Digital Agenda for Spain

Contents

1 Digital Agenda for Spain

It reflects the Government of Spain's strategy for developing the digital economy and society in Spain.

Targets:

o   To bring the benefits offered by new technologies to the **people, business and public administration services by:**

- ▪ **Developing** the **digital economy**
- ▪ **Lowering running costs** within the **public administration services** and **improving public services**
- ▪ **Strengthening the Spanish ICT sector** as a source of wealth and job creation
- ▪ **Promoting R&D+i** in the industries of the future

o   Adopting **all the targets of the Digital Agenda for Europe** for 2015 and supporting those of the agenda for 2020

o   Incorporating **specific targets** of great importance for Spain (ICT in SME, security, digital content, internationalisation)
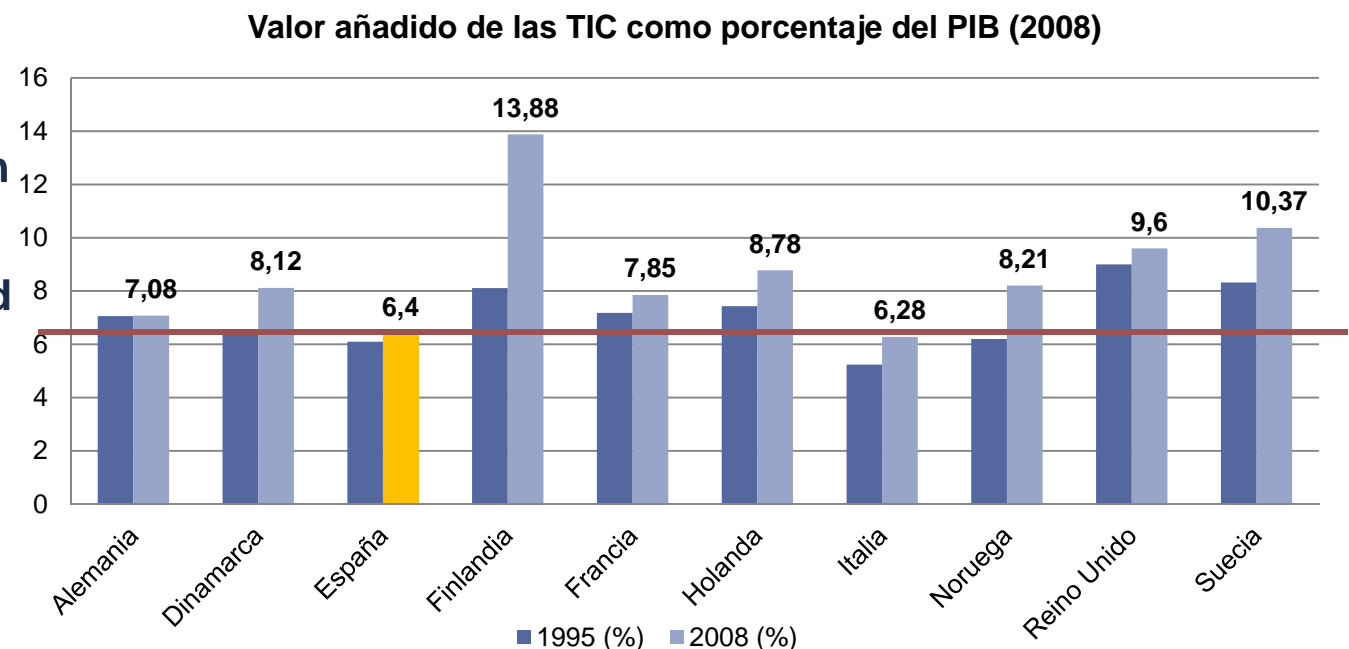
Agenda Digital
para España

Key data on the economic impact of ICT used by the European Commission

A. Contribution to economic growth

- The ICT sector accounts for 5% of European GDP
- A 10% increase in broadband generates a GDP increase of between 0.9% and 1.5%
- Implementation of the Digital Agenda for Europe (DAE) will enable a 5% GDP increase over the next eight years

According to this graph, Spain needs to increase its contribution to GDP in ICT and digital content because we have room for improvement when compared with our European colleagues

Valor añadido de las TIC como porcentaje del PIB (2008)

	Alemania	Dinamarca	España	Finlandia	Francia	Holanda	Italia	Noruega	Reino Unido	Suecia
2008 (%)	7,08	8,12	6,4	13,88	7,85	8,78	6,28	8,21	9,6	10,37

■ 1995 (%) ■ 2008 (%)

4

Key data on the economic impact of ICT used by the European Commission

B. Impact on job creation

- For every **million euros invested in ICT**, up to **33 jobs** are created
- **Implementation of the Digital Agenda for Europe** will enable the creation of **1.2 million jobs** in the short term and **up to 3.8 million in the long term**.

C. Impact on productivity

- The ICT sector accounts for **50% of productivity growth** (20% direct and 30% through investments in ICT)

D. Consumer welfare

- If growth can be achieved in e-commerce of up to 15% of total retail trade and barriers can be eliminated, consumer welfare would increase by 1.7% of EU GDP.

Key data on the ICT sector in Spain in 2011

In Spain, the ICT and digital content industry represents:
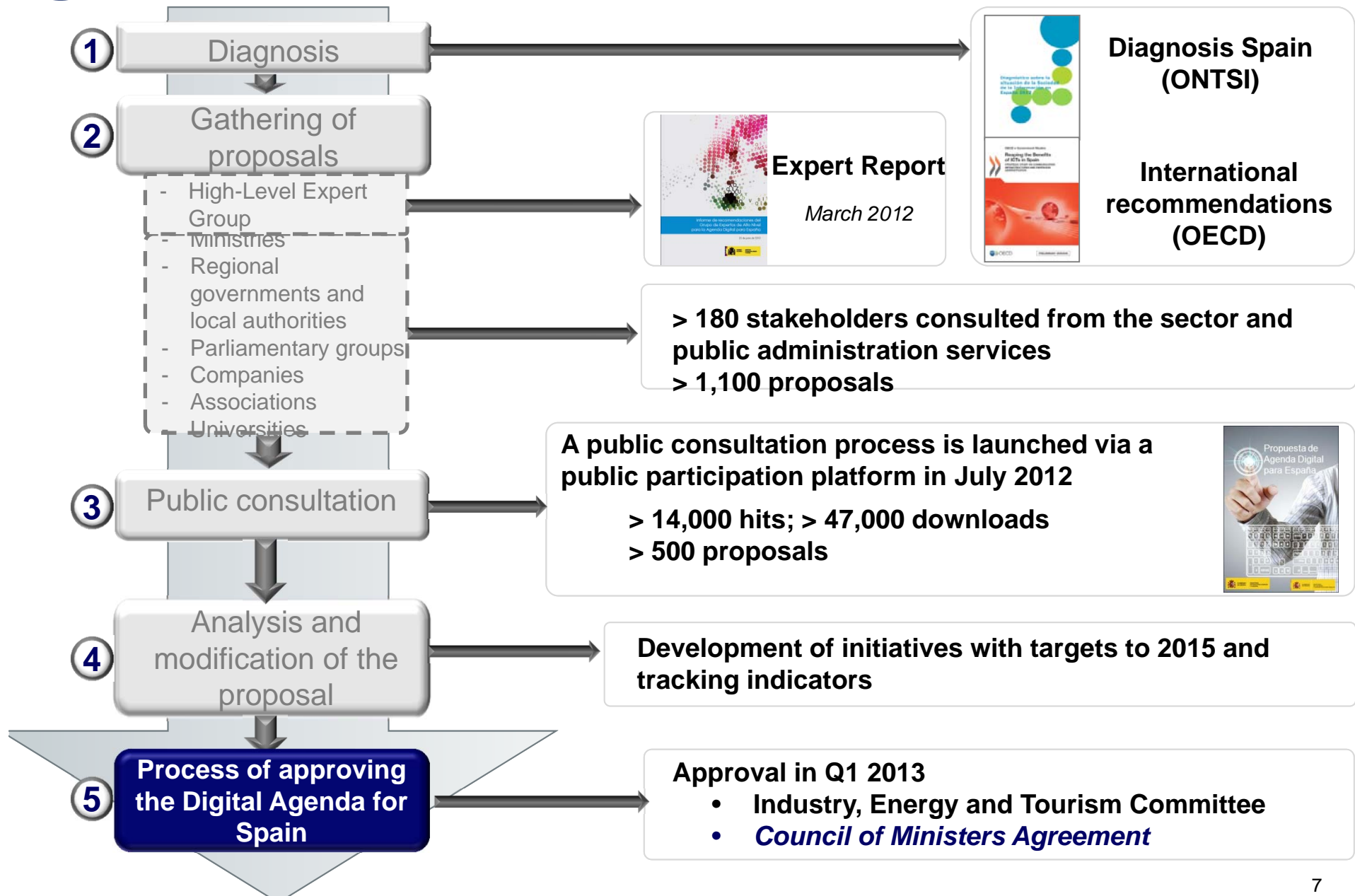
- Almost 30,000 companies with a turnover of 80 billion euros
- 445,000 jobs
- 5.7% of GDP

	TIC Y CONTENIDOS		TIC		CONTENIDOS
Nº EMPRESAS	29.979	=	20.709	+	9.270
FACTURACIÓN (Mill €)	100.828	=	84.619	+	16.209
EMPLEO	444.680	=	355.376	+	89.304
INVERSIÓN (Mill €)	17.877	=	14.327	+	3.550
VAB pm (Mill €)	60.172		VABpm /(PIB)		5,7%

Source:
2011 Report on the Telecommunications, Information Technology and Content Sector in Spain
Spanish National Telecommunications and Information Society Watchdog (Spanish acronym: ONTSI)
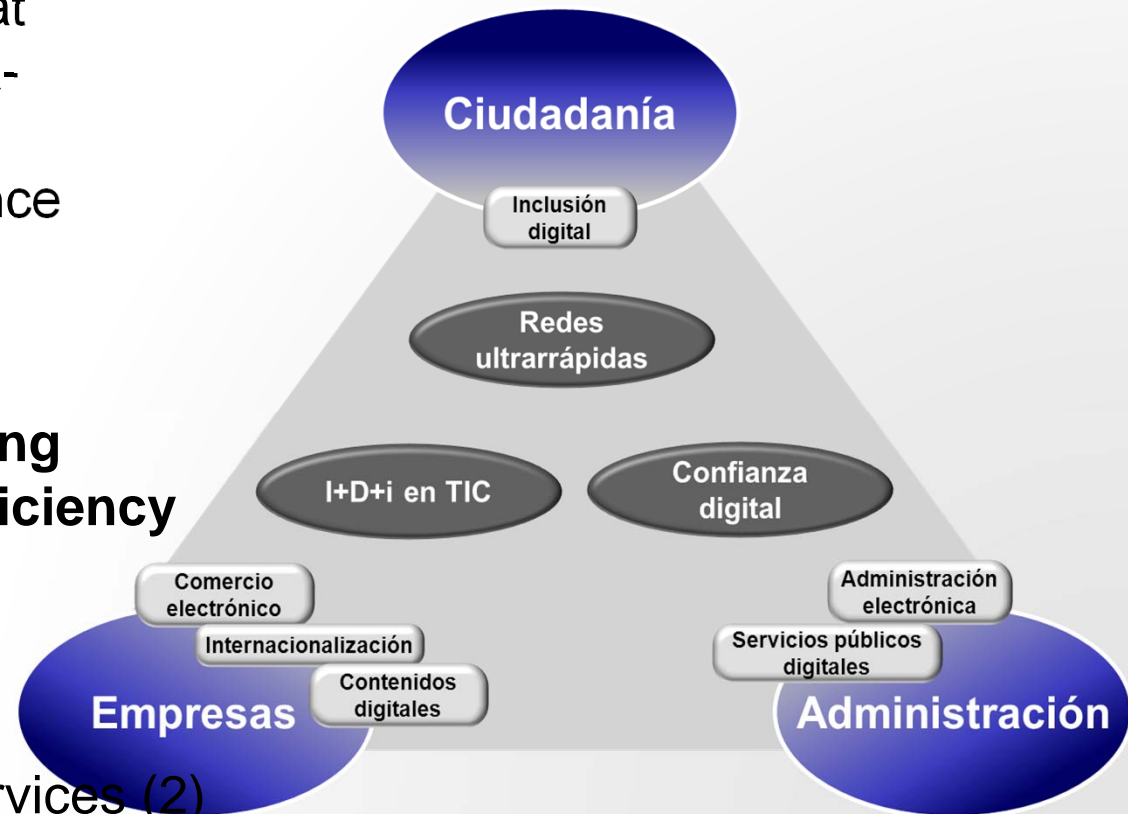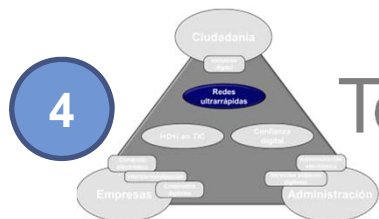
3 **Open and transparent drafting process**

1 Diagnosis → **Diagnosis Spain (ONTSI)**

2 Gathering of proposals

- High-Level Expert Group
- Ministries
- Regional governments and local authorities
- Parliamentary groups
- Companies
- Associations
- Universities

→ **Expert Report**

March 2012

International recommendations (OECD)

> 180 stakeholders consulted from the sector and public administration services
> 1,100 proposals

3 Public consultation → **A public consultation process is launched via a public participation platform in July 2012**

> **14,000 hits; > 47,000 downloads**
> **500 proposals**

4 Analysis and modification of the proposal → **Development of initiatives with targets to 2015 and tracking indicators**

5 **Process of approving the Digital Agenda for Spain** → **Approval in Q1 2013**
- **Industry, Energy and Tourism Committee**
- *Council of Ministers Agreement*

We propose nine specific initiatives that will be implemented in the first half of 2013, each with targets, indicators and action priorities...

o 3 **cross-cutting plans** that enhance the **supply (**ultra-fast networks) and the **demand of ICT** (confidence in the digital arena and R&D+i)

o 6 plans aimed at **increasing competitiveness and efficiency through the use of ICT:**

▪ The public (1)

▪ Companies (3)

▪ Public administration services (2)

Ciudadanía

Inclusión digital

Redes ultrarrápidas

I+D+i en TIC

Confianza digital

Comercio electrónico

Internacionalización

Contenidos digitales

Empresas

Administración electrónica

Servicios públicos digitales

Administración

To promote efficient investment in ultra-fast networks and to establish the groundwork to enable European broadband targets for 2020 to be achieved
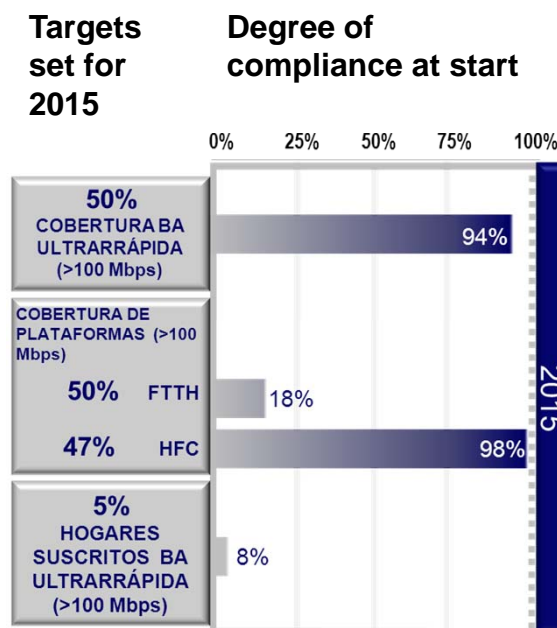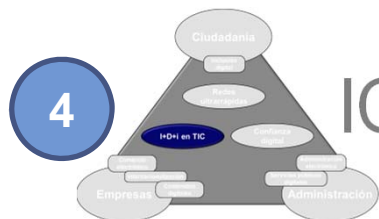
Key targets

o To facilitate the **deployment of ultra-fast networks** by the operators

o Rapid deployment of LTE

o **Broadband targets for 2020**
  - 100% population coverage at 30 Mbps
  - 50% of homes connected at 100 Mbps

o **To foster competition between platforms**

Steps

o New **General Telecommunications Act**

o National **Ultra-fast Networks** Strategy
  - To share infrastructure
  - Coordination between operators and public administration services

o More **efficient** use **of the** radioelectric **spectrum**
  - Deregulation of the digital dividend
  - Usage flexibility: secondary market; shared use; etc.

Compliance indicators

Targets set for 2015

Degree of compliance at start

0% 25% 50% 75% 100%

50% COBERTURA BA ULTRARRÁPIDA (>100 Mbps) — 94%

COBERTURA DE PLATAFORMAS (>100 Mbps)
50% FTTH — 18%
47% HFC — 98%

5% HOGARES SUSCRITOS BA ULTRARRÁPIDA (>100 Mbps) — 8%

2015

BA: BROADBAND
FTTH: FIBRE-TO-THE-HOME NETWORKS
HFC: HYBRID FIBRE COAXIAL NETWORKS (CABLE NETWORKS)

4

To benefit from the growth potential and job creation potential in the industries of the future

Key targets

- Increase **participation by Spanish companies** in the most relevant initiatives in the digital arena:
    - Smart Cities,
    - Cloud Computing,
    - Big Data.
    - Specialisation clusters aimed at supplying the European market with quality services
- To position Spain at the **cutting edge of innovation**
- To position Spain as an **attractive destination for investment** in industries of the future

Steps

- **R&D+i** focused on the industries of the future
- **Adaptation of the training supply** to cover the demand for new professionals in strategic sectors
- Participation in **seed capital and risk capital** projects to support entrepreneurship
- Establishment of **working groups with the private sector** to undertake key projects
    - Standardisation of smart cities
    - Cloud computing and big data services

Industries of the future

CLOUD COMPUTING

Impact in Europe to 2020:
- *GDP growth **957 billion euros***
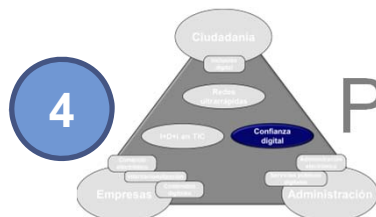- *Creation **of 3.8 million jobs***

SMART CITIES

Impact on energy efficiency:
- *70% energy consumption in cities*
- *Traffic jams account for 1% of European GDP*

BIG DATA

*Global impact in 2015 **4.4 million ICT jobs***

European Commission. Unleashing the Potential of Cloud Computing in Europe. COM(2012) 525 final.
European Commission. Smart Cities and Communities-European Innovation Partnership. COM(2012) 4701 final
Gartner. Gartner Says Big Data Creates Big Jobs: 4.4 Million IT Jobs Globally to Support Big Data By 2015. Press release October 22, 2012

To establish a climate of trust in the digital arena so that ICT can contribute to the economic and social development of the country
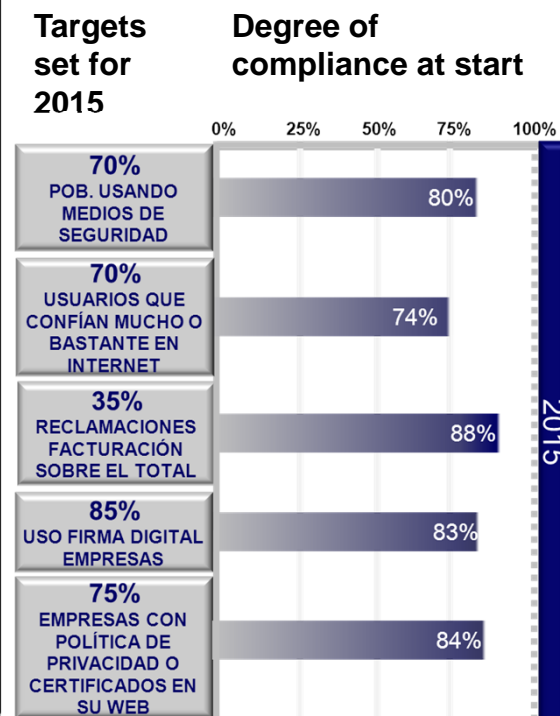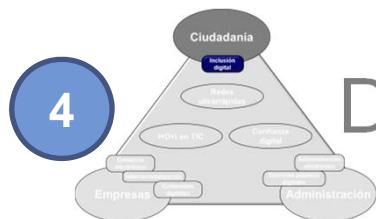
Key targets

o To increase the use of digital services **by individuals and SME**

o To improve the conditions of **security, protection and confidence** among users

o To promote a culture of **responsible use** of cyberspace among **users** and **companies**

o To foster the development of a **reliable industry**

o To complement other government **cyber-security** strategies

Steps

o To amend **regulations and stimulate a** reliable **market**

o To establish **awareness and education programmes** among users

o **To strengthen INTECO** as a national benchmark in digital confidence

o To improve the conditions of **e-transactions** for consumers and retailers

o To foster best practices

Compliance indicators

Targets set for 2015

Degree of compliance at start

Targets set for 2015	Degree of compliance at start
70% POB. USANDO MEDIOS DE SEGURIDAD	80%
70% USUARIOS QUE CONFÍAN MUCHO O BASTANTE EN INTERNET	74%
35% RECLAMACIONES FACTURACIÓN SOBRE EL TOTAL	88%
85% USO FIRMA DIGITAL EMPRESAS	83%
75% EMPRESAS CON POLÍTICA DE PRIVACIDAD O CERTIFICADOS EN SU WEB	84%

0%   25%   50%   75%   100%

2015

POP: population aged between 16 and 74
COMPANIES: Companies with more than 10 employees

Digital inclusion plan

To achieve Internet usage by most of the population and to meet the European digital inclusion targets and minimise the digital gap
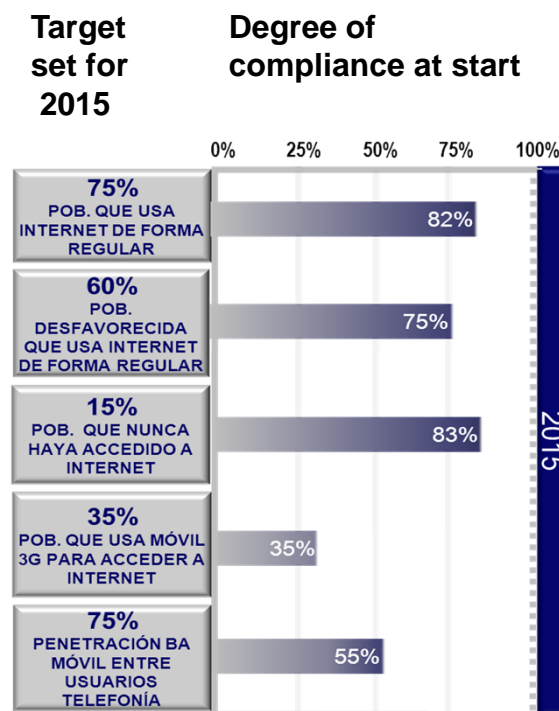
Key targets

- To increase the size of the **population accessing** the Internet
- To increase the number of people **over** 65, on **low incomes**, the **unemployed** and with **fewer qualifications**
- To increase the number of **accessible professionals**

Steps

- To provide the population with sufficient **ICT skills** to access and benefit from the Internet
- To improve **accessibility to** digital **public services**
- **To mobilise** public and private **resources**
- To benefit from the potential of **mobile broadband, smartphones and tablets**

Compliance indicators

| Target set for 2015	Degree of compliance at start
75% POB. QUE USA INTERNET DE FORMA REGULAR	82%
60% POB. DESFAVORECIDA QUE USA INTERNET DE FORMA REGULAR	75%
15% POB. QUE NUNCA HAYA ACCEDIDO A INTERNET	83%
35% POB. QUE USA MÓVIL 3G PARA ACCEDER A INTERNET	35%
75% PENETRACIÓN BA MÓVIL ENTRE USUARIOS TELEFONÍA	55%

0%   25%   50%   75%   100%

2015

BA: BROADBAND
REGULAR USE: access once a week in the last three months

POP: population aged between 16 and 74
DISADVANTAGED POP: population that meets one of the following conditions: (i) aged between 55 and 74; (ii) low level of education ISCED 0-2; (iii) not part of the labour market (unemployed, inactive or retired)
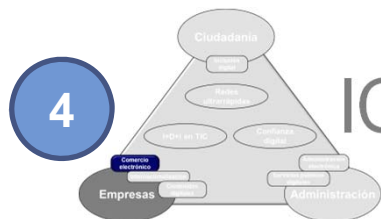
ICT in SME and e-commerce plan

To use ICT to improve productivity and competitiveness in SME and to meet the European e-commerce targets
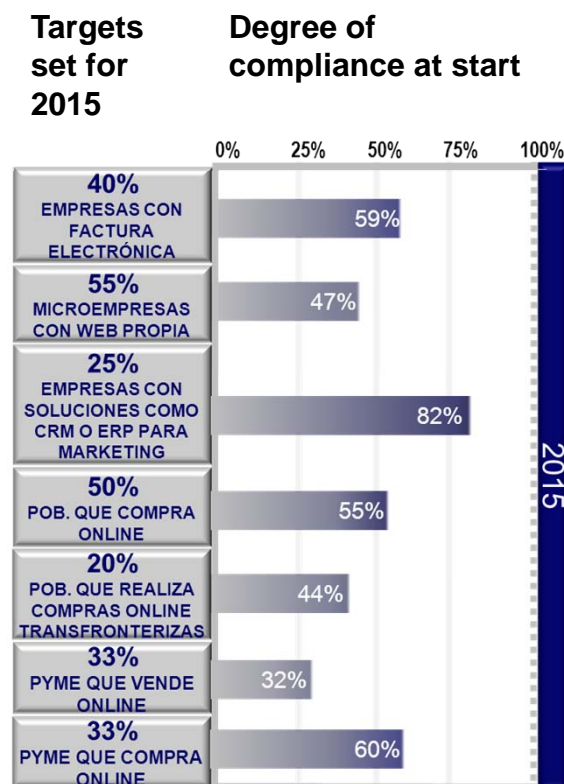
Key targets

- To increase **the efficient and intensive use of ICT in SME**
- To implement **e-billing** in companies
- To increase the number of people and SME that engage in **e-commerce**

Steps

- To establish **showcase centres** using ICT for specific sectors, such as tourism
- To increase the training offer in **e-commerce** and **digital marketing** in order to cater for demand
- To design rules to ensure **e-billing interoperability**
- To establish a **central service for receiving e-bills**
- **To support and advise retailers** for them to sell online

Compliance indicators

Targets set for 2015	Degree of compliance at start
40% EMPRESAS CON FACTURA ELECTRÓNICA	59%
55% MICROEMPRESAS CON WEB PROPIA	47%
25% EMPRESAS CON SOLUCIONES COMO CRM O ERP PARA MARKETING	82%
50% POB. QUE COMPRA ONLINE	55%
20% POB. QUE REALIZA COMPRAS ONLINE TRANSFRONTERIZAS	44%
33% PYME QUE VENDE ONLINE	32%
33% PYME QUE COMPRA ONLINE	60%

2015

POP: population aged between 16 and 74
COMPANIES: Companies with more than 10 employees
MICROCOMPANIES: Companies with less than 10 employees

ONLINE SALE/PURCHASE: acquiring goods or services via the Internet in the last 12 months. In the case of companies, only those where online orders exceed 1% of the total
CRM: software for customer relations management
ERP: enterprise resources planning systems
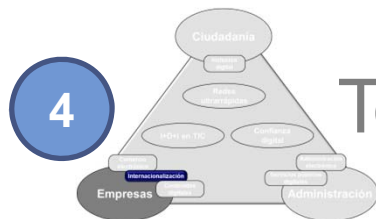
To increase the visibility and international presence of Spanish technology-based companies
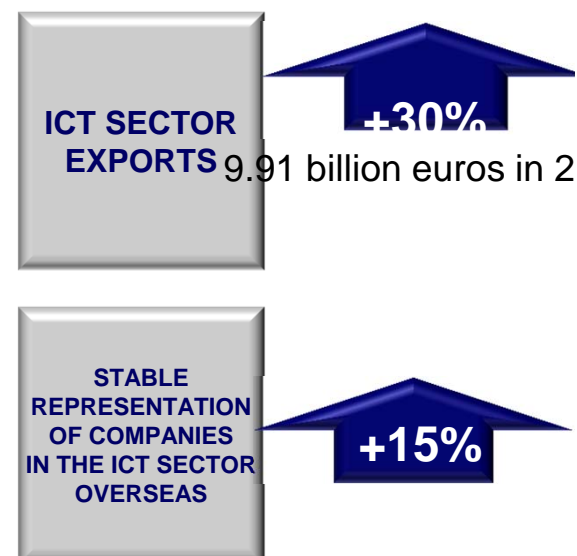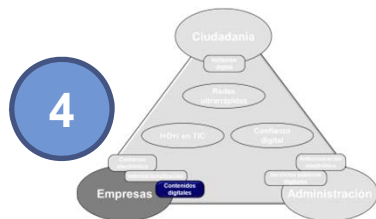
Key targets

o To increase the ability of SME to **compete internationally**
- Larger
- More specialised
- Greater presence and local knowledge

o To increase and consolidate the **stable presence** of Spanish ICT companies overseas

o To achieve sustained growth in **ICT exports**

Steps

o Development of **competitive offer**
- Risk capital and innovative public procurement
- Synergy between R&D+i and internationalisation

o **Internationalisation support** initiative

o **Business accompaniment**
- ICEX, commercial offices
- International tender office

2011-2015 growth targets

ICT SECTOR EXPORTS 9.91 billion euros in 2

+30%

STABLE REPRESENTATION OF COMPANIES IN THE ICT SECTOR OVERSEAS

+15%

To benefit from the growth potential of the digital content industry for the digital economy
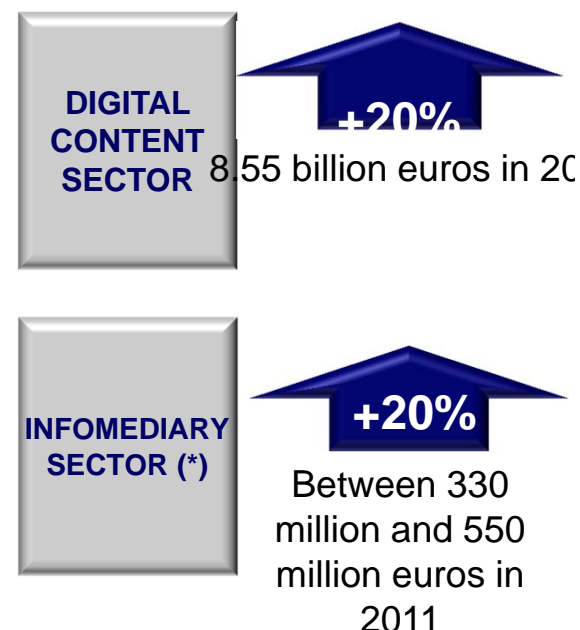
Key targets

o To define a **comprehensive strategy** to promote the digital content industry
- R&D+i
- Training
- Industrial policy

o To aim actions at **traditional sectors** and **new environments**

o To consolidate digital content companies and obtain **greater maturity in the industry**

o To achieve **growth** in the content sector and the infomediary sector

Steps

o Increase the number of centres with **comprehensive training** on digital content

o Create **sectoral forums** for developing the industry

o **Export and internationalisation** programme

o **Re-use of information** from the public sector in such strategic sectors as tourism

2011-2015 growth targets

DIGITAL CONTENT SECTOR

+20%

8.55 billion euros in 20[...]

INFOMEDIARY SECTOR (*)

+20%

Between 330 million and 550 million euros in 2011

(*) those companies that produce applications, products and/or services of added value for third parties using information from the public sector

15
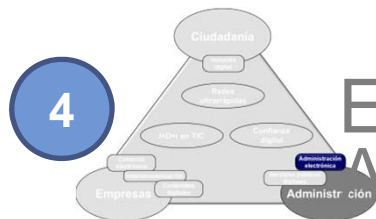
E-Government Action Plan of the General State Administration Services

To increase public administration service efficiency through ICT and to meet the European targets on the use of e-Government services
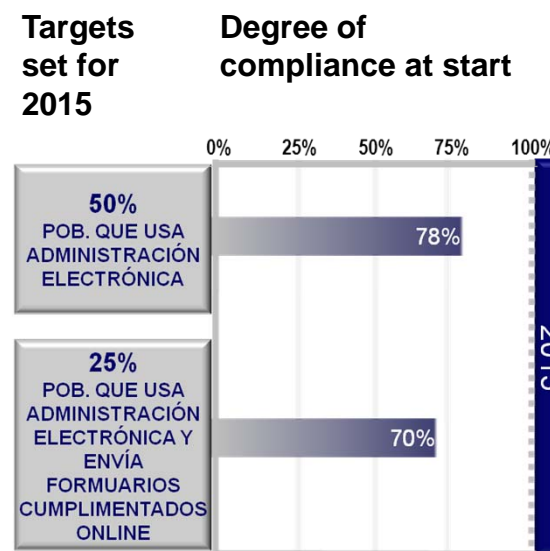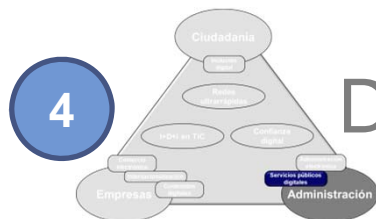
Key targets

o To bring the public administration services closer to the **people and companies**

o To increase the **use of e-Government services**

o **To streamline and optimise** the use of ICT in public administration services

o **To increase collaboration** between the various public administration services

o **To bridge the digital gap** that geographically separates the centre from the periphery

Steps

o **To streamline structures** within the General State Administration Services

o To define **processes**

o **To redesign administrative procedures**

o To foster agreements that favour the **re-use of resources and services** between different administration services

Compliance indicators

Targets set for 2015

Degree of compliance at start

| | 0% | 25% | 50% | 75% | 100% |

50% POB. QUE USA ADMINISTRACIÓN ELECTRÓNICA — 78%

25% POB. QUE USA ADMINISTRACIÓN ELECTRÓNICA Y ENVÍA FORMUARIOS CUMPLIMENTADOS ONLINE — 70%

2015

POP: population aged between 16 and 74
E-GOVERNMENT USAGE: use of services in the last 12 months to: (i) obtain information; (ii) obtain forms; (iii) submit completed forms

To continue promoting the digitalisation of public services in order to achieve greater efficiency and structure

Key targets

- To extend **digital public services** to everyone
- **To improve efficiency** in the provision of public services
- For the General State Administration Services to promote the **ICT industry and the digital economy**

Steps

- **Digital Administration of Justice**
  - To develop and implement the procedural management system in 2014
  - To implement the electronic judicial records system in 2015
- **Healthcare and social welfare**
  - To extend the interoperable electronic prescription in 2015
  - Clinical records accessible via the Internet in 2014
- **Digital education**
  - To provide education centres with ultra-fast broadband in 2015

2011-2015 targets

PROCEDURAL MANAGEMENT SYSTEM	90% Public administration service
ELECTRONIC JUDICIAL RECORDS SYSTEM	10 MJU bodies
INTEROPERABLE ELECTRONIC PRESCRIPTION	100% Regional governments
ULTRA-FAST BROADBAND AT EDUCATION CENTRES	50% Education centres