SEPE news

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The role of SEPE in the Greek market

The Federation of Hellenic Information Technology & Communications Enterprises (SEPE) is a non-profit organisation, established in 1995.

Over 400 companies are currently members of SEPE and collectively they hold more than 95% of the country's turnover in the Information Technology and Telecommunication Industry.

The main objectives of SEPE are to promote Information and Communications Technologies (ICT) in Greece and to enlarge ICT Industry's market. SEPE also represents the interests of the Greek ICT Enterprises vis-à-vis the Greek Government, the European Commission and other bodies of influence.

SEPE's IMPERATIVES

SEPE is an advisor to many national and international bodies, as well as the Government, the Academic and Research Communities, Business Bodies and Fora. Utilising this role, SEPE is currently lobbying for:

- The rise of the public awareness on the importance of ICT and the transition of our society to an information society for all.
- The modernisation of Public Administration with the use of Information Technology.
- The development of a high - speed telecommunication network to address and assist the current Communication Infrastructure
- The design and implementation of programs aimed at addressing the needs of Small and Medium Enterprises (SMEs) and improving their competitiveness in the market
- The engagement of Information Technology into all levels of the educational system and the evolution of computing literacy and technology expertise.
- The cooperation between the ICT market and the educational system in order to coordinate the design of the study curricula according to the market needs.

Joint Ventures, International Alliances and Investment in the ICT Industry

SEPE represents the interests of the Greek ICT Enterprises via its membership to the World IT and Services Alliance (WITSA), the European IT Services Association (EICTA), the International Telecommunication Union (ITU) and other bodies of influence.

SEPE considers joint ventures of Greek companies with international ones to be a key contributor in promoting its members' interests and enlarging the industry's market. To this end, SEPE is encouraging and supporting collaboration of Greek enterprises with others in the Balkans and Mediterranean region via fairs, business projects and export promotion programs.

The Greek economy and the enterprises of the ICT Industry will focus their efforts on two main challenges:

1. The first challenge is to capture the opportunity of leveraging funds and investments for the modernization of the Greek Enterprises, especially SME's. This effort will strengthen the ability of the Greek ICT industry to participate in joint ventures and international alliances from a much better position than now.
2. The second challenge, which comes as a second step, is to expand more aggressively the relative businesses and investments outside Greece mainly in the South East European area.

SEPE's Committees

Committee for Public Sector ICT Projects for the Information Society

Committee for Private Sector Projects

Committee for e-Communication S

The main objectives of SEPE are to promote Information Technology and Telecommunications in Greece and to enlarge the ICT Industry's market

Information and Communications Technologies in Greece

EITO estimates that the growth rate of the information technology and communications market in Greece in 2006 will increase to 3.7% from 3.6% in 2005. It is probably one of the few years that EITO estimates the growth rate of the Information Technology market in 2006 to exceed the respective rate of Communications development

The growth rate of the entire Information and Communications Technologies (ICT) market in Europe, according to the European Information Technology Observatory (EITO) for 2006, is estimated to reach 3.2% from 3.7% in 2005, while in 2007, it is expected to reach 3%. In 2005, the total value of the global Information Technology and Communications market reached €1.95 trillion. A percentage of 33.8% came from Europe, 28% from the USA and 14.7% from Japan (Figure 1). In 2006, the value of the global ICT market will climb to €2.027 trillion. An amount of €919 billion will derive from the Information Technology market and Europe will contribute by €325.6 billion, which equals a share of 35.5% in the global Information Technology market. The rate of the global Communications market for 2006 is estimated to be €1.1 trillion, with an amount of €355 billion deriving from the European market and its share will reach 32.1%.

European Union

EITO's executives are optimistic for the ICT sector during 2006. More specifically, the Peer-to-Peer (P2P) model is considered to be a catalyst in the creation of new generation technological services, such as security, outsourcing services, development of international standards, mobile services, e-government, e-business for small enterprises, wireless networks, WIFI and WIMAX services, digital television, transmission of image, sound, video and data through mobile phones, e-commerce markets. Analysts expect larger benefits for technology companies, as these sectors are now mature, despite the fact that in 2006, the total growth rate of the European ICT market will fluctuate from 3.2% to 3.7% in 2005. For 2007, predictions are more conservative and there is a possibility for a 3% growth rate. The new European digital strategy (i2010) forecasts investments in broadband networks, development of digital content and expansion of relevant services, focus in research and innovation, creation of common European channels for the exchange of digital content, development of digital television without local restrictions.

In 2006, the rate of the European Information and Communication market is expected to reach €680 billion. In detail, the EU member-states' activity in the global information market in 2006 will reach 35.4% and in the global communication market 32.1%. 60% of the European citizens use Internet from home or their work place. It is expected that in 2009, 40% of European households with broadband connection will be paying for certain digital content service (movie, games, music etc.). This can also be achieved through wireless mobile networks. Wireless networks (3G, WIFI, WIMAX) are also expected to alter the customers' habits. Simultaneously, Voice over IP is an appealing advantage in the new technologies area. It is estimated that at the end of 2005, there were 5 million telecommunication connections through broadband networks in Europe. This number is expected to rise, as increasingly more telecommunication companies launch similar services. Furthermore, a significant opportunity for development in Voice over IP is the spread of its use in enterprises, particularly small and medium-sized.

UK is expected to have the greater growth rate of the ICT market in Europe of the "15" with 4.2%, while Austria follows with 4.1%, Spain and Ireland with 4% and Greece with 3.7%. The most dynamic countries among the 10 members of the EU, according to EITO, are Lithuania, Poland, Slovakia, the Czech Republic and Estonia (Table 1).

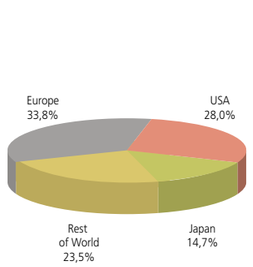


Figure 1. The Global ICT market, 2006

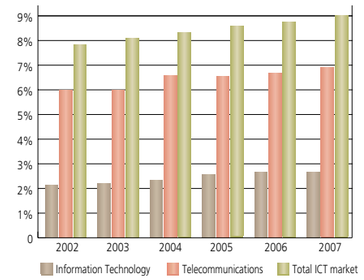


Figure 2. The Greek ICT market, in € b.

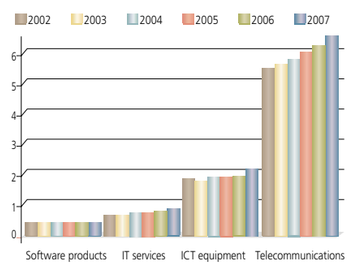


Figure 3. Analysis of the Greek ICT market, in € b.

Europe	2003	2004	2005	2006	2007	2004/03%	2005/04%	2006/05%	2007/06%
Austria	13,699	14,101	14,553	15,149	15,709	2.9	3.2	4.1	3.7
Belgium/Luxembourg	17,248	17,714	18,159	18,546	19,091	2.7	2.5	2.1	2.9
Denmark	12,126	12,556	13,026	13,378	13,702	3.5	3.7	2.7	2.4
Finland	9,243	9,521	9,813	10,073	10,340	3.0	3.1	2.6	2.7
France	88,282	90,918	94,020	96,817	99,905	3,0	3.4	3,0	3.2
Germany	125,430	128,862	131,784	134,526	137,156	2.7	2.3	2.1	2,0
Greece	7,543	7,806	8,087	8,390	8,752	3.5	3.6	3.7	4.3
Ireland	5,936	6,183	6,407	6,664	6,903	4.2	3.6	4,0	3.6
Italy	65,158	67,297	69,164	70,849	72,514	3.3	2.8	2.4	2.4
Netherlands	30,638	31,391	32,517	33,572	34,471	2.5	3.6	3.2	2.7
Portugal	8,401	8,727	9,107	9,345	9,622	3.9	4.4	2.6	3.0
Spain	35,976	38,730	41,286	42,920	44,361	7.7	6.6	4,0	3.4
Sweden	20,741	21,255	21,908	22,564	23,168	2.5	3.1	3,0	2.7
UK	111,565	115,823	119,929	124,932	129,255	3.8	3.5	4.2	3.5
Czech Republic	4,927	5,459	5,770	6,067	6,360	10.8	5.7	5.2	4.8
Estonia	0,656	0,750	0,803	0,843	0,877	14.3	7.0	5.0	4.1
Hungary	5,458	5,949	6,394	6,674	6,917	9.0	7.5	4.4	3.6
Latvia	0,788	0,917	1,000	1,069	1,112	16.5	9.1	6.8	4.0
Lithuania	0,963	1,224	1,441	1,463	1,489	27.0	17.8	1.5	1.7
Poland	11,599	13,012	14,456	15,540	16,418	12.2	11.1	7.5	5.6
Slovakia	1,869	2,126	2,290	2,465	2,602	13.7	7.7	7.6	5.6
Slovenia	1,226	1,360	1,437	1,493	1,573	10.9	5.6	4.0	5.3
EU	579,472	601,681	623,351	643,339	662,297	3.8	3.6	3.2	2.9
EU 15	551,986	570,884	589,760	607,725	624,949	3.4	3.3	3.0	2.8
Norway	8,910	9,311	9,631	9,910	10,175	4.5	3.4	2.9	2.7
Switzerland	19,106	19,515	20,061	20,625	21,215	2.1	2.8	2.8	2.9
EU 15 + Norway and Switzerland	580,002	599,710	619,452	638,260	656	3.4	3.3	3,0	2.8
Bulgaria	1,375	1,757	2,046	2,164	2,327	27.7	16.5	5.7	7.5
Romania	2,964	3,807	4,368	4,822	5,140	28.4	14.7	10.4	6.6
Europe	611,827	636,071	659,457	680,860	701,154	4.0	3.7	3.2	3.0

Table 1. The European ICT market/ country, in € m.

Greece

The Greek Information Technology and Communications market's value in 2006 is estimated to reach €8.39 billion, with an amount of €2.15 billion deriving from Information Technology and €6.23 billion from Telecommunications. The Information Technology market in 2006 tends to increase by 6.3%. The course in the Communications market is also ascending, where an increase of 2.9% is expected. EITO estimates that the growth rate of Information Technology and Communication market in Greece in 2006 will grow to 3.7% from 3.6% in 2005 (Figure 2). It is probably one of the few years that EITO estimates the growth rate of the Information Technology market in 2006 to exceed the respective rate of Communications development.

In detail (Figure 3), the computer systems sales are expected to reach €768 million, with an increase of 5.3% from 1.7% in 2005. The greater increase is expected in servers and laptops. The software sector is expected to perform sales ranging from €394 to €367, marking in 2006 an increase of 7.3% from 6.5% in 2005. The total Information Technology and Communications equipment is expected to reach €1.945 billion in 2006, from 1.9 billion in 2005.

DR. KOSTAS KARAMANLIS

Greece in the Digital Age

We have now reached an advanced stage of the Digital Age. The technological miracles of the last decade have become an integral part of our everyday life and the way in which we communicate. They are providing much faster solutions to the problems we were facing until only recently. The rapid changes in ICT applications, computer networks, but also telecommunications networks have become part of our daily activity. In education (e-learning), in public administration (e-government), in health (e-health), in trade (e-commerce), the catalytic contribution made by computers and their applications is enhancing the quality of service provision. Recent developments, as well as the coupling of technology with the media, give rise to advanced services which benefit the citizen, such as digital television, where major activity is already underway, creating substantial change in terms of both quality and ease of use. The facilities offered by technology play a leading role in all aspects of our lives.

Within this new, dynamic environment Greece is seeking to tap as widely as possible the potential offered by new technologies, following an integrated strategy and taking decisive steps forward. Today, Greece's efforts to conquer the new age are already bearing visible fruits for citizens and are recognised by the international community. An expression of this recognition, which is particularly symbolic but also of great substantial value to our country, can be seen in the establishment of the European Network and Information Security Agency (ENISA) in Herakleion, Crete. This bears witness to the IT progress we have achieved through our educational and research centres (universities, research foundations, the Foundation for Research and Technology), but first and foremost to our great human potential. At a time when the issue of security in telecommunications and computer networks is so much to the fore, it is of particular importance that the international community's attention is focused on Greece.

As set out in the Lisbon Strategy, the need for the digital revolution is evident. In the new digital economy, ICT can and should act as the driving force towards achieving the triple objective of sustainable development, boosting employment and improving the everyday life of the citizen

Our policy hinges on recognition of the fact that information and computer technologies act as a powerful motor for development and employment. Indeed, according to the European Commission, one quarter of the increase in the EU's GDP and 40% of its increased productivity can be ascribed to these technologies. Today, no-one can afford to overlook the fact that the countries which are able to use new technologies, in order to open up the structures and functions of public administration to their citizens and promote e-governance, are the champions of economic performance and competitiveness. Particularly within the EU, which takes development, employment and prosperity as its cornerstone, as set out in the Lisbon Strategy, the need for the digital revolution is evident. In the new digital economy, ICT can and should act as the driving force towards achieving the triple objective of sustainable development, boosting employment and improving the everyday life of the citizen.

Within this new reality, it is common knowledge that unfortunately until recently our country had neither the vision nor the planning to allow it to play a leading role. The lack of sound organisation and the failure to exploit opportunities to diffuse ICT, added to limited investment in research, development and training, were the main reasons for Greece's poor performance in digital convergence. For years, we were losing ground and were missing major opportunities for development and prosperity. This situation had to be reversed.

To make up for this lost ground, from the very moment we came to power we started to take major steps to involve the citizens as widely as possible in the digital age and to upgrade the state's technological infrastructure and services. Substantial progress has been achieved over the last two years in promoting ICT through a series of activities, the main driving force being the Information Society Operational Programme. This, in spite of the fact that in the early stages of the programme there was a lack of cohesive planning and delays in implementation, the result being that the measures which needed to be taken to prompt the

DR. KOSTAS KARAMANLIS

Greece in the Digital Age

technological modernisation of the country failed to come about at the desired speed. Implementation of the Information Society programme has accelerated considerably. From 12% in March, 2004, public expenditure has now reached 37%. The percentage of contracted projects has increased from 19% to 55%. ICT investment over the last two years shows that our country is now following a new development model with clearly improved prospects.

Certainly, in order to accelerate the use of new technologies we need to improve

Our priorities, the priorities of the new governance, are anchored in speeding up our country's development, and in equal treatment for all citizens. They are anchored in the conviction that all Greeks are entitled to equal access to the opportunities provided by the new age

accessibility, broadband infrastructure as well as the services which strengthen digital convergence and broaden the creative prospects of the economy. More than 40 digital services will soon be available to the citizens of Greece, the main aim being to use ICT to enhance their daily life. And, of course, special attention has been paid to the regions through the "Digital Local Government" programme which includes activities intended to familiarize citizens with the use of new digital services within local society.

At the same time, we have laid great store by the dissemination of reasonably priced broadband internet access, primarily targeting the remote regions and the young generation. All universities and technological institutes provide to their students high speed Internet access, whilst primary and secondary schools continue to be connected apace. We are already developing broadband infrastructure in 70 large regional cities. Moreover, as we had promised, cheap, fast Internet has already become a reality through the "Diodos" programme for our young generation.

Our strategic aim in this is to improve the quality of public administration and to cut through red tape. This is why we focused on interconnecting public services and agencies and providing both citizens and business with new services. We expedited the completion of the "Syzefxis" national public administration network, which provides 3,000 clients with high added value advanced telecom services. "Syzefxis" is already up and running, making a decisive contribution to the promotion of e-governance. Public administration is now adapting to these new developments, to ensure that it is able to quickly and efficiently meet citizens' needs.

Our political will and our dedication to the objectives we have set are the basic components in our country's progress and its convergence with the technologically advanced members of the European Union

Considerable efforts are already being made against this backdrop. The work being put in by the Ministry of Economy and Finance to modernise and to provide advanced electronic services shows that there are examples of electronic services which enjoy high levels of public acceptance. After many years of indifference for Taxis, the technological infrastructure in the tax offices has already been hugely upgraded with the installation of 8,000 new computers from our Olympic inheritance. This is a particularly successful example of how we have turned the Olympic Games to good account. Our citizens now enjoy more rapid service, whilst at the same time productivity in the public administration has improved. But use of the Internet is providing an even greater potential. Most of the citizens' basic transactions with the tax office can be dealt with electronically, thanks to the new TaxisNet. Over the last year there were almost 2.5 million on-line transactions, a 67% increase compared with 2003, which in practice means that an equivalent number of visits to the tax office have been avoided. The facts speak for themselves, since there has been a drastic reduction in the time people spend when dealing with public authorities, whilst national economy also benefits.

Our priorities, the priorities of the new governance, are anchored in speeding up our country's development, and in equal treatment for all citizens. They are anchored in the conviction that all Greeks are entitled to equal access to the opportunities provided by the new age. And it is this conviction which gives palpable content to the concept of the Information Society -a society which concerns all citizens, which bridges the computer illiteracy gap rather than making them wider.

So far, we have achieved much of great importance. But we still have a long way to go. That is why we need drastic actions, consensus and a national strategy in order to achieve our common aims. Our political will and our dedication to the objectives we have set are the basic components in our country's progress and its convergence with the technologically advanced members of the European Union. Building on the steps we have already taken, we are moving forward to meet the commitments we have made to our people -towards strengthened productivity and competitiveness within our economy; towards a friendlier, more efficient public administration; towards new opportunities and prosperity for all citizens and, above all, for the young generation. S

Dr. Kostas Karamanlis is Prime Minister of Greece.

MRS. VIVIANE REDING

The “Digital Leap” of Europe requires investments in research and innovation

What is the evolution of the i2010 strategy from the launch of eEurope to today? How has the strategy changed over the years?

The first eEurope Action Plan - eEurope 2002 - was launched by the European Commission in June 2000 to support the Lisbon Strategy, to make the European Union the most competitive and dynamic knowledge-based economy in the world by 2010. Two years later, building on its success, the eEurope 2005 Action Plan was launched. Whereas the 2002 Action Plan targeted Internet connectivity, eEurope 2005 aimed to support economic growth and social cohesion through the take up of on-line services and e-business, based on a secure broadband infrastructure. eEurope was intended to act as a catalyst for actions within Member States and used benchmarking of targets and exchanges of good practice to motivate states to act.

Five years after the launch of the eEurope initiative, the context had changed and there was a need for a new approach. First of all, the world of Information and Communication Technologies (ICT) has become more mature and global, and the use of ICT moved from a pilot phase to wide deployment. Secondly, the market has faced new opportunities; economic conditions have improved in recent years and investment in higher capacity networks has created conditions for the faster and wider distribution of new content and services. The disappearance of traditional boundaries between different kinds of networks, services and appliances has made for bigger and deeper markets. Thirdly, ICT has become part of our daily life and public authorities look more and more to meet societal demand through user-friendly, accessible and secure on-line services. Finally, the re-launch of the Lisbon Strategy has been focused on growth and employment, and there is an EU-wide consensus that ICT plays a key role in this respect.

Political will and dedication, Political decision on

EU is preparing to involve itself in research, industrial and cultural partnerships, notably through the international co-operation section of the Information Society Technology Research Programme (IST)

We have, therefore, come up with a new and comprehensive strategy for the information society for the next five years – the "i2010" initiative. i2010, for the first time, provides a comprehensive approach that covers the entire economic sector and the whole value chain affected by digital convergence. Also, instead of a detailed action plan like eEurope, which quickly becomes obsolete, this time we opted for a broad and flexible strategy with three major objectives. It is going to be easier to up-date and fine-tune this strategy in response to new challenges.

At the conception of e-Europe, competitive forces like India and China were not as prominent as they are today. Will the strategy evolve further to cater for a European approach to the challenges /opportunities that the growing IT-literate population there can provide?

Competition with these countries has already been addressed in the i2010 initiative and indeed much earlier. Europe needs higher ICT research investment to reach the Barcelona target of 3% of GDP on R&D not least to face international competition with countries such as China or India.

At the World Summit on Information Society, I advocated the importance of a global and inclusive information society. I reject therefore a purely defensive stance in the face of competition. The growing IT-literate population in emerging economies is offering exciting new prospects for the European IT and content industry, as has already happened in the mobile sector (GSM).

Obviously these new markets cannot just be seen as a simple extension of the European market; the EU is preparing to involve itself in research, industrial and cultural partnerships, notably through the international co-operation section of the Information Society Technology Research Programme (IST). A good example of this is the way in which we are promoting the Digital Video Broadcasting (DVB) standard with key partners worldwide.

Such cooperation is possible only to a limited extent under the Sixth Framework Programme for research and this is why I have proposed to strengthen significantly the IST activities with emerging economies under the Seventh Framework Programme for 2007 - 2013.

Some say that the i2010 set rather ambitious targets – others say that not succeeding in meeting these targets will further widen the innovation gap with the other side of the Atlantic. What is your view?

My answer is an emphatic "yes" to both questions. It is true that we have set ourselves ambitious targets for the next

MRS. VIVIANE REDING

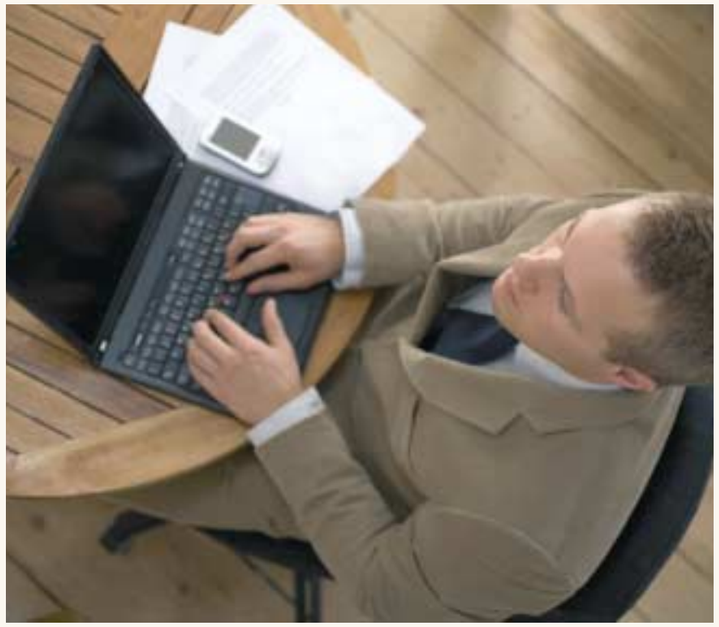
The "Digital Leap" of Europe requires Political will and dedication, Political decision on investments in research and innovation

five years. And indeed, failing to meet them will further widen the innovation gap with the other side of the Atlantic. The EU invests much less on research than the US: Europe spends 80 € per head; the US spends 350 € per head. The EU-US innovation gap has not narrowed in recent years. The latest European Innovation Scoreboard shows that the US and Japan are still far ahead of the EU25. Investment in ICT is an important component of this gap, so as I have said – and I cannot stress it enough – Europe needs higher ICT research investment.

ICT use is driving the next wave of innovation, putting technology at the service of people and businesses. Europe must and certainly is capable of reversing the trend and of remaining a key player

> At the World Summit on Information Society, I advocated the importance of a global and inclusive Information Society. I reject therefore a purely defensive stance in the face of competition

in strategic technologies. If we do not seize the initiative, others will. This is why we need to do our utmost to meet the objectives set out in i2010, to ensure that the benefits of future promising developments come to Europe and do not pass us by.



What do you consider to be the critical success factors for achieving the i2010 goals?

I believe that the growth of broadband and the convergence of networks, services and devices are paving the way for a new phase of growth and innovation. It has, therefore, become critical to seize the opportunities offered by convergence for the benefit of all citizens and of the EU economy as a whole. This is first of all a task for industry. For policy, the challenge is to ensure that a modern, flexible and open regulatory environment is in place that does not stifle, but instead encourages innovation, investment and competition. This is what i2010 aims to do.

The first critical success factor will, therefore, be the establishment of a single European information space, which is the first of the three pillars of i2010. My policy priority here is to use all instruments at my disposal to ensure a modern, market-oriented regulatory framework for the converging digital economy and to stimulate the availability of online content. This implies two major tasks, one of which is the modernisation of the EU rules on audiovisual content, for which I have already made a proposal that was adopted by the Commission

Continued on page 14

MRS. VIVIANE REDING

The "Digital Leap" of Europe requires Political will and dedication, Political decision on investments in research and innovation

Research spending in 2013 should be 75% more than in 2006. It will be my job to turn this into effective support for collaborative ICT research

in December. We now have to see the proposal through the legislative process. The other key task is the review of the regulatory framework for electronic communications. The Commission is currently conducting a broad analysis and consultation on whether or not our current regulatory framework is functioning well and whether any change is needed to enhance its contribution to innovation and investment.

The second critical success factor will be to ensure a higher and more efficient effort in R&D in the EU, which is the objective of the second pillar of i2010. We now need an agreement on the EU Financial Perspectives for 2007-13. That should open the way for a serious increase of the support for ICT research in the 7th Research Framework Programme (FP7) and for actions to promote ICT take-up and use in the Competitiveness and Innovation Programme (CIP). The European Council in December said that research spending in 2013 should be 75% more than in 2006. This is an encouraging sign. It will be my job to turn this into effective support for collaborative ICT research, in which there is a strong private sector contribution.

The third critical success factor will be to ensure that the benefits from the digital economy and services are available to all. The information society will be sustainable only if it ensures inclusion and broad e-participation. Tackling all forms of the digital divide is a key concern of the third pillar of i2010. My aim here is to promote the use of ICT to bring improvements in areas such as healthcare, education, life-long learning and government services – in other words, to improve people's quality of life via better public services and social inclusion.

How can countries that are falling behind the i2010 goals catch up with the more progressive ones?

Political will and dedication is crucial for catching up. As in other areas of economy, catching up is easier than paving the way. In that sense the less developed countries have an advantage of being able to learn both from the mistakes and from the successes of the more advanced ones.

The right policy framework and bold actions may spur the development of Information Society. For instance, implementing programmes in the area of eGovernment will produce positive spillovers in other parts of the economy and society,

Political will and dedication is crucial for catching up. As in other areas of economy, catching up is easier than paving the way

such as increased ICT use by households or the development of eBusiness.

Regional policy is one of the ways in which the EU supports the efforts of less developed countries. Information Society is one of its key priorities. To give you some practical examples, with the aid of the structural funds, companies or local authorities can upgrade their equipment, improve their infrastructure or train their workforce – all of which will contribute to catching up.

The countries which are lagging behind also have the opportunity to participate in the Community research programmes within the Framework Programme. Even with the same financial input, less developed countries can benefit more from such programmes than the more developed countries.

Another feature of i2010 involves dialogue with stakeholders and the Member States, whereby exchange of best practice can provide additional impetus for learning and catching up.

Greece has a low PC and Internet penetration in the critical groups (i.e. consumers and SMBs). What would you suggest that Greece should do in order to achieve substantial improvement in the founding parameters that constitute the i2010 strategy?

Indeed, Greece's rate of broadband penetration is the lowest in Europe. In terms of population covered by DSL (broadband), Greece is also trailing behind: while several EU Member States have 100% coverage and the average for EU15 is 88%, Greece stands at less than 10% of population with access to broadband. Furthermore, only 22% of Greek households have access to the Internet at home, while the EU average is 48%. Meanwhile, Greece has the highest prices and one of the lowest levels of competition in this field.

Slow ICT diffusion, along with low investment in R&D and education, are some of the factors which the Commission has identified as the reasons for Greece's weak economic performance. For instance, in terms of the share of ICT expenditures as a % of GDP, Greece is at rank 20 of the EU25. Yet we all know that ICT investment is vital for productivity growth. This is why I cannot stress this enough that Greece – and indeed the EU in general – must see more ICT investment and public R&D expenditure.

Greece needs to catch up for example in terms of getting the benefits of eGovernment to its people and businesses. Today, 30% of Greek government services are fully on-line against the EU15 average of 46%. Bringing public services on-line allows significant savings in terms of time and administrative costs. I would therefore urge you to take concrete actions towards an open and online government in areas such as inclusion, efficiency and cutting red-tape, moving to e-procurement and adopting electronic

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IDs. Next year, as part of i2010, we will launch an Action Plan on eGovernment to help Member States with their efforts.

The Member States' main vehicle of implementing i2010 is their National Reform Plans, which define national strategies for achieving the Lisbon goals. The Greek National Reform Plan considers the promotion of the knowledge-based society an important priority. Measures to achieve that objective are, however, quite vague. Greece has to act decisively and constructively if it wants the business opportunities and the enhanced performance that integrated web services, based on broadband, can give to both small and large enterprises.

Mrs. Viviane Reding is Member of the European Commission responsible for Information Society and Media.

MR. RUDY PROVOOST

i2010 - A strategy for Building Digital Europe

Europe has built world-leading positions in crucial industry segments such as mobile communications, broadband telecommunications networks, enterprise software and services, digital and high-definition television. It is also beginning to excel at improving essential public services such as health and education through the deployment of cost-effective digital technologies. There is, however, a recognition that both the public and private sectors need to ensure that the pace of technological progress, and the associated economic and social benefits, is not slowed by outdated or unnecessary regulatory burden.

1. Digital Convergence - an economic opportunity and a regulatory challenge for Europe

The digital technology industry - i.e. information, communications and consumer electronics technologies - has a pervasive impact on economic and social development:

- Digital technology is a rapidly growing industrial sector
- It is an enabler for economy wide productivity growth, being responsible for 40% of productivity gains in Europe (1995-2000)
- ICT investments produce 25% of economic growth in Europe
- In the US, ICT has produced 1.4% annual productivity growth
- The largest part of ICT's contribution is yet to come
- Digital convergence is at the core of the next big wave
- Wide adoption throughout the economy and public service is a key to improving productivity
- ICT can be an equaliser providing the developing world an unprecedented opportunity to participate in the digital economy

New business opportunities ('value domains') are emerging which represent an economic value of hundreds of billions of Euros in terms of annual revenues. Examples of these new value domains are the digital home where all devices can interact and communicate with each other and the digital enterprise where employees have exactly the same service anytime and anywhere that they are used to having in their office. The critical challenge for Europe is to be able to seize these economic and associated social benefits.

Europe is in a good position to take on the challenge. We believe that the European Commission's i2010 initiative provides Europe with a framework to mobilize resources and make the required reforms to meet the challenge. But the initiative at this stage is only a framework and much of its ability to contribute will depend on the practical solutions and details in the Directives adopted and the actions of the Member States. Can they really create a favorable environment for digital convergence and its swift and harmonized implementation throughout

Europe has built world-leading positions in crucial industry segments such as mobile communications, broadband telecommunications networks, enterprise software and services, digital and high-definition television

Europe? To get the context right we want to emphasize that Europe will only be able to benefit from the opportunity if it can create a better environment than that which its main competitors will deliver. This environment involves a competitive regulatory framework, a significantly improved knowledge base and a more inclusive information society.

2. Technical digital development

The development of technology will change the European economic and social landscape in many ways by 2010:

- Delivery networks will have much higher bit rates. Delivery networks - fixed telecom, cable, cellular and other wireless etc. - will in many circumstances have much higher bit rates (100Mb/s for downlink peak rates). The bandwidth will allow sufficient capacity to deliver any service, including High Definition real time video streaming.
- Access will be seamless for the consumer and service provider. There will be enough intelligence embedded in the terminals and networks so that connectivity will be provided by the most cost-effective network, taking into account the type of service and the context of its usage. For the service provider it will be enough to code the content once and the network will automatically reconfigure the service to make it compatible with all relevant delivery networks.

- Networks and devices will be interoperable. Networks and devices will be interoperable allowing the seamless transfer of service from one network or terminal to another. From the user perspective this will bring about predictable usability of content and services to consumers. Interoperability can be achieved in a number of different ways, one of which is the usage of open standardized interfaces in multiple platforms, so that multiple independent implementations for software and services can interoperate. Devices will be able to communicate through cable connection or various wireless proximity networks. Presence and identification will be enablers for consumer to access personalized content and services.
- Efficient network security, privacy and authentication technologies will be available. Given the right conditions to develop, efficient network security, privacy and authentication technologies will be readily available. They will create trust among consumers and service providers allowing safe and reliable delivery of digital services anytime and anywhere.
- Digital Rights Management systems will be taken up at a much larger scale. Digital rights management technologies will allow for right holders to have full control of the usage. The business models and charging practices will fully respect the balance between the principles of fair use and compensation for the right holder.

MR. RUDY PROVOOST

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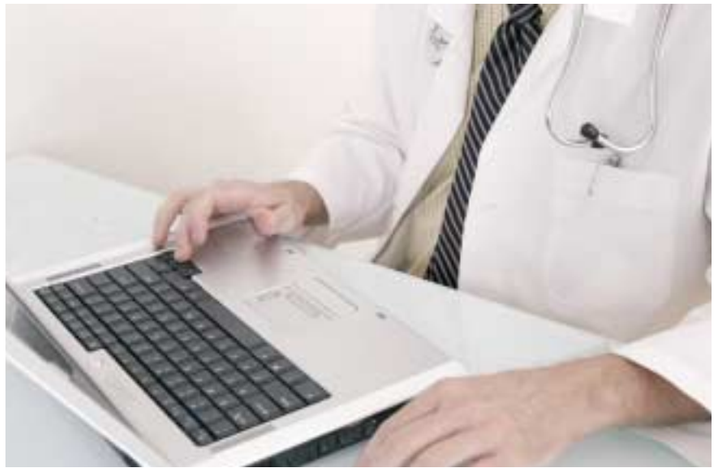

3. Innovation and Investment in Research

Europe must be able to improve its ICT knowledge base. Europe is lagging badly behind its main competitors in terms of ICT R&D and implementation. The new competition from the emerging economies such as China and India is creating additional pressures to mobilize an appropriate European response. This is a joint effort by the EU and its Member States. The main challenge is to generate sufficiently large and ambitious R&D programs that can establish a technological leadership for Europe in strategic ICT. European ICT industries together with other industries have developed a number of technology platforms (and Joint Technology Initiatives) with the objective of establishing leadership and stimulating public and private investment in ICT. They must be industry driven, with public/private partnerships both for funding and execution. The EU 7th R&D Framework Programme must play an important catalytic role to facilitate these initiatives.

The R&D effort is just one of the many challenges of modernizing the European innovation system. A modernisation of the current State Aid rules for R&D should also play an important role to stimulate innovation. The framework for state aid should be in line with the knowledge economy innovation process, which is interactive, iterative and concurrent. The State aid rules should foster a level playing field, not only within the Union, but also at the worldwide level. Furthermore, more state aid for innovation should be possible, not only for SMEs, but also for large firms. Public/private partnerships, education reforms to attract and reward best talents for the ICT sector, elimination of excessive regulatory burden and improving market access and conditions for venture capital business are necessary steps for providing an attractive environment for ICT related innovation and application in Europe[1].

> In order to benefit from the ICT development and digital convergence, Europe must deliver a regulatory framework, competitive with other regions, that facilitates convergence, improves the European knowledge base and builds conditions for an inclusive Information Society

4. Conclusions

Europe is at an important crossroads. Europe is still in good position to benefit from the global ICT development. Strong large and small ICT companies, a well-educated work force and a reasonably good knowledge base are important assets in the global competition. Yet, many countries outside Europe are rapidly developing a favorable environment for digital convergence in order to gain leadership in the global competition. Europe must react swiftly and effectively. i2010 is an excellent framework for moving forward. At this point in time it is important to create a compelling vision as well as a roadmap to implement that vision. In this context the following list of principles should govern the more detailed preparatory work:

- Regulation should be light and market oriented and should enhance innovation and investment and allow for new applications to emerge.
- Regulation should gradually be reformed and diminished to allow for the horizontal structure of the future communications market and thus create a level playing field and competitive market conditions for all actors in content creation, service provision, delivery and consumption.
- For consumers, regulation should encourage open access to all services any time and any place, and for service providers fair and non-discriminatory access to delivery networks and customers.
- European communications markets must be better harmonized in order to make Europe a lead market for new digital products and services
- Regulatory barriers to new types of pan-European public and private digital services must be eliminated.
- Future communications markets will be global. Regulation must respect this global nature and create a level-playing field for both domestic and foreign players.

> Europe is still in good position to benefit from the global ICT development. Strong large and small ICT companies, a well-educated work force and a reasonably good knowledge base are important assets in the global competition

In order to benefit from the ICT development and digital convergence, Europe must deliver a regulatory framework, competitive with other regions, that facilitates convergence, improves the European knowledge base and builds conditions for an inclusive information society.

EICTA, founded in 1999 is the voice of the European digital technology industry, which includes large and small companies in the Information and Communications Technology and Consumer Electronics Industry sectors. As the president of EICTA, Rudy Provoost, believes in building a strong Digital Europe and fully supports the vision developed by the members of the association.

[1] *EICTA's position on the state aid rules for R&D is fully in agreement with 'Creating an Innovative Europe', the report by an independent group of experts chaired by Mr Esko Aho, former Prime Minister of Finland and President of the Finnish national fund for R&D (Sitra). The report was published on 20 January 2006 at the behest of the Commission.*

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