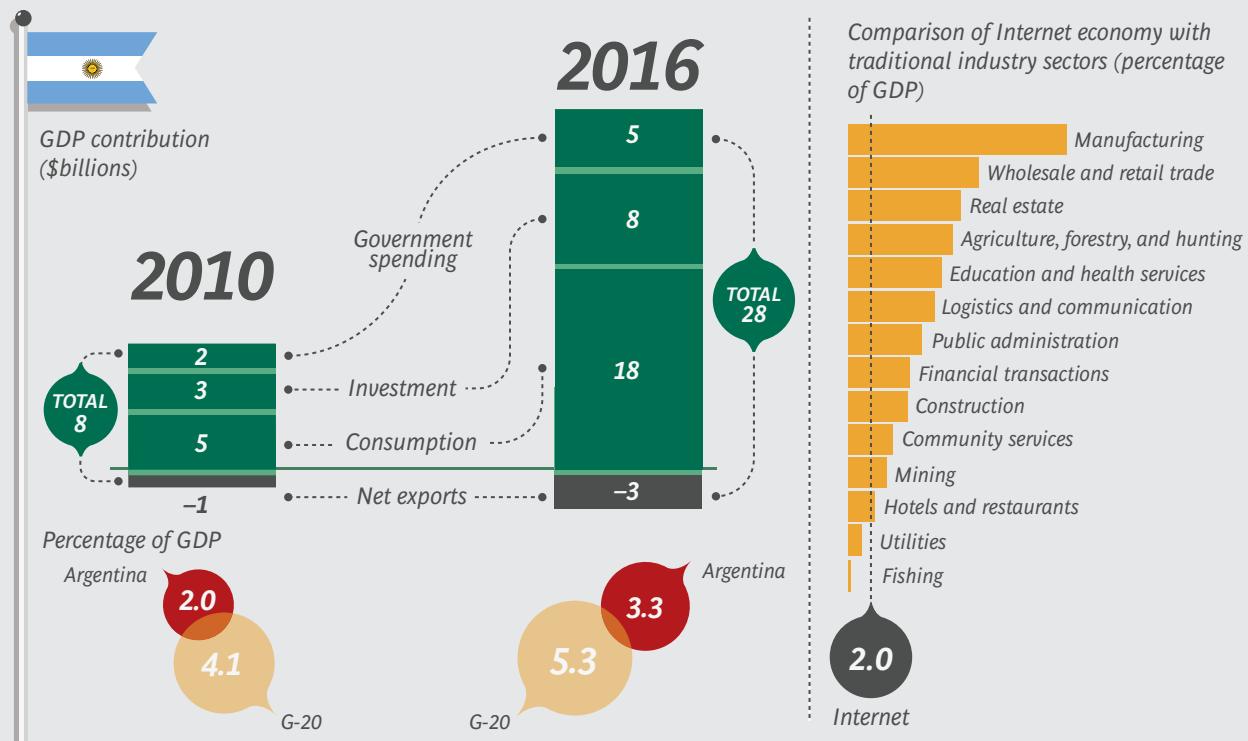


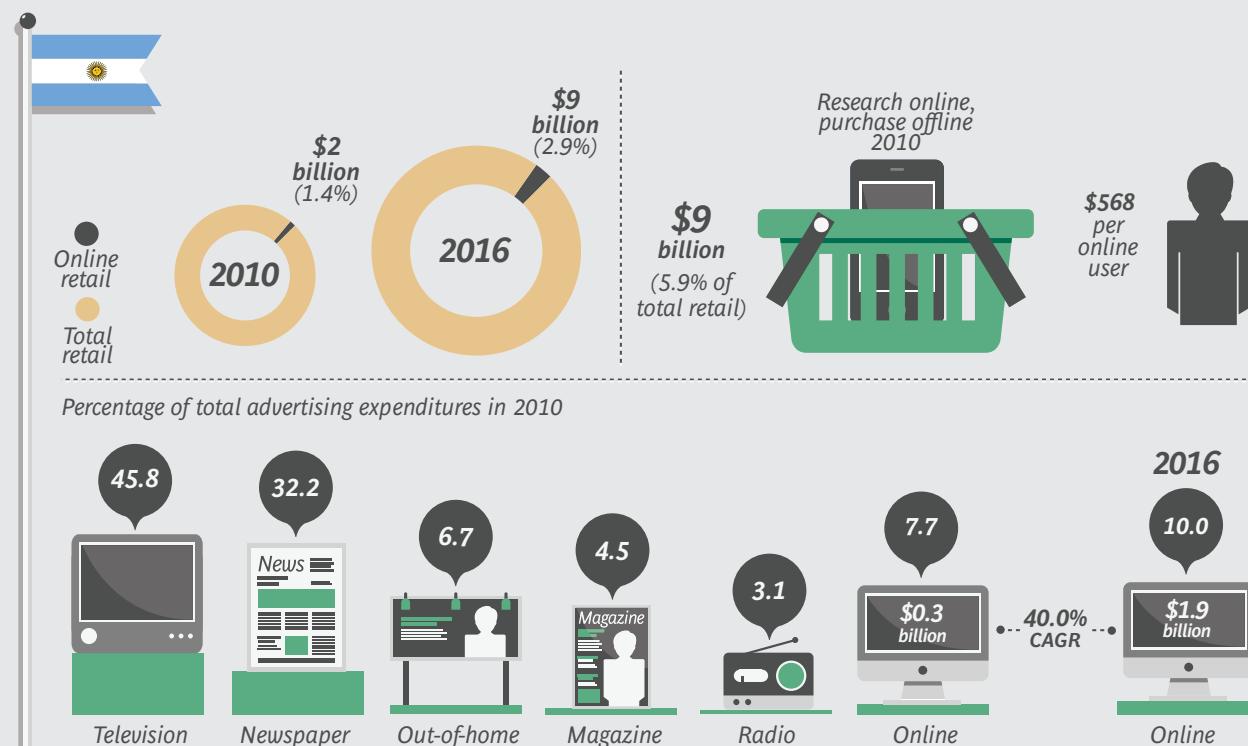
Argentina's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; INDEC; CACE; IEMR; company reports; World Bank; World Trade Organization; AméricaEconomía; BCG analysis.

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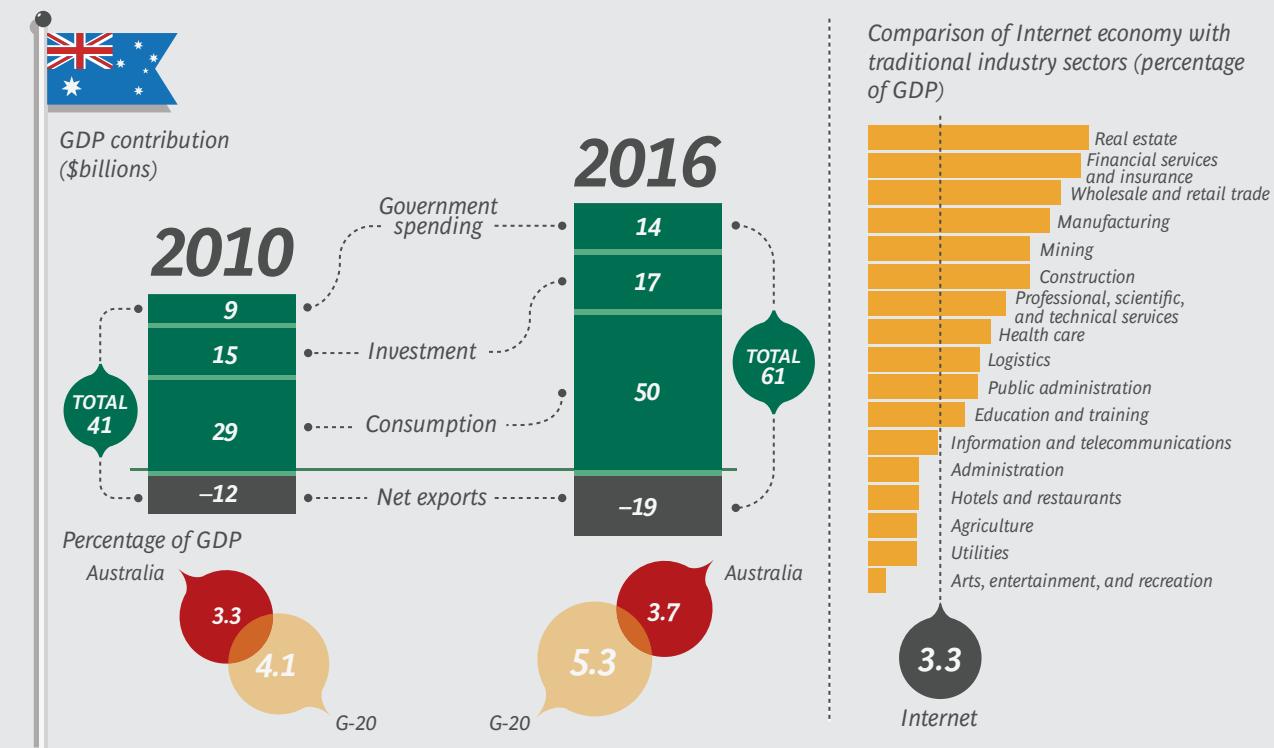
The Internet's Impact on Commerce in Argentina



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; INDEC; CACE; IEMR; company reports; World Bank; World Trade Organization; AméricaEconomía; BCG analysis.

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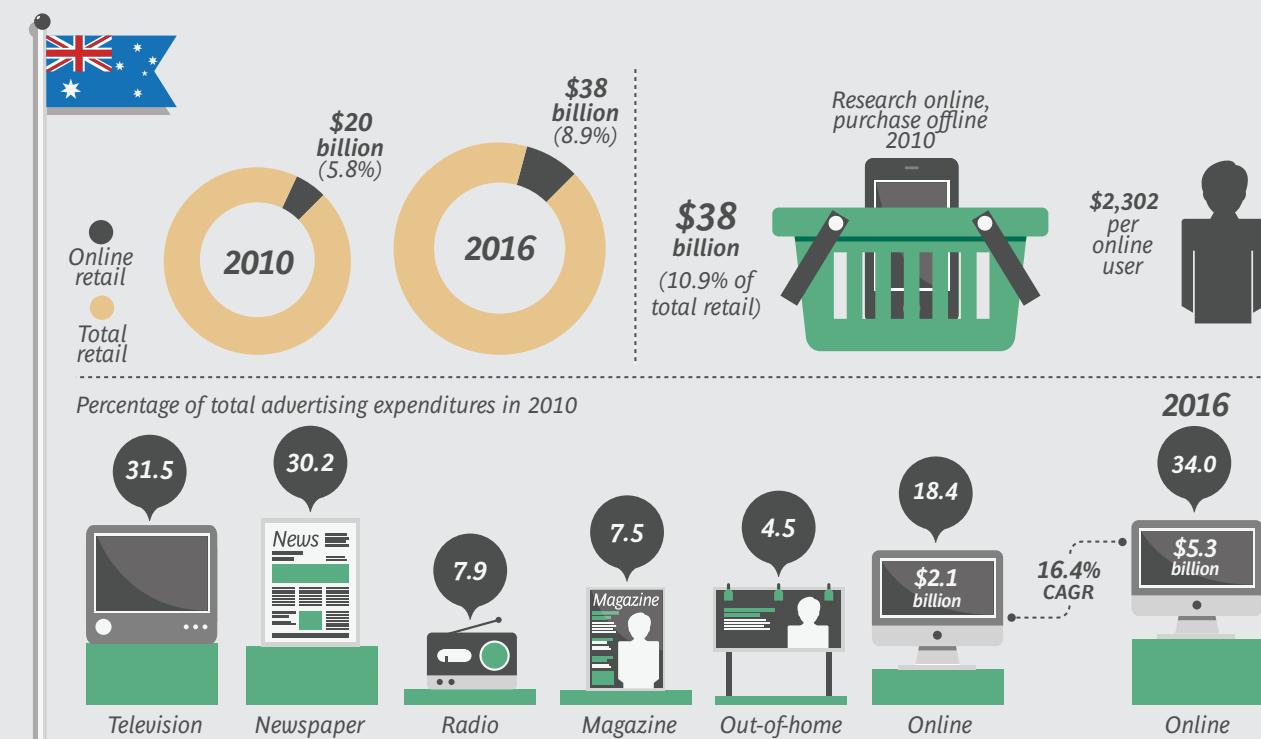
Australia's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Australian Bureau of Statistics; Forrester Research; IEMR; Australian Communications and Media Authority; company reports; National Broadband Network; BCG analysis.

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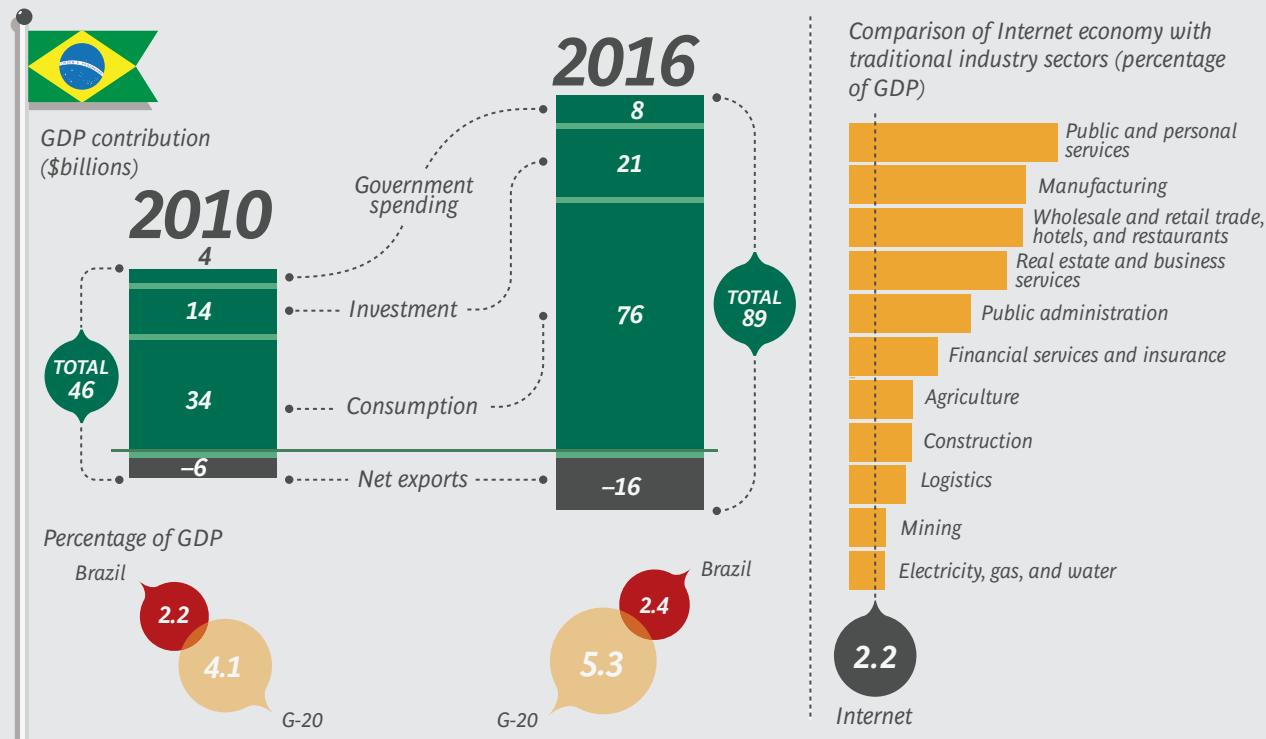
The Internet's Impact on Commerce in Australia



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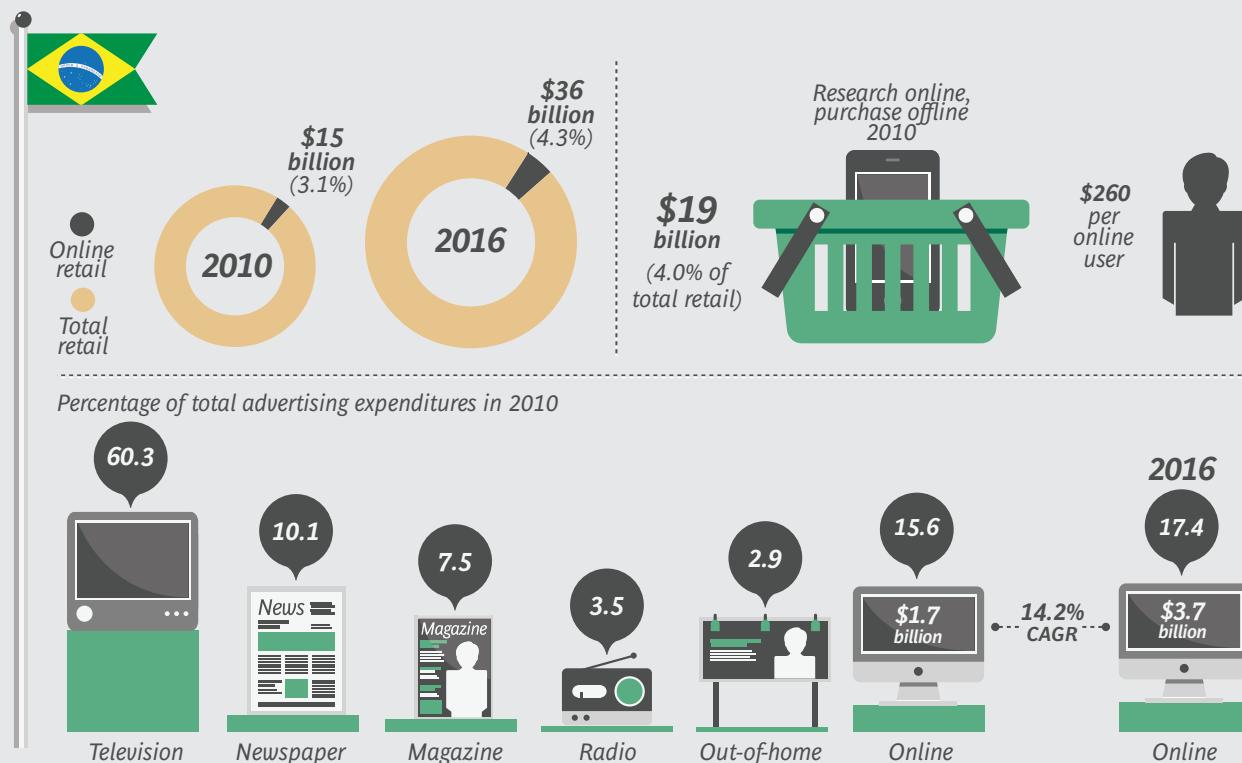
Brazil's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Brazilian Census Bureau (IBGE); EC; IMRG; ITU, U.K. Office for National Statistics (ONS); IE Market Research; CETIC; Teleco; CGI/ICT; Farabian; BCG analysis.

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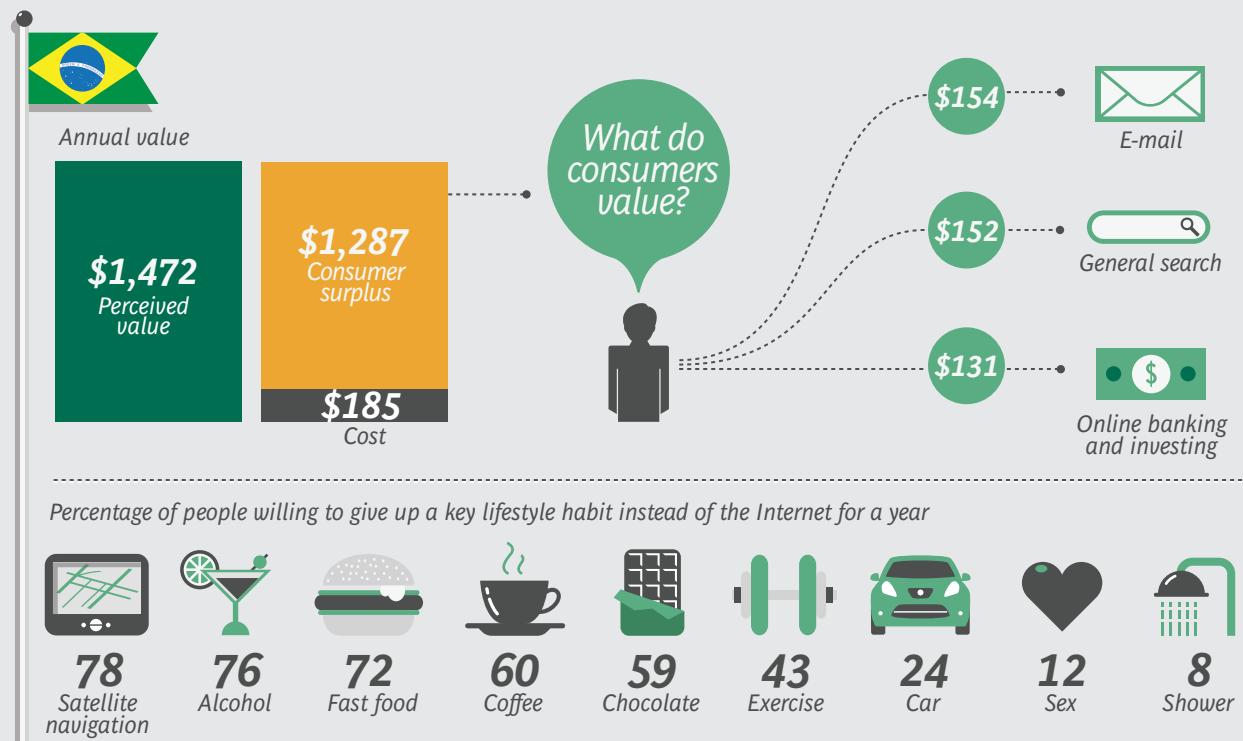
The Internet's Impact on Commerce in Brazil



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Brazilian Census Bureau (IBGE); EC; IMRG; ITU, U.K. Office for National Statistics (ONS); IE Market Research; CETIC; Teleco; CGI/ICT; Farabian; BCG analysis.

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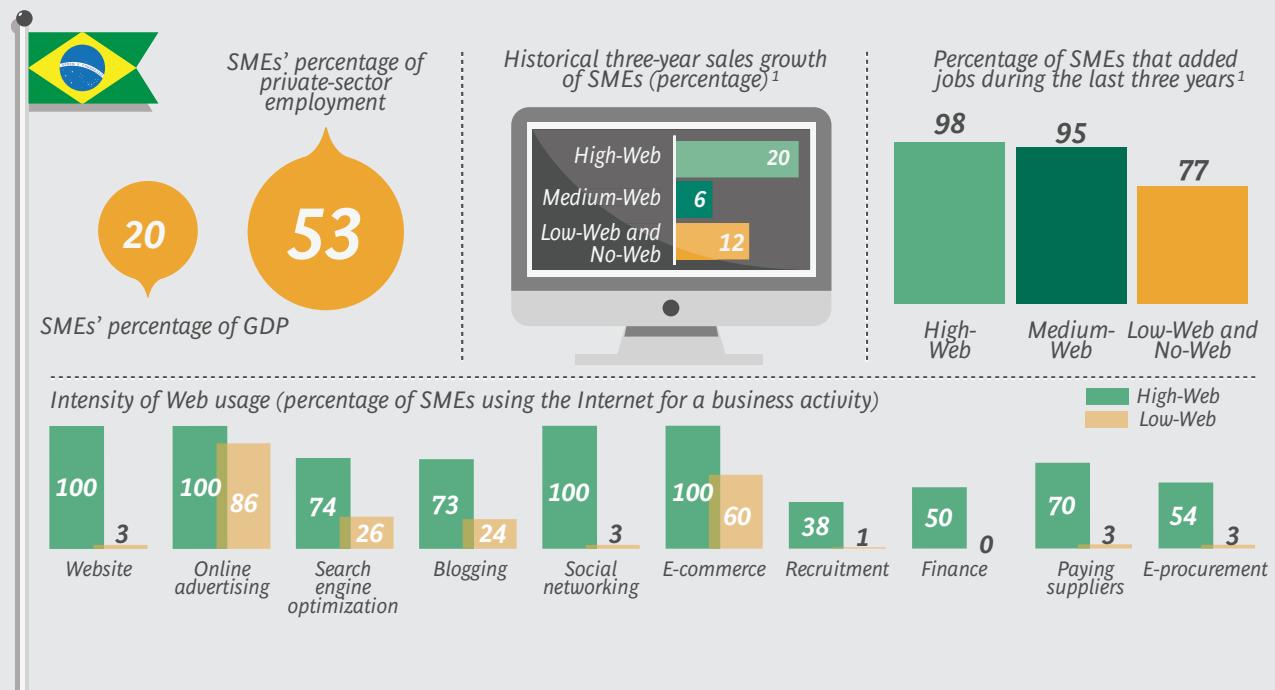
Brazil's Consumers Benefit from the Internet



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Brazilian Census Bureau (IBGE); EC; IMRG; ITU, U.K. Office for National Statistics (ONS); IE Market Research; CETIC; Teleco; CGI/ICT; Farabán; BCG analysis.

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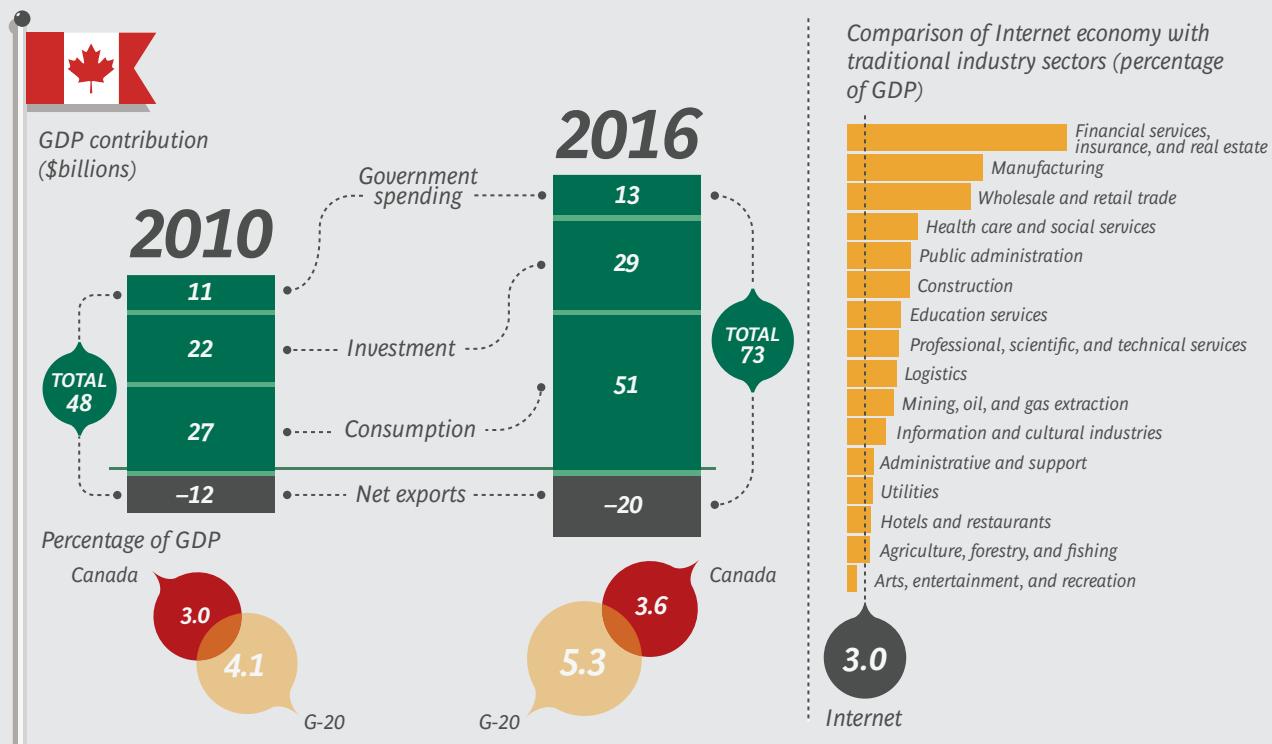
The Internet's Impact on Small and Medium Enterprises (SMEs) in Brazil



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Brazilian Census Bureau (IBGE); EC; IMRG; ITU, U.K. Office for National Statistics (ONS); IE Market Research; CETIC; Teleco; CGI/ICT; Farabán; BCG analysis.

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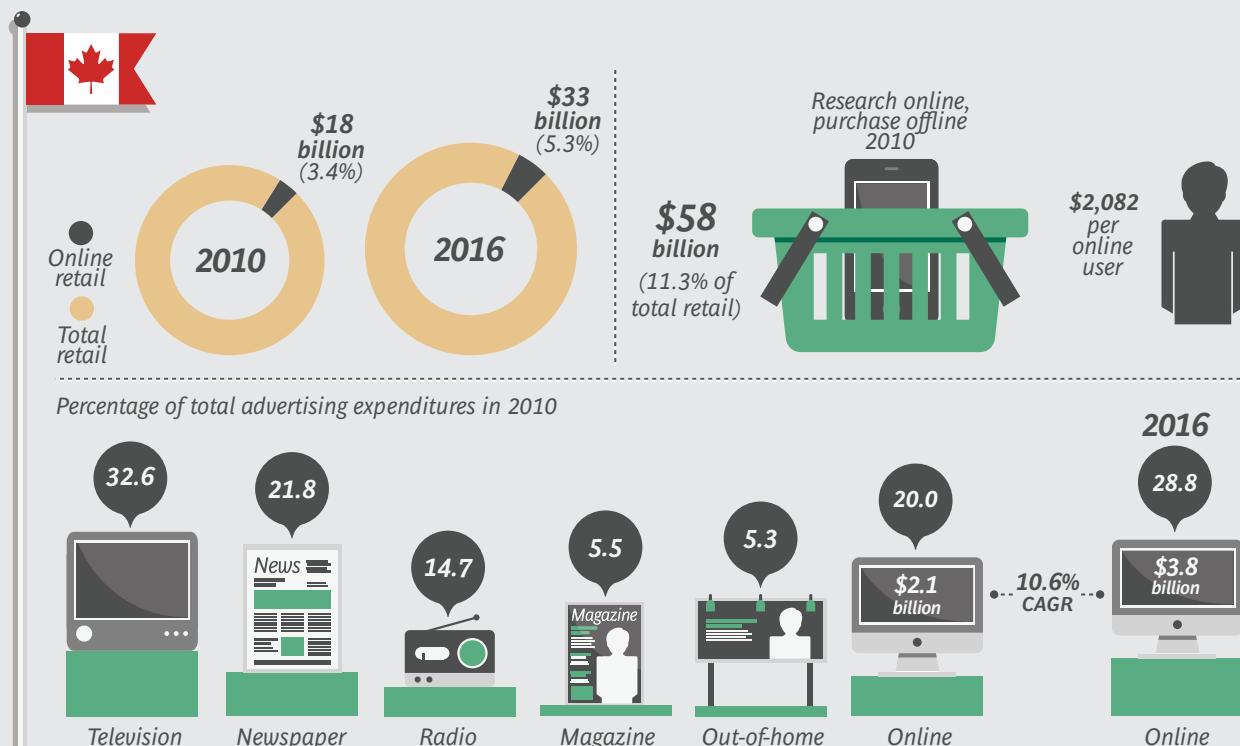
Canada's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; eMarketer; Statistics Canada; Retail Council of Canada; Industry Canada; AXCO; IEMR; H2; BCG analysis.

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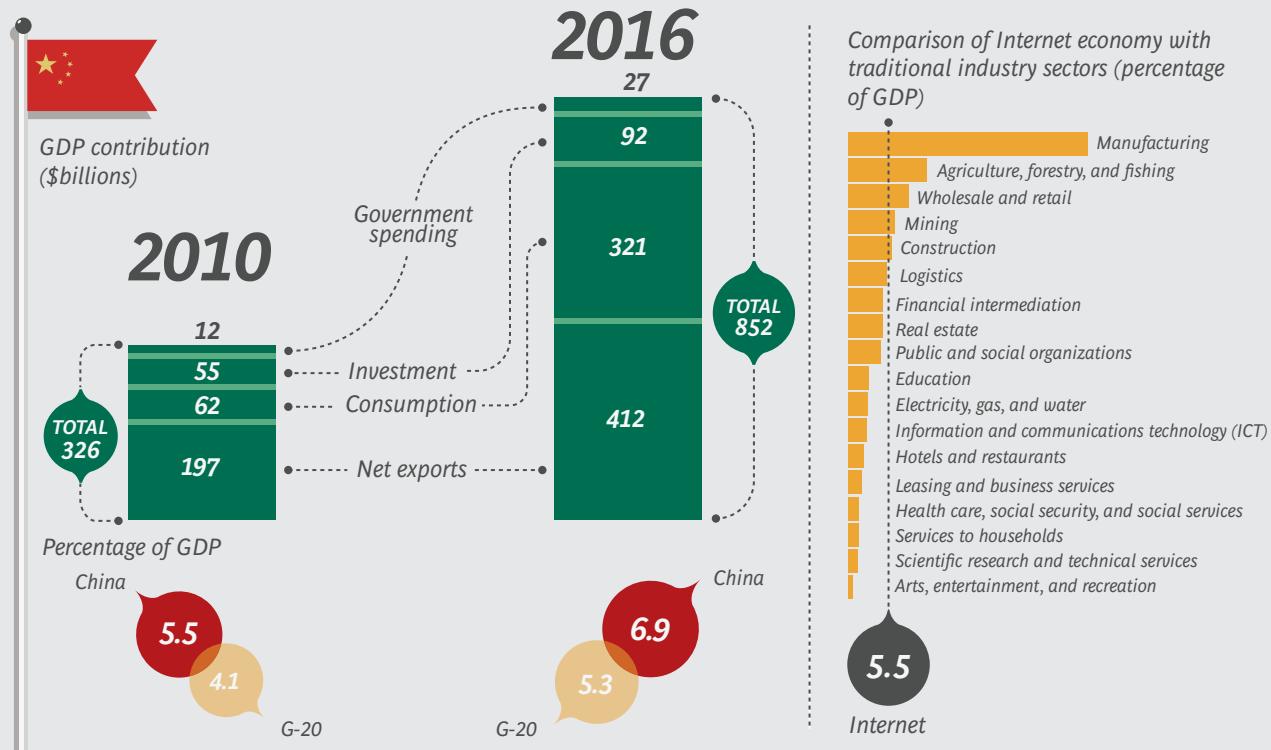
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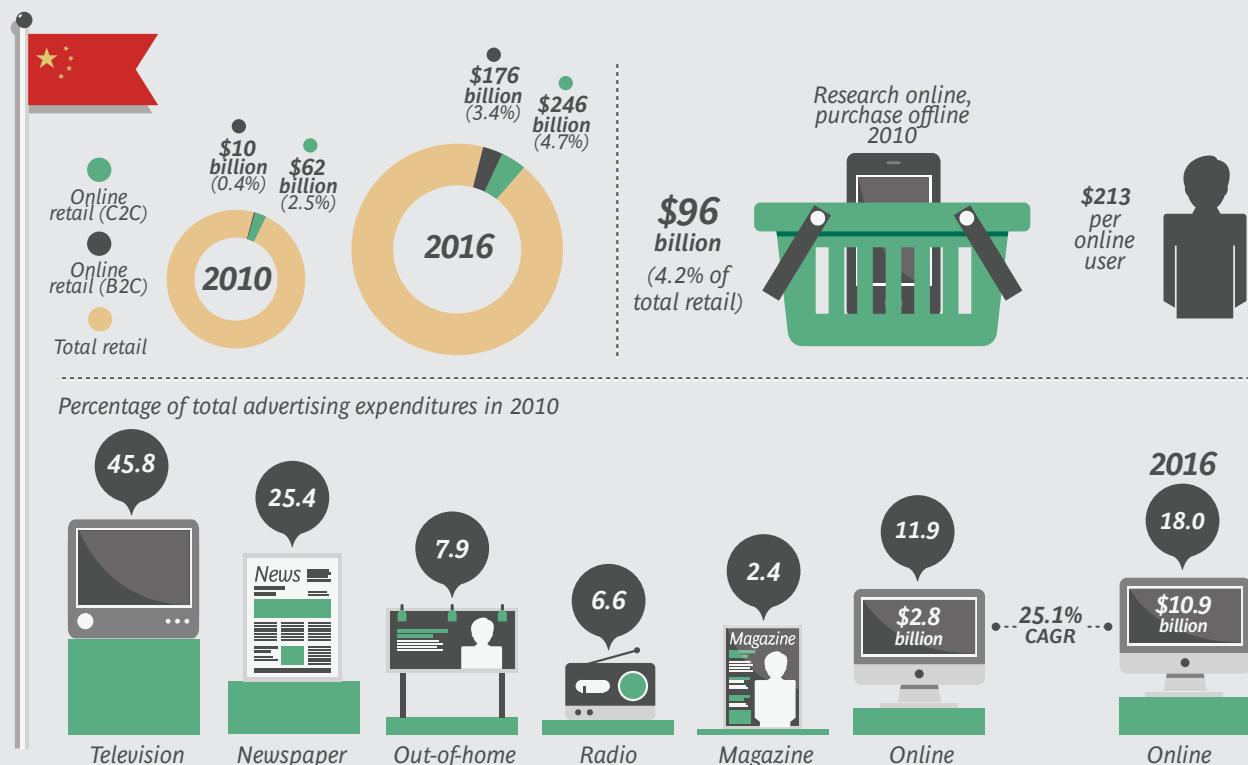
China's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Chinese government; iResearch; China Information Almanac; BCG analysis.

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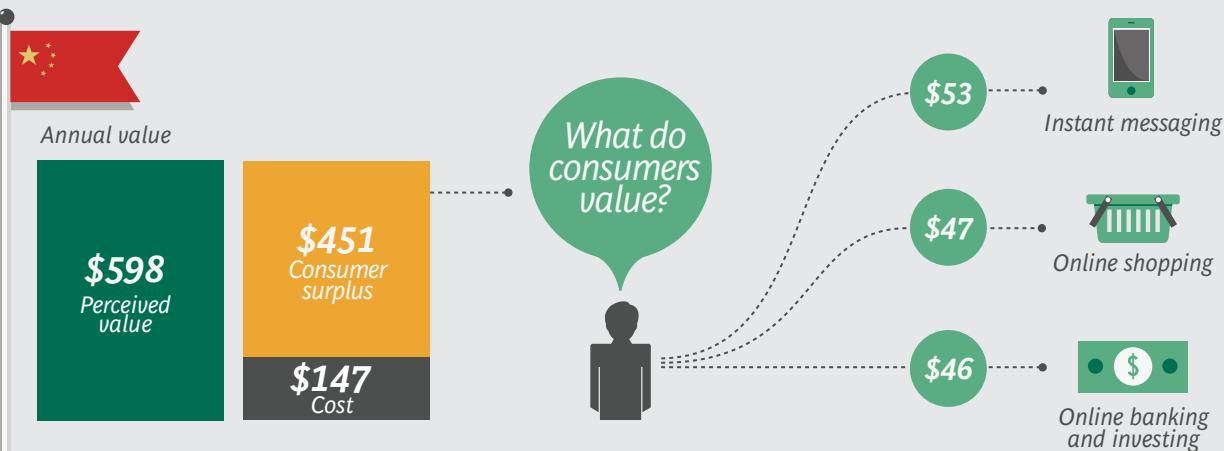
The Internet's Impact on Commerce in China



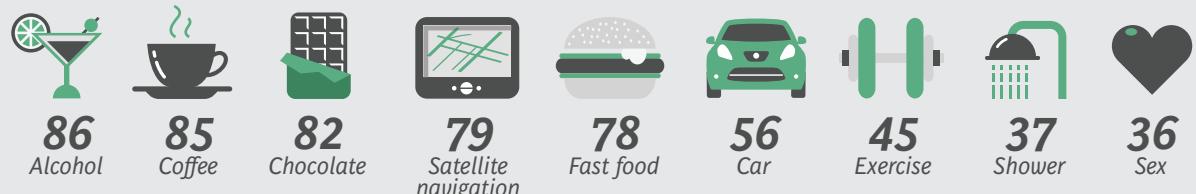
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China's Consumers Benefit from the Internet

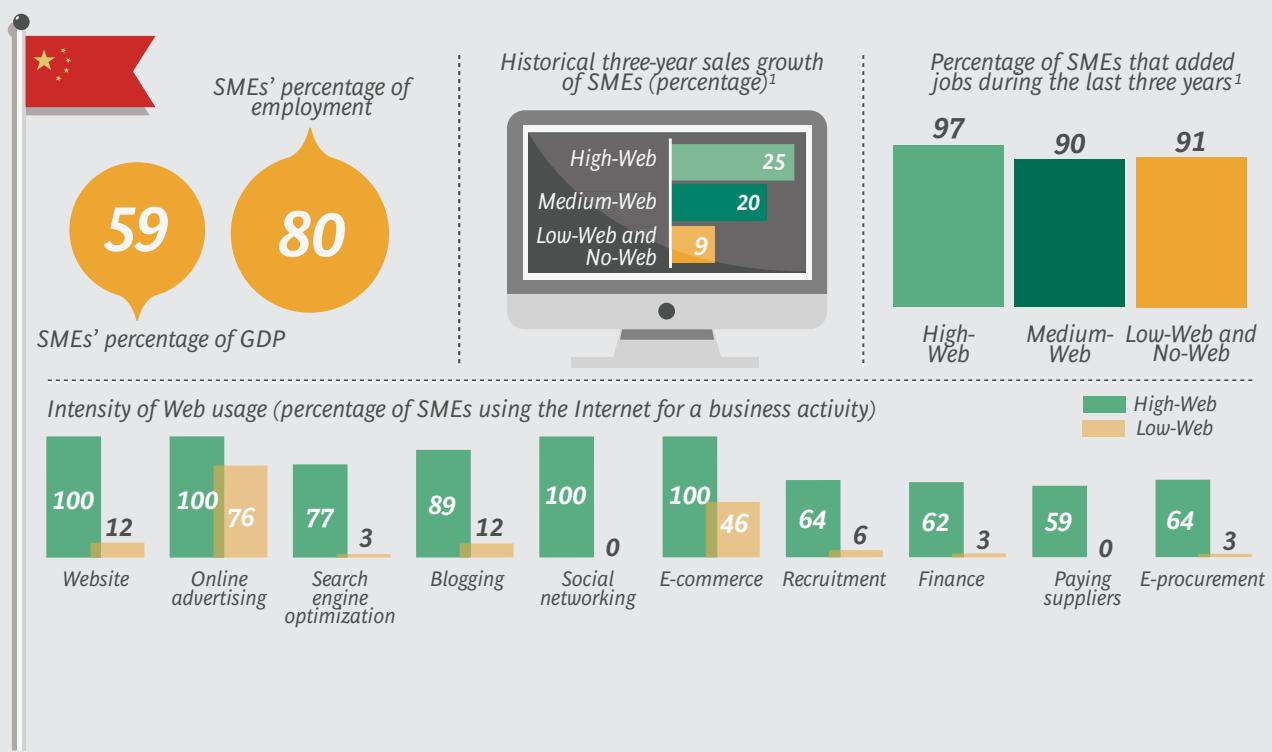


Percentage of people willing to give up a key lifestyle habit instead of the Internet for a year



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The Internet's Impact on Small and Medium Enterprises (SMEs) in China

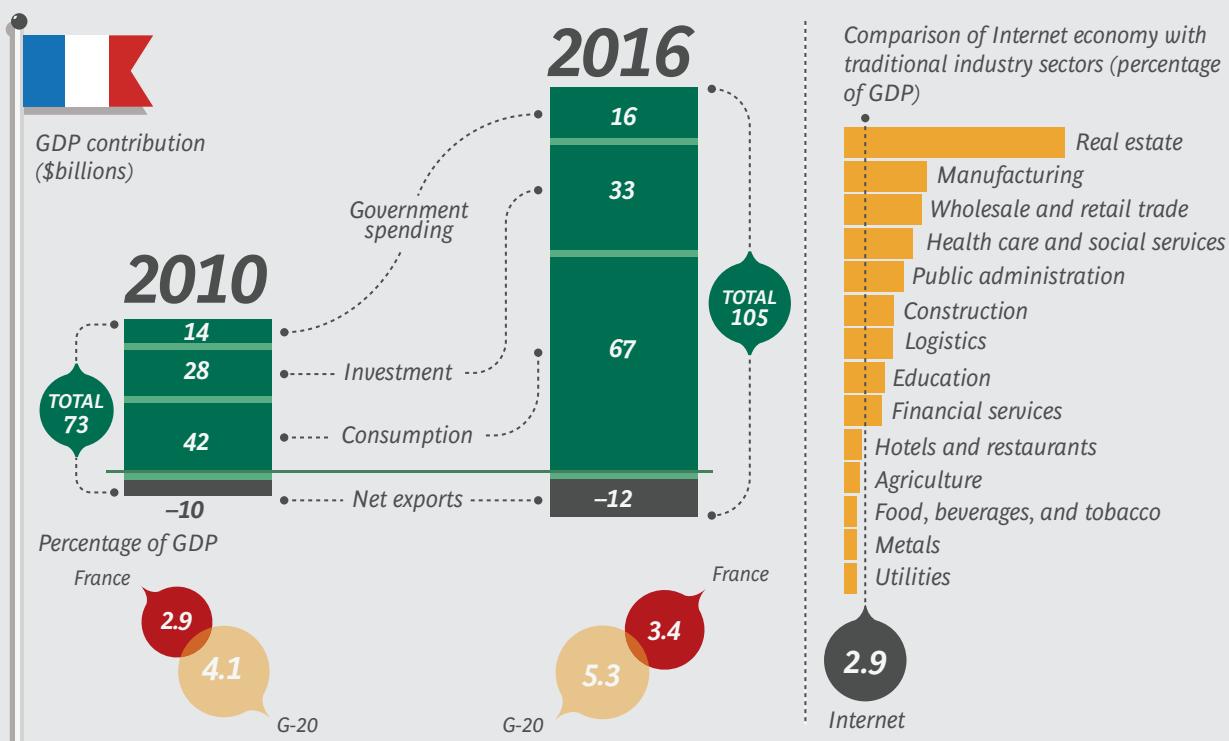


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²This percentage reflects fewer than 10 responses from no-Web SMEs.

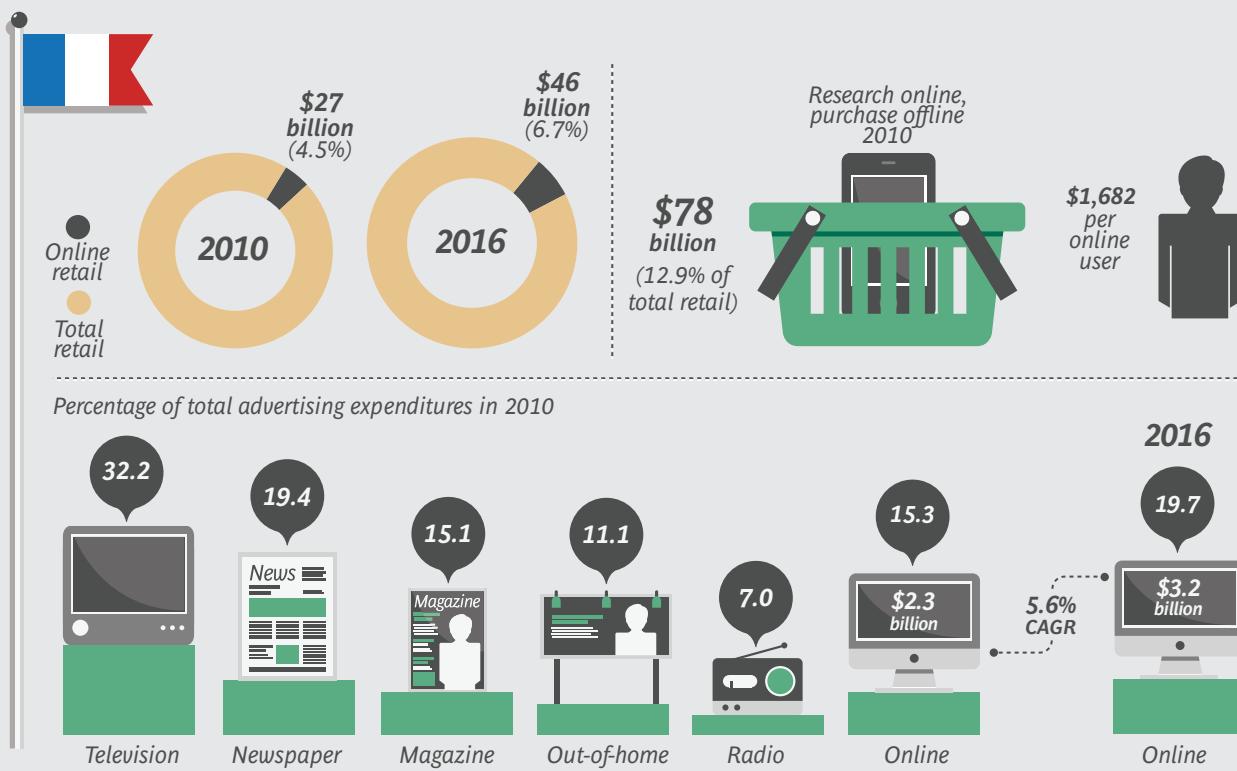
France's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; EC; H2; IE Market Research; IDS; INSEE; company reports; Eurostat; Forrester Research; AXCO; BCG analysis.

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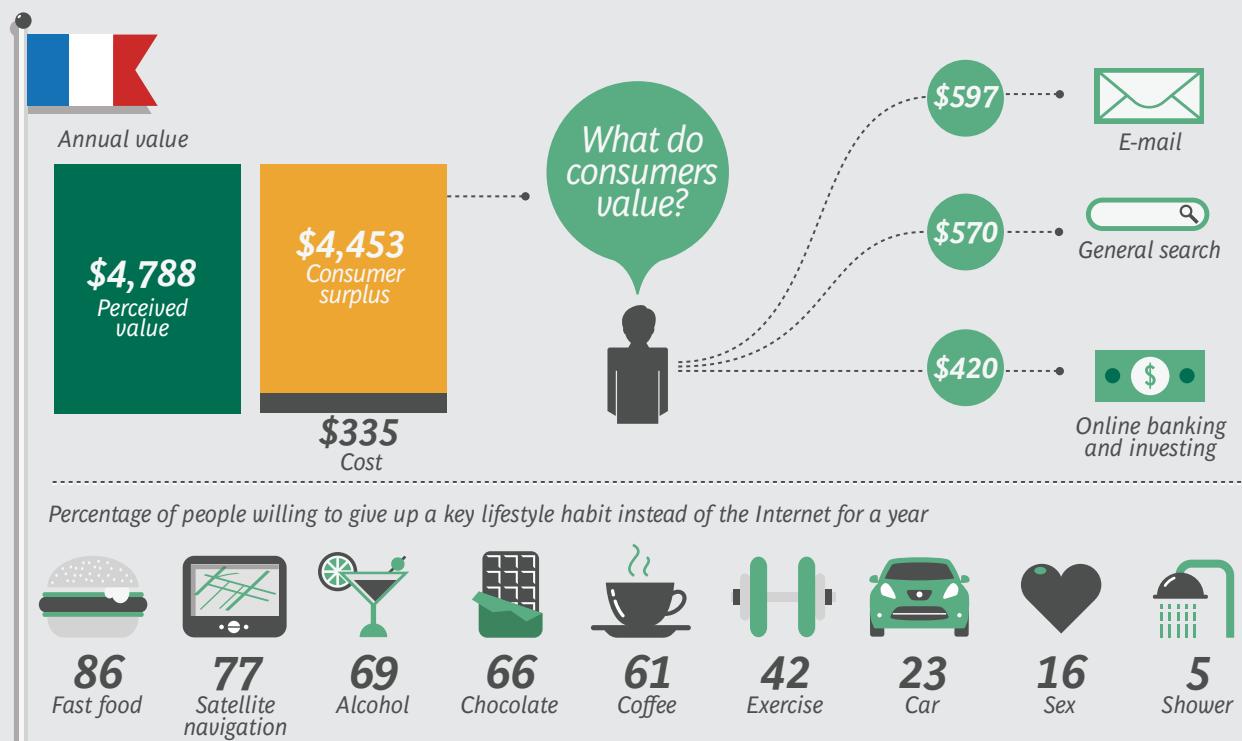
The Internet's Impact on Commerce in France



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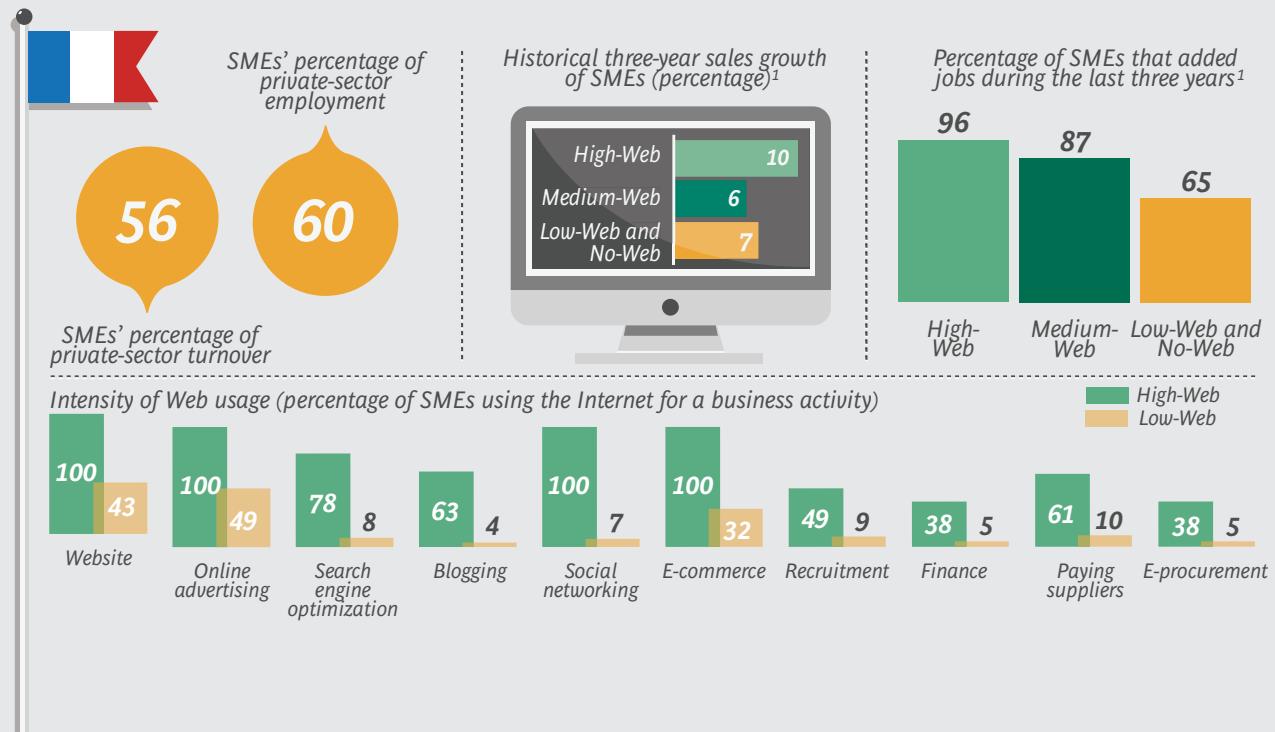
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France's Consumers Benefit from the Internet



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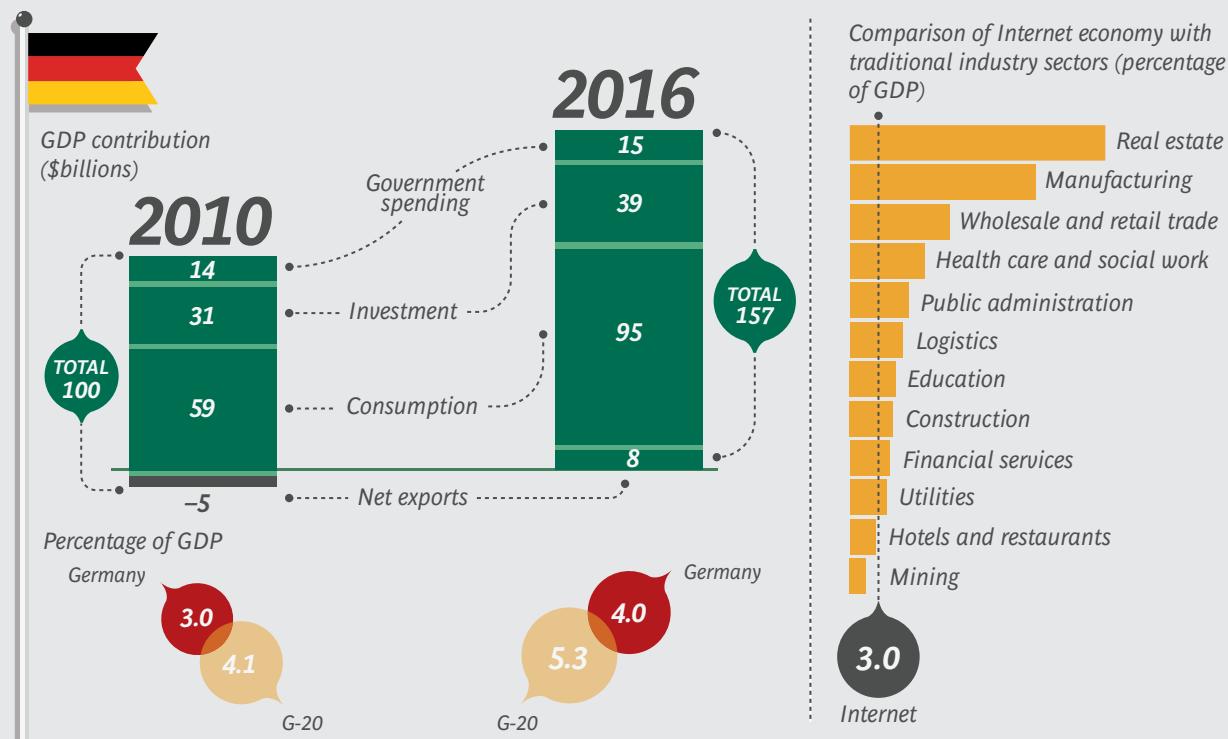
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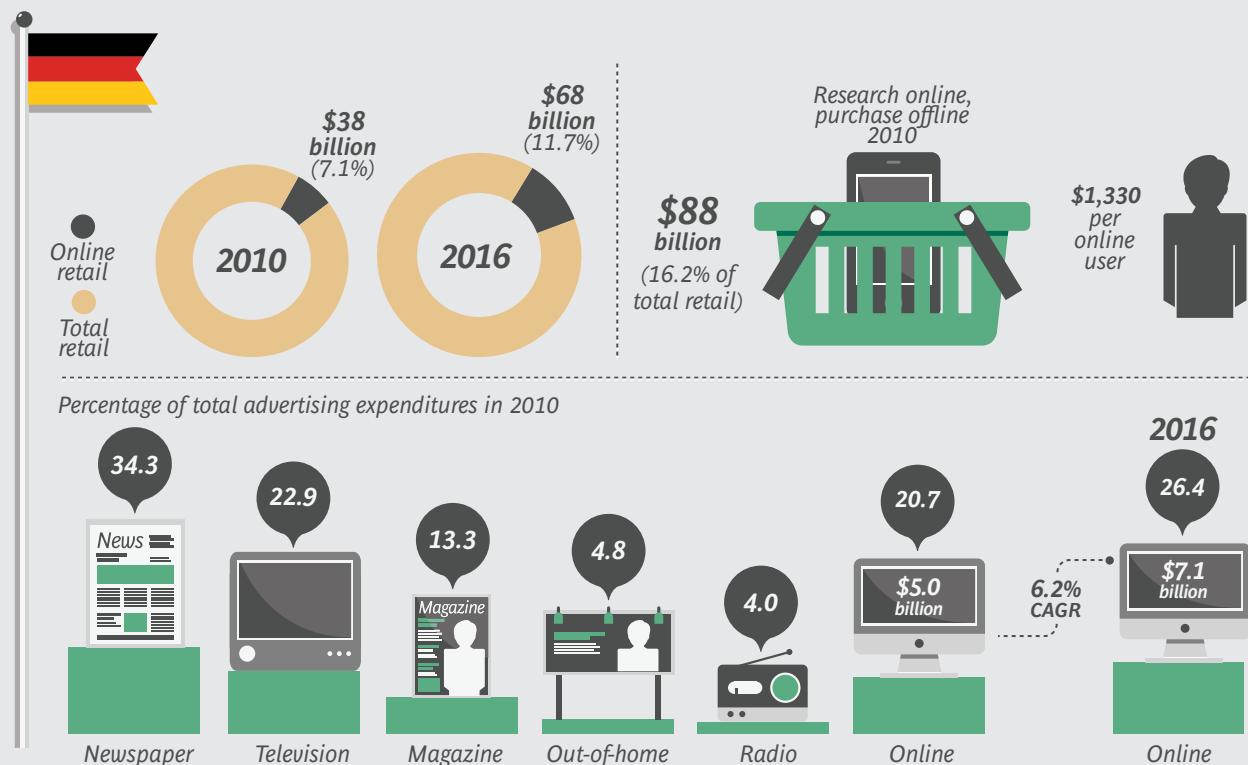
Germany's Internet Economy



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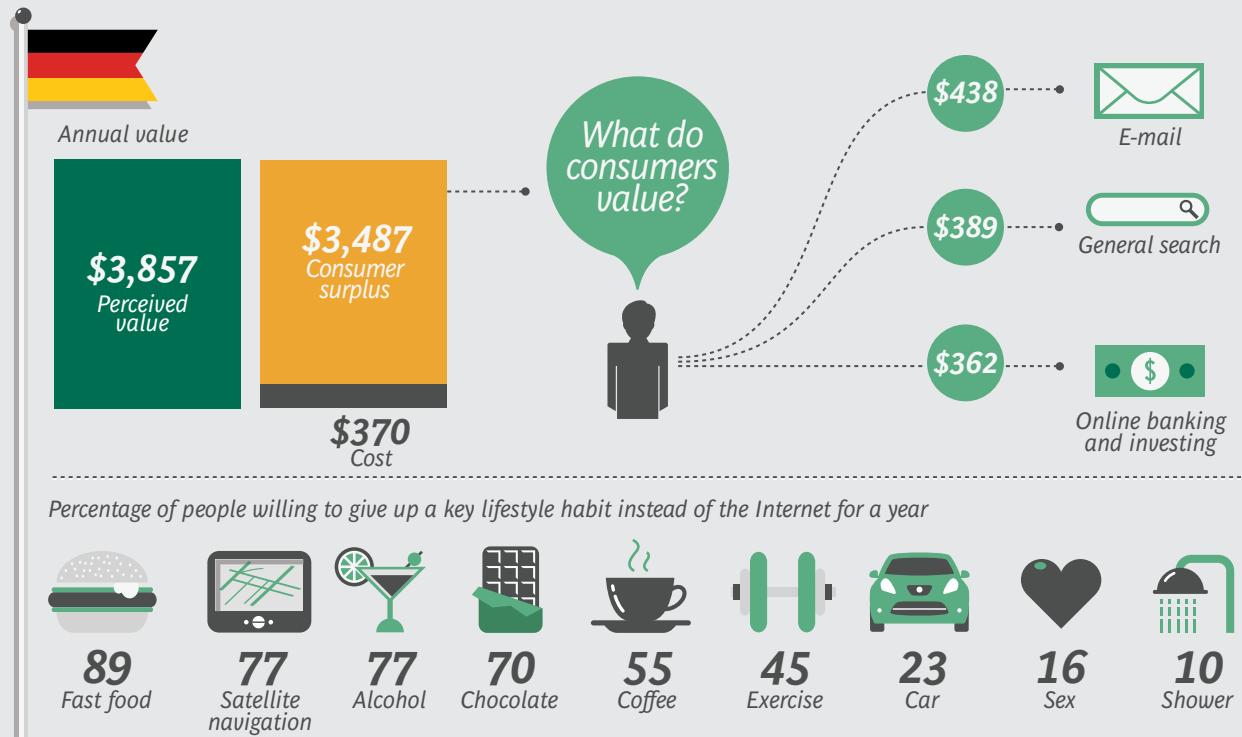
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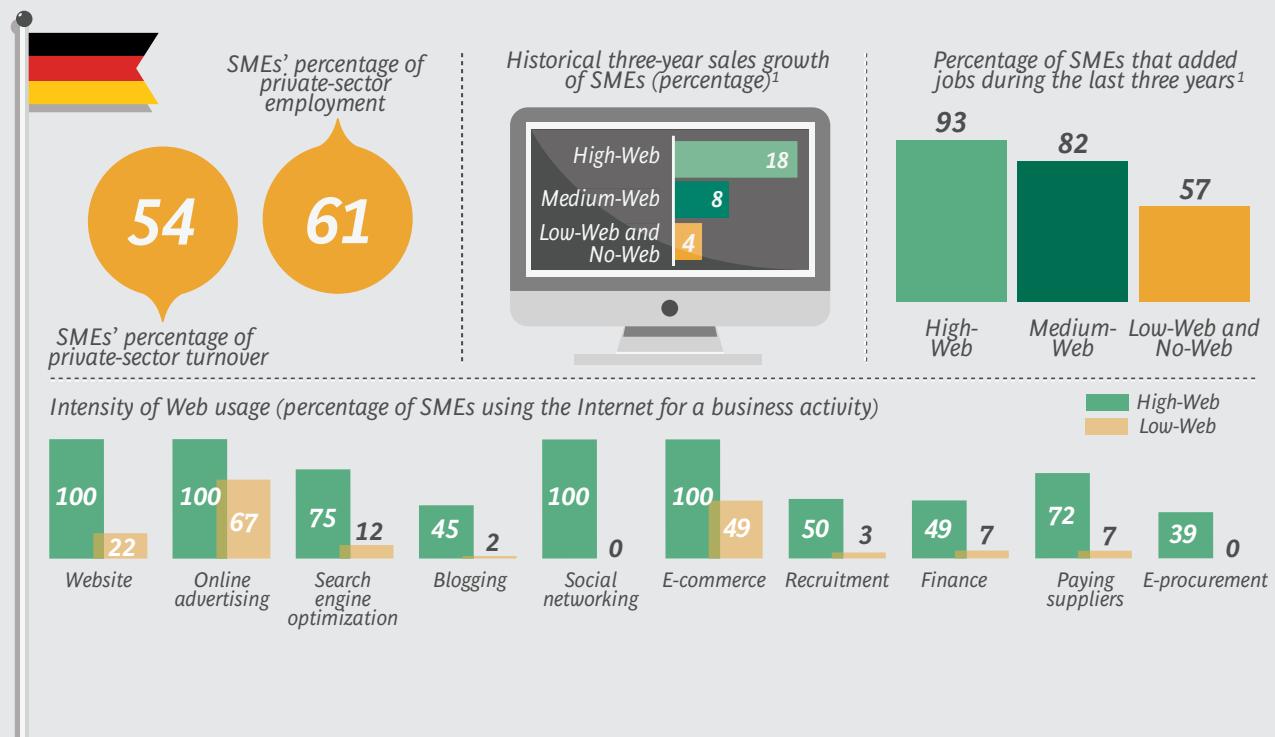
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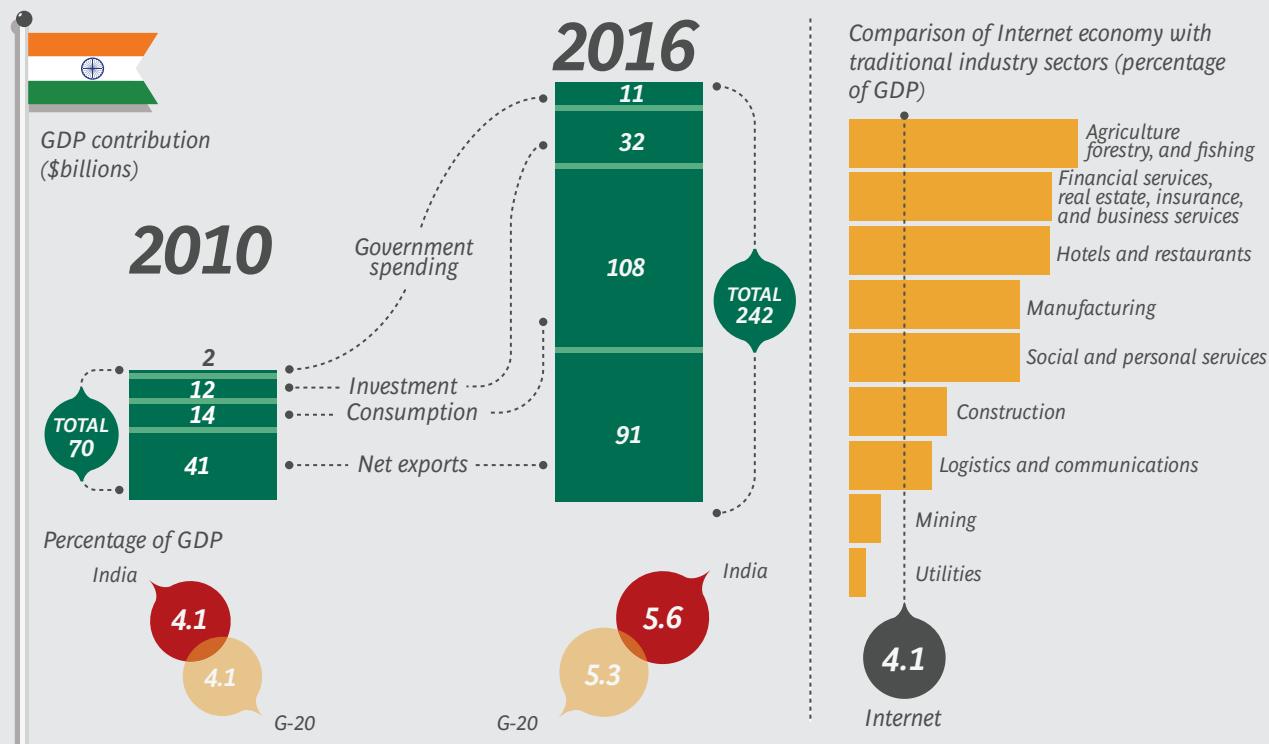
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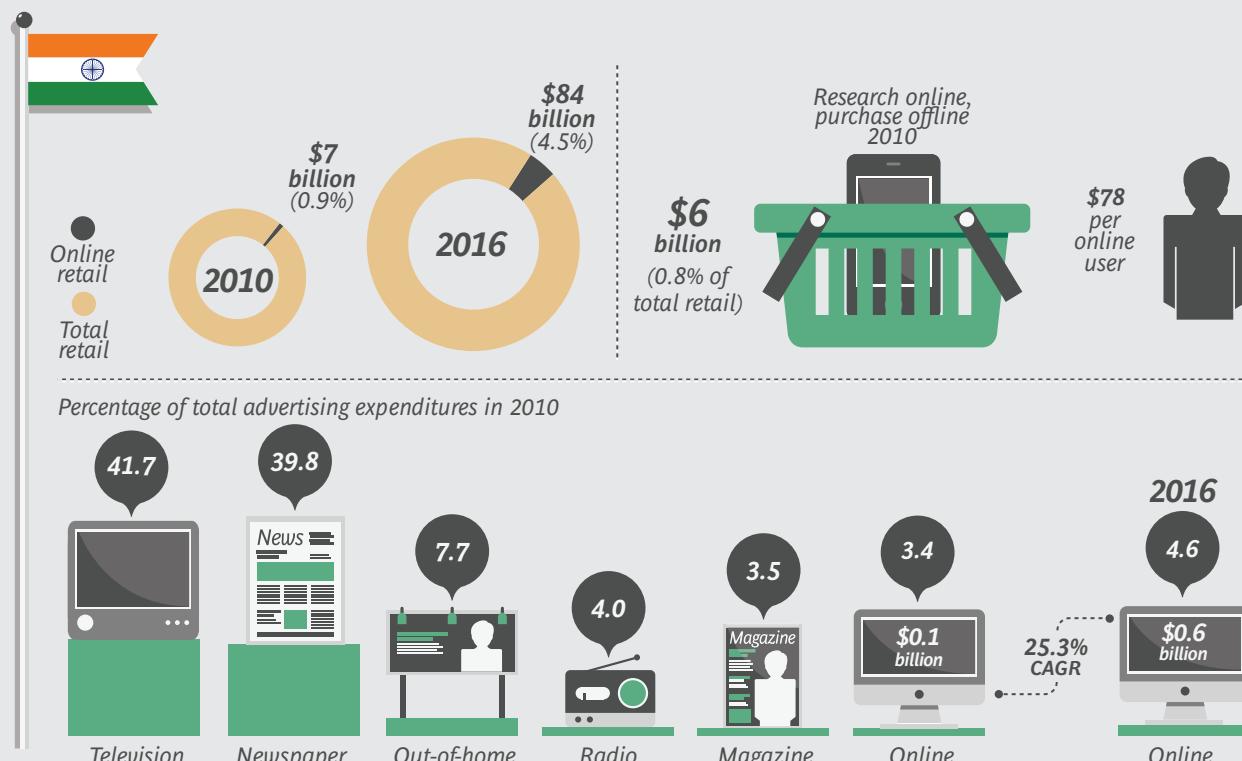
India's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; H2; Reserve Bank of India; Indian government; Telecom Regulatory Authority of India; NASSCOM; MediaNama; Trendstream; BCG analysis.

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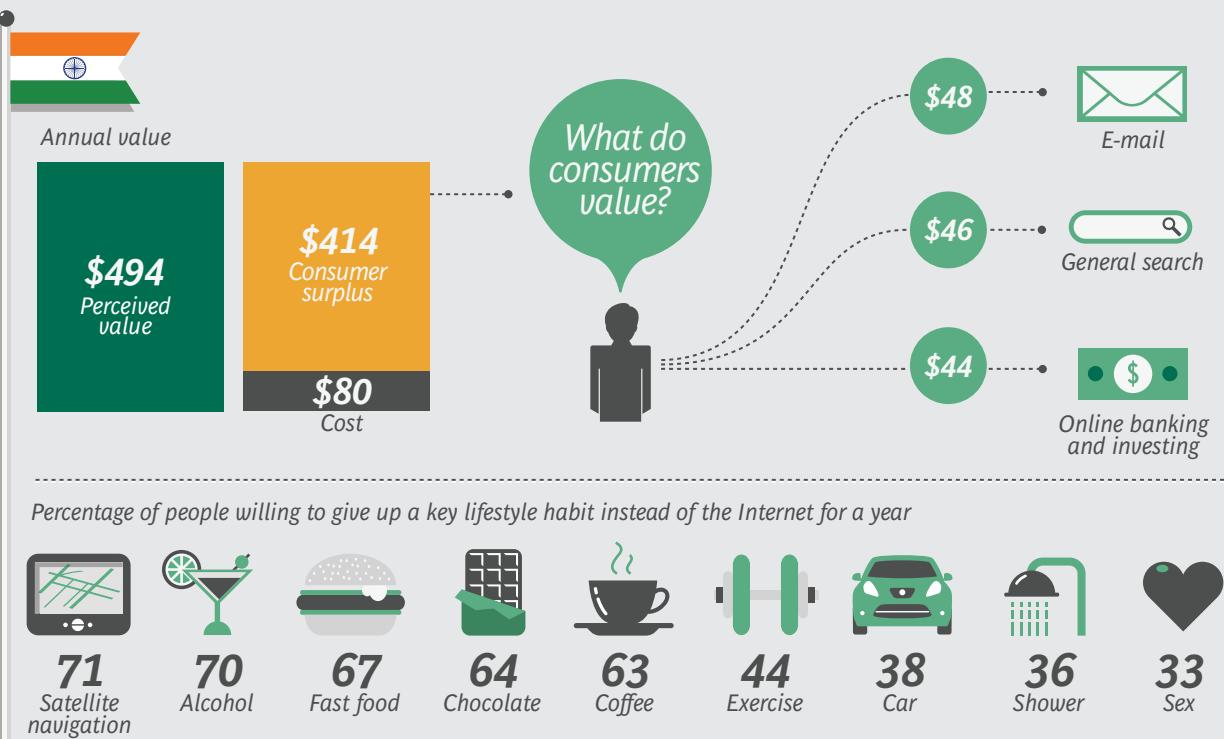
The Internet's Impact on Commerce in India



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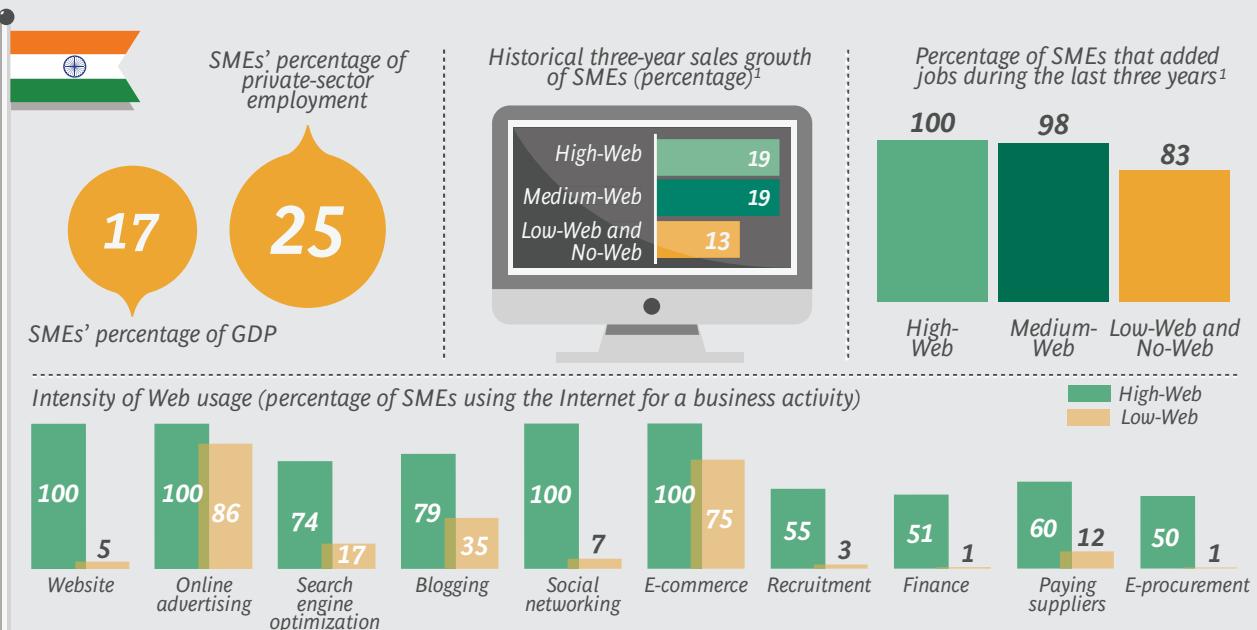
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India's Consumers Benefit from the Internet



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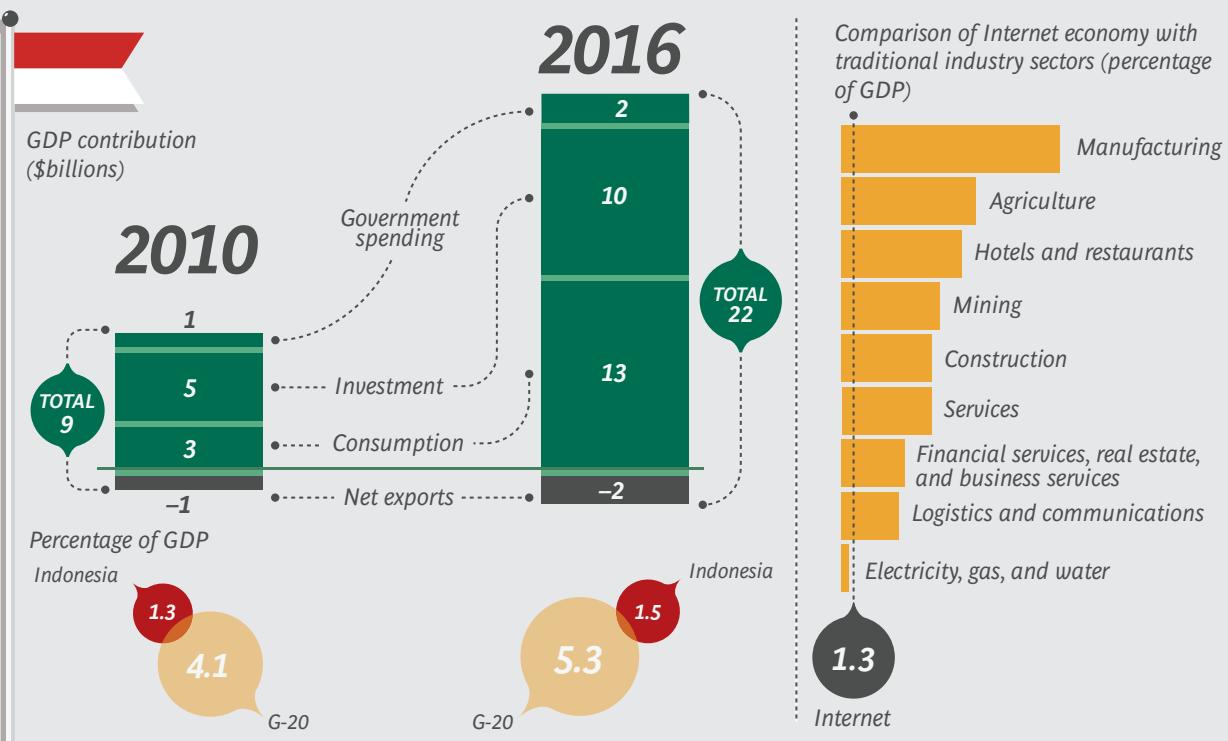
The Internet's Impact on Small and Medium Enterprises (SMEs) in India



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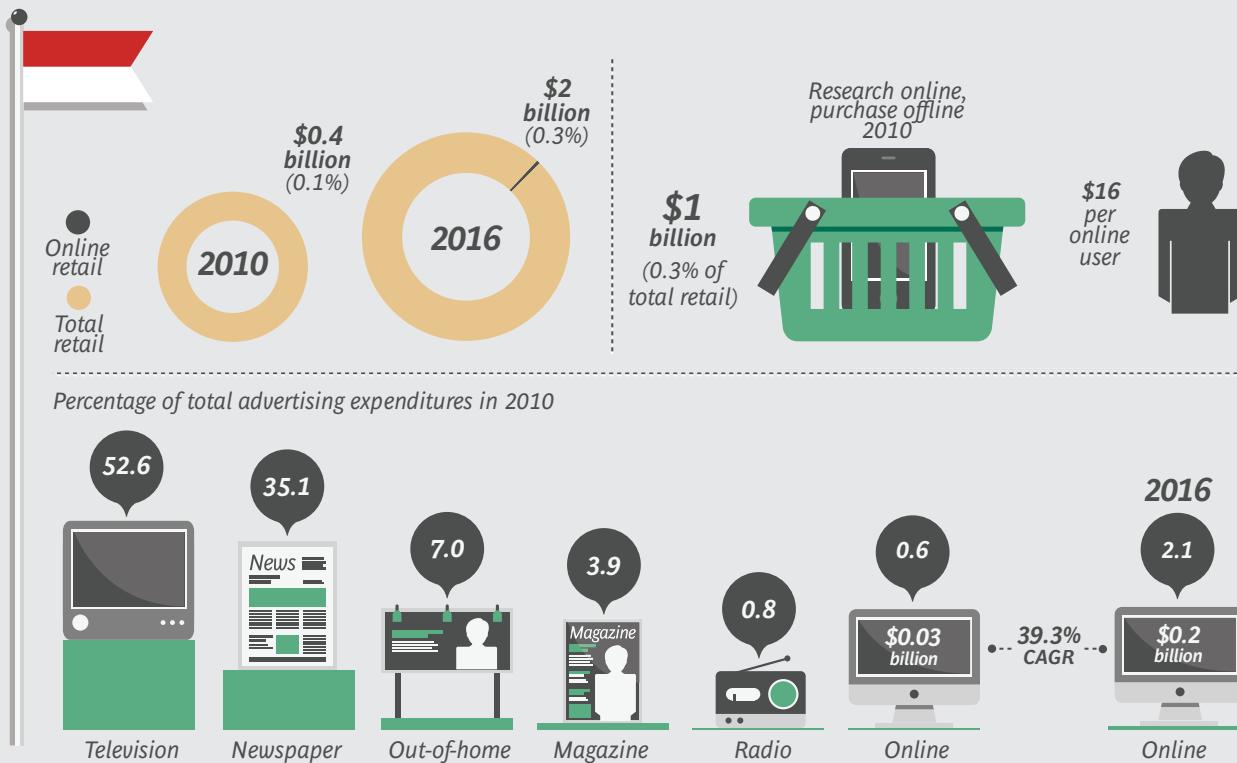
Indonesia's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Magnaglobal; CCB; APEC; PTIK; Nielsen; IDC; Statistics Indonesia; H2; Indikator TIK 2010; BCG analysis.

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The Internet's Impact on Commerce in Indonesia



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Indonesia's Consumers Benefit from the Internet



What do consumers value?

\$46

General search

\$43



\$36

Online banking and investing

Percentage of people willing to give up a key lifestyle habit instead of the Internet for a year



89

Alcohol



78

Chocolate



78

Shower



76

Satellite navigation



75

Coffee



73

Fast food



52

Exercise



34

Car



34

Sex

Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Magnaglobal; CCB; APEC; PTIK; Nielsen; IDC; Statistics Indonesia; H2; Indikator TIK 2010; BCG analysis.

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The Internet's Impact on Small and Medium Enterprises (SMEs) in Indonesia

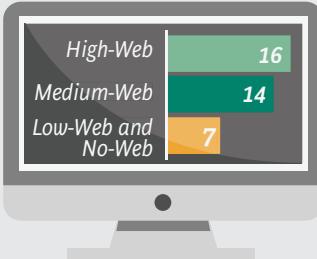


SMEs' percentage of private-sector employment

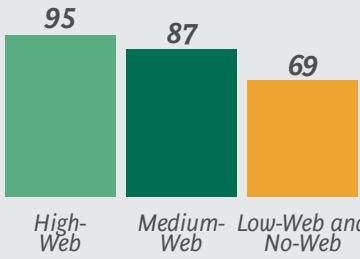


SMEs' percentage of GDP

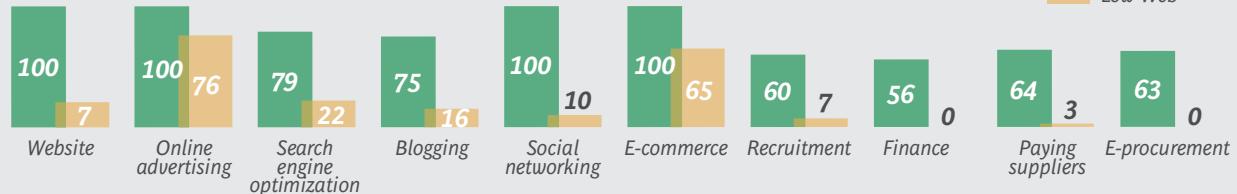
Historical three-year sales growth of SMEs (percentage)¹



Percentage of SMEs that added jobs during the last three years¹



Intensity of Web usage (percentage of SMEs using the Internet for a business activity)



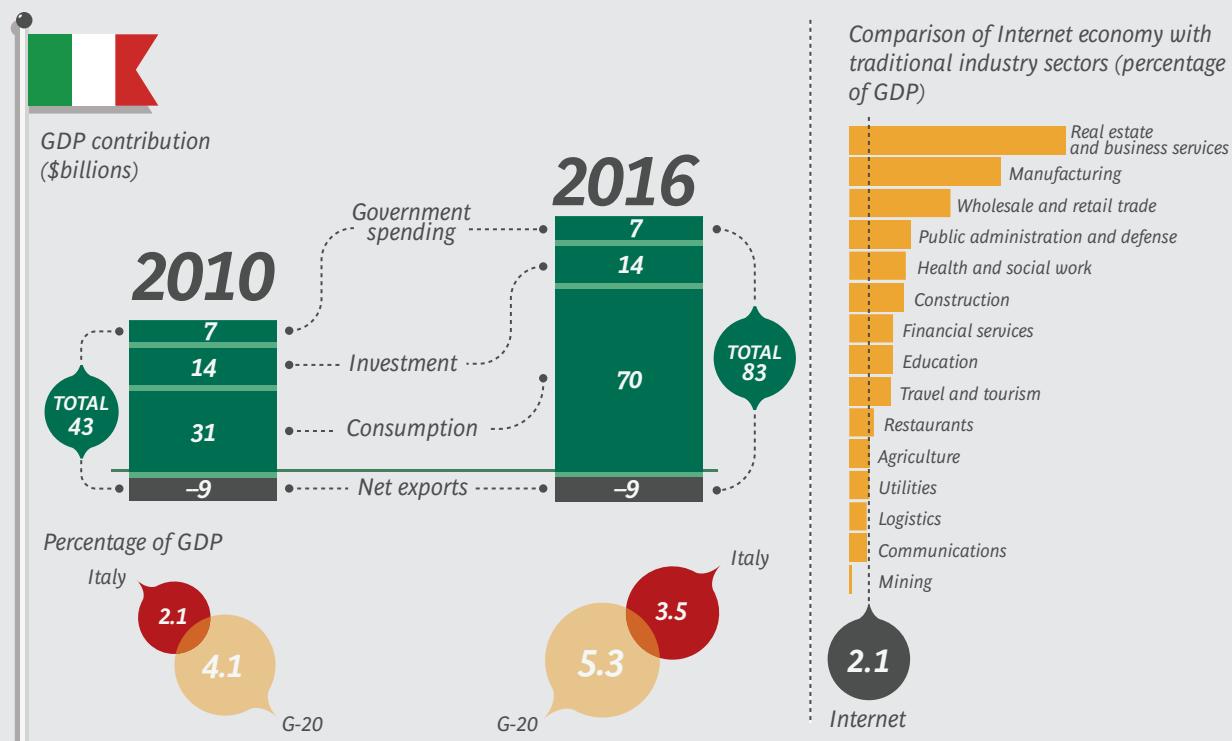
High-Web

Low-Web

Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Magnaglobal; CCB; APEC; PTIK; Nielsen; IDC; Statistics Indonesia; H2; Indikator TIK 2010; BCG analysis.

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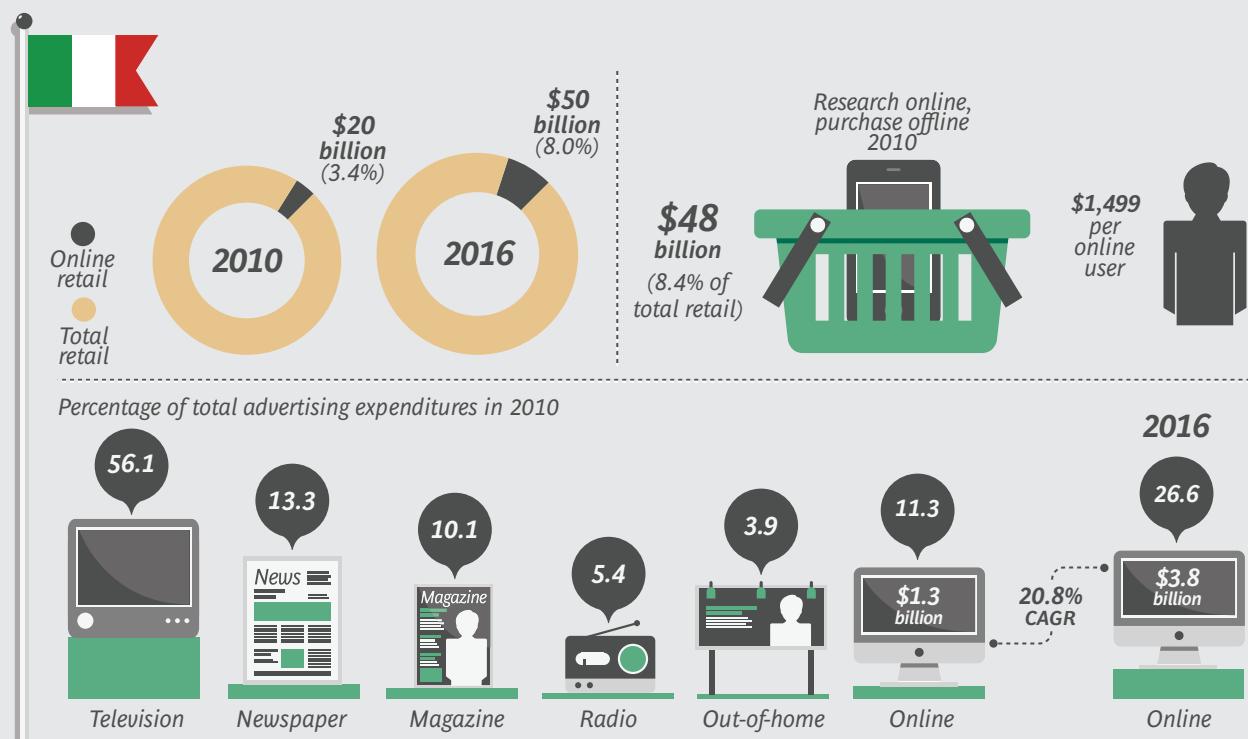
Italy's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Italian National Institute of Statistics (Istat); Politecnico di Milano (Polimi); Confindustria; Forrester Research; company reports; Assinform; BCG analysis.

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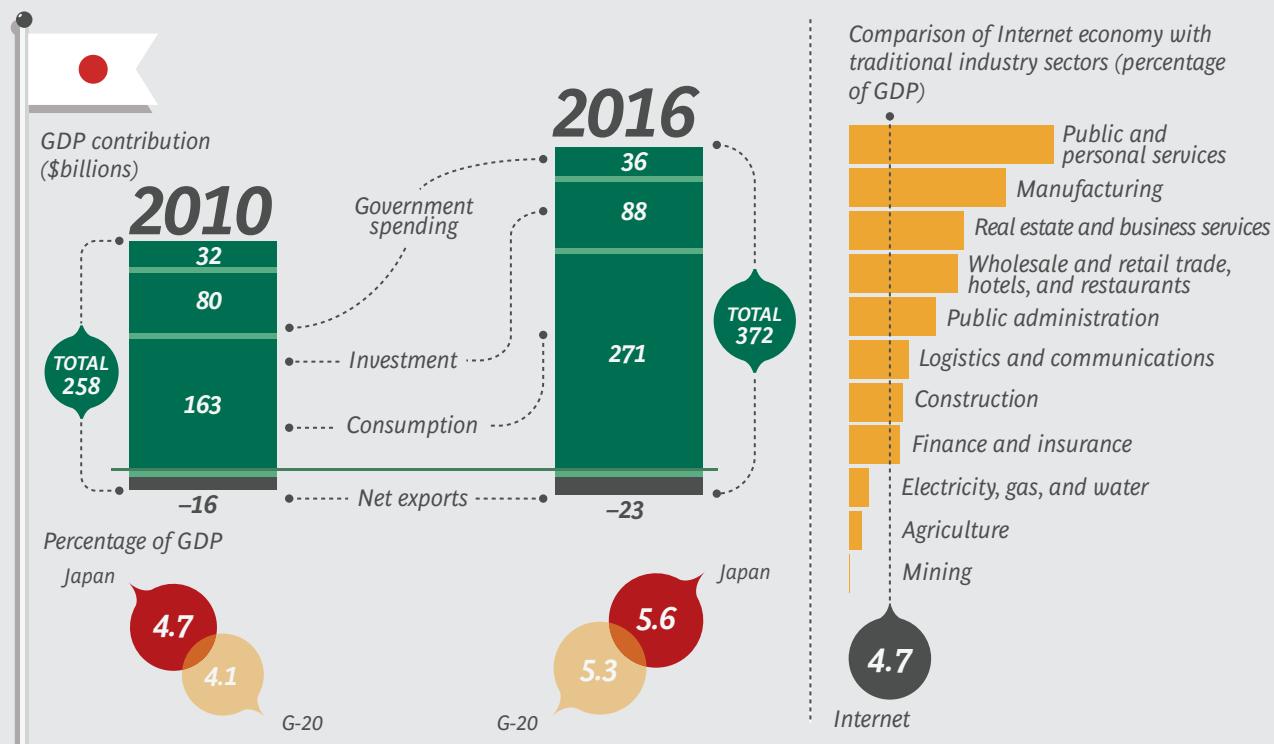
The Internet's Impact on Commerce in Italy



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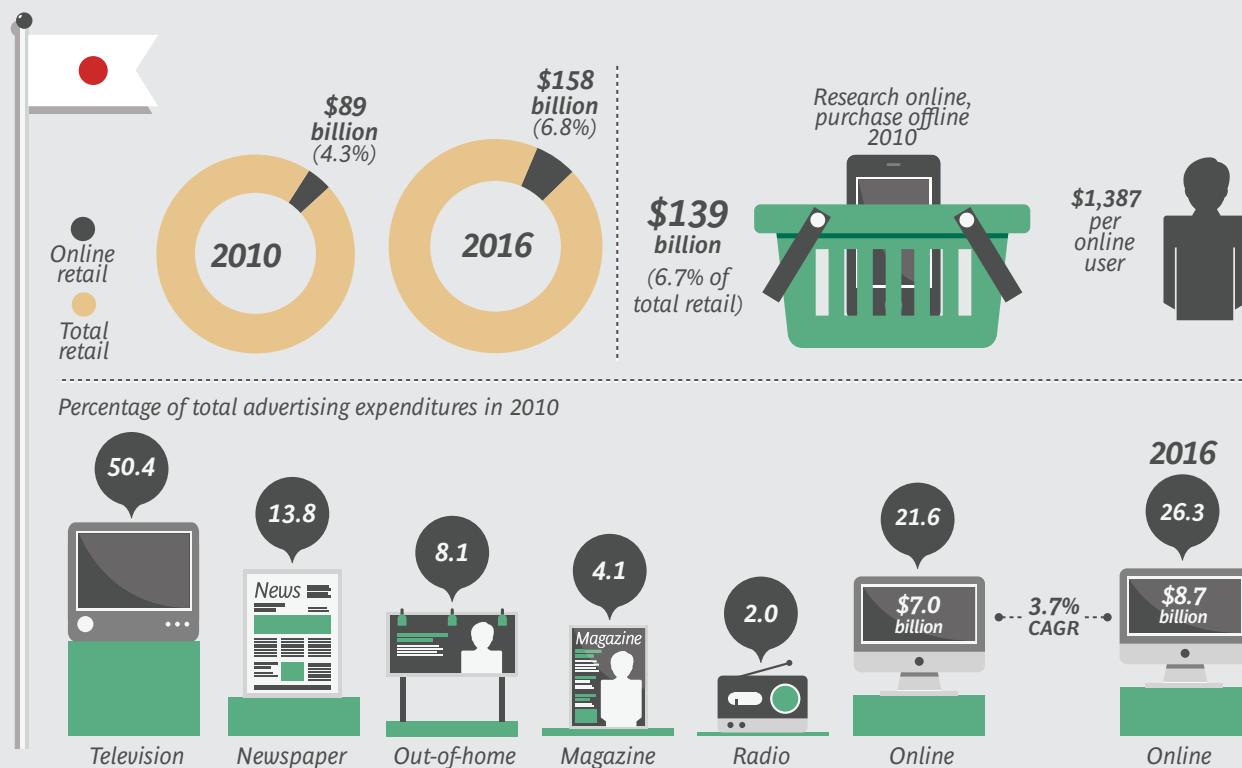
Japan's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Japanese government; IDC; FCR; Nomura Research Institute; Nielson; Japan External Trade Organization (JETRO); Dentsu; BCG analysis.

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The Internet's Impact on Commerce in Japan



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Japan's Consumers Benefit from the Internet

Annual value

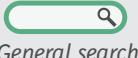


What do consumers value?

\$148



\$142



\$104



Percentage of people willing to give up a key lifestyle habit instead of the Internet for a year



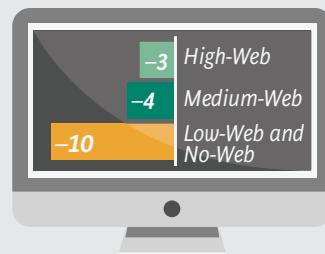
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The Internet's Impact on Small and Medium Enterprises (SMEs) in Japan

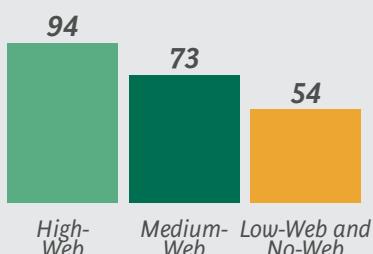


SMEs' percentage of private-sector employment

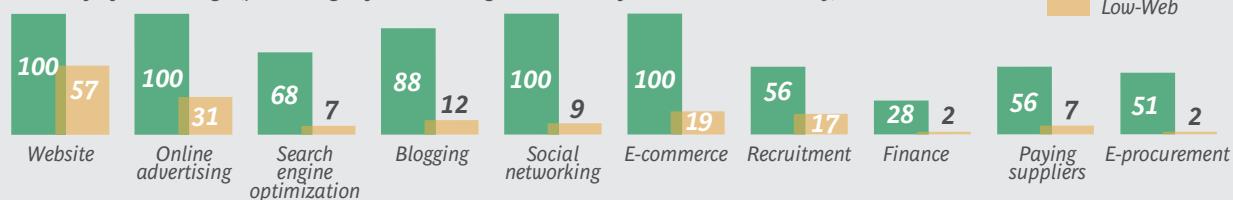
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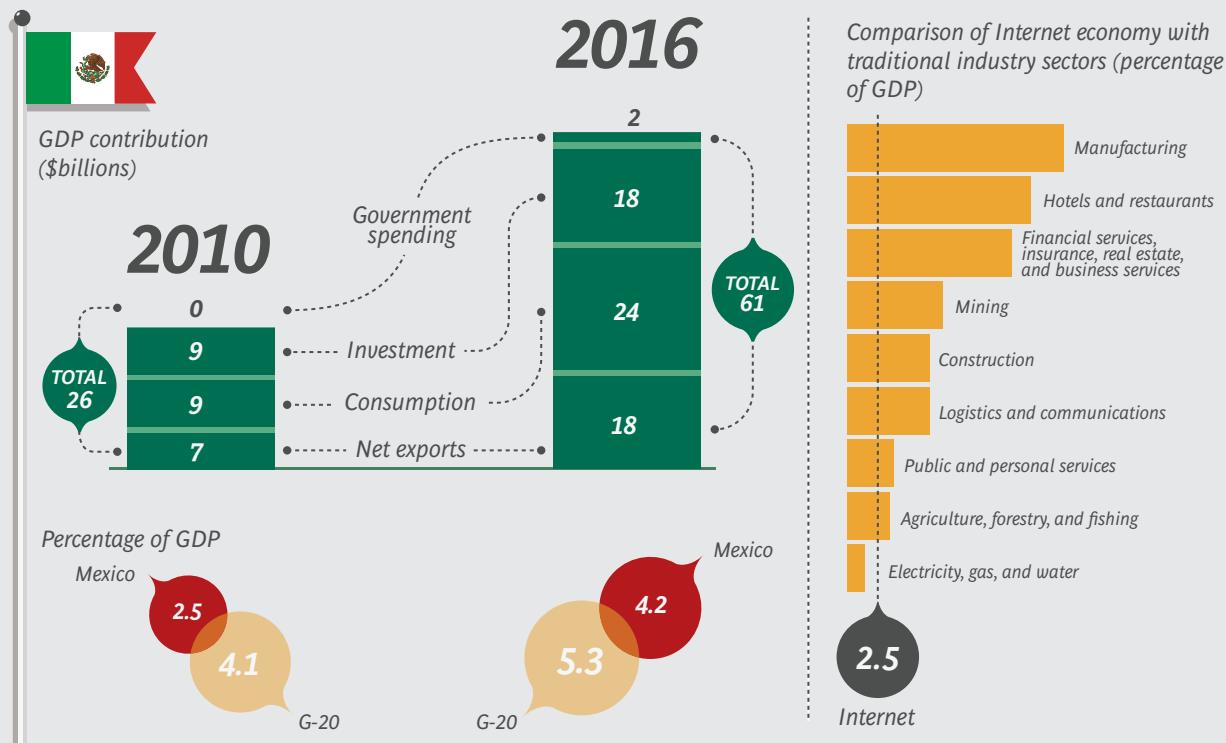
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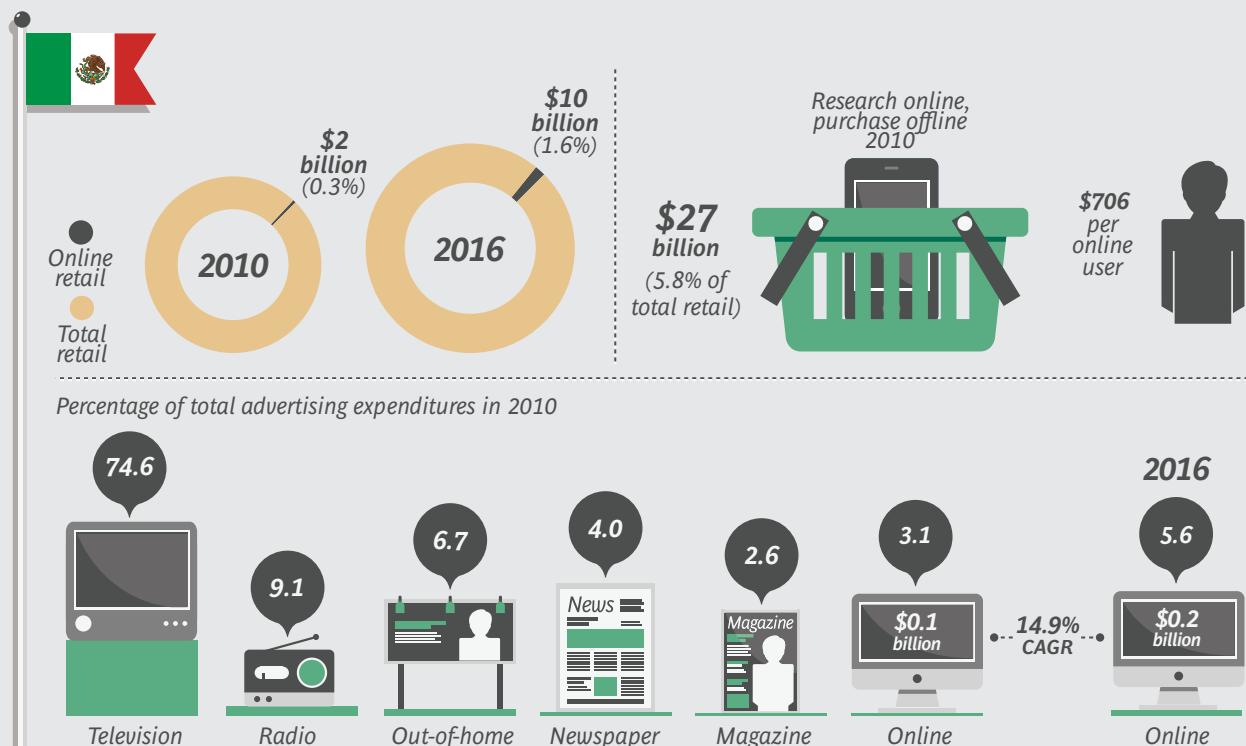
Mexico's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Banco de México; INEGI; company reports; BCG analysis.

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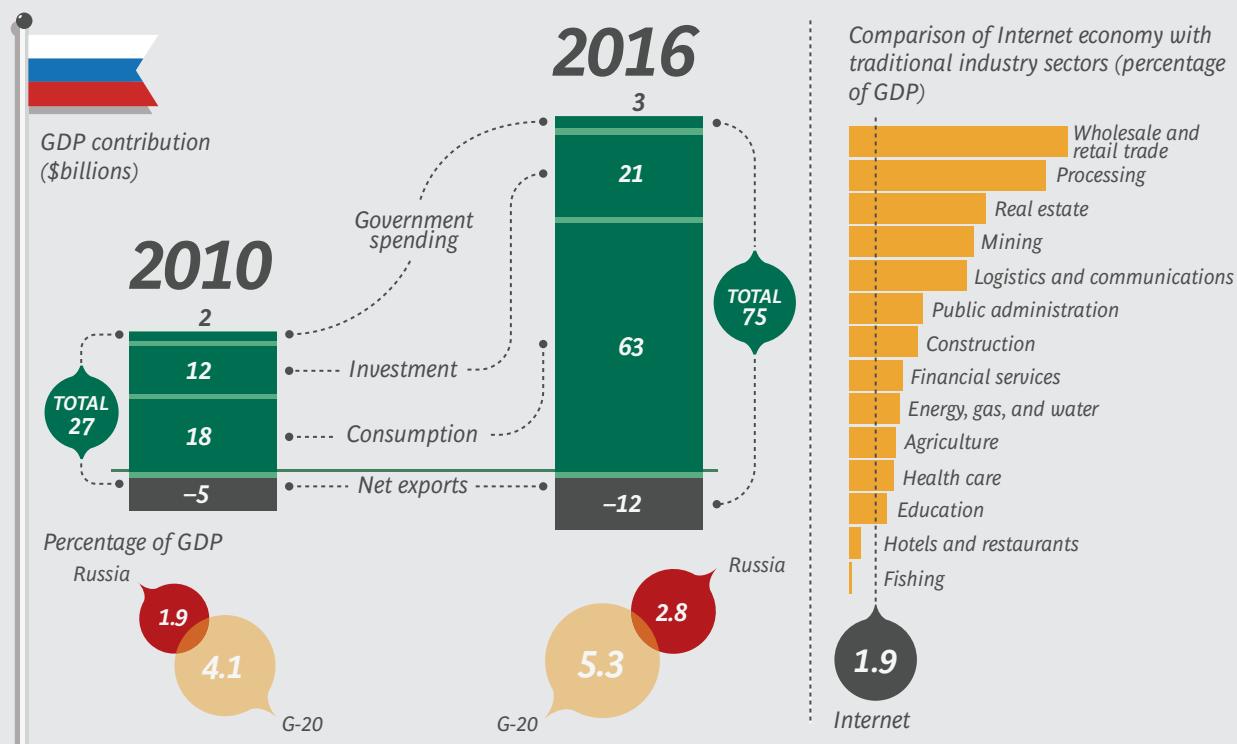
The Internet's Impact on Commerce in Mexico



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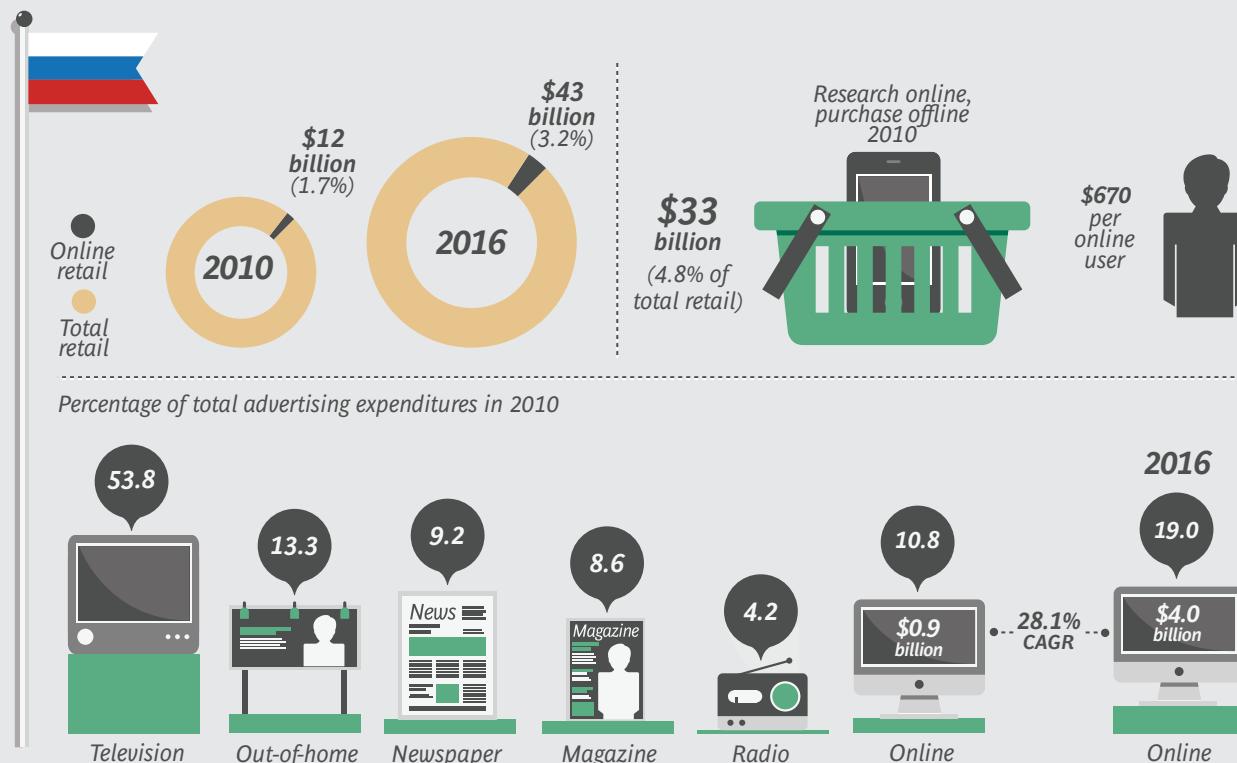
Russia's Internet Economy



Sources: Economist Intelligence Unit (EIU); Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Central Control Directorate (GKU); ITU; Datamonitor; HSE; InSales; IDC; TNS; company reports; BCG analysis.

Note: Some columns may not add up to total contributions due to rounding.

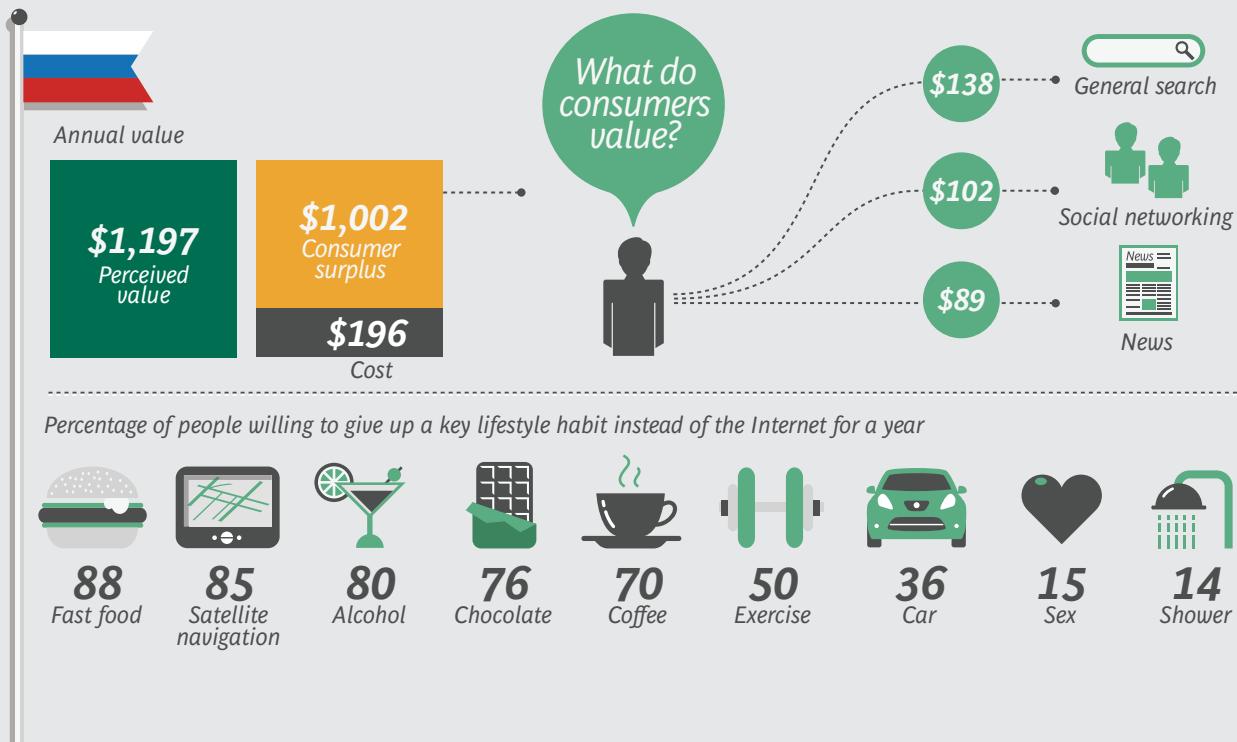
The Internet's Impact on Commerce in Russia



Sources: Economist Intelligence Unit (EIU); Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Central Control Directorate (GKU); ITU; Datamonitor; HSE; InSales; IDC; TNS; company reports; BCG analysis.

Note: Percentages may not total 100 due to rounding.

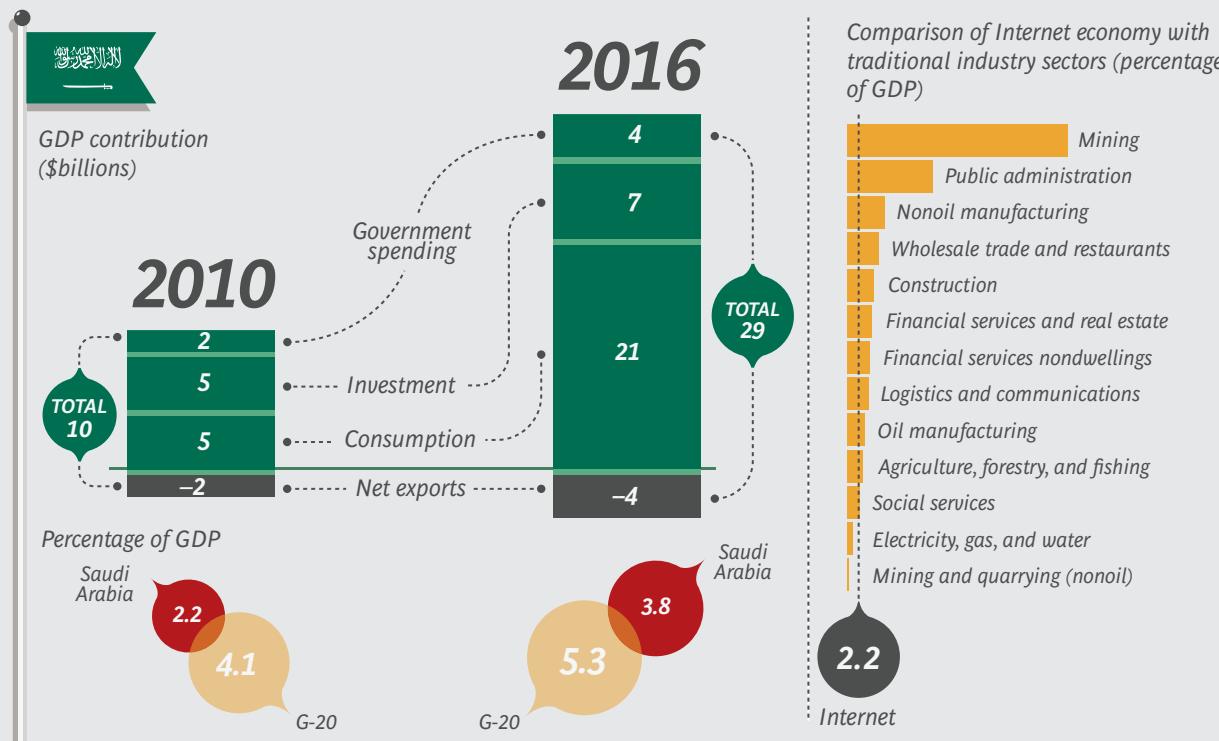
Russia's Consumers Benefit from the Internet



Sources: Economist Intelligence Unit (EIU); Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Central Control Directorate (GKU); ITU; Datamonitor; HSE; InSales; IDC; TNS; company reports; BCG analysis.

Note: Due to rounding, perceived value does not total consumer surplus plus cost.

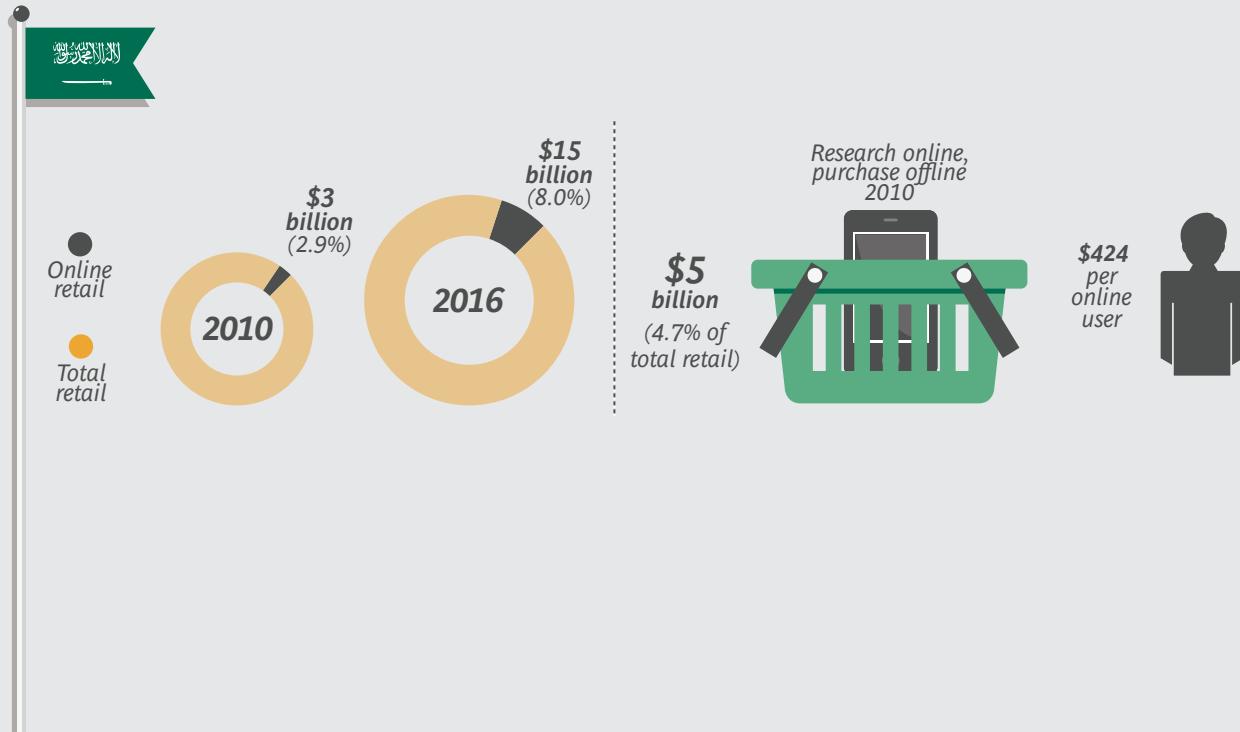
Saudi Arabia's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); CCB; Saudi Arabia Central Department of Statistics and Information; Arab Advisors Group; Pyramid Research; IEMR; company reports; World Bank; BCG analysis.

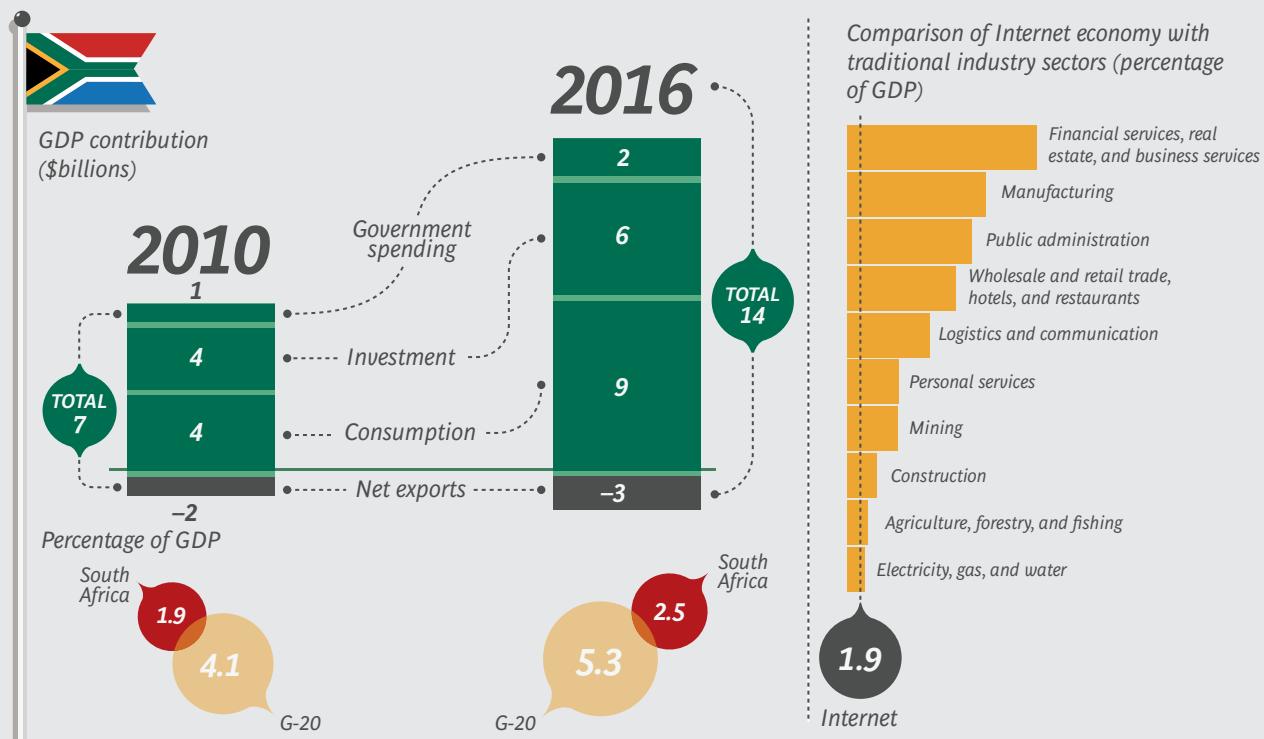
Note: Some columns may not add up to total contributions due to rounding.

The Internet's Impact on Commerce in Saudi Arabia



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); CCB; Saudi Arabia Central Department of Statistics and Information; Arab Advisors Group; Pyramid Research; IEMR; company reports; World Bank; BCG analysis.

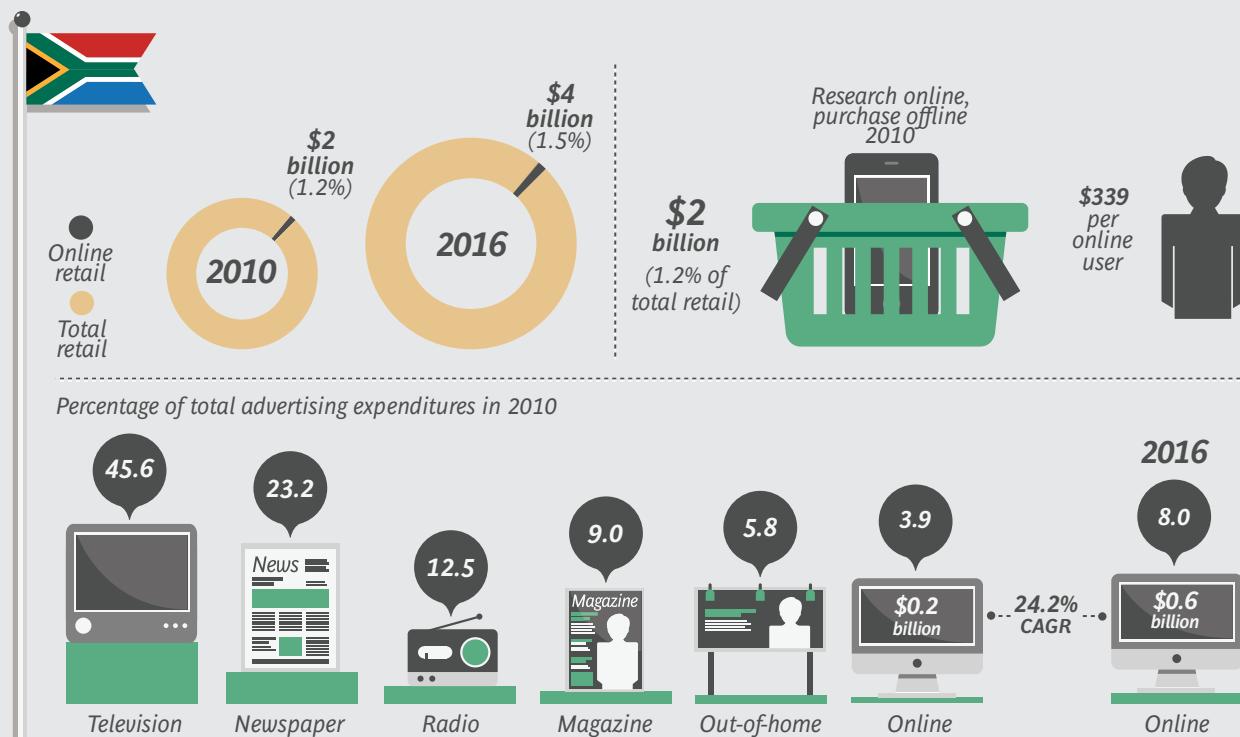
South Africa's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Statistics South Africa; IEMR; Pyramid Research; World Wide Worx; company reports; World Bank; World Trade Organization; BCG analysis.

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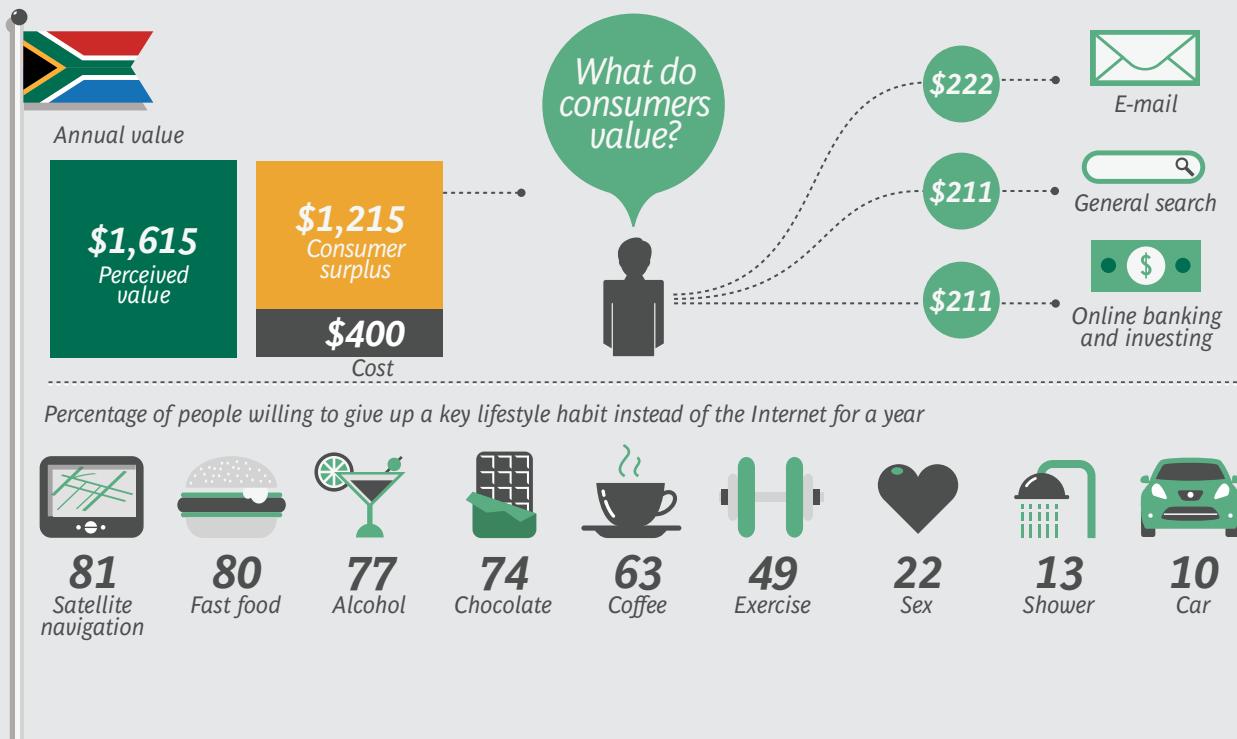
The Internet's Impact on Commerce in South Africa



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Statistics South Africa; IEMR; Pyramid Research; World Wide Worx; company reports; World Bank; World Trade Organization; BCG analysis.

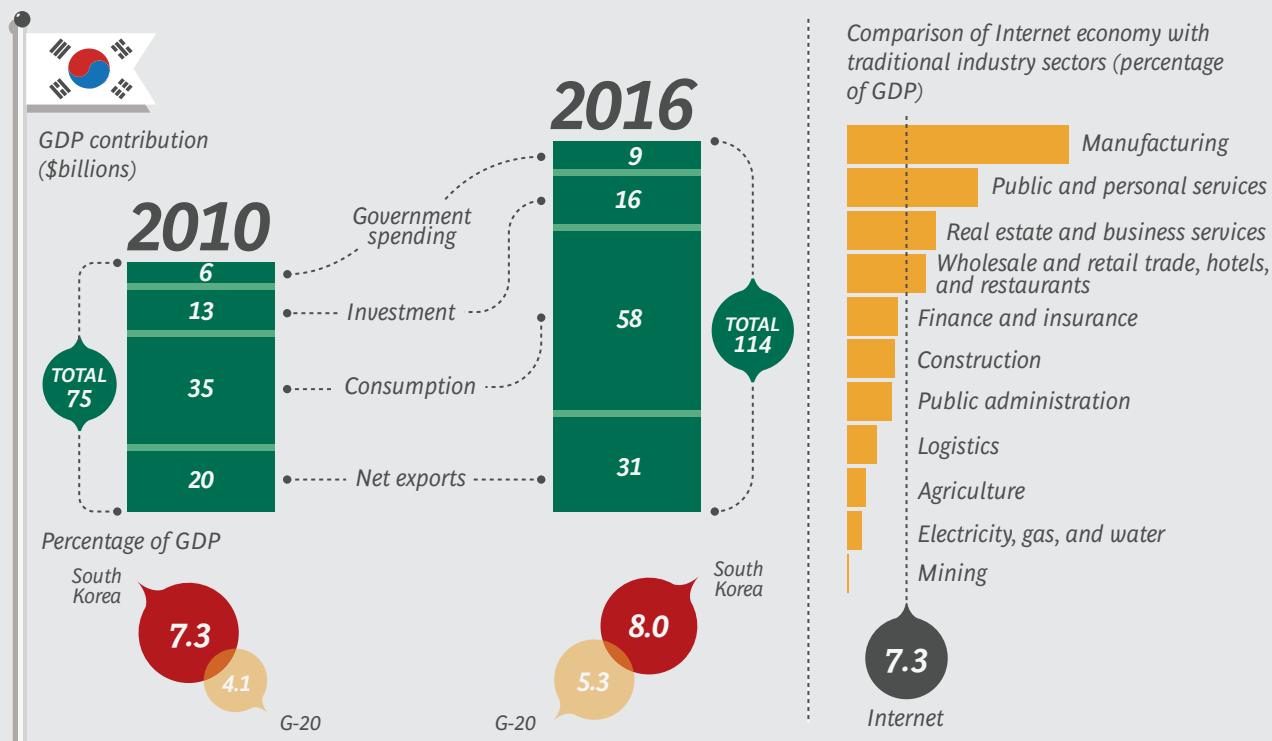
Note: Percentages may not total 100 due to rounding.

South Africa's Consumers Benefit from the Internet



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Statistics South Africa; IEMR; Pyramid Research; World Wide Worx; company reports; World Bank; World Trade Organization; BCG analysis.

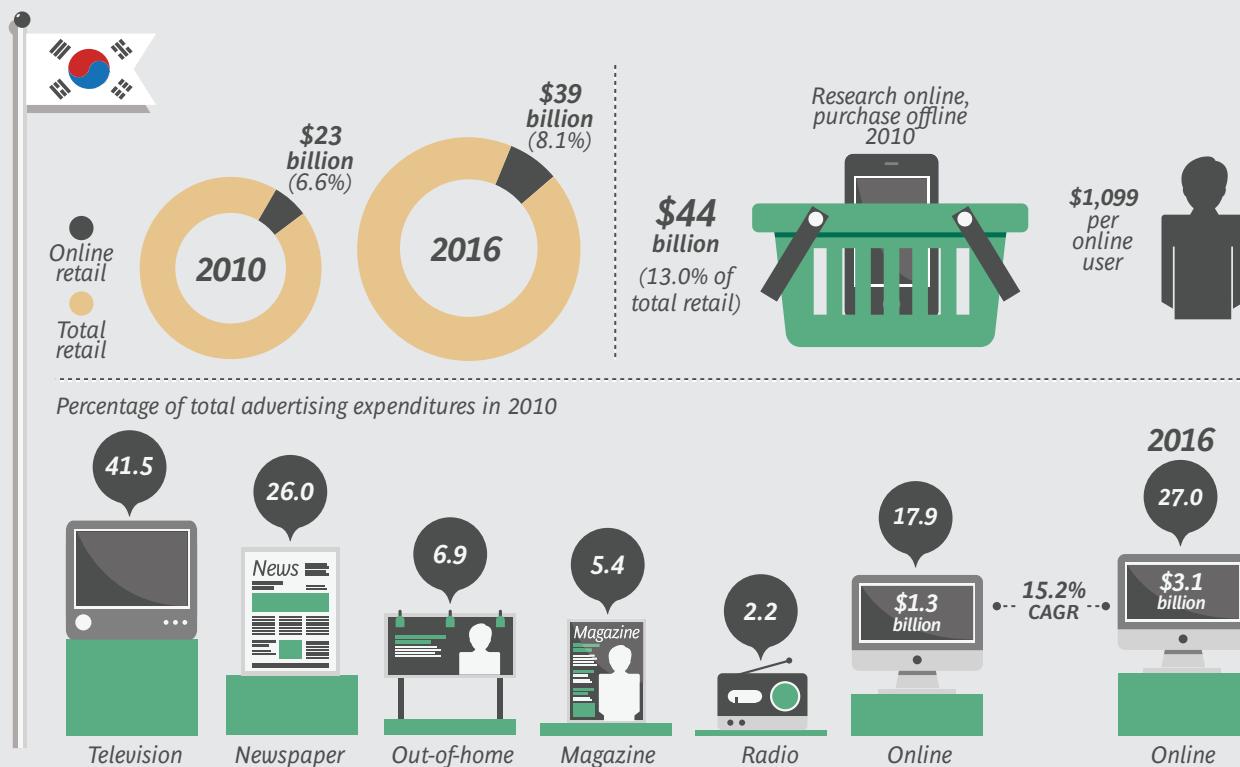
South Korea's Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Korea National Statistics Office; IE Market Research; Bank of Korea; Korea Internet Security Agency (KISA); company reports; BCG analysis.

Note: Some columns may not add up to total contributions due to rounding.

The Internet's Impact on Commerce in South Korea



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Korea National Statistics Office; IE Market Research; Bank of Korea; Korea Internet Security Agency (KISA); company reports; BCG analysis.

Note: Percentages may not total 100 due to rounding.

South Korea's Consumers Benefit from the Internet

Annual value



What do consumers value?



Percentage of people willing to give up a key lifestyle habit instead of the Internet for a year



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Korea National Statistics Office; IE Market Research; Bank of Korea; Korea Internet Security Agency (KISA); company reports; BCG analysis.

Note: Due to rounding, perceived value does not total consumer surplus plus cost.

The Internet's Impact on Small and Medium Enterprises (SMEs) in South Korea



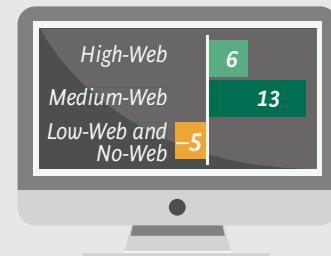
SMEs' percentage of private-sector employment

51

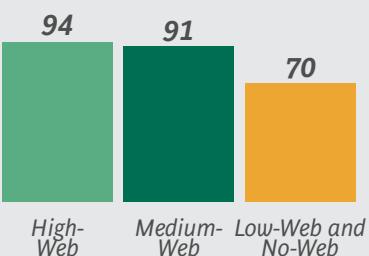
88

SMEs' percentage of gross industrial output

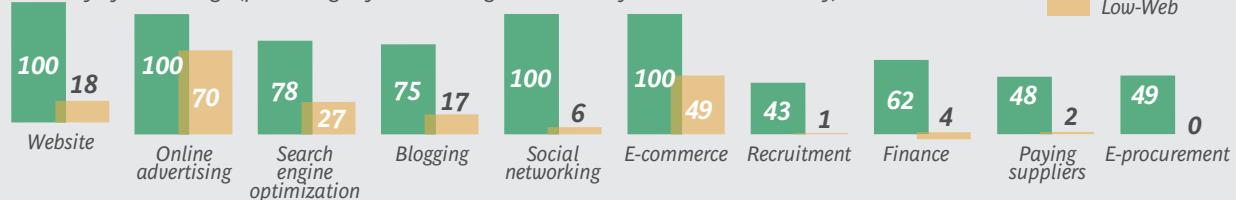
Historical three-year sales growth of SMEs (percentage)¹



Percentage of SMEs that added jobs during the last three years¹



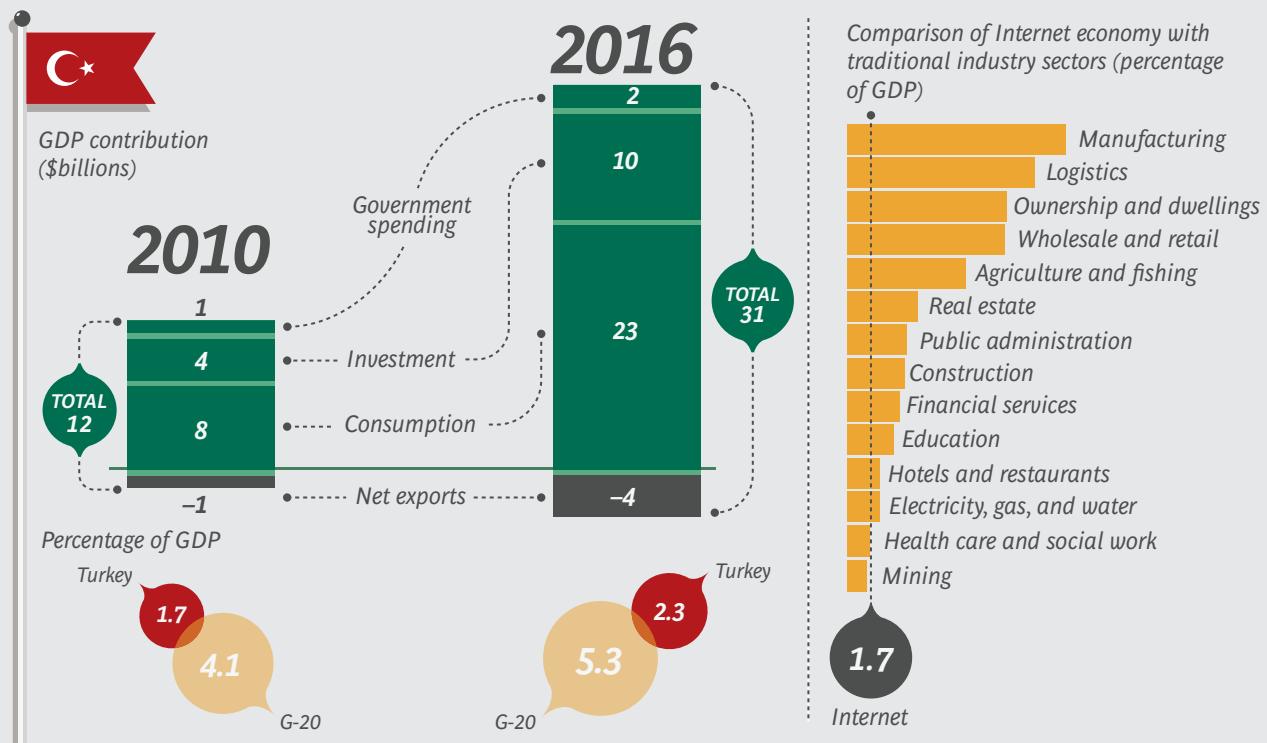
Intensity of Web usage (percentage of SMEs using the Internet for a business activity)



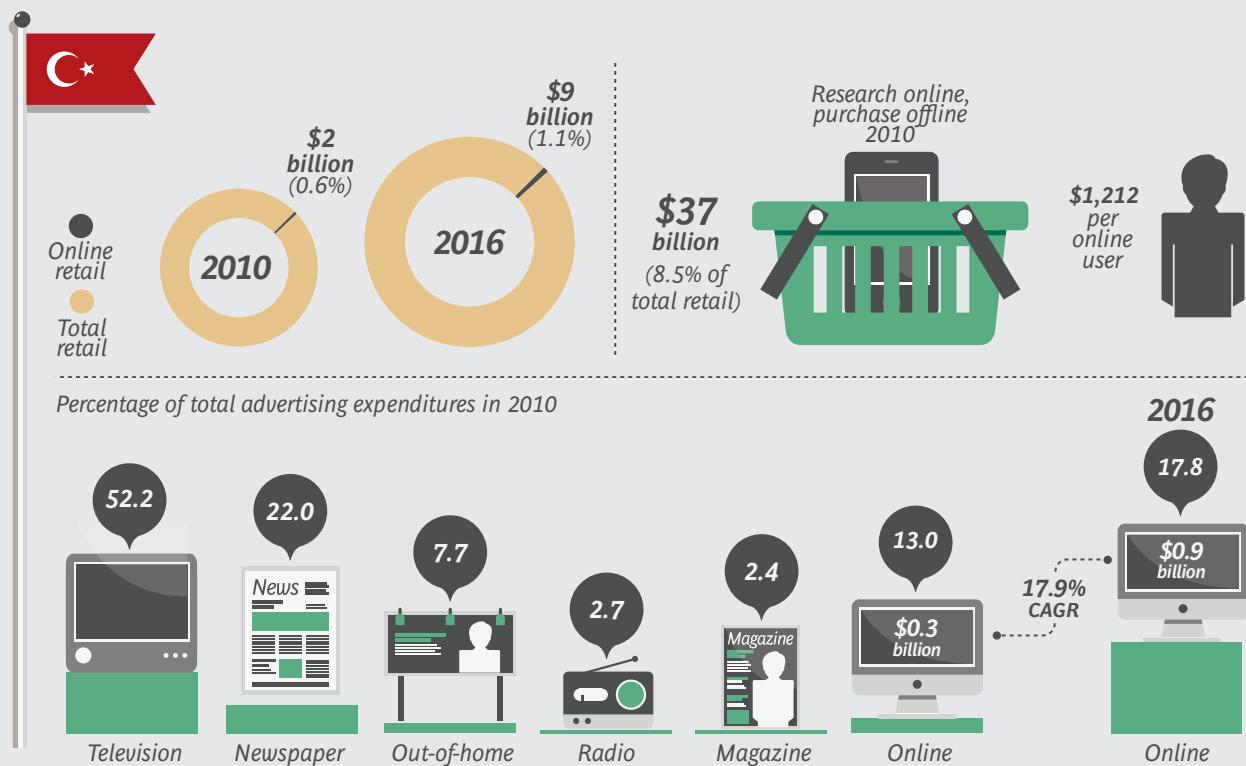
Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Korea National Statistics Office; IE Market Research; Bank of Korea; Korea Internet Security Agency (KISA); company reports; BCG analysis.

¹High-Web companies use a wide range of Internet tools to market, sell, and support customers, interact with suppliers, and empower employees; medium-Web businesses market or sell goods or services online; low-Web businesses have a website or a social-networking site; no-Web businesses do not have a website.

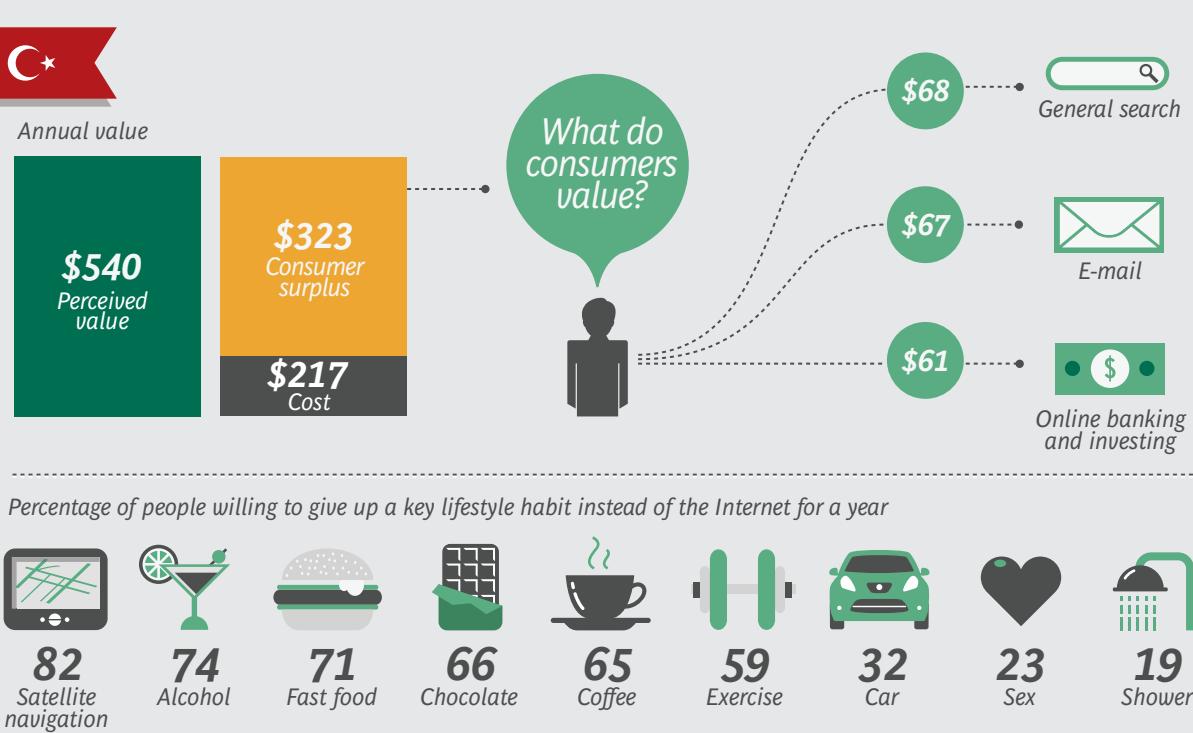
Turkey's Internet Economy



The Internet's Impact on Commerce in Turkey

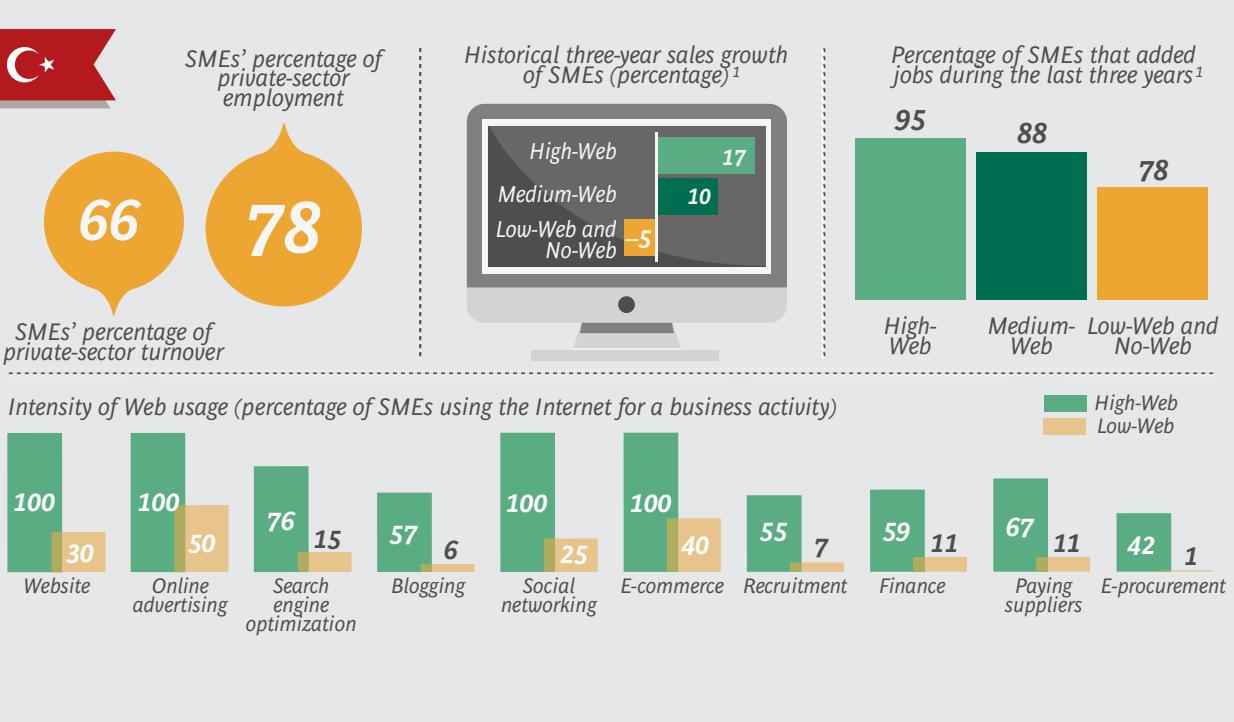


Turkey's Consumers Benefit from the Internet



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Turkish Statistical Institute; Turkish Telecommunication Authority; World Economic Forum; BCG analysis.

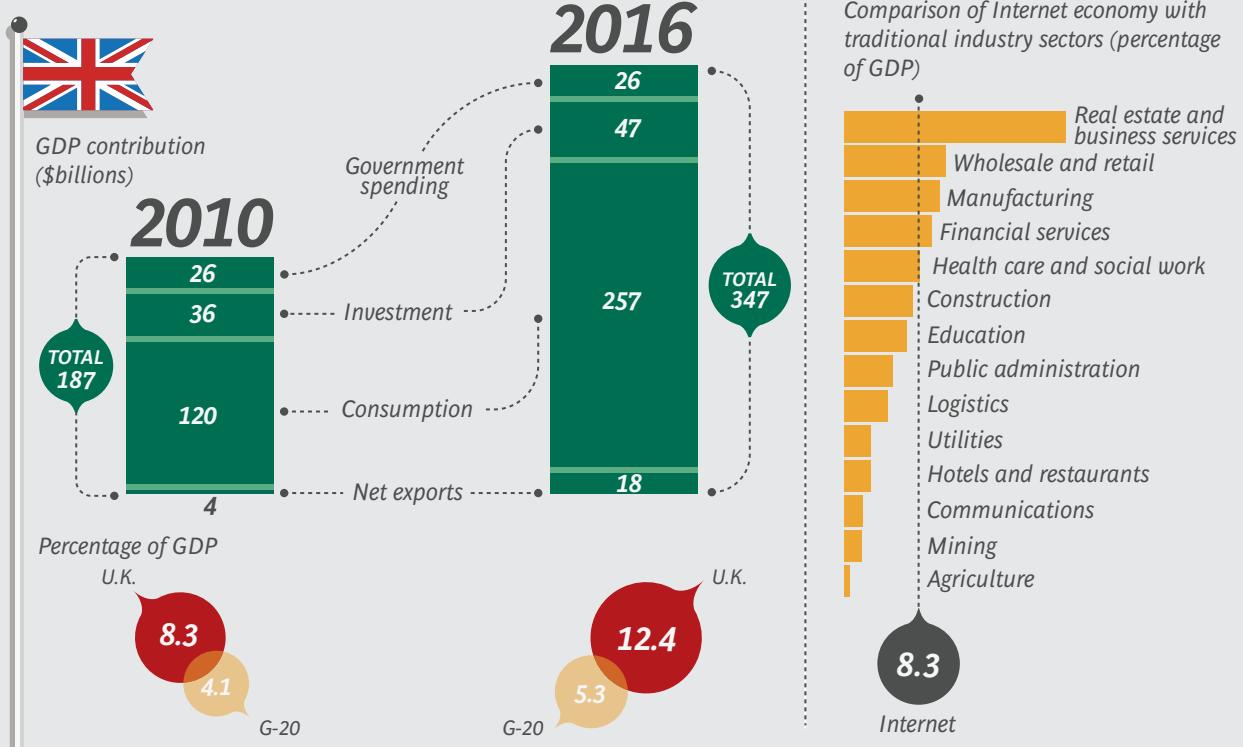
The Internet's Impact on Small and Medium Enterprises (SMEs) in Turkey



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; Turkish Statistical Institute; Turkish Telecommunication Authority; World Economic Forum; BCG analysis.

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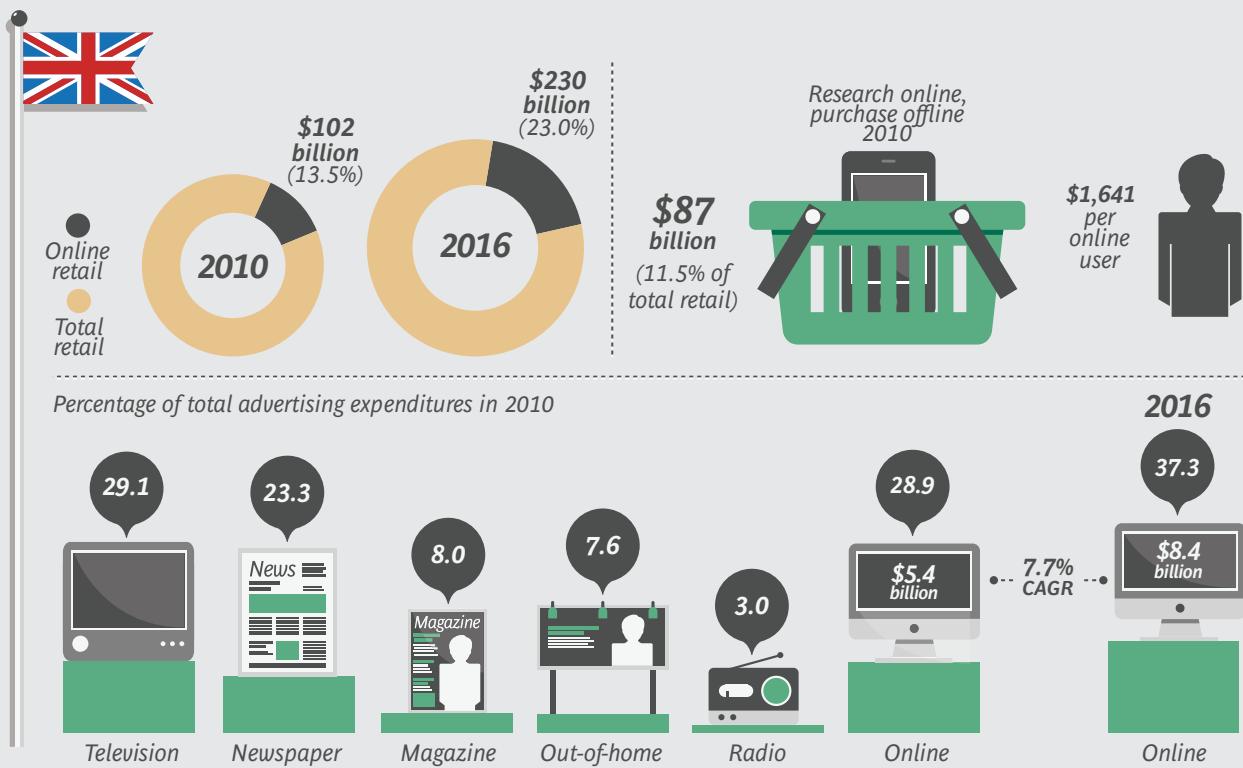
The U.K. Internet Economy



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Eurostat; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; U.K. Office for National Statistics (ONS); H2; IMRG; IDC; GfK; IE Market Research; BCG analysis.

Note: Some columns may not add up to total contributions due to rounding.

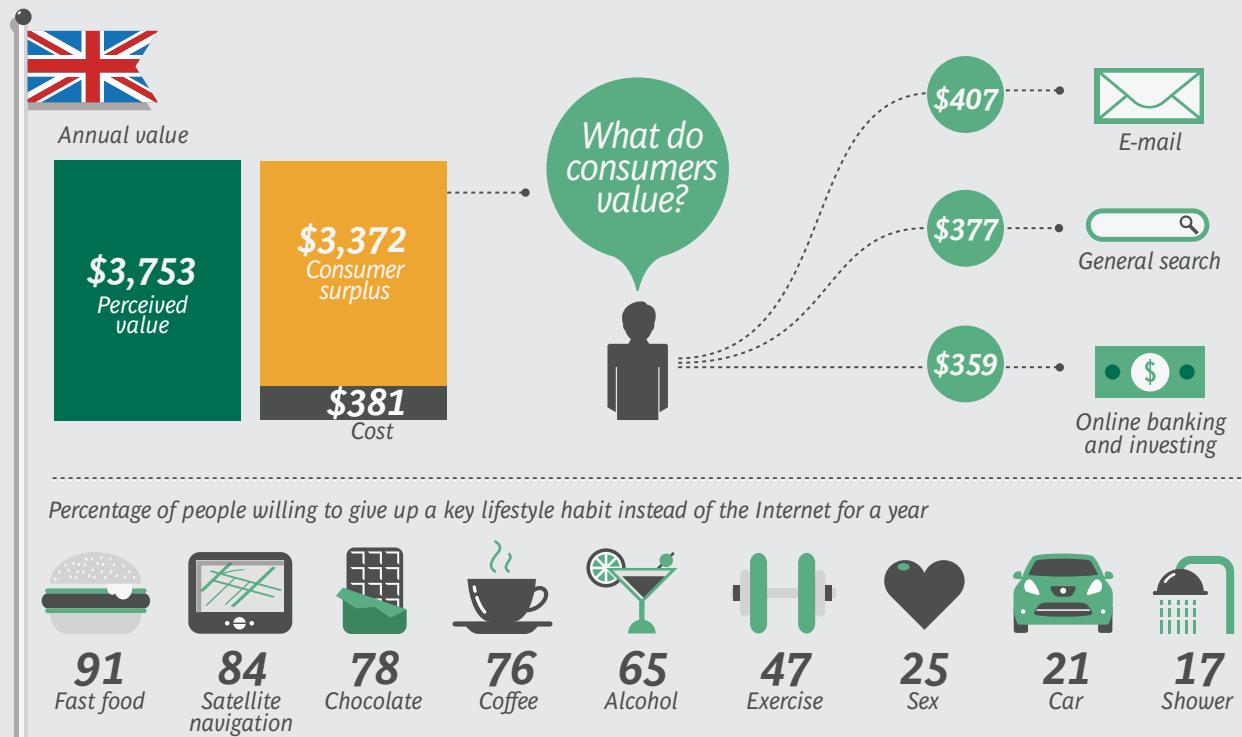
The Internet's Impact on Commerce in the U.K.



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Eurostat; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; U.K. Office for National Statistics (ONS); H2; IMRG; IDC; GfK; IE Market Research; BCG analysis.

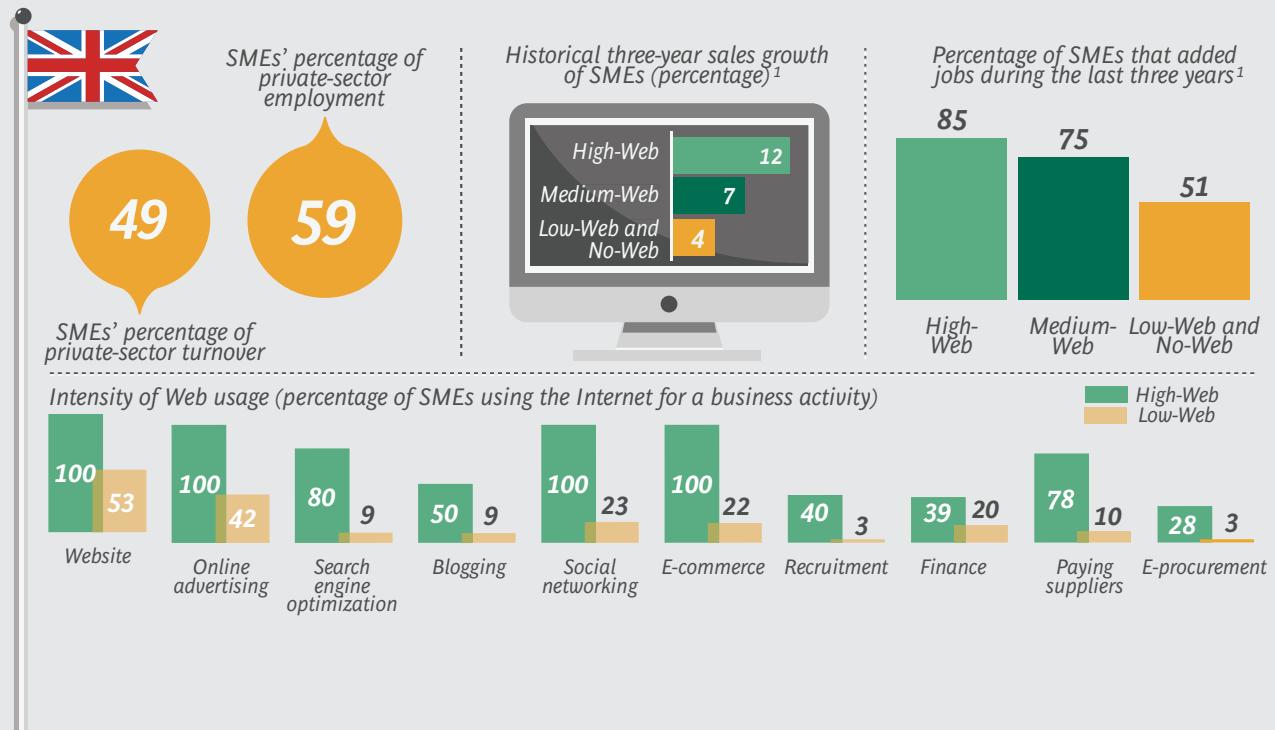
Note: Percentages may not total 100 due to rounding.

U.K. Consumers Benefit from the Internet



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Eurostat; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; U.K. Office for National Statistics (ONS); H2; IMRG; IDC; GfK; IE Market Research; BCG analysis.

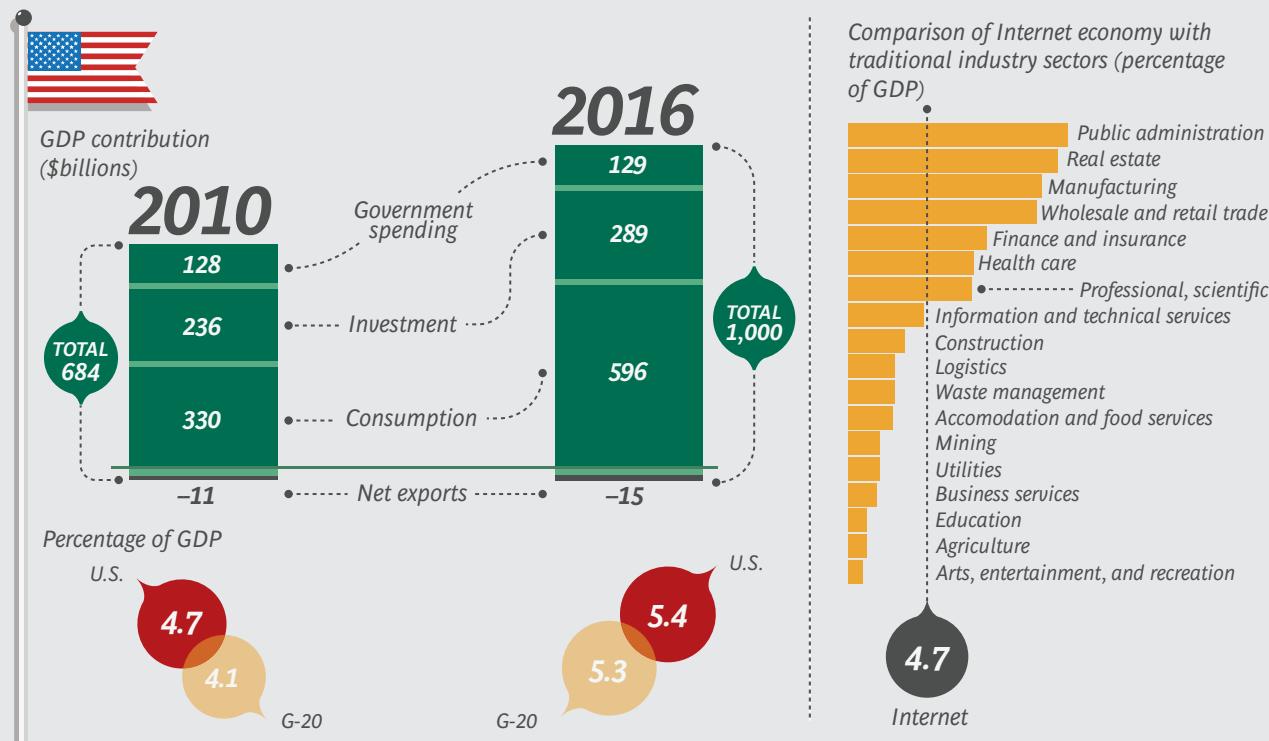
The Internet's Impact on Small and Medium Enterprises (SMEs) in the U.K.



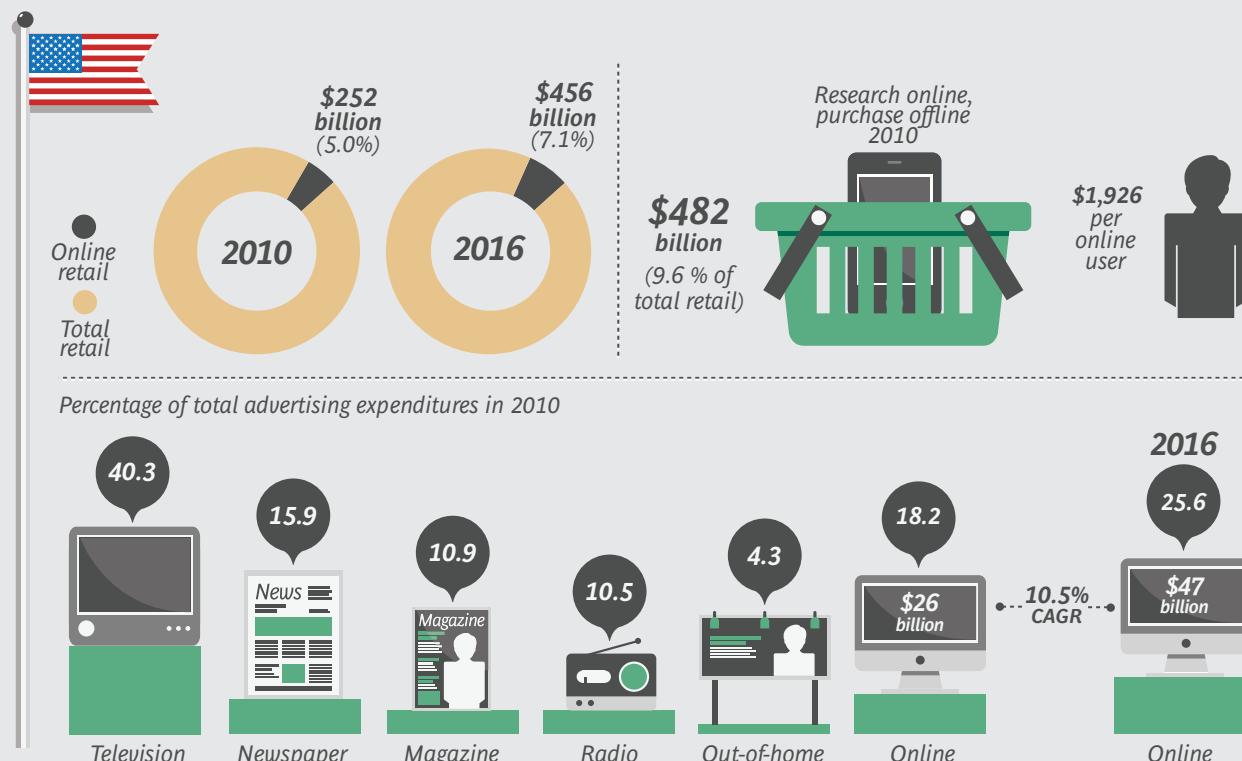
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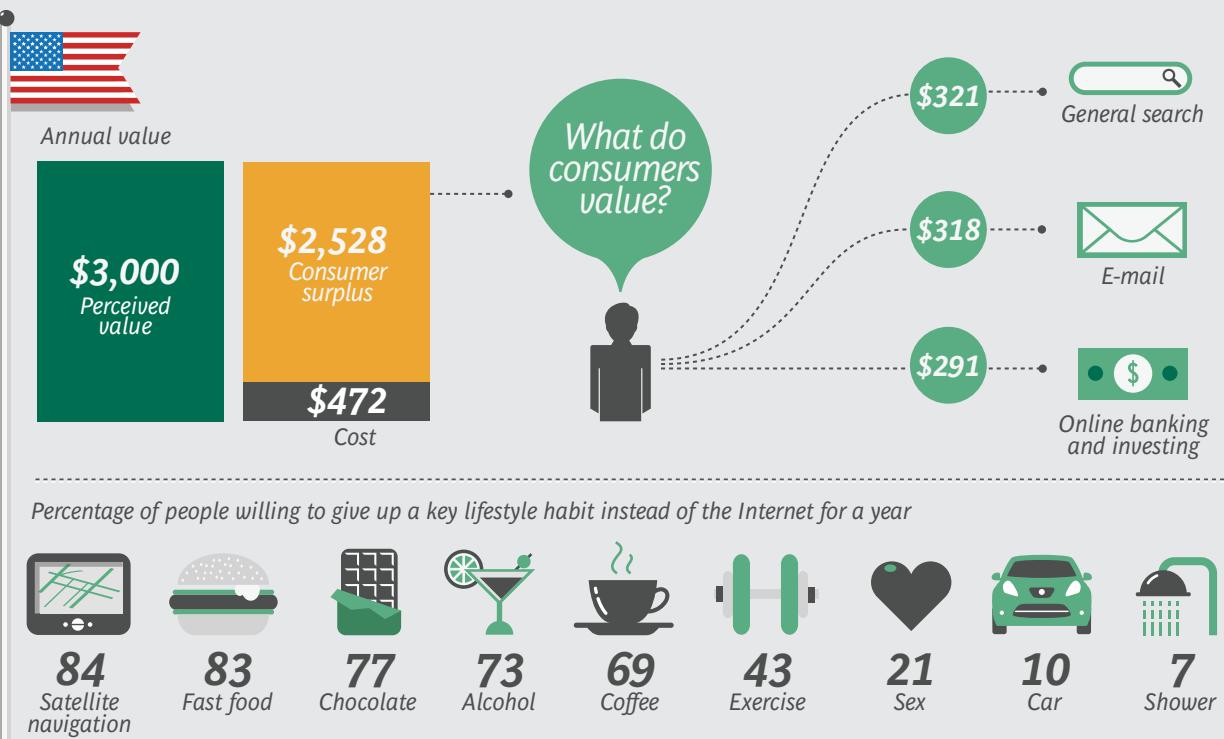
The U.S. Internet Economy



The Internet's Impact on Commerce in the U.S.

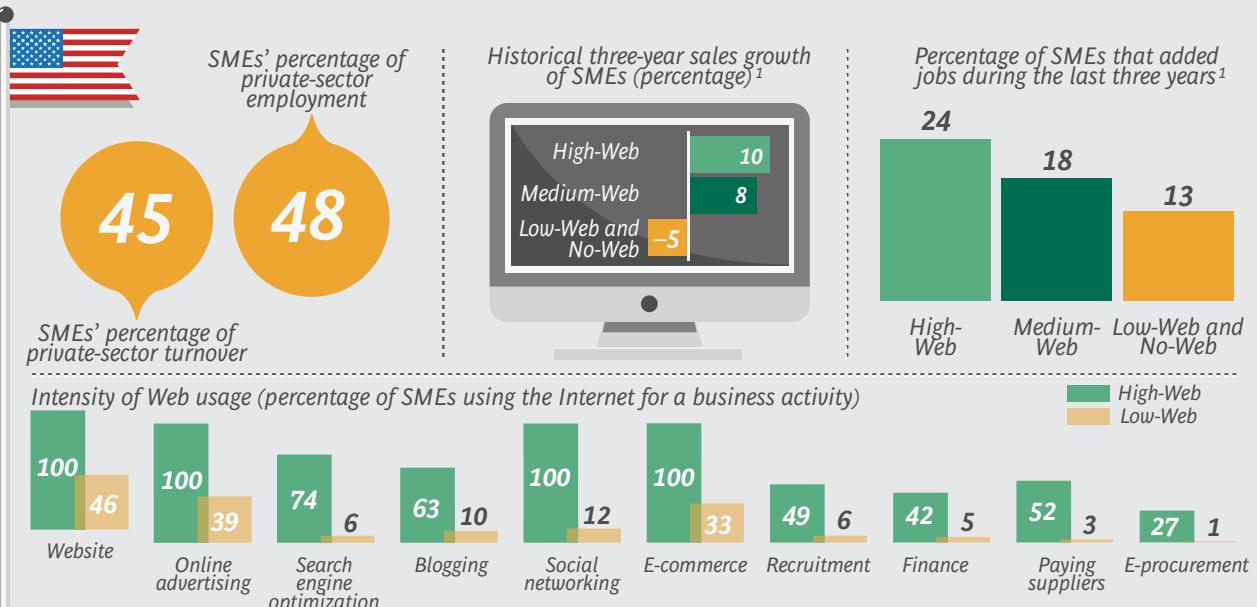


U.S. Consumers Benefit from the Internet



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; U.S. Bureau of Labor Statistics; U.S. Small Business Administration; PC; Forrester Research; H2; Fitch; World Economic Forum; BCG analysis.

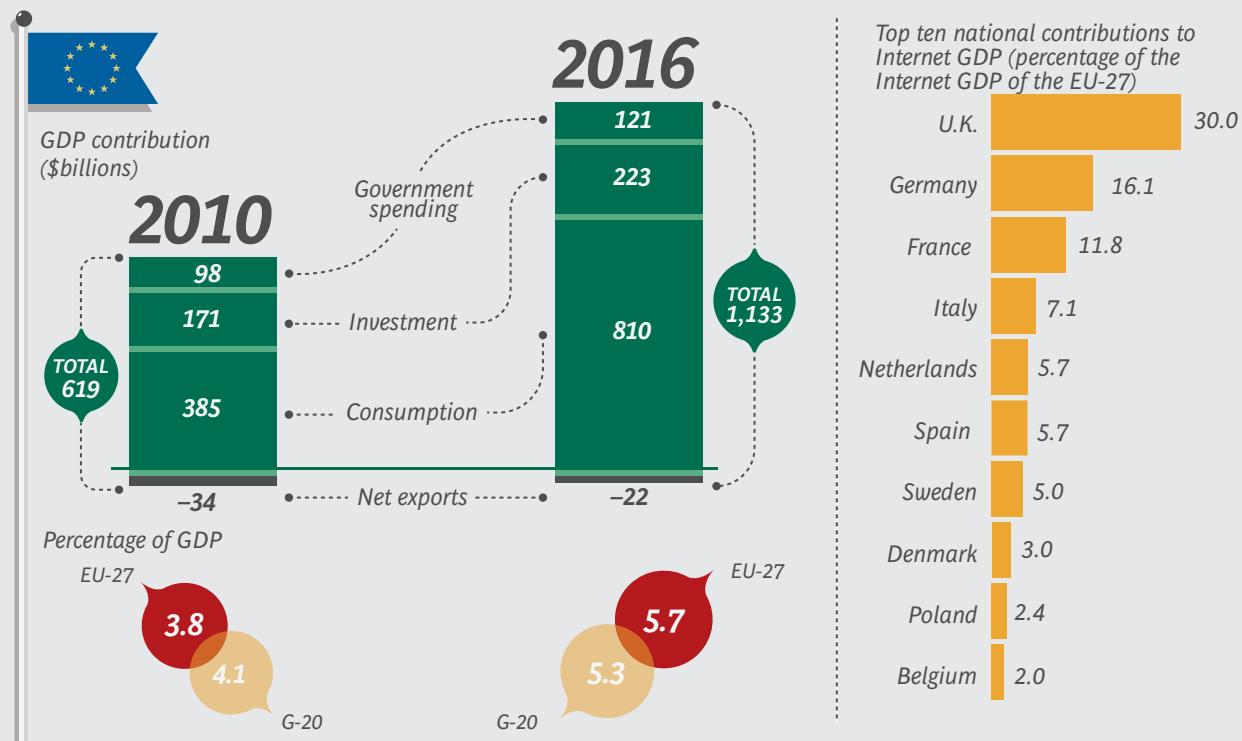
The Internet's Impact on Small and Medium Enterprises (SMEs) in the U.S.



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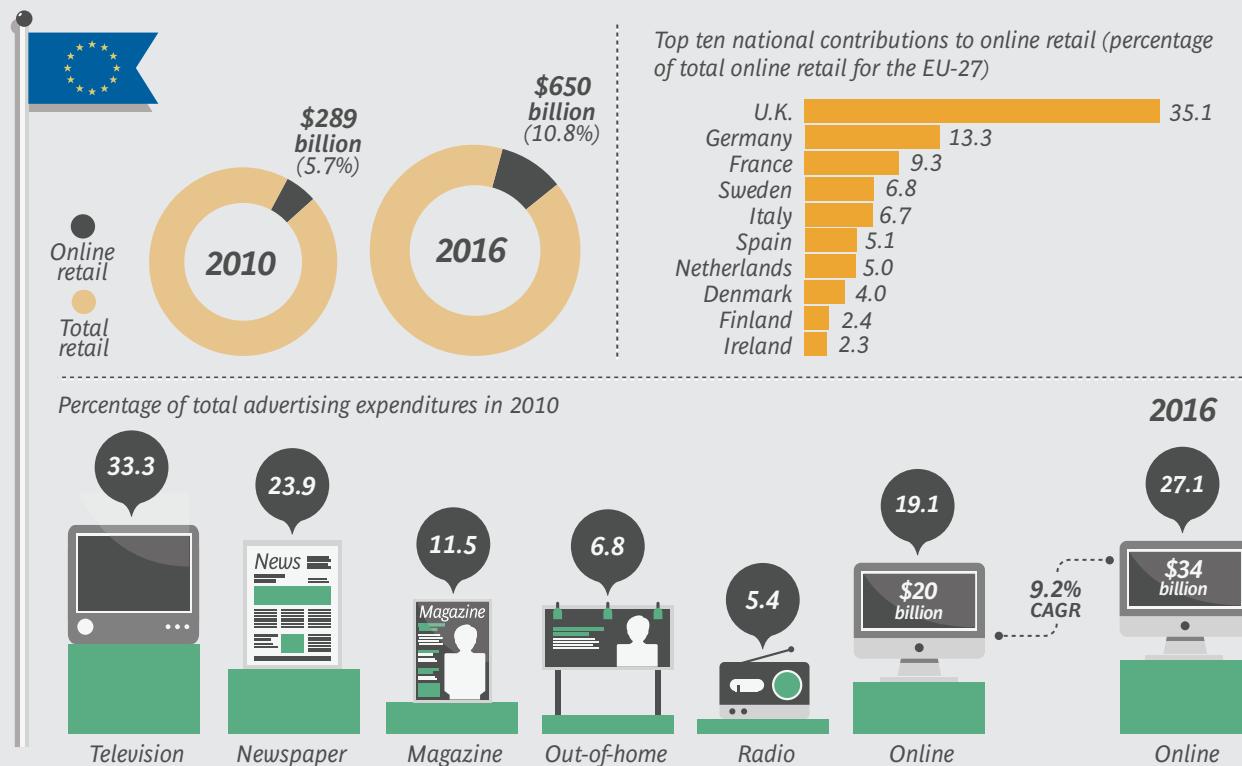
The Internet Economy in the EU-27



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; BCG analysis.

Note: Some columns may not add up to total contributions due to rounding.

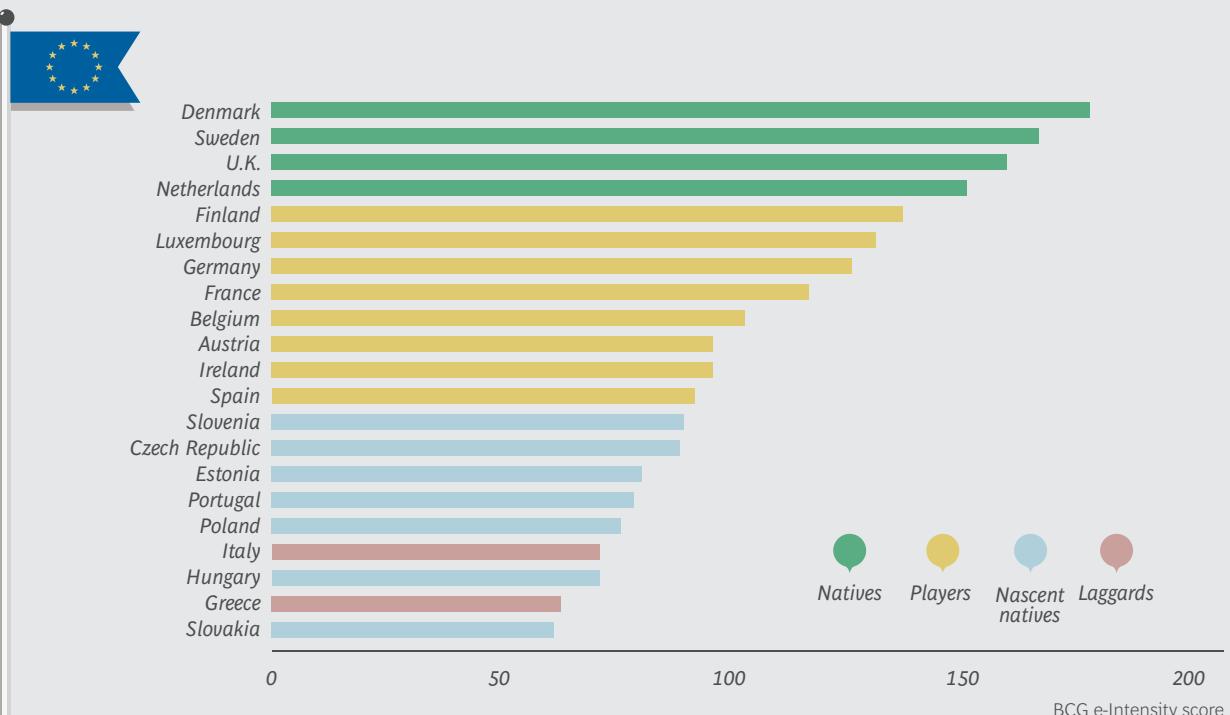
The Internet's Impact on Commerce in the EU-27



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; BCG analysis.

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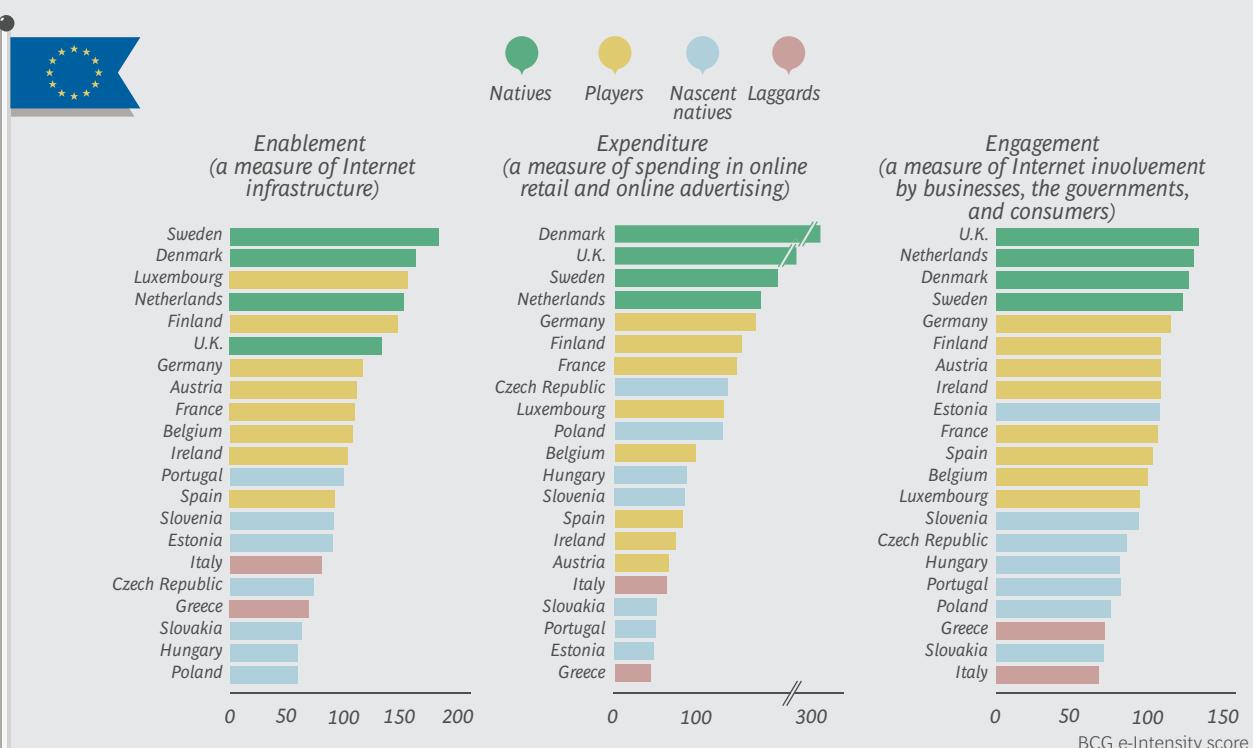
BCG's e-Intensity Index Highlights Internet Prowess Across the EU-27 Economies



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; BCG analysis.

Note: The index is scaled so that the geometric mean is 100 for the 34 OECD member countries. The scores of several countries were derived due to lack of complete data. The categories of Internet intensity—nascent natives, natives, players, and laggards—are illustrated in Exhibit 3 of this report. Graph excludes Bulgaria, Cyprus, Latvia, Lithuania, Malta, and Romania.

How the EU-27 Economies Stack Up on the Components of BCG's e-Intensity Index



Sources: Economist Intelligence Unit; Ovum; Gartner; Euromonitor International; Organisation for Economic Co-operation and Development (OECD); Magnaglobal; CCB; BCG analysis.

Note: The indices were scaled so that the geometric mean is 100 for the 34 OECD members. The scores of several countries were derived due to lack of complete data. Graph excludes Bulgaria, Cyprus, Latvia, Lithuania, Malta, and Romania.