

THE NETHERLANDS

i2010 Annual Report 2007



The Netherlands is one of the best performing countries in Europe and leads the way in information society development. The only exceptions occur in levels of eGovernment supply and 3G take-up.

The Netherlands Today

Broadband take-up is the highest in the EU and the conversion from narrowband has been rapid. Further growth will need to come from increased overall internet use. Digital Subscriber Line (DSL) is the most popular broadband technology but still almost half the market is connected through other means like cable TV. Citizen use of online services is very high and in general among the highest in the EU. High broadband penetration and widespread consumption of audiovisual online content support a sizable market for online content and relatively high use of commercial download services. 3G is still in infancy.

The Netherlands is close to the EU average in overall eGovernment services, but is still only a mid-level performer. However, citizen use is very high and the highest in Europe for some advanced services. For enterprises, advanced use is very high, while overall use is average. ICT use in schools is very high, both for use, connectivity and availability.

The level of ICT skills in the workforce is high in all aspects and the fourth highest in the EU for specialist skills. The proportion of R&D investments going to ICT-related research is the third highest in the EU. The proportion of enterprises with a broadband connection is above the EU average, although a bit behind the leading countries. Use of advanced business integration is among the top European levels, while commercial activities have improved somewhat since the last years, without reaching the top level.

Dutch ICT Policy

ICT programmes in The Netherlands are being consistently implemented.

Fostering ICT use: Among the several programmes to increase ICT use, two important ones are underway: Connecting the Dots (closer integration of local initiatives) and the new ICTRegie (strengthening and focusing ICT research). A new Social Sectors & ICT Action Programme, which was enacted in 2005 aims to employ ICT to improve mobility in urban areas, to increase the attractiveness and quality of education, and to improve public safety. Increased ICT use by SMEs is targeted by other ongoing initiatives: Netherlands goes Digital, Netherlands Digital: Groundbreaking with ICT and Widescreen Television throughout The Netherlands.

eGovernment: At the beginning of 2006 approximately 55% of government services were available online (up from 50% in 2005). The goal to raise this number to 65% has been upheld. The roll-out of the authentication facility DigiD made it easier for citizens to exploit the benefits of these services.

Spectrum Policy: In late 2005 the Radio Spectrum Policy Memorandum was approved by the government.

ICT security: Actions were undertaken to combat spam (an opt-out regime for businesses) and to raise digital security awareness (a declaration of the business community).

Broadband	2003	2004	2005	2006	EU25	Rank
Total DSL coverage (as % of total population)	94.0	99.0	99.0		87.4	5
DSL coverage in rural areas (as % of total population)			99.0		65.9	4
Broadband penetration (as % of population)	10.7	16.4	23.8	29.8	15.7	1
DSL penetration (as % of population)	5.2	10.3	14.4	18.3	12.8	2
Predominant download speed			1-2Mbps			
Households having broadband (as % of those having access to the internet at home)	33.0		68.8	82.4	62.1	4
% of enterprises with broadband access	36.6	53.7	71.3	81.7	74.5	9
Number of 3G subscribers per 100 inhabitants			1.4		5.0	14
Digital Television in households			11.4		30.6	14
Music: number of single downloads per 100 inhabitants			26.7			5
Internet Usage						
% population who are regular internet users			73.5	76.4	46.7	5
Take up of internet services (as % of population)						
Sending emails	52.5		73.1	75.9	43.8	2
Looking for information about goods and services	28.6		70.0	73.0	42.9	4
Internet telephoning or videoconferencing			5.0	10.1	7.1	10
Playing/downloading games and music	15.7		36.8	41.6	18.2	1
Listening to the web radio/watching web tv			19.8	27.9	11.8	4
Reading online newspapers/magazines	24.6		29.4	36.4	19.0	7
Internet banking			49.6	58.7	22.0	4
Places of access						
% at home	55.9		73.7	76.7	42.6	4
% at work	30.5		36.3	38.9	23.0	4
% at educational place	6.9		8.4	9.2	8.0	13
% at PIAP	11.9		3.0	2.8	6.8	26
eGovernment Indicators						
% basic public services for citizens fully available online	18.2	18.2		36.4	36.8	13
% basic public services for enterprises fully available online	37.5	50.0		75.0	67.8	10
% of population using e-Government services			45.6	51.8	23.8	3
of which for returning filled in forms			20.4	29.7	8.1	1
% of enterprises using e-Government services	41.0	46.7	56.9	69.7	63.7	15
of which for returning filled in forms	23.1	27.1	43.6	61.0	44.8	5
ICT in schools						
Number of computers connected per 100 pupils				20.0	9.9	3
% of schools with broadband access				92.0	67.0	4
% of teachers having used the computer in class during the last 12 months				90.0	74.3	4
e-Commerce						
E-commerce as % of total turnover of enterprises					11.7	
% enterprises receiving internet orders	16.6	18.6	21.4	27.9	13.9	3
% enterprises purchasing on the internet		28.7	35.3	45.3	37.9	10
e-business. % enterprises:						
with integrated internal business processes	60.0	58.9	60.9	61.7	37.3	2
with integrated external business processes	17.2	20.5	18.3	18.0	13.5	2
Security: % enterprises using Secure servers	53.4	59.9	34.5	43.1	41.0	10
% using digital signatures for authentication	10.2	12.8	13.0	15.4	14.3	6
Employment and Skills						
% employees using computers connected to the Internet	35.1	36.8	42.2	44.8	36.1	6
% of persons employed with ICT user skills.	22.5	20.5	19.6	19.7	18.5	6
% of persons employed with ICT specialist skills	4.5	4.2	4.3	4.1	3.1	4
Indicators on growth of ICT sector and R&D						
ICT sector share of total GDP	5.6				5.5	9
ICT sector share of total employment	4.0				4.0	11
ICT sector growth (constant prices).	1.9				3.6	14
R&D expenditure in ICT by the business sector, as % of GDP	0.4				0.3	6
=== as % of total R&D expenditure	35.3				25.7	3