



Shape of IT Today and Tomorrow

Government sector in Central & Eastern Europe

8 April 2013

IDC: Getting Data to Reveal IT's Secrets

Central and Eastern Europe

Albania
Azerbaijan
Belarus
Bosnia & Herz.
Bulgaria
Croatia
Cyprus
Czech Republic
Estonia
FYROM
Georgia
Greece
Hungary
Kazakhstan
Kyrgyzstan
Latvia
Lithuania
Malta
Moldova
Montenegro
Poland
Romania
Russia
Serbia
Slovakia
Slovenia
Tajikistan
Turkmenistan
Ukraine
Uzbekistan
Rest of CEE



Middle East/Africa

Turkey
UAE
Saudi Arabia
Kuwait
Qatar
Oman
Bahrain
Lebanon
Syria
Iran
Jordan
Israel
Rest of ME
Egypt
Morocco
Algeria
Tunisia
Libya
Ghana
Kenya
Uganda
Nigeria
Namibia
Ivory Coast
Ethiopia
Tanzania
Botswana
South Africa
Rest of Africa

- 260+ staff
- Offices in more than 21 Countries
- Research coverage of nearly 70 countries

Knowing the users across verticals



- Industry-focused units within IDC.
- More than 80 analysts WW.
- Dedicated Insights team in CEE and MEA.
- Industry experience and local knowledge.
- Understanding of IT priorities and how IT is deployed by users.
- Leveraging more than 45 years of IDC research methods and processes.



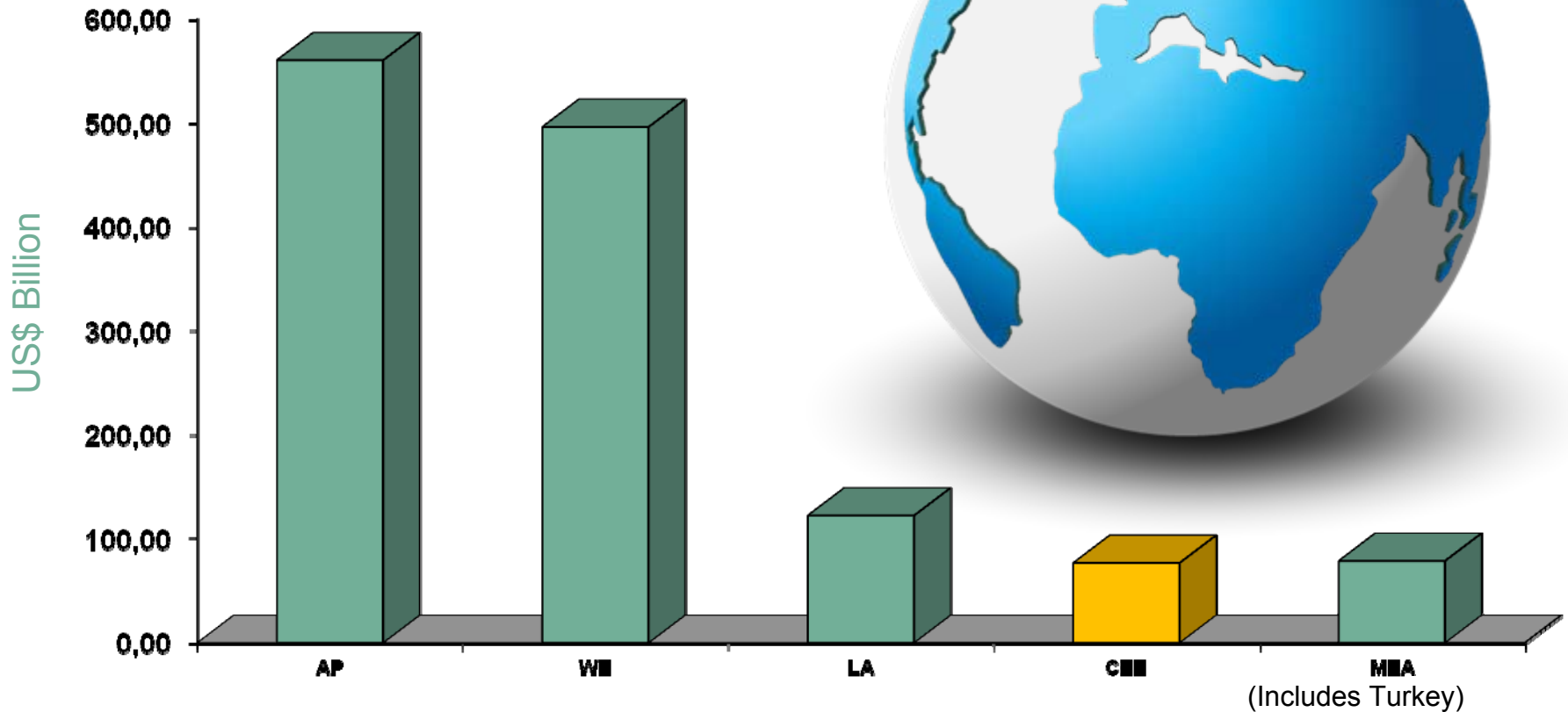
Central and Eastern Europe

Spending Context



Intro: context from the top down

Regional IT Spending – 2012

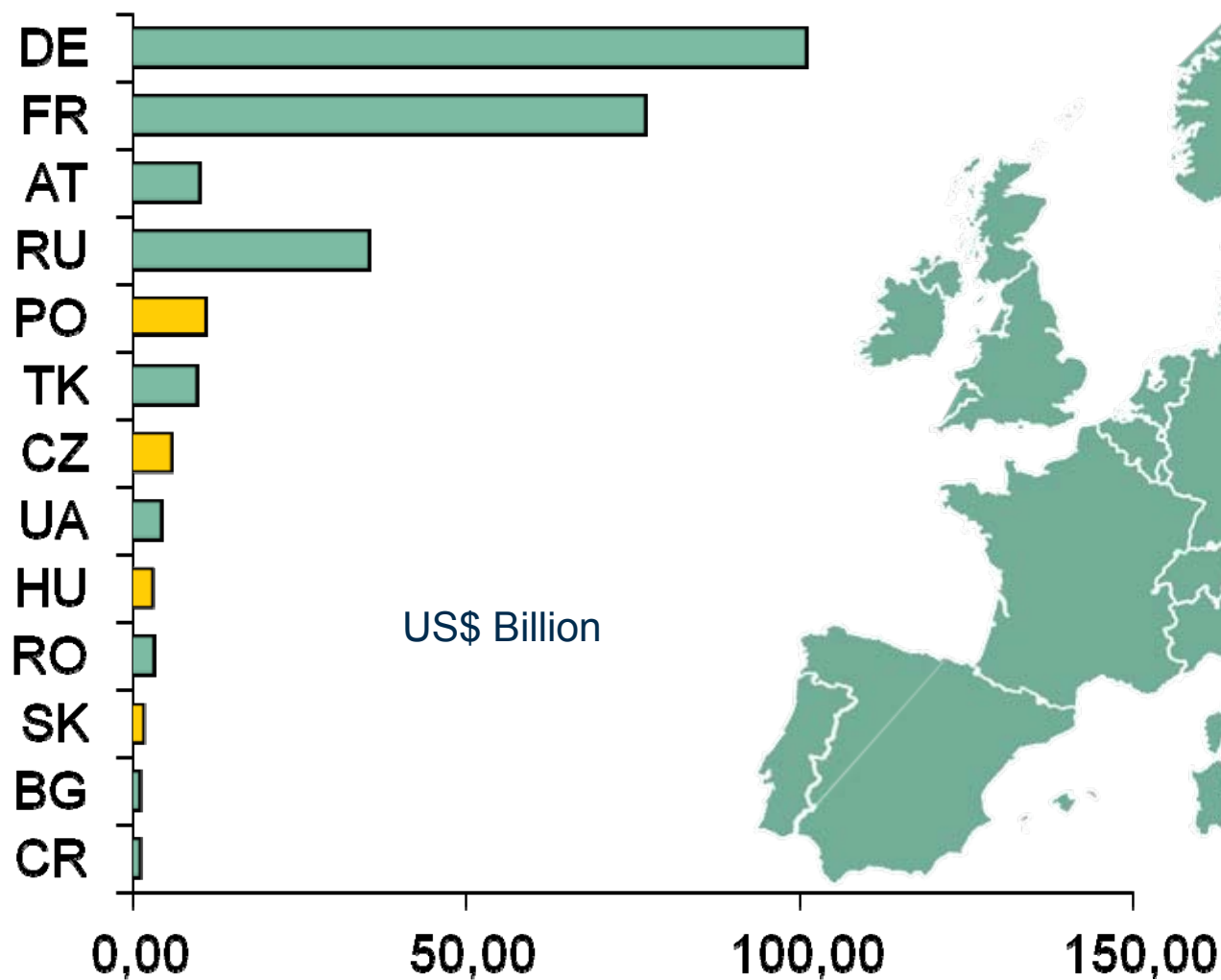


Global IT spending: USD 2 024 billion

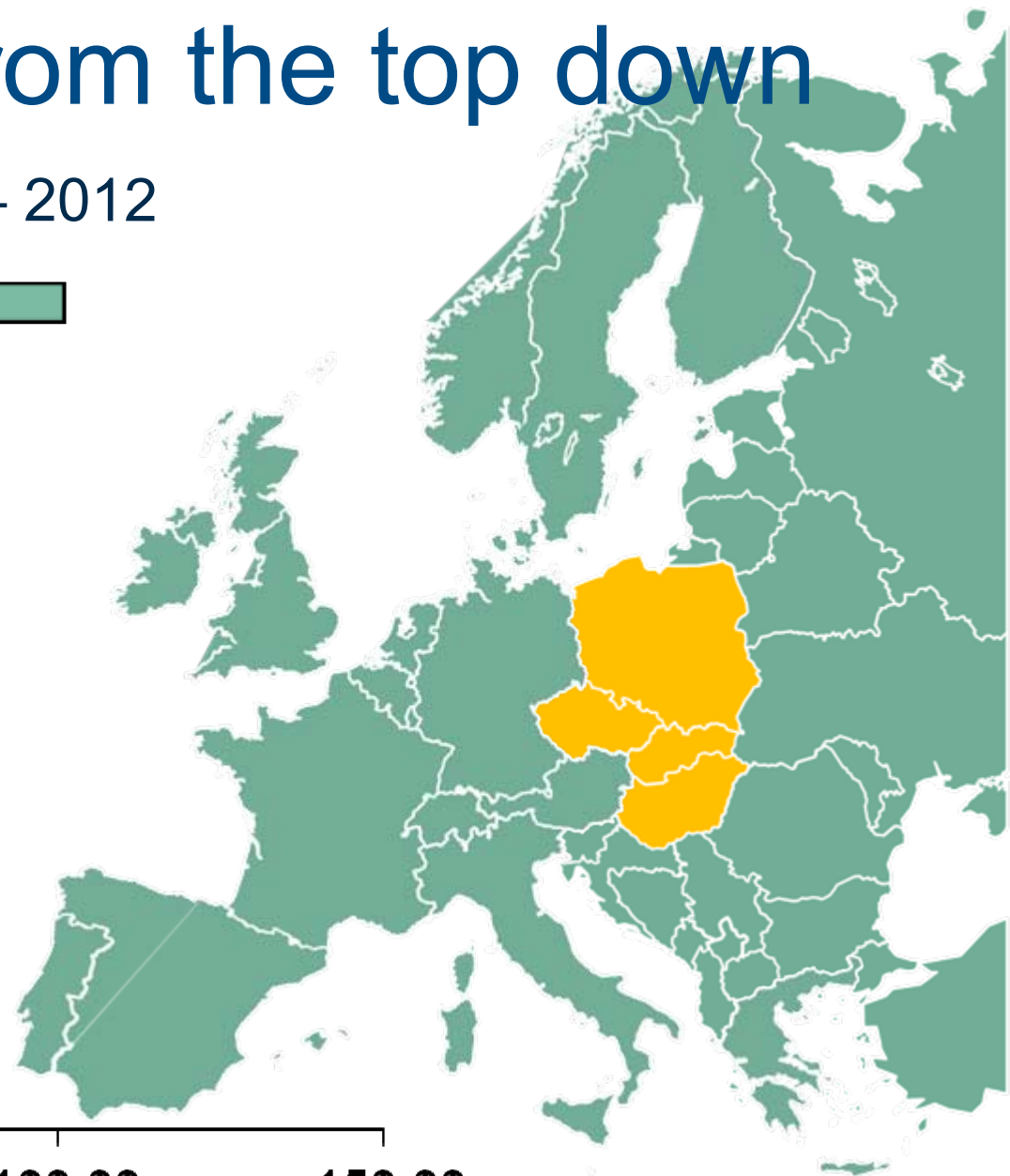


Intro: context from the top down

Regional IT Spending – 2012

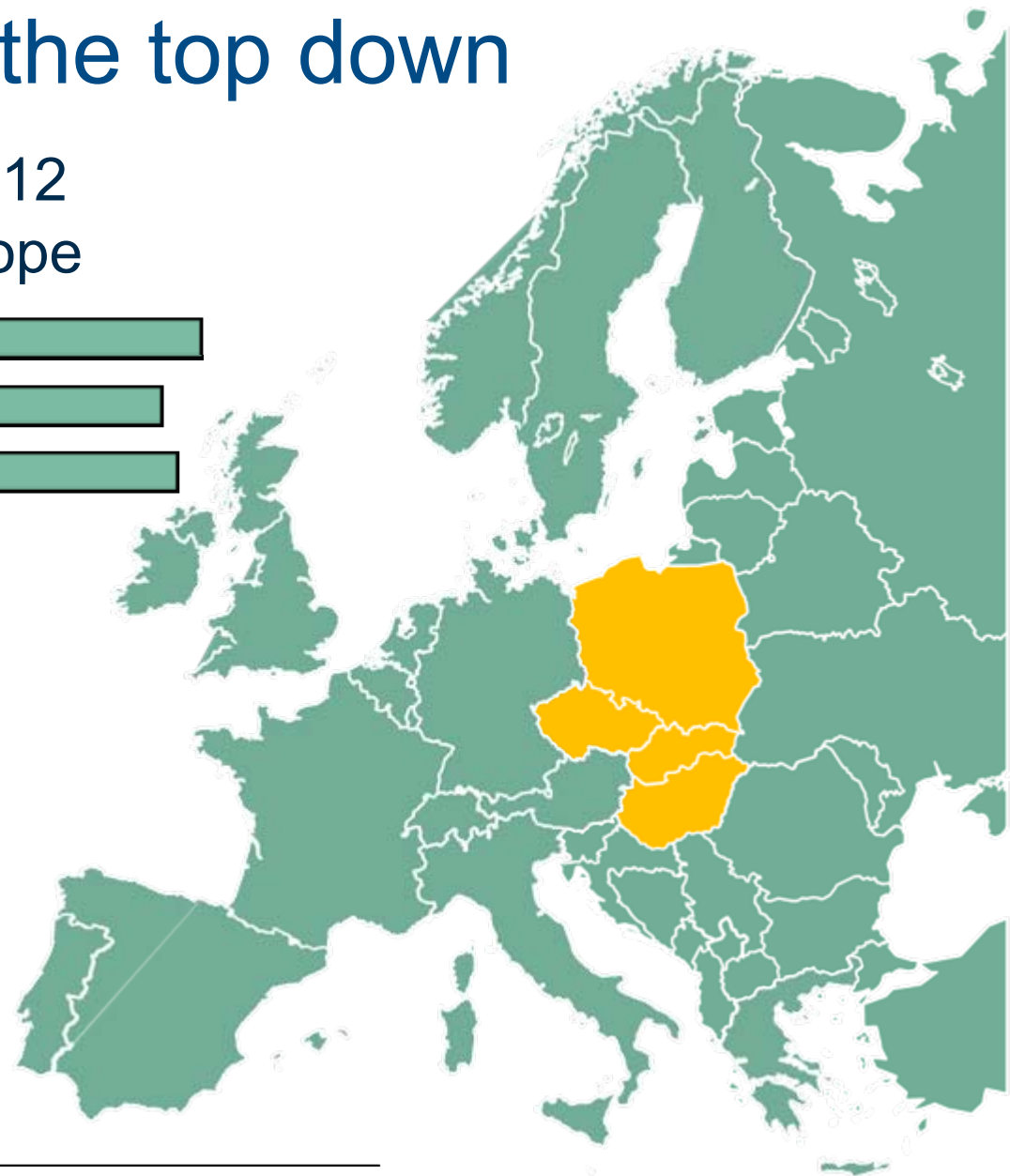
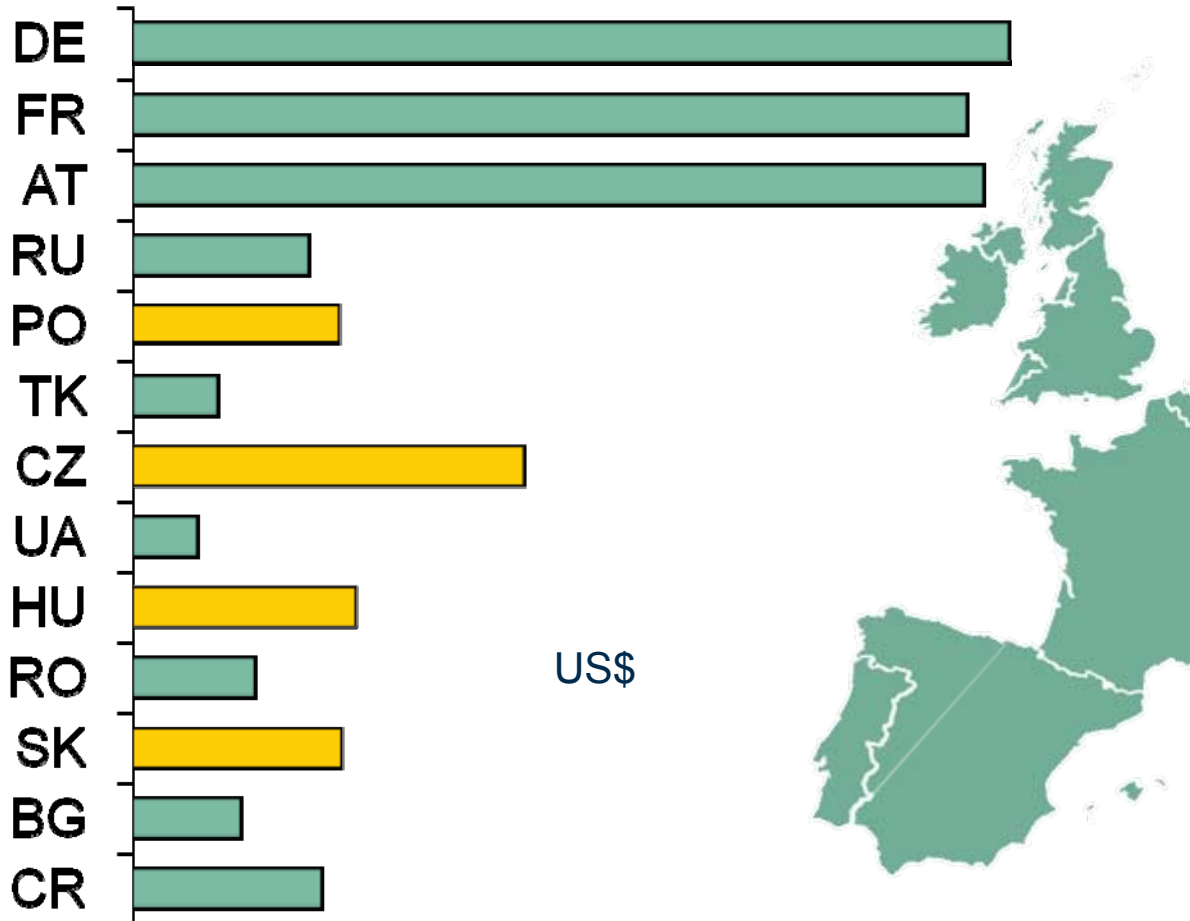


US\$ Billion



Intro: context from the top down

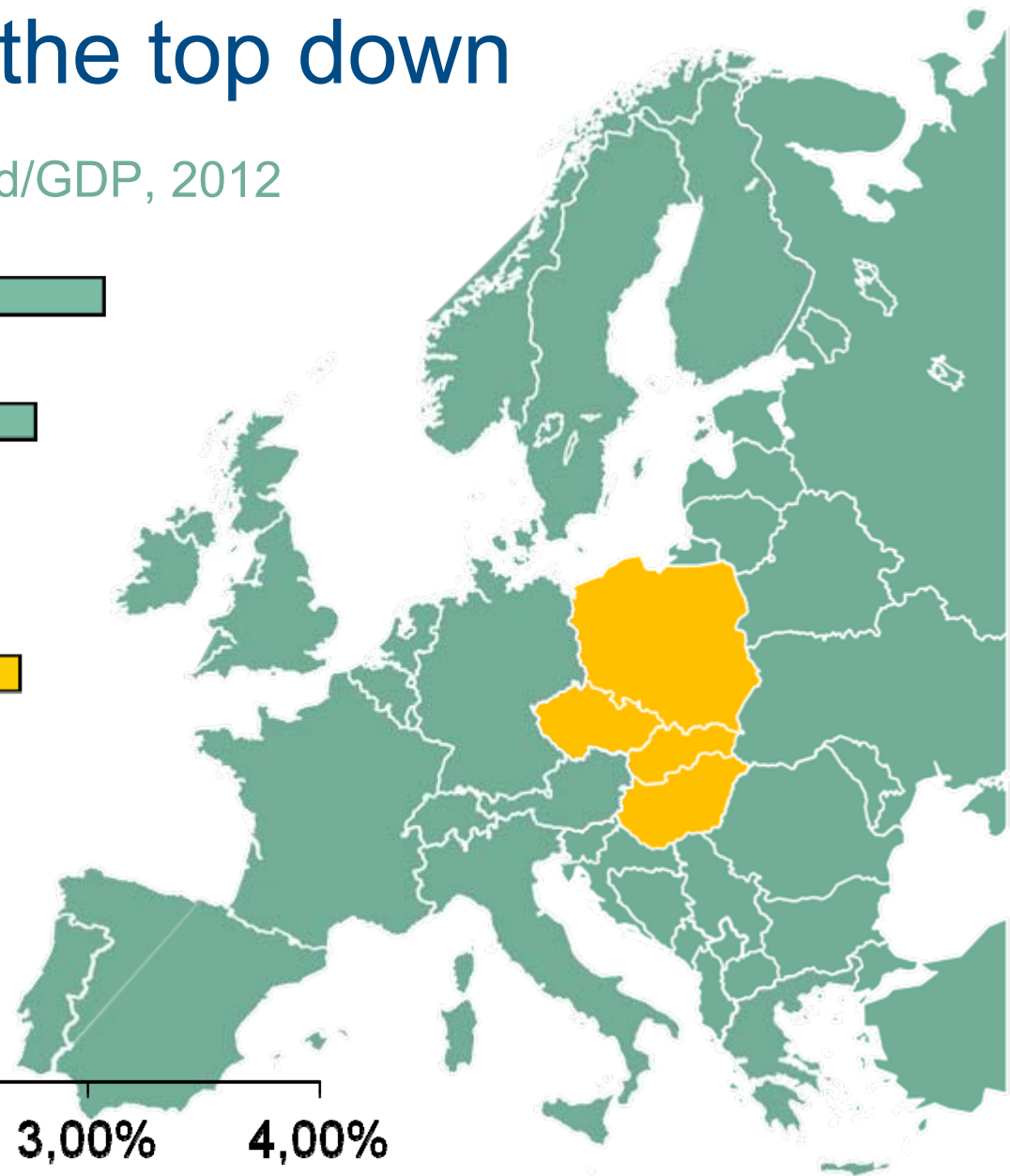
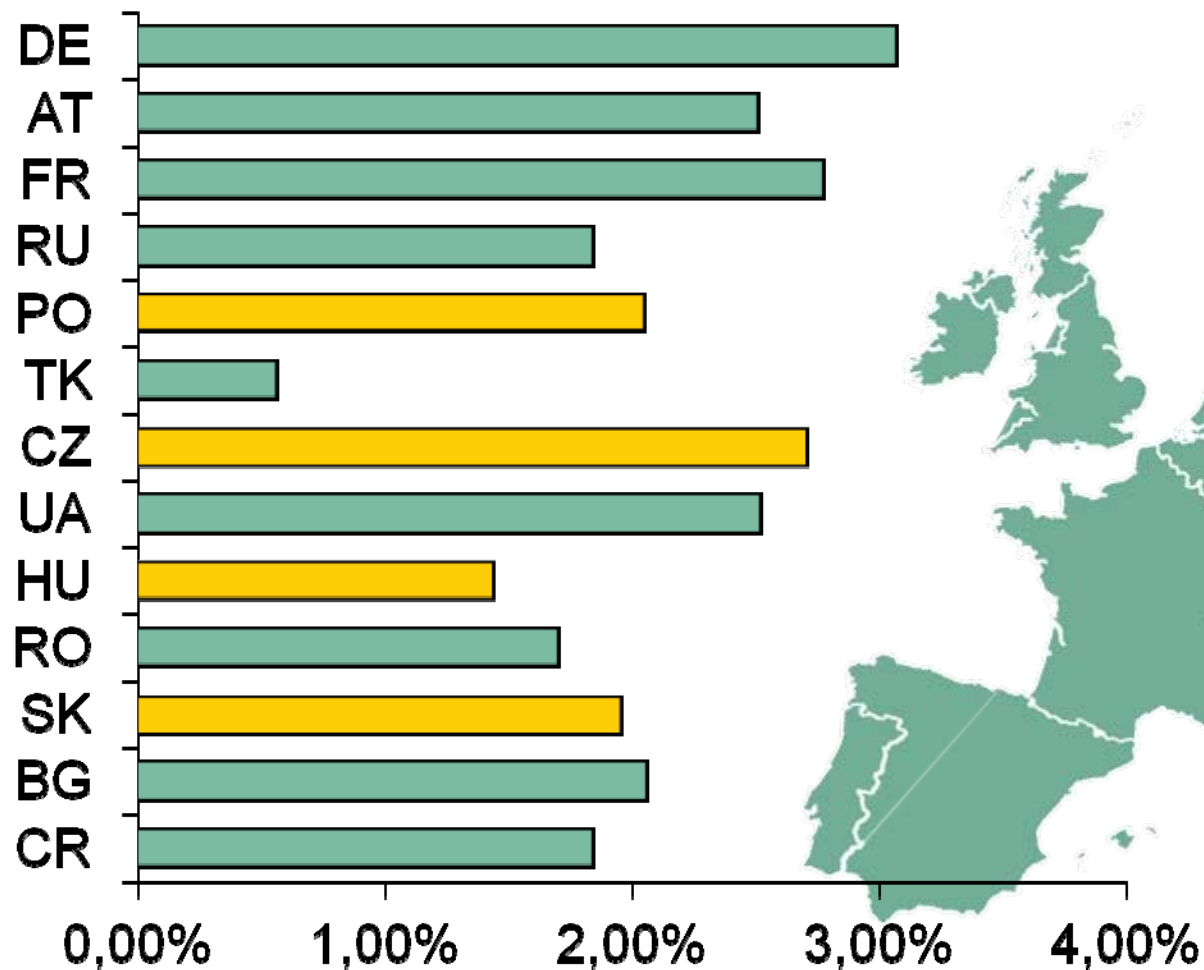
IT spend per capita – 2012
→ two-tiered Europe



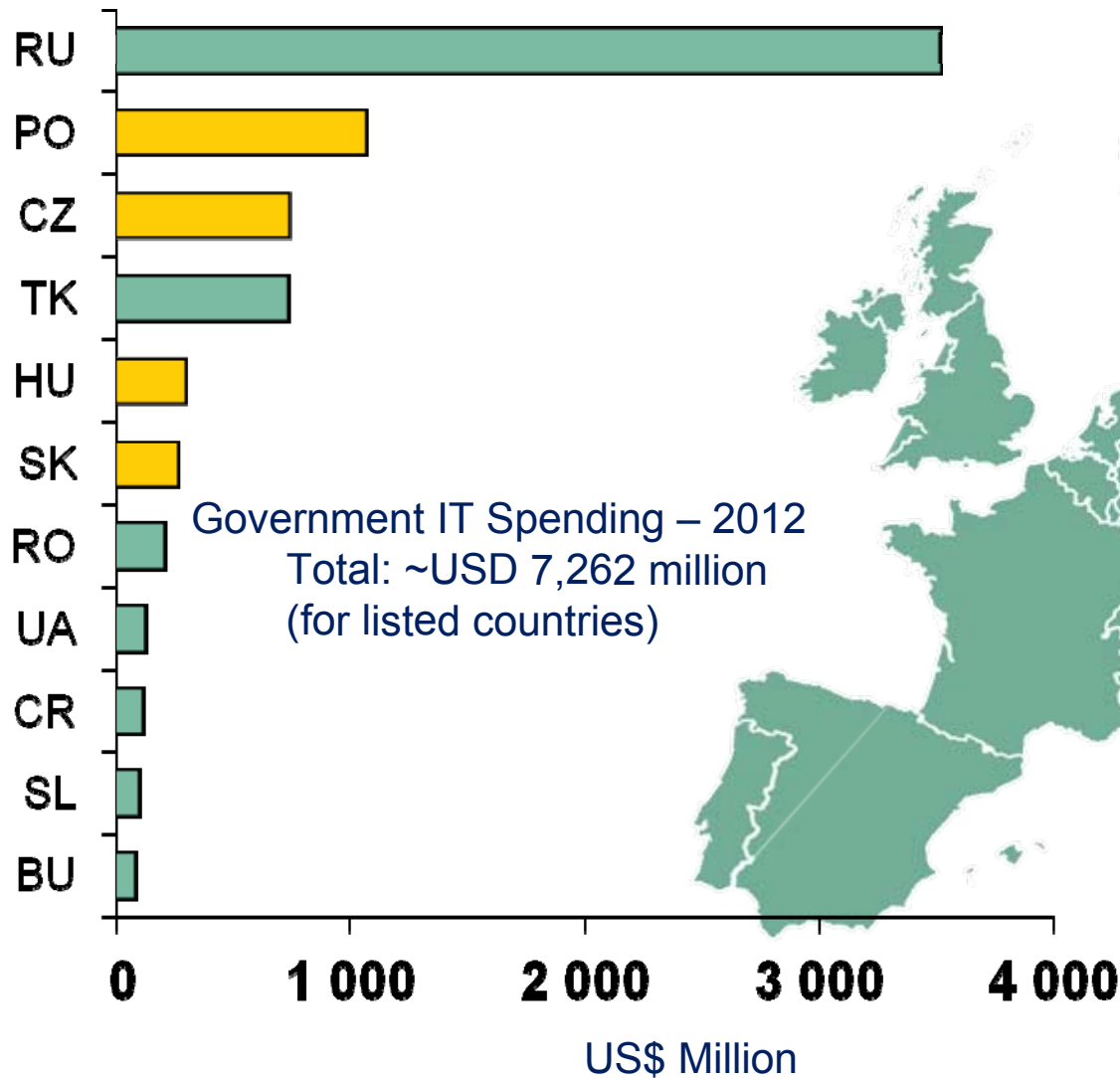


Intro: context from the top down

A bit more balanced – IT spend/GDP, 2012

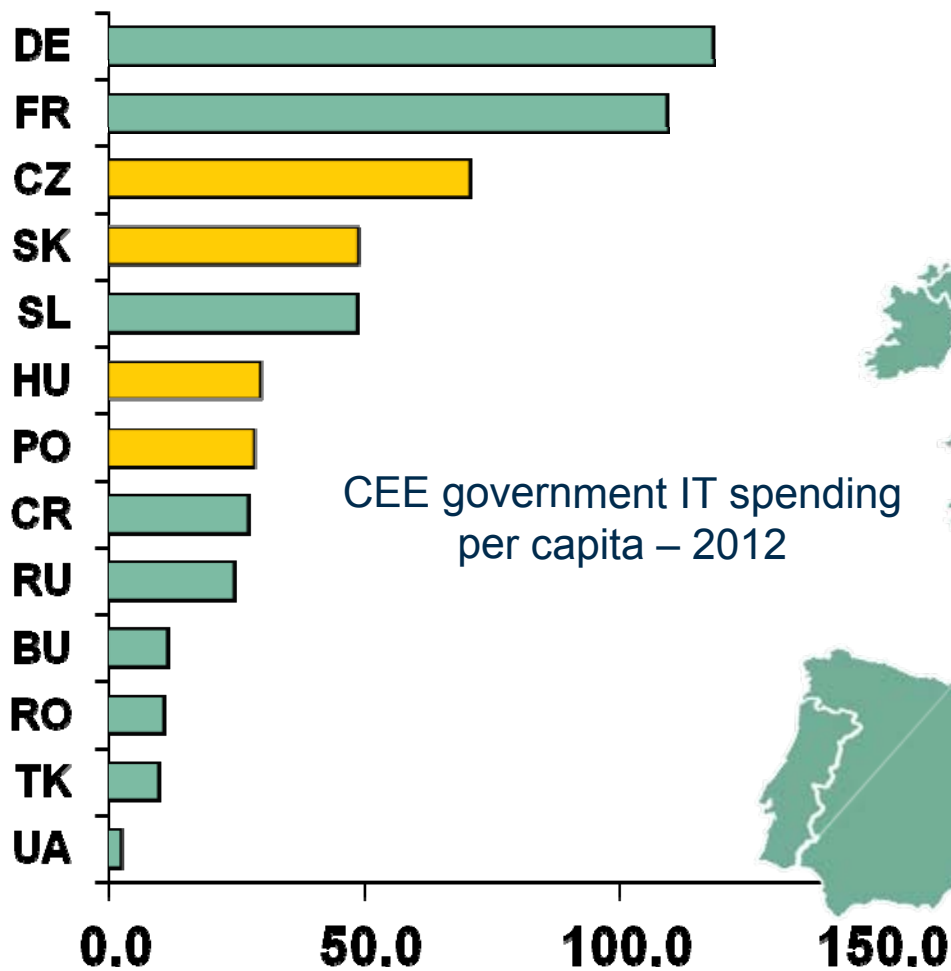


Government: CEE regional perspective





Government: regional perspective

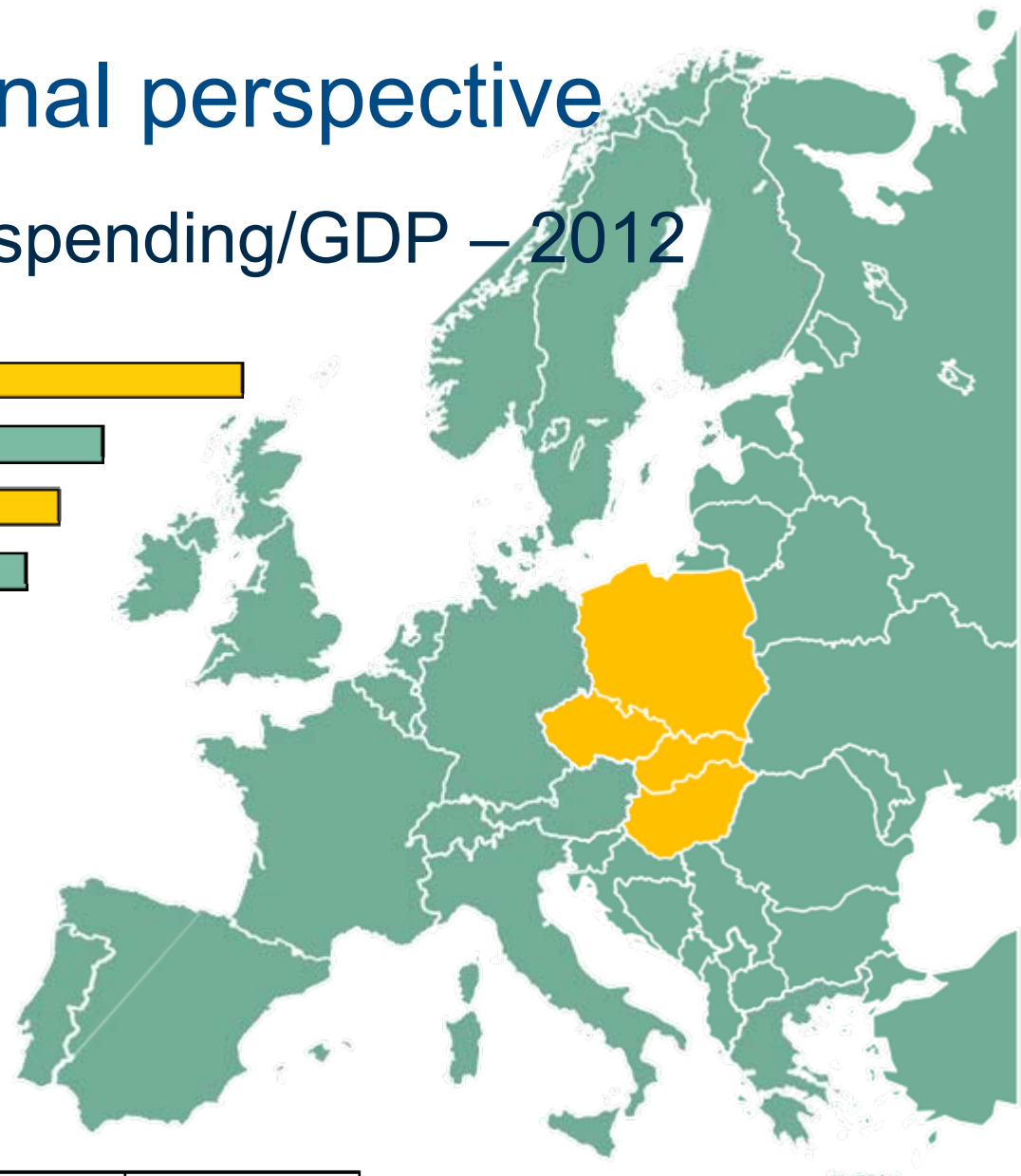
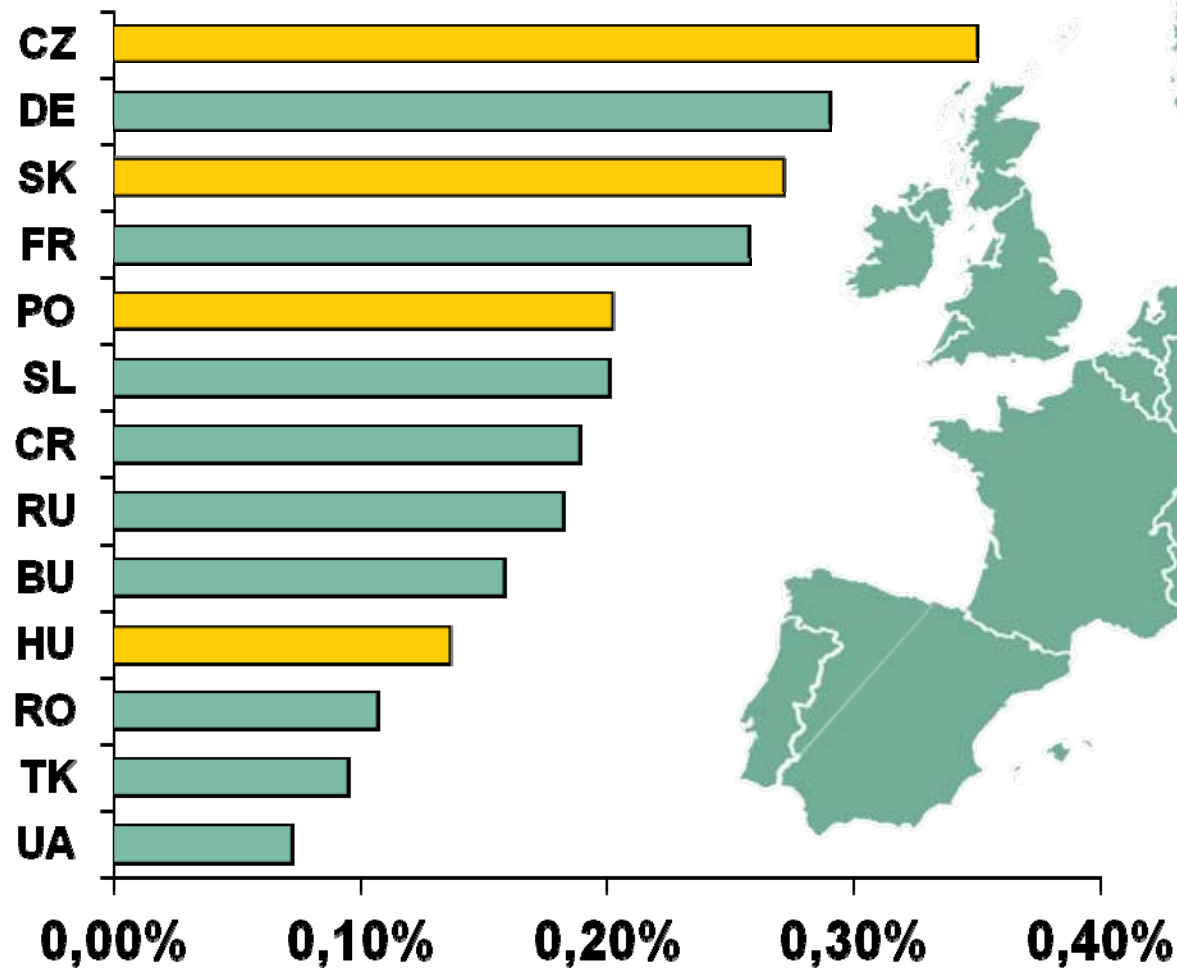


US\$

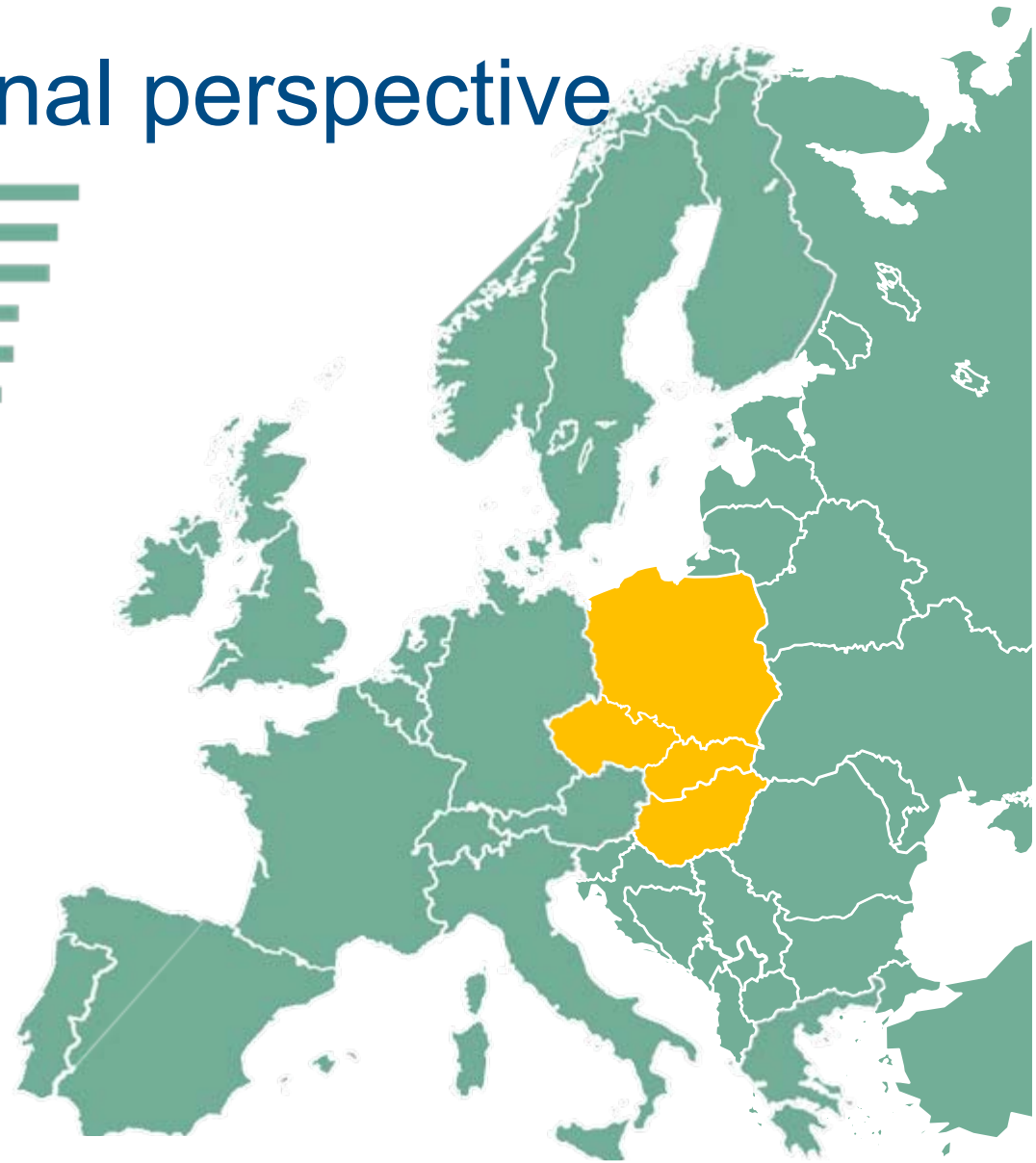
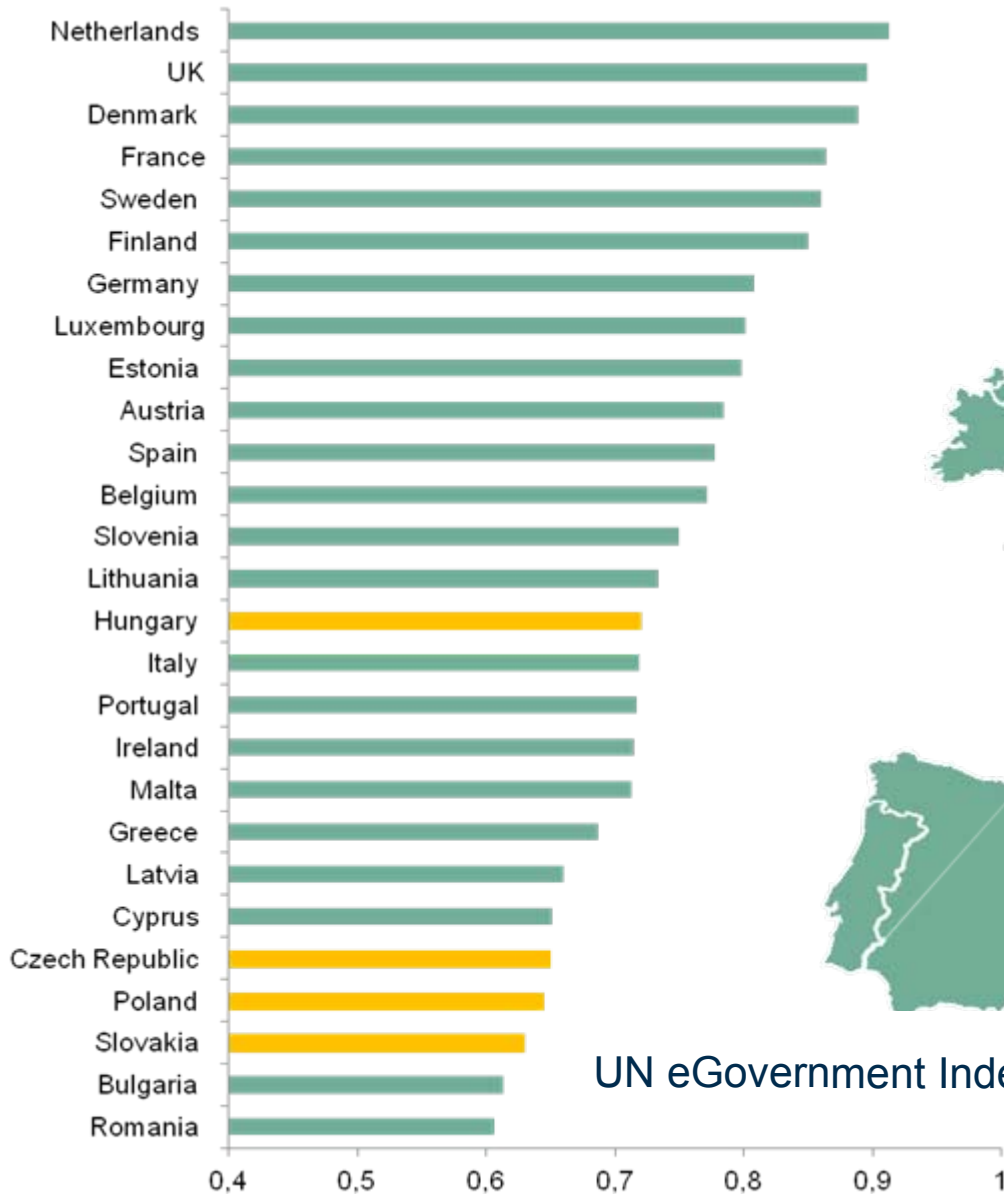
US\$

Government: regional perspective

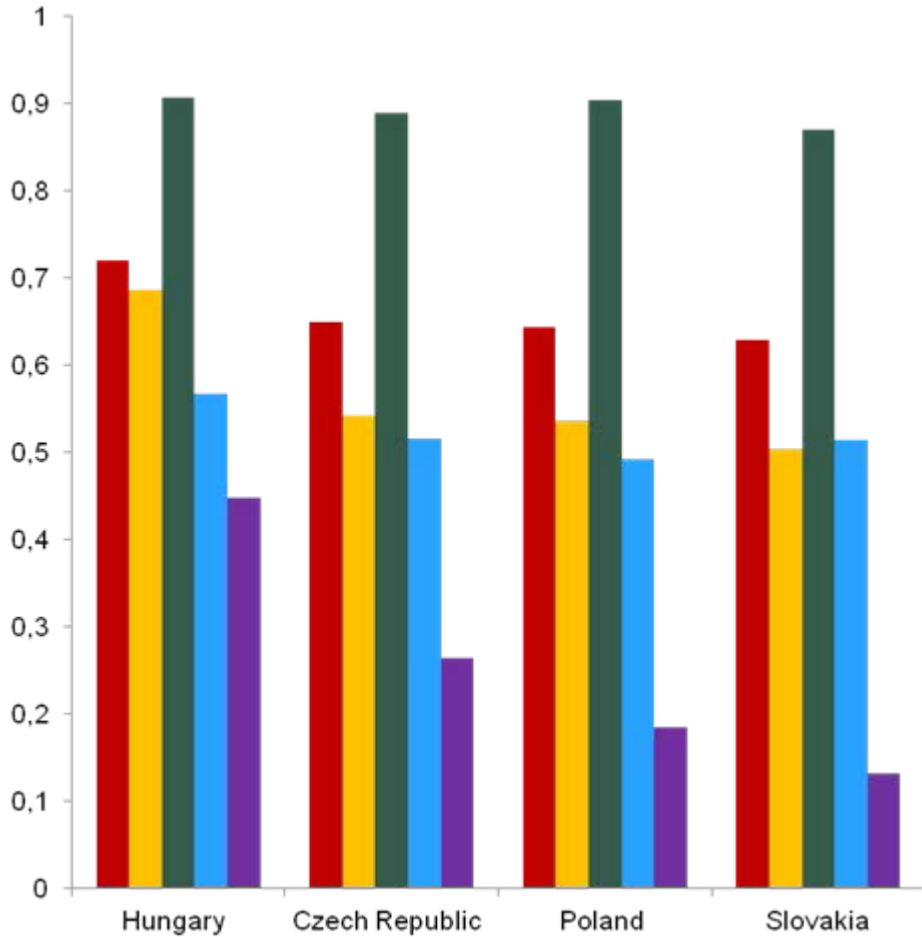
CEE government IT spending/GDP – 2012



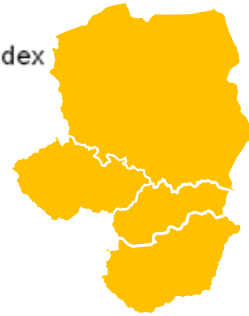
Government: regional perspective



Government: regional perspective



- E-Readiness Index
- Web Measure
- Human Capital
- Infrastructure
- E-Participation



Relative wealth at play: per capita vs GDP

Per GDP

- “Realistic” assessment of appropriate spending levels
- Catching up to WE leaders unlikely
- Greater efficiency unlikely to compensate for lower spend
- Shared/pooled resources could leverage common needs

Per Capita

- Reflective of citizen expectations of technology
- Catching up to WE leaders a possibility
- Stretches budgets in hard times (and in easy times)
- Legacy infrastructure and systems easier to handle

Central and Eastern Europe

Citizen Expectations – IT Implications



Screening: access through the window

“We are no longer people of the book, we are people of the screen”

– Kevin Kelly



→ The screen is not the channel – it provides access to the channel.

→ The channel is the portal or the entity at the other end of a task-specific screen (e.g. airport check in or POS system).

→ The screen will be the communications expectation: calling, texting, IMing, email, VoIP, web access, music, TV, film, document transfer (Databox), ticket purchase, hotel booking, etc.

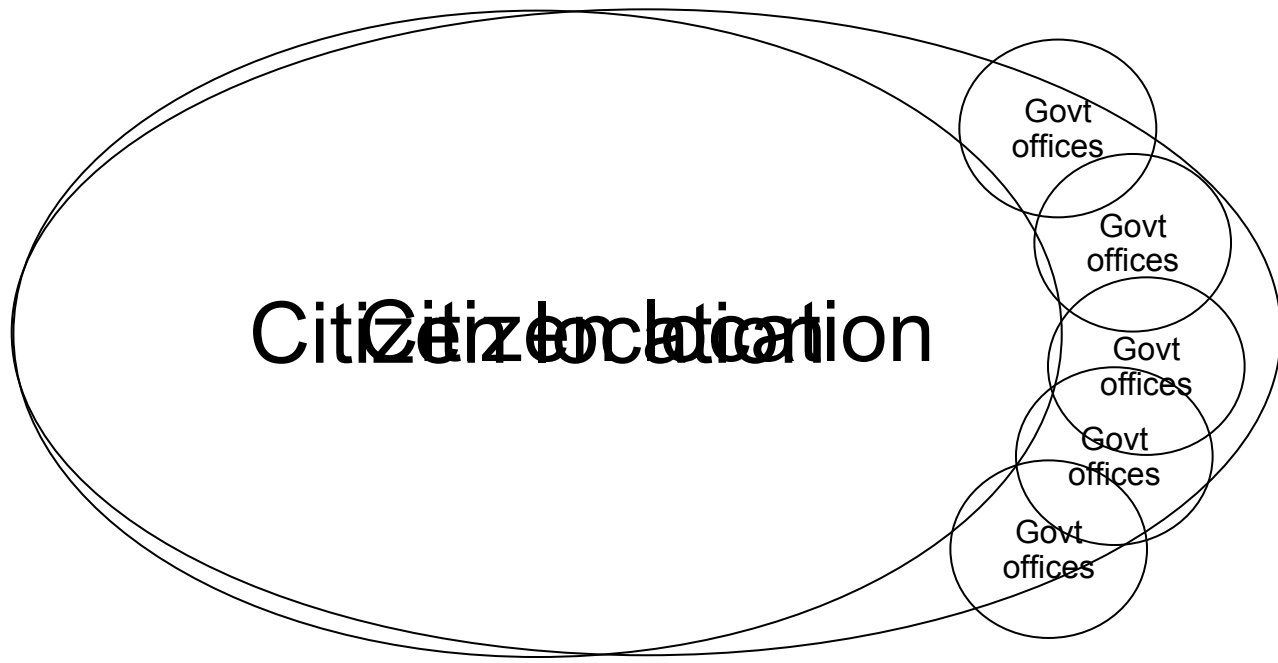
→ Access is the expectation





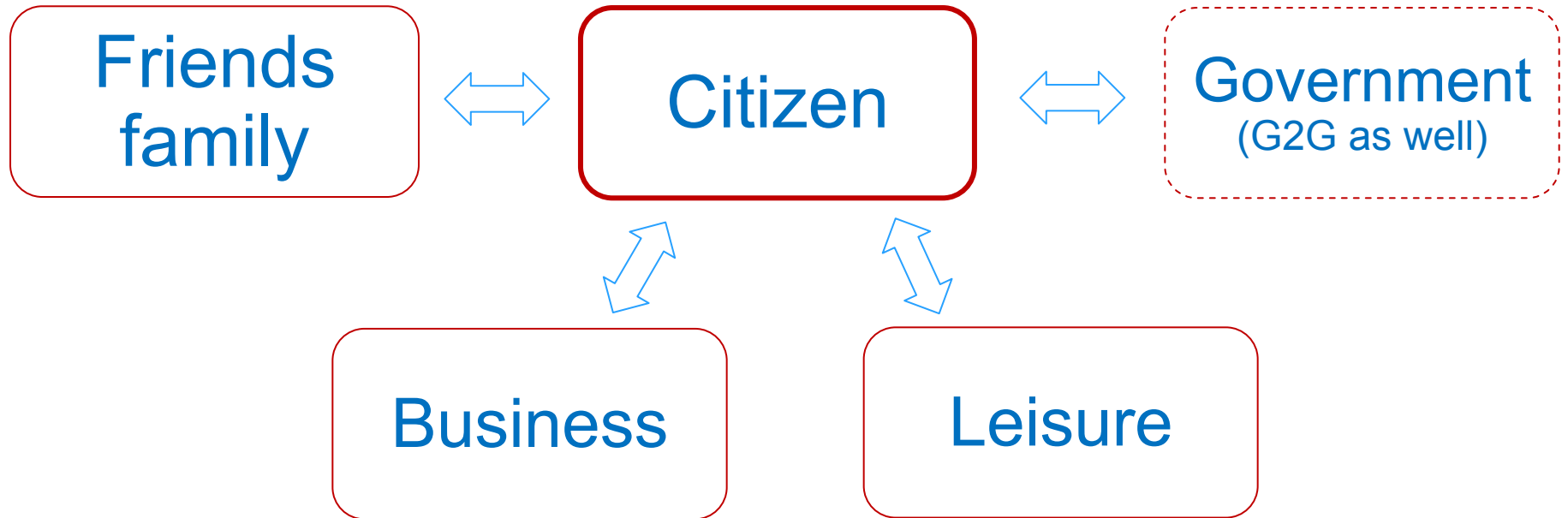
Screening: access through the window

The beauty of the screen – makes it easier to serve citizens



What else does the screen enable?

Interacting: citizens and their government



Interacting: citizens and their government

	Friends Family	Business	Leisure	Government
Email				
IM / SMS				
Facebook / Google+				
Twitter				
Website/portal				
Linked-in				
Phone / VoIP				
Other (forums, Doc solutions, etc)				

Interacting: citizens and their government

- Official documentation: taxes, licenses, social services, life events, voting, etc.
- Policy and legislative input: twitter, forums, Facebook, portals, etc.
- Community input: neighborhood improvement, state improvement, parks/trails feedback, petitions, services processes, etc.

Screens and interaction ... what else is it good for?



Predicting: easier than the weather

“Big Data” collects it all – next generation solutions puts it to use

“Everything” collected

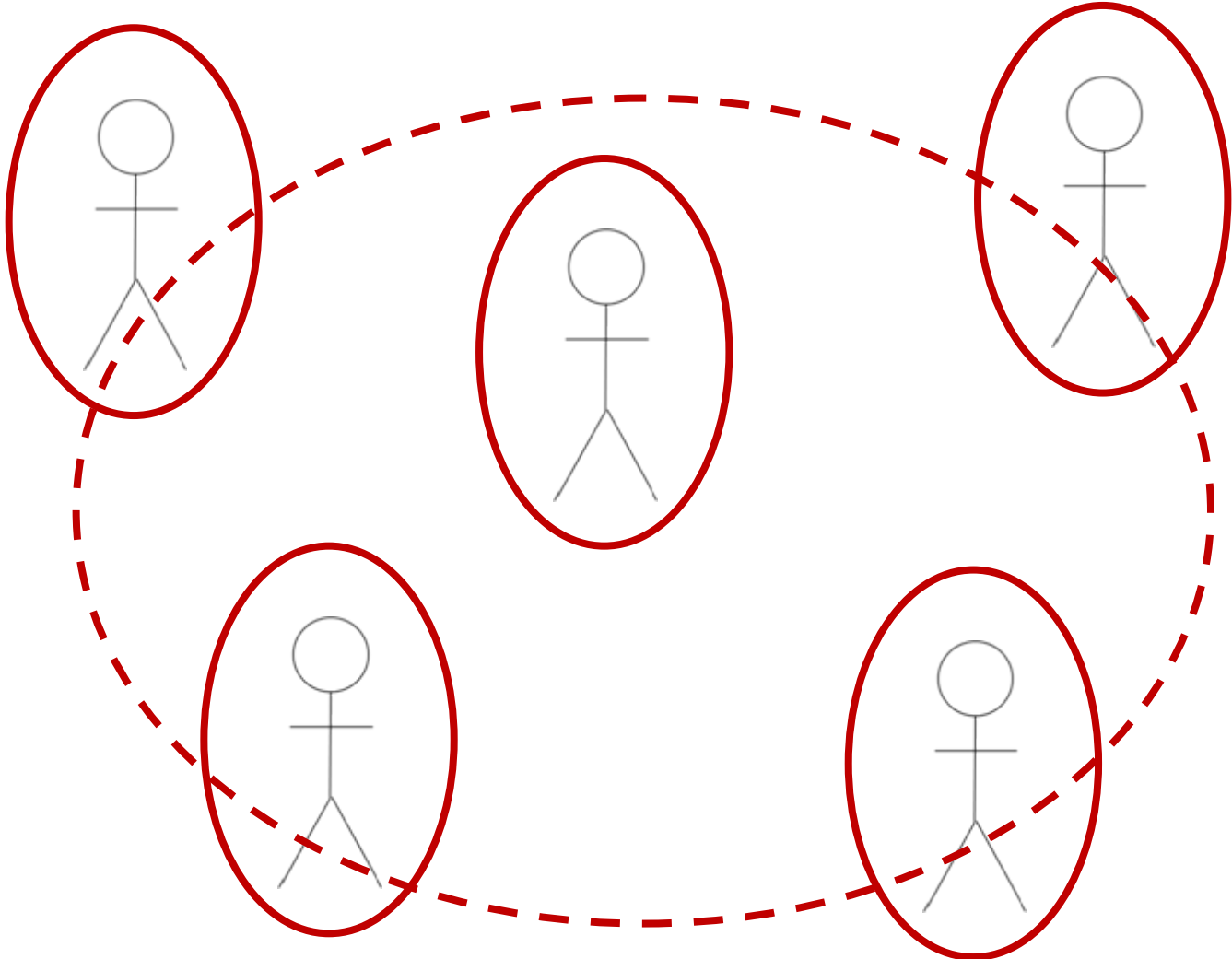
- Service use times, dates, lengths, locations, demographics, etc
- Offices contacted, when, why, primary issues, staff, etc
- Web and portal visit data, form use, downloads, primary media, preferred media, etc
- Social media likes, retweets, etc
- Opinions, comments, feedback, threads, email content, etc

To answer questions

- Who needs a service? When do they need it? Why do they need it? Where do they need it?
- Where are repairs, improvements, new services, etc needed?
- What kinds of policies and processes will benefit the most citizens?
- How can citizens become participants in government?



Working together



Next steps for benefits all around

Create or use a ready-made smart government maturity model for planning

A framework with an established set of IT goals that charts every decision will help ensure rapid progression. Goals likely to include:

Increase citizen participation in government

Engage public to enhance decision buy-in and increase public participation.

Create information transparency in government

Utilize technology to put information about agency decisions and operations online and in forums available to the public.

Collaborate across government entities

Utilize innovative tools, methods, and systems to cooperate at all levels of government and engage the public in the work of their government.

Continue to centralize resources and shift towards common platforms

Push managers, directors, deputy ministers to create IT services and resources centers within the government.

Incorporate citizen expectations into all tenders

As a layer over any IT planning, be sure managers, directors, deputy ministers create IT services and resources that speak to access/screening, interacting, and predicting.

For more information

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