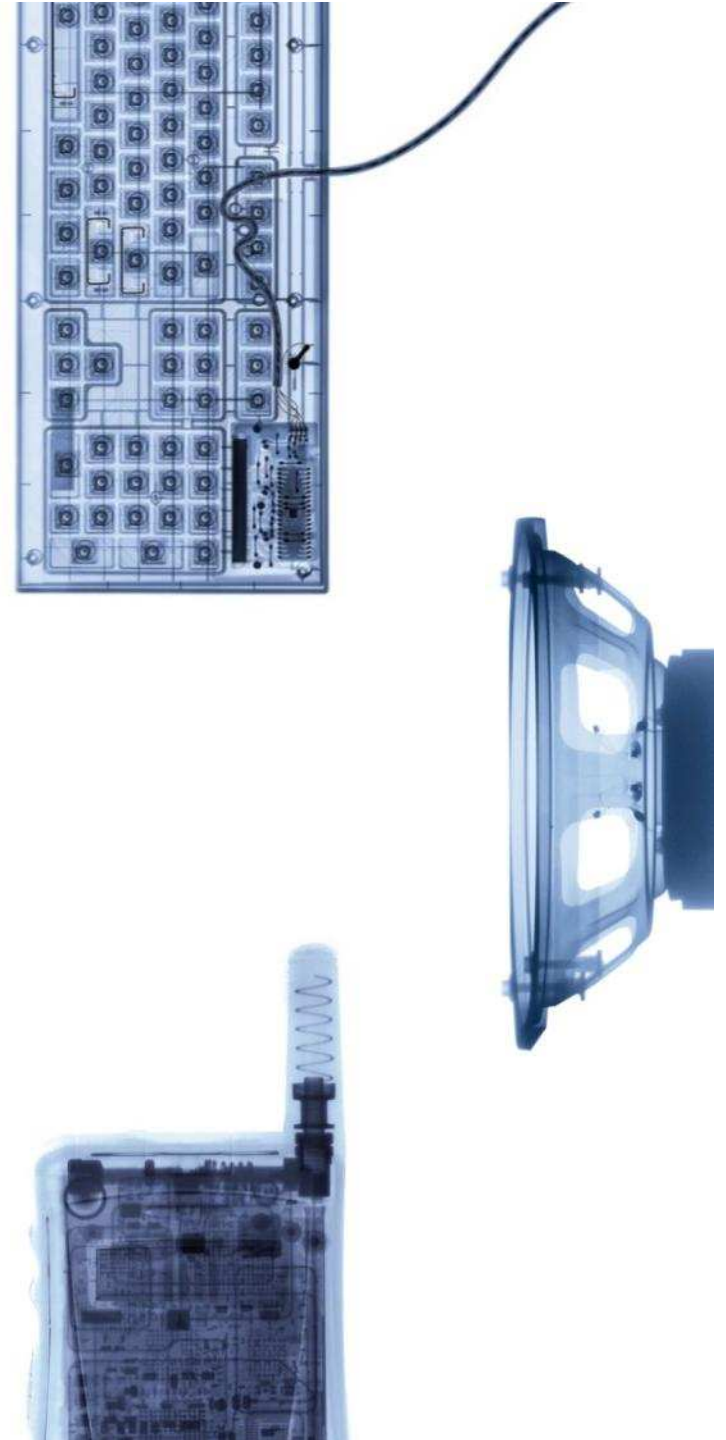


Deloitte.

2009 TMT Predictions scorecard



2009 Predictions scorecard

Technology

- Making every electron count: the rise of the SmartGrid
- Gadgets for free!* (*subject to contract)
- Disrupting the PC: the rise of the netbook
- Moore's Law and risk
- The common sense of lean and green IT
- Downsizing the digital attic
- Generic becomes the "it" brand
- The digital ambulance chaser gets supercharged
- Social networks in the enterprise: Facebook for the Fortune 500
- Sinners become saints

Legend

○○○○○
Didn't come true
as we predicted

●●●○○
Came true, but less than
we predicted. At least so far

●●●●●
Came true exactly as
much as we predicted

2009 Predictions scorecard

Media

- Getting print out of peril may require stopping the presses
- Television rediscovers its self-belief
- 3D become an obligation, not an option, at the movies
- The rising cost of free online content
- Rising stars take on megastars
- Good morning, good afternoon and good evening, listeners: the dawn of Wi-Fi radio
- Mobile advertising finds its meaning
- The markets get anti-social with social networks
- Reinventing mobile television
- The rise of malverts and their threat to brands

Legend

○○○○○○
Didn't come true
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Came true, but less than
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2009 Predictions scorecard

Telecommunications

- Smart phones: how to stay clever in a downturn
- Data ascends from the basement to the boardroom
- Digital communication loses its message
- The joys of disintermediation: why operators should embrace the application store
- Integration finally unleashes mobile phone convergence
- Farewell mobile phone; welcome wireless device
- The mobile broadband accident in slow motion
- The third screen goes dark: mobile television loses its reception
- One for all and all for one: fibre networks change the shape of competition
- Mobile termination rates in Europe: a cut too far or a cut too fast?

Legend

○○○○○
Didn't come true
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