European Commission
Joint Research Centre
Institute for Prospective Technological Studies

INFORMATION
SOCIETY
POLICY RESEARCH
UNIT

ipts

International Conference

"Global ICT industry: changing landscape?
- The future of European ICT R&D"

19- 20 October 2011
Brussels

==Draft== agenda and initial list of points to be debated

Main purposes of the conference:

o   Identify and debate trends in the changing global ICT and ICT R&D landscape
o   Debate their impact on the EU ICT industry and consequences for research and innovation location and modes
o   Discuss implications for ICT R&D and innovation policies in Europe

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Day 1 (Wednesday 19 October 2011 - afternoon only)

13:30 -14:15 Conference Opening

Keynote speech (setting the overall economic framework for the conference)

14:15-16:15 Session 1: Changing global ICT & ICT R&D landscape

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o Location of R&D facilities: Where and Why? In Europe, outside of Europe? Where in Europe?
o Why are ICT R&D expenditures in Europe not increasing? Does this have a negative impact on competitiveness of ICT industry?
o Why are they so many more US than EU top global R&D investing ICT companies?
o How can the EU ICT industry better take advantage of internationalisation of ICT production and R&D?
o How are EU ICT companies positioning themselves on the markets of emerging economies (e.g. Brazil, etc.)?
o Is the role played by the EU ICT manufacturing industry in Europe decreasing (vs. ICT services)?
o (Why) did the US ICT industry apparently recover better from the crisis than the EU industry (e.g. Apple & Google v.s. Nokia)?
o What is the role of ICT R&D in non-ICT sectors of the EU economy?

Speakers:
- Thierry Van Landegem, Vice President, Bell labs, Alcatel Lucent
- Taylor Reynolds, OECD
- Alain Stekke, DG Information Society and Media, European Commission

16:15-16:45 Break

16:45- 18:45 Session 2: Changing telecom, media & internet R&D landscape
Chair:

> o   What is happening in the telecom ecosystem?
> o   Is the EU ICT industry regularly "missing" innovation steps in this domain (e.g. smart phones, apps stores – although the EU ICT industry is strong in underpinning mobile technologies)?
> o   And if so, why? How is this impacting other parts of the value chain?

Speakers:
- Pascal Périn, Assistant Vice-President, Strategic Analysis, France Telecom Orange
- Nokia speaker (name tbc)
- BSkyB speaker (name tbc)

18:45: End of Day 1

Day 2 (Thursday 20 October 2011)

9:00-11:00 Session 3: Changing ICT manufacturing R&D landscape

> o   Can Europe let its ICT manufacturing relocate to other regions of the world?
> o   Should the EU industry focus mainly on niche high value added markets?
> o   What is the role and importance of the "semi-conductors industry"?

Speakers:
- Gabriel Crean, Vice-President, CEA Technologies, CEA, France
- William K. JEE, Vice President, ETRI, South Korea
- Malcolm Penn, Chairman and CEO, FutureHorizons, UK (tbc)

11:00-11:30 Break

11:30 – 13:30 Session 4: Changing computer services and software R&D landscape

> o   What is happening in the Software industry?
> o   Future of e-services
> o   Cloud computing: another disruptive technology?

Speakers:
- Dr. Martin Przewloka (cc), Senior Vice President, SAP Research Internet Applications & Services
- Microsoft speaker (name tbc)
- Indian National Institute of Science, technology and Development Studies (NISTADS) speaker (name tbc)

14:30-14:30 Lunch

14:30- 16:30 Session 5: Changing policies?

Focus: Industrial policies, including R&D&I, linking back to framework presented during the opening session

o How to strengthen innovation capacity of the EU ICT industry?
o What is missing to fill the "innovation gap" (between R&D and commercialization)?
o How should policies help (at EU, national, regional levels)?
o [How] can increased public funding of ICT R&D have a strong (vs. marginal) leveraging affect on private R&D investments?

Speakers:
- Ambassador Ronaldo Sardenberg, Chairman of the Brazilian regulatory agency, Anatel
- Tom Togsverd, Director, General Danish Federation for ICT and Electronics/Digital Europe
- European Commission (DG INFSO, ENTR, RTD) speaker (name tbc)
- European Investment Bank speaker (name tbc)

16:30 Conference closing

16:45 End of Day 2