



ISSUE BRIEF

The Next Phase of Digitalization in Central and Eastern Europe: 2020 and Beyond

FEBRUARY 2020 FRANCES G. BURWELL AND JÖRN FLECK

The countries of Central and Eastern Europe (CEE) must grasp the opportunities afforded by the ongoing transition to the digital economy and use them to grow not only their economic future, but also their political influence within Europe and in the transatlantic relationship.¹ If Central and Eastern European governments make the right choices, the impact of digitalization on their economies could be immense. These countries already have many advantages that will help them adapt to the digital economy, with a positive impact for their citizens, the region, and Europe as a whole.

Just as important, a successful transition to an energetic digital economy will boost the standing and influence of the region within Europe, including in the European Union (EU). If these countries can be digital innovators and provide strong economic growth, the digital transition can not only demonstrate for the rest of Europe that the region is on the right path, but also offer some lessons for others. To date, Estonia has been the prime example of this “soft-power” approach, and its status in the EU has notably increased in recent years, not least thanks to its industries’ competitiveness, its citizens’ digital literacy, and its thought leadership on cybersecurity issues. Successful adaptation to the digital economy will also enhance Central and Eastern Europe’s role in transatlantic relations, providing an economic anchor for that relationship, in addition to the current focus on the security and defense partnership.

Together, a strong economic rationale and its geopolitical benefits may be just what is needed to mobilize greater impetus and buy-in, from both the public and private sectors, to drive forward a coherent strategy for digitalization across the region and seize the opportunities of the digital economy for CEE. Discussions about digitalization as the next great engine of growth for the countries of CEE can be traced back to the mid-2000s and

The Atlantic Council’s **Transatlantic Digital Marketplace Initiative** seeks to foster greater US-EU understanding and collaboration on digital policy matters and makes recommendations for building cooperation and ameliorating differences in this fast-growing area of the transatlantic economy.

¹ The Atlantic Council will convene an expert task force in 2020 to examine the opportunities that will accompany the digitalization of the Central European region. This think piece is intended to provide an initial outline of the direction of inquiry for the task force, raising questions and proposing possible impacts to be explored. However, the task force final report will be guided by the expertise brought to bear by task-force members and the input the task force receives from a broadly based group of stakeholders in the digital future of Central and Eastern Europe.

have intensified again in recent years. There is growing consensus among political, business, and civil-society stakeholders about the digital potential of the region. The digital pillar of the Three Seas Initiative (3SI)—a forum of twelve states along the north-south corridor in Central Eastern Europe that promotes and facilitates interconnectivity²—is a testament to this.

But, for a variety of reasons, it has proven challenging to translate such agreement into tangible, regionally coordinated efforts and policy action to begin securing that potential. Diverging national interests among the countries in the region, and different starting points when it comes to digitalization, have had their roles to play. Identifying common projects and policy initiatives that mobilize a critical mass of CEE countries has posed another challenge. At the same time, two separate conversations of first-order importance have not found a common narrative and inspiration. One focuses on the geopolitical importance of the region, and on the role of technology writ large in a new era of great-power competition, but often lacks a detailed understanding of digitally driven transformations and their economic impact. The other is a digital policy debate that rarely connects with the broader geostrategic interests and imperatives facing political leaders in the region. Bridging and combining those conversations may seem a challenge in and of itself. But, in combination, strong digital fundamentals, the economic potential of the next wave of digitalization, and the geopolitical context in which Central and Eastern Europe finds itself, can provide an opening for renewed impetus, and political will to seize digitalization to address the region's economic and geostrategic goals.

The Economic Backdrop

Although each national economy is different, the countries of Central and Eastern Europe have built a solid economic base for this transition. Since 1989, the CEE countries have made significant progress in growing their economies. In 1995, the eleven CEE countries had an average GDP per person of \$4,171, and by 2018, that had risen to an average of \$17,908, with a range from \$9,273 to \$26,124.³ Most have joined the European Union (EU), and several are also members of the most exclusive European economic club, the eurozone. While some Central and Eastern European countries have received due attention for their economic expansion, the role of the entire region as an engine of growth for the European Union as a whole—with above-average growth rates compared to larger and older EU members—is often underappreciated. It is one of the undersold success stories on the continent.

But, the days of easy economic growth based on a transition from lethargic, formerly state-run economies catching up with their free-market peers elsewhere in Europe appear to be coming to an end. To date, CEE has largely relied on manufacturing and competitive labor costs for economic growth and development when compared with Western Europe. Often positioned at the lower end of global value chains, the countries of Central and Eastern Europe may face the threat of the middle-income trap.⁴ Lower productivity and capitalization rates are also improving only slowly, and pose medium-term challenges. While the region's population accounted for 22 percent of the EU total in 2017, its share of EU-wide GDP was roughly half of that.⁵ A brain drain of skilled labor from the region remains a problem with long-term repercussions. At the same time, Central and Eastern European societies face potential challenges familiar to their Western European neighbors—a demographic decline, skills gaps, and disruptions to manufacturing and other sectors from automation and other technological transformations.

2 David Wemer, "The Three Seas Initiative explained," Atlantic Council, accessed February 6, 2020, <https://www.atlanticcouncil.org/blogs/new-atlanticist/the-three-seas-initiative-explained-2/>.

3 World Bank data, available at <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=B8>, accessed February 10, 2020.

4 Europe, "Can the good run of central Europe's economies last?," Economist, October 24, 2019, <https://www.economist.com/europe/2019/10/24/can-the-good-run-of-central-europes-economies-last>.

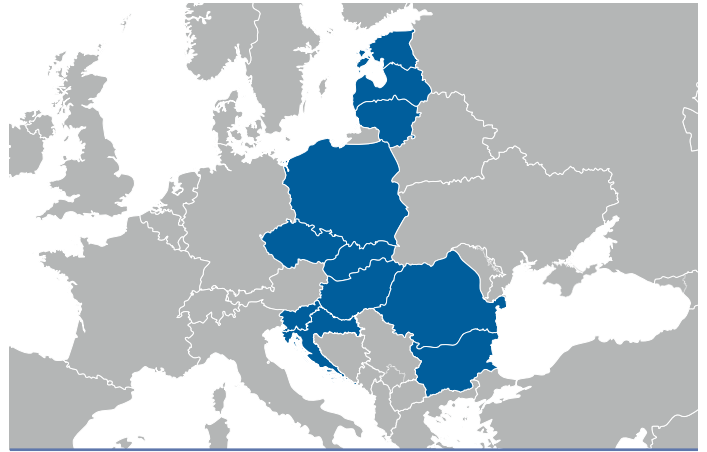
5 "Population, total - European Union, Central Europe and the Baltics," World Bank Data, Accessed February 6, 2020, <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=EU-B8>.

Some CEE countries have developed vibrant pockets of the digital economy, providing back-office services in accounting, human resources, and many other online specialty services for companies around the world. But, Central and Eastern Europe cannot continue to rely on lower wages in order to sustain its economy. Nor should it rely indefinitely on its digital workforce specializing in jobs that are likely to be reduced, or at least transformed, as artificial intelligence is integrated more widely into the economy. Moreover, significant subsidies from the EU to the region—designed to raise these new market economies closer to the level of the EU overall—are likely to be curtailed in the next multi-year EU budget. Governments throughout the region must find new sources of homegrown economic strength.

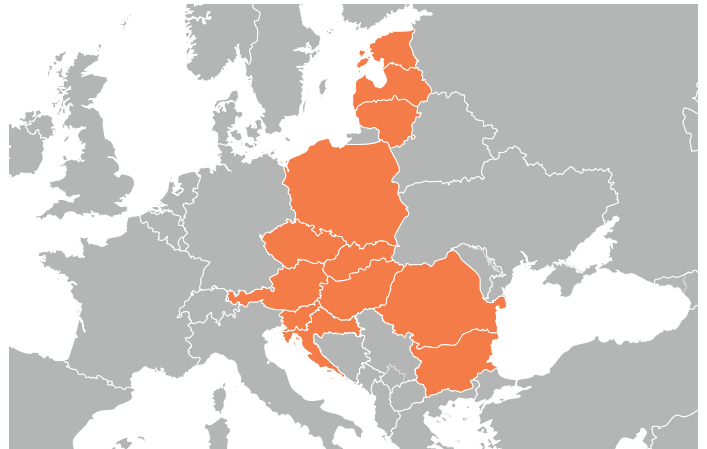
The Geopolitical Backdrop

Ensuring future growth, prosperity, and competitiveness is not purely an economic policy challenge. A broader geostrategic dimension is even more pertinent for a Central and Eastern European region located at a geopolitical fault line. With the region's eastern borders also delineating the external frontiers of the European Union and NATO, Central and Eastern Europe's geopolitical importance is significantly shaped by its proximity to Russia. In recent years, Moscow's resurgent and revisionist policies toward the West have played out, in large part, in the region and its periphery. Russia's annexation of Crimea and its involvement in the conflict in eastern Ukraine have refocused attention on Central and Eastern Europe in Washington, Brussels, and other European capitals.

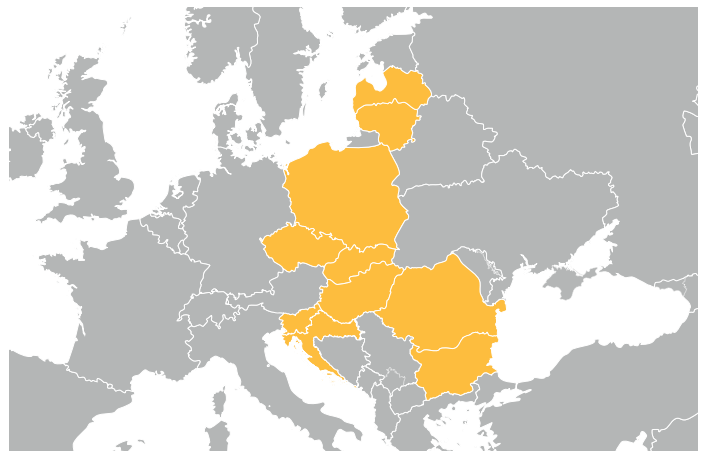
With the return of great-power competition and a changing geopolitical landscape, new players have also entered the stage. China has made a concerted effort to increase its footprint and influence in the region, as well through new initiatives of ostensibly economic character, such as the Belt and Road Initiative (BRI) and the seventeen-plus-one (17+1) initiative. As Russian disruption and potential Chinese efforts to divide and conquer Europe through geo-economic instruments pose new challenges, economic stability and resilience in Central and Eastern Europe have taken on a new, more strategic significance.



Map 1. Central and Eastern Europe countries in the European Union



Map 2. The Three Seas Initiative (3SI)



Map 3. Digital Challengers countries

Three decades after the fall of the Iron Curtain, Central and Eastern Europe is firmly anchored in the transatlantic community. Since joining NATO and the EU over the last two decades, the countries of the region have focused on building capabilities, aligning regulations, and learning how to work within these complex organizations. In recent years, they have become more ambitious in NATO and they have been effective in reaffirming NATO's core priority of collective defense. But, in the EU—and in Europe more generally—the Central European countries have not been leaders in determining priorities or building partnerships, within or outside of their region, to accomplish their objectives. Too often, European leaders and politicians from outside the region have treated Central Europe as an afterthought, or assumed it will follow “Old Europe's” lead on economic policy and political priorities. A narrative of the region “catching up” politically and economically, both within Central and Eastern Europe and from the outside, has contributed to such attitudes. In Washington, these countries are often seen only through the security lens of NATO and as security consumers, while little thought is given to their role in steering Europe's economic and political decisions.

The Digital Transition

As CEE governments decide how to adapt to the global digital economy, they should keep in mind the many advantages they already bring to this task. As the seminal “Digital Challengers” study of ten Central and Eastern European countries by McKinsey & Company⁶ highlighted in 2018, the region possesses fundamental strengths that uniquely position it to capitalize on the next wave of digitalization. Some minor national variations aside, all CEE countries feature solid primary and secondary education systems; combined, they produce the largest talent pool of graduates in science, technology, engineering, and mathematics—the so-called “STEM” subjects.⁷ The region also features a high adoption rate of digitally enabled services, especially related to the financial sector and payments. Here, the lower rate of older technology legacies is seen to play a key role in making adoption of new digital technologies easier and more affordable. As noted, the share of digitalization within the overall

economy across CEE also approaches that of larger EU countries and, despite some room for catch-up, it has been growing at higher rates. These strengths are complemented by high-quality digital infrastructure and an emerging digital ecosystem with successful companies, large and small, that compete locally and globally.⁸

But, these advantages alone do not mean that the CEE countries will automatically succeed in this digital transition. Adapting to, and capitalizing on, the next phase of digitalization will be as essential to Central and Eastern Europe as it is to the future prosperity and competitiveness of countries around the world. This next phase will be driven by big data, the Internet of Things (IoT), and artificial intelligence (AI). As these technologies continue to permeate different sectors in a horizontal fashion, they promise significant productivity gains that hold the largest potential for future growth in Central and Eastern Europe. McKinsey & Company estimate conservatively that existing IoT solutions alone could contribute to up to €160 billion in GDP gains across CEE by 2025.

With these potential benefits also come new challenges, as alluded to above. While the impact on labor markets and the future nature of work remains a subject of debate, and will also include a range of positive effects, disruption and change are inevitable in the face of increasing automation. With their reliance on manufacturing and nascent start-up environments, Central and Eastern European countries face similar challenges. These include the need for education-sector improvements, reskilling programs, lifelong-learning initiatives, and broader educational and awareness-raising efforts that: promote entrepreneurship; equip entrepreneurs with fundraising, marketing, and other critical business skills; and advance competences of the future, such as critical thinking and collaboration. National policy measures to mitigate the harshest disruptions, and digitalization strategies to build on comparative advantages and seize the growth potential of digital transformations, will have key roles to play.

6 Jurica Novak et al., *The rise of Digital Challengers*, McKinsey & Company, November 2018, https://digitalchallengers.mckinsey.com/files/McKinsey%20CEE%20report_The%20Rise%20of%20Digital%20Challengers.pdf.

7 Ibid. According to McKinsey & Company, the “Digital Challengers” include Bulgaria, Croatia, the Czech Republic, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia, but do not include Estonia, which is considered part of the “Digital Frontrunner” group of countries.

8 Ibid.

However, a patchwork of eleven different national strategies for digitalization and entrepreneurship across the region will neither create the right synergies and market size for CEE digital players nor send the crucial signal for them to think big and think global. One key factor of success will be the ability of these countries—all of them in the European Union—to cooperate in this effort across the region. Together, these countries represent 20 percent of the EU population and 8.8 percent of EU GDP⁹. This is a substantial market, one that will have considerable powers of attraction for external investors. It will also provide a sizeable launching pad for new companies in the region seeking to become “unicorns” (a unicorn is a privately held startup company valued at more than \$1 billion), providing opportunities to scale up that do not exist within most relatively small CEE national markets.

Building regional cooperation is important not only for the economic benefits. It will send an important message to the rest of Europe (and to the United States) about the commitment of these countries to building economies of the future and working together to achieve such vital goals. But, if Central and Eastern Europe is to use the digitalization of its economy to grow its own influence and “soft power,” it must also choose a deliberate strategy of cooperation and define ambitious goals in some key sectors of the economy. These should play to Central and Eastern Europe’s distinct strengths, and have relevance to other potential partners or application to broader challenges, thus contributing to Central Europe’s influence in Europe and beyond.

To examine these assertions and the road ahead for Central Europe as it develops a digital economy, the following questions should be asked, and the following areas should be explored.

1) How can the region achieve cooperation between eleven diverse countries? What will be the requirements for establishing routine cooperation across national borders, across political groups, and despite different priorities? Just as in the start-up world, more advanced regional cooperation will likely fail without putting in place some degree of management and institutionalization. Succeeding in building cooperation will require identifying the mechanisms, frameworks, and institutions needed to facilitate that management and interaction. Countries

will have to think strategically about what role existing institutions—such as the EU, Visegrad 4, and 3SI—can play, whether they provide adequate platforms for such regional cooperation, or in what areas new mechanisms are required. It may be that different formats or institutions are required for cooperation on different issues or, more likely, that simultaneous tracks will foster cooperation. Structured engagement and involvement of key stakeholders from business and civil society will also be a key component of more effective regional cooperation to drive forward a digitalization strategy. Finally, coalitions of the willing and clusters of cooperation around certain technologies, rather than a consensus approach, may hold the biggest promise of advancing impactful regional cooperation. Leadership on such specific initiatives will have to come from within the region to succeed in the medium-to-long term.

2) What funding will be available to support the development of regional cooperation on digitalization?

EU funds for infrastructure have played an important role in the region’s economic ascent. As economies and societies adapt to digital transformations, the potential of smart public funding from the EU, regional, and national sources should be considered. Private investment capital and public-private partnerships should be leveraged in a concerted way to address key challenges, such as retraining and reskilling, as well as the adoption of digital technologies by small and medium-sized businesses. At the same time, political and other decision-makers will have to make the case for the economic benefit of such financial cooperation within national political arenas.

3) What specific areas of the digital economy should be the focus of this effort?

If Central and Eastern Europe is to succeed in this venture, it will require prioritizing certain sectors of the digital economy. Countries of the region should focus on areas where they have the biggest needs, but also the strongest comparative advantages. As discussed above, individual nations with existing strengths in specific areas could help lead clusters of CEE countries to advance regional cooperation in these fields.

Given the security threats facing Central and Eastern Europe, **cybersecurity** seems an obvious area of focus, especially given the presence of both EU and NATO cybersecurity agencies in the region (including the European Union Agency for Cybersecurity (ENISA), NATO Communications and Information Agency,

9 Jurica Novak et al., *The rise of Digital Challengers*.



Leaders of the Three Seas Initiative member countries and US President Donald J. Trump convene at the Three Seas Summit in Warsaw, Poland, on July 5-6, 2017. *Photo credit: Reuters.*

and NATO's Cyber Security Service Line). A recent report by the Kosciuszko Institute suggests that the region's specific cybersecurity challenges against the broader geopolitical backdrop offer an opportunity to play to its comparative advantages, assume industry and thought leadership for the benefit of Europe as a whole, and potentially foster economic growth.¹⁰ In this context, since the focus of the post-1989 CEE economy has been on manufacturing, cybersecurity for the IoT could also be a key specialization.

Infrastructure is another obvious priority, and one that can be advanced by energetic participation in the Three Seas Initiative and EU formats. But, this should not be simply the enhancement of old-style telecommunications infrastructure; this is about ensuring that the whole region develops the most advanced digital infrastructure, based on secure fifth-generation (5G) networks. It will also require building digitalization into other, more traditional infrastructure, including "smart" roads, energy systems, and cities.

¹⁰ Izabela Albrycht et al., "Securing the Digital DNA of the Three Seas Region," Kosciuszko Institute, October 28, 2019, <https://ik.org.pl/en/publications/securing-the-digital-dna-the-three-seas-region/>.

Energy is a key element in the region's economy, and digitalization could potentially contribute to both energy security and energy efficiency. Many Central European countries suffer from the legacy of communist-era energy systems, including insufficient alternatives to direct Russian gas, but also a lack of energy-conservation measures as seen in other EU countries. Digitalization of the energy sector can help to address these shortcomings by providing information about energy use and technology, to use energy in the most efficient way possible. In this way, Central Europe can contribute to solving an issue of energy security that has been divisive in Europe, and instead promote a way forward that enhances all of Europe's energy security.

Artificial intelligence is one of the priorities of the new European Commission. President Ursula von der Leyen has promised a proposal on ethical guidelines for AI during her first one hundred days. The development of AI promises to open many new opportunities in advanced economies. For Central and Eastern European economies focused on manufacturing, basic data analysis, and back-office service tasks, AI will pose significant disruptions. For that reason, developing the application of AI in the least disruptive manner should be a regional priority.

E-Government will undoubtedly emerge as one of the main responses to the threats democracy currently faces. Estonia is a leader in this field, and has demonstrated that online government can be transparent and secure. E-government programs like Estonia's e-Residency can also have a positive effect on talent attraction and digital innovation. As CEE used its post-1989 soft power in democratization to advise and encourage others around the world, so a strong and secure e-government movement could benefit the citizens of Central Europe and many others around the world. At the same time, public-sector adoption of digital tools for public administration serves as a powerful incentive for private-sector adoption, especially among small and medium-sized businesses, creating a multiplying effect for the economy.

To truly be effective in building a regional digital economy—and to ensure its leadership in the areas mentioned above—**Central Europe must also play an enhanced role in the European Union's effort to build the EU's digital capacity.** Von der Leyen has made clear that digitalization and digital policy will be a key priority of the new commission. How EU ambitions affect CEE goals in digitalization will be, in no small part, up to the region and its voice in Brussels. Central and Eastern Europe should seek to play a proactive role in determining EU priorities and legislation. The region can bring real assets—including soft power, as well as hard capabilities—to the EU discussion about the continent's digital future. But, in order to maximize its impact, it will have to coordinate across the region and identify regional priorities.

While many in Central Europe have focused on the EU's ability to provide infrastructure funds, the EU's policy dynamism in digitalization should not be ignored. Potential EU rules on e-commerce, platform liability, taxation of digitally derived revenue, cybersecurity standards, AI, research support, capital markets for innovation, and many other related issues could have a large impact on Central European businesses, including the many small and medium-sized businesses that earn revenue from the Internet. But, Central Europe can only steer EU policy if these member states work together. Central Europe needs to jointly identify its interests, and pursue a positive agenda on digitalization in both Brussels and key member-state capitals. Determining the objectives and strategy for achieving that agenda is a key task ahead.

Finally, **any CEE push toward building its digital future must consider the impact beyond Europe.** Will a larger regional market serve as a stronger foundation for CEE start-ups that seek a global client base or financing? EU-based innovators have long complained about the challenges of scaling up in Europe's limited capital markets, and the problem is even more of a challenge in the smaller, less wealthy CEE markets. What will this initiative say to foreign investors? Surely, it will make Central Europe a more attractive place to invest. But, will it also give the region more control over those investments, especially those that may raise issues concerning the influence of certain governments? Will it, for example, place the CEE region more in control of investments made under the Chinese Belt and Road Initiative, rather than vice versa?

What will the impact be on the region's relations with the United States? Currently, US policymakers rarely see CEE as a key interlocutor when it comes to trade or digital policy (unlike in security and defense policy in NATO). A coordinated regional drive toward an advanced digital economy could change this perception. Especially as the United Kingdom prepares to leave the EU, the United States is looking for new key bilateral partners within the EU. While not all US and CEE views and interests on digital policy will align, there will likely be some similarities that could reinforce this vital partnership. At the least, greater regional cooperation will raise the CEE profile on these issues for both US investors and policymakers. Determining the best direction for Central and Eastern Europe to pursue, and how that can be developed to create a higher international profile, will be another key task for those designing the region's digital future.

Upgrading the Three Seas Digital Pillar

This year promises an important opening for a new push among the Central and Eastern European countries to take regional cooperation on digitalization potential of the region to the next level. In January 2020, Croatia took over the rotating presidency of the Council of the EU, and has already promised to focus in part on connectivity, including digital connectivity. In June, Estonia will host the fourth annual summit of the Three Seas Initiative. The political platform of twelve countries between the Baltic, Adriatic, and Black Seas was launched in 2016 under the leadership of Poland and Croatia in order to boost economic development, competitiveness, connectivity, and cohesion of the region within the European Union. Since its inception, the 3SI has focused on regional infrastructure links in energy, transportation, and telecommunications/digital to advance interconnectivity, especially along a north-south axis in the Three Seas region.

If economic development has been a key driver of the initiative, its related geopolitical significance has not been far behind. The European Union and the United States engage with the 3SI in recognition of the vital importance that greater economic convergence and a stable, interconnected, and economically vibrant Central and Eastern Europe has for European stability and cohesion in an increasingly challenging geopolitical context. EU structural funds provide important funding

for 3SI projects, and the United States has invested political capital in the initiative.

While the transport and energy pillars of the 3SI have developed real momentum, with dozens of tangible projects, the digital pillar of the initiative—initially conceived as a set of telecommunications projects—has lagged far behind its more dynamic cousins. The reasons may be manifold. Most importantly, perhaps, digital infrastructure is, relatively speaking, a much smaller piece of the digital puzzle than physical infrastructure is to the energy and transportation fields. What has been lacking in the digital pillar is an adequate capturing of the policy and regulatory dimension that is the key to success in the digital transformation of Central and Eastern European economies.

Whatever the precise reasons for the underperformance of the digital pillar—which merits further examination to extract lessons learned—the June 2020 summit and its lead-up offer a unique opportunity to boost regional cooperation on digitalization in Central and Eastern Europe. For one, as the 3SI summit host this year, Estonia brings political clout, industry expertise, and thought leadership on digital issues to the table. The country approaches digital frontrunners in Scandinavia in terms of its digital economy and workforce. Its experience and expertise on cybersecurity and e-government initiatives are recognized throughout Europe. Thus, Tallinn is in a unique position to help lead discussions on the matter and midwife an upgrade to the 3SI digital pillar.

At the same time, the 3SI powerfully combines three drivers for regional cooperation on digitalization. It combines the countries of Central and Eastern Europe that face similar economic and digital transformation opportunities and challenges. The initiative is driven by the idea of greater economic cooperation and soft power for the region, but firmly anchored in Europe and the transatlantic relationship. At the same time, building economic and political resilience to better navigate a challenging geopolitical dynamic is at the very heart of 3SI.

With this as inspiration and motivation, the 3SI countries should think big and bold for the June summit, and signal their aspirations in the digital field by relaunching the digital pillar. Existing projects and priorities should not be tossed overboard but, rather, refined. On cybersecurity, for example, new thinking by several Central and Eastern

European think tanks as part of their Digital 3SI (D3SI) initiative offers new ideas and a solid basis to expand upon.¹¹ At the same time, the 3SI digital pillar needs a wholehearted embrace of broader digital strategy and policy coordination, one not limited to digital infrastructure. Greater policy coordination among the 3SI countries may pose its own challenges, but it also promises the greatest potential rewards from a more deliberate digitalization strategy for Central and Eastern Europe. Learning from each other, and better coordinating the region's influence and impact on digital policy matters in Brussels through a 3SI digital working group, could bring substantive progress. It would also help build up the muscle memory for regional coordination and exercise of 3SI soft power that is needed to sustain any such effort in the longer term. With its associated business forum and EU and US participation, the 3SI could also build on existing experience in bringing in other important stakeholders to ensure the region's digital discussion is one that also looks to a global digital economy. If the countries of Central and Eastern Europe are serious about developing their digital potential to the fullest—and using it to both enhance their soft power in Europe and build up resilience in trying geopolitical times—there is no way around more effective regional cooperation. The 2020 Three Seas Summit offers an opportunity to mobilize renewed political will and direction to that end.

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¹¹ Izabela Albrycht et al., "Securing the Digital DNA of the Three Seas Region," Kosciuszko Institute, October 28, 2019, <https://ik.org.pl/en/publications/securing-the-digital-dna-the-three-seas-region/>.



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