



Future Outlook on the Information Society

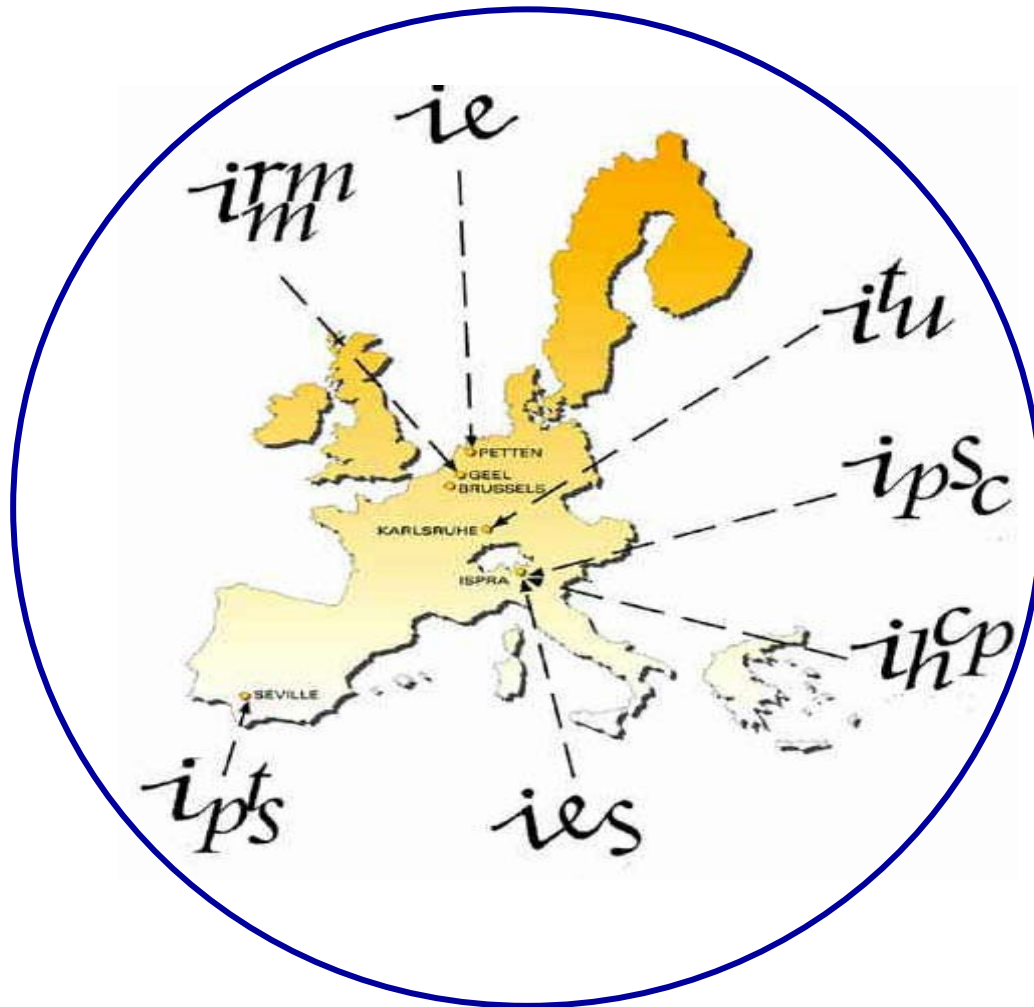
IS development patterns in the NMS and CCs to the EU

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The Institute for Prospective Technological Studies, IPTS



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The ENL / ICT Research Program



	Past Research	Deliverables
2001	What is the state of the art of ICTs in ACCs13?.....	"Bled" report
2002	Which contextual factors for successful IS developments in EU15?	"Tigers" report
2003-4	Factors and Impacts of IS developments in NMS and CCs.. ("New Entrants")	13 National Reports Synthesis Report Future Outlook Report
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2004-5	On-going research	
	<u>FISTERA</u> , Foresight on IST in the European Research Area	
	<ul style="list-style-type: none"> • Workshop, 18 Oct 2004, Bucharest, Romania 	
	<u>eGovernment and eHealth application areas</u>	
	<ul style="list-style-type: none"> • "Next steps in developing IS Services in the New Member States: eGov & eHealth" • "The eGovernment vision for EU in 2010: Research Policy Challenges" • "The Future of Independent Living Services in Europe" 	
	<u>Contribution to Advisory Groups</u>	
	<ul style="list-style-type: none"> • eEurope, ISTAG, Socio-Economic High Level Group 	





Key Research Questions in the ENL / ICT research area

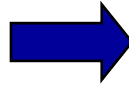
What IS policies are needed for the NMS and CCs, at European and national level, to meet the “Lisbon objectives” of a knowledge-based society of growth, cohesion, sustainability, by 2010?

- What is the current status of the IS developments in NMS and CCs?
- Which have been the most relevant factors that have influenced IS trajectories in NMS and CCs during the past decade?
- What are likely future IS development scenarios?



The "New Entrants" study, the approach

Clusters



Researched topics

Economic Factors

1. National and regional economy
2. Structural economical changes
3. Place & role of IST applications in the economy

Political Factors

4. National & Regional IS policies
5. Institutional capabilities and Regulatory background

Societal & Cultural Factors

6. Educational trends
7. Demographic trends
8. Cultural and societal trends



The "New Entrants" study, the Consortium

Country	Institute
Bulgaria	Institute for Market Economics
Czech R.	EEIP, Charles University
Estonia	Estonian Institute of Economics
Hungary	ICEG European Center
Latvia	Institute of Economics
Lithuania	Lithuanian Free Market Institute
Malta	Islands Consulting Services Ltd
Poland	Transformation, Integration and Globalisation Economic Research
Romania	Institute of World Economy, Romanian Centre for Economic Modelling
Slovakia	Slovak Governance Institute
Slovenia	Institute of Macroeconomic Analysis and Development
Turkey	Bilkent University



Patterns on ICT production

- ICT production is more country specific, and some factors explain the differences:
 - the quantity and quality of available human and physical capital
 - the economic policies
 - the size of the economy
 - the geographical proximity
- The impact of ICT production at national level is noticeable

Expected developments:

- Even more differentiation between countries is expected, and will continue to be context-dependent
- At EU level, geographical re-location expected
- Globalization effects have started and are expected to continue





Patterns on ICT usage

- ICT usage is there and growing
- ICT spending vs. GDP is higher than in EU
- In most ICT usage indicators, the NMS and CCs are in a weaker position than the previous 15 EU Member States
- Figures show significant differences between countries
- ICT is adding complexity to the growing social divides

Expected developments:

- ICT usage is expected to converge towards EU average, but also some lags expected



Major factors influencing IS developments in the NMS and CCs of the EU

Economic



Growth, Macro Economic Stability & Public Finances
Economic structural changes and the role of ICT
The role of FDI & other financing tools
Corporate Sector and ICT industry

Political



Committed and co-opetitive IS policies
Privatisation, Regulation and their related institutional settings
EU coordination, benchmarking and policies

Socio-
Cultural



The Changing Consumption patterns
Literacy, Capabilities, Skills, Education
Essential intangible assets



Concluding remarks

- ICT production and ICT use:
 - Both have a relevant impact on economic growth (Lisbon)
 - No clear direct casual link between ICT production and ICT use
 - The potential contribution of ICTs to social cohesion needs to be better understood
 - Context-dependency is a key development factor
- ⇒ Some policy orientations:
 - General policies are key for an Information **Society** project
 - Policies for ICT production development are of “sectorial” type
 - Specific policies for ICT use should be linked to General policies
 - *Thus, holistic and sectorial*



Thank you.

Dziękuję.

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Today's agenda

Morning session: Lessons from IS developments

9h00: Introduction



9h15: Eastern Europe trends in ICT production and ICT use

10h15: Coffee break

10h30: The Polish case

11h15: Open Debate: Major IS policy issues at EU level

12h00: Lunch break

Afternoon session: Future challenges for IS developments

13h30: Introduction

13h45: Social divides / Digital divides: the role of ICT

14h30: Growth-Demography-Education in a Knowledge Economy

15h15: Coffee break

15h30: ICTs and Economic Restructuring

16h15: Open Debate: Future challenges for IS policy at EU level

17h00: End of session



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