i2010 - ANNUAL INFORMATION SOCIETY REPORT 2007

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Resumen

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Palabras clave

Palabra clave 1 (español/Spanish). Palabra clave 2(español/Spanish). Palabra clave 3(español/Spanish). Palabra clave 4(español/Spanish).

Abstract

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Keywords
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1 Introduction

i2010 is the Commission's initiative for information society and media policies. It ensures coherence across the Commission's information society and media policies and seeks to reinforce the important contribution of information and communication technologies (ICT) to the performance of our economies and the renewed Lisbon Strategy. i2010 operates in a fast changing environment and therefore requires regular up-dating and fine-tuning. The present report represents the second such up-dating and prepares the ground for a more extensive mid-term review in 2008.

The overall balance sheet for 2006 is positive.[4] The main indicators are moving in the right direction, with ICT remaining a major factor in driving growth and innovation. The scepticism that held back ICT investments four or five years ago has been replaced by greater confidence in our ability to develop and deploy ICT applications to our economic and social advantage. As regards policy actions, the different EU level initiatives announced at the launch of i2010 in June 2005 are well on track. At Member State level, all the 2006 National Reform Programmes put more emphasis on mainstreaming ICT policies.

The Commission implements i2010 in close co-operation with the Member States through the i2010 High Level Group. In 2006, as part of its industrial policy, it launched an ICT Task Force[5] representing industry and civil society to check whether its current

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4 This assessment is based on EU25. Data on EU27 will be available from 2007.

5 http://ec.europa.eu/enterprise/ict/taskforce.htm (Visited 25-May-07)

policies are favourable to the competitiveness of the ICT sector or whether some adjustments are needed. This work and the report of the Task Force in particular lead the Commission to conclude that the present policy framework is broadly right. The Commission will follow up the Task Force recommendations, where not already in line with existing policies, with proposals for specific actions.

2 Developments in the information society during 2006

Six years after the burst of the Internet bubble, the information society is on a steady growth path. A decade of investment in ICT is bearing fruit, fuelling innovation in ICT areas and transforming the EU into a knowledge-based economy. Since 2005, the ICT sector has become increasingly driven by the expansion in the software market and relatively less by the electronic communication segment. This reflects innovation trends requiring more pervasive software products. Large sales in systems software and eBusiness applications indicate that businesses are adopting new and more mature eBusiness solutions, even if these new investments may still be limited to large companies or early adopters of advanced eBusiness solutions.

Users are quickly embracing new services brought about by convergence. Many Member States now have high levels of broadband adoption, which in turn stimulates the development of innovative advanced services. The transformation of the content market is already apparent in the growth of online music sales and new digital devices. Movie distribution and online TV are also advancing. The move from traditional content distribution to online availability is accompanied by an explosion of user-created content.

The public sector is not lagging behind. Online public services are getting more mature and producing visible efficiency gains: more services have been put online, the available services have become more sophisticated and more Europeans deal with the public sector online. Public administration is leading the way and health and education are closing in.

The EU can build on these achievements to pursue its growth and innovation policies and all Member States recognise the key role of ICT in achieving the Lisbon goals. Compared to 2005, the Member States' 2006 National Reform Programmes put more emphasis on mainstreaming ICT policies.[6] ICT are identified as drivers of innovation, as tools for transforming government and business models and as instruments for improving our quality of life. Broadband, eGovernment and digital literacy - the priority areas identified in 2005 - show good if somewhat uneven progress among the Member States. ICT research and development, trust and security issues, and measures to reduce administrative costs for businesses and administrations emerge as new priorities in a number of countries. There are still disparities between the Member States, but in some areas, for instance broadband take-up, emergence of new services or eGovernment, the leading EU countries are also world leaders.

2.1 *i2010 implementation in 2006 and actions for 2007/2008*

2.1.1 *Information space*

Digital convergence is finally coming of age. Although the process is by no means completed, convergence is now very much a reality. Policy makers need to ensure that the legislation impacting on converging sectors provides the legal certainty needed for stakeholders to innovate. The aim is to respond to technological changes in a way that promotes competition, consolidates the internal market and benefits users. A review of the main policy issues at stake indicates that the overall legal and regulatory

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6 Implementing the renewed Lisbon agenda – A year of delivery, COM(2006) 816, 12.12.2006

framework is favourable for the further development of convergence.[7]

The majority of actions planned in the first pillar of i2010, to create a single European information space, have been launched. In 2006 the regulatory framework for electronic communications has been reviewed and amendments will be tabled by mid 2007. The discussion will continue in 2007 with a green paper on the future of universal service in electronic communications. Better and efficient use of radio spectrum as an important element of the regulatory review has been promoted, including by introducing more flexibility[8]. This will continue with proposals on common approaches to collective use of spectrum and to the digital dividend. The Commission will also address the concerns and threats to privacy revealed by its 2006 public consultation on radio spectrum identification (RFID).

The Commission will add further building blocks to European audiovisual policy, advancing the debate on media pluralism and media literacy. The new MEDIA 2007 programme, covering the period 2007-2013, will continue financial support for the European audiovisual sector. Furthermore, the Commission will outline measures to support the introduction and take-up of mobile TV across the EU.

With the arrival of new online services, market players are entering a learning process to develop new, multilingual and innovative content. The Film Online Charter, initiated by the Commission and agreed by business leaders in 2006, is a first milestone in this respect. The Commission is now exploring how the Charter can pave the way for a broader policy on online content to encourage the development of high quality and innovative online content.

On the policy side, the next challenge is to ensure that users are confident in the use of new services. In 2006 the Commission

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7 "The challenges of convergence", working paper for the i2010 High Level Group, 12.12.2006

8 Rapid access to spectrum for wireless electronic communications services through more flexibility, COM(2007) 50, 8.2.2007

proposed a regulation to limit international roaming tariffs for the users of mobile services and in February 2007 it has launched a public consultation on the review of the consumer protection acquis at the European level.[9]

Finally, the Commission complemented its new strategy for a secure information society by a communication on fighting spam, spyware and malicious software and will address cybercrime in 2007. It will evaluate the functioning of the European Network and Information Security Agency (ENISA) to decide if the agency's mandate should be extended and monitor the implementation of security measures to assess the need for additional action by 2008.

In 2007-2008, the Commission will:

- Make proposals for the review of the regulatory framework for electronic communications, launch a debate on the future of universal service and continue to develop a coordinated framework for a flexible and efficient management of spectrum, in particular with respect to collective use of spectrum and the digital dividend;
- Assess policy needs for media literacy and propose comprehensive approaches to RFID and to mobile TV;
- Promote a comprehensive approach to the development of high quality innovative content;
- Follow up on the security strategy with a communication on cybercrime, evaluate ENISA to decide on a prolongation of its mandate and assess the need for additional action in the security field (2008).

2.1.2 *Innovation and ICT R&D*

Boosting research and innovation is at the centre of the Commission's strategy for growth and jobs. The EU has a target of 3% of its GDP dedicated to R&D, 2% of which should come from the private sector. The EU is still far from this target, with some 1.9% of GDP spent in R&D. The 2006 Annual Progress Report on Lisbon stresses that all Member States have set a national R&D investment target and that if all of these targets are met, the EU will reach a R&D level of 2.6% of GDP in 2010.

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[9] Green Paper on the Review of the Consumer Acquis, COM(2006) 744, 8.2.2007, http://ec.europa.eu/consumers/cons_int/safe_shop/acquis/index_en.htm (Visited 25-May-07)

ICT industries account for a large share of aggregate business R&D spending (26% in 2003[10]). As emphasised by the ICT Task Force, increasing ICT R&D expenditure is key if the EU is to reach the 3% objective. European research and innovation receive a major boost with the launch of the Seventh Framework Programme for Research (FP7) that will run from 2007-2013. The EU will invest over €9 billion in ICT, the largest single item in FP7. The Commission will continue to cooperate with the nine European ICT Technology Platforms set up to strengthen partnership with industry and achieve a critical mass of research in strategic fields. Two of the platforms will provide the basis for Joint Technology Initiatives (JTIs), a new type of initiative that will pool EU, Member State and industry funds into public-private research partnerships to boost European cutting-edge research.

The EU is also committed to improving the framework conditions for innovation[11], and has identified 10 key actions to this end.[12] The Commission is working on identifying relevant policy gaps to ensure that the EU's standardisation policy for the ICT sector meets the challenges of today's fast moving markets. It will also encourage public authorities to cooperate and reinforce the role of the EU public sector as a first buyer of innovation and/or pre-commercial products and services, thereby opening up new lead market opportunities for among others ICT-based products and services.

Innovation does not only arise from research but is increasingly driven by users of technologies or organisational change. The ICT policy support programme (ICT PSP) in the Competitiveness and Innovation Programme (CIP) stimulates innovation and competitiveness through promoting wider uptake and best use of ICT by citizens, governments and businesses, in particular SMEs. In 2007 the ICT PSP will focus on the role of the public sector as

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10 Commission Services estimate based on OECD/Eurostat survey of R&D expenditure 2003

11 An innovation-friendly, modern Europe, COM(2006) 589, 12.10.2006

12 Putting knowledge into practice: A broad-based innovation strategy for the EU, COM(2006) 502, 13.9.2006

a user and will address three main themes: efficient and interoperable eGovernment services; ICT for accessibility, ageing and social integration; and, ICT for sustainable and interoperable health services. In 2007 the Commission will continue the review of the policy needs to promote and facilitate eBusiness in the framework of eBusiness W@tch and eBSN[13]). It will respond to the call of the ICT Task Force to design a long-term eSkills strategy, including the link with education and training.

3 References

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13 http://www.ebusiness-watch.org/ and http://ec.europa.eu/enterprise/e-bsn/index_en.html (Visited 25-May-07)