

Digitalisation and digital policies in SEE

SEEDIG 2018 Survey

Conducted in preparation for the 4th SEEDIG annual meeting

23–24 May 2018 | Ljubljana

About the survey

Why and how?

- u The purpose of this survey was to try to capture the perception of the Internet community in South Eastern Europe and the neighbouring area (SEE) on aspects related digitalisation and digital policies across the region.
- u It covers topics such as the region's readiness for the digital economy, digital skills, Internet neutrality, cybersecurity, digital rights, and data-driven technologies.
- u The survey was conducted online, in April – May 2018, by South Eastern European Dialogue on Internet Governance (SEEDIG). The results served as input into the 4th SEEDIG annual meeting, held on 23–24 May 2018, in Ljubljana.

Key findings (1)

- u Countries in SEE are only 'somewhat prepared' to embrace the opportunities of **digitalisation** and digital technologies, according to the majority of survey respondents.
- u Among the **top priority areas that countries should focus on to be able to better take advantage of the opportunities of digitalisation**, most respondents indicated digital literacy (70%), addressing the digital divide (68%), and supporting innovation and market growth (62%).
- u These areas were also identified as the **most common challenges in SEE**, together with tackling the risks posed by hate speech, extremist content online, and the spread of disinformation (60%), ensuring cybersecurity and combating cybercrime (51%), and protecting human rights online (51%).
- u **Regional cooperation** could significantly help tackle these challenges, according to almost half of the respondents.

Key findings (2)

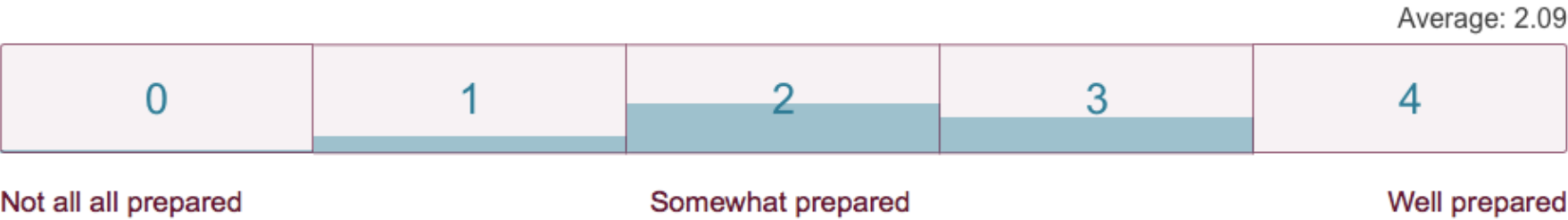
- u Specific legislation/regulation is the most effective approach to ensure **network and platform neutrality**, according to 67.9% of the respondents. Market competition (17%) and self-regulation (13.2%) were found to be less effective.
- u There is room for improvements when it comes to what stakeholders in SEE are doing to enforce and protect **digital rights**. A majority of respondents indicated that stakeholders' efforts in this area were sufficient 'to some extent' when it comes to protecting freedom of expression and children rights online, but only 'sufficient to a limited extent' in the case of privacy and data protection, gender rights online, and rights of persons with disabilities.
- u There is a general feeling of lack of trust in the efficiency of national **cybersecurity** frameworks. Overall, 32% of the respondents indicated they were satisfied with the national frameworks 'to a limited extent', 26% only 'to some extent', and 25% 'not at all'. Data protection, end-users themselves, lack of strategies, and limited awareness and education were indicated as some of the main cybersecurity-related challenges in SEE.

Key findings (3)

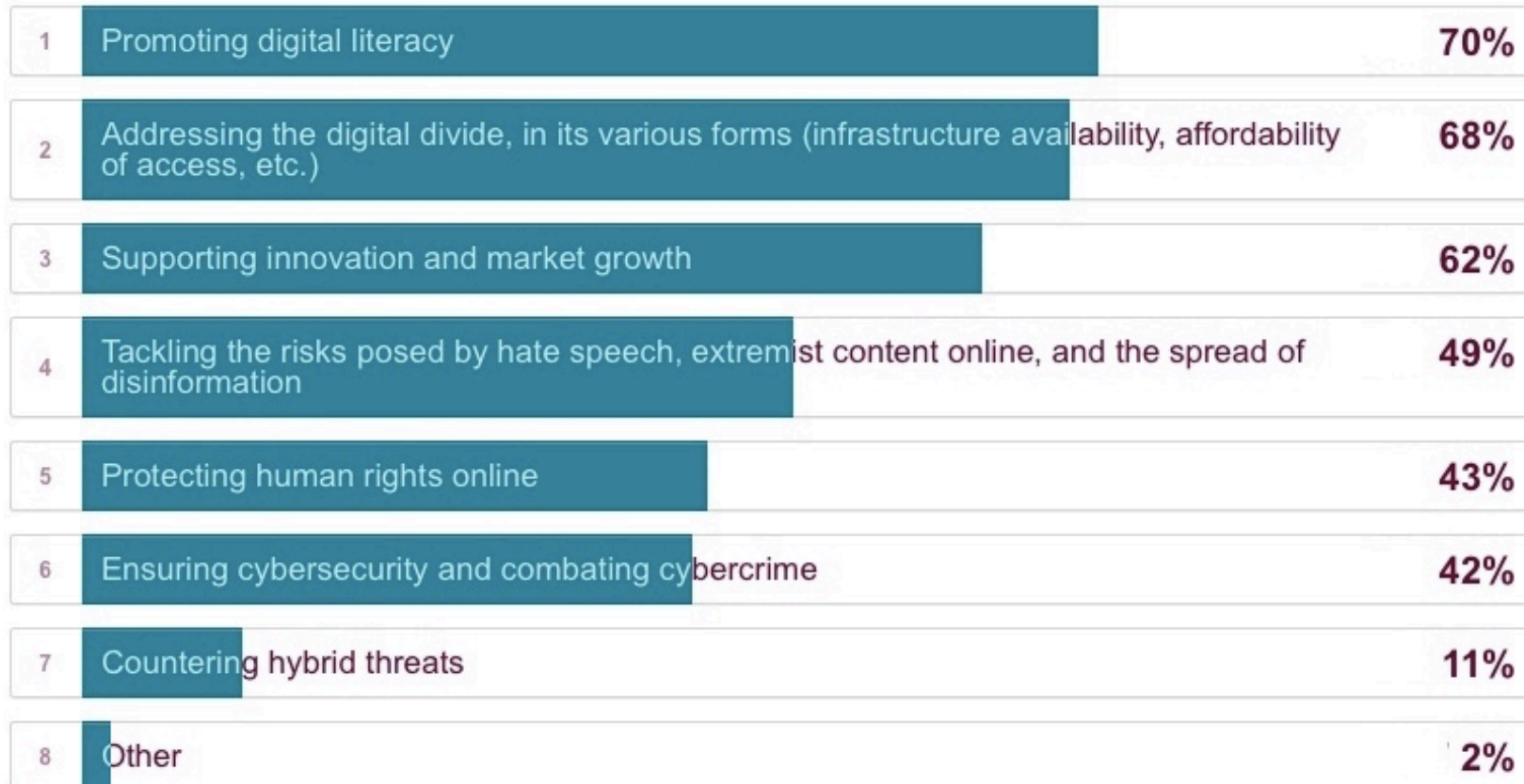
- u Government and individuals themselves share the primary responsibility for advancing **digital literacy**.
- u A proper balance can be achieved, at least to some extent, between protecting users' rights to **privacy and data protection** and the development of the **digital economy**, according to most survey respondents.
- u **Ethics and human rights** considerations were identified as the main challenge associated with advancements in the field of robotics, automation, and artificial intelligence (66%), followed by the impact on the jobs market (60%) and safety and security of automated systems (60%). Privacy and data protection (75%) and cybersecurity (70%) were indicated as the main challenges associated with **Internet of Things** devices.
- u All in all, SEE countries can take advantage of the opportunities offered by data-driven technologies if they focus on **education** (77%) and support **innovation and research and development** in these areas (64%).

1. Digitalisation: opportunities and challenges

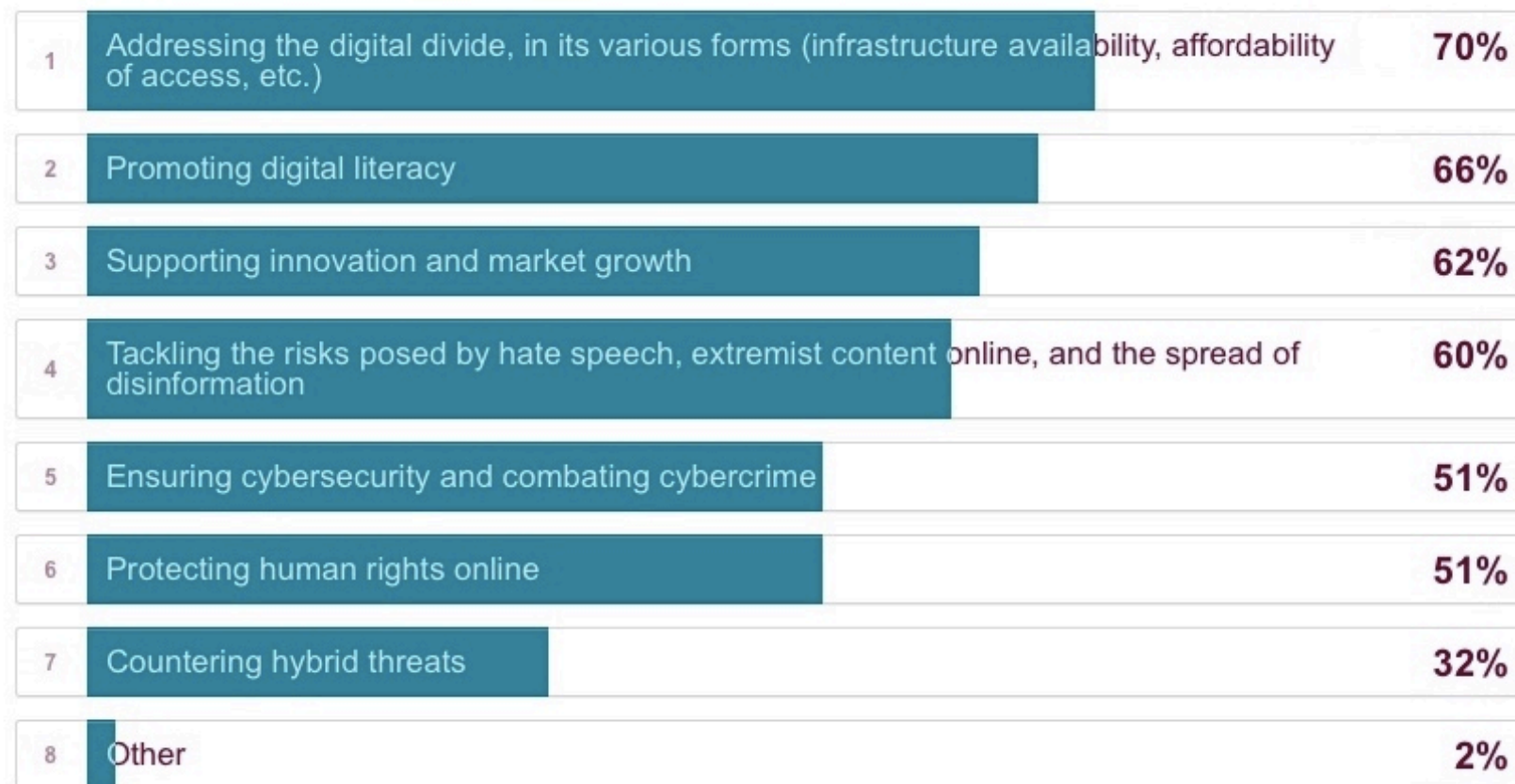
1.1. How prepared would you say your country is to embrace the opportunities of digitalisation and digital technologies?



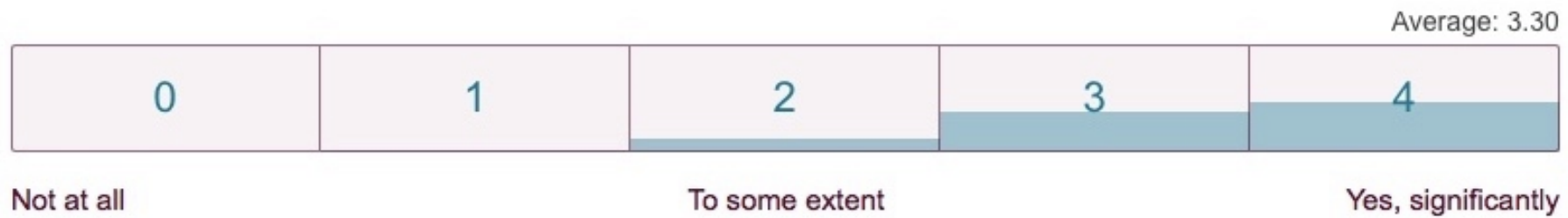
1.2. What priority areas should your country focus on to be able to better take advantage of the opportunities of digitalisation?



1.3. What common challenges do the countries in SEE face in the process of digitalisation?



1.4. Could regional cooperation (among countries and among different stakeholders) help tackle the challenges identified above in a more effective and efficient manner?



1.5. Examples of successful regional cooperation in addressing challenges related to digitalisation

In place

SEE Digital Summit

SEEDIG

Eastern European
Partnership (digital
economy)

DiploFoundation and DCAF
projects on promoting
cybersecurity culture

Balkan Digital
Highway Initiative

Suggested

Working groups to
collaborate on addressing
legal and practical issues

Sharing of
experiences

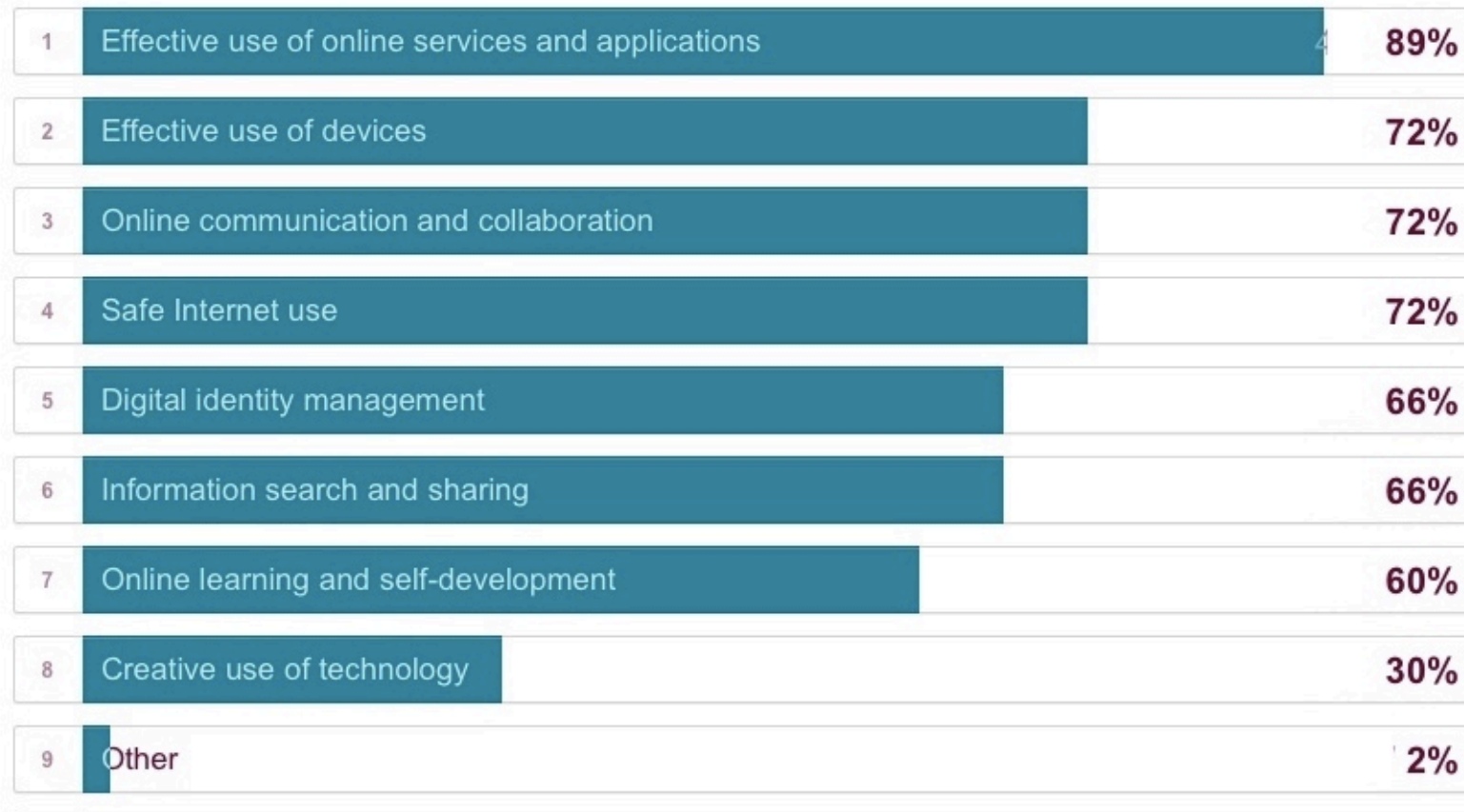
Regional e-services
platforms

2. Digital skills

2.1. How important is digital literacy today compared to conventional literacy and numeracy?



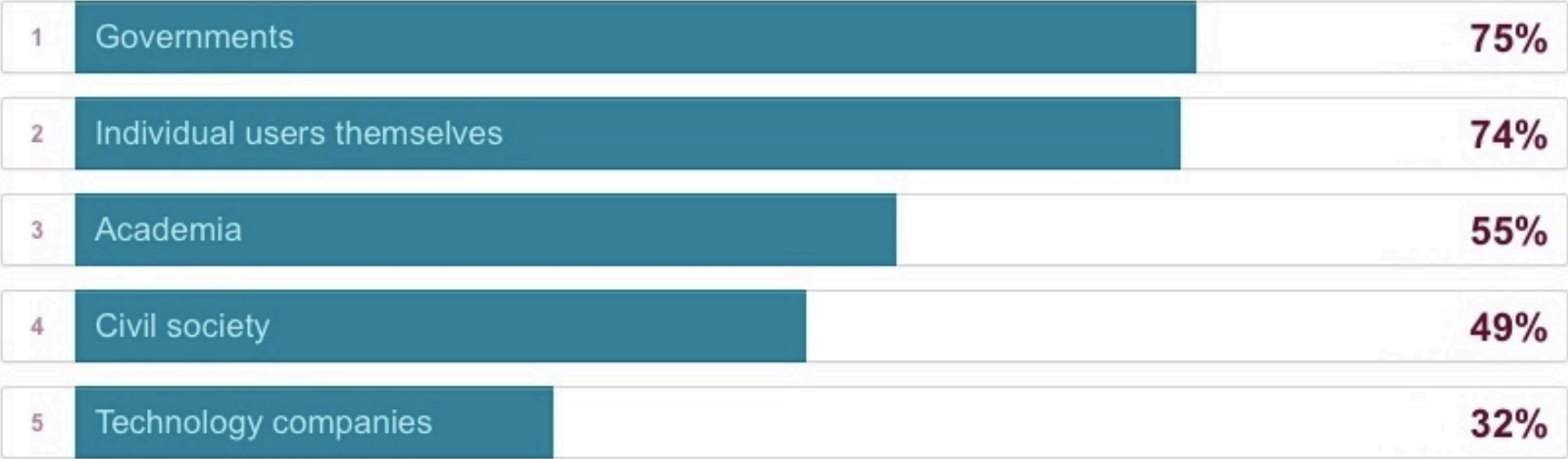
2.2. What competencies are covered by the term 'digital literacy'?



2.3. How would you assess your digital literacy and readiness?

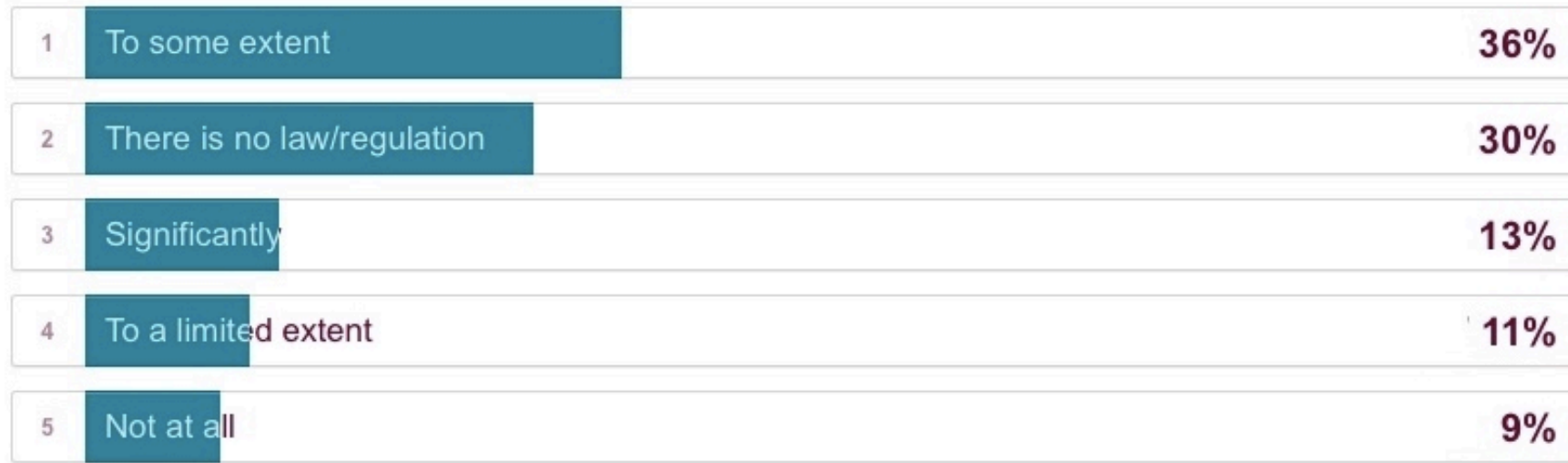


2.4. Who bears the highest responsibility for advancing individual digital literacy?

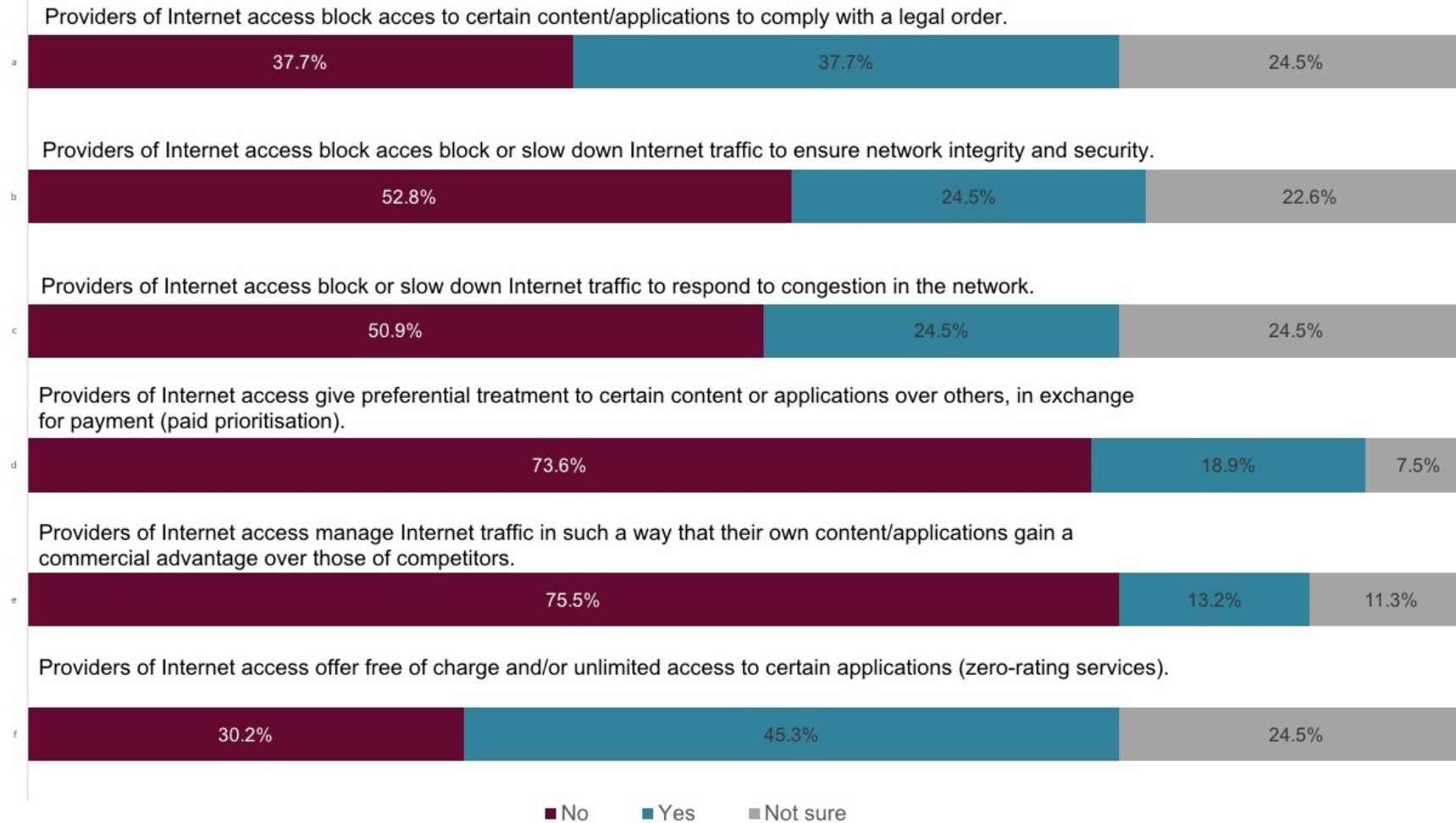


3. From network to platform neutrality

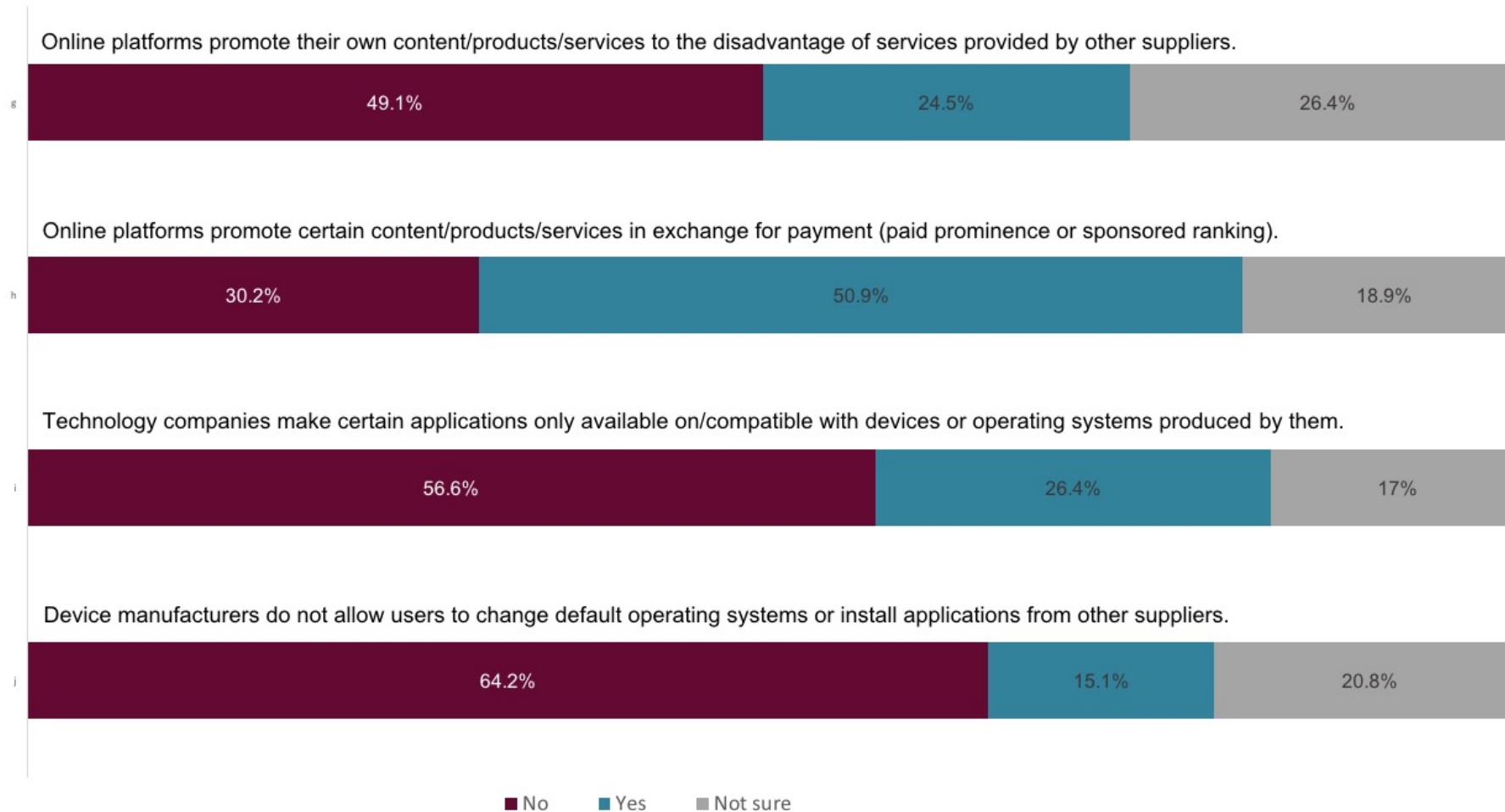
3.1. If network neutrality is protected by law/regulation in your country, how effective is the enforcement of these rules?



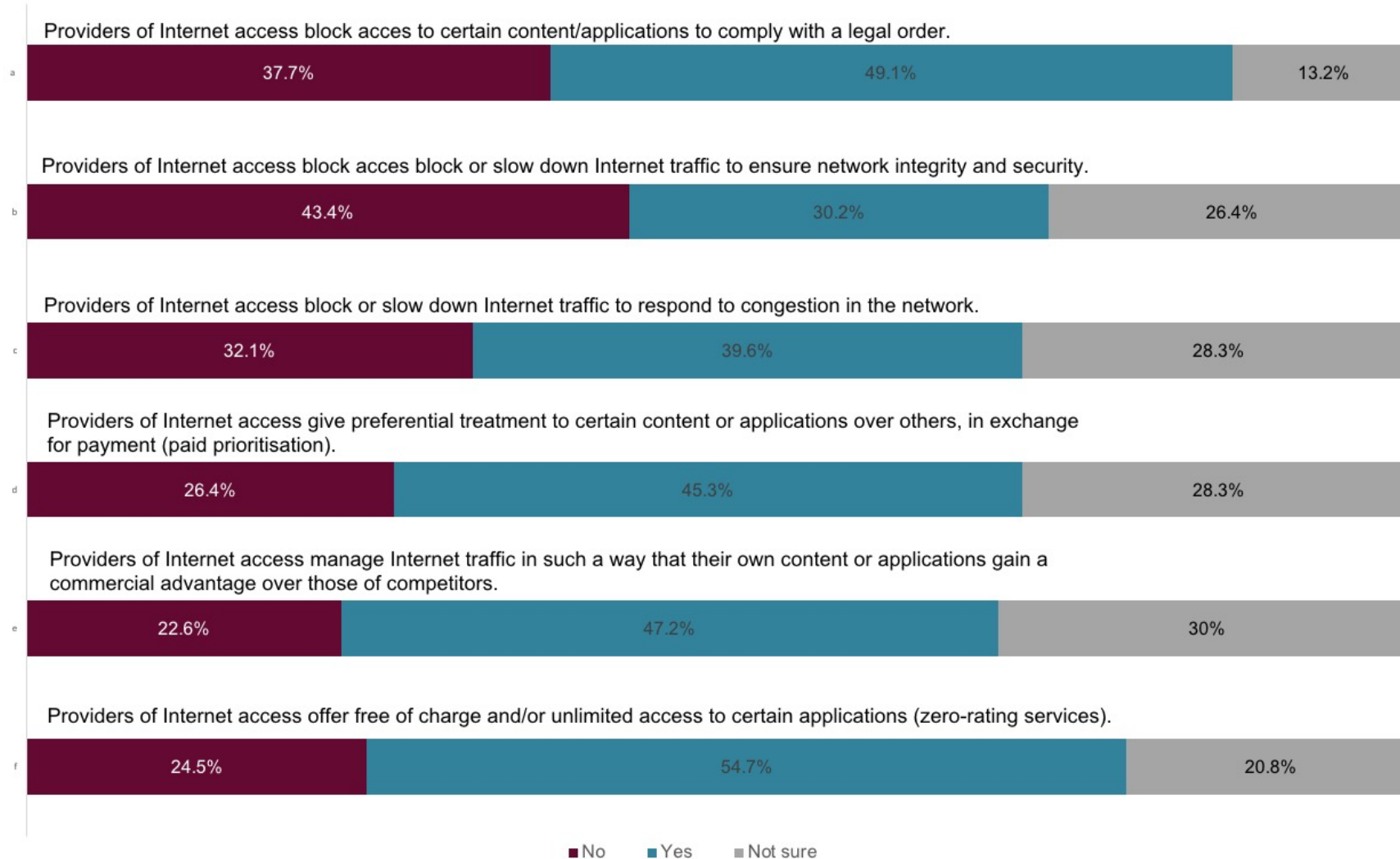
3.2. As a user of digital technologies, do you consider the practices below to be acceptable?



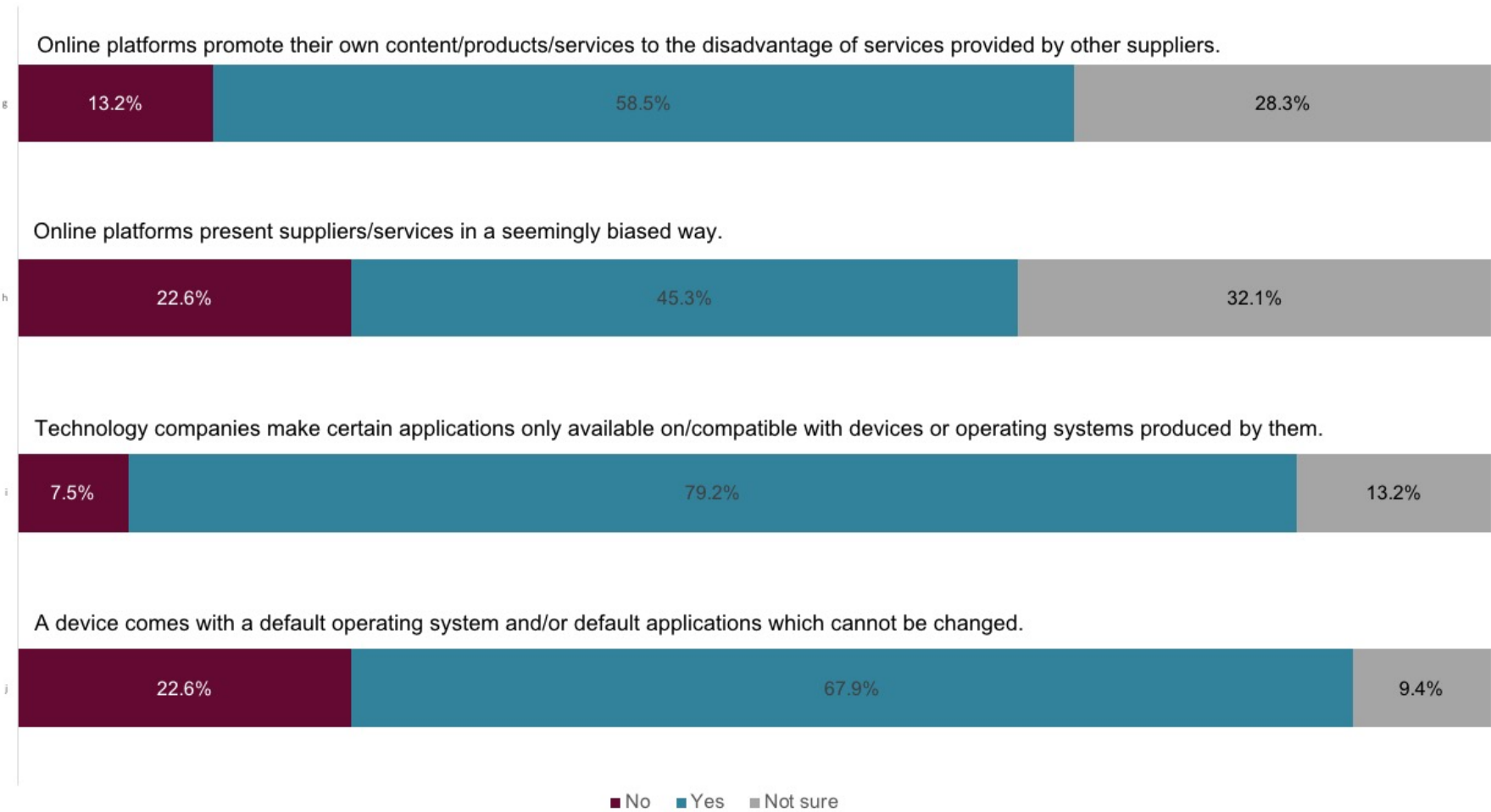
3.2. As a user of digital technologies, do you consider the practices below to be acceptable? (cont.)



3.3. As a user of digital technologies, have you experienced any of the following practices?



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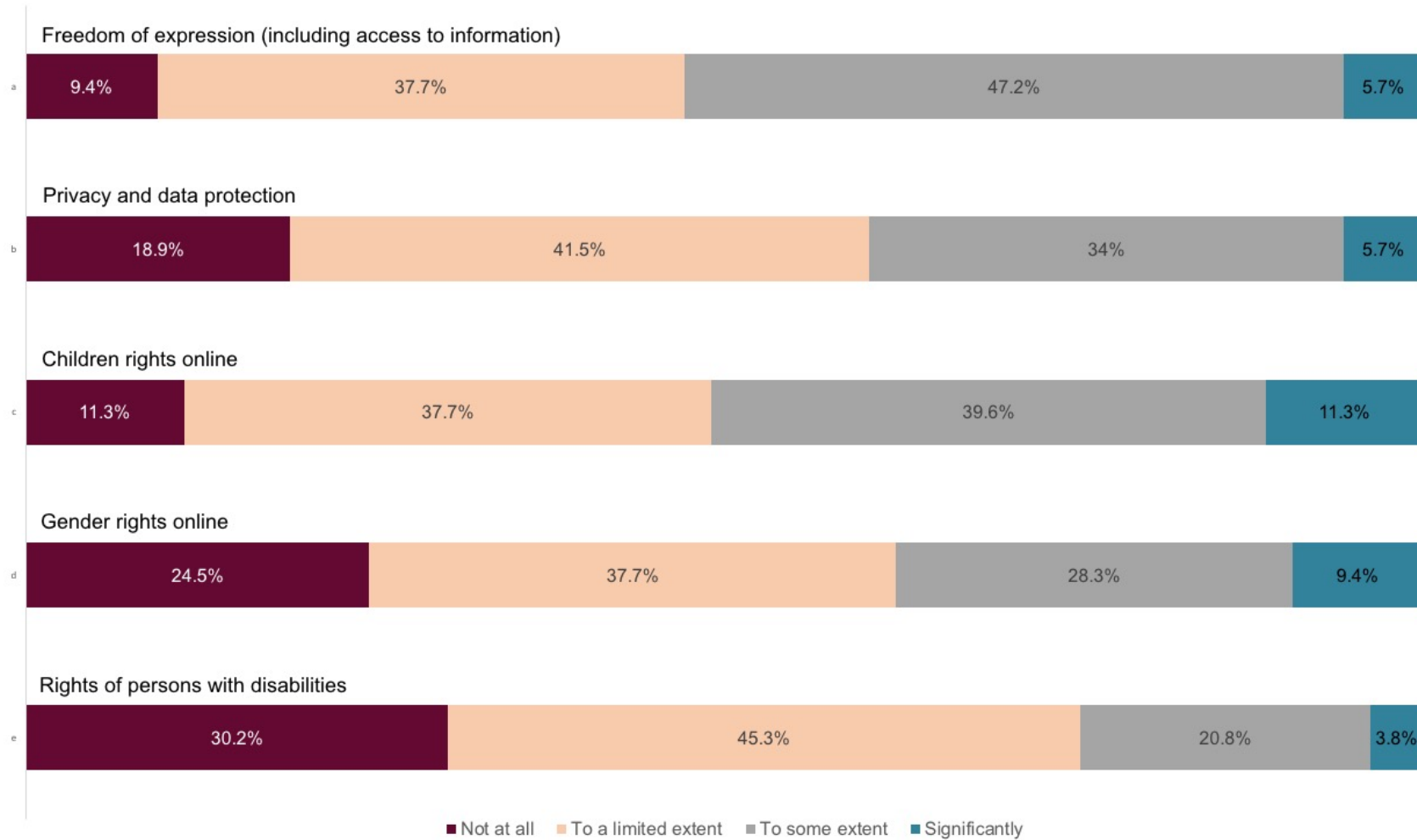


3.4. What would be the most effective approach to ensure network and platform neutrality?



4. Digital rights: awareness and enforcement

4.1. Do you consider that stakeholders in SEE are doing enough to enforce and protect the following digital rights?



4.2. What are the main challenges to ensuring a better protection of digital rights in your country and in SEE?



Insufficient
regulation

4.3. In your view, in which circumstances can freedom of expression (including access to information) be limited online?



Criminal
content

4.4. How can we best deal with the challenges and risks associated with the use of digital technologies by children?



4.5. Would you say that your government has taken steps to implement gender-responsive ICT policies (e.g. policies which include targets or plans to improve women's access and digital skills)?



Examples of gender-responsive ICT policies

Girls in IT Day

New legislation on digital rights, including gender rights

Participation in Global Network of Women in ICT, support to women's business in ICT through programmes of start-up and innovative loans, a special programme for training and re-training women into the ICT sector.

5. Cybersecurity

5.1. Whose primary fault is it for the occurrence of cybersecurity incidents and cybercrime acts such as data breaches, hacking, and ransomware?



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Others responsible

Multiple stakeholders.
Cybersecurity is
everyone's
responsibility.

Criminals
Hackers

We can not talk about a specific fault. The Internet was established as an open technology platform. On the one hand, this represents an exceptional opportunity for innovation and development; on the other hand, it brings a number of security risks.

Crime will always
exist, it has just
expanded to digital
space.

Neglecting the importance of updating the systems being used by everyone mentioned. Vendors also have their responsibility in placing in the market products that lack security mechanisms.

Human behavior on
all sides, when the
Internet becomes
mass media.

5.2. How satisfied are you with your country's cybersecurity framework (strategies, legislation, dedicated institutions, etc.)?



5.3. What is the main cybersecurity-related challenge in SEE?



5.4. How important are the following issues when it comes to cybersecurity priorities in the SEE regional context?

End-user awareness and cyber hygiene

Average: 3.51



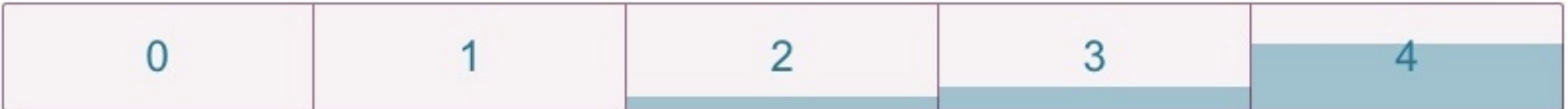
Child protection online

Average: 3.51



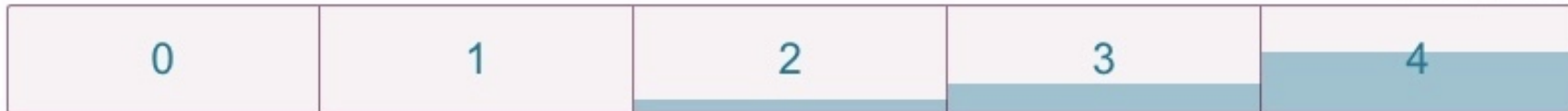
Harmonised legislative and regulatory frameworks

Average: 3.47



Protection of critical (information) infrastructures

Average: 3.42

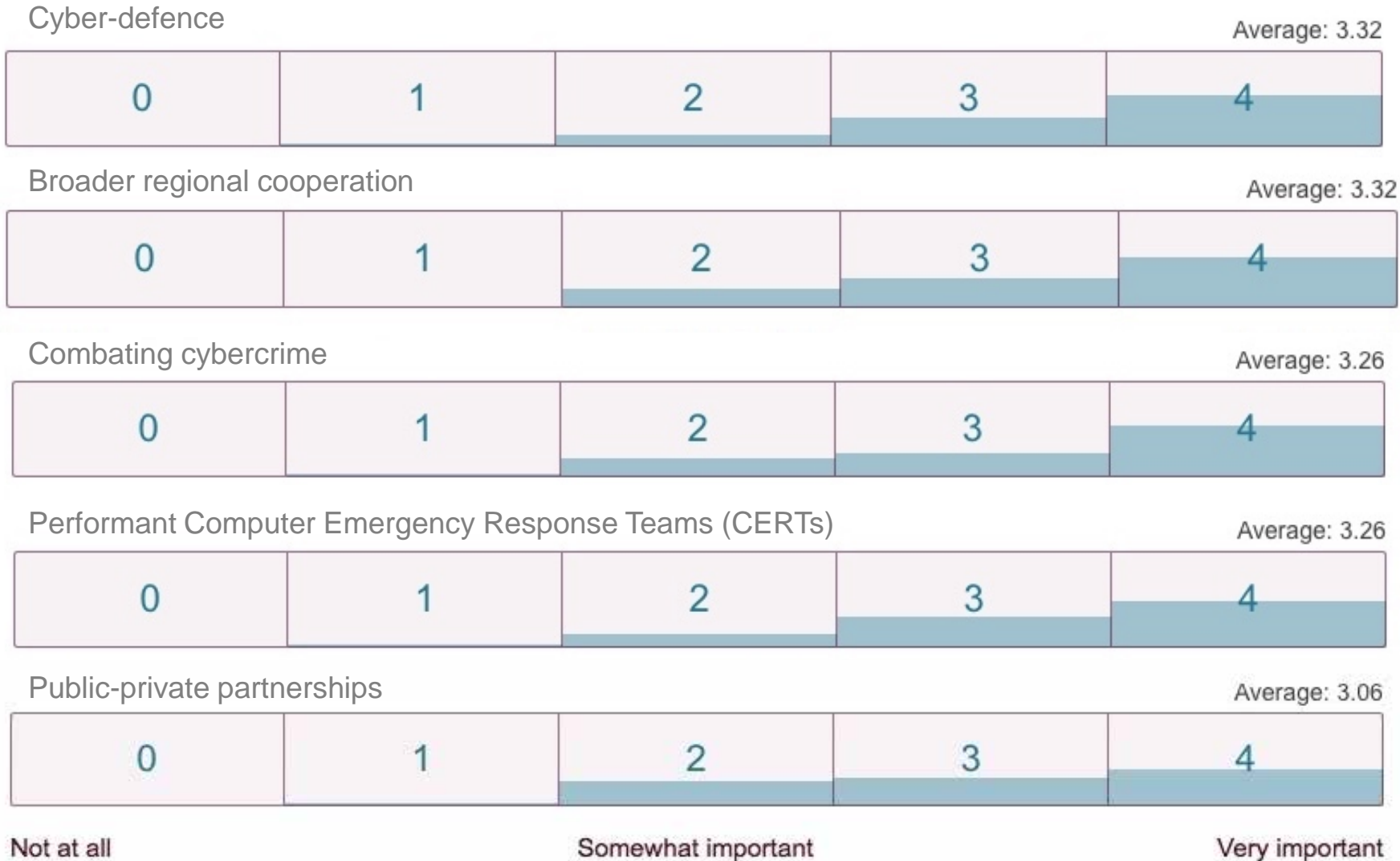


Not at all

Somewhat important

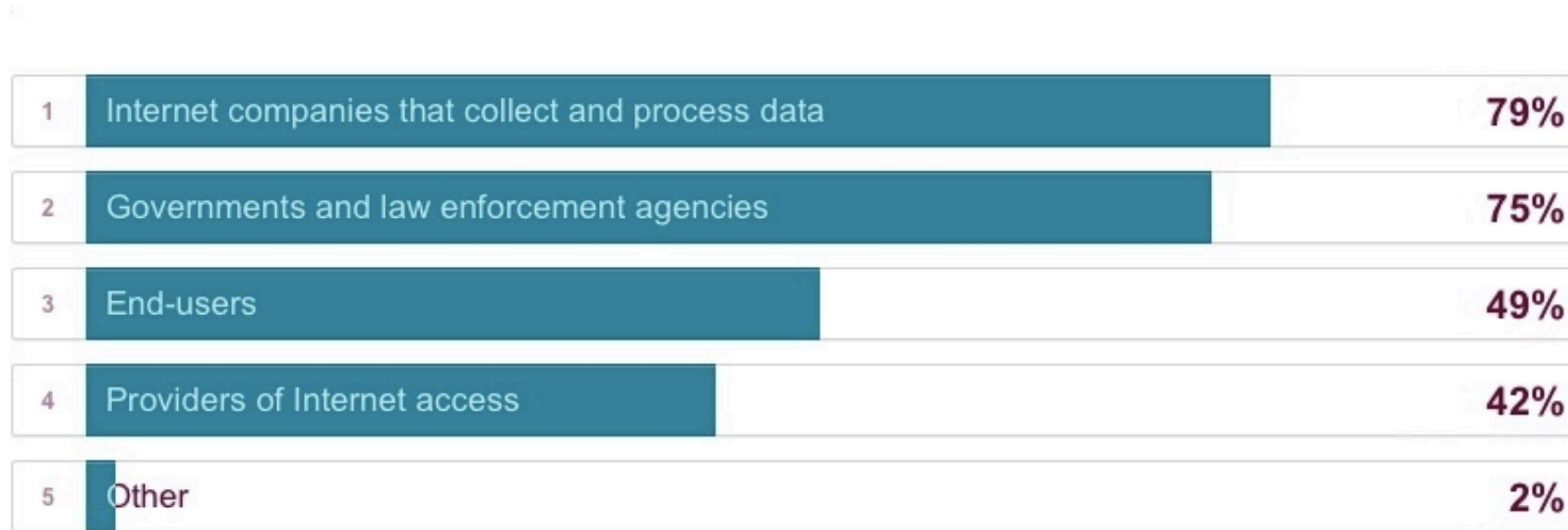
Very important

5.4. How important are the following issues when it comes to cybersecurity priorities in the SEE regional context? (cont)

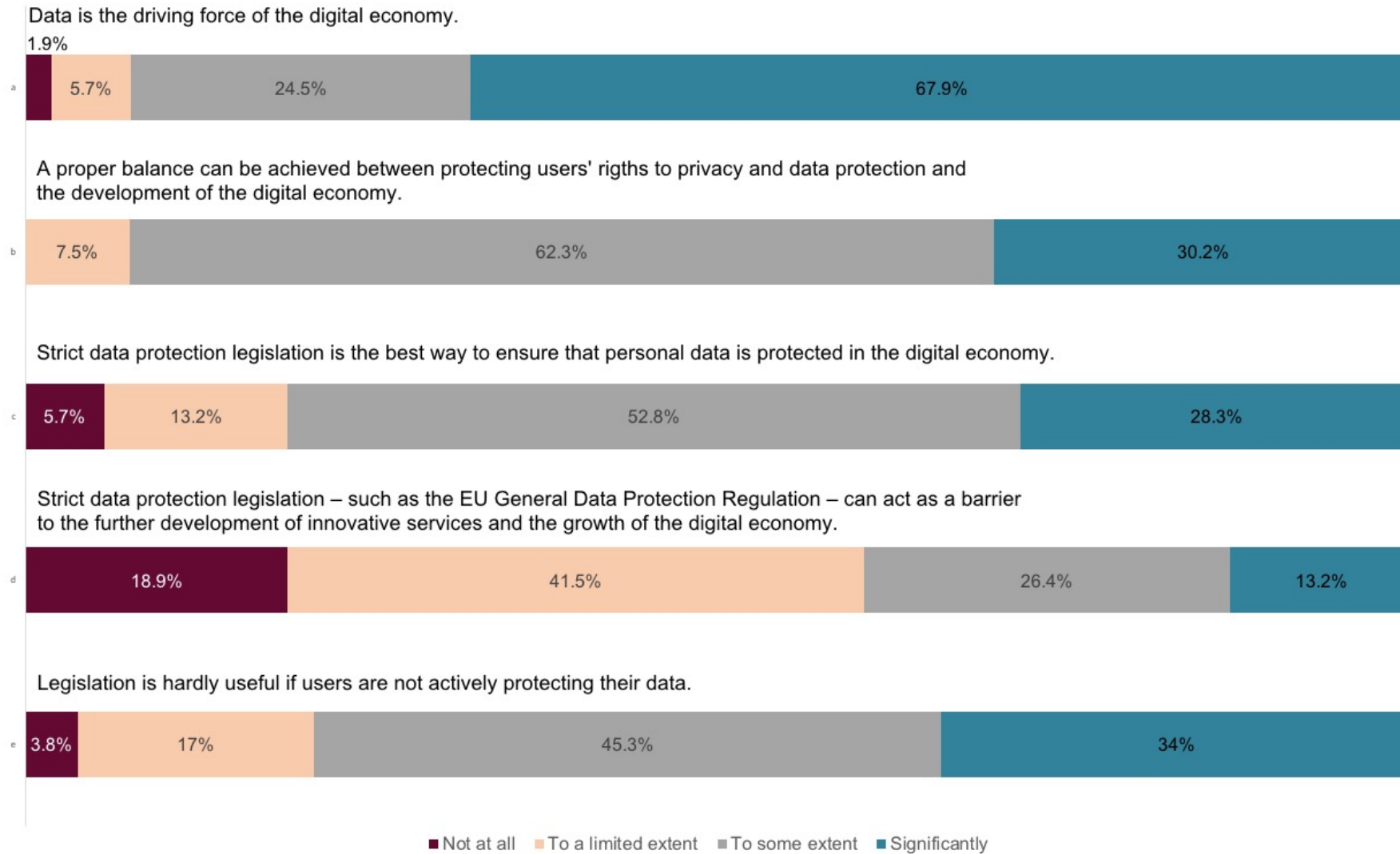


6. Data economy

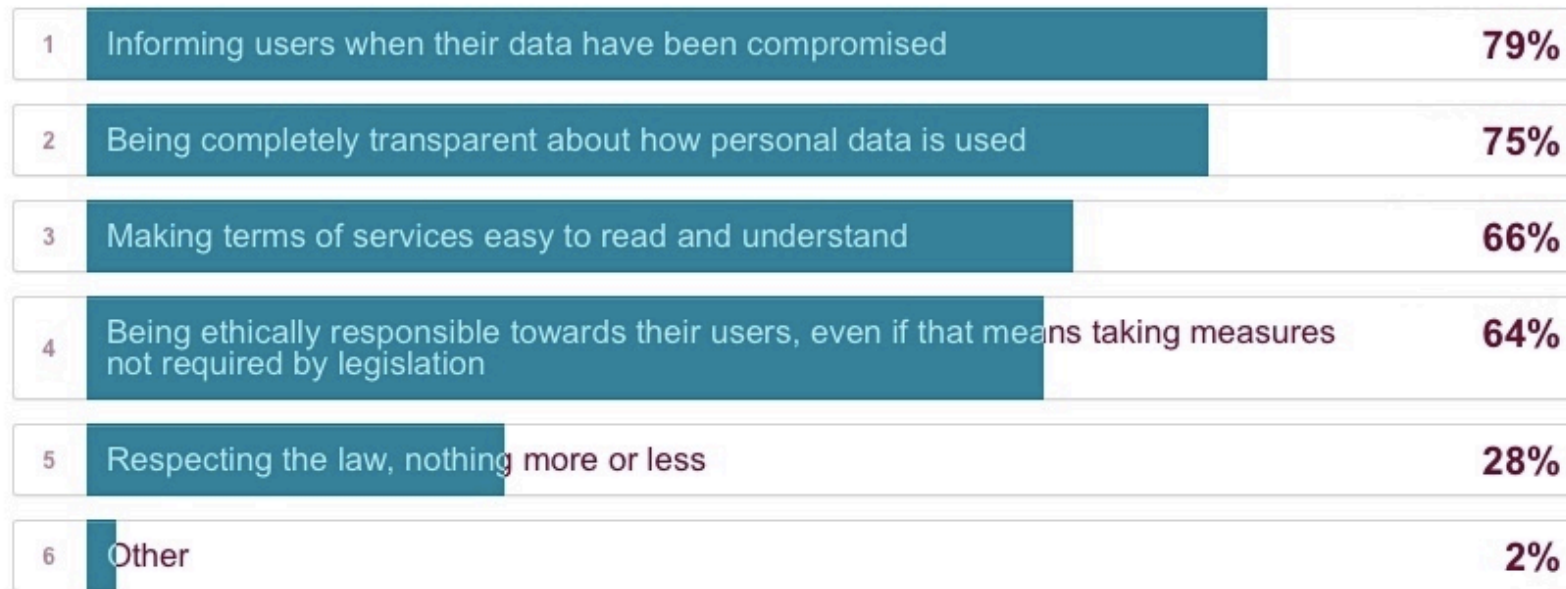
6.1. Privacy and data protection in the digital space is the main responsibility of:



6.2. Data protection in the digital economy: To what extent do you agree with... ?



6.3. When it comes to guaranteeing users' right to privacy and data protection, the main responsibility of Internet companies lies in:



There are no guaranties for privacy from Internet companies. It's not on them only, but on all involved.

7. Data-driven technologies

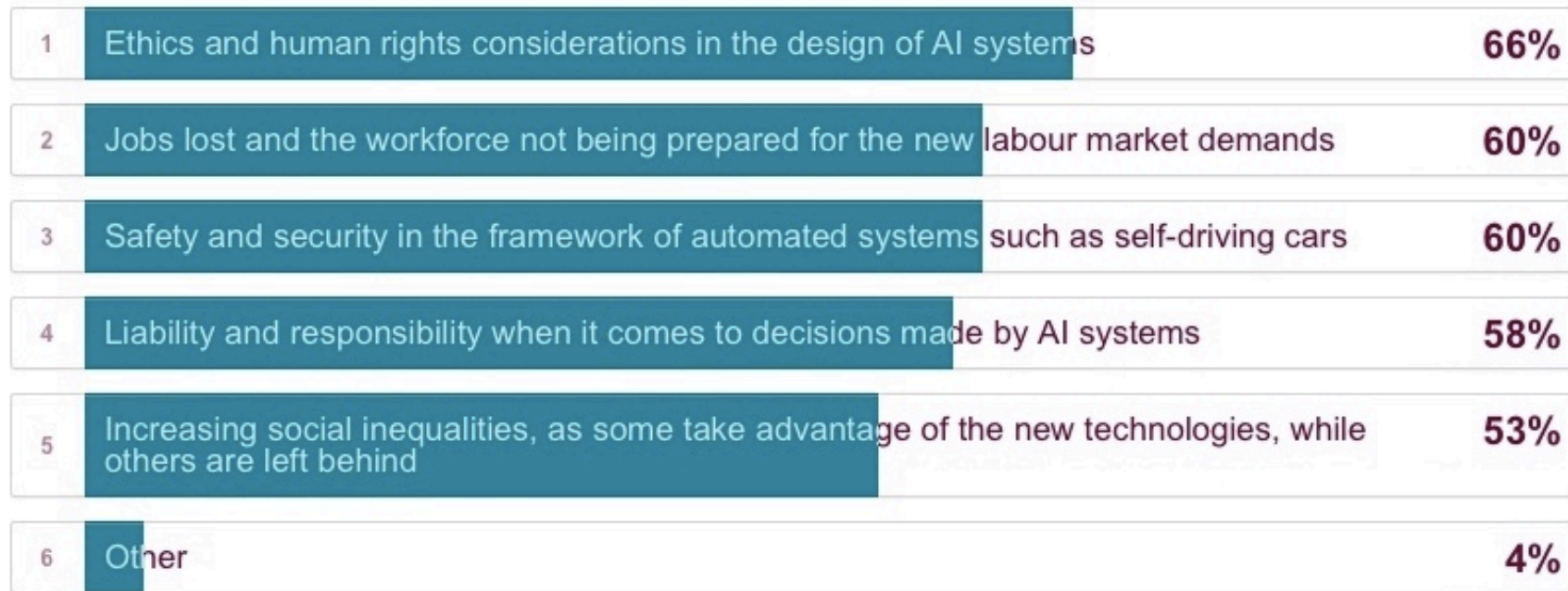
7.1. What are the main benefits that come with advancements in the field of robotics, automation, and AI?



Freedom of
routine work

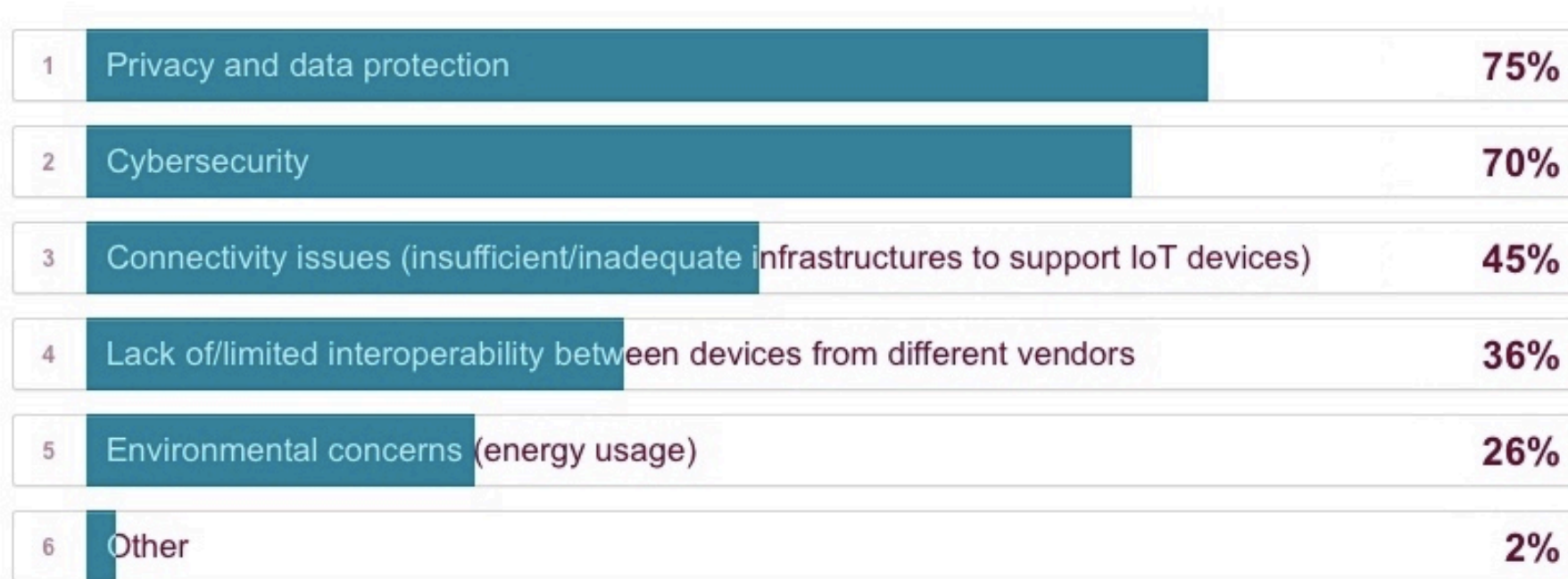
New better fields
and 'safer' jobs

7.2. What are the main challenges that come with advancements in the field of robotics, automation, and artificial intelligence (AI)?



These 'robots' some day maybe will be out of control.

7.3. What are the main challenges associated with Internet of Things (IoT) devices?



7.4. Can countries in SEE take advantage of the opportunities offered by data-driven technologies (AI, IoT, blockchain, etc.)?

1	Yes, if they focus on education and formation to ensure that today's and tomorrow's workforce is prepared for the new and emerging world of work.	77%
2	Yes, if they support innovation, research, and development in these technologies.	64%
3	Probably not, and we will face new forms of digital divides within the region, and in comparison with other regions.	17%

8. Technical issues: IDNs and IPV6

8.1. Should the Internationalised Domain Names (IDNs) be better promoted in the SEE region?

1	Yes, because they promote multilingualism and cultural diversity.	57%
2	Yes, because they can help bring more people online.	45%
3	No, because there are still unresolved technical issues.	25%
4	No, because they can lead to fragmentation of the Internet.	8%
5	No, because they create confusion.	8%

8.2. Who bares the main responsibility for improving Internet Protocol version 6 (IPv6) adoption in SEE?



Others responsible

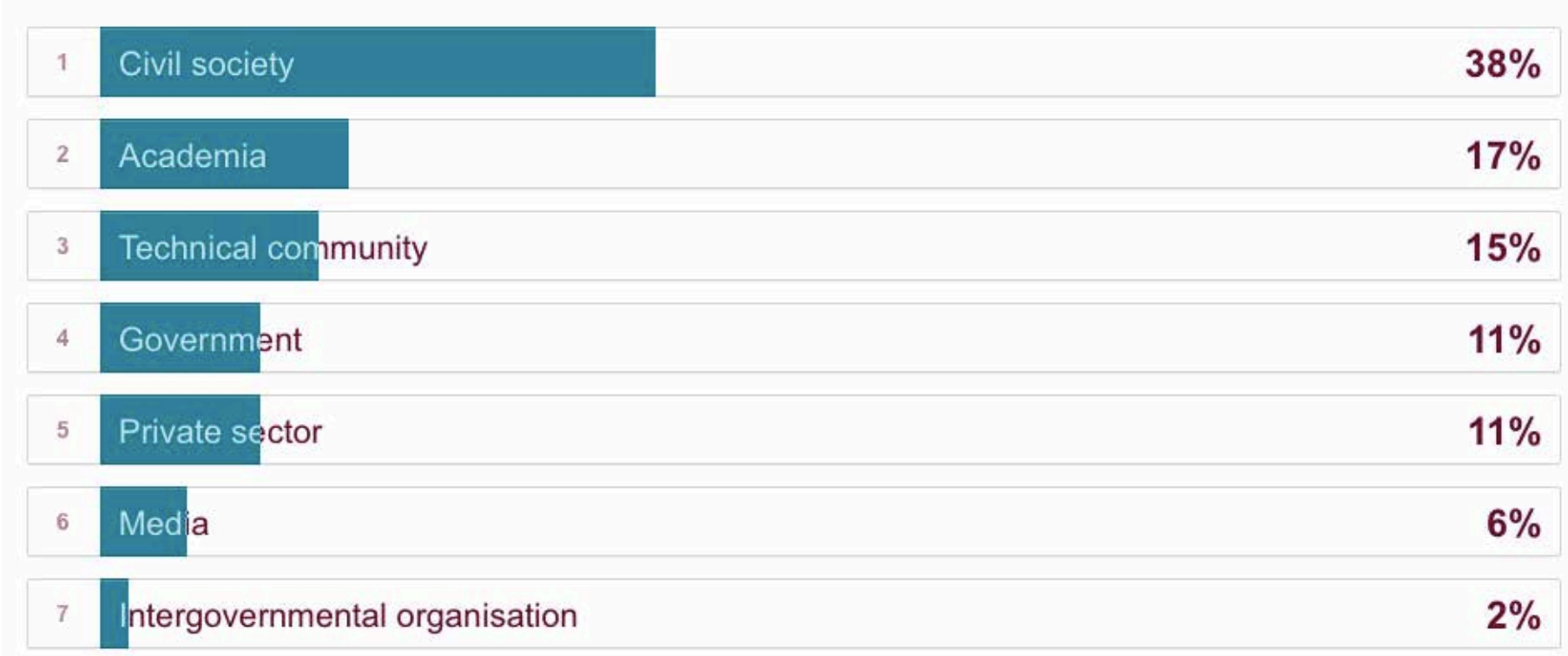
Education.
Players in SEE
are not aware of
IPv6.

Users

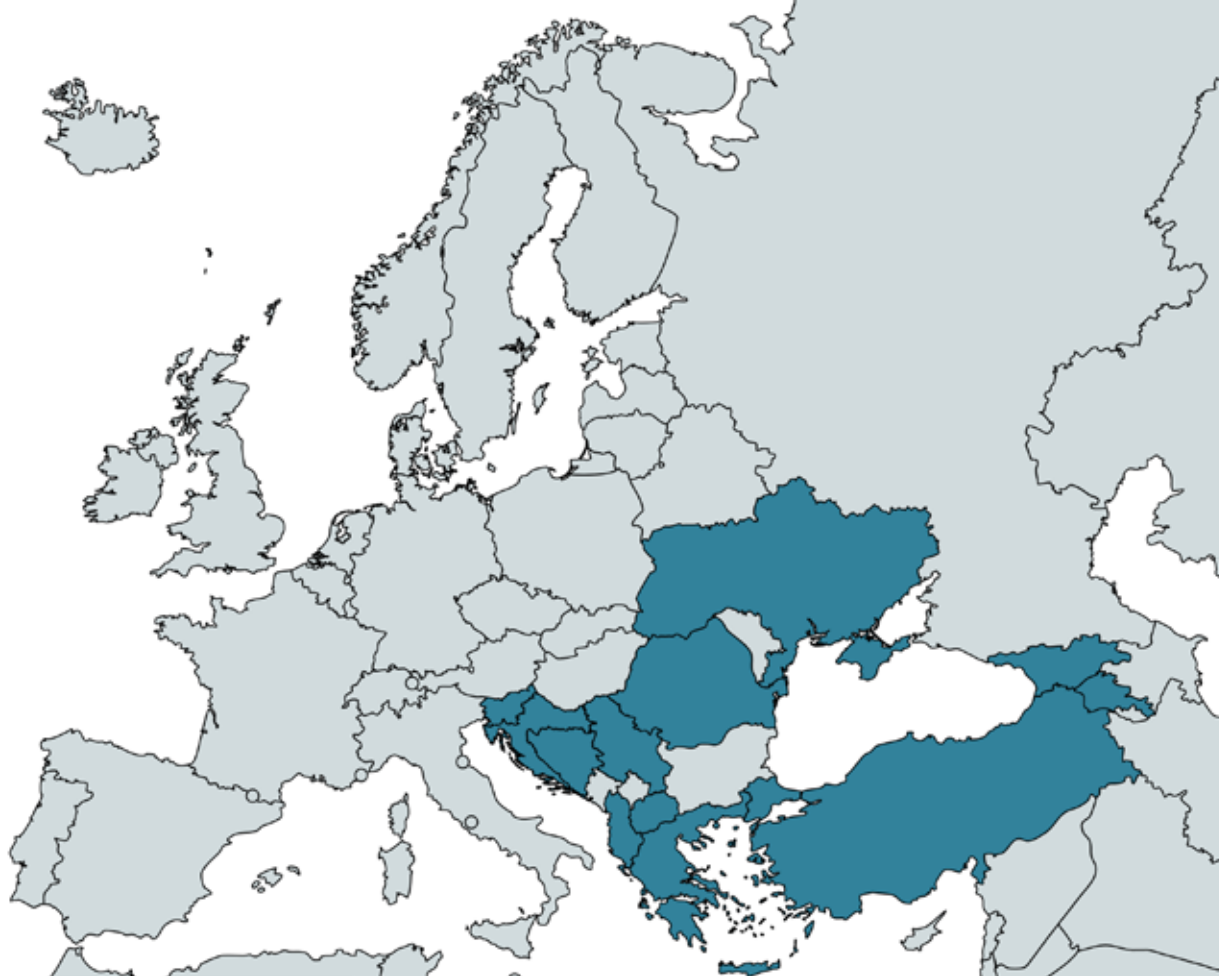
Non-governmental
technical
associations.

9. Demographics

9.1. Stakeholder group of respondents



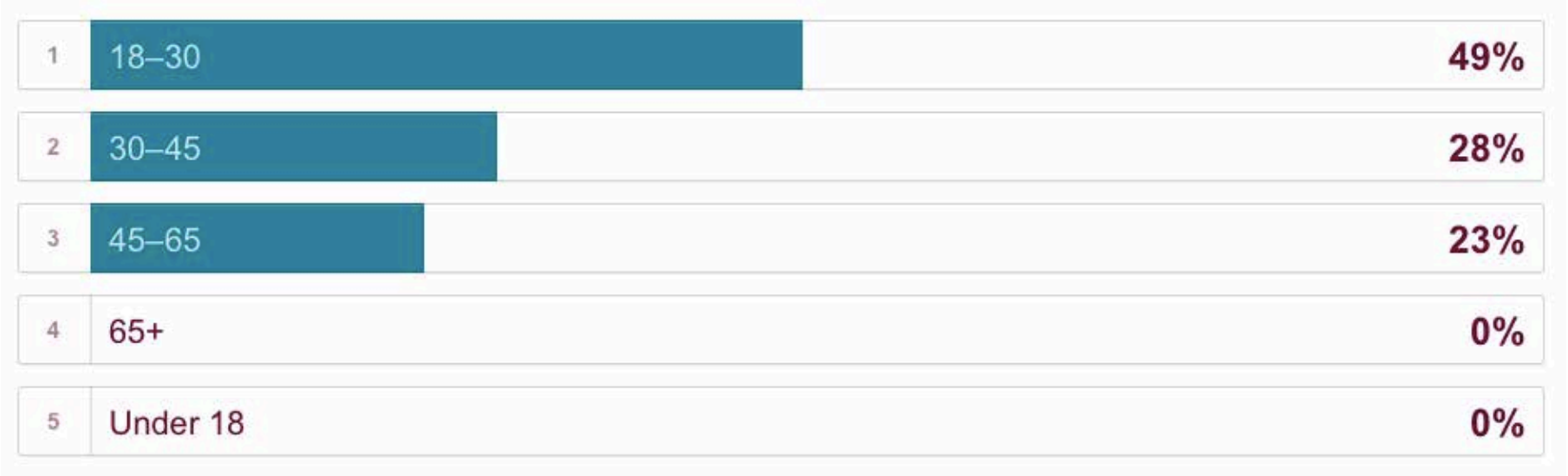
9.2. Countries of respondents



9.3. Gender of respondents



9.4. Age of respondents



Final notes

More details about the survey are available at <http://seedig.net/survey-2018-digitalisation/>.

For any queries, please contact us at execom@seedig.net.



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