

SEPE

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NEWS



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Technology will change the operations
of the public sector and the citizens' behaviour

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Why a "Digital Leap"
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The role of SEPE in the Greek market

The Federation of Hellenic Information Technology & Communications Enterprises (SEPE) is a non-profit organisation, established in 1995. Over 450 companies are currently members of SEPE and collectively they hold more than 95% of the country's turnover in the Information Technology and Telecommunication Industry.

The main objectives of SEPE are to promote Information and Communications Technologies (ICT) in Greece and to enlarge ICT Industry's market. SEPE also represents the interests of the Greek ICT Enterprises vis-à-vis the Greek Government, the European Commission and other bodies of influence.

SEPE's Imperatives

SEPE is an advisor to many national and international bodies, as well as the Government, the Academic and Research Communities, Business Bodies and Fora. Utilising this role, SEPE is currently lobbying for:

- The rise of the public awareness on the importance of ICT and the

The main objectives of SEPE are to promote Information and Communications Technologies in Greece and to enlarge the ICT Industry's market



transition of our society to an information society for all.

- The modernisation of Public Administration with the use of Information Technology.



- The development of a high - speed telecommunication network to address and assist the current Communication Infrastructure
- The design and implementation of programs aimed at addressing the needs of Small and Medium Enterprises (SMEs) and improving their competitiveness in the market



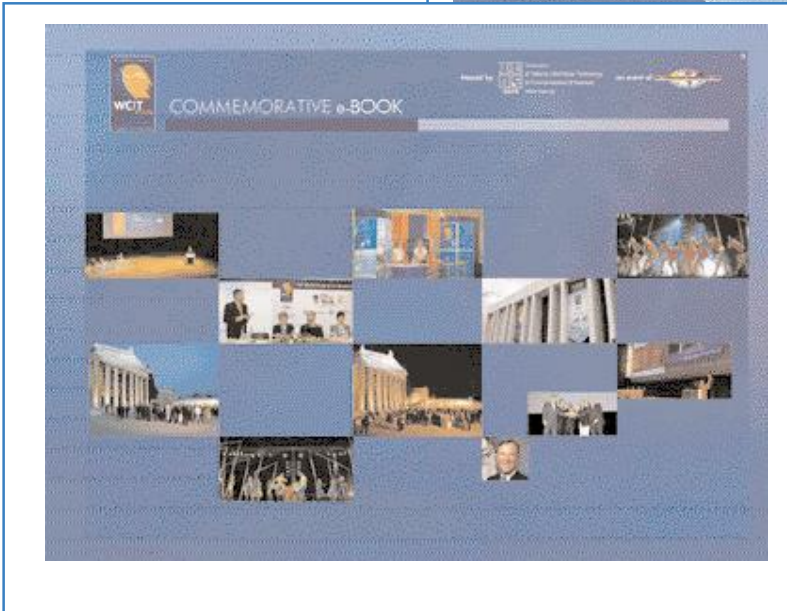
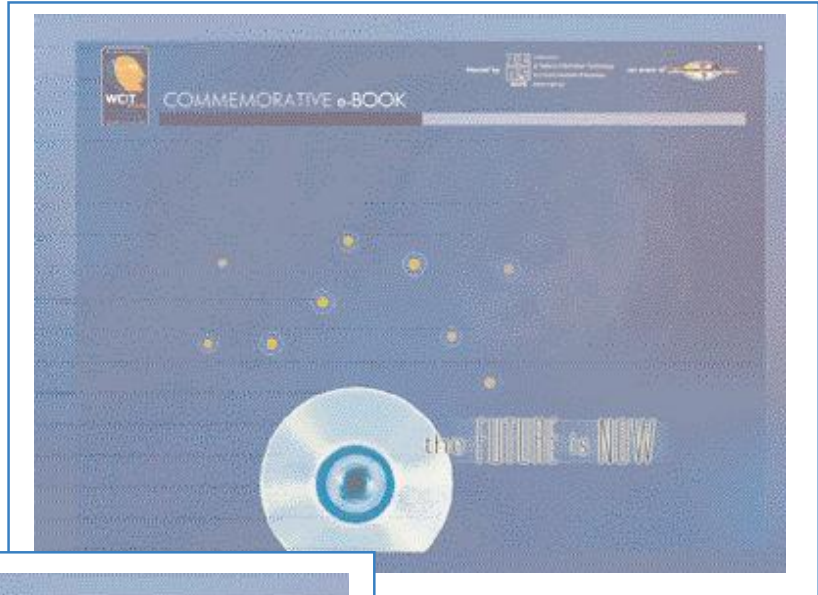
- The engagement of Information Technology into all levels of the educational system and the evolution of computing literacy and technology expertise.
- The cooperation between the ICT market and the educational system in order to coordinate the design of the study curricula according to the market needs.

Joint Ventures, International Alliances and Investment in the ICT Industry

SEPE represents the interests of the Greek ICT Enterprises via its

membership to the World IT and Services Alliance (WITSA), the European IT Services Association (EICTA), the International Telecommunication Union (ITU) and other bodies of influence.

SEPE considers joint ventures of Greek companies with international ones to be a key contributor in promoting its members' interests and enlarging the industry's market. To this end, SEPE is encouraging and supporting collaboration of Greek enterprises with others in the Balkans and Mediterranean region via fairs, business projects and export promotion programs.



World Congress on Information Technology 2004 - The future is now

Information and Communication Technologies inspired the theme of the 14th World Congress on Information Technology (WCIT 2004) which held in Athens, Greece, May 19-21, 2004. The official host of the Congress was SEPE.

WCIT2004 was the world's premiere technology forum that brought together top corporate executives, policymakers from national and international organizations, Government executives, distinguished academics and leading personalities from the ICT sector.


The Greek economy and the enterprises of the ICT Industry will focus their efforts on two main challenges:

1. The first challenge is to capture the opportunity of leveraging funds and investments for the modernization of the Greek Enterprises, especially SME's. This effort will strengthen the ability of the Greek ICT industry to

participate in joint ventures and international alliances from a much better position than now.

2. The second challenge, which comes as a second step, is to expand more aggressively the relative businesses and investments outside Greece mainly in the South East European area.

SEPE's Committees

- Committee for Public Sector ICT Projects for the Information Society
- Committee for Private Sector Projects
- Committee for e-Communications. 

Brighter future

The European Information Technology Observatory (EITO) forecasts a brighter future for the European Information and Communications Technologies (ICT) market. In 2005 the growth rate of the European ICT market is expected to reach 4% from 3.3% in 2004 and 0.9% in 2003. Information Technology will be promoted through innovations and new technologies that have already begun to dynamically penetrate the economy and society. RFID (Radio Frequency Identification), personal digital devices, mobility, digital music and imaging are some of the trends that will characterise the IT sector. Regarding telecommunications, the broadband networks take centre stage.

Growth rate and market value

The share of the European Union of the '25' in the global ICT market will reach 32.1% in 2005. More analytically, the activity of the European Union's member-states in the global IT market will correspond to 33.8% and in the global Telecommunications market it will reach 30.7%. The most dynamic countries are expected to be Ireland, with a growth rate of 6.1% in its ICT market and Great Britain with a growth

rate of around 4.6% (Table 1). As far as the new member-states are concerned, the pioneering countries will be Poland with a growth rate of around 10.1% in its ICT market and the Baltic States with a growth rate of 9.2% in their ICT markets (Table 2).

Greece

The European Observatory is optimistic regarding the course of the Greek technology market this year (Figure 1) It is expected that the growth rate of the IT market in our country will reach 5.5% compared to 3% in 2004. The value of the Greek IT market in 2005 is calculated at around €2.019bn (Figure 2). For 2006, EITO expects a growth rate of 5.4% in the Greek IT market and the market value is expected to reach €2.128bn. More analytically, the computer hardware sales are expected to reach €722m, recording a rise of 4.6% compared to 1.9% last year. The biggest rise appears on laptops (23.4%) and on high-end servers (22.5%). The software sector is expected to record sales of €364m this year compared to €345m last year, with a rise of 5.5%, while in 2006 the sales are expected to reach €385m, or a percentage of 5.8%. The IT services

in the Greek market are expected to top €716m this year from €673m last year, recording a rise of 6.3%, while in 2006 are expected to reach €773m, recording a rise of 8.1%. The total ICT equipment is expected to reach €1.879bn, recording a rise of 5.5%, while the sales for 2006 are expected to reach €1.968bn. In telecommunications, Greece maintains its high performance, and according to EITO in 2005 the growth rate of this particular market will reach 3.5% from 3.4% in 2004 with a value of €6.05bn. A corresponding rise is also expected during 2006, with a value of €6.262bn and a rise of 3.5% (Figure 2).

European Union

Compared to the United States, the E.U. is facing structural productivity problems, related to the delay in the transition to the 'Knowledge Economy'. The E.U. hopes that the broadband networks will penetrate with a percentage bigger than 75%, with the participation of the 500 million people that constitute the European market. This will open new ways for the development of content industry and Internet services in Europe. During 2004, in Western Europe the gains from the mobile data services were considerable. The profits

Western Europe ICT Market / Country, in € m.									
Country	2002	2003	2004	2005	2006	2003/02	2004/03	2005/04	2006/05
Austria	13,526	13,617	13,983	14,543	15,108	0.7%	2.7%	4.0%	3.9%
Belgium/Luxembourg	17,266	17,189	17,664	18,305	18,928	-0.4%	2.8%	3.6%	3.4%
Denmark	12,043	12,104	12,601	12,952	13,406	0.5%	4.1%	2.8%	3.5%
Finland	9,136	9,176	9,544	9,964	10,392	0.4%	4.0%	4.4%	4.3%
France	88,456	87,901	90,653	93,650	96,695	-0.6%	3.1%	3.3%	3.3%
Germany	124,805	125,084	128,345	132,753	136,828	0.2%	2.6%	3.4%	3.1%
Greece	7,385	7,519	7,763	8,069	8,390	1.8%	3.2%	3.9%	4.0%
Ireland	5,863	5,936	6,214	6,592	6,959	1.2%	4.7%	6.1%	5.6%
Italy	64,229	64,822	66,599	69,111	71,836	0.9%	2.7%	3.8%	3.9%
Netherlands	30,791	30,695	31,414	32,797	34,003	-0.3%	2.3%	4.4%	3.7%
Norway	9,209	9,216	9,585	9,921	10,252	0.1%	4.0%	3.5%	3.3%
Portugal	8,205	8,361	8,627	8,943	9,265	1.9%	3.2%	3.7%	3.6%
Spain	34,285	35,125	36,088	37,350	38,623	2.5%	2.7%	3.5%	3.4%
Sweden	20,832	20,671	21,146	21,882	22,784	-0.8%	2.3%	3.5%	4.1%
Switzerland	19,433	19,205	19,582	20,269	20,979	-1.2%	2.0%	3.5%	3.5%
United Kingdom	108,759	109,866	114,070	119,307	124,631	1.0%	3.8%	4.6%	4.5%
Western Europe Total	574,223	576,487	593,878	616,408	639,079	0.4%	3.0%	3.8%	3.7%

Table 1

Technologies in Greece

ICT Market in the 10 New Member States of the E.U./ Country, in € m.

Country	2004	%
Bulgaria	1,691	4.6%
Czech Republic	6,133	16.6%
Estonia	767	2.1%
Hungary	5,716	15.4%
Latvia	839	2.3%
Lithuania	1,053	2.8%
Poland	13,873	37.5%
Romania	3,637	9.8%
Slovakia	1,988	5.4%
Slovenia	1,343	3.6%
Total 10 New Member States E.U.	37,040	100%

Table 2

The digital-related industry in Europe enters a new, more creative and productive phase, by searching for ways of development, aiming at attracting consumers and increasing profits

of information services reached €376m, the profits of games €254m, the profits of image transferring €150m, and the profits of ring tones and music reached €1,8bn. The digital-related industry in Europe enters a new, more creative and productive phase, by searching for ways of development, aiming at attracting consumers and increasing profits.

Central & Eastern Europe

EITO's conclusions are also optimistic for the ICT markets of Central and Eastern Europe. E.U.'s new member-states have already shown very rapid growth rates in the new technologies sector and in the creation of the proper infrastructure. The growth rate of the ICT market in the countries of Central and Eastern Europe is expected to reach 11.4%.

During 2006 the growth rate is expected to slow down and reach 8.4%. More analytically, IT plays an important role in these countries, by showing a double figure growth rate of around 12.5% for 2006 compared to 7.4% for the telecommunications market. In those countries, a particular emphasis is placed on reinforcing demand and supplying broadband networks. □

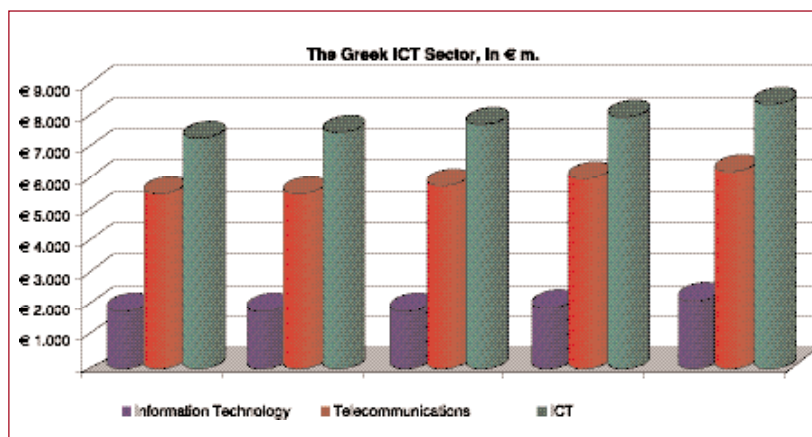


Figure 1

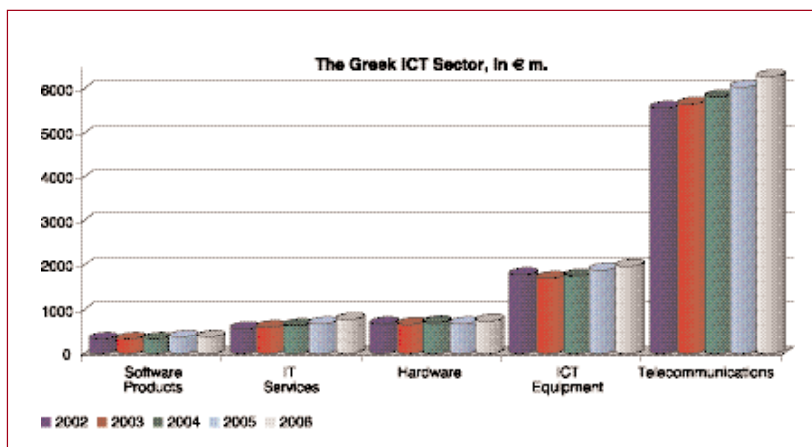


Figure 2



Prof. PROKOPIS PAVLOPOULOS

Technology will change the operations of the public sector and the citizens' behaviour

The first years of the implementation of the Operational Programme 'Information Society' (OPIS) showed an evident delay in the absorption of funds; however we are optimistic that we will considerably contain any probable losses of funding in the future. Our government's objective is to focus on ICT infrastructure, implementations whenever deemed necessary, and to reinforce the extrovert character of the citizen-centred Public Administration.

It has to be noted that we have already achieved a better coordination of the programme and more extensive cooperation amongst the participating bodies, despite being in the middle of the implementation of the OPIS. We are therefore confident that until the end of the OPIS, the projects will be gradually delivered, with comprehensive electronic services reaching citizens and businesses. At the same time, we continue



In Greece, however, we intensify the implementation pace of the OPIS, we coordinate our actions, and engage ourselves in a dialogue with society in order to move forward

to expand and support the Citizen Service Centres (KEP), which will act as the one-stop-shops of Public Administration.

The government as a whole and our Ministry, in particular, are moving towards two directions: first, to the completion of the necessary ICT infrastructure in Public Administration and secondly towards the

electronic provision of administrative services to the Citizen, which will be based on the seamless information transfer from the Public Administration to Citizens.


It is expected that in this way, the use of new technologies can lead to the simplification of the processes within the Public Administration and to a totally new behaviour by the Citizen when interacting with the State.

At the same time, and as appropriate, we will leverage the possibilities of outsourcing services for the implementation of projects.

After all, it is globally acceptable that the State has two basic roles: to ensure social justice and to act as a guide for economic development. What needs to be done is the planning and implementation of public policies aiming at the re-establishment of Public Administration.

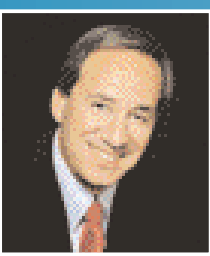
This, of course, will require a re-organisation that will be based on:

- The improvement of infrastructure and the promotion of Electronic Administration
- The evolution of the administration vote of human capital
- The best quality of the services provided

Consequently, the objective is a Public Policy for the Citizen, close to the Citizen. We have to note, however, that even within the European Union differentiations do exist regarding the level of accomplishment of the targets on the implementation of Electronic Government. As a recent report by the Dutch Prime Minister showed, there is still a great deal that the European Union has to do. In Greece, however, we intensify the implementation pace of the OPIS, we coordinate our actions, and engage ourselves in a dialogue with society in order to move forward. 

Prof. Prokopis Pavlopoulos is the Minister for the Interior, Public Administration & Decentralisation of Greece.

Reprinted from SEPE news no. 12



Information society is an area of cooperation between public and private sector

At the beginning of the 21st century, new technologies constitute an important tool for the improvement of the citizens' standards of living and the growth of the country's competitiveness. On the other hand, technology by itself does not guarantee either development or prosperity. The importance of the 'Information Society' lays on the exploitation of new technologies, both in the public and the private sector, in order for it to play an important role in the country's economy as well. Furthermore, it has to be noted that not only should there be infrastructure allowing the use of new technologies, but their users should also be appropriately trained.

The power of the 'Information Society' is mainly based on that intended good and two-way relationship of citizens and society with technology, which also guarantees the improvement of accessibility for everyone.

Our government, having set as an important target the fast integration of technology to the country's economic life, has quickly highlighted the need for an integrated and coherent strategy, especially for the Information Technology Sector, and consequently, for electronic government.

The significance our government attributes to new technologies and to the "Information Society" also becomes quite clear from the new Developmental Law that encourages the growth of investments for the provision of services for extremely sophisticated technology. At the same time, this new law highlights the intensive developmental dimension of technology by supporting investments for the development of broadband infrastructure, thus recognising the challenges of the future.


There has been considerable progress in the Organisational Programme "Information Society" during the last ten months. Important changes were implemented at all levels of the programme, in order to simplify its implementation

The private sector is an important ally with its influential know-how, the ability to co-finance projects, its international co-operations and powerful human resources

procedures and achieve results at a more rapid pace that would be visible to citizens and businesses.

Furthermore, our government supports electronic governance because it involves a change in terms of organisation and the ways of working. Technology is simply the tool, the means for a more effective and better relationship with citizens and businesses, on the basis of a more efficient overall procedure. It is therefore easily understood that

electronic government constitutes one of the most important priorities for the Greek economy and our government. A basic prerequisite for the success of this attempt is the participation of citizens. The role of a modern and democratic state is to ensure that all citizens will benefit from new technologies and to help businesses in leveraging these technologies.

What becomes obvious is that in this zestful attempt, the private sector is an important ally with its influential know-how, the ability to co-finance projects, its international co-operations and powerful human resources. The results of this relationship can be maximised if we regard each electronic government project not as a tug-of-war between the public and the private sector, but as an area of common effort and mutual benefit. Any such cooperation will offer significant gains to all citizens and it can further act as the main area of cooperation between the public and the private sector, thus marking a new, more efficient relationship between the two. 

*Dr. George Alogoskoufis is the Minister of Economy and Finance of Greece.
Reprinted from SEPE news no.12*





DIMITRIS SIOUFAS

Priority to the development of Information Technology, Telecommunications and High-End Technology services

Our government decided to pass on a new developmental law that will establish special categories of business plans, aimed, amongst others, at supporting innovation, new technologies and competitiveness among businesses. In this way, the available investment activities, as well as the sponsored investment plans, will be expanded and the areas of Information Technology, Telecommunications, high-end technology services and logistics will be covered. At the same time, this particular law will decrease the minimum amount for an investment plan to €100,000 for very small businesses and set the limits for small, medium and large companies to €150,000, €250,000 and €500,000 respectively. Therefore, with these new minimum limits of investment, therefore, the technological modernisation of a wide spectrum of small and medium-sized companies will be facilitated.

The actions of the Ministry of Development aim at transferring the new technologies from the research labs to the productive bodies and to support businesses in their attempt to adopt and exploit these new technologies in the areas of production, quality control and distribution of their products

Furthermore, the law will also facilitate the promotion of business plans by new business people that do not have the necessary start-up funds, but have smart business ideas and increased possibilities of exploiting new technologies.

To support the businesses in the ICT sector, the General Secretariat of Research and Technology embraces important research and technological bodies. In addition, the National Network of Research and Technology offers to the Greek academic, research and educational communities high-end services and access to a nation-wide high-capacity Internet network that accommodates the needs of all Universities, Technological Educational Institutes, the country's research centres and 9,500 schools via the Panhellenic Schooling Network.

What becomes obvious is that our Ministry in particular, undertakes a number of actions aiming at the development of new technologies and research in pioneering sectors. These actions intend to familiarise as many young scientists as possible with the new technologies. Clearly, our target is to transfer the new technologies from the research labs to the production and to support businesses in their attempt to adopt and exploit these new technologies in the areas of production, quality control and distribution of their products. In that process, there are specific priority sectors, namely Energy, Information Technology, Agriculture and Food.

We always have to keep in mind that it is very important for a cooperation

plan to exist between the public and the private sector for the promotion of new technologies and the competitiveness of the Greek economy. At the same time, there are a number of actions in the operational programme "Information Society" towards the development by the public sector of a wide range of services aimed at the citizens.

As far as we are concerned in the Ministry of Development, we try - through each programme that we implement - to encourage the modernation of the electronic equipment of both small and large businesses. In that way, these businesses will be in a position to communicate electronically with the Ministerial departments. This is, of course, a pattern for the government as a whole, and similar attempts are carried out by other Ministries as well.

Finally, we have to note that in order for the Greek business activity to be further enhanced, certain initiatives for intergovernmental cooperations have been undertaken. These initiatives are distinct, based on the special investment interests and the opportunities of entrepreneurial cooperations in each country or in each region separately. Each of these initiatives is developed and processed through an integrated system for the development of intergovernmental relations that has been established especially for the accomplishment of this particular purpose. □

Mr. Dimitris Sioufas is the Minister of Development of Greece.

Reprinted from SEPE news no.13



Why a "Digital Leap" is the only option left...

According to the April 2004 World Economic Forum report, Greece does not hold a prominent place at the international technology-related rankings. Unfortunately, numerous reasons have led to this condition. A major factor has been that, until as late as the first months of 2004, Information and Communication Technologies have not been perceived as a strategic element for the country's growth.

However, this perception has changed a lot in the last 18 months. In June 2004 the government put into place a cross-departmental ICT Committee and has assigned it the role of crafting a new digital strategy for Greece. This process has not been an easy one.

The new digital strategy already comprises over 65 specific and it is complemented by a series of tangible targets and metrics

It is important that for the first time, an institutional body such as the ICT Committee, decided to diagnose the root-causes and not the symptoms, which led to low technology-use in the past decade. The findings have been necessarily painful. The ICT Committee diagnosed 20 root-causes which led to this condition and which have to be "cured".

During the strategy preparation process, international best-cases were investigated and relevant policies were examined

closely. More than 15 CEO's and key decision makers from firms and associations alike, were involved in the process of diagnosing the true causes of delay as well as in the development of strategic guidelines.

The result of this effort has been a new "Digital Strategy" for the period 2006-2013, which is currently under public consultation. The new digital strategy places ICT high in the country's agenda and treats new technologies as a strategic priority for Greece for the period 2006-2013. The vision is to perform a "Digital Leap to Productivity and Quality of Life".

The digital strategy comprises two main strategic objectives:

- a. Enhanced business productivity through the use of ICT, and new skills,
- b. Improved Quality of Life through ICT.

The two strategic objectives are further decomposed into 6 main directions, including:

Business Productivity

- Boost ICT uptake by businesses
- Offer a large number of digital services to businesses
- Support the ICT sector as a pillar of the Greek economy
- Support entrepreneurial activity in ICT-enabled ventures


Quality of Life

- Improve citizen welfare through ICT
- Develop e-services for the citizen



The new digital strategy already comprises over 65 specific and it is complemented by a series of tangible targets and metrics. The initiation of operation of the Observatory for the Information Society in the last 12 months, which measures the impact of ICT at the citizen and business level and transfers international know-how, will prove helpful to this direction.

Regardless of the final outcome of the consultation, the vision for a "Digital Leap" has not been made by chance, for it is a leap that is required in order to gain the time lost.

However, Greece does not only require an ICT leap. ICT is not an end to itself. The Digital Leap will be of value, if and only if it can translate into higher business productivity and increased welfare for the citizens. That is when this Digital Strategy or indeed any other ICT-related intervention will have served its true role. 

Prof. Vassilios Assimakopoulos is the Special Secretary for the Information Society of the Ministry of Economy and Finance of Greece.

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