

# An ICT market visit to the Baltic States

19 – 23 April 2010



**Organisation fee** (at subsidised rate): £1,000 inc VAT

**Eligibility:** ICT companies from across the UK

**Subsidy:** up to four nights hotel accommodation paid for eligible London companies

**Estonia, Latvia and Lithuania** have experienced rapid development of the ICT sector within the past decade. The sector is prioritised by the Baltic governments as a driver of growth and opportunities for the economy and the public, with an increased emphasis during the economic downturn. Specialisation and development levels of the sector vary between Estonia, Latvia and Lithuania but all Baltic States share an enthusiasm for creatively adopting potential ICT offers for business-to-business, corporate-to-individual and state-to-citizen communications. Indeed, all three countries score highly (13th to 36th) on the World Economic Forum's E-Government Readiness Index (insead.edu). Without the extensive uptake of IT solutions, it is unlikely that Estonia, Latvia and Lithuania could have achieved their global ranking of 24th to 27th in the World Bank's Ease of Doing Business chart (doingbusiness.org), which rates one of their particular strengths as trading across borders.

**ICT manufacturing** encompasses production of telecom equipment; computers, laptops and accessories; electronic components and PCBs; commodity appliances; and magnetic and optic data carriers and data transmission equipment.

**ICT service operations** include wholesale of information and communication technology; software design, maintenance, integration, consulting and publishing; telecommunications; data processing; web-hosting, website operations; and restoring computers and communication devices.

**For market overviews and a detailed itinerary, please see next pages.**

## What can the Baltic States offer UK companies?

- Openness to trade and partnering
- Very good knowledge of English
- Similar work culture to the UK
- Good ICT infrastructure: EDGE, 3/3.5G, WiMAX, WiFi, high broadband penetration
- Well-educated specialist labour force
- Good links with businesses in the Nordics, Russia and other post-Soviet states
- A safe business and political environment (EU, WTO and NATO memberships)

## To register for this market visit contact:

**Nicola Bridgett**, International Trade Adviser  
UK Trade & Investment London

**Tel:** +44 (0) 20 7234 3036 / +44 (0) 7779 717 283

**Email:** nicolabridgett@uktilondon.org.uk



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## Strengths and opportunities by country

**Estonia** is among the world's pioneers in e-Government. The ICT-related programmes the state has initiated to advance its e-society have reduced costs and paperwork and enhanced convenience across the society: 98% of bank transfers and 91% of income tax declarations are made electronically, government meetings have been paperless since 2000, 100% of schools and government organisations have broadband connection, almost every individual has an ID-card which can among various other applications be used for electronic identification and signing digitally. ICT has also been implemented for m-services, e-health, e-police, e-parking and even e-voting in local government, parliament and European Parliament elections.



World leading P2P-based programmes Skype and KaZaa were developed in Estonia, where Tallinn is home to Skype's development centre which employs 300 people from across the globe.

Following domestic and international research, the Estonian Development Fund - an influential provider of foresight - recently recommended that the Estonian ICT sector specialise in the following areas: education, health, industry, energy, financial services and ICT security. The competencies that Estonians need to develop over the next ten years include internet services & GRID, microelectronics components, NBIC convergence, alternative foundations of computer science, and interoperation of communication systems.

**Latvia's** most significant ICT sub-sector is software design. Software maintenance, integration, consulting and training are other rapidly growing areas. Latvian software-development companies have gained significant experience from large-scale projects undertaken for major international companies.

Business-related research activities are conducted by various Latvian universities and institutes.

The communication services and IT infrastructure is in line with the latest technologies. 3G telecommunications, broadband, WiFi and other modern-day services available in Latvia all help to facilitate overall e-development in the country (e-projects on a government level, e-commerce and IPTV etc).

Continues...

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Latvia offers a wide range of opportunities to UK companies, particularly in the following areas:

- Products, services and expertise in e-government, e-signature, e-health, e-education, e-libraries and e-museum field
- Mobile marketing, mobile content and other voice and data value added services etc
- Customised ICT products for specific sectors and industries such as transport, textiles and construction
- EU funding available for IT development and innovative projects
- Next Generation networks and supportive products
- Improvement of voice telephony networks compatibility to improve the quality of the calls from one operator network to another
- Marketing and other web-design niche areas

**Lithuania's** ICT sector is rapidly moving toward western forms and standards, in terms of technical and business infrastructure. Significant new opportunities are opening up for complex IT solutions and services in Lithuania. The telecommunications sector, especially mobile telecommunications, has been growing at fast-pace for several years and the number of internet users is rising significantly. Lithuanian IT companies are actively co-operating with foreign partners including Bentley Systems, TietoEnator, IBM and Microsoft while others have chosen Lithuanians as partners in software development. Computer Sciences Corporation and Barclays Bank have established their IT support centres in Lithuania recently.

According to the World Economic Forum's *World Competitiveness Report 2008-2009*, Lithuania features the highest mobile subscription rate of 138% worldwide. According to [www.speedtest.net](http://www.speedtest.net), Lithuania has the world's fastest internet upload speed and ranks fifth in global internet download speed.

Lithuania aims to become the leader of the knowledge industry by leveraging its intellectual potential in IT, laser technology, biotechnology, and nano and materials sciences to account for 25% of its GDP and 50% of its exports by 2015. Major opportunities in the Lithuanian ICT sector lie in the following areas: e-business solutions, IT virtualization and architecture (SOA), remote work opportunities, e-government, e-health and other electronic fields, mobile services, public services for business and high-tech manufacturing and assembling.

Please see next page for a detailed programme outline.

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## Programme Outline

### 19 April: Tallinn

- Introduction to the Baltic States, specifically the Estonian ICT sector with presentations on the sector in general, visit to the Estonian ICT demo centre, meeting with the board and management of the Estonian ICT association, meeting with the sub-sectoral specialists and trade development programmes managers as appropriate (including e-health and e-government)
- Networking reception hosted by HM Ambassador to Estonia

### 20 April

- Speed-meeting with match-made Estonian businesses

### 21 April: Riga

- Setting-up a stand/exhibition layout for the Baltic IT&T Forum
- One-to-one meetings with Latvian companies according to the target profiles specified by participating British delegates and interest shown by the Latvian companies
- Networking reception hosted by HM Ambassador to Latvia

### 22 April

- Baltic IT & T Forum: British speaker presentation, British stand at the event, opportunities for networking and further meetings
- Travel to Vilnius
- Networking reception hosted by HM Ambassador to Lithuania

### 23 April: Vilnius

- Introduction to the Lithuanian ICT sector with presentations on the sector in general, meeting with representatives of Lithuanian IT association and meeting with representatives of Lithuanian Development Agency
- Speed-meeting with match-made Lithuanian companies

*UK Trade & Investment International Trade Advisers will be available to provide support and industry knowledge for the duration of this market visit.*

#### **Organisation fee** (at subsidised rate): £1,000 inc VAT

UK companies taking part in this market visit will have to pay an organisation fee of £1,000 via our Overseas Market Introduction Service. Upon joining, delegates will be required to submit profiles of the types of local companies that they would like to meet on the market visit. The organisation fee includes meeting arrangements according to specific partner profiles (invitation for meeting sent to at least three local companies in each Baltic market), meals mentioned in the programme above, and hotel booking service in Tallinn, Riga and Vilnius. UKTI Baltic Region will not be able to provide support to delegates with regard to their additional food, travel and hotel expenses, except where a subsidy applies.

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