

5.3.3 Country profile – Germany



With a rise in performance of two index points over the previous year, Germany achieved 67 index points in the overall benchmark. This performance placed it in the middle of the range, sharing seventh place with Norway. Germany improved its position in 2008, rising from ninth to seventh place. This was largely due to achieving world leadership for the first time in the key performance indicator “e-Procurement – purchases by companies via the Internet”.

Market development – 5th place →

With an average performance of 46 index points in the national average index, Germany shared fifth place with the Netherlands. Germany's development remained static in six of the eight key indicators examined in this report. It was well above average in only one key indicator, “ICT expenditure per inhabitant”, with 72 points.

Infrastructure – 8th place ↑

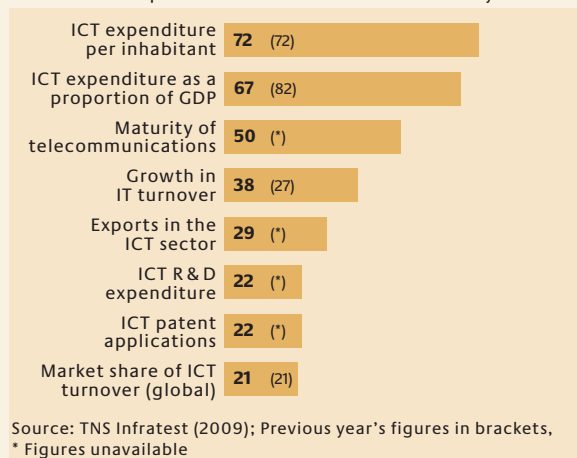
Germany improved its performance, gaining five index points to reach an index value of 79 and 8th place in the overall ranking, just behind the USA. Germany is making headway in all infrastructure categories except “SSL server penetration”. The greatest improvement was in the provision of broadband connections, where Germany's performance rose by eleven index points to 77. Germany's performance also improved in the provision of mobile phone connections, where it gained eight points.

Applications – 4th place ↑

Germany's average national index improved by three index points, rising to an index value of 86. This represented an improvement in Germany's ranking from seventh to fourth place. In particular, its performance in “Use of social networks” rose by almost twenty percent to 67.3 percent, a gain of 16 index points. In the category “Internet use in the population” its rise to 76 percent represented an improvement of more than 3.5 percent. Germany achieved world leadership for the first time in “Purchases by companies via the Internet”.

Fig. 5.3.3a: Significance of the German ICT market as of 2008

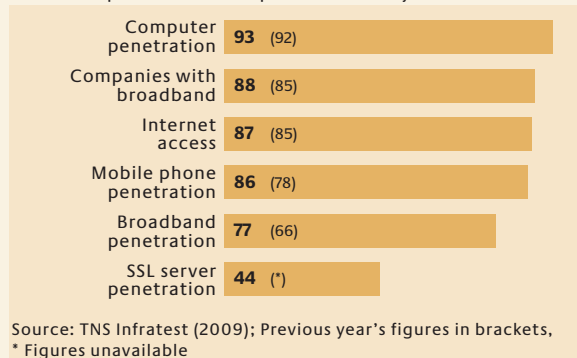
Positive development in “Growth in IT turnover” only



Source: TNS Infratest (2009); Previous year's figures in brackets, * Figures unavailable

Fig. 5.3.3b: State of development of Germany's infrastructure as of 2008

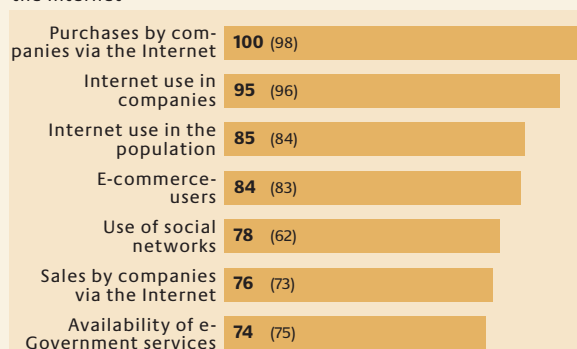
SSL server penetration still poor in Germany



Source: TNS Infratest (2009); Previous year's figures in brackets, * Figures unavailable

Fig. 5.3.3c: Maturity of the German applications sector as of 2008

Germany set the benchmark in “Purchases by companies via the Internet”



Source: TNS Infratest (2009); Previous year's figures in brackets