

# INFORMATION COMMUNICATION TECHNOLOGY (ICT)

## THE GLOBAL CENTER OF ICT

Greater Seattle is the world's premier hub for ICT. We are home to some of the most recognizable global brands including **Microsoft, Amazon, Expedia, Cray** and **Tableau**. These ICT giants are joined by more than 14,000 ICT companies employing nearly 200,000 high-tech workers. This talented workforce continues to push the boundaries of software engineering, cloud computing and game development as well as emerging technologies such as artificial intelligence (AI), virtual reality and augmented reality (AR/VR), machine learning and blockchain.

## FASTEST GROWING ICT EXPORTING MARKET

### NEW FRONTIERS

The Greater Seattle region's ICT prowess has positioned it as **one of the most dynamic centers for AI and AR/VR in the world**. Companies and institutes in this space include the Allen Institute, the University of Washington's Reality Lab, Pixvana, Pluto and VRStudios. Facebook also announced plans to expand its existing presence by opening a new AI lab in Seattle.

### METROS WITH THE MOST HIGH-TECH JOBS IN THE US

RANK	METRO	HIGH-TECH JOBS
1	San Jose, Sunnyvale-Santa Clara, CA	31.2%
2	Seattle-Tacoma-Bellevue, WA	15.8%
3	Detroit-Warren-Dearborn, MI	15.5%
4	San Francisco-Oakland-Hayward, CA	15.3%
5	Wichita, KS	15.2%

Source: 24/7 Wall St. (2017)

**SAMPLE OF TECH COMPANIES SETTING UP NEW OFFICES IN GREATER SEATTLE**

AS OF 2016

- Airbnb (2016) – Travel
- Arm (2017) - AI & IoT
- Baidu (2017) - AI, cloud, consumer internet
- Carbonite (2017) - Cloud
- Puppet (2017) - Cloud
- Huawei (2016) - Cloud, mobile
- Mercedes Benz (2017) - Analytics, automotive, cloud
- Magic Leap (2016) – VR
- Pinterest (2016) - Social network
- Salesforce (2017) - Cloud, enterprise software
- Tencent (2017) – AI, mobile



**Cloud City**

The Greater Seattle region is the global epicenter for cloud computing. This is in large part due to the presence of two of the industry’s biggest players, Amazon and Microsoft, which have helped propagate a startup ecosystem built around Amazon Web Services (AWS) and Microsoft’s Azure platform. Foreign and domestic companies including Google, Alibaba, Cisco, Facebook and Oracle have all located engineering offices in the region to take advantage of our talent.

The region boasts expertise in multiple areas: servers and infrastructure; cloud-based software and services; backup and recovery services; security and more.

Companies with cloud expertise that are headquartered in the region include:

- |                   |            |
|-------------------|------------|
| Amazon            | Icertis    |
| CenturyLink Cloud | Microsoft  |
| Chef              | Outreach   |
| Concur            | Skytap     |
| F5 Networks       | Smartsheet |

**INDUSTRY PROFILE**

**GLOBAL LEADER IN INTERACTIVE ENTERTAINMENT**

Greater Seattle is home to one of the top game development centers in the world, featuring **over 400 interactive media companies** such as Nintendo, Oculus, PopCap, Valve, Big Fish Games and Bungie. According to Washington Interactive Network (WIN), the sector generated **over \$28 billion in revenue** in 2015.

Microsoft’s **Xbox** is one of the most successful video gaming brands of all time, and **Amazon** is jumping into the competition by creating in-house games from its own studio.

Twelve universities and colleges in King County offer gaming curriculum including the **DigiPen Institute of Technology**, a global leader in game development education. The region also hosts one of the largest gaming expos for the industry, the Penny Arcade Expo.

**Greater Seattle has the highest per capita share of technology-dependent jobs among all the states in the U.S.**



## TOP 10 MOST INNOVATIVE U.S. STATES

	Total Score	R&D Intensity	High-Tech Density	Patent Activity
1. MASSACHUSETTS	93.33	2	1	2
2. CALIFORNIA	93.30	4	2	1
3. WASHINGTON	90.40	5	7	3
4. NEW JERSEY	80.42	10	5	7
5. CONNECTICUT	77.18	8	22	11
6. OREGON	77.08	13	17	12
7. MARYLAND	76.82	3	24	25
8. COLORADO	75.12	19	15	10
9. DELAWARE	72.72	6	30	25
10. MINNESOTA	71.85	16	10	4

Source: Bloomberg.com – Top 20 Most Innovative States (2016)

## LEADING STARTUP ECOSYSTEM

Greater Seattle is one of the leading startup hubs in the world, thanks to a diverse ecosystem of colleges and research universities, accelerators, incubators, investors and industry organizations.

- University of Washington
- Seattle Interactive
- RAIN Accelerator
- Conference
- TechStars
- Startup Weekend
- Geekwire Meetup
- Surf Incubator
- Madrona Venture Group
- 9Mile Labs
- Tech Alliance
- Intellectual Ventures
- Founder's Co-op
- Alliance of Angels
- ThinkSpace
- Element 8
- WINGS (med tech angel investment)
- Montlake Capital
- DigiPen University
- WTIA Startup Club

## WASHINGTON STATE ICT SNAPSHOT

- Nearly 200,000 ICT jobs
- 14,000 ICT companies
- #2 in the U.S. for exports of tech services
- Second highest concentration of ICT workers in the U.S.

Sources: Washington State Department of Commerce  
CompTia, March 27, 2018



## TALENT

- Highest concentration of software developers for apps
- 2<sup>nd</sup> highest concentration of web developers
- 2<sup>nd</sup> highest concentration of computer network architects

Source: Bureau of Labor Statistics 2017

## EXAMPLES OF FOREIGN-OWNED ICT FIRMS IN GREATER SEATTLE



## COMPANY SPOTLIGHTS

### MICROSOFT

Microsoft is the largest software company in the world employing 124,000 people worldwide and 42,000 in the Greater Seattle area. Microsoft is also the world's second largest provider of cloud services as of 2018. Its direct impact is massive, contributing \$11.5 billion into Washington state's economy.

### AMAZON

Amazon is both the largest internet retailer in the world and the world's largest provider of cloud services (as measured by revenue). Amazon employs more than 300,000 worldwide and about 40,000 in Washington State.

### RESOURCES:

Center of Excellence for Information and Computing Technology  
<http://www.coeforict.org/>

Economic Alliance Snohomish County  
<https://www.economicalliancesc.org/>

Economic Development Board Tacoma-Pierce County  
<https://www.edbtacomapierce.org/>

Economic Development Council of Seattle & King County  
<http://www.edc-seaking.org>

Startup Seattle  
[www.startupseattle.com](http://www.startupseattle.com)

Technology Alliance  
<http://www.technology-alliance.com>

Washington Technology Industry Association  
<http://www.washingtontechnology.org/>

Washington Interactive Network  
<http://www.washingtoninteractivenetwork.org>

**GREATER SEATTLE**  
 PARTNERS

With thanks to: **WTIA**

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