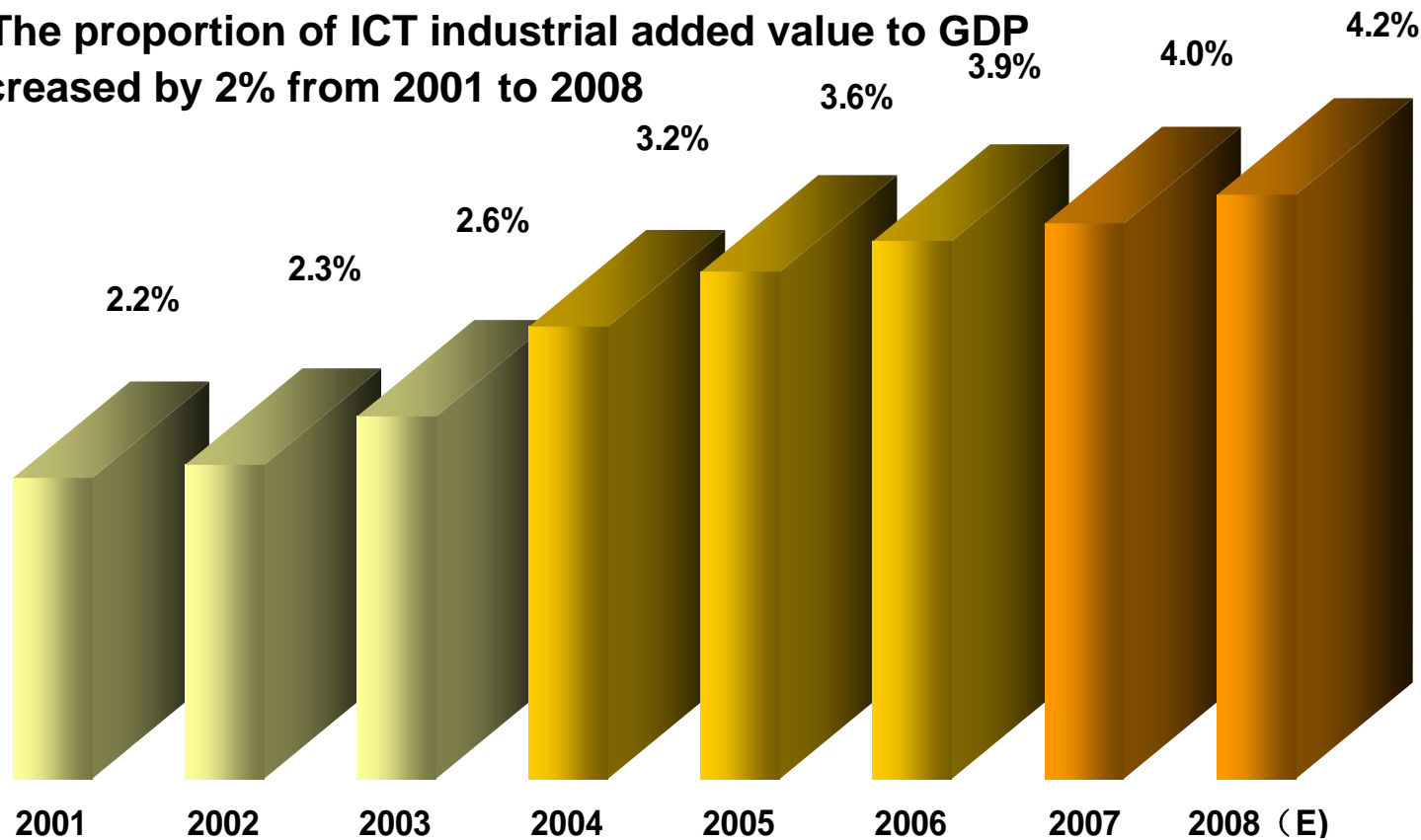
Year	2001	2002	2003	2004	2005	2006	2007	2008 (E)
China ICT industry revenue	11,885	14,000	18,800	26,532	38,417	47,500	56,000	64,814
Revenue GR Y2Y	--	17.8%	34.3%	41.1%	44.8%	23.6%	17.9%	15.7%
China ICT industrial added value	2,372	2,715	3,544	5,193	6,701	8,155	9,948	11,459
Added value GR Y2Y	--	14.4%	30.5%	46.6%	29.0%	21.7%	22.0%	15.2%

Data Source: Ministry of Industry and Information Technology (MIIT)

# The contribution of ICT industry to GDP increases steadily

◆ The influence of China ICT industry on the national economy grows bigger and bigger

◆ The proportion of ICT industrial added value to GDP increased by 2% from 2001 to 2008



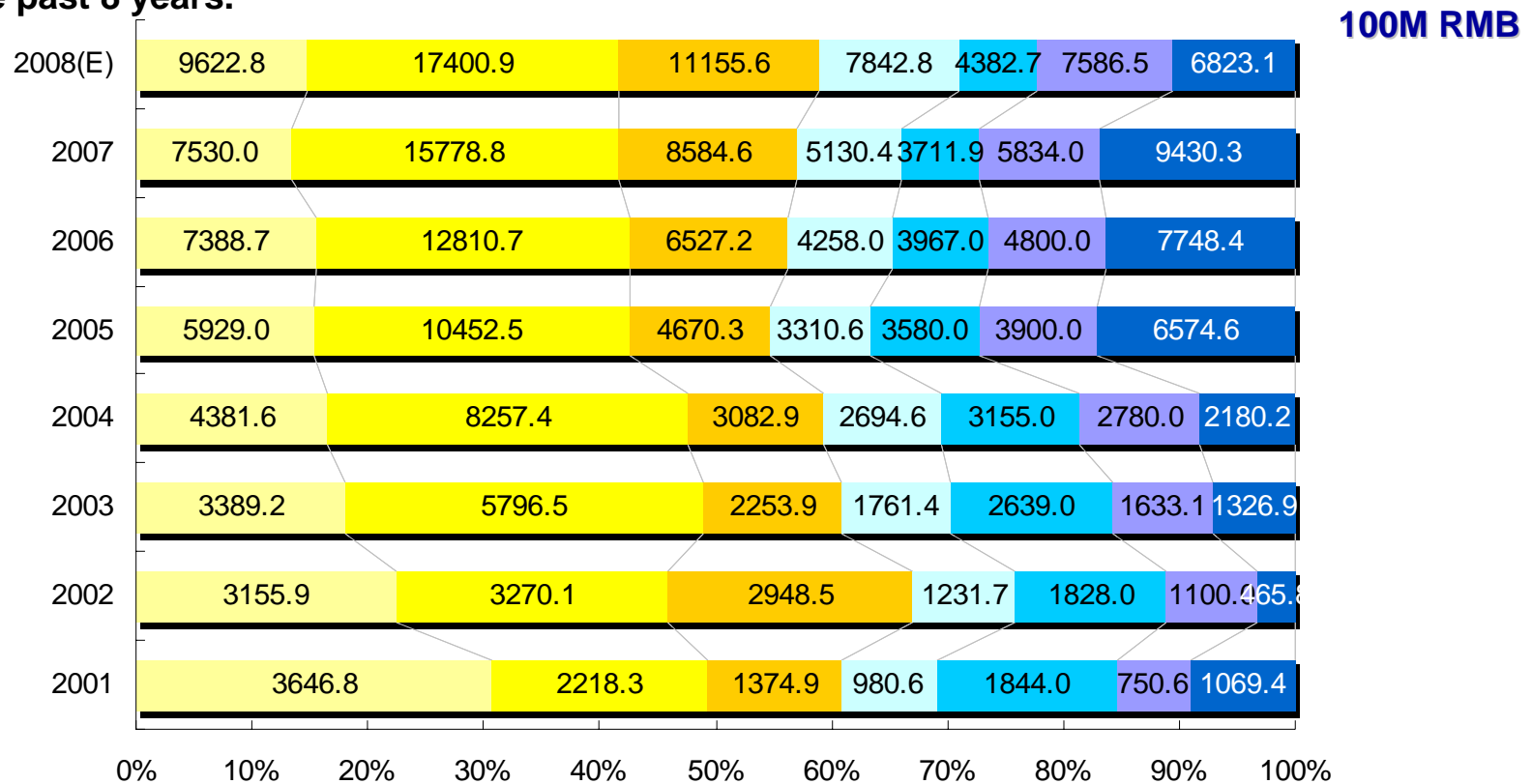
Data Source: NBS & MIIT

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# Manufacturing dominates China ICT industry ;Software industry proportion goes up quickly

◆ Revenue of computer sys + electronic elements & components +communication equip+ home audio & video products account 80% of the overall ICT industry revenue.

◆ China software industry grows rapidly, its proportion in the whole ICT industry increased from 6.3% to 11.7% in the past 8 years.



**CAGR**

**14.9%**

**34.2%**

**34.9%**

**34.6%**

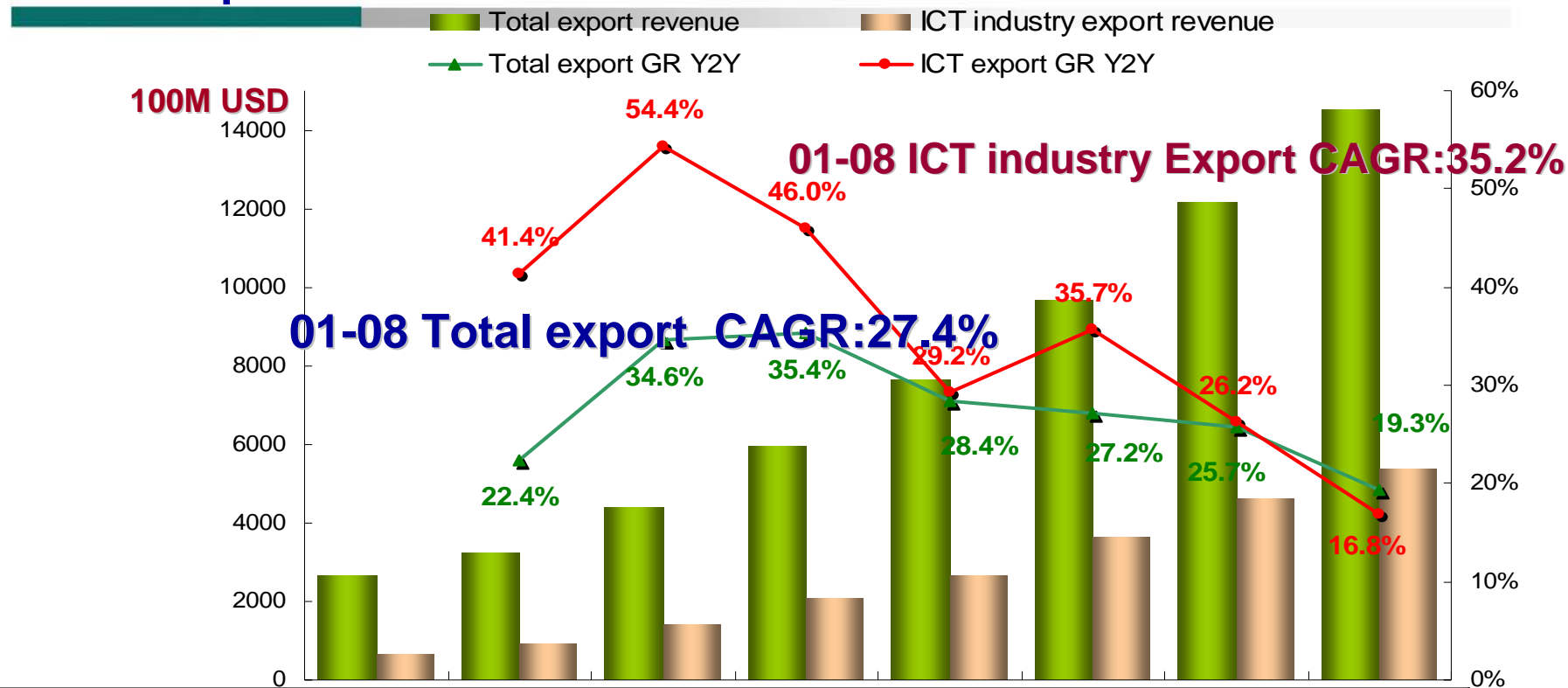
**13.2%**

**39.2%**

**30.3%**

Data Source: MIIT, CCID Consulting

# China ICT industry export GR higher than that of the national overall export



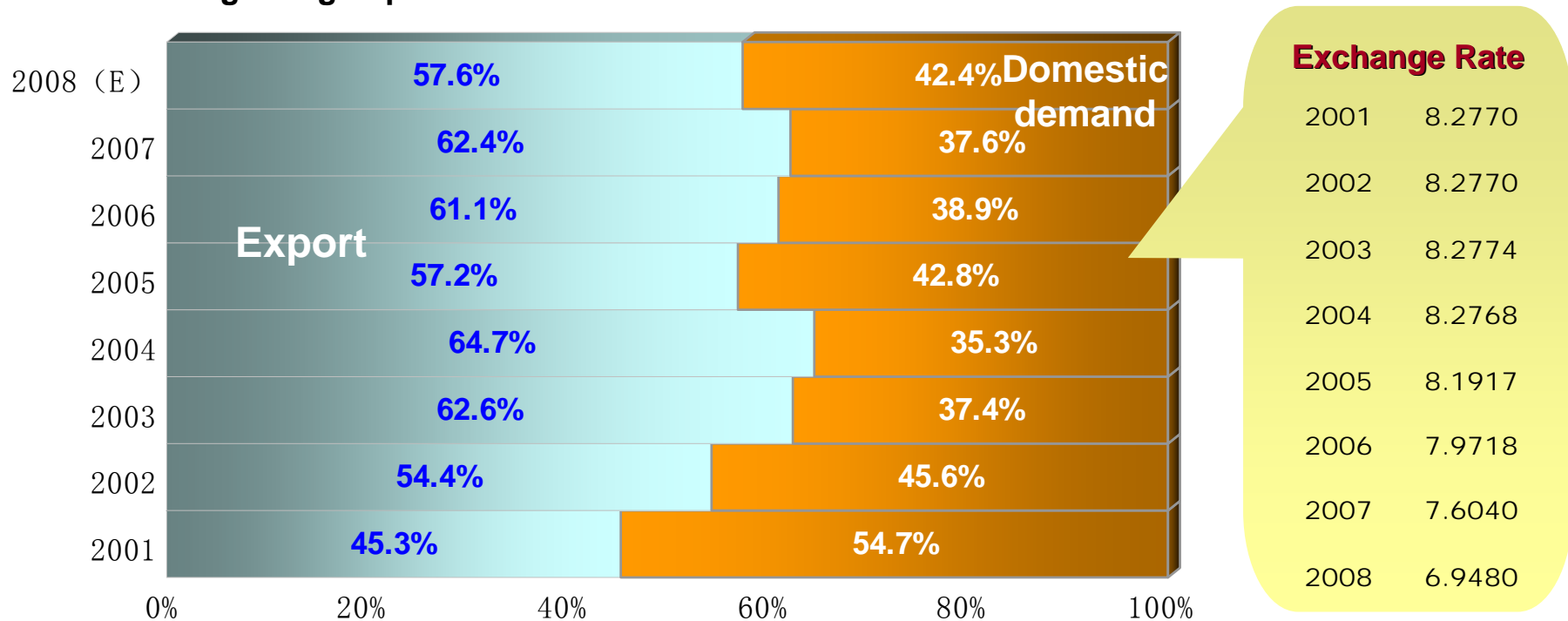
Year	2001	2002	2003	2004	2005	2006	2007	2008 (E)
<b>National Total export revenue</b>	2661.0	3256.0	4382.3	5933.2	7619.5	9689.4	12180.0	14530.0
<b>ICT Industry export revenue</b>	650.9	920.4	1420.9	2075.0	2681.7	3639.8	4595.2	5369.0
<b>ICT /Total export</b>	<b>24.5%</b>	<b>28.3%</b>	<b>32.4%</b>	<b>35.0%</b>	<b>35.2%</b>	<b>37.6%</b>	<b>37.7%</b>	<b>37.0%</b>

Data Source: General Administration of Customs (GAC) & MIIT

# The ratio of export dependency of China ICT industry remains at a high level

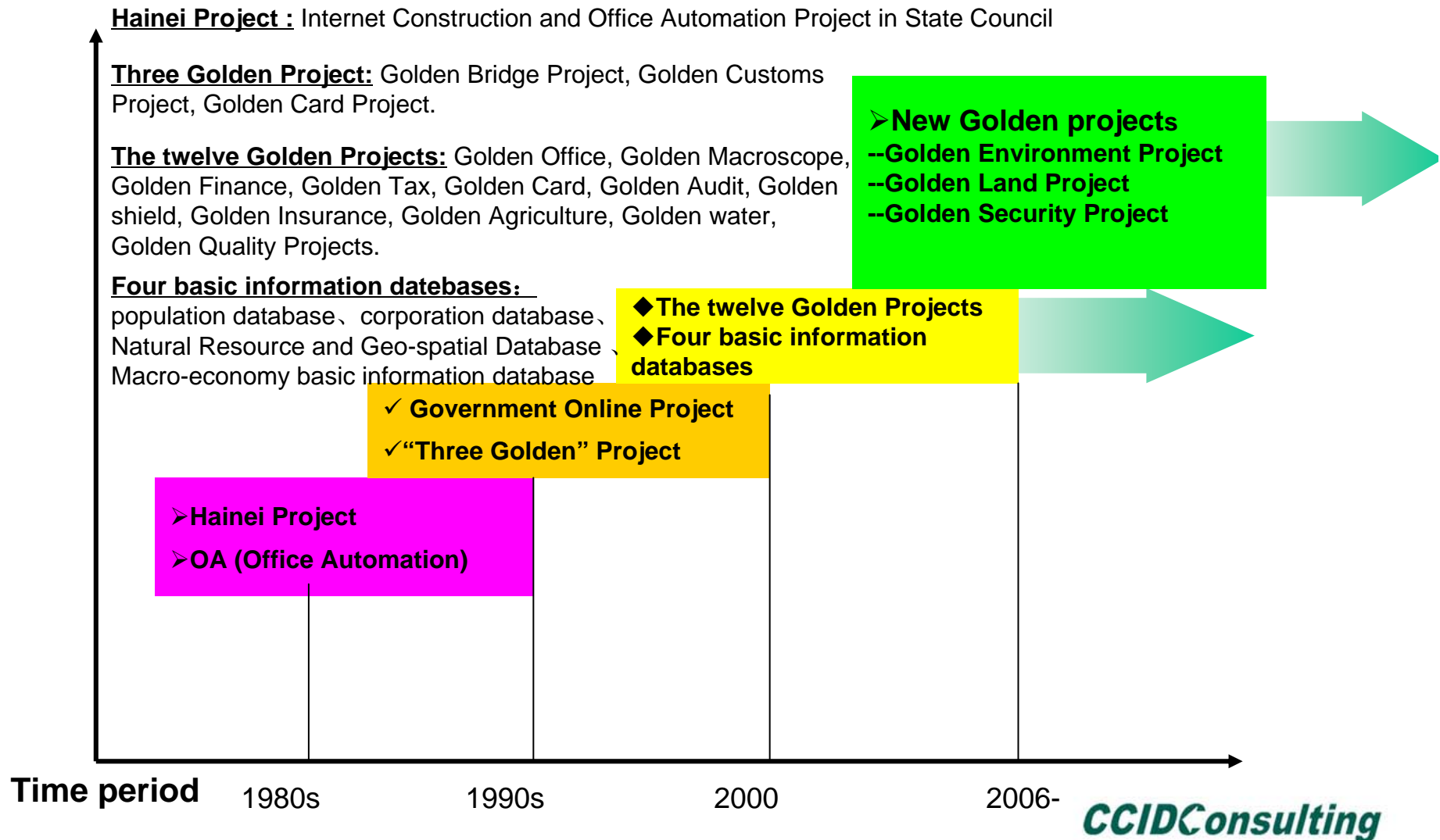
Exporting is still very important for china ICT industry.2001-2008,the average ratio of export dependency is 59.4%.

2008,under the pressure of demand decline from international market, the ratio of domestic needs begin to go up.



Data Source: GAC, NBS & MIIT

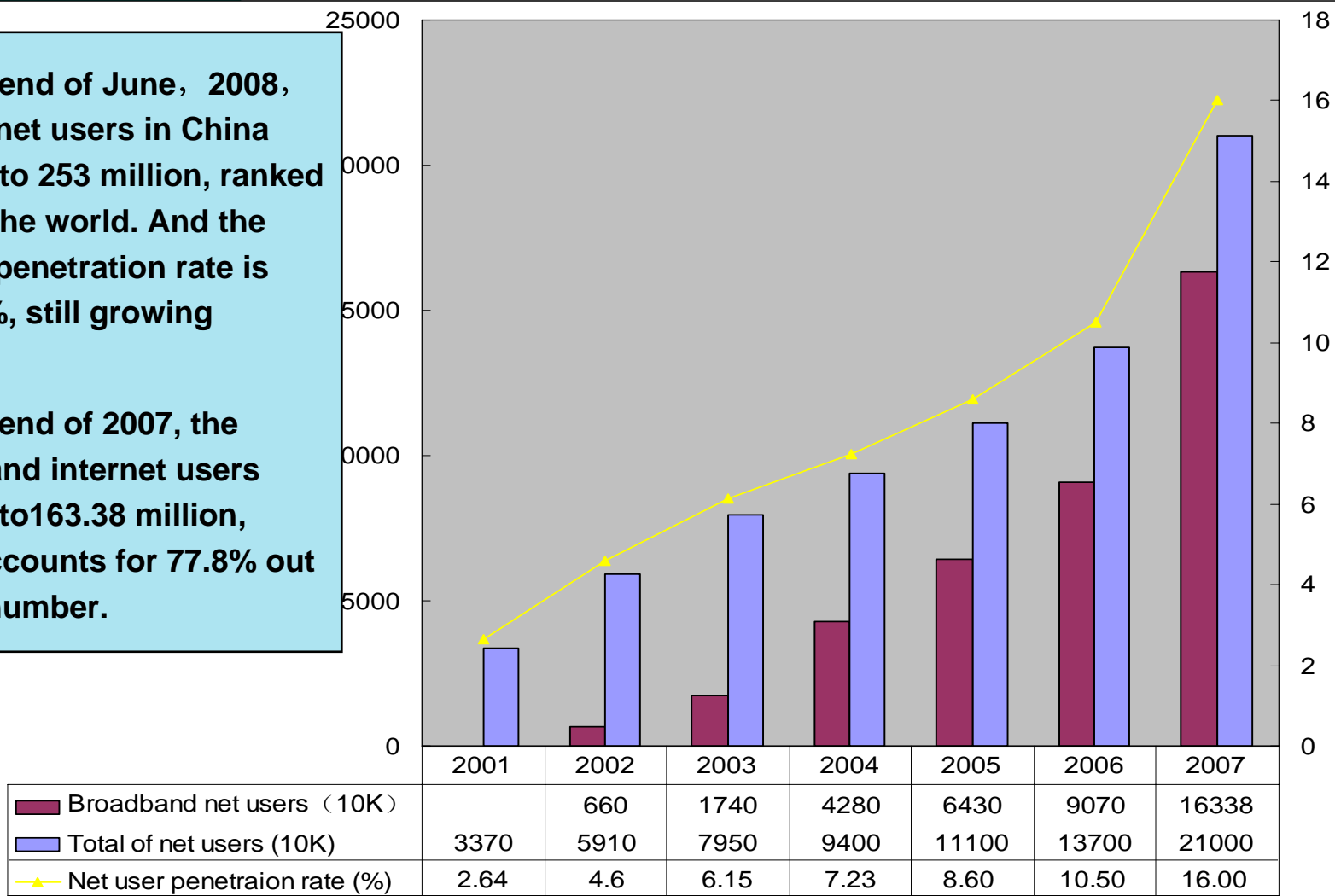
# China informatization history



# China internet penetration rate

●By the end of June, 2008, the internet users in China reached to 253 million, ranked NO.1 in the world. And the internet penetration rate is over 16%, still growing rapidly.

●By the end of 2007, the broad band internet users reached to 163.38 million, which accounts for 77.8% out of total number.

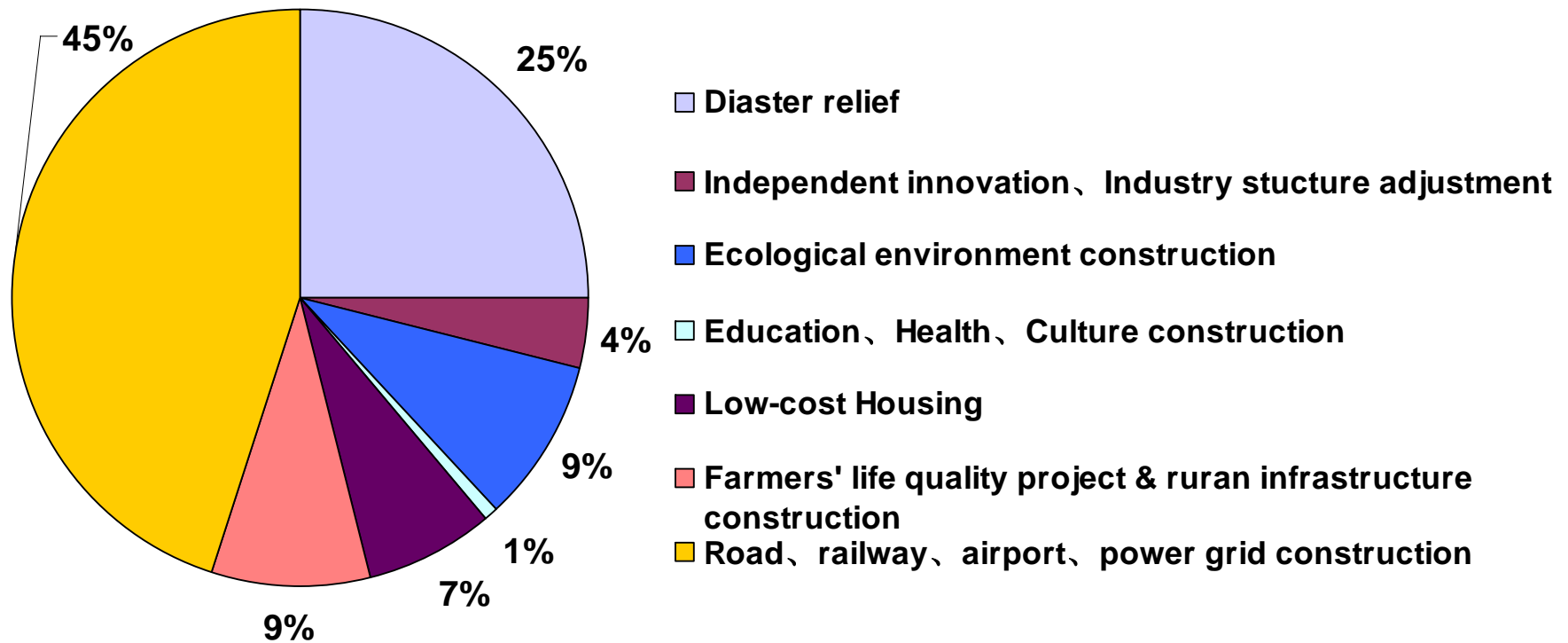


Data Source: CCID Consulting

# Rmb 4,000bn investment will promote related industries' informatization construction

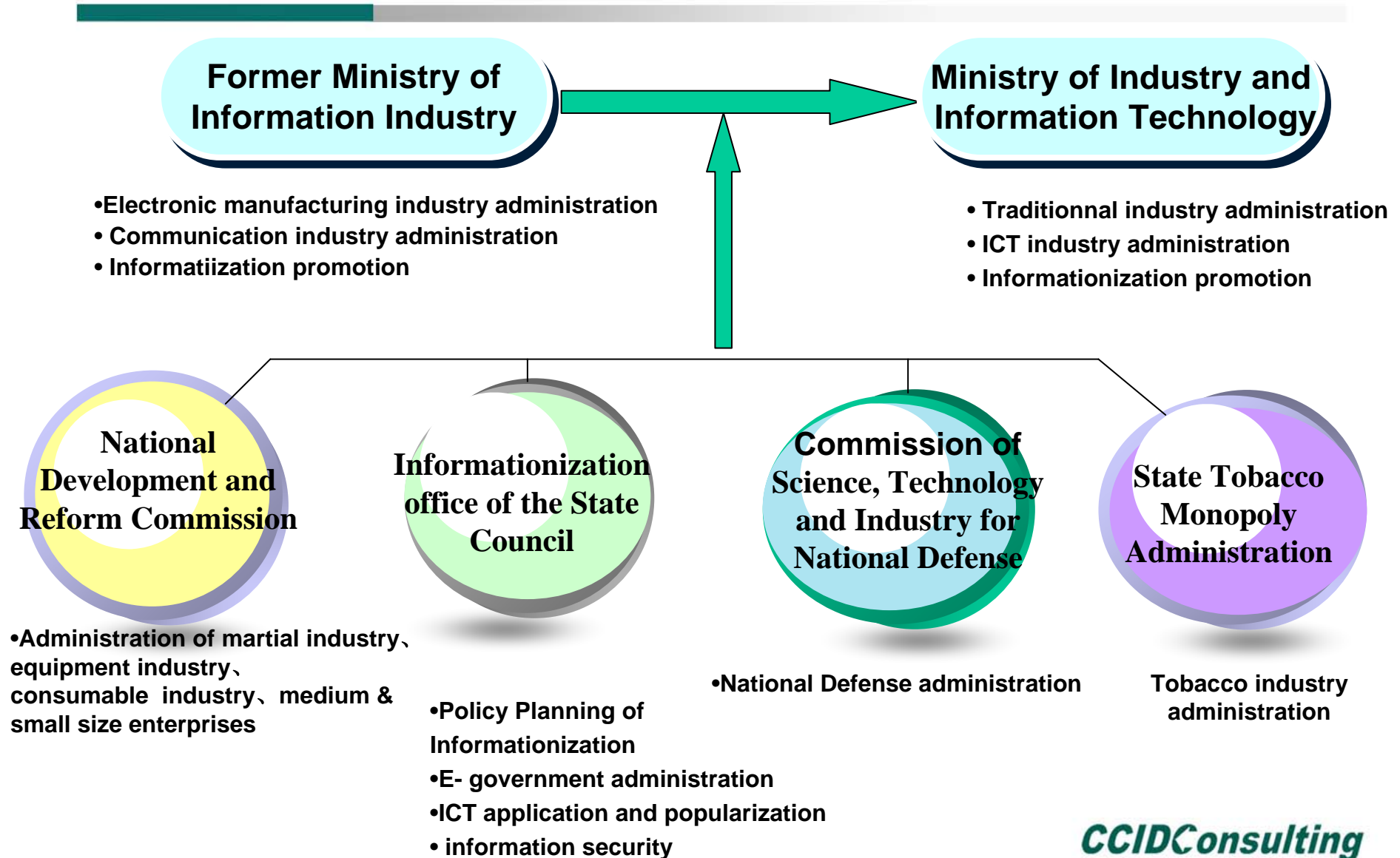
At the end of 2008, Chinese government invested rmb4,000bn to boost domestic needs, which will consequently promote related industries' informatization construction for sure.

## Rmb 4,000 bn Investment



Data Source: NRDC

# Evolution of Ministry of Industry and Information Technology



# Conclusions

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China ICT industry coordinates and accelerates China economy growth effectively.

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Informatization boosts the China industrialization practically .  
The convergence of them is becoming a major trend.

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Chinese government makes great efforts to promote ICT industry development and “convergence of industrialization & informatization”

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