DIGITAL.GREECE.NOW

ATHENS, DECEMBER 9, 2019
AGENDA

01
STATE OF THE NATION

02
UNLOCKING DIGITAL

03
THE ROAD AHEAD
01
STATE OF THE NATION

02
UNLOCKING DIGITAL

03
THE ROAD AHEAD
# Greece’s Digital Anatomy Surfaces a Weak Position Against Its Global and European Peers...

## 3rd Party Digital Indexes

### DESI (2019)

The Digital Economy and Society Index ranks Greece near the bottom of the European sample, with only two countries ranking lower, Bulgaria and Romania.

1. Finland
2. Sweden
25. Poland
26. Greece
27. Romania
28. Bulgaria

(The EU’s Digital Economy and Society Index (DESI) measures the progress of EU countries towards a digital economy and society)

### DEOI (2018)

The Digital Economic Opportunity Index ranks Greece last among a European sample of 22 countries, behind Turkey and Hungary.

1. Sweden
2. United Kingdom
3. Switzerland
20. Hungary
21. Turkey
22. Greece

(Accenture’s Digital Economic Opportunity Index (DEOI) measures the extent to which digital has penetrated economic activity at a national level)

### EGDI (2018)

The eGovernment Global Development Index ranks Greece low, just above Cyprus and below Uruguay.

1. Denmark
2. Australia
34. Uruguay
35. Greece
36. Cyprus
193. Somalia

(The eGovernment Development Index (EGDI), provided by the United Nations, measures the readiness and capacity of national administrations to use ICT to deliver public services)

### IDI (2017)

The ICT Development Index ranks Greece at the 38th place, between St. Kitts and Nevis and Qatar.

1. Iceland
2. Republic of Korea
37. St. Kitts and Nevis
38. Greece
39. Qatar
176. Eritrea

(The ICT Development Index (IDI) analyzes the pervasiveness of ICTs and the extent of digital divides between countries and aggregates quantitative indicators for ICT access, use and skills across a majority of global economies)

### DEI (2017)

The Digital Evolution Index ranks Greece at the 38th place, between Turkey and Russia.

1. Norway
2. Sweden
37. Turkey
38. Greece
39. Russia
60. Bangladesh

(The Digital Evolution Index (DEI) analyzes the progress of the digital economy across 60 countries, combining more than 100 different indicators across four key drivers: Supply Conditions, Demand Conditions, Institutional Environment, and Innovation and Change)

**Sources:**
... SITUATING THE COUNTRY AT THE TAIL END OF EUROPE’S “DIGITAL RIFT”...

DIGITAL ECONOMY & SOCIETY INDEX 2019 (# OUT OF 1)

Source: Digital Economy and Society Index 2019, European Commission, 2019
...WITH ITS INDUSTRIES EXHIBITING A SIMILARLY LOW DIGITAL MATURITY

DIGITAL MATURITY OF GREEK SECTORS 2018

<table>
<thead>
<tr>
<th>Sector</th>
<th>Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive, Industrial, Infrastructure &amp; Transportation</td>
<td>1</td>
</tr>
<tr>
<td>Business Services</td>
<td>2</td>
</tr>
<tr>
<td>Chemicals &amp; Refined Petroleum</td>
<td>3</td>
</tr>
<tr>
<td>Communications</td>
<td>4</td>
</tr>
<tr>
<td>Construction</td>
<td>5</td>
</tr>
<tr>
<td>Consumer Goods</td>
<td>6</td>
</tr>
<tr>
<td>Financial Services</td>
<td>7</td>
</tr>
<tr>
<td>Natural Resources</td>
<td>8</td>
</tr>
<tr>
<td>Retail</td>
<td>9</td>
</tr>
<tr>
<td>Tourism</td>
<td>10</td>
</tr>
<tr>
<td>Utilities</td>
<td>11</td>
</tr>
</tbody>
</table>

1. European Sample: Cyprus, Greece, Italy, Austria, Spain, Germany, Sweden, France, Belgium, Netherlands, United Kingdom

A NUMBER OF FACTORS CONTRIBUTED OVER THE YEARS TO GREECE’S UNFAVORABLE POSITION

- Economic Recession
- Absence of a National Digital Vision
- Lack of Continuity in the National Digital Strategy
- Lack of meaningful collaboration between the Private and the Public Sector
- Limitless interconnection and synergies between the Private Sector and Greek Academia
- Absence of a Digital Governance Model
- Absence of a structured Performance Management Framework
- Outdated Regulatory Framework
- Lack of an attainable action plan

The strategy adopted by each country for their rotation to digital significantly differs.

Countries are building their strategies on the basis of their competitive advantages, their digital maturity levels, and in the backdrop of the continuous technology advancements that directly impact the markets and societies.

Digitally advanced countries did not achieve their digital transformation overnight.

Greece does not have the luxury of time to follow the “j-shift” that its digitally advanced peers have followed.

In order not to lose momentum, we need to take a shortcut and adopt an “holistic” strategy that will “i-lift” the nation to its digital future and will positively impact the growth of the Greek economy.

AGENDA

01
STATE OF THE NATION

02
UNLOCKING DIGITAL

03
THE ROAD AHEAD
DEFINING THE DIGITAL VISION

“Improve and ease the everyday quality of life for citizens and productivity of businesses measurably, through the simplification and digitization of the Greek bureaucracy and to transform Greece into “digital by default” by 2023.”

Kyriakos Pierrakakis
Minister of Digital Governance
WE HIT THE GROUND RUNNING AND SET UP THE RIGHT STRUCTURE TO EXECUTE

MINISTRY ORGANIZATION

Minister of Digital Governance
Kyriakos Pierrakakis

Deputy Minister of Digital Governance & Process Simplification
George Georgantas

Deputy Minister of Digital Strategy
Grigoris Zarifopoulos

Secretary General of Digital Governance & Process Simplification
Leonidas Christopoulos

Secretary General of Information Systems for Public Administration
D. Anagnostopoulos

Secretary General of Telecommunications & Post
Antonis Tzortzakakis
THE MINISTRY DRIVES A WIDE LEGISLATIVE REFORM AGENDA TO ACCELERATE ROTATION TO DIGITAL

KEY LEGISLATIVE ACTIONS

Introduce the legal framework for registries’ interoperability

Legally secure ENISA’s residency within Greek territory (Athens)

Introduce Growth Bill to adopt key measures:

- Simplification of the licensing process for the deployment of mobile antennas
- Introduction of Gov.gr portal
- Introduction of the National Process Simplification Program (ΕΠΑΔ)
- Set up of the National Cybersecurity Authority
- Design and introduction of standardized digital maps
- Establishment of a Digital Committee
- Set up of Observatory responsible for the monitoring of the abolition of “Bureaucracy”
IN PARALLEL WE DEFINED THE THREE STRATEGIC PILLARS TO OPERATIONALIZE OUR VISION

**STRATEGIC PILLARS**

1. **1ST PILLAR: SET THE FOUNDATIONS FOR GROWTH**
2. **2ND PILLAR: DRIVE MASS ADOPTION**
3. **3RD PILLAR: ENABLE NEW RELATIONSHIPS**
1ST PILLAR: SET THE FOUNDATIONS 4 GROWTH

KEY ACTIONS

1. **Design the Digital Transformation Bible**
   - 1.1 Design and implement the “Digital Transformation Bible”, that will introduce a structured, actionable and measurable Digital Strategy for Greece

2. **Create an eID Economy**
   - 2.1 Deploy nation-wide, modern, electronic identification cards (electronic ID cards) with biometric data and authentication capabilities
   - 2.2 Introduce unique citizen number

3. **Enhance digital connectivity**
   - 3.1 Introduce super-fast and ultra-fast broadband schemes
   - 3.2 Design a 5G Rollout strategy and set up and enforce a favorable regulatory framework for the deployment of 5G
   - 3.3 Procure and auction the required spectrum frequency bands by end of FY 2020
   - 3.4 Upgrade of schools’ connectivity infrastructure

4. **Modernize Greek Government’s IT infrastructure**
   - 4.1 Modernize and monitor digitally all public infrastructure maintained and operated by the Greek Government
   - 4.2 Improve, standardize, secure the Greek Government’s G-cloud infrastructure
   - 4.3 Introduce core IT systems across the Greek Government agencies, departments, and organizations (i.e. HRMS, ERP, CRM, Document Management System etc.)
   - 4.4 Introduce corrective measures for the immediate resolution of IPR breaches

5. **Take data “off the bench” and “into the game”**
   - 5.1 Design a clear and structured data strategy, set up a common interface of the main registries and create a common data lake to achieve continuous updating of data and unique entry of new records

6. **Enhance cybersecurity and space policy**
   - 6.1 Form a new, properly regulated cyber security authority and directorate
   - 6.2 Redefine space policy in terms of national security, civil protection, geo-monitoring, in order to incentivize ag-tech and research initiatives
KEY ACTIONS

7.1 Introduce Emergency Number 112
7.2 Digitize and interconnect all government services to businesses and citizens through applying the “once only” guiding principle (initial digitization of with 100 key life events)
7.3 Create and maintain a public registry listing all Greek Government services
7.4 Reform, improve, and modernize one-stop shop government services kiosks which require physical presence (colloquially known as “KEP” kiosks)
7.5 Design and introduce a unified e-government portal “gov.gr”, that will consolidate and provide relevant and required information, services, documents, and actions to citizens and organizations alike
7.6 Introduce new digital service (“beneficial owners”)

8.1 Accelerate reskilling of citizens of all group ages and provide targeted incentivization to improve digital literacy

2ND PILLAR: DRIVE MASS ADOPTION

Redesign, simplify and digitize end-to-end public services for citizens and businesses

Unlock the human capital
3RD PILLAR: ENABLE NEW RELATIONSHIPS

KEY ACTIONS

9. Support the Digital Economy

- Actively incentivize and systematically invest into Greek Digital Innovation Hubs
- Actively incentivize and systematically invest into the Greek Startup Ecosystem
- Build upon and improve the world’s leading movie cash rebate and tax incentive system as currently operated by EKOME, an agency which reports to the Ministry
- Financial incentivization for corporate technology investments
- Extend the scope of existing MoU’s with Estonia and UK for the provision of digital portfolio services
THE MINISTRY FOLLOWS A “PLAN & RUN” APPROACH TO MAINTAIN MOMENTUM

“PLAN & RUN” APPROACH

Wave 1 – “Quick Wins”
Time Horizon: 3 – 12 months

1.1 “Digital Transformation Bible”
2.1 eIDAS Rollout
2.2 Introduction of unique citizen number
3.2 5G Rollout strategy & favorable regulatory framework for 5G
3.4 Upgrade of schools’ connectivity infrastructure
4.1 Digitally monitor all public infrastructure
4.2 Critical infrastructure
4.3 Procure IT systems
4.4 Immediate resolution of IPR breaches
6.1 New cyber security authority and directorate
6.2 Redefinition of space policy

Wave 2 – Medium Term Actions
Time Horizon: By 2021 (Commence Work by EOY)

2.1 eID cards
3.1 Super-fast and ultra-fast broadband schemes
3.3 Procurement & auction of spectrum frequency for 5G
3.4 Upgrade of schools’ connectivity infrastructure
4.2 G-cloud infrastructure
4.3 Procure IT systems
4.4 Immediate resolution of IPR breaches
6.1 New cyber security authority and directorate
6.2 Redefinition of space policy

7.1 Emergency Number 112
7.2 Digitize selected government services through the “once only” guiding principle (digitization of with ~200 key life events) for citizens & corporations
7.3 Public registry listing of all Greek Government services
7.4 Modernization of one-stop shop government services kiosks (“KEP” kiosks)
7.5 Unified e-government portal “gov.gr”
7.6 New digital service (“beneficial owners”)
7.7 Digitize all government services through the “once only” guiding principle for citizens & corporations
7.8 Digitize all government services through the “once only” guiding principle for citizens & corporations
7.9 Public registry listing of all Greek Government services
7.10 Modernization of one-stop shop government services kiosks (“KEP” kiosks)
7.11 Digital reskilling of citizens of all demographic groups

9.1 Incentivization and investment into Greek Digital Innovation Hubs
9.2 Incentivization and investment into the Greek Startup Ecosystem
9.3 Boost of leading movie cash rebate and tax incentive system

1. ST PILLAR: SET THE FOUNDATIONS 4 GROWTH
2. 2ND PILLAR: DRIVE MASS ADOPTION
3. 3RD PILLAR: ENABLE NEW RELATIONSHIPS

Actions in progress or already completed
AGENDA

01 STATE OF THE NATION

02 UNLOCKING DIGITAL

03 THE ROAD AHEAD
TO MAINTAIN MOMENTUM, THE EU COMMISSION HAS A PIVOTAL ROLE TO PLAY

STRUCTURAL DISABLERS

REQUIRED ENABLERS

Advisory

Request Guidance for:
• Competition and regulatory approach on 5G infrastructure & market dynamics
• Digital taxation
• Digital Services Act
• Cybersecurity
• DSM progress & leading practices
• Simplification of procure to contract process

Execution

Request Support for:
• Enhanced funding (Structural Funds)
• Access to digital execution expertise
• Setup of a European GovTech Innovation Lab co-funded by EU/EC
THANK YOU