

OBSERVATORY



for the greek
information society

Monitoring ICT progress

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President of Board of Directors

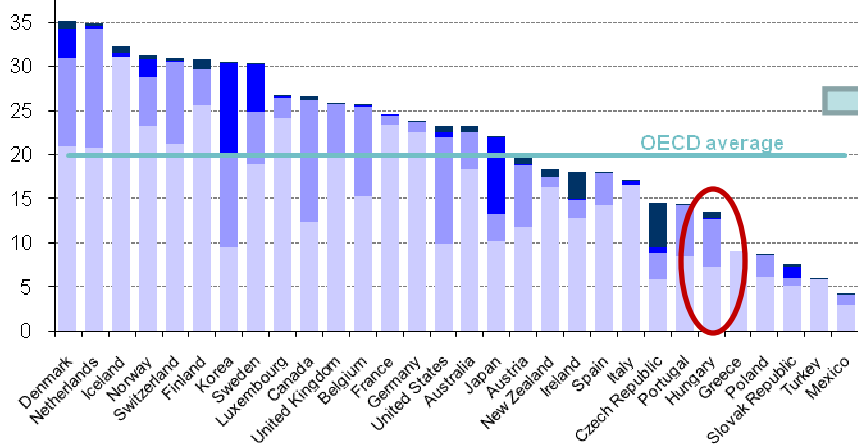
Athens, Greece

October 21st & 22nd, 2008



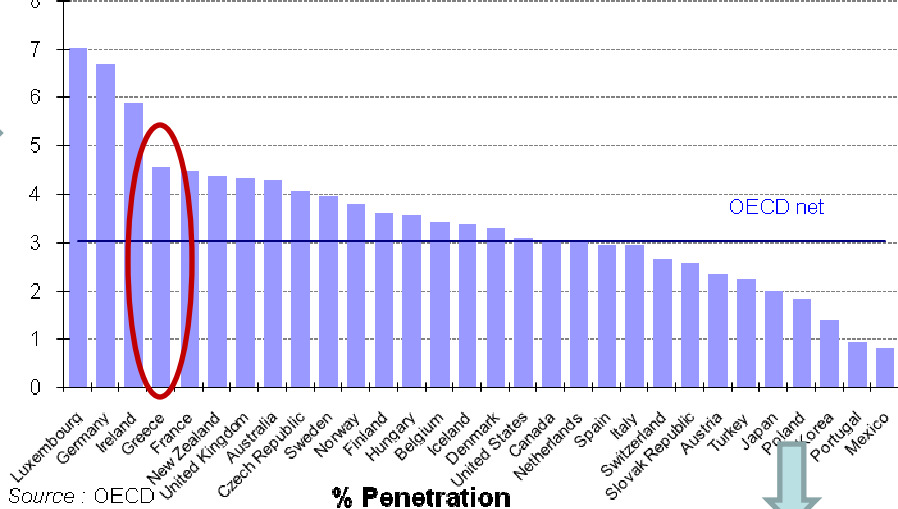
Though a laggard, Greece is quickly covering the "gap" with other developed countries

OECD Broadband subscribers per 100 inhabitants, by technology, December 2007



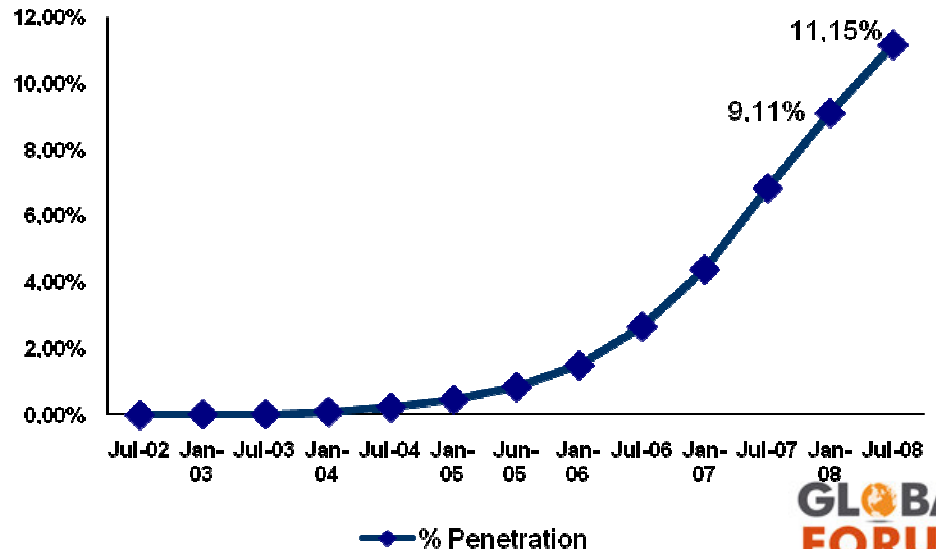
Source: OECD

OECD Broadband penetration (per 100 inhabitants) net increase



Source: OECD

- ❑ Greece is expected to meet up with EU average and OECD average in the next 2 years or less.
- ❑ Double & triple play services adoption along with the 2 large broadband infrastructure plans (one under implementation and the second [Fttx] in the final phase of consultation) are expected to boom the local market.
- ❑ Thus, we are expecting a significant change in the % of capita spent in ICT toward bb services

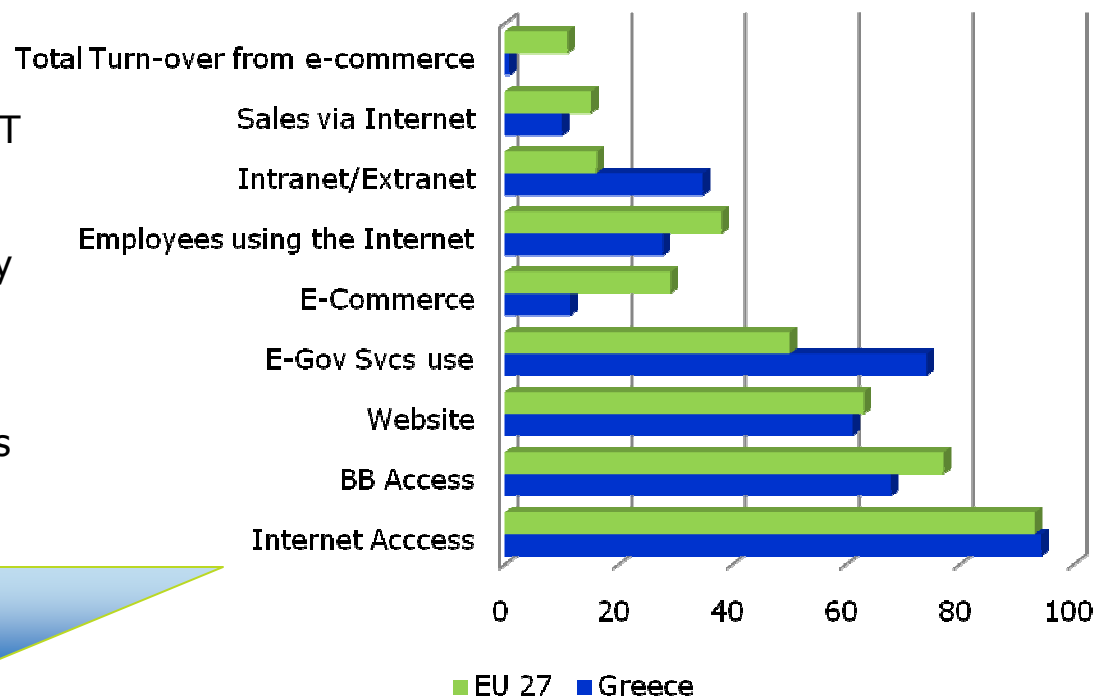




Greek Enterprises (10+) have already succeeded in closing the digital gap with their EU counterparts

Main issues

- Investments in BB access and ICT services account most for this convergence
- Greek Enterprises use extensively the available e-gov services.
- There are problems in using the Internet as a fully commercial channel. Still, we are expecting this to change in the immediate future.



Our Concern lies in the SME's (Enterprises 10-) lower than expected adoption rate of ICT: Only 1/3 SME's exploit Digital Opportunities. (EU data non available)

Next Steps

- Focus in the SME's digital convergence e.g "new e-services initiative"
- Regional and Sector-specific initiatives to promote collaboration, clustering and efficient use of bb infrastructures deployed for local public authorities

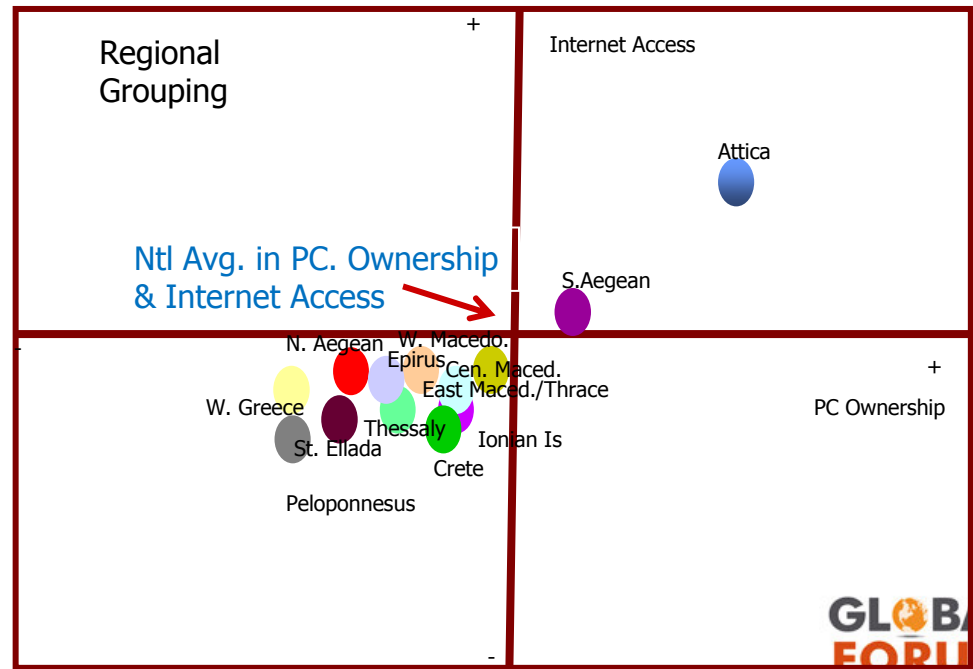
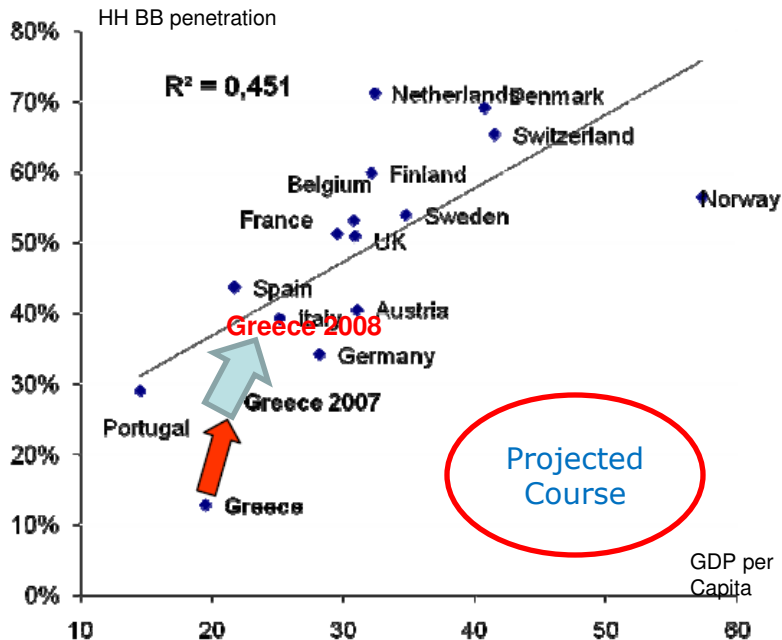


Greek Citizens are adopting ICT at a satisfying and promising y-o-y rate

Conclusions

- In the up to 35 age groups, Greeks tend to exploit ICT as much as the rest of EU citizens
- Age, educational levels and place of living are the main discriminating factors.
- In the last 3 years we've witnessed big leaps in digital convergence which based on macro data, e.g. GDP to BB penetration correlation, we are expecting to continue at the same fast pace.

	Greek Avg	EU Avg
16-25 a.g.	73,3	73
26-35 a.g.	50,7	54
36-45 a.g.	37	
46-55 a.g.	20,4	
56-65 a.g.	8	20
66-74 a.g.	2,5	





The new Broadband Performance Indicator

Need for a clear understanding and definition of the phenomenon to be measured:

- To measure the relative performance of countries in the wide broadband economy
- To identify relative weaknesses and strengths of individual countries and fine-tune policy making
- To better understand the relative propensity of countries to maximise broadband impacts

The BPI will rank countries in terms of supply and demand factors that affect the take-up and use of broadband.

Dimensions were selected on the basis of their relevance to the objective of the index:

1. Broadband availability (coverage)
2. Degree of competition
3. Quality (speeds)
4. Affordability (prices)
5. Usage
6. Socio-economic context



European Broadband Performance Index

BROADBAND PERFORMANCE INDEX



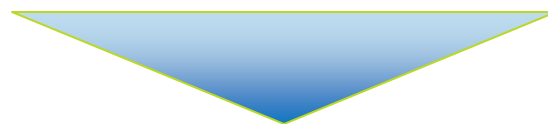


The New Greek Digital Strategy Composite Indicators - Objectives

Need for the development of a research methodology and a structured indicator framework that will measure and assess the impact of ICT in business economic growth and the society in Greece.

The Greek “Digital Strategy 2006-2013” comprises two main objectives:

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



2 composite indicators will be developed to track the progress and measure the impact in each pillar of the Greek Digital Strategy:

- 1. Business Productivity Index**
- 2. Quality of Life Index**



Business Productivity Index

Business Productivity Index

ICT deployment by businesses	Human resources	ICT Innovation & access to knowledge	Legal & business environment	ICT Infrastructure Availability	ICT Sector
<ul style="list-style-type: none"> Investment in ICT by enterprises Access to the internet & level of use by employees Level of business process automation (e-commerce, e-procurement & back-end) Level of e-commerce revenue and e-procurement transactions Level of telework deployment 	<ul style="list-style-type: none"> Investment in ICT training and level of training provided Level of employee ICT skills E-learning platform deployment 	<ul style="list-style-type: none"> Level of ICT based innovation (products, services, processes, knowledge transfer) In-house ICT R&D investment and participation in ICT R&D publicly funded programmes ICT patent production 	<ul style="list-style-type: none"> Quality of ICT public policies, government initiatives and legal environment Capital investment in ICT startups (Venture capital) 	<ul style="list-style-type: none"> Broadband infrastructure - population & geographical coverage Public investment in ICT and e-services Government e-services availability & level of use by businesses 	<ul style="list-style-type: none"> In-house ICT R&D investment Percentage of Innovative enterprises in sector Employment levels in sector



Quality of Life Index

Quality of Life Index

ICT Infrastructure Availability

- Broadband infrastructure - population & geographical coverage
- ICT in education
 - Educational institutions access to the internet
 - Number of pupils per PC
 - Higher education curricula involving ICT in the teaching process
- Accessible e-Government services

Citizen Ability to Use ICT

- Access to the internet and level of use by citizens
- Internet access cost
- e-Services level of use - breakdown by specific service (e-commerce, public services, entertainment, etc)
- Citizen ICT skills level
- Citizen level of awareness of ICT use benefits
- E-services accessibility (W3C standards & multichannel delivery)

Citizen Satisfaction from ICT use

- Perceived usefulness
- Perceived ease of use
- Perceived security levels in ICT use
- Trends for increased use

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