

Foreword

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In 2001, when the World Economic Forum first published *The Global Information and Technology Report (GITR)*, the dot-com bubble had just burst; there were fewer than 20 million mobile phone users in all of Africa; and Apple Inc.'s product line was confined to Macintosh computers. That *Report* presented an optimistic view of the future, highlighting the transformational potential of information and communication technologies (ICT) in advancing the progress of global society and business. In the decade that followed, Booz & Company has witnessed firsthand the realization of that potential in its work with clients and communities worldwide and through its long-standing involvement with the GITR. Today there are more than 500 million mobile phone subscribers in Africa, and Apple is the world's largest company in market capitalization, producing iPhones, iPods, and iPads along with Mac computers. Despite the strides the sector has made since the technology bust in 2001, however, we believe we are only just beginning to feel the impact of digitization—the mass adoption by consumers, businesses, and governments of smart and connected ICT.

Success in the digitization world—where competitors from Shenzhen to Schengen can emerge seemingly overnight—requires policymakers and business leaders to go back to the drawing board to identify and build “right-to-win” capabilities in their spheres of influence. Digitization is more than a matter of access. Our recent research shows that digitization *multiplies* the impact of connectivity, creating substantial incremental value in terms not only of job creation and economic growth, but also of societal well-being and government transparency. Today, more than 70 percent of the world's citizens live in societies that have just begun their digitization journeys. As the individuals and enterprises in these societies continue to progress in developing their own digitization capabilities, they will only increase and accelerate these economic and social benefits.

The primary beneficiaries will be those who adapt their legacy capabilities and assets and fully exploit the potential of these new ICT technologies. Policymakers, who for years focused on ensuring affordable access to networks, now need to adopt a broader ecosystem perspective to shape and implement their national digitization agendas. Enterprises across sectors need to reassess the models that enable them to continue growing

or even to stay in business, given the emergence of nimble digital competitors. Individuals need to reassess the skills they need to cultivate if they are to thrive in an environment of global labor pools and tenuous competitive advantage.

At Booz & Company, we believe in the power and potential of digitization to help solve the economic and societal challenges of tomorrow. Digitization enables people with good ideas to efficiently and effectively connect and learn from each other's successes and failures in building scalable solutions and enduring capabilities. We are honored to contribute to *The Global Information Technology Report 2012* and look forward to helping policymakers and business leaders realize the promise of ICT captured in these pages.