



Discussion Paper  
**For International Seminar #1**

**‘Digital Economy Concept, Trends and Visions: Towards a  
 Future-Proof Strategy’**

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## 1. INTRODUCTION

As shown by the experience of leading countries, digital technologies can be transformational for development generating economic and social benefits for people, businesses and governments. Digital technologies now provide opportunities for inclusive and sustainable economic growth, in all sectors of the economy.

It is important for countries to undertake structured efforts to create and harness the benefits of **digital economy** in order to realize greater job creation, increase country competitiveness, allow for greater diversification and catalyze innovations in service delivery to improve the lives of their citizen.

Russian Federation has made good progress on leveraging the digital revolution to meet its development challenges. The country is already well positioned to take full advantage of opportunities offered by advanced digital technologies. By adapting and defining the digital economy in a context specific to the Russian Federation and by leveraging its already strong technology foundations, Russia can create a unique niche for itself and position itself as an emerging global leader in Digital Economy.

## 2. DIGITAL ECONOMY: CONCEPTS and DEFINITIONS

The concept of digital economy is evolving all the time because of its multifaceted and dynamic nature and due to the transformational power of digital technologies. For instance, the Australian government defines a digital economy as “the global network of economic and social activities that are enabled by platforms such as the Internet, mobile and sensor networks”<sup>1</sup>.

Digital economy is defined by Oxford Dictionary as “an economy which functions primarily by means of digital technology, especially electronic transactions made using the internet”<sup>2</sup>. The digital economy is sometimes called the Internet Economy, the New Economy, or Web Economy<sup>3</sup>. It is often perceived as conducting business through markets based on the internet and the World Wide Web<sup>4</sup>.

According to OECD, the digital economy enables and executes the trade of goods and services through electronic commerce on the internet<sup>5</sup>. European Union consider digital economy as “the single most important driver of innovation, competitiveness and growth in the world”<sup>6</sup>. The Economist Intelligence Unit and IBM joint study defines digital economy as one that “can provide a high quality of ICT infrastructure and harness the power of ICTs to benefit consumers,

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<sup>1</sup> [http://www.dbcde.gov.au/digital\\_economy/what\\_is\\_the\\_digital\\_economy](http://www.dbcde.gov.au/digital_economy/what_is_the_digital_economy)

<sup>2</sup> [https://en.oxforddictionaries.com/definition/digital\\_economy](https://en.oxforddictionaries.com/definition/digital_economy)

<sup>3</sup> [https://www.sciencedaily.com/terms/digital\\_economy.htm](https://www.sciencedaily.com/terms/digital_economy.htm)

<sup>4</sup> [https://policy.bcs.org/sites/policy.bcs.org/files/digital%20economy%20Final%20version\\_0.pdf](https://policy.bcs.org/sites/policy.bcs.org/files/digital%20economy%20Final%20version_0.pdf)

<sup>5</sup> <http://www.oecd.org/daf/competition/The-Digital-Economy-2012.pdf>

<sup>6</sup> [https://ec.europa.eu/growth/sectors/digital-economy\\_en](https://ec.europa.eu/growth/sectors/digital-economy_en)

businesses and governments”<sup>7</sup>. According to the UK Government, digital economy includes the manufacture of digital equipment, publishing, media production and computer programming<sup>8</sup>.

The recent studies highlight diffusion of the digital economy within the whole economy and claim that “it can no longer be described as a separate part, or subset, of the mainstream economy”<sup>9</sup>. It goes beyond e-commerce and e-business and includes doing business, conducting communications and providing services across all sectors including transport, financial services, manufacturing, education, healthcare, agriculture, retail, media, entertainment and business using digital technologies. Digital economy plays a significant role in accelerating global economic development, enhancing productivity of existing industries, cultivating new markets and industries, and achieving inclusive, sustainable growth<sup>10</sup>. At the same time, the digital economy is becoming a powerful catalyst and a driver of inclusiveness, by linking communities to each other in a sort of “global village”, sharing information, ideas and products, and allowing countries to rise up the value chain<sup>11</sup>.

**Discussion question:** What is the most appropriate definition of Digital Economy for Russia?

### 3. ECONOMIC AND SOCIAL BENEFITS OF DIGITAL ECONOMY DEVELOPMENT

Today, people around the world rely on mobile communication, internet access and social media for interactions with each other, sharing information and obtaining new knowledge and services, while governments and businesses increasingly prefer the internet for disseminating information, delivering services, communications, marketing and doing business in general.

According to the World Development Report 2016: Digital Dividends<sup>12</sup> recently released by the World Bank, digital technologies in many instances have boosted growth, expanded opportunities, and improved service delivery. Digital technologies have the power to deeply transform the economy as a whole and across various sectors. As shown by the successful practices, the more efficient use of digital technologies is a key driver for a more competitive economy, growth and jobs<sup>13</sup>.

#### 3.1. Contribution to Economic Growth

The global digital economy is experiencing high growth, rapid innovation, and broad application to other economic sectors. An Accenture study estimates that digital transformation of the top

<sup>7</sup> [http://www-935.ibm.com/services/us/gbs/bus/pdf/eiu\\_digital-economy-rankings-2010\\_final\\_web.pdf](http://www-935.ibm.com/services/us/gbs/bus/pdf/eiu_digital-economy-rankings-2010_final_web.pdf)

<sup>8</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/503666/Digital\\_Sector\\_Economic\\_Estimates\\_-\\_January\\_2016\\_Revised.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/503666/Digital_Sector_Economic_Estimates_-_January_2016_Revised.pdf)

<sup>9</sup> [https://ec.europa.eu/growth/sectors/digital-economy/policy\\_en](https://ec.europa.eu/growth/sectors/digital-economy/policy_en)

<sup>10</sup> [http://www.g20chn.com/xwzxEnglish/sum\\_ann/201609/P020160912341422794014.pdf](http://www.g20chn.com/xwzxEnglish/sum_ann/201609/P020160912341422794014.pdf)

<sup>11</sup> [http://oecdobserver.org/news/fullstory.php/aid/5568/Digital\\_economy:\\_Why\\_a\\_brighter\\_future\\_could\\_be\\_in\\_our\\_pocket.html#sthash.hztp3yR.dpuf](http://oecdobserver.org/news/fullstory.php/aid/5568/Digital_economy:_Why_a_brighter_future_could_be_in_our_pocket.html#sthash.hztp3yR.dpuf)

<sup>12</sup> World Development Report 2016: Digital Dividends. Washington, DC: World Bank.

Online access at: <http://documents.worldbank.org/curated/en/896971468194972881/pdf/102725-PUB-Replacement-PUBLIC.pdf>

<sup>13</sup> [https://ec.europa.eu/growth/sectors/digital-economy/policy\\_en](https://ec.europa.eu/growth/sectors/digital-economy/policy_en)

ten economies of the world is a \$ 1.36 trillion opportunity waiting to be unlocked by governments and business leaders<sup>14</sup>. According to BSG, it will reach \$4.2 trillion in the G-20 economies by 2016 and “already contributes up to eight per cent of GDP, powering growth and creating jobs”<sup>15</sup>. In addition, over 75% of the value added created by the Internet is in traditional industries, due to higher productivity gains<sup>16</sup>.

It is estimated, that the digital economy accounts for about 6 percent of GDP in OECD countries and in Sweden it reached to almost 8 percent of GDP due to significant competitive advantage in digital services and platforms the digital economy growth<sup>17</sup>. The UK’s digital economy has the largest proportion of GDP among G-20 countries (close to 10 percent of GDP). It led by a strong e-commerce sector and includes online retailing, sales of Internet-related devices, IT and telecommunications investments, and internet-related government spending<sup>18</sup>. The economic contribution of the digital economy in terms of Gross Value Added was £118 billion, 7% of the UK total in 2014.

### 3.2. Expanding business opportunities

The World Development Report 2016 Digital Dividends highlights many instances of how e-commerce is boosting the employment opportunities of those who may have been excluded from the global market place. According to the report, the internet enables many small firms to participate in global trade, thus leading to more inclusion. The WDR notes that ‘China’s State Information Center estimates that the recent boom in the country’s e-commerce sector has created 10 million jobs in online stores and related services, about 1.3 percent of the country’s employment.

According to Forbes<sup>19</sup>, 125,000 large organizations are launching digital business initiatives with estimated digital revenue increase by more than 80% by 2020. There is an evidence that the companies that are adapting digital technologies are 26% more profitable than their industry peers<sup>20</sup>. According to McKinsey Global Institute (MGI) report “Digital globalization: The new era of global flows”, “soaring flows of data and information now generate more economic value than the global goods trade” making “possible for companies to reach international markets with less capital-intensive business models”<sup>21</sup>.

New opportunities for entrepreneurship and self-employment are also growing rapidly in the digital economy.’ The rise of e-commerce platforms is creating a new group of micro-entrepreneurs, who are able to access global markets in a way that was impossible before. In the process, jobs are being created in firms that simply would not exist without such platforms such as Amazon, eBay, Alibaba and others. According to the latest Deloitte report<sup>22</sup>, global e-

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<sup>14</sup> <https://www.accenture.com/us-en/insight-digital-density-index-guiding-digital-transformation>

<sup>15</sup> <https://www.bcg.com/documents/file100409.pdf>

<sup>16</sup> [https://ec.europa.eu/growth/sectors/digital-economy/importance\\_en](https://ec.europa.eu/growth/sectors/digital-economy/importance_en)

<sup>17</sup> <http://www.worldbank.org/en/publication/wdr2016>

<sup>18</sup> <https://www.bcg.com/d/press/1may2015-internet-contributes-10-percent-gdp-uk-economy-12111>

<sup>19</sup> <http://www.forbes.com/sites/gilpress/2015/12/06/6-predictions-about-the-future-of-digital-transformation/#1d47b8e725b4>

<sup>20</sup> <https://hbr.org/2016/03/the-4-things-it-takes-to-succeed-in-the-digital-economy>

<sup>21</sup> <http://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/digital-globalization-the-new-era-of-global-flows>

<sup>22</sup> <http://www2.deloitte.com/content/dam/Deloitte/global/Documents/Consumer-Business/gx-cb-global-powers-of-retailing-2016.pdf>

commerce retail sales of goods and services nearly doubled in 2014 compared to 2011 while the share of e-commerce in gross domestic product (GDP) increased from 1.47 percent to 2.64 percent over the same period.

### 3.3. Creating new jobs

The digital economy in UK employed 1.3 million people in 2014, 5% of all employees. There were 204,000 digital economy businesses, 9% of the UK total in 2015. Over the last five years, the development of mobile applications alone has created nearly 500 000 new jobs in the US, implying strong employment growth prospects. It is estimated that 1.5 million additional jobs could be created in the EU digital economy if it mirrors the performance of the US or Sweden<sup>23</sup>. According to a BCG study, European countries that are leaders in digitalization, such as Denmark, Sweden, Finland etc., between 2015 and 2020 the number of new jobs will exceed the number of those phased out by 1.6–2.3 million<sup>24</sup>.

### 3.4. Improving Public Services

A combination of widespread access to broadband and a robust ICT services ecosystem can offer a powerful platform for improving service delivery in key sectors. As highlighted by Mckinsey<sup>25</sup>, “innovative governments are making it easier for citizens to access public services” and shifting from simply administering services to regularly engaging and empowering citizens to participate in the design and the delivery of these services. This help not only increasing choice and well-being but also boosting government productivity and efficiency of public administration. For instance, the UK government’s 2012 Digital Efficiency Report suggested that transactions by e-government channels are 20 times cheaper than by phone, 30 times cheaper than by post and as much as 50 times cheaper than by face-to-face contacts. Shifting 30% of government service delivery “front office” contacts and transactions to digital channels would deliver gross annual savings of more than £1.3 billion a year, rising to £2.2 billion a year if 50% of contacts and transactions shifted to digital channels<sup>26</sup>.

**Discussion question:** What economic and social benefits do you see from Digital Economy that are most relevant for Russia?

## 4. ROLE OF GOVERNMENT IN FOSTERING DIGITAL ECONOMY

It is important to be strategic in identifying and prioritizing digital initiatives that can give it a head start in an increasingly competitive, digitally enabled world. This section will identify **key areas of intervention** where the government can play an important role to better prepare their countries

<sup>23</sup> [https://ec.europa.eu/growth/sectors/digital-economy/importance\\_en](https://ec.europa.eu/growth/sectors/digital-economy/importance_en)

<sup>24</sup> <http://www.english.bcg.ru/documents/file210991.pdf>

<sup>25</sup> <http://www.mckinsey.com/industries/public-sector/our-insights/government-by-design-four-principles-for-a-better-public-sector>

<sup>26</sup>

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/60993/Martha\\_20Lane\\_20Fox\\_s\\_20letter\\_20to\\_20Francis\\_20Maude\\_2014th\\_20Oct\\_202010.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/60993/Martha_20Lane_20Fox_s_20letter_20to_20Francis_20Maude_2014th_20Oct_202010.pdf)

for the digital future. Governments need to find ways to foster digital economy and find new ways to introduce progressive policies, introduce new institutions and learn how to deal with new risks.

#### 4.1. New ways of policy making to allow for rapid technological progress

In a world now being overtaken by disruptive technologies, there are a few things that countries will need to think about differently. With increasing acceleration of technology, 5-10 years cycle in policy making is no longer relevant. Governments need to constantly re-invent technology related policies, which often will need to be developed in an agile way, to go hand in hand with ICT enabled innovations and create economic opportunities for industries that will be powered by disruptive technologies.

A variety of ICT enabled solutions are disrupting the traditional sectors and enable of explosion solutions like Zipcar, Uber, WhatsApp, Airbnb and many others. However, there is limited knowledge/research on how countries should respond to disruptive technologies (such as AI, Artificial Intelligence, Robotics etc.)

The importance of thinking through future proof policies cannot underestimated. For example, in a few years from now, we can have driverless cars just rooming around the city creating traffic jams just because it will be cheaper to just let them cruise versus paying a high parking fee while the owner has a short meeting downtown; on other hand, thanks to “sharing solutions enabled by technology” we may be able to achieve a more sustainable growth thanks to the ability to more effectively share assets. We may see instances when wealth will be created almost overnight or during a considerably short period of years for example by owners of companies such as Facebook, Airbnb, Snapchat and others.

The policy environment of the future needs will need to allow for local growth of “companies on steroids”, such as Uber, Couchsurfing, Homeaway, Duolingo, Waze and more new comers such as TaskRabbit, Care and others.

**Discussion question:** What are the new policies/regulations that the countries will need to put in place in order to capitalize on new technologies while safeguarding against potential unintended negative consequences?

#### 4.2. Need for new type of institutions and leadership for a digital era

Governments find a way to set up different types of institutions that can respond/adapt to quickly changing landscape, respond in terms of policy and strategy and provide a safe place for others to innovate and test out new ideas. Disruptive technologies call for completely radical institutional structures and approaches. A number of countries have already recognized this need and setting up new governance structures.

Select governments are already trying out 'foresight' activities to identify opportunities and threats from over-the-horizon technologies and trends. Examples are the European Strategy and

Policy Analysis System (ESPAS), Singapore's Center for Strategic Futures, and the Committee on the Future Economy; the UK Foresight Office, France's Centre d'Analyse strategique (CAS); and Policy Horizons Canada (PHC). This list is not exhaustive.

For instance, the Centre for Strategic Futures, established in 2009 as part of the Singapore Prime Minister's office, serves as a focal point for futures thinking within the Singapore government, and seeks to support public service in a complex and fast-changing environment. (<http://www.csf.gov.sg/>). In addition, academic institutions such as Singapore's Lee Kuan Yew School of Public Policy and Republic of Korea's Advanced Institute for Science and Technology (KAIST), have strategic foresight education programs focused on building cutting-edge research capabilities and capacity, and assisting governments in those countries develop strategic foresight.

Data combined with analytics can offer significant insights into every aspect of policy formulation and the design, implementation and monitoring of developmental interventions. Data analytics can therefore, be a game changer. A number of countries are establishing Data Analytics related capabilities with a view to leveraging analytics for economic growth and development:

- New Zealand has established a Data Futures Partnership. The State of New South Wales in Australia has established a Data Analytics Centre (DAC).
- Similarly, states like Indiana and North Carolina in the US have established DACs.
- In Singapore, the government has established an Analytics Center under the Institute of Infocomm Research besides building capabilities in its Government Technology Office.

**Discussion question:** What are the institutions and the governance structures that Russian government plans or need to put in place to take full advantage of Digital economy?

### 4.3. Talent management and skills development

The rapid growth of new technologies and business models, demographic shifts, and economic trends are likely to have significant global impacts. Such effects will necessarily cause stresses in labor markets as existing jobs change, evolve and in some cases disappear. As per current thinking, more than half the children in schools will work in occupations that do not exist yet.

Advances in robotics, artificial intelligence, autonomous/semi-autonomous vehicles are a few examples of disruptive technologies that are gaining momentum. Changes in demographics and economic variables are also becoming increasingly pronounced. The effects of these cumulative changes on labor markets are likely to be felt across all countries – developed and developing, though their intensity might vary depending on the differing circumstances of different countries.

Countries in preparing for the future will, therefore, need to pursue agile strategies for rapidly aligning skills to fast changing demand in labor markets. Such approaches may need to create a “liquid workforce” which is highly adaptable and malleable to changing market needs. Countries will need to move on multiple fronts in this context. At one end countries will need to have a



much more sophisticated and granular understanding of the local, regional and global demand for skills. At the other end, countries will need to put in place mechanisms for anticipating and responding to this demand.

For example, Burning Glass Technologies (<http://burning-glass.com/>) conducts job market analytics by analyzing hundreds of millions of job postings and real-life career transitions to provide insight into labor market patterns. Such real-time strategic intelligence could provide crucial insights, as to which jobs are most in demand, the specific skills employers need, and the career directions that offer the highest potential for workers. The methodology could leverage data from multiple platforms like LinkedIn, Upwork and others. APIs available with some of the online talent platforms (e.g. Upwork) could be used to access data on a continuing basis. The analytics could also take into account economic and social trends, pick up market signals, including from qualitative data about patent filings, venture capital funding and innovative data sources (e.g. <https://spaceknow.com/>). The above approach is illustrative and does not represent definitive thinking on the methodology to be adopted. The actual methodology for conducting such analytics could be developed and refined as an international challenge. See, for example, this site: <http://diggingintodata.org/awards/2016/news/announcing-t-ap-digging-data-challenge-2016>

There examples of alternative approaches already being tried out to educate the future work force:

- University 42 established by a French billionaire is a university without faculty, approach is forward looking, and offers many useful lessons to any country.
- Another examples is World Quant University, a first of its kind, world class online university offering free Masters in Quantitative Finance to individuals ( established by Russian billionaire Igor Tulchinsky).

**Discussion question:** What skills need to be developed by countries to remain competitive in Digital Economy?

#### 4.4. Find a way to effectively measure the benefits of digital economy

Investment in creation of *Digital economy* can bring manifold benefits:

- An Accenture study estimates that digital transformation of the top ten economies of the world is a \$ 1.36 trillion opportunity waiting to be unlocked by governments and business leaders<sup>27</sup>. According to the European Parliament, the digital economy facilitated through a single digital market could create additional economic growth of 340 Billion Euros<sup>28</sup>.
- However, there is no one universal way to do it and we are seeing lots of varying estimates. There is a number of unanswered questions, including ow can we use innovative approaches.

<sup>27</sup> <https://www.accenture.com/us-en/insight-digital-density-index-guiding-digital-transformation>

<sup>28</sup> <https://engage.number10.gov.uk/digital-single-market/>



For example, Chinese government statistics collected is matched up against data from satellite companies that track logistics leaving warehouses (as a proxy), to provide an estimate of the size of Digital economy.

**Discussion question:** How Russian government can measure Digital Economy?

## 5. WHAT ARE RISKS ASSOCIATED WITH NEW DIGITAL ECONOMY?

There is a number of risks that the government need to think about. A few are listed here.

### 5.1 Cyber security

Cybersecurity risks are growing exponentially with the increasing digitization of the economy. Countries like Russia have the opportunity to develop new approaches to tackle this issue in innovative ways. The government might consider some aspects of cyber security to be too sensitive to be handled by the private sector. However, there might be value in pursuing in parallel public-private partnerships in cybersecurity for creating a more secure ecosystem for private sector players in Russia. Unless cyber security is addressed across the digital economy spectrum, it will be difficult to have a secure and trusted environment conducive to growing businesses and attracting investors. Various partnership approaches could be explored in this context. For example, cyber risk insurance is becoming increasingly important, and there may be opportunities for PPPs in the reinsurance of cyber risks, much along the lines of catastrophe reinsurance. There may be other models that might be of interest, e.g. establishment of fusion labs on a PPP model to monitor and guide firms and organizations in Russia on cyber threats as they evolve.

### 5.2 Disruptions in labor markets

While the Digital Economy is believed to create new jobs, on the other hand, the shift to automation, ability to connect and quickly create a test ideas are posing risks to the traditional types of employment and job security as we know it today. WDR2016 on Digital Dividends identifies a number of risks such:

- Risks associated with the speed of labor market changes and the destruction of traditional jobs;
- Risks associated with changing nature of work and the quality of internet enabled jobs, such as microwork or jobs in the on-demand economy;
- The risks associated with widening income inequality. Although technologies are becoming wide-spread. The economic pay off are not.

The governments need to think through strategies to address this problem. The below framework suggests the different areas and trends that would impact future employment.

Trend	Employment trade-offs	Examples
<b>Automating:</b> effort replaces human effort; the capability of machines is increasing to cover a wider range of tasks	Labor productivity increases; but labor may be augmented by or substituted by capital; workers with skills to create and use these machines benefit, while others might lose out; lower prices for goods and services may increase demand and have longer term positive effects on job creation	98,900 robots were installed in the automotive industry worldwide in 2014; IBM's Watson computer assists oncologists to diagnose lung cancer; automation is causing middle-skill job creation to stagnate
<b>Connecting:</b> Networks connect over five billion people globally, simplifying transactions, searches, and access to information and work	Productivity increases; information gaps reduce; collaboration and distribution of work is possible; work could be displaced due to competition within or across markets	Mobile phones ease farmers' access to market information, improving earnings; 'car sharing' services link riders with underutilized drivers but put traditional taxis out of work[1]
<b>Creating:</b> Digital tools allow humans to create and test new objects and ideas, reducing the costs and risks of innovation	Product and process innovation potentially creating new sectors, firms, and jobs, but could also make some jobs redundant	3D printing helps manufacturers cut prototyping and testing costs; computer animation has created 80,000 jobs in India and 64,000 jobs in the U.S. but displaced traditional animator jobs

### 5.3 Being left behind

While lowering the bar, the digital divide is also widening because some countries are making great investments in research capabilities in the area of digital economy. For instance:

- The University of Michigan has developed shared supercomputing capabilities, which can be accessed/used internationally.
- China is already taking a lead by investing billions of dollars and has developed quantum satellites (that can send information securely using the laws of physics and not encryption).
- Further China is investing heavily in building a 161 Billion \$ home grown semiconductor industry<sup>29</sup>

Similarly, Russia **will need to think about what investment they could make to give them head start**, and ensure that the digital investments divide is not widening with comparator economies.

**Discussion question:** What are the risks that are most relevant for Russia?

<sup>29</sup> <https://www.bloomberg.com/news/articles/2015-06-25/china-has-big-plans-for-homegrown-chips>

## DISCUSSION QUESTIONS

These are the suggested discussion questions that can be posed to the audience by the moderator:

- What are the key lessons and success factors for developing the Digital Economy?
- What is the most appropriate definition of Digital Economy for Russia?
- What economic and social benefits do you see from Digital economy that are most relevant for Russia?
- What are the new policies/regulations that the countries will need to put in place in order to capitalize on new technologies while safeguarding against potential unintended negative consequences?
- What are the institutions and the governance structures that Russian government plans or need to put in place to take full advantage of Digital economy?
- How Russian government can measure Digital economy?
- What are the risks that are most relevant for Russia?
- What do you think are the most pressing challenges and opportunities for Russia?
- What are the most disruptive technologies that will fuel Digital Economy of the future?