Integrated cross-national report

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Working paper

Internet – a new potential for European political communication?

Integrated cross-national report

European Union, Switzerland, Germany, Spain, France, Italy, Netherlands, United Kingdom

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Introduction

This report presents the first work step in the framework of the empirical analysis of the potential that the Internet offers for European political communication. This study will focus on seven countries (Switzerland, Germany, Spain, France, Italy, Netherlands, and the United Kingdom) and the European level and is embedded in the Europub.com Project funded by the 5th Framework Programme of the European Commission.[1]

To conceptualise a research that aims to explore the use of the Internet by collective actors as a new form of media for carrying exchanges of political communication that may contribute to Europeanisation, the first step must be to develop a deeper understanding of the Internet in different basic aspects: market, regulation, politics and usage in general. In a second step, already existing studies on the usage of the Internet by political actors need to be evaluated with respect to findings and methods.
Therefore, this report represents a summary of the existing state of knowledge on the basis of secondary sources. The report is compiled on the basis of country reports from the seven above-mentioned countries participating in the Europub.com Project.[2] Information on the EU level is completely integrated in this cross-national report.

The primary function of the report is to serve as a reference manual in which our research group as well as outsiders can quickly get an overview of existing knowledge on specific topics, on differences between countries in that regard, as well as references to the existing literature. The topics are discussed on the national level in the seven countries, on the European level and - where the available information allows this -in a comparative way.

The report is structured in three main parts:

1) Government policies on and structural features of the Internet
2) Internet usage
3) Internet strategies of political actors

The first chapter describes the structural features of the Internet communication network and services, and presents the government policies that have shaped this market. This will include both public policies aiming at stimulating competition and innovation, and policies addressing problematic developments such as unequal knowledge of, and access to Internet technologies, and regulation of content. The market description will be led by the questions of how concentrated or decentralised the providers are, and how their ownership is structured across sectors and across borders.

The second chapter is devoted to the actual Internet usage in the seven countries of our study. Apart from secondary information on access and usage, the influence of demographic factors will be discussed, as well as the kind of activities people use the Internet for, especially concerning different forms of political communication. Moreover, reasons for not using the Internet and barriers will be taken into account.

The third chapter focuses on the Internet strategies of political actors. Here, available information on usage of site types relevant to our studies will be represented. Further, we will

[1] "The Transformation of Political Mobilisation and Communication in European Public Spheres" (Europub.com) / contract no.: HPSE-CT2000-00046 / The website of the project is available at: http://europub.wz-berlin.de/.

[2] The country reports can be obtained upon request at the Europub website: http://europub.wz-berlin.de/.

give an overview on empirical research that has been conducted in regard to strategies political actors use on their websites.

The formal structure of the whole report is designed to give at first a short summary of the points of interests, the main findings and a short comparison between the seven countries in each section. After that, the situation in each of the seven countries will be discussed separately on a more detailed level. That applies for all parts except for chapter three "Internet strategies of political actors". Here, the available empirical information is in general very thin and differs highly from country to country. Therefore this section is not structured along the countries, but along different political actors.

1 Government policies on and structural features of the Internet

New information and communication technologies (ICT) and in particular the Internet have developed and transformed at an unequalled pace over the past twenty years, and the process is still ongoing. Studies trying to evaluate the structural features and potential impacts of this development are therefore often outdated after very few years. A stock-taking exercise that compares several countries, as is the purpose of this report, is even more difficult.

As the current features of the Internet market in the European Union have been highly determined by both technological progress and state intervention (namely deregulation of the telecommunications market and promotion of ICT), these two aspects are presented jointly in a first section. This first section on governmental Internet policies also includes an overview of the decision making structures and national authorities that are competent in this sector, as well as competition rules that may have an impact on the concentration or decentralisation of the Internet market..

The second section gives an overview of the Internet market in the European Union and in the seven countries of the project as of 2000, and states the most important trends.

A third section of this chapter looks at the Internet as an arena for political participation - particularly at the regulation of this arena (e-safety and content regulation) and the supply side from the side of the government.

This third section leads to the next chapter which focuses on the actual use that is made of the Internet as an arena for political communication.

1.1 Governmental Internet policies

Section 1 of this chapter provides a summary of governmental policies on Internet in the EU and in the seven selected countries. The focus is on general Information Society policies, while the use of the Internet by the Government and administration as political actors will not be treated here. Such questions as e-voting and e-government are dealt with at the end of this chapter, and in chapter 2 on usage.
A general overview on the European policy in this field and a summary of the governmental policies in the seven selected countries is followed by separate descriptions of the seven country cases.

1.1.1 European-wide liberalisation of the telecommunications market

An initial impetus for government policies in the Member States came from the European Commission policy in this field. In 1993, the European Community and the Member States committed themselves to liberalise the telecommunications services sector in Europe on 1 January 1998. This was a decision on liberalisation anticipating the agreement on the opening up of markets worldwide under the General Agreement on Trade in Services (GATS). The necessary legislative measures of the Community consisted essentially of a number of directives intended to create a single market for telecommunications services in Europe.[3]
The background for this policy was the Commission' White Paper on "Growth, Competitiveness and Employment" of 1993. It emphasised the importance of the information society as a key to future economic growth, competitiveness, job creation and improves quality of life for all Europeans.
The beginning of a coherent and comprehensive EU policy in the field of the information society was in 1994, when the Commission published the so-called Bangemann Report entitled "Europe and the Global Information Society - Recommendations to the European Council", and the action plan "Europe's Way to the Information Society". The main objectives were to speed up the full liberalisation of telecommunication services and infrastructures, to strengthen and reorient ICT research programmes and to incorporate the new information society dimension into all relevant Community policies, and also addressed the social and cultural dimensions of the new ICT.
The Bangemann report was followed by a 1996 European Commission Communication entitled "Europe at the Forefront of the Global Information Society" that included a list of actions deemed necessary to make the information society a reality in Europe.

The EU policy on liberalisation of the telecommunications market has initiated a process of increasing convergence in the structure of the Internet communications networks and services in the EU Member States. Swiss policies in this field closely followed the EU model and other international standards (such as Council of Europe guidelines). The EU directive on liberalisation was implemented on 1 January 1997 in most countries, and opened the markets

3 "The aim of Community telecommunications policy is to remove barriers to the proper functioning of the single market in equipment, services and telecommunications networks, to open up foreign markets to Community companies and to make modern, accessible services available to EU nationals and companies. These aims are to be achieved by harmonising standards and requirements for the provision of services, opening up the terminals, services and networks markets and adopting the necessary regulations." (European Commission database Scad-plus, at http://europa.eu.int/scadplus/leg/en/lvb/e21103.htm)

in each Member State on January 1, 1998. In Switzerland, the new law came into force on January 1, 1998[4] and opened the Swiss telecommunications market by the time of liberalisation in the EU. The national rules and authorities are summarised in the section "decision making structures" below.

Since then, European policy has been seeking to provide competitive market conditions for the newly emerging technologies. The latest example of this policy is the Regulation on local loop unbundling, with which competition in local broadband access should be encouraged and high-speed Internet access brought to a wider public. Effective implementation of this regulation was however delayed at national level, so that the Commission opened infringement procedures against five Member States, including France and Germany.[5] The local loop unbundling is just one element of the implementation of the EU programme Open Telecommunications Network (ONP).

1.1.2 EU policies regarding the Internet in general

Until the second half of the 1990s the Internet was hardly included in the plans of the European Union. The EU's programmes were concentrated on multimedia and the information society. "Only in the second half of the 1990s, after a long period of ignorance and resistance, did Europeans gradually start to accept and use the network of the networks."[6]

Werle (2000) characterises the EU's activities before this policy change as the "old Information Society Approach", since the Internet remained in the background of hidden agenda. Nevertheless the European Commission and the Council started to promote the concept of information society earlier than most European governments, which triggered similar programmes in the member states. In addition the Commission managed to convince corporations and governments to abandon national egoism and to establish a supranational telecommunications regime. But in the special regard of the Internet, this period of EU politics "was characterized by considerable passive ignorance and initially even active resistance towards the Internet and the underlying TCP/IP protocol technology (...) European attention to the Internet appeared to be drawn by risks rather than opportunities."[7]

In 1999 it became clear that the information society and especially the Internet was no longer a vision but increasingly a reality. Indicators were the rapid growth of the Internet and a rapidly emerging knowledge-based economy. The European Commission identified four main handicaps, which were holding back the rapid uptake of digital technologies:

- Generally expensive, insecure and slow access to the Internet and the e-commerce
- An insufficient digitally literate online population
- Lack of a sufficiently dynamic, entrepreneurial, service-oriented culture
- A public sector which is not playing a sufficiently active role in enabling the development of new applications and services[8]

[4] SR 784.10, BBI 1996 III 1405, at http://www.admin.ch/ch/d/sr/7/784.10.de.pdf

[5] See Commission document n° IP/02/445 of 20/03/2002 on the infringement procedure in respect of Regulation 2887/2000 of the European Parliament and the Council of 18 December 2000 on unbundled access to the local loop, OJ L 336, 30/12/2000

[6] Werle (2001:1)

[7] Werle (2001: 14)

[8] European Commission (2000a: 5)

To overcome these handicaps the European Commission launched the “eEurope” initiative in December 1999 with the objective of bringing Europe online. At the Lisbon Council in March the strategic goal was declared “to become the most competitive and dynamic knowledge-based economy in the world by 2010”. In June 2000 the “eEurope” action plan was adopted by the Feira European Council. This action plan is a wide-ranging initiative to speed up and extend the use of the Internet of all actors of European society. Complementary to “eEurope”, the Commission also presented a Communication on the "Job Strategies in the Information Society" in January 2000.

The “eEurope” Action Plan details eleven action lines clustered around three main objectives:

1. A cheaper, faster, secure Internet
- Cheaper and faster Internet access
- Faster Internet for researchers and students
- Secure networks and smart cards

2. Investing in people and skills
- European youth into the digital age
- Working in the knowledge-based economy
- Participation for all in the knowledge-based economy

3. Stimulate the use of the Internet
- Accelerating e-commerce
- Government online: electronic access to public services
- Health online
- European digital content for global networks
- Intelligent transport systems

“eEurope” seeks to ensure that Europe can reap the benefits of the Information Society in a cohesive and non-divisive way. To measure and to compare the progresses and developments in the single countries of the European Union the action plan also entails a benchmarking programme. The facts and figures received from the benchmarking programme are used to evaluate the net overall impact of *e*Europe and the information society, to show the current levels of activity in key areas and to shape future policy, by informing policy-making.
The measurements are based on a list of 23 key indicators, which are taken from several sources: OECD, surveys and studies.[9] Such indicators are for example: percentage of population who regularly use the Internet, number of computers per 100 pupils or percentage of basic public services available online.
The single action lines of the eEurope 2002 Action plan are followed by numerous of measures and initiatives. Since lot of these actions have to take place in Member States and fall into nation’s area of responsibility, the success depends on cooperation and active realizations in regard of the objectives and actions. To secure an acting together the EU has in addition to the benchmarking defined concrete targets that have to be reached at a certain point in time.

[9] The complete list of eEurope Benchmarking indicators is available at http://europa.eu.int/information_society/eeurope/benchmarking/indicator_list.pdf

1.1.3 EU policies regarding the regulation of the Internet

The regulation and organisation of the Internet was no political issue in Europe until the Unites States initiated and moderated the implementation of a private, self-regulatory regime with the Internet Corporation for Assigned Numbers and Names (ICANN). In October 1998 ICANN was set up as a technical coordination body for the Internet. Created by a broad coalition of the Internet's business, technical, academic, and user communities. ICANN is assuming responsibility for a set of technical functions that must be globally unique for the Internet to function: Internet domain names, IP address numbers and protocol parameter and port numbers. In addition, ICANN coordinates the stable operation of the Internet's root server system.

As a non-profit, private-sector corporation, ICANN is dedicated to preserving the operational stability of the Internet, to promoting competition, to achieving broad representation of global Internet communities and to developing policy through private-sector, bottom-up, consensus-based means. The Board of ICANN is composed of nineteen directors:

- nine At-Large directors, five of them selected according to a online vote of Internet users worldwide.
- nine selected by ICANN's three supporting technical organisations for naming (ASO), addressing (DNSO) and standardisation (PSO)
- and the President/CEO (ex officio). [10]

ICANN is assisted in its work by Governmental Advisory Committee (GAC) which is open to all governments and a number of international organisations with a direct interest in ICANN policy, including ITU, WIPO, OECD etc. Participation in the GAC allows countries and distinct economies to influence policies concerning the management of the DNS and related functions, which are important to the overall operation of the Internet.

The EU had favoured a mixed public-private regime and a multilateral international framework for the transformation of the Internet's governance structure in contrast to the marked-oriented solution and private sector self-regulation of the Internet pushed by the US government. In the end, the EU had to accept the American leadership in the process and the establishment of a private regime, but achieved inclusion of public actors in the new organisation and adequate representation of Europeans in relevant bodies.[11]

In 2000 the Commission described its policies in regard of Internet regulation issues in the Communication "The organisation and management of the Internet. International and European policy issues 1998-2000"[12] as following:

- **Internet protocols**: Acknowledging the importance of the protocols, the Commission takes them into account in its approach to IT standardisation, including EU research projects and Internet addressing. Owing to the importance of the autonomous and neutral managing of IP addresses, the Commission considers that the developments in ICANN and its policies with regard to the allocation of IP addresses should be closely monitored. On the technical side, the Commission advocates the transition to a new generation of Ipv6 addresses based on 128 bit numbers, which will multiply the number of addresses

[10] Http://www.icann.org/
[11] Leib (2000)
[12] European Commission (2000b)

available to users. On the managerial side, it suggests to decentralise and eventually privatise the domain name management currently located in the USA.

- **Domain names:** "Given the rapid expansion of the Internet, the Commission considers that it would be very useful to create an ".EU" European top level domain (TLD) registry, in order to give the Internet domain space in Europe an additional dimension for identification and growth."

- **Intellectual property rights (IPR):** Proposal for a code of conduct to restrict current abuses of intellectual property rights. This will include identification of the categories of names to be protected and the treatment of trademarks and other recognised marks.

- **Data protection:** The commissions wants to continue the discussion with ICANN and the US authorities regarding data protection and think about policies limiting the collection, processing and use of personal registration data.

- **Competition policy:** The Commission closely monitors developments regarding the organisation and management of the Internet and ascertains whether agreements and business registration practices fall under EU competition rules.

- **Internet infrastructure:** The disparities in terms of Internet access, use, content and cost have to be rapidly reduced.

1.1.4 National governmental policies on the Internet market

The opportunities offered by new information and communication technologies, but also the competitive pressure on societies to use them have been recognised by most European governments. In the second half of the nineteen nineties, all governments and/or parliaments of the 7 selected countries have developed comprehensive strategies with regard to the Information Society. Given the dimension of this challenge, the most common procedure was that government or parliament commissioned an expert group with the assessment of the situation and the development of policy recommendations. Germany was the first country to adopt such a comprehensive strategy in February 1996, followed by most countries by Spring 1998, when complete liberalisation had become effective. In the Swiss case, the government strategy was complemented by a major private initiative, the two-year CH21 Impulse Program launched in April 2001.

These initial general strategies were supplemented in the following years by more targeted action plans, responding to technological change but also to an increased perception of ICT related problems. The EU's *eEurope* project adopted in 2000 in Feira entailed further governmental activities at national level. The most important government activities at national level were:

- the Swiss Federal Council's strategy for promoting an Information Society in Switzerland, of February 1998
- the German Cabinet's action plan *Info 2000*: Germany's way to the Information Society, of February 1996
- the Spanish Ministry for Science and Technology's framework programme *INFO XXI*: An information society for everyone, of December 1999
- the French Government's *PAGSI*, governmental programme for the Information Society, of January 1998

- a series of efforts for the development of Information Society, by the Italian government in 1999
- the Dutch government's National Action Plan Electronic Highways *Boven NAP*, of April 1998, and strategy paper *De Digitale Delta*, of June 1999
- a whole range of strategy papers and measures of the British government, since September 1999 under the coordination of a specially appointed governmental office "E-Envoy"

These strategies and other corner stone measures taken by each government are presented in detail further in this section. While the main features of the programmes – aims and instruments to achieve these aims – are fairly similar in all countries, the emphasis on particular aims or problems differs from country to country, as the following section means to show.

A common feature to all national strategies is the appraisal of the historic dimension of the ICT related developments, the German Action Plan *Info2000* of 1996 actually qualifies the situation as the transition from the industrial society to the information society.

It is interesting to note that, despite the cross-border character of the telecoms deregulation, all governmental programmes took a purely national perspective. Only in the Netherlands, the classical approach of the role of the national state was questioned, when a report of the Scientific Council for Government Policy of 1998 introduced the idea of deterritorialisation.
Just as the British government did when aiming to make the 'UK to be the best environment in the world for e-commerce by 2002', Switzerland, Germany and the Netherlands also intended to achieve an or *the* leading position in global competition of technology and infrastructure. These aims were later bundled in a European target of reaching this leading position in global competition.

The role of the state is generally seen in these programmes in providing a favourable environment for the development of new technologies, in particular in guaranteeing competition on the telecommunication markets, in adopting uniform legal conditions for supply and use of new ICT, and in actively stimulating innovation of services and infrastructure through funding of research.

At the same time the state engages in promoting the wide-spread use of these services by the population and by business. This involves major efforts in raising awareness and training of potential users, as well as the provision of equipment for access.

While there is general convergence in the way of perceiving and promoting the opportunities of the Internet, there are some national specificities in the national policies, that can be explained by differing economic settings, political systems and motivations of particular national governments. For instance, the German Schröder government whose election campaign had centred around job creation put the highest emphasis on the job creating potential of ICT as well as on the need to foster ICT literacy as a key element for employability. Likewise, the combination of direct democratic processes with new forms of political information and communication, and its inherent risks, are reflected in the Swiss government policies. Here, access for all and empowerment of all citizens to use the Internet were emphasised even stronger than in other countries, and based more on cultural and political concerns than economic ones.

The cultural dimension of the Internet was most developed in the Spanish governmental policy, namely in the two aims to use the new information technologies to: - promote Spanish culture around the globe, and - to promote the Spanish state's cultural pluralism.

The relatively higher importance of the public sector in France – compared to Britain or the Netherlands – is also reflected in the French governmental policy, which emphasises efforts in public research and education, and settling legal and security problems hindering the use of ICT.

With respect to working in the knowledge-based economy, the EU established a European diploma for basic information technology skills (ECDL) with decentralised certification procedures. This idea of PC or Internet "driving licenses" has been widely adopted by the Member States, some countries as the UK are using already created national systems and others created national certificates based on the ECDL model. The Netherlands went somewhat further by creating a Digital driving licence education for teachers. [13]

Besides some variations in content, national policies also differ with regard to the resources that are mobilised for their implementation. The British and Dutch government were taking a particularly active stance in implementing their action plans, by appointing task forces or high level officials, such as the British e-Minister and e-Envoi or the Dutch *Digitale Delta*. Such specific government officials or groups are responsible for monitoring and coordinating progress in all levels of government administration, and/or for offering a unique contact person to citizens in ICT matters. Switzerland created the post of an e-Ombudsman for this purpose.
A common feature to all governmental strategies is that they raise the problem of different opportunities to access and use the Internet among the population. In the OECD definition[14], the term "**digital divide**" refers to the gap between individuals, households, businesses and geographic areas at different socio-economic levels with regard to their opportunities to access ICTs and their use of the Internet. It reflects differences among and within countries, and raises a number of questions. Where does it occur and why? What are its causes? How can it be measured? What are the relevant parameters? How wide is it? Where is it most critical? What are its effects likely to be in the short term? In the longer term? What needs to be done to alleviate it? These questions will be addressed in chapter 2 of this report, but we will also refer occasionally to them in the following sections on national government policies.

1.1.5 Switzerland

In February 1998, after two years of preliminary work, the Swiss Federal Council formulated its strategy for promoting an Information Society in Switzerland[15]. This strategy defines four principles to be followed: Most importantly, *access for all* has to be guaranteed independently of place and time, at all levels and at affordable prices. Second, *empowerment of all* has to be assured through further training at all levels of education. Third, *freedom of development* is required in order to develop the information society through private initiative and free competition. Finally, *acceptance* of new ICT is a prerequisite for the information society and is to be achieved through a responsible relationship with the new technologies, the guarantee of basic and human rights as well as enforcement of the law. These principles should guide all activities in eight prioritised areas defined as the following: training offensive, increasing the attractiveness of Switzerland as an economic location, electronic commerce, electronic administrative communications, new forms of culture, security and availability, scientific

[13] Conseil (2000), Annex II, p. 47
[14] OECD (2001a: 5)
[15] Swiss Federal Council (1998)

follow-up and, finally, law[16]. In order to ensure the co-ordination and co-operation of all efforts, the Federal Council set up an Information Society Co-ordination Group (ISCG), which is headed by the director of OFCOM and annually publishes reports about the status of the information society project[17]. Whilst initial reports deplored the contrast between an excellent infrastructure and a relatively modest utilisation of new ICT as well as a lack of awareness, the latest study noticed considerable development towards the information society[18]. In comparison with the EU, however, shortfalls do exist in the areas of training, e-government, the recognition of the digital signature and the prevention of a digital divide in society[19]. This is why a private initiative, the CH21 Impulse Program, was launched in April 2001. Limited to 24 months, the program is meant to guarantee that Switzerland becomes one of the leaders in the area of new ICT, especially in the fields of training, government, society and enterprises[20].

By 2002, the objective that all inhabitants should have financially reasonable *access* to new ICT, regardless of time and place, is at least partially fulfilled given the fact that free access financed by advertising and local rate call costs have become commonplace. However, most PCs are in companies or administrations and Internet use still varies according to education, income or age[21]. Furthermore, only 30 % of primary schools are connected to the Internet, which is one of the lowest rates among western countries[22]. For all these reasons, the Federal Council launched the initiative "Schools on the Net", aiming at equipping all primary and secondary schools in Switzerland with the new technologies (and thus providing young people throughout the country with fast and simple access), and at enabling teachers and school organisations to integrate new ICT into their teaching in[23]. This nation-wide initiative is implemented through public-private partnership involving the Confederation, the cantons and private business. Whilst the latter provides infrastructure and services at preferential terms[24], the Confederation will focus on training and further training of teachers. For this purpose, the Federal Council decided in March 2001 to have a law drafted, by virtue of which federal support (ca. 68.5 million euro) would be provided over five years. This law was approved by Parliament in December 2001 and is expected to come into force in April 2002[25]. The cantons, for their part, assume the implementation and co-ordination of the project with existing initiatives in the field of ICT. Furthermore, they are supposed to continue the initiative by means of their ordinary budget once the time-limited commitment of the Confederation has come to an end. For the moment, a pilot phase has already started in six cantons[26] where 250 schools are currently being equipped with the new infrastructure.

[16] According to the 2nd report of ISCG, priority is now given to the three areas education, eGovernment and the legal framework for e-commerce (digital signature), at http://www.isps.ch/ger/aktivitaeten_des_bundes/grundlagen/welcome.html

[17] All documents, reports and press releases relating to the Information Society Project in Switzerland (ISPS) can be obtained at http://www.isps.ch/. This web site is the most important means of information on the activities of the Federal Government concerning the Information Society Project

[18] ISCG (1999, 2000, and 2001 respectively)

[19] ISCG (2000a)

[20] CH21 (2001)

[21] ISCG (2001: 30f)

[22] Conseil fédéral (2001: 4)

[23] DEA/DHA/FDF/DETEC (2001: 4).

[24] The following companies support the project: Swisscom, CISCO, IBM, Apple, Postfinance and yellowworld (DEA/DHA/FDF/DETEC (2001: 11).

[25] The law can be obtained at http://www.admin.ch/ch/f/ff/2001/6182.pdf.

[26] Geneva, Fribourg, Ticino, Uri, Zurich, St.Gallen (DEA/DHA/FDF/DETEC (2001: 20).

In parallel, the Federal Office for Culture and OFCOM launched the competition "Knights of Communication" for the first time last year[27]. The award encourages young people up to 30 years of age to initiate projects that contribute to the combat of a digital divide in society by bringing new ICT closer to a broad public. The award is worth ca. 34 240 euro every year, including a special award for fostering "Girls and ICT", and is sponsored by the Federal Offices, private organisations and business.
As suggested by these two projects, access for all goes hand in hand with the second principle of the Information Society, empowerment of all. Although comparatively few public access points exist in Switzerland, the present strategy does not primarily provide access by means of a better infrastructure, but focuses on the improvement of human skills, which are necessary to make use of the new technologies.

1.1.6 Germany

In February 1996, the German Cabinet passed an action plan entitled "Info 2000: Germany's way to the Information Society." The report describes the current situation and focuses on setting priorities regarding policy measures and the allocation of responsibilities within the government. Essential objectives are further liberalisation in telecommunications and the creation of uniform national legal conditions for supply and use of Information and Communication technologies.
Germany instigated decisive changes to public policy during 1997 and 1998 to ensure that it would be competitive on the way into the global Information Society. Major achievements during this period have included:

- opening up the telecommunications market since 1998
- the introduction of new multi-media services and end-user equipment
- the issuance of new laws and more than 500 telecommunications licences by the Regulatory Authority for Telecommunications and Postal Services
- reduction in telephone and Internet access costs.[28]

In the policy statement Chancellor Gerhard Schröder made upon assuming office in 1998, he emphasized the importance of today's new media and the information and communications sector as a crucial policy field for reducing unemployment. Concerning the government's view, unemployment can be successfully reduced only if Germany makes the transition from industrial society to information society as quickly as possible.

In 1999 the Federal Ministry of Economics and Technology in co-operation with the Federal Ministry of Education and Research published a governmental action programme entitled "Innovation and jobs in the Information Society of the 21st Century". A budget of 1.53 billion euro of funding has been assigned for this programme which will run for a five-year period until 2005. Apart from this measures on the federal level, the state governments have started initiatives and support programmes on the Information Society.

The primary objectives of "Innovation and jobs in the Information Society of the 21st Century" are:[29]

[27] Http://www.comknight.ch/
[28] Chatrie / Wright (2000).
[29] Federal Ministry of Education and Research/ Federal Ministry of Economics and Technology (1999): "Innovation and jobs in the Information Society of the 21st Century. Action Programme by the German Government." Bonn.

1. Wider access to the new media and access for all groups
2. Promote multi-media technologies in education
3. Improving the legal framework to strengthen confidence and security
4. Creating innovative jobs – promoting new applications
5. taking a leading position in technology and the infrastructure
6. Advancing state modernisation

Each aim is forced by numerous measures and initiatives.[30] One of them, for example, is the German government's ten-point program entitled "Internet for All", launched by Chancellor Gerhard Schröder in September 2000. The programme is based on the conviction that the transition to the information society will only be successful if all citizens have access to the new technologies. Therefore the main goal of this action plan is to enable all people to use modem information technology. In 2001 the government provided an overview of what has been achieved in the first year of the initiative.

The results are, for example:[31]

- In 2001, 98 per cent of the schools are connected to the Internet in comparison to 15 per cent in 1998.
- For the development and widespread use of high-quality teaching and learning software, a program entitled “New Media in Education” was created with a budget of more than 600 million marks.
- Until the end of 2000, 54 000 career training opportunities were provided in the ICT and media sectors.
- Since the program was initiated, 80 000 unemployed persons have obtained an Internet certificate. About 50 per cent of the participants were from the eastern German states and 60 per cent were women.

German governmental policies on enhancing women to use the Internet have been following a two-fold aim: firstly, unemployment is higher among women than among men and therefore training women in ICT is an instrument for improving their employability (in particular for mothers and elder women); secondly, training women in the use of ICT for private purposes is meant to prevent or reduce the gender specific digital divide.
This two-fold approach is applied by the joint action of the Federal ministry for Education and Research, the Federal Employment Agency, the most widespread women's magazine Brigitte, the Deutsche Telekom and a civil society group (*Verein Frauen geben Technik neue Impulse e.V.*), “Women on the net” (*Frauen ans Netz*)[32]. Since 1998, more than 100 000 women have participated in the Internet courses of this initiative. Further 13 000 women are expected to participate in spring 2002, when the initiative organises 1 450 courses in 137 cities. New approaches will be tested, such as offering child care during the lessons, and installing laptops in schools or libraries in order to reach women in small municipalities.

1.1.7 Spain

The main guidelines of Spanish government policy with respect to Internet are contained in the **framework programme INFO XXI: An information society for everyone** *(La sociedad de la información para todos*). This framework programme has been developed by

[30] For information about actions in detail and on related developments see: http://www.iid.de/aktionen/index.html
[31] The complete text is available at: http://eng.bundesregierung.de/frameset/index.jsp
[32] Http://www.frauen-ans-netz.de/

the Spanish Ministry for Science and Technology. It contains a series of objectives, programmes, and measures aimed at promoting the information society in Spain and make access to information technologies available to all. The background for this framework programme were the 1994 Bangemann Report and the 1996 European Commission Communication (see above). Since this date, all public administrations in Spain have been adopting measures to implement this action programme.
The INFO XXI initiative attempts to facilitate and coordinate the policies in the field of new information technologies adopted by different Ministries and public institutions and by other economic, social, and institutional actors with a stake in the development of the information society in Spain. Until now, the Spanish Public Administration has passed **laws and regulations**, and adopted **measures** in the following fields:

1. Liberalisation of the telecommunications market and development of telecommunications infrastructures. Fourteen law projects and one hundred and two regulations to develop those laws have been adopted thus far. In addition, measures have been taken to facilitate the use of new technologies, to regulate services and tariffs, and to regulate the development of Internet and Internet, and to improve security in Internet.
2. Modernization of the infrastructures used by the Spanish Public Administration.
3. Priority attached to the funding of research related to the new information technologies. Resulting from this priority, in the period 1997-1999 39 % of all research funds allocated by the Spanish National Research Agency were assigned to projects related to the information society.
4. Development of measures to improve access to new information technologies in the education sector. Since 1996, more than 42 million euro have been invested and more than 100 000 teachers have received instruction on how to use these new information technologies. In addition, the Spanish Public Administration has developed and distributed multimedia products, provided access to Internet to all centres for public education and to all public school teachers. In addition to this, the Ministry of Education hosts more than 51 000 Internet accounts and provides education via Internet to more than 14 000 students. According to a Council report, 80 % of the primary schools and 95 % of the secondary schools in Spain are already connected to the Internet.[33]
5. Development of specialized groups and forums to discuss and reflect on new developments connected with the new information technologies.
6. Coordination of activities between different sectors of the Spanish Public Administration.

The main **objectives** of the Initiative INFO XXI are:

1. To make new information technologies available to all.
2. To ensure that citizens are prepared to work in jobs that require the use of new information technologies.
3. To develop the necessary infrastructure and the juridical instruments needed to promote the development of the digital economy. In particular, to invest in the development the legislation and the infrastructure that are necessary to make access to broadband Internet services (ADSL) widely available and affordable to all.
4. To use the new information technologies to promote Spanish culture around the globe.
5. To use the new information technologies to improved the population's quality of life.
6. To promote innovation and technology development in the information society sector.
7. To develop e-commerce and use the new information technologies to promote Spanish companies.
8. To use the new information technologies to improve the citizens' access to the public administrations.
9. To promote the companies' use of new information technologies.

[33] Conseil (2000), Annex II, p. 42.

10. To use the new information technologies to promote the Spanish state's cultural pluralism.

The budget for this initiative represents yearly expenditures of about 820 million euro per year during the 2000-2002 period. These funds will be spread across different government ministries.

1.1.8 France

In January 1998, the French Government launched the comprehensive governmental programme for the Information Society *PAGSI* (*Plan gouvernemental d'action pour la société de l'information)*.
On 13 March 2000, a Parliamentary bill recognized the juridical value of 'online signatures'.
Further to PAGSI, the Council of ministers examined a project for a government bill on "the Information Society" on 13 June 2001. The bill seeks to promote confidence in networks by guaranteeing the freedom of public communication, clarifying the legal framework for online trade and increasing security in the information society. It also wants to widen Internet access and the territorial reach of networks of communication.
French Government policy focused on access for all, on systematic introduction of ICT in schools and on promoting research and development on ICT.

Stimulation of ICT use by the broad public - access for all
Wider access: 7000 public access Internet stations will be opened among which 2500 numeric public spaces (in libraries, city councils, etc.) where people will be trained in new technologies. The whole territory should soon have access to high-speed connection (6 % of the population is already connected) although some reports say it may take years in fact.

Stimulation of the connection of schools to Internet
98 % of upper high schools (*lycées*) had Internet access in September 2000, 30 % of primary schools (50 % in August 2001) and 89 % of the junior high schools (*collèges*). In August 2001, there was one computer for 6 pupils in *lycées* as opposed to 1 for 23 pupils in 1997, 1 for 14 in junior high schools (*collèges*) as opposed to only 1 for 26 pupils in 1997. Each curriculum now has a 'new communication technologies' aspect. Editors are encouraged to produce online contents.

Research and Development:
In July 2000, the government decided to release a 152.4 million euro fund for public research and to raise the number of researchers in new technologies of information and communication by 25 %.
The research institute INRIA staff will rise from 755 people to 1180 and the budget has already risen by almost 10 million euro in 2001. The CNRS department on information and communication will hire an additional 40 researchers.
Measures have been taken to help the funding (through 'business angels' for example) of new companies in the communication sector. In 2000, 1 out of 15 new companies were in the new ICT sector which contributes to 20 % of the Gross National Product growth since 1996 and employs almost 3 million workers.

1.1.9 Italy

At the end of 1997, following with some delays the European Commission directive on liberalisation, Italy started to open its telecommunication market. After the liberalisation, new operators (Wind-Infostrada, Albacom, Edisontel, Atlanet, e-Biscom,…) entered the market and new technological infrastructures based on optical fibres were posed. Nevertheless those new infrastructures cover a very limited part of the country and they are not competitive with the old infrastructure of Telecom Italia based on copper.
The reorganization of telecommunication market started in Italy with law 249/97, which had a series of significant consequences. It established the transformation of the minister of post and telecommunications in the new minister of communications.
The Italian way to the information society has followed two parallel paths characterized by the absence of an organic law settled by the political centre and by an active role of the local actors which assumed an important function in the development of ICTs. The assumption of a central role by local administrations has been stimulated by a series of reforms: the direct election of the mayor of districts (*Comuni*); the attribution to local administrations of a more ample organizational autonomy; the reform of the public administration.
After a phase of relative stasis of the government, in 1999 it intensified the efforts for the development of Information Society. Three new structures have been instituted: the ministers' committee, the group of study and inter-ministerial job and the Forum for the Information Society. The last one represents a political arena open to debate and mediation, capable to involve a large number of social actors.
The liberalisation of telecommunication market was supported and controlled by a series of authorities: the communication authority, the data protection commission, the authority for information technology in public administration, the competition authority.

1.1.10 Netherlands

The Dutch government seems to make a rather far reaching attempt to stimulate the active use of ICT by the private sector, the government itself and the citizens. It has set up a large number of institutions and undertaken a wide range of activities. With a 5.55 per cent share of GDP in 1999, and particularly high growth rates, the ICT sector is of evident importance for the Dutch economy. Nevertheless, national investment in research and development is lagging behind. Therefore, the Ministries of Economic Affairs and Education set up an action plan on competition in ICT competences in 2000. It has three goals: translating ICT knowledge into practical applications, strengthen the infrastructure of ICT technology and improved efficiency of ICT knowledge.

It is first of all the Directorate General for Telecommunications and Post of the Ministry of Transport, Public Works and Water Management that is responsible for a competitive ICT market. Its agenda has been set out in the nota '*Netwerken in de Delta'*, which stresses a further liberalisation of the market for ICT infrastructure, stimulation of competition between infrastructures, safeguarding availability of new services and an efficient use of the available frequencies. The aim was to stimulate innovative services. The first steps to consistently regulate the telecommunication market in the Netherlands were taken in February 1998 by the presentation of the legislation of the electronic highways (*Wetgeving voor de electronische snelweg)* by the Minister of Justice.
The widespread discussion on ICT in the Netherlands was however rather initiated by the publication of a study by the Scientific Council for Government Policy (WRR) in March

1998; '*Staat zonder land*'. The title refers to 'deterritorialisation'; the idea that functional and territorial aspects may be further disintegrated as a result of the growth in ICT, thereby on the one hand limiting the regulative and directive capacities of the state, on the other hand provide impulses for globalisation as well as regionalisation and localisation. The report equally hinted towards a declining identification of people with the nation state as a result of enhanced importance of both international aspects and regional ones. However, since social interaction was believed to remain primarily national, the state would not become superfluous overnight. Consequently, adaptation of the national government to the new situation was deemed necessary. In order to do so an open and explorative attitude was recommended.[34]

In April 1998, the National Action Plan Electronic Highways (*Herijking Actieplan Electronische Snelwegen – Boven NAP*[35]) was approved, and on 21 June 1999, the government as a whole published a paper '*De Digitale Delta'*. Point of departure was that the Netherlands had the ambition to be one of the core countries on the electronic highway and the aim was therefore to give the country an excellent ICT basis. The policy had five focus points: (tele)communication infrastructure, knowledge and innovation, accessibility and know how, legislation and finally ICT in the public sector. Consequently, the governmental organisation *de Digitale Delta* became responsible for ICT in the Netherlands and its tasks include: liberalisation of the telecom market, the action plans E-commerce and E-government, legislation for Internet etc.
Other initiatives at the national level were the programme for 'Technology and Society' of the Ministry of Economic Affairs and the activities of the Rathenau Institute on the integration of new technology in society. Finally, there was the Action ICT for education and the Milennium Platform, which was responsible for a smooth changeover to the year 2000.[36] The activities of *de Digitale Delta* would have a time horizon of three to five years.
In September 1999, the Dutch government set up an additional think-tank on ICT, which would during a period of two years execute studies, write reports, organise conferences and other activities in order to contribute to the national decision-making on ICT. Its time perspective would be longer than that of the *Digitale Delta.* The organisation*, Infodrome*, fell under responsibility of the Ministry of Education, Culture and Sciences, was steered by the secretary of state for culture and advised by a committee in which the directors of all ministries were represented. Its mission was threefold: obtaining an overview of the societal consequences of the information revolution; organising and providing input in the public debate on the role of the authorities in this process and finally advising the government on strategic choices. The research would be focused on eight policy areas: education; citizenship and safety; living; sports and culture; welfare; science; environment and international relations.[37] In October 2000, mid-term conclusions were published. Four types of public policy with regards to ICT were identified: regulation of the ICT infrastructure; stimulating the use of ICT in society; development of e-government and anticipation of the changes in society under influence of the Information Age and the changed role of the authorities. The latter type was explicitly the focus of Infodrome.

In May 2000, the Minister of Urban and Integration Policy published 'Contract with the Future' (*Contract met de toekomst*), in which three themes were central: freedom in solidarity, a vision on the electronic relationship government-citizen; the approachable government and a dynamic government. In early 2001, the stimulation program '*Subsidies telecommunicatie'* has been initiated; aimed at the use of new (tele)communication technologies. On of the

[34] WRR 1998.
[35] Herijking Actieprogr. Elektronische Snelwegen 'Boven NAP', April 1998, Kamerstukken II, 24 565, n°6.
[36] Infodrome 1999.
[37] Infodrome 1999.

bigger projects in that framework is '*Kenniswijk*' (neighbourhood of knowledge); a large-scale experiment with a progressive communication infrastructure and consumer oriented services, that explores the possibilities of new technologies and its effects on society. Another project is *de digitale trapveldjes*; initiatives in less developed urban areas, meant to stimulate Internet access and literacy.
On 6 September 2001, the ICT and Government Advisory Committee published its report 'Citizen and Government in the Information Society, the need for institutional innovation'. On 27 August 2001, a special committee on Government Information published its report 'In service of democracy' (*In dienst van de democratie*). Both reports advocate a more intensive use of internet in the publication of information and data held by the authorities. On the website of ON21 (http://www.on21.nl), a common body for all Dutch public authorities specialised in practical ICT applications, citizens can ask questions and give their opinion on all aspects related to the public sector and ICT.
The Dutch government policy on electronic administration and democracy are presented in the sections on e-government *(1.4)* and on e-voting *(1.6)* of this report.

1.1.11 United Kingdom

It has been argued that public provision of technology services 'has always been key to their availability and diffusion' and that public policy and government subsidy have 'often played an important role'[38]. The government has been extremely active on 'information age' policy, and has set numerous ambitious targets, such as universal citizen access to the Internet by 2005, the UK to be the best environment in the world for e-commerce by 2002, all government services to be provided online by 2005, and the UK to have the most competitive and extensive broadband market in the G7 by 2005. Whether it can realise such targets remains to be seen, but in the meanwhile a report published by the centre-left thinktank the Institute for Public Policy Research in November 2000 argued that the UK government 'is ahead of most in responding to the challenges of online media'[39].

These developments beg the question of why the government has promoted ICTs with such enthusiasm. Reasons given in government communications usually relate to strengthening democracy, combating social exclusion and fostering economic growth. The first is crucial for the current government given the electoral apathy among the UK population, particularly among voters under 40, that was evident in the 2001 election results. Representing the Cabinet Office at a Global Forum in Naples in 2001, Minister Graham Stringer expressed the view that 'we must open up new democratic channels, through which government can relate to its citizens'[40]. Stringer also stressed the importance of bridging the 'digital divide', contending that 'if we are to develop the Internet into a new democratic tool, Government must ensure that everyone - irrespective of age, gender, profession or geographical location - has access to it and the skills to use it'. The government also sees ICTs as a key factor in Britain's future economic growth, as Tony Blair's argument that 'countries that wholeheartedly embrace e-commerce will benefit from improved national economic performance'[41] suggests. This combination of opportunities presented by new technologies for increasing citizen engagement in the political process, making inroads into problems of

[38] Stewart (2000: 2).
[39] Report in conjunction with NGO Citizens Online, at http://www.citizensonline.org.uk/pdf/universal.pdf.
[40] Cabinet Office press release CAB 074/01, 'UK Minister leads call for e-democracy at Global Forum', 15 March 2001
[41] Tony Blair, foreword to PIU (1999).

social exclusion, and generating higher economic growth points to why the UK government has been so keen to engage with and advocate ICTs.

Governmental actors responsible for Internet policy

The Labour administration elected to office in May 1997 has been highly proactive in the area of Internet policy. This is an issue that cuts across government departments; responsibilities lie with the Department of Trade and Industry (e-commerce), the Department of Education and Employment (access, communities and social inclusion), the Cabinet Office (e-democracy) and the Home Office (Internet surveillance and security) among others. Since September 1999 there has also been a governmental office dedicated purely to generating and delivering Internet-related initiatives, the Office of the E-Envoy. The office was created following a recommendation of the government's Performance and Innovation Unit's report on e-commerce, and is currently headed by Andrew Pinder, who was appointed e-Envoy in January 2001.

The prime movers in government Internet policy are Pinder and Trade and Industry Secretary Patricia Hewitt, Labour's 'e-minister'. Hewitt's role is to advocate the government's Internet agenda at Cabinet level, provide the Prime Minister with monthly progress reports, and take overall responsibility for governmental Internet strategy. At a political level, she is supported by a network of colleagues across Whitehall, known as 'e-Ministers'. Furthermore, at an official level, the e-Minister and e-Envoy are supported by a group of 'e-Champions', a group of senior officials from each government department. As this indicates, responsibilities for Internet policy across government are clearly structured.

In addition to the Office of the e-Envoy, the government has also sought to involve significant sectors of UK society in achieving progress towards its Internet policy goals, primarily via the creation of the organisation UK Online, a partnership between government, industry, the voluntary sector, trade unions and consumer groups. The organisation's 'citizen portal', www.ukonline.gov.uk, is intended to evolve into a place where citizens can interact and transact with government online, which may in time lead to extensive policy consultations[42].

UK Online Strategy

The central plank of the UK government's Internet agenda is the UK Online Strategy, which it describes as 'the government's programme to ensure that the UK is a world-leader in the new knowledge economy'. The strategy's stated mission runs as follows:

"Electronic commerce and the Internet are transforming economies and societies across the world. The Government is committed to giving every individual, business and community in the UK the opportunity to participate fully in the benefits flowing from these changes - in short, to getting the UK online."[43]

The strategy was first published as part of the e-Minister and e-Envoy's first Annual Report in September 2000, in order to drive forward progress in the areas of electronic commerce and the Internet. It sets out a range of recommendations for action, and the e-Minister and e-Envoy report to Tony Blair monthly on progress towards the strategy's aims. Its three central goals are:

- To ensure that everyone who wants it has access to the Internet by 2005
- To make the UK the best environment in the world for e-commerce by 2002
- To make all public services available electronically by 2005

[42] Cabinet Office press release CAB 074/01, ibid.

[43] E-Minister and E-Envoy Annual Report 2000, at http://www.e-envoy.gov.uk/ukonline/progress/anrep1/default.htm

The three targets are clearly ambitious, particularly the first aim of ensuring universal access to the Internet in the UK by 2005. The government maintains that good progress is being made, pointing to evidence such as the UK being ranked second among the G7 countries by the Economist Intelligence Unit's (EIU's) e-readiness rankings in May 2000. However, many are sceptical about the government's ability to deliver on the three targets; research conducted by MORI in November 2001 showed that most IT journalists in the UK 'do not believe that their government will succeed in its plans for widespread Internet access'.

Access for all? Government policy on ICTs and social exclusion

James Stewart notes that 'some of the poorest and most 'excluded' in the country are also the most important consumers of government service (the retired, the disabled, the unemployed, those living in economically depressed areas')'[44]. Some of the government's targets, such as the delivery of government services on the Internet, are conditional on socially excluded groups actually having access to the Internet in the first place. A Policy Action Team on ICTs and social exclusion (PAT 15) was set up by the government's Social Exclusion Unit and reported in February 2000. Its report blamed the cost of Internet access and lack of a clear government policy for putting people in the poorest parts of the UK at the risk of digital exclusion. It identified clear links between social exclusion and digital exclusion, concluding that 'lack of access to ICTs leads to or reinforces disadvantage' and that 'people who live in deprived neighbourhoods are less likely to be able to use the most common methods of training or points of access to ICTs'. The report argued that since gaining and using ICT skills can lead to opportunities to participate fully in the local and national economy, 'the arguments for social inclusion and for economic development in the Information Age are mutually re-enforcing'. It identified barriers to citizen involvement with ICTs and set out a number of recommendations to ensure that government actions 'to promote the use of ICTs and e-commerce are coherent and reduce social exclusion'.

Stewart also argues that social exclusion 'is a major focus of government policy, and the promotion of ICT literacy and use is seen as a way of dealing with 'social exclusion' in deprived areas'. Following the PAT 15 report, by the end of 2000 the measures taken by the government to combat the 'digital divide' included the following:

- Creation of public access centres for learning and use of ICTs and the Internet. For example, around 700 government-funded ICT Learning Centres have been set up across England, particularly targeted at disadvantaged communities, while public libraries have been encouraged to install Internet terminals. One of the key measures through which the government is trying to ensure universal access is the creation of UK online centres - walk-in high street locations where the Internet can be used - which are being set up across the country at the time of writing.
- University for Industry initiative, which aims to provide training resources to industry which are supported by the use of computers and the Internet. This involved the setting-up of almost 1000 'Learn Direct' centres by 2001.
- Purchasing of computers for low-income families. 'In October 1999 the government announced money to buy computers for 100,000 low income families, recognising the limitations of public access centres for use of the Internet'[45].
- A number of initiatives to support disabled access to computers and the Internet.

The government has also sought to combat rural exclusion from Internet technologies, via projects such as the Highlands and Islands University, which enables students in geographically isolated areas of Scotland to have home access to electronically supported

[44] Stewart (2000: 29).
[45] Stewart (2000: 35).

further and higher education. Since 2000 further wide-reaching initiatives have been introduced to combat social exclusion from new technology, such as the Department for Education and Employment's 'Wired Up Communities' programme. The initiative, aimed at preventing the emergence of a 'digital underclass', is to provide Internet and digital access to 12,000 homes in six deprived communities across England from 2001 onwards[46].
The government has shown evident commitment to closing the 'digital divide' but has not gone uncriticised. Some have pointed out that improved web access does not automatically improve social exclusion; indeed, recent research has shown that Internet-connected kiosks put in libraries and shopping centres were being used more by those already online than by the 'digitally excluded'[47]. While this finding is perhaps unsurprising, it does point to the difficulties inherent in combating the digital divide for any government.

Government policy on Internet technology

The government has been vocal in promoting broadband (high-speed) Internet access. *UK online: the broadband future*, an action plan to facilitate the roll out of broadband and higher bandwidth services across the UK, was published on 13th February 2001 by the e-Minister Patricia Hewitt and the e-Envoy Andrew Pinder. The strategy sets out a new goal for the UK to have the most competitive and extensive broadband market in the G7 by 2005. However, broadband is rolling out more slowly than was touted, leading to mounting criticism of the government's policy in 2001, with surveys suggesting the UK was falling behind the rest of the world in its rollout of broadband services[48]. Since BT owns the majority of telephone lines into homes, it is seen as crucial to enabling UK-wide access to broadband services. However, the company's record on broadband to date is poor; while T-Online has connected 2.6 million customers to ADSL services in Germany, BT has managed just 45 000. Since formerly public British Telecom was privatised in 1984, the government has little control over telecommunications infrastructure, while many other countries are able to roll out infrastructure in a uniform way because it is publicly owned.
Contrary to the government's hopes, research from Jupiter MMXI has predicted that only 30 % of online households in the UK will have a broadband connection by 2005, just 15 per cent of all homes. Such findings have significant repercussions for the government's efforts to close the digital divide. Since ADSL and cable are confined largely to towns, the 'very real danger' of no broadband access in rural Britain calls the government's digital divide policy into question.

[46] Matt Weaver, 'Internet Revolution for Deprived Areas', Society Guardian, Friday 16 March 2001.
[47] Report from Virtual Society Research Project, University of Oxford, http://virtualsociety.sbs.ox.ac.uk, reported by Mark Ward, 'Internet divides society', for BBC Online News Tuesday 23 May 2000, http://news.bbc.co.uk/hi/english/sci/tech/newsid_760000/760867.stm.
[48] Jane Wakefield, 'E-minister: Britain will be broadband leader', Tuesday 24 April 2001, at ZDNet UK, http://news.zdnet.co.uk/story/0,,t269-s2085802,00.html.

1.2 Decision making structures: National competition law and regulatory authorities

1.2.1 Overview

The legal bases for EU politics in regard to the information society and especially to the Internet are defined by the Commission as:

- the telecommunications policy, whose legal basis is to be found in Article 95 (Internal Market harmonisation), articles 81 and 82 (competition) as well as articles 47 and 55 (right of establishment and services) of the TEC;
- the support to technological development in ICTs, which is based on articles 163 through 172 (research and development) of the TEC;
- the contribution to creating the necessary conditions for the competitiveness of the Community's industry, in line with article 157 of the TEC;
- the promotion of trans-European networks (TEN) in the transport, energy and telecommunications sectors, as stipulated in Articles 154, 155 and 156 of the TEC.[49]

Since the mid-nineties, the EU has produced vast secondary legislation on the basis of these stipulations the field of telecommunications and later on electronic communications. With a view to simplify these rules, and to adopt them to the market evolution, the Commission proposed a new Framework directive accompanied by four specific directives based on Article 95 of the Treaty: Directive on authorisations and licensing (including rules for the effective management of, and access to, scarce resources), Directive on the provision of universal service, Directive on access and interconnection, Directive on data protection and privacy in the telecommunications sector.

A common framework for general authorisations and individual licences in the telecommunications sector was already established by an EU Directive[50] due to be implemented by the end of 1997. Despite this, the licensing regimes still vary considerably from one Member State to another. In the European Commission's view, "this manifestly militates against a competitive market for communications services and convergence between services, networks and technologies"[51] For bridging these two gaps created by the fragmentation of Europe's telecommunications markets, the Commission proposed a new Directive replacing the one of 1997, aiming at a rigorous simplification of the national regimes based on the lightest regimes.

Since the EU rules on competition in this field are fairly detailed, prescribing for instance that Member States must designate a regulatory authority for the telecoms market, the main decision making structures at national level are fairly similar throughout the EU. The national regulatory authorities responsible for applying EU and national legislation, and their respective scope of action are presented hereafter separately for each country.

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[49] European Commission database Scad-plus, at http://europa.eu.int/scadplus/leg/en/lvb/l24100.htm.

[50] Directive 97/13/EC[50] of the European Parliament and of the Council of 10 April 1997 on a common framework for general authorizations and individual licences in the field of telecommunications services (OJ L 117 of 7 May 1997).

[51] European Commission database Scad-plus, at http://europa.eu.int/scadplus/leg/en/lvb/l24164.htm. The adoption of the Directive by the Council and the EP is pending (approbation acte PECONS: 3671/01, LEX : 323 (2000/0188 COD) probably adopted by the Council on 14 2 2002, not yet published.

1.2.2 Switzerland

Since the liberalisation on 1 January 1998, the Swiss Federal Council and the Federal Department of Environment, Transport, Energy and Communications are the competent authorities for media politics, whereas the telecommunications sector is regulated by the newly created, independent Federal Communications Commission (ComCom)[52].
ComCom assumes the role of the licensing and market regulatory authority for the telecommunications sector. Its main competencies consist of

- the granting of licences for operators of telecommunications services and for universal service licences,
- laying down conditions for interconnection and
- deciding on measures to be taken in case of a violation of the applicable law.

ComCom is assisted by the Federal Office for Communications (OFCOM) in the implementation of the legislation, with OFCOM being delegated to grant licences for telecommunications services that are not subject to an invitation to tender, which is the case of the fixed network.
OFCOM is the examining and executive agency in the sphere of regulation of the telecommunications market. In its role as the monitoring authority, the Office ensures also the concessionaires' compliance with international and Swiss law on telecommunications, its implementing provisions and their own licence

OFCOM, delegated by ComCom, grants licences and publishes a daily updated list of ISPs on its homepage[53].

1.2.3 Germany

Since the entry into force on 1 August 1996 of the telecommunications act TKG (*Telekommunikationsgesetz*), the competence for regulating the telecoms sector is held by the Regulatory Authority for Telecommunication and Posts, Reg TP (*Regulierungsbehörde für Telekommunikation und Post*).[54] This independent federal authority was created on the basis of the former federal ministry and federal agency for post and telecommunication (BMPT and BAPT) and is now in the portfolio of the federal ministry for economy. The main task of Reg TP, which became operational on 1 January 1998, is to foster liberalisation and deregulation of the post and telecoms market. For achieving this aim, the authority was given information and investigation rights as well as sanction rights. Its decisions can be challenged in court, but cannot be reviewed by the controlling institution (i.e. the ministry). Reg TP may decide to involve concerned businesses in the decision making process.

Besides the TKG, which regulates the competition aspect, the telecommunications sector is subject to two other main legal instruments: the federal act IuKDG (*Informations- und Telekommunikationsdienstegesetz des Bundes*) and the media service treaty between the German *Länder* MDStV (*Mediendienste - Staatsvertrag der Länder*).

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[52] Established by the Federal Council according to the LTC of 30 April 1997 (art. 56, para. 1, LTC), and composed of five to seven specialized members.

[53] For Switzerland, the term ISP refers to companies that provide either access to the Internet and offer mostly own services such as news or e-mail (Access-Providers) or provide only memory space on their web-servers (Hosting-Providers). At http://www.bakom.ch/Service_Provider_Liste/All_Types.htm

[54] Http://www.regtp.de/.

For most of the electronic services in the information society, the stipulations of the general Act against restriction of competition (*Gesetz gegen Wettbewerbsbeschränkungen*) apply, a separate competition law is only necessary for the core telecoms market.

1.2.4 Spain

Responsibility for regulation and policies regarding the Internet lies on two major institutions: The Commission for the Telecommunications Market at the Spanish Ministry of Economy and the Spanish Ministry for Science and Technology respectively.

The Commission for the Telecommunications Market was created in 1996, as part of a government decree for the liberalisation of the telecommunications sector. The Commission is the institution responsible for regulating all matters concerning the telecommunications market. The law 12/97 indicates that the Commission's goals are to guarantee the existence of true competition in the telecommunications market and the development of adequate pricing policies, and to play the role of arbiter in case of conflict.

The Spanish Ministry for Science and Technology (created in year 2000), through the Secretary of State for Telecommunications and the Information Society, is the main institution responsible for policy regarding Internet, and coordinates its efforts with the Intergovernmental Commission for the Information Society and New Technologies. The MST is responsible for the drafting of legislative proposals, for the promotion and development of advanced infrastructures and services, for the design and execution of projects aimed at facilitating the use of information technologies in all contexts, for the planning, administration, and control of scarce resources in the field of telecommunications, relations with and control of the activities of service and access providers, and for controlling, inspecting, and sanctioning in topics related to telecommunications, audiovisual media, and the information society.

1.2.5 France

Two main institutions are in charge of the regulation of the Internet in France: the CNIL (see section "e-safety" below) and the ART (*Autorité de régulation des télécommunications*)[55].
The first one, deals with 'ethical' problems raised by computer technologies and, later on, Internet (secrecy, private life) while the second one regulates the telecommunication sector which includes the Internet.
The independent administrative authority ART was created on 5 January 1997. This creation was directly linked with the opening, in application of European laws, of the telecommunication market to competition (bill of 26 July 1996, effective in January 1998). Its role is to allow for an optimal functioning of the telecommunications market. The ART is composed of 5 members: 3 of them nominated by the President of the Republic and 2 by the presidents of each legislative chambers (*Assemblée nationale* and *Sénat*). The authority:

- Is consulted over legislative bills and executive regulations concerning telecommunications, technical rules.
- Scrutinises company requests for access to the telecommunications market, and transmits them to the executive body.

[55] Http://www.art-telecom.fr

- Evaluates the cost and tariffs of the public service in telecommunications.
- Receives complaints from actors of concerned sectors.
- Must ensure an equality of treatment between all the actors.

1.2.6 Italy

The Italian communications authority (*Autorità per le garanzie nelle comunicazioni*)[56] was founded in the July 1997 and it was finally implemented in March 1998. According to the law 249/1997 that instituted the authority, it operates "in full autonomy and with independence in judgement and evaluation".
Its activity of guarantee concerns the liberalisation of the telecommunications sector, control on tariffs, promotion of technological innovation, etc. The institution of a unique authority of guarantee concerning all sectors of communication is a novelty in the European context. Some countries have recently adopted some reforms inspired by the Italian model of a unique authority.
The authority was created to satisfy the strong European Commission determination to liberalise the markets, particularly the telecommunications market. In Italy the liberalisation of the telecommunications market was accompanied by an almost total privatization and the change of ownership of the incumbent.
The Italian government did not provide an organic law for the liberalisation of the telecommunications market: "the adoption of European directives concerns specific acts and not general laws; [the adoption occurs] often late in comparison to the community indications".[57]
The authority has promoted the unbundling of the local loop, through the lease of the line owned by the incumbent to new service providers. This decision was made in order to grant competition and to favour the access of new operators to the market. The unbundling of the local loop allows new operators that enter in the market of telecommunications, where the presence of the ex-monopolist is still strong, to establish a direct relationship with the final consumer.
In this way, operators other than Telecom Italia can offer the whole range of telecommunication services, including access to broadband.
After the conclusion of the process of liberalisation the authority solicits the evolution of the fixed networks toward the broadband, the integration between networks furniture and transmission of data, as well as the digital revolution in the television market.

Besides the Italian communications authority, there are three other authorities involved in the field of Internet regulation in Italy: the Data Protection Commission (see the section on E-safety and regulation of Internet content), the Authority for Information Technology in the Public Administration (see the section on e-government), and the Italian Competition Authority.

The Italian Competition Authority (*Autorità garante della concorrenza e del mercato*)[58] has recently opened a series of procedures against Telecom Italia for abuse of dominant position. The Authority has also made a stand against Telecom Italia's intention to merge with other operators. Hence the Authority promoted investigations "to avoid that the ex-monopolist

[56] Http://www.agcom.it/.
[57] Http://www.agcom.it/provv/relaz_99/rel_p02.htm.
[58] Http://www.agcm.it/.

could use some dominant position already acquired, in order to reduce the number and possibilities of competitors in new markets"[59].
Telecom has tried to conquer a dominant position in the market of services of connection to the Internet, imposing particularly disadvantageous contractual conditions for the access to the telephone network to its competitors.[60]

1.2.7 Netherlands

The Independent Post and Telecommunication Authority OPTA (*Onafhankelijke Post en Telecommunicatie Autoriteit*) is an independent organisation that has been supervising the Post and Telecommunication Market in the Netherlands since 1 January 1997. It was created under pressure of the parliament and in reaction to the requirements of European legislation in this policy field. The OPTA law came into force on 1 July 1998.[61]

The National Competition Authority and the OPTA produced a common Report in December 2001 on competition amongst Internet providers. One of their conclusions was that there is a separate market for smallband point-casting (by telephone) and broadband point-casting providers (by means of cable or fast telephone; xDSL). So far, no formal decision has been taken on the matter. For the moment therefore, small band connections fall under the regular telecommunications law, whereas there are no provisions for Internet providers by cable. The OPTA notes that the market position of KPN is particularly strong as it offers both small and broadband connections and network access. Nevertheless, it deems that there is sufficient competition.[62]
In December 2001, the OPTA equally decided that earlier limitations for FRIACO (Flat Rate Internet Access Call Origination) to users of an ISDN-line were abandoned. As practical arguments of limited capacity were no longer valid after improvement of the infrastructure, it was deemed unfair that consumers were being discriminated against on the basis of their type of telephone line. Moreover, it was expected that flat rates would enhance Internet usage.[63]

1.2.8 United Kingdom

The governmental Department of Trade and Industry (DTI) has pledged 'to create a unified regulator responsible for the communications sector', to be called OFCOM. This replaces the current regulatory structures (composed by Broadcasting Standards Commission, Independent Television Commission, Oftel, Radio Authority, and Radio Communications Agency). Besides OFCOM, there will be four additional regulating bodies, which are already competent under the current setting (BBC Board of Governors, British Board of Film Classification, Office of Fair Trading, Sianel Pedwar Cymru (S4C)).

At present Internet communication is largely regulated by the Office of Telecommunications (Oftel), which is the regulator for the UK telecommunications industry, set up in 1984. Internet competition is regulated by Oftel and the Office of Fair Trading (OFT). The new

[59] *Autorità garante della concorrenza e del mercato* 2001.
[60] *Autorità garante della concorrenza e del mercato* 2000.
[61] With regard to competition legislation for Internet providers, there are different arrangements in the Netherlands for different types of Internet access, depending on the kind of technology.
[62] OPTA, 'consultatie document Internet toegang', 20 March 2001.
[63] OPTA, Press release, 'Geen beperkingen meer voor internet tegen vast bedrag', 4 December 2001.

regulator OFCOM will be an independent regulator, acting at arm's length from the government but working closely with relevant governmental departments such as the DTI and the Department of Culture, Media and Sport. It has been described as the 'Great Dane'[64] of regulators, given its wide-ranging responsibilities for the regulation of electronic communication networks and services as well as the licensing of broadcasting services. It will also have concurrent powers with the OFT to exercise Competition Act powers for the communications sector. Its central regulatory objectives are likely to be protecting consumer interests, ensuring quality of broadcasting content and regulating Internet content.

The government claims that the creation of OFCOM will 'simplify the regulatory framework while maintaining the ability to apply different types and levels of regulation to individual media for as long as necessary', and should also 'end the double jeopardy of the current system where the same issue could be examined in parallel by different regulators'[65]. Criticisms levelled at the proposals for OFCOM suggest that it will be simply too massive a regulatory body to work effectively. However, OFCOM will have more power to promote competition among monopolies, state-owned organisations and companies than Oftel, which faced criticism from some quarters of the telecommunications industry for being too 'soft' on British Telecom. As such the new regulatory structure is likely to have wide-ranging consequences for the structure of the UK electronic communications industry.

Telecom and Internet industries are obliged to operate under the UK Competition Act 1998. The Act is designed to make sure that businesses compete on a level footing by outlawing certain types of anti-competitive behaviour. The Office of Fair Trading has strong powers to investigate businesses suspected of breaching the Act and to impose tough penalties on those that do.
The Competition Commission is an independent public body established by the Competition Act 1998 and replaced the Monopolies and Mergers Commission on 1 April 1999. The Commission has two distinct functions: on its reporting side, to carrying out inquiries into matters referred to it by the other UK competition authorities concerning monopolies, mergers and the economic regulation of utility companies, and secondly, the newly established Appeal Tribunals hear appeals against decisions of the Director General of Fair Trading and the Regulators of utilities.
With respect to ISPs, the OFT's new Markets and Policy Initiatives Unit announced in October 2001 that it would be taking a more proactive look at the ISP market as a whole, to see how the markets are working for consumers, following indications that the practices and regulation of the home PC and ISP market are creating a huge amount of public concern.

[64] Tim Richardson, 'Government announces creation of super comms regulator', *The Register* 12 December 2000, at http://www.theregister.co.uk/content/5/15417.html.
[65] Quoted from http://www.communicationswhitepaper.gov.uk/by_chapter/ex_summ/index.htm, discussion site for the Communications White Paper.

1.3 Current features and size of the market in Europe

For evaluating the opportunities and also the limitations that the Internet provides as an arena for political communication, it is necessary to know the general mechanisms and trends of the Internet market in Europe. The current section aims at describing these features, looking first (*1.3.1 – 1.3.4*) at the demand and supply sides of the European market in a comparative perspective, and in particular at Internet Service providers, Internet hosts and web sites as well as at access prices for the end user and prices for offering domains. This first part will also integrate the main findings from the country specific presentations, which follow in a second step (*1.3.5 – 1.3.11*) and present the Internet market in each of the seven selected countries.

1.3.1 Market size and structure

A precise measurement of the distribution of the Internet is not possible, because of the variable infrastructure, the usage of open standards and especially by the rapid development of nearly all technologies used to build the network.[66] The most common indicators to measure the use and the market of the Internet in a country are numbers of Internet hosts, websites by domain, Internet subscribers or users, and especially regarding e-commerce, distribution of secure servers by country and links to them.

The Western European Internet market is the second largest in the world. After a period of slow increase of Internet usage in most countries characterised by slow connections and few points of access limited to urban areas, a second phase brought about fast growth of all Internet related figures: number of users, number of ISPs, number of Websites. The breaking point was usually the entry in to force of the liberalisation legislation, and at the latest the participation of US American providers in European national markets with faster connections, more access points and above all lower access prices..

Data on the demand side of Internet services are expressed in **two different concepts**:

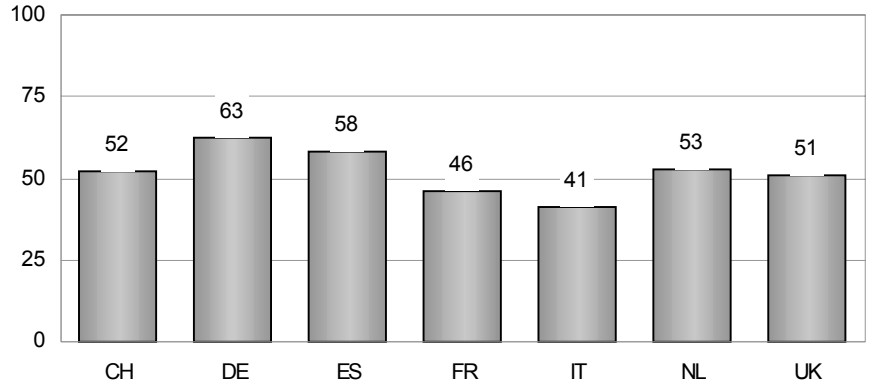
a) The number of **Internet users**, i.e. the people using the Internet independent of the place (home, work, school, public places) and mode of access (paying or free access). This number is usually measured by sample surveys such as household panels, asking people whether they use the Internet. For obtaining information on the penetration rate of a country or given social group, these absolute user numbers are put into relation to the total population (usually above 14 years). This report describes the structure of Internet users and penetration rates in *chapter 2*.

b) The other concept looks at the number of **subscribers**, i.e. the people who register with a specific provider of Internet Services. This unit is usually used to express the importance of an ISP and of the size of the paying ISP market.

[66] Kubicek (1998: 55ff).

When exploiting the user and subscriber data from Analysys (2000), one obtains a ratio of about one subscriber per two users in Western Europe (*see figure on the right*). Over the period 1997 to 2000, the average ratio in the seven countries ranged between of 41 subscribers per 100 users in Italy and 66 in Germany. The ratio fluctuates from one year to the other, and there is no clear trend in Europe. The reliability of this ratio is not very high, but it may help interpreting other data sources when both measures are not available.

Ratio of ISP subscribers per 100 Internet users (end of March 2000)



Source: Absolute data from Analysys (2000), ratio and graph by WZB
NB: The average in the 7 Europub countries is at 53 subsc. per 100 users.

In chapter 2 of this report, structural information on Internet users is presented in detail, and using different sources.

According to the data from Analysys (2000), by the end of March 2000 the Western European Internet market comprised over 80 million Internet users, with more than 41 million subscribers, thus about 4 times the size of 1997. Subscribers in the seven selected countries accounted for 82 % of this market, and Germany and the United Kingdom presented 26 and 22.2 per cent of the market respectively. The distribution by countries can be seen in the *table overleaf*. For the end of 2000, a total 140 million users were expected.

Internet subscribers 1997 to 2000
in 1000

	1997	**1998**	**1999**	**2000q1**
CH	375	575	1 000	1 200
DE	3 500	6 500	9 000	10 750
ES	650	900	1 700	2 275
FR	650	1 600	3 490	4 100
IT	534	1 142	2 900	3 800
NL	595	1 080	2 130	2 590
UK	1 100	3 750	7 400	9 175
Sub-T	7 404	15 547	27 620	33 890
Total	**9 782**	**19 755**	**34 178**	**41 300**

Source: Analysys (2000); 2000q1= end of March 2000
Sub-T = Sum of 7 Europub countries (calculated by WZB)
Total = EU-15 (excl Lux.)+ Norway +Switzerland

By early 2000, the Internet service market had firmly entered its mass-market growth phase, after two years of boosting growth. The developments with respect to amount of growth and time varied considerably from one country to the other.

1.3.2 Internet service providers in Europe

As far as the supply side of the Internet is concerned, the most important indicators for our study are those describing the Internet service providers. In addition, other indicators are used to describe the size and growth of the market, such as the number of *Internet hosts*, number of *web sites or domains*, and information on access pricing and management of domains. These will be presented in *section 1.3.3* and *1.3.4*.

With regards to Western Europe's Internet market, Analysys (2000) described the situation as "extremely diverse, in part reflecting the cultural and sectoral fragmentation of Europe's user base. Over the past five years, the number of organisations offering commercial Internet services has grown exponentially to meet the rising demand and continues to increase at an astonishing rate. By the end of 1999 there were around 4000 Internet service providers (ISPs) in operation in the region. As a result of the existence of so many operators functioning on the basis of often quite divergent business models, the structure of the Internet market is highly dynamic and is being driven through parallel cycles of fragmentation and consolidation."

Some countries know the exact number of ISPs because all types of ISPs need to register with the authority, which is the case of Switzerland, for instance. Other countries such as Germany only register ISPs with a particular set of activities and therefore ignore the number of the other types of ISPs.

In all EU countries and Switzerland, the liberalisation put an end to the legal monopoly of the respective state owned telecommunications company. In most countries, these former monopolists were the first to provide access to the Internet, and now own one of the top Internet service providers (*see the table overleaf, showing the market leader in each country*).

National leaders in dial-up access in the EUROPUB countries as of June 2000

Country	Operator / Conglomerate	Internet division	Internet subscribers (million)	National market share
Switzerland	*Swisscom /TA-Media*	Bluewin	0.65	45 %
Germany	*Deutsche Telekom*	T-Online	6.0	53 %
Spain	*Telefónica*	Terra Networks	1.0 (Spain only)	34 %
France	*France Telecom*	Wanadoo	1.4	32 %
Italy	*Telecom Italia / Olivetti*	Tin.it + Club-Net	3.1 (1.8 million for free ISP Club-Net)	41 %
Netherlands	*KPN*	Planet Internet , Het Net, XS4ALL	1.3 (total Benelux)	32 %
U. Kingdom	*Dixons*	Freeserve (free)	2.0	28 %

Source: For EU Member States: IDATE - "The World Atlas of the Internet" (08/2000 edition), for CH: EUROPUB WP4 Swiss case study; data refer to the end of 2001.

The most important features are summarised below, for a detailed description of the market please refer to the country specific sections thereafter.

Since the end of 1998, the first year of the liberalisation in Europe, and after introduction of Freeserve in the United Kingdom, the "free Internet" wave has spread throughout Europe.

According to IDATE (2000)[67], national dial-up access markets in virtually all the countries of Europe are nevertheless still dominated by the former monopolist operator, even though AOL was able to reach millions of subscribers across the continent. The impact of the unprecedented merger between the world leader in Internet services AOL and the world's traditional media and entertainment group Time Warner to the new group AOL/Time Warner is yet to be seen. Tiscali group is now the second telecommunication and Internet access provider in Europe, even though it is not the number one provider in any of the national markets.

The best Internet equipment rate in the EU is found in the Nordic countries, with almost 50 % of homes connected in Finland and 41 % in Sweden in mid-2000.[68]

Germany has the fourth largest number of Internet hosts in the world after the USA, Japan and Canada, followed by the United Kingdom, Italy and the Netherlands. Germany is also the leading Internet market in Europe. T-Online, owned by the previous monopolist Deutsche Telekom is largely in control of the dial-up access market for users from home. Today, T-Online is the leading European ISP with a presence in Austria and France (Club-Internet), and it is expected to have a total of 7 million subscribers by the end of 2000.

The United Kingdom has the most rapidly developing Internet market, and comprises about 16 million Internet users. The free ISP Freeserve, launched in September 1998 by Dixons (Britain's market leader in electrical goods retail), overtook AOL/CompuServe UK in just 3 months. In spring 2000, the UK once again was the first market to introduce a new business model that was later to spread in other European countries, i.e. flat rates for unlimited connection with local calls included (NTL, AltaVista). The first traditional operator to introduce such an offer was BT, which launched its flat rate for unlimited local calls destined for the Internet (SurfTime) on 1 June 2000.

In France, the dial-up access market was dynamised early in 1999 with the arrival of the first free ISPs. Even if the market remains under the control of France Télécom and AOL/CompuServe, free ISPs now take a place among the leaders in the residential sector; while the professional access market remains fairly fragmented.
The early success of Minitel is part of the explanation why France still lags clearly behind the European leaders such as Germany, the Netherlands and the United Kingdom in the Internet field. However, the falling costs of Internet access (as a result of the arrival of free ISPs), the introduction of flat rates including telephone calls and the arrival of flat rates for unlimited connection with local calls included can be expected to boost the growth of the Internet in this country.

In Spain, the traditional national operator Telefónica has used its proprietary online service, InfoVia, to develop the Internet within the country and to export the model to South America. The residential Internet market in Spain is currently controlled by operators such as Telefónica and its subsidiary, Terra Networks, Retevision and Uni2.

Telecom Italia, the traditional national operator now controlled by the Olivetti group, has also become very active the competitive Internet market. Olivetti currently controls close on 40 % of the residential Internet sector. Free Internet arrived in Italy in March 1999 and like elsewhere, became a success. It was operated by Tiscali, which now holds 20 % of the dial-up access market.

[67] Http://www.isp-planet.com/research/index.html.
[68] IDATE (2000).

The most recent trend is high-speed Internet access, which has made an initial breakthrough in the European market with cable and ADSL. In countries with a high cable penetration rate such as the Benelux region, the number of high-speed Internet subscribers is displaying steady growth. To be noted in this context is the arrival of the first pan-European player in Internet access via cable announced in July 2000 and born out of the merger of UPC Chello and Excite@Home (outside the USA): Excite Chello (with 300 000 subscribers at launch date, active in Western and Eastern Europe).[69]
ADSL is continuing to be deployed in Europe through traditional operators. Although ADSL access is at present most frequently confined to the major urban centres, it will be available in most of the medium-sized towns in the major European countries by 2002.

A significant trend is that the main national players in Europe have started entering the other national markets, as can be seen in the country sections, and this usually by concentration.
Another important feature is the trend to full service providers in some countries such as Switzerland, where important ISPs linked themselves to other sectors. This goes along with a trend to mobile phone use for Internet access.

To sum up, it can be said that at the turn of the millennium, the Internet service provider market was particularly concentrated in Germany, Switzerland and Italy, where the market leader alone held 53, 45 and 41 per cent of the national market, respectively, and where one or two other big players held further large parts of the market (the three leading Swiss ISPs for instance grouped 95 % of access customers).

In turn, the British market was the most decentralised and competitive among the seven countries, considering that the three leading market players together only reached 53 per cent of the ISP market share. The French, Dutch and Spanish markets were also characterised by a comparatively high number of ISPs with important market shares. However, acquisitions and mergers in this sector are occurring at such a pace, and in particular smaller ISPs being bought by the big players, that the market structure is constantly changing. For instance, each of the three leading ISPs in the Netherlands has a relatively low market share, but since they are all daughters of KPN, this group's share is considerable.

For an in-depth presentation of the national Internet markets, please refer to the country specific *sections 1.3.5 – 1.3.11*.

[69] IDATE (2000).

1.3.3 Internet hosts, domain name registrations and pricing

According to the OECD definition, **Internet hosts** are domain names that have an IP address "record" associated with them, and include any computer system connected to the Internet (via full- or part-time, direct or dial-up connections). This number of hosts[70] can be regarded as an indicator for the minimum size of the Internet. In October 2000, about 70 % of the 90 million Internet hosts in the OECD area (which represented about 96 % of the world total) were held by the United States, followed by Japan and Canada. With a total of 14 million hosts, the EU Member States together held more than a quarter of the OECD hosts, out of which 79 % were located in the seven Europub countries. Only in the Netherlands, the ratio of hosts per thousand inhabitants reached that of the OECD average (82), while the EU and Europub average ratio was around 37 and 38 respectively (*see table on the left*) and that of Spain as low as 16 hosts per 1 000 inhabitants.

Internet hosts in Oct 2000

	Total no. in 1 000	Per 1 000 inhabitants
CH	453	64
DE	2 600	32
ES	620	16
FR	1 134	19
IT	1 861	33
NL	1 290	82
UK	3 124	53
Sub-T	11 083	35
EU-15	**14 0517**	**37**
OECD	90 438	82

Source: OECD Communications Outlook (2001: 112).
Sub-T = Sum of 7 Europub countries (calculated by WZB).

Another indicator for the Internet market is the number of **web sites**. As it concerns the web contents, it is of particular interest for our study on political communication in the Internet. The total number of web sites in the world has boosted up in the end of the nineteen nineties to about 18 million in July 2000.[71] Within the country code top level domains (TLD), **.de** (Germany) hosted the largest number of Web sites with 1.6 million sites (since the United States use more generic TLD such as .gov, .edu etc.), corresponding also to the highest ratio of sites per 1 000 inhabitants (almost 20). As for most other Internet related figures, the UK, Switzerland and the Netherlands also take a leading position in web sites offered in relation to population size. The offer in Spain and France was clearly below the OECD average.

However it should be noted that these total numbers include all types of content, and thus to a large extent commercial content. In addition, there is an alternative counting method which breaks down the web sites on generic TLD (.com, . net, .org etc) by host country, using IP information. This method shows better the leading position of the United States, but largely confirms the strong presence of Germany in the web offer.

Web sites by country code top level domain in Jul 2000

	Total no. in million	Per 1 000 inhabitants
.CH	110	15.4
.DE	1 607	19.6
.ES	25	0.6
.FR	63	1.1
.IT	180	3.2
.NL	253	16.1
.UK	937	15.8
EU-15	**3 441**	**9.2**
OECD	4 330	3.9

Source: OECD Communications Outlook (2001: 113). Figures are rounded.
EU-15 = Sum of ccTLD of the 15 EU Member States.

For the content aspect of Internet communication, it is also important to know that the rules and prices for registering and operating second-level or third-level domain names (e.g.

[70] All data on number of hosts are from OECD Communications Outlook (2001: 100,112), based on Telecordia technologies, and include adjusted generic TLD.
[71] OECD Communications Outlook (2001), based on netcraft data (http://www.netcraft.com).

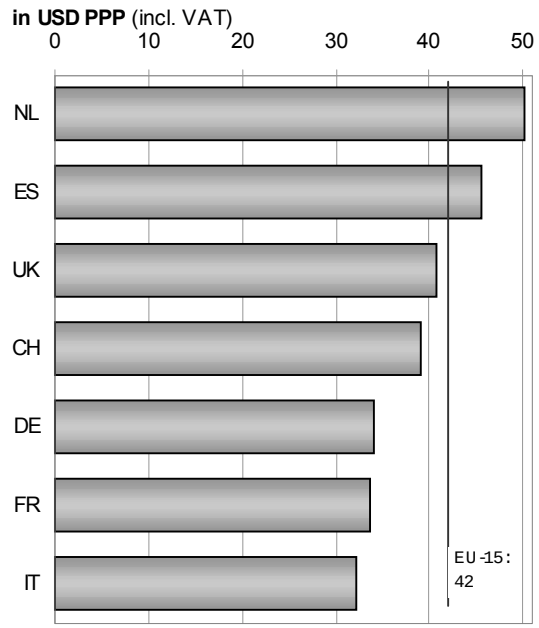
oecd.org or telecom.co.nz) vary from one country to the other. While most country code TLD registries continue to operate as monopolies, generic TLD can now be registered at a growing number of registries around the world. Individual registrations are accepted by a majority of the registries, but some either encourage (through pricing) or will only accept registrations by resellers. (OECD Communications Outlook 2001). The development in this field could have an impact on political actors opportunities to use the Internet as a means of communication.

1.3.4 Internet access prices

Besides technical infrastructure for access (either at home, at the work place or in public places), the prices for connection are certainly one of the determining factors for wide spread of Internet use.
Deregulated competition on the ISP markets in Europe has effectively led to a sharp decrease of access prices. The most significant drop occurred with the introduction of free-access models, which was first introduced in the UK and then spread to the other countries at various moments. For the average in the European Union and in the OECD countries in general, the crucial decrease of access prices was witnessed in the year 2000. In Germany and the Netherlands, this step had already been made one year earlier.

As the pricing schemes of ISPs are already highly complex and fast changing within one country, cross-border comparisons are even more difficult. The OECD has built several indicators to compare prices internationally, among which the 20 hour Internet access basket (*see figure and table overleaf*). From these figures it appears that at peak times, access prices had been highest in France, United Kingdom and Germany in 1998 and within two years dropped below the level in the Netherlands and Spain (the only country where ISPs shortly raised the prices from 1998 to 1999). These were the only countries above the OECD average. Italian users enjoyed the lowest access prices between 1998 and 2000.

Prices for 20 hour access basket connection in Sep. 2000



Source: Data from OECD (2001), graph: WZB
PPP: purchasing power parities

OECD Internet access basket for 20 hours using discounted PSTN rates
in USD PPP, including VAT, 1998-2000

	1998		1999		Sep 2000		Change (%) 1998-2000	
	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak
EU	**64.0**	**46.0**	**59.4**	**41.3**	**42.0**	**32.0**	**-34**	**-30**
FR	72.1	48.3	60.6	38.2	33.7	33.7	-53	-30
UK	70.0	46.2	60.6	32.4	40.8	26.6	-42	-42
DE	68.4	68.4	46.2	46.2	34.1	34.1	-50	-50
CH	67.0	67.0	54.1	31.5	39.1	29.7	-42	-56
NL	62.8	40.2	51.1	33.4	50.1	35.5	-20	-12
ES	42.1	42.1	50.7	50.7	45.5	28.3	8	-33
IT	42.3	35.6	41.4	29.5	32.2	26.4	-24	-26
OECD	58.1	46.6	58.8	43.8	44.1	34.2	-24	-27

Source: OECD (2001: 193), rounded by one decimal.

Similar results were published by IDATE in July 2000, in a comparison of the cost of dial-up access for residential users for 12 hours of PSTN connection per month in $ (not PPP adjusted). Among the seven countries selected in the present report, Switzerland had the lowest cost, followed by Italy, France and Spain; the highest cost was found in Germany, closely followed by the Netherlands, and the United Kingdom. The absolute cost for the 12 hour connection (made up by local communication rates only, as free access was offered), was around 10 US dollar in Germany and the Netherlands, and clearly below in the other countries. The relative position of Germany however is different from that in the OECD survey.

1.3.5 Switzerland

Most ISPs operate on a local or regional level only. The important ISPs, for their part, all have lost their independence during the last years and linked themselves to other business sectors[72]. This process of consolidation is expected to go even further. For example, a trend towards full service providers (fixed network and mobile telephony, Internet access, as well as content provision) can already be discerned[73].

[72] Schweizerische Depeschenagentur (2000). „Schweizer ISP-Markt konsolidiert". *Neue Zürcher Zeitung* of 15 January 2000, p. 25.
[73] ISCG (2001:16 EN).

Top Internet Service Provider in Switzerland			
ISP	**Use**	**Subsidiary / Share**	**Country**
bluewin	45 %	Swisscom, TA-Media	CH
freesurf	36 %	TDC Switzerland AG (79 % held by TeleDanmark)	DK maj., CH
SwissOnline	14 %	Cablecom (held by NTL Inc. New York)	USA
Datacomm	3 %	Tiscali	IT
Source: EUROPUB WP4 Swiss Case Study (Use refers to access customers per month, share estimated), data at the end of 2001.			

Bluewin[74], launched in 1996 by the former monopolist Telecom PTT, remains the market's leading ISP after the liberalisation with more than 650 000 active access-customers per month (about 45 % market share). Moreover, bluewin is the only important ISP to be still in the hands of national firms. In 1998, bluewin was integrated into Swisscom, the leading telecommunications company, whose majority shareholding still belongs to the Confederation. Since April 2000, TA-Media holds an 8 % stake in bluewin, which became a profit centre of Swisscom Fixnet in October 2001 (92 % stake). TA-Media is a leading Swiss media group whose business encompasses print media (e.g. Tages-Anzeiger, SonntagsZeitung, Facts) as well as electronic media like television (TeleZüri), radio (Radio Zürisee) and Internet (Winner-Gruppe)[75]. Thanks to this wide range of products, TA-Media can provide bluewin with new contents. Swisscom Fixnet, on the other hand, cooperates with bluewin in order to develop their broadband networks and accordingly to strengthen their position in this up-coming market. Thus, these strategic alliances not only allow bluewin to diversify its field of activities, but to consolidate its market position at the same time.

The second largest ISP in Switzerland, **freesurf** (about 525 000 active access-customers per month), originated from the merger of the two telecommunications providers (fixed network and mobile telephony) sunrise and diax holding to TDC Switzerland AG in November 2000. Founded in 1996 by the 6 biggest Swiss electric power companies, diax holding acquired the Swiss ISP Internet Access in 1998. Sunrise, which had alliances with the UBS, BT (British Telecommunications plc), TeleDanmark and the Swiss Federal Railways, purchased in the same year the ISP Plusnet AG. In the newly founded company, named TDC Switzerland AG, TeleDanmark holds a majority stake with almost 79 %[76].

SwissOnline[77], another important ISP with about 200 000 access-customers per month, has belonged since 1998 to the country's largest cable operator Cablecom (penetration rate of 91 %)[78]. Cablecom not only covers more than half the Swiss cable television market with its own services, but also delivers signals via its national fibre backbone to other cable operators. Cablecom Engineering, a subsidiary of Cablecom, constructed this national fibre backbone. Additionally, the company owns the Rediffusion AG, which runs over 40 specialist shops for consumer electronics, radio, TV, video and PCs. In March 2000 NTL Inc. New York purchased the Cablecom Group in order to roll out broadband across Switzerland. In Europe, NTL is currently operating in the UK, Ireland, France, Germany and Sweden[79].

In addition to these 3, **Datacomm** is of some importance with about 50 000 access-customers by the end of 1999, and was purchased by the Italian Tiscali in January 2000[80].

[74] Http://www.bluewinag.ch
[75] Http://www.tamedia.ch
[76] Http://www.sunrise.net/company/com_his.htm
[77] Http://www.swissonline.ch
[78] Http://www.cablecom.ch/de/aboucc.html
[79] Http://www.ntl.com/locales/europe/en
[80] ai (2000). „Italiens Tiscali fasst in der Schweiz Fuss: Erwerb der Mehrheit am Internet-Service-Provider Datacomm". *Neue Zürcher Zeitung* of 15 January 2000, p. 25.

As the history of the three biggest Swiss providers suggests, ISPs need to diversify and concentrate on a wider range of telecommunications services in order to hold on to their market share. This happens mostly through trans-national alliances.

Swiss providers carried out a survey among their users for the year 2000; however, the results cannot be considered as representative, as only 5 questions were asked to ca. 230 participants, and only free of charge providers were taken into account. According to press information available at http://www.providerliste.ch, 35 % of users connect through freesurf, 13 % through Bluewin, 11 % through Datacomm, and 7 % through SwissOnline. Even if these user data do not correspond to those of the report, they confirm that the four providers freesurf, Bluewin, Datacomm and SwissOnline are the most important and widely used ISPs in Switzerland.

1.3.6 Germany

With about 6.5 million subscribers **T-Online** is not only the leading ISP in Germany but also in Europe. T-Online is the online service of the Deutsche Telekom AG, the largest telecommunications network operator in Germany. T-Online has a market share of 50 per cent in Germany and about 37 per cent in Europe. 90 per cent of the turnover is made in Germany and 10 per cent in Austria and France. Expansion in 2000 brought T-Online into France (Club Internet), Spain (Ya.com), Portugal (Terravista) and Austria (T-Online.at). Since April 2000 T-Online is a joint-stock company.[81]

The second largest provider in Germany is US media giant AOL Time Warner with **AOL Germany**. AOL Time Warner is the world's largest Internet and media company and has about 25 million subscribers worldwide. AOL Germany is a part of the subsidiary AOL Europe. In 2001 AOL bought the 49.5 stake of AOL Europe from the German Bertelsmann company. Since 1997 the third largest ISP in Germany, Compuserve, is also owned by AOL.
Statements concerning the number of Internet service providers (ISPs) in Germany differ between 450 and 1250.[82] In Germany ISPs only need to notify the authority if they are also offering telecommunication services. For that reason, as an example, the large number of local ISPs is not counted. In addition there are no relevant official registrations of ISPs: neither by the Regulatory Authority for Telecommunication and Posts (Reg TP) nor by the Federal Statistical Office. One of the rare empirical surveys, conducted by the European Business School in Oestrich-Winkel (2000), assumes that there are about 2100 ISPs operating in Germany.[83]

While the Reg TP data only show the online-providers with the largest number of subscribers, the GfK-Monitor 7th wave provides an overview over the largest providers which are used in Germany to access the Internet and not only the usage of the Internet per subscriber.[84] According to the results the two largest providers are also T-Online used by about 59 per cent of all users (14.2 million) and AOL with a stake of 36 per cent (8.7 million users) in the beginning of 2001. However the third often used ISP is Freenet, owned by the German Mobilcom company.

[81] Http://germany.internet.com/.
[82] Elixmann / Metzler (2001: 35).
[83] European Business School (2000).
[84] GfK (2001).

Top Internet Service Provider in Germany			
ISP	**Use**	**Subsidiary / Share**	**Country**
T-Online	59 %	Deutsche Telekom AG	DE
AOL	36 %	AOL Time Warner Inc.	USA
Freenet (Mobilcom)	15 %	Mobilcom	DE
Yahoo Online	13 %	Yahoo Inc.	USA
MSN	8 %	Microsoft	USA
Comundo	7 %	TerraLycos	USA
Planet Interkom/Viag	6 %	British Telecom	UK
Arcor	6 %	Vodafone	UK
Compuserve	6 %	AOL Time Warner Inc.	USA
Source: GfK-Monitor 7th wave / Elixmann/Metzler (2001: 81f)			

Although the Regulatory Authority Reg TP does not register the number of ISPs, it offers the number of subscriber of the largest ISPs. According to the annual report 2000 the three largest ISPs together had some 9.3 million subscribers at the end of the year 2000. The largest one was T-Online with 6.5 million users, followed by AOL with 2.6 million and Compuserve with 0.2 million subscribers.[85]

The growth in the number of subscribers between 1997 and 2000 is due not least to the fall in prices. In the case of Germany, the Internet began to become accessible for the broader public by the market entrance of the world largest online provider America Online (AOL) in 1995. Within one year the Internet lost its status as a peripheral medium and developed more or less into a mass medium.[86] Despite AOL's leading role in mass diffusion of the Internet, today the German company T-Online has the biggest customer base. A development which can be observed in several European countries in regard of the historical telecommunications operators. However, the American ISPs still have a strong presence in the German Internet market.[87]

1.3.7 Spain

In Spain, the number of Internet users was estimated at 5 486 000 in the year 2000, and the total number of Internet service providers in Spain was estimated to exceed 3000 ISPs. There are hundreds of Internet *access* providers in Spain. These companies rent parts of the telecommunications network from Telefónica, the main Spanish Telekom, or in a very small number of cases from British Telecom, which is trying to get into the Spanish market. Notwithstanding the great degree of competition in the market of Internet access providers, this market is dominated by just a few companies. Most of these are Spanish companies, although as in the case of Terra, some of the partners may be foreign. The main Internet access provider, Terra, captures 43 % of the market. This company merged with Lycos and has signed partnerships with Bell Canada, Bertelsmann AG, Mirae Corporation, Singapore Telekom, Telefónica Móviles, BBVA, Amadeus, and Telepizza. Some of these companies are Spanish – e.g. Telefónica Móviles, BBVA, Telepizza – whereas others are foreign – eg. Bell Canada, Bertelsmann.

[85] Regulierungsbehörde für Telekommunikation und Post (2001)
[86] Rederer (2000: 32f).
[87] ESIS (2000: 49).

Top Internet Service Provider in Spain				
ISP	**Users**	**Share**	**Subsidiary / Share**	**Country**
Terra	1 692 000	43.4 %	Terra/Lycos et al	multinational
Eresmas	681 000	17.5 %		ES
Wanadoo	346 000	8.9 %	France Telecom	FR
Jazzfree	171 000	4.4 %		ES
Navegalia	170 000	4.4 %		ES
Arrakis	113 000	2.9 %		ES
Euskaltel	108 000	2.8 %		ES
Other	938 000	24.1 %		.
Source: EUROPUB WP4 Spanish case report, data refer to Feb/Mar 2001 Note: Users can use more than one provider. The percentages reflect the percentage of the population over 14 years old who uses a particular provider				

On 23 June 2000, the government approved a Decree that determined urgent measures in the telecommunications sector. This Royal decree established that dominant telecom companies would have to determine before 1 November 2000, two new metropolitan rates for telephone conversations and an Internet access rate. On 3 June 1999, the Spanish Telekom (Telefónica de España, Sociedad Anónima Unipersonal) had been declared as the only dominant company.
According to a government order of 31 October 2000 confirming the Internet access rates set by Telefónica, subscription and cancellation of Internet service are to be free and a monthly rate of 16.5 Euro is to be applied.

1.3.8 France

The French Internet market appears rather **decentralized** since one can find 9 different providers proposing subscriptions, 11 proposing 'free' access, and 6 regional providers.
On the emerging market of the high-speed Internet 6 companies offer this service: 9online, Club-Internet, Mangoosta, Infonie, LibertySurf and Wanadoo (which is said to gather 90 % of the customers in this sector).
Another sign of openness of the French market is that most of the companies offering access are owned by foreign groups. Yet, the main actor remains a publicly owned one, **Wanadoo**/France Telecom, which is the leader in the sector. Its competitors accuse France Telecom of benefiting from its ambivalent position: it is both an access provider and the company who owns the telecommunication networks which means that any provider has to contract (pay) with France-Telecom to have access to the telephone network.

The structure of the market by **type of access** according to the study Médiamétrie-ISL of 2000[88] is: Free access: 34.4 %, paying the exact time spent connected: 2.9 %, regular subscription/limited hours: 15.6 %, and regular subscription/unlimited connection[89]: 60.8 %. (Users can use several providers, therefore the total is not 100 %.)

As in all countries, information on market share varies considerably with the source used, and the fast pace of acquisitions in the Internet market leads in addition to constantly changing market situation. A company that is one of the main actors in 2000 might have disappeared in 2001 or become part of a larger group. Besides the discrepancies deriving from change over

[88] Médiamétrie-ISL, March 2000 at http://www.mediametrie.fr/web/index.html.
[89] This does not mean that users don't pay for extra hours. They subscribe for 10,20,30 hours and pay a fixed price for any extra hour.

time, there are also considerable differences depending on the method used, i.e. subscriber data vs user survey. The two tables below show clearly these differences.[90]

Top Internet Service Provider in France, by number of users			
ISP	**No of users**	**Subsidiary / Share**	**Country**
Wanadoo	2 568 000	France telecom (72.2 %), Dixons (12.4 %)	FR
Libertysurf, Freesbee, WorldOnLine, Infonie	1 150 000	Tiscali Group	IT
Free	1 000 000	Free (Proxad society) and Iliad	FR
AOL France	900 000	AOL and Bertelsmann (European joint-venture, since 2000)	USA/DE
Mageos	750 000	9 telecom (private telephone company) owned by Telecom Italia (97.22 %)	IT
Club-Internet	700 000	T-Online	DE
M6net	600 000	:	:
Oreka	500 000	:	:
Freesurf	500 000	:	:
Source*:* Number of users: *JDNET, November 2001: http://www.journaldunet.com/chiffres-cles.shtml*			

According to the IDC study of 2000[91], the four main actors in the access sector are: France-Télécom, Groupe Cégétel, Club-Internet and Liberty Surf. They represent 55 % of the market of those who have access to the Internet and 70 % of the professional market. But France-Télécom is still far ahead as it reaches 43 % of market shares.
The fast growing sector is the 'free access' one: these companies gathered 3.7 millions of users (with half of them being regular ones).

Top Internet Provider in France, by main Internet access service used			
ISP	**Use**	**Subsidiary / Share**	**Country**
Wanadoo	39 %	France telecom (72.2 %), Dixons (12.4 %)	FR
Infonie, LibertySurf (Worldonline, Freesbee)	9 %	Tiscali Group	IT
Free	12 %	Free (Proxad society) and Iliad	FR
AOL France	16 %	AOL and Bertelsmann (European joint-venture, since 2000)	USA/DE
Club-Internet	6.5 %	T-Online	DE
Others	17.5 %	.	.
Source: JDNET, November 2001. Users may have several subscriptions.			

As these figures clearly show, even if the actors are numerous, privately owned and, for most of them, owned by foreign groups, the dominant actor remains France Télécom with almost 40 % of the total number of users.

[90] Data about ISP in France were collected from the website http://lesproviders.com that compiles this kind of information (but with no reference to the last update) and, for cross-checking, from websites of each company. Most of the data seem to be rather recent but have no precise date of last updating for each entry. The most important ISP appear to be Wanadoo, AOL, Tiscali, and Club-Internet, and market shares data are the most recent available (2001). As Internet is a medium without memory, it is rather difficult to find older data on these specific points (most of the time they concern the number of people connected).

[91] IDC of May 2000, at http://www.idc.fr/.

The public phone company is accused by its competitors to benefit from its position of owner of the network. During the discussion over the price for unlimited connection time, the *Association française des fournisseurs d'accès* (French association of access providers), protested against the *Autorité de régulation des Télécommunications* (Telecommunications Regulation Authority) because the price decided - which France Télécom asked for the use of its network - appeared too high (45 euro). It was exactly the price for an ADSL connection (an area in which France-Telecom is the unchallenged leader with 90 % of the market shares). Moreover, France Télécom has tried to protect an activity, the Minitel, which competed with the Internet and was a huge source of profit for the public company.[92] The success of the Minitel and its profit-making nature for France Télécom has probably slowed down the development of Internet in France.

1.3.9 Italy

Italy represents a unique case in the EU context for its technological asset. The incumbent (Telecom Italia, main telecommunication company in Italy) provided its services through a peculiar technology based on copper.
When the Italian government decided to spread broadband technology in order to grant a faster and better access to the Internet, Telecom tried to build a different technological infrastructure, but finally adopted the existing infrastructure previously developed.
After the liberalisation of the Italian telecommunication market Telecom Italia brought forward the "Socrate (Sviluppo Ottico Coassiale Rete di Accesso Telecom) plan"[93]. This project was meant to build a new technological infrastructure to provide services through broadband technology, using optical fibres.
After the partial implementation of the plan, Telecom stopped the project because a more economic technology emerged: technology based on ADSL (Asynchronous Digital Subscriber Line). ADSL technology can work on copper existing infrastructure, avoiding additional charges.
In addition, we have to consider that, unlike other European states, Italy has not developed cave-television infrastructure which has been used in other countries to favour broadband diffusion.
Real alternatives to the technological infrastructure of the dominant operator have not been developed yet. As indicated, the Internet market currently based its growth on the ADSL technology. This technology allows the transport of the data and telephone signal on the already existing network, avoiding the creation of a new expensive network. Nevertheless the most diffused method used by residential consumers to access the Internet consists of "dial-up" connection provided by the existing infrastructure and based on a system of tariffs proportional to the length of the connection (generally urban).

The introduction of Freenet in Italy in 1999 represented a turning point in Italian users' access to the Internet, Internet has had an unexpected growth since then. In Italy the model has been launched by Tiscali, soon followed by other providers (Infostrada and Telecom Italia).

[92] The Minitel was a French network of communication, parallel and competing with the kind of possibilities offered by the Internet. Through a small computer, users could have access to services from companies and would pay to France Télécom for the exact time they spent online (from few cents of euro to almost one euro per minute). Very slow and expensive it could not compete with the possibilities of Internet but it remains very widespread and used. For example, 40 % of Degriftour (an online discount travel company) activity was still made through Minitel in 2000.

[93] The "Socrate plan" was effective between 1994 and 1998. In this period Telecom Italia realised a network based on optical fibres which involves almost 2 millions of buildings.

1999 was the year of the explosion of the residential use of the Internet, but 2000 characterized itself for the emergence of unexpected elements of crisis. In 2000 the local loop unbundling was implemented, allowing the "liberalisation of the last mile" of the network and giving the possibility to new operators to offer the whole range of Internet services without possessing an own technological infrastructure. The law 66/2001 aimed at regulating the phase of transition from analog to digital technology and it indicated 2006 as final dead-line for the abandonment of analog technology.

Top Internet Service Provider in Italy			
ISP	**Reach**	**Subsidiary / Share**	**Country**
Libero-Infostrada	24.2 %		
Tiscalinet	11.5 %		IT
Tin.it	11.2 %		IT
Wind	7.9 %		
Msn-hotmail	6.7 %		USA
Yahoo-Italia	5.6 %		USA
Kataweb	3.1 %		
Virgilio	3.0 %		
Italia-On-Line (IOL)	1.9 %		
Others	24.9 %		
Source: Panel e-search[94]. Data refer to September 2001.			

1.3.10 Netherlands

There is no recent secondary material on Internet service providers in the Netherlands. Primary material on absolute numbers and market shares is difficult to find and, if available, for sale only. The Dutch organisation for Internet Providers NLIP (Branchevereniging van Nederlandse Internet Providers)[95], represents 55 official members but does not possess an overview of figures of its members. It assumes that there are about 120 ISP's in the Netherlands.

Top Internet Service Provider in the Netherlands			
ISP	**Use**	**Subsidiary / Share**	**Country**
Het Net	16 %	KPN daughter	NL
Planet	14 %	KPN daughter	NL
XS4all	2 %	KPN daughter	NL
12 Move	7 %	Tiscali	IT
Worldonline	5 %	Tiscali	IT
Zon	5 %	Versatel	
Freeler	5 %	ING	NL
Chello	5 %	UPC	
Wanadoo	3 %	France Telecom	FR
Source: European Internet Barometer August 2001			

According to a private study, the biggest ISP market share was in April 2000 in the hands of three daughters of KPN, the former Dutch state telecom company, Het Net (16 per cent), Planet (14 per cent) and XS4all (2 per cent). Other large players are 12 Move (7 per cent) and Worldonline (5 per cent) of Tiscali, Zon (5 per cent) of Versatel, Freeler (5 per cent) of ING,

[94] Http://212.102.32.203/intranet/ESEARCH/Prodotti/comunicato-provider.pdf.
[95] Http://www.nlip.nl/.

Chello (5 per cent) of UPC and Wanadoo (3 per cent).[96] In 2001, there were 18 providers that offered Internet services for free in the Netherlands, of which one demands a small registration fee. 19 providers offer Internet by cable.[97] Planet Internet announced at the beginning of 2002, to raise its prices for an ADSL subscription by ten per cent. KPN had announced earlier to raise prices by almost 25 per cent. Both market players stated that the price raise was necessary to safeguard quality and service.[98] In general most ISP's provide either smallband or broadband connections. Only some ISP's (like for example Wanadoo and Kabelfoon) provide both. Most market players expect that free Internet subscriptions by smallband will disappear as too little money is being earned of usage of the telephone line only. In due time, the smallband point casting is supposed to be fully replaced by broadband connections. Development of xDSL lines is supposed to be dependent on the supply of other types of broadband connections. In the mean time it is expected that customers will have to pay according to the quality and capacity of the line they desire. Internet connection by cable is so far much cheaper than a xDSL connection. The latter possibility is for the moment limited to the Western part of the country and the bigger cities.[99]

1.3.11 United Kingdom

Oftel, the UK regulator for the telecommunications industry, claimed in April 2000 that there are currently about 400 **Internet service providers offering access** to British users. However, this figure includes many "virtual ISPs", which are only branded "interfaces" supported by the services of established ISPs, rather than ISPs in their own right. Many of the ISPs offer 'free' or subscription-free access to a number of well-established portal sites and open access to a wide range of Internet content and e-commerce sites.

The ISP end of the Internet access market in the UK is extremely competitive and expanded rapidly in 1999/2000. This expansion has driven significant changes in Internet access with the rise of a new generation of 'consumer-focused' ISPs offering increased choice for consumers. Oftel claims that the 'best known of these consumer ISPs and currently the largest in the UK is Freeserve, which popularised subscription-free access in 1998'. Many other ISPs have since pursued a similar pricing model.

Internet service provision has taken on a more flexible structure in recent years, with unlimited access now available in return for a flat fee per month. This has brought the cost of being online down substantially, and has made a range of packages available to suit the differing needs of light and heavy users. Access is now possible via a wide range of technologies other than the PC, although the PC remains by far the most common form of access. This means that mobile telephone network operators such as Vodafone are now also ISPs to users of their WAP services, and the same applies to digital TV providers such as Sky who offer access to the Internet via TV.

Media Guardian claims that the majority of home Internet users still surf from within a **portal** or ISP. Four companies dominate their navigation - Microsoft, Yahoo, AOL and Lycos. 'Microsoft's MSN takes first and second place in the table of top portals, with almost 6m

[96] European Internet Barometer August 2001.
[97] Net Magazine, at http://www.net-magazine.nl/.
[98] 'Planet Internet verhoogt eigen tarief ADSL', http://www.webwereld.nl/, 5.3.2002.
[99] OPTA, 'consultatie document Internet toegang', 20.3.2001.

unique users in the UK. Trailing behind is Yahoo with 4m users, AOL with around 1.7m and Lycos with around 1.5m.'

Just one of the four major ISPs operating in the UK (BT) is a UK national company. All of the major ISPs are involved heavily in other media and telecommunications sectors in addition to providing Internet services; two of the major ISPs are FTSE 100 companies. In November 2000, the main features were:

- Freeserve had maintained its dominance in the UK market as of November 2000, with its share of home usage tracking the market at 29 %, compared with 28 % in August 2000[100]. However its growth was less than expected and it faced increasing competition from AOL and BT Internet.
- The share of paid-fors (mainly AOL and BT Internet) rose from 23 % to 27 % in Q4 2000, which suggests that the paid-for market was expanding with roll-outs of unmetered access and broadband.
- NTL's subscriber base has increased by around 650,000 since August 2000 while its market share has risen by 1 % to 9 %. Its share was forecast by Enders Analysis to advance to 12 % during 2001.
- Consolidation in the UK market seems likely to occur principally through a withering of secondary ISPs, as unmetered users drop secondary accounts. This trend is already apparent with the levelling-off of the number of ISPs per household.

Top Internet Service Provider in the UK			
ISP	**Use**	**Subsidiary / Share**	**Country**
Freeserve	19 %	France Telecom's ISP Wanadoo in December 2000	FR
BT	18 %	UK subsidiary of BT Group plc	UK
AOL	16 %	Part of multimedia giant company AOL Time Warner	USA
ntl	9 %	Holding company for NTL Incorporated	USA
LineOne	4 %	:	:
Virgin Net	3 %	:	:
MSN	2 %	:	USA:
Supanet	2 %	:	:
Netscape	2 %	:	USA
Others	25 %	:	:
Source: Oftel [101] ISP market shares (rather than usage), Aug 2001			

In respect of **access pricing**, the developments up to July 2001 can be summarised as follows: According to data from Enders Analysis[102], use of unmetered packages continues to grow strongly. As of November 2000, a third of UK homes claimed to have unmetered access. As access times have risen, unmetered access packages have increased their market share mainly

[100] Data for Nov 2000 detailed in April 2001 report from Enders Analysis, at http://www.endersanalysis.com/reports/ukisps_0401.htm

[101] Given that the source of these statistics is the telecommunications watchdog Oftel, they are likely to be reliable. However, varying claims exist as to the market shares of UK Internet service providers; for example, The Guardian claimed in October 2001 that 'AOL remains the number one choice, closely followed by Freeserve'. Whatever the market share hierarchy, though, it is clear that the dominant ISPs in the UK are Freeserve, AOL, BT and ntl, since all other ISPs have 4 % or less share in the market. ('Web crawl', article in Media Guardian, Friday 5 October 2001.)

[102] Http://www.endersanalysis.com/reports/internetaccess.htm.

at the cost of 'free' (local call charges only) services. Unmetered access (subscription-only) packages more than doubled market share to 35 % of the online population in February 2001, compared to May 2000. Subscription (plus local calls) packages have maintained market share at 20 %, while 'free' (calls-only) packages have declined from 66 % market share to 45 %. After a dip in 2000, subscription packages have the same market share as in early 1998.

The migration of access from 'free' services (local call) to subscriber packages, in particular unmetered, has raised the market share of the leading unmetered access providers, AOL, BT Internet and NTL, which together have increased their share to 16 % overall. Freeserve, the leading 'free' service provider, continues to dominate the market, although its share has declined from 29 % to 21 % between Q2 2000 and Q1 2001. Due to the fast rising market for Internet services, Freeserve has still seen subscriber numbers rise. However, AOL, BTInternet and NTL are recruiting a disproportionately high number of first-time subscribers.

As regards access by businesses, business use is gradually migrating from dial-up connections to higher quality access technologies - 46 % use dial-up connections, 32 % use ISDN lines and 8 % use broadband connections.

The major issue in the UK in 2001 was the rollout of broadband Internet access. UK telecoms regulator Oftel conducted its quarterly residential consumer survey in November 2001, and found that while 39 % of homes connected to the Internet were currently using unmetered packages, just 2 % of 'Internet homes' were using broadband. Just over half (55 %) of narrowband users expressed interest in upgrading to broadband access[103].

[103] ISP Review, at http://www.ispreview.co.uk/ispnews/comments/1012298115,45103,.shtml

1.4 E-government and online administration

1.4.1 Overview

The term e-government (electronic government) describes in a broad sense the use of new information and communication technologies to support the work of governments and public administrations. Usually there are three main effects expected:

- better and more efficient services to business and to citizens
- greater efficiency and openness of government administration
- cost savings for the taxpayer

E-voting is sometimes considered as a form of e-government, but this report presents e-voting projects in a separate section on e-democracy.

Initiatives for establishing and promoting electronic government were adopted by all governments of the seven selected countries, in some cases as a priority action and with considerable deployment of resources. Some countries worked with target dates for achieving government online, the UK and Germany for instance plan to make all (appropriate) government services available online by 2005.

The basis for all e-government strategies is to provide *information* to citizens, but most strategies go beyond this and aim at providing also *communication* (via e-mail, discussion forums, sometimes call-centres) and *transaction*. Transactions in the frame of e-government are for instance payments for public services or returning forms to the administration. While they offer citizens access to administration at lower cost (in terms of flexible opening hours, reduced transport and waiting time), they depend on the confidence in safe transmission and authentication technology.

The European Union institutions developed their own strategies for e-government, of course with a reduced scope compared to those of national governments, since there are fewer direct contacts between citizens and administration (as for instance through local public service or taxation on income at national level).
The targets of these strategies were set out in the e-Europe programme, and the concrete Internet strategy of the institutions are described in *section 3.2* of this report.

1.4.2 Switzerland

E-government, one of the key areas for action in the Swiss Information Society Project, is guided by the three principles information, communication and transaction. It encompasses a wide variety of projects looking at the Internet as an arena for political participation and communication, with the two core projects *guichet virtuel* and *e-voting*[104].

After the Federal Chancellery initiated expert work on the ***guichet virtuel*** in summer 2000, the Confederation agreed in early 2001 with all the cantons and communes on a framework for joint implementation of a pilot scheme. This pilot project should start with a limited range of topics in the first half of the year.[105] Moreover, it is planned to make access to the *guichet virtuel* available at post offices in order to reduce and not to widen the digital divide[106].

The idea of the *guichet virtuel* is to provide direct access to the public authorities of all three layers of the state. In contrast to existing web sites of the authorities, which mostly reflect institutional structures[107], the organisation of the *guichet virtuel* will be based on people's everyday concerns (e.g. marriage, death, passports, moving etc.) and direct them straight to the relevant authority. Furthermore, when users are referred to other sites, they will be able to keep track of which section within the administrations they have been taken to. At a later stage, a real tracking system will be incorporated in the project. Consequently, four principles guide the construction of the *guichet virtuel*: the principle of real-life situations, one portal for all three levels of government, content switching and transaction support[108]. The *guichet virtuel* thus not only offers information, but also communication (via e-mail, discussion forums) and, most importantly, transaction[109] (e.g. submitting tax returns). During the pilot phase, however, transactions are only possible as far as no legally recognised signatures are required. In all other cases, legal foundations first have to be prepared and a digital signature developed. The same applies to the cantonal level, where no steps towards a general legislation on the digital signature have been undertaken so far. Thus many e-government transactions and services are today hardly possible for purely legal reasons and Switzerland has to make up its delay in comparison with other advanced countries[110].

As far as the Internet presence of the **Swiss Confederation** (http://www.admin.ch) is concerned, the essential elements of the *guichet virtuel* are not yet incorporated. The site is essentially structured along the formal organisation of the administration. It offers links to the federal council (executive), the chambers of parliament (legislative), the judiciary as well as the cantons and representations abroad.

All of the 26 **Swiss cantons** dispose of an own Internet site, the first of which had been realised in 1995. With this presence, cantons mainly aim at providing information, but many also seek for communication *and* interaction; and some aim at information of the media, improvement of administrative processes, e-government and first preparatory steps towards it, or work on the image of the canton. No specific target groups are defined, the service is rather provided for "everyone". In 2001, a general policy change was registered, with all but six

[104] About 60 projects are planned or already started, see ISCG (2001: 73-84). For the state of the art see http://e-gov.admin.ch/. E-voting is presented in section 1.6 of the present report.
[105] ISCG (2001: 37). The URL of the project is http://www.ch.ch/.
[106] Federal Chancellery (2001: 5).
[107] See for example http://www.admin.ch, the official web site of the Confederation.
[108] ISCG (2001: 36).
[109] An important example, though not actually part of the *guichet virtuel,* is the e-census 2000 (http://e-census.ch), a European first in the area of collecting statistics.
[110] ISCG (2001: 45f).

cantons planning to revise their Internet presence in the frame of an e-government strategy.[111] Important elements of this strategy were to provide government service through the Internet independently of place, time and structure, in a citizen friendly way, and according to individual living conditions.[112] While the majority of cantons agreed that e-government will play an important or very important role by 2005, the actual importance by the end of 2000 was estimated as rather low. Planned improvements in the cantonal online services concern for instance the domains of construction, public health and education. Fifteen cantons are planning to develop "functions of transaction" concerning financial and taxation matters. However, limited budget and staff resources, as well as problems concerning decision processes restrain the cantonal Internet strategies.[113]

One third of the **Swiss communes**, embracing two thirds of the population, disposed of their own websites; and 50-60 per cent of all communes intended to do so by the end of 2001.[114] The situation varies strongly with the size of the commune; all of the eight Swiss cities with more than 50.000 inhabitants run their own website. Their primary aim remains the diffusion of information, but certain communes distinguish further goals such as city marketing, improving the image and the services provided for citizens, e-mail communication, and online settling of administrative matters. The main target group are the current residents of the commune, and in some cases also potential future inhabitants or presently absent persons.[115] More complex forms of Internet communication such as online forms with payment functions, chat and participation of citizens are still very rarely used by communes, mainly due to lack of financial and personal resources in the communal budget. This restraint leads some communes to evoke the possibility of (partly) financing their websites via sponsoring and advertisement.[116]

1.4.3 Germany

One of the essential tasks in the German governmental action programme "Innovation and jobs in the Information Society of the 21st Century" is the e-government initiative *BundOnline 2005*[117]. This initiative was launched by Chancellor Schröder in September 2000 and is directed at a modern, efficient and citizen-friendly administration. With this initiative the Federal Government commits itself to provide online all central state services that can be placed on the Internet for the citizens, the business community, the federal and the local level until 2005.

The main issue of this action programme is to develop and apply technical standards for the country's public sector that are as uniform as possible. The main instruments are: paying systems, digital signature, encryption and call centres. The online offer is planned to be provided in the sphere of all state levels and to ensure the relevant inter-changeability between the administrative levels to achieve interoperability and compatibility.

According to the TNS Emnid-Survey "Government Online 2001", 17 per cent of the Germans have used the Internet to access Government Online over the last twelve months. This corresponds to 47 per cent of the people who used the Internet within the last month. The Government Online services are mainly used for information seeking (14 per cent), while

[111] *Ibid WHO?*.(3-6).
[112] Bucher (2001: 10).
[113] Prognos (2001: 4-5).
[114] Bucher (2001: 5).
[115] Prognos (2001: 7-10).
[116] Prognos (2001: 12).
[117] Http://www.bundonline2005.de/.

only 3 per cent of the Germans used transaction services, like using the Internet to pay for government services or products.
An important factor, which could be a barrier to use e-government is security: only 14 per cent of the Germans consider that it is safe to use the Internet to provide the Government personal information, while 83 per cent consider it is unsafe.[118]

1.4.4 Spain

In the Spanish government's *Info XXI* programme of 1998, the modernisation of the infrastructure used by public administration is one of the major objectives.

According to a 2001 survey of government websites conducted by World Markets Research Center and Brown University, Spain ranks 50 in terms of the delivery of information and services online via the Internet by government agencies. According to this report, which was questioned by the Spanish Ministry of Science and Technology, only 17 % of governmental sites offer online services, 100 % offer access to publications, 61 % provide access to Data Bases, and no sites offer information on Privacy and Security Policy or Handicap Accessibility.

There are contrasts within the Spanish Administration in the degree to which new technologies are being adopted. In general, the State Administration has made more progress than the Autonomous Regional Administration, and the latter more than the Local Administration.

1.4.5 France

Since the launching of the French governmental programme for the information society, PAGSI, in January 1998, online administration is a top priority of the "state modernisation" policy. A report of the *Commissariat général au plan* acknowledges that the public sector has, within 2 years, almost reached the level of the private sector in Internet access.
Within 4 years, 3500 public sector web sites have opened (3578 in May 2001) and there are 4.5 times more visitors. More and more administrative documents are released online and there are now 900 administrative forms online (compared to only 600 forms online 6 months earlier).
In 2001, almost 854 million euro have been spent for the computerisation of the public sector.
In a survey released by Taylor Nelson Sofres on 9 November 2001, France was ranked 11th of 27 countries surveyed in the use of e-government.

1.4.6 Italy

In 1993, Italy established an independent Authority for **Information Technology in the Public Administration**, AIPA (*Autorità per l'informatica nella pubblica amministrazione*)[119], which is constituted by five members named by the Prime Minister. The Internet was

[118] Taylor Nelson Sofres (2001).
[119] Http://www.aipa.it/.

introduced in the Italian public administration in 1998 through a significant measure, having three main objectives: to spread information on the institutional activity to citizens, to provide on-line services to citizens and to improve administration's internal communication.
In 2000 the Italian government launched an action plan for the information society, in accordance with the European programme e-Europe 2002.
Even if the situation is gradually improving, the actual level of informatisation of the administrations is still unsatisfactory. The main problem consists in the lack of qualified personnel. The engagement of public administration in online dialogue with citizens and the supply of services through the Internet are still modest.

Recently the important role of e-government was stressed by the Italian government which presented an ambitious plan to be implemented until 2006. The main purposes of the plan consist in: providing all main services to citizens and firms online; using technology in order to improve public administration efficiency and transparency; introducing adequate training for all public employees; and creating a system of customer satisfaction. [120]

In Italy **web-sites of public administration** are generally centred on district (*Comune*) level. This is the reason why some scholars use the expression "digital cities". Existing literature on public administration on the Internet refers to these experiences as "civic networks" (*Reti Civiche*), referring to the north-American experience of community networks.
Generally speaking, it is possible to single out three different types of web-sites of public administration in Italy: sites offering information for tourist promotion; sites spreading administrative or procedural information destined to citizens; sites providing spaces of interactive communication between users and institutions.
The annual report on digital cities in Italy which investigated the situation during 2000, underlined the strong presence of different administrative levels on the Internet. All the 20 Italian regions (*Regioni*), 91 % of the provinces (94 of 103), 93 % of the big districts (96 of 103) and almost half of the small districts (46.3 %) have an official web-site, managed and realized directly by the local administration. Besides the quantitative presence of the administrations on the Internet, the informative accuracy of these sites has also increased. The report on digital cities found a high level of information, while it detected that interactivity was still limited to the web-sites of the big districts. The same report informed on the contents which the web-sites focused on: proclamations and contests (67 % of the big districts); education and training (61.9 %); social services (56.7 %); employment (80 % of the regions). Even if interactivity provided by web-sites was still very modest, publication of administrative personnel's e-mail addresses started to spread on big districts' web-sites (27.8 % of them). Only 5.2 % of the web-sites introduced the possibility of communicating with the administration through forms.
The phenomenon of civic networks was particularly spread in those regions with a richer participative tradition (centre Italy). The experience of civic networks shows that they have brought a significant increase of the informational offer, favouring the access to public administration acts and guaranteeing administrative transparency for citizens (Rur 2001). Nevertheless, as De Rosa argues, the civic networks have often taken the shape of "showcases", limited to the diffusion of information, while the aspect of interactivity and communication has assumed a marginal role until now. The activity of the civic networks "doesn't seem to have seriously influenced political choices, the agenda setting and citizen's participation to decision-making processes"[121].

[120] Http://www.pianoegov.it/.
[121] De Rosa (2000a: 159).

While real possibilities of expressing their own opinion are offered to citizens, in the largest part of the cases, new technologies "generalize the possibilities of expression without giving guarantees of listening (...). [The citizens] have not real possibilities of influencing the decision-making"[122].

1.4.7 Netherlands

In parallel to the Dutch National Action Plan on Electronic Highways (see above) of April 1998, the Council for Public Administration (*Raad voor Openbaar Bestuur)* put forward a recommendation 'Serve and earn with ICT' (*'Dienen en verdienen met ICT'*) in which it pointed towards the possibilities the ICT sector offers for a more efficient, effective and more individualised service of the government for its citizens.[123]
In December 1998, Minister van Boxtel of Urban and Integration Policy presented the Action Plan 'Electronic Governance' (*Elektronische Overheid)*. This document describes how the authorities may give an impulse to the public services by means of ICT. One of the main themes was electronic access of Government Information. A single web-site was created, via which all sites of the public authorities could be accessed: www.overheid.nl, and as many public documents as possible would be posted on the web. Other initiatives for enhanced information exchange with the citizens by means of new media would include: interactive teletext, call centres and e-mail question and answer services.

1.4.8 United Kingdom

The British government's 'e-government' target requires that all government services be available online by 2005. At present government websites are mainly geared up to information provision rather than actual provision of government services online, as *The Guardian*'s recent claim that 'the most useful thing the websites offer is the ability to print out forms you would previously have to send away for'[124] suggests. Some departments, such as the Inland Revenue, do offer transactional services online, and one local council's website offers local residents a wide range of services, from the chance to check their council tax status to the possibility of paying parking fines online. However, such fully functioning government websites are currently the exception rather than the rule.
Possible glitches in getting government online include both technological and political issues. For example, in order that government services are provided securely, many transactional services will require the technology to deliver a digital signature so that citizens can put their names on forms or request official documents, and it remains doubtful that the government can deliver that by 2005. Political problems so far include the need for much greater central coordination by the government; as a recent report by the New Local Government Network pointed out, the ambitious target is unlikely to be met by 2005 if Whitehall continue to leave individual councils to find their own ways of putting the central government's ICT goals into practice[125]. Surveys have also shown that local authorities often have 'patchy or poor' understanding of Whitehall's plans to deliver government services online, which may lead to

[122] Http://www.cittadigitali.it/teledemocrazia.
[123] ROB 1998.
[124] Sarah Left, 'Public Services Online', Society Guardian, Tuesday 17 July 2001.
[125] Simon Parker, 'E-targets will be missed without Whitehall help, says report', Society Guardian, Thursday 5 July 2001.

problems with implementation at local level[126]. Use of government services online in the UK is currently slightly lower than the EU average[127] (see section 3.2.1 of this report).
In addition to getting government online, the Labour administration has also pledged to drive forward use of ICTs in other public sector bodies such as the National Health Service. In early 2001 the government launched a 4-year strategy to 'wire up the NHS to the Internet revolution', promising a 'vibrant, networked NHS' by 2005[128].

[126] Simon Parker, 'Councils ignorant of e-government target', Society Guardian, Monday 4 December 2000.
[127] For statistics see http://www.e-envoy.gov.uk/estatmap/government/use_web_site_usage.htm.
[128] Patrick Butler, '£500m plan to plug NHS into internet revolution', Society Guardian, Monday 15 January 2001.

1.5 E-safety and regulation of Internet content

1.5.1 Overview

Like any other type of media, the Internet raises a number of partially interconnected legal and ethical questions such as the freedom of expression, transmission and protection of personal data, and intellectual property, but also prevention of illegal or criminal activities or even e-terrorism. The international and cross-border nature of the Internet means that it is often difficult to determine which laws apply in case of conflict.

These questions are relevant to our field of research, in as far as the regulation of the Internet content may impede political communication. Freedom of expression is a particularly sensitive issue for citizen participation and mobilisation of civil society groups, in communication through the Internet just as much as in other forms of communication.
But also the aspect of safety of electronic communications, especially the authenticity of content and protection of personal data, becomes more and more relevant when citizens exchange data with the administration.

The growing spread and importance of the Internet network around the world facilitate diverse forms of activities that can be summarised as cyber-criminality. The diffusion of child pornography, acts of violence or racism via the Internet are only some of the most prominent examples, which confront the authorities with new legal disputes and call for measures to be taken.

The European Union has engaged in fighting against illegal and harmful content on the Internet since 1996. The most important instrument of EU action in this field is the **Safer Internet Action Plan**, covering the period 1999-2002 with a budget of 25 million euro. If the follow-up of the current Action Plan as proposed by the European Commission on 25 March 2002[129] is adopted, it will run until the end of 2004 with an additional 13.3 million euro budget. The 3 main action lines are:

- Creating a safer environment through promotion of hotlines, encouragement of self-regulation and codes of conduct.
- Developing filtering and rating systems, facilitation of international agreement on rating systems.
- Awareness: Making parents, teachers and children aware of the potential of the Internet and its drawbacks, overall co-ordination and exchange of experience

With these measures, the EU aims at fulfilling some of the goals set in the eEurope plan. It is centred around the idea of enabling the users to protect themselves from harmful content and achieving self-control of providers rather than containing any material sanctions.

Beyond the EU level, a first international legal instrument for combating computer and Internet criminality was the Council of Europe Convention on Cyber-crime[130], adopted on 23 November 2001 in Budapest. As at mid-March 2002, 33 countries including all EU Member

[129] Proposal for a Decision of the European Parliament and of the Council amending Decision No 276/1999/EC adopting a Multiannual Community Action Plan on promoting safer use of the Internet by combating illegal and harmful content on global networks Document, document COM 2002 152, at http://europa.eu.int/information_society/programmes/iap/docs/pdf/programmes/followup/follow-up %20decision_acte_en_ %20fin.pdf.

[130] Http://conventions.coe.int/treaty/EN/projets/FinalCybercrime.htm.

States (except Denmark and Luxembourg), Switzerland, USA, Canada and Japan have signed the Convention. However it will not enter into force until five countries have ratified it (so far none has ratified it).

1.5.2 Responsibility for Internet content

As the author of illegal content or activity is more difficult to identify in the Internet than in traditional media, regulating authorities and Internet service providers (ISPs) are debating about the legal responsibility for illegal content. According to the state authorities, providing access to such sites could be qualified as aiding and abetting and be sanctioned accordingly. Specific elements that were debated in different countries concern:

- subsidiary responsibility if the author of any illegal content cannot be taken to court or in any case
- what type of ISP can be held responsible (all types or only content-providers)
- whether the ISP must act on its own initiative or only after notification by the competent prosecution service
- whether detailed legal provisions and sanctions are necessary or whether self-control of ISPs is sufficient

The European Union has already issued a guideline regarding penal liability of ISPs.

The legal competence for content regulation, however, is still located at national level, and governments have become active at different moments and with various instruments, as can be seen in the country details below.

1.5.3 Data protection

As far as Internet related data protection is concerned, the EU has played a more active role than in content regulation. Considering the speed and volume of processing and transmission of personal data through the Internet, the existing EU legislation on personal data protection of 1995[131] needed further development. It was first supplemented in 1997 by a Directive[132] concerning the processing of personal data and the protection of privacy in the telecommunications sector in general. This legislation aimed at "harmonising the provisions of the Member States which are required to ensure an equivalent level of protection of fundamental rights and freedoms, and in particular the right to privacy, with respect to the processing of personal data in the telecommunications sector and to ensure the free movement of such data and of telecommunications equipment and services in the Community"(Scad-plus).
For taking account of the latest developments in the field of electronic communications technology, the Commission submitted a proposal for a second Directive[133] in July 2000,

[131] Parliament and Council Directive 95/46/EC of 24 October 1995 on the protection of individuals with regard to the processing of personal data and on the free movement of such data (OJ L 281, 23.11.1995).

[132] Parliament and Council Directive 97/66/EC of 15 December 1997 concerning the processing of personal data and the protection of privacy in the telecommunications sector (OJ L 24, 30.01.1998).

[133] Proposal for a Directive of the European Parliament and of the Council concerning the processing of personal data and the protection of privacy in the electronic communications sector (COM(2000) 385 final COD/2000/0189 - Official Journal C 365, 19.12.2000). (The proposal is currently being examined by Parliament for an opinion at second reading under the Co-decision procedure.) The draft Directive is part of a wider electronic communications regulatory package consisting of four other Directives and a Decision.)

introducing the principle that consumers and users should get the same level of protection regardless of the technology by which a particular service is delivered.

1.5.4 Switzerland

A new media penal code became effective in Switzerland on 1 April 1998, however some questions regarding the interpretation of the code remain to be solved. Legislation on penal liability of ISPs is currently being elaborated and takes into account EU guidelines in this field.
However, implementation of the legal provisions is yet another aspect, proving particularly difficult in this fast-changing medium: Limited personnel and financial resources equally complicate criminal prosecution. In fact, only a few cantons have a specialized police force to combat cyber-criminality. For these reasons, an inter-cantonal team for the fight against the abuse of new information and communication technologies was constituted in June 2000 and presented some proposals in January 2001. Among other things, they suggested the creation of a monitoring authority within the FOP's division "Analysis and Prevention" as well as a clearing authority within the Federal Criminal Police. Their respective tasks would be on the one hand systematic enquiries about illegal content in the Internet and co-ordination of indictment and court procedures in the field of cyber-criminality, on the other hand. Furthermore, analytical capacities should be strengthened[134].
To sum up, one can say that Switzerland already has sufficient legal provisions in its penal code allowing regulation of Internet content and combat against cyber-criminality. However, as far as criminal prosecution is concerned, the shortage of resources, the lack of co-ordination between cantons as well as unsolved controversies about the liability of ISPs still hinder effective implementation.

1.5.5 Germany

With the intention to create some kind of clarity on responsibilities in this field, Germany was the first country to pass a law which regulates the free-wheeling global electronic space of the Internet in 1997: the so called "Information and Communication Service Act (IuKDG)" also known as "The Multi Media Law". One of its central objectives was to create a legal platform to deal with Internet crime and with conflicts arising from the use of the Internet.
Ever since the IuKDG is the legal framework of the new Information and Communication Services on the federal level in Germany.[135] There are also state (Länder) equivalents and there is an agreement between the states of 1997 called "Mediendienste-Staatsvertrag", which governs the delivery and content of media between the German states. Finally, Germany is subject to all of the particulars of the various EU agreements on areas such as data protection.

While some laws, as the multi media law or the law on digital signature, have been aimed specifically at the Internet, generally the same laws apply to the Internet as to other publishing media. The Internet is treated by the legislative body as just another branch of the Media,

[134] Federal Office for Police (2001: 14f).

[135] The IuKDG is an article act. The first three acts content reorganisations: Act on the Utilization of Teleservices, Act on Protection of Personal Data Used in Teleservices, and the Act on Digital Signature. The following six acts provide amendments of the Penal Code, the Administrative Offences Act, the youth protection act, copyright Act, the Price Indication Act and the Price Indication Ordinance. The whole text and further documents are available at http://www.iid.de.

where freedom of expression will be guaranteed. Censorship is prohibited by the German constitution and that applies to the Internet as well.

An important issue in the context of Internet regulation is the liability for content transmitted over the Internet. The liability of the ISPs for content of the websites they host is regulated in the IuKDG. According to Article 1 of the Teleservice Act (Teledienstgesetz) an Internet service provider is not liable for the content of websites it hosts. But online providers can be prosecuted for offering a venue for illegal content if they do so knowingly and if it would be technically possible and reasonable to prevent it (Article1, §5).
In addition the ISPs follow a voluntary and self-regulatory approach. Within the scope of the "Voluntary Self-Control of Multimedia Services" association ("Freiwillige Selbstkontrolle Multimedia-Dienstanbieter") the ISPs have mutually agreed upon their own code of conduct. They are obliged to avoid creating or knowingly carrying content that violates existing German state law. "For ISPs the issue is not only one of ethics, but also about problems surrounding the question of liability for content. (…) It has emerged in several cases, however, that German courts have obliged ISPs to ban a site if and when the ISP obtains knowledge of illegal content offered on it. A well-known case was that of the head of Compuserve's German branch, Mr. Somme, who was convicted in a trial in Munich and was held responsible for pornographic photographs of children that had been published on a site hosted by Compuserve."[136]

An interesting point is that German courts tend to consider providers (and users) responsible for contents on pages they offered links to on their websites. Also if the connection with the offensive content consists not only in one link but in a series of links.[137]

In general law enforcement depends on close cooperation with ISPs in order to fight against Internet crime. On several occasions the German BKA (the Federal Police Agency) has invited Internet service providers, politicians, experts and members of law enforcement agencies to discuss ways of combating Internet crime, with the intention to promote a closer cooperation between ISPs and the police. An important meeting took place in February 2001. The main fields of Internet crime were identified as:
- circulation/ownership of child pornography
- publishing of right or left wing extremist content or xenophobic content
- economic crime and fraud in the field of e-commerce
- software piracy/issues of intellectual property rights
- drug and arms trafficking where the Internet is used a means for clandestine communication
- hacking into company networks/servers

The meeting resulted in a joint declaration by the participants. They agreed in the need for a regular and confidential exchange of information between all parties involved. At the end they agreed upon the following measures:
- enhancing and deepening of contacts between ISPs, the federal police forces and the police forces of the states, including the setting up of contact offices for notifying crimes
- regular and event based meetings to optimize the flow of information
- a plan to establish a clearing house for Internet related information with the BKA.[138]

[136] Jansen (2002).
[137] For more details, see: http://www.bmck.com/ecommerce/hyperlinks.doc.
[138] Jansen (2002). Full text of the declaration at http://www.bka.de/aktuell/agenda98/gemeinsame_e.html.

1.5.6 Spain

In Spain, a framework law on services in the Information Society and on e-commerce is currently in the legislative process. A project of the law was adopted by the Government in February 2002 and is now pending Parliament's approval.
While guaranteeing the general freedom to provide services, the law addresses the issues of regulation of Internet content resp. state surveillance of Internet communication by defining the restrictions that state authorities may apply to the provision of services.

Article 8 of the law stipulates that the authorities can pass measures to interrupt the provision of services or withdraw data contained in particular sites, when these infringe the following principles:
- The maintenance of public order, public safety, and national defence, and the conduct of criminal investigations.
- The protection of public health or of consumers and users, even in their role as investors
- The respect of a person's dignity and the principle of non discrimination for race, gender, religion, opinion, nationality, and any other personal or social circumstance
- The protection of youth and children

The law project also tackles the problem of applicability of national rules for cross-border services. If the provider is based outside Spain, the authorities can contact the appropriate transmission provider so that they undertake measures to prevent access to these providers or their data.
The measures that can be taken must be objectively determined and follow the principles of proportionality and non discrimination.
Different degrees of responsibility are laid down for different types of service providers in the information society (for instance net operators, access providers etc), and for different types of activities (such as creating a temporary copy of data requested by the users, storage of information, facilitating links to sites or search engines etc.).
Article 17 sets up a code of behaviour, to which service providers fulfilling certain criteria can adhere and obtain certification on their adherence.
Once adopted, the provisions of this law will be binding and can be enforced through sanctions including coercive fines.

Besides content, the law also addresses issues linked to e-safety such as commercial communication via e-mail and equivalent media, and electronic signatures and validity and consequential character of contracts through the Internet

1.5.7 France

In France, the independent administrative authority CNIL (*Commission Nationale de l'Informatique et des Libertés*)[139], created in January 1978, deals with 'ethical' problems raised by computer technologies and, later on, by the Internet, such as secrecy and private life. CNIL is composed of 17 members, among which 2 members of Parliament, 2 senators and representatives of several administrative or judicial bodies: Conseil d'Etat, Cour de Cassation, Conseil économique et social etc. Traditionally its role was to control the creation and use of files (use of personal data, cross-files, etc.). With the rise of Internet it became responsible for the respect of privacy, use of personal files, etc. on the web.

[139] Http://www.cnil.fr

A decree of the 16 May 2000 established in addition the Central Office to fight criminality linked to new technologies *(Office central de lutte contre la criminalité liée aux technologies de l'information et de la communication)*.
During the summer 2001, France legalised an interconnected file on criminal infractions, which had already been operational since 1995.
In the post-September 11 context, a bill on 'daily security' was adopted that, according to many organisations (*Ligue des droits de l'Homme, Syndicat de la magistrature, Syndicat National des Journalistes, Reporters sans frontières, ATTAC*), threatens individual freedom especially in the communication sector. It deals mainly with the time during which connection data could be kept, and access to keys to decipher electronic data.
For combating e-terrorism, France created the Computer emergency response team/administration CERT/A, which detects attacks against State information systems.

1.5.8 Italy

The Italian data protection commission (*Garante per la protezione dei dati personali*)[140] is a collegial organ whose members are elected by the parliament. It was installed on March 1997. The commission, founded in accordance with the European commission directive, works in full autonomy. It fulfils a rather broad series of tasks. In the case of Internet, it grants the protection of privacy and control on treatment of consumers' personal data.
There is a strong correlation between the development of electronic commerce and the effective protection of personal data. Lots of services offered by ISPs are "defined as free but in reality they are not, because they are provided in exchange for a precious commodity, the personal data".[141] The commission settled a series of rules in order to sensitize Internet users who often "don't know that their personal data have been picked up and subsequently elaborate and that they could be used for purposes obscure to them"[142].

In the 2001 electoral campaign, political parties used the Internet and mobile phones as important arenas of political communication and electoral propaganda. In order to gather information, political parties used methodologies not always conforming to the normative on personal data's protection. On November 2000 the commission started to verify the political communication strategy of the national association "Lista Pannella", after receiving numerous complaints from citizens. Those complaints denounced the reception of e-mails containing political communication messages. The association had gathered over 390 000 addresses of e-mail using a software that captured e-mail addresses published on web-pages with suffixes ".it", ".org", ".com" and ".net". The guarantor has established this as illegitimate and incorrect use.

1.5.9 Netherlands

The Dutch government had installed a committee 'fundamental rights in the digital age', that has in May 2000 advised the authorities on the adjustment of articles 7, 10 and 13 of the Dutch Basic Law. The articles deal with respectively freedom of speech, right to privacy and the confidentiality of mail, telephone and telegraph.

[140] Http://astra.garanteprivacy.it
[141] Garante per la protezione dei dati personali 2000: 3.
[142] Garante per la protezione dei dati personali 2000: 72.

In order to take away ungrounded fears amongst the general public and small and medium enterprises on Internet usage and to warn the population for the possible dangers that are present on the world wide web, the government has initiated a special website that is called http://surfopsafe.nl. It draws attention to the risks of viruses, hackers, electronic fraud, abuse of personal data and undesirable content of websites.

1.5.10 United Kingdom

Parallel to the UK online aims of developing ICTs in Britain runs another agenda, that of state regulation and control of Internet activity. This policy agenda has been developed through the Home Office, whose activities have focused on three areas: interception of communications, Internet crime and Internet security. Following September 11 these activities seem set to be strengthened further with regard to intercepting and combating any use of the Internet by terrorist networks; as Richard Sarson argues, the 'debate has been re-opened by the activities of Osama bin Laden'[143]. The policies relating to interception of communications increase the ability of the state to monitor UK Internet activity. Especially controversial has been the Regulation of Investigatory Powers (RIP) Act 2000, which provides the state with powers to monitor domestic communications[144]. Despite fierce opposition from many MPs, the Act was passed by Parliament in the course of 2000.
Considerable concern has been voiced in the UK about the RIP Act. It has variously been described as 'disgraceful', 'draconian' and 'the most pernicious invasion of privacy ever imposed by a democratic state' by those campaigning against it, who include the Foundation for Internet Policy Research and the Campaign Against Censorship of the Internet in Britain[145]. Concerns have mainly centred around citizen rights to privacy, freedom of expression and freedom of communication, and although the RIP Act claims its main purpose is to 'ensure that the relevant investigatory powers are used in accordance with human rights', no such framework of citizen rights currently exists in the UK explicitly in relation to new media.

Other Internet surveillance measures have followed the RIP Act. For instance, it was revealed in December 2000 that the UK government, through the security services, was developing a system to monitor communications data for all UK voice and data communications[146]. In addition, consumer concerns such as making the Internet safer for children, online codes of practice on Internet trading and reducing the scope for online fraud are being addressed by the Home Office in partnership with industry watchdogs such as the Internet Watch Foundation.

The regulatory and legislative measures currently in place for ISPs are due to change under the new regulatory body OFCOM. The Internet service providers association (ISPA) is a voluntary self-regulatory trade association founded in 1995. It seeks to actively represent and promote the interests of businesses involved in all aspects of the UK Internet industry. It has a code of practice and works with the government to implement legislation such as the RIP Act. The ISPA helped to establish the Internet Watch Foundation and requires its members to provide a 24 hour point of contact to the IWFG in order that they can receive notification of illegal material which must then be immediately removed from their servers.

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[143] Richard Sarson, 'The Politics of IT: Does IT Lead to Utopia or Dystopia?' at http://www.sourceuk.net/articles/f02043.html
[144] Mobbs (2000).
[145] Websites at www.fipr.org.uk and http://www.liberty.org.uk/cacib respectively.
[146] Mobbs (2000).

1.6 E-democracy and e-voting

1.6.1 Overview

In Europe, visions of using the Internet as an instrument for citizen participation in the political process have mainly focussed on the field of expressing and exchanging opinions, and other verbal action forms. Extending this participation to actual democratic voting through the Internet is still a less supported project. While there has not been any relevant public discussion on electronic voting in Germany, Spain, France and Italy, such a debate has already lead to actual pilot projects in Switzerland, the United Kingdom and the Netherlands.

Reflecting the strong Swiss tradition of direct democracy, e-voting is most advanced in this country. The existing projects of e-voting at local and cantonal level are presently being examined at federal level with a view to create a nation-wide project. The most concrete plans are developed in the canton of Geneva, where e-voting will become a regular form of political participation in 2003 if the current series of test e-votes proves to be successful.

Apart from economic arguments such as reducing the costs of voting for the citizens (i.e. travel time and cost), supporters of e-voting also hope to win inactive voter groups. This is for instance a declared objective of the initiatives of the British Labour government, who wants to engage in particular the under-40s in the democratic process.
The existing digital divide, that is the inequalities in Internet use between genders, age groups and social groups, is still setting clear limits to a broader introduction of e-voting in general elections. Other more practical problems concern security and data protection issues (i.e. how to assure that electronic votes are not technically manipulated and that voters are guaranteed secret vote), as well as administrative issues (e.g. how to build and manage electronic registers of voters at all state levels, or how to deal with elections at several levels on the same day if e-voting is only introduced at, say, local level).

1.6.2 Switzerland

Switzerland's second important project aiming at political participation via the Internet *(besides e-government, see above)* is e-voting. Based on a decree of June 2000[147], the Federal Chancellery established a working group composed of representatives of the cantons and the Federal Statistical Office in summer 2000. So far, this group has organised three meetings to discuss political and technical aspects of e-voting. Additionally, it carried out a survey on e-voting among cantons in order to gather information about existing legal provisions, pilot projects and the interest in a collaboration with the Confederation. Even more than the *guichet virtuel*, e-voting has to be a nation-wide project including all cantons and communes, co-ordinated by the Confederation. Given the fact that communal, cantonal and federal votes are often held at the same time, the new form of participatory democracy can only show its effects if there is one solution compatible at all levels of government. With respect to pilot schemes, an agreement has been reached with three cantons (Geneva, Neuchâtel, Zurich). The project in the canton of Geneva is particularly developed because a legal basis as well as a central register of voters had already existed. Two tests were conducted on the occasion of the federal and cantonal votes on 10 June and 23 September 2001. In March 2002 a third test will

[147] Http://e-gov.admin.ch/de/index.php.

be held under conditions close to reality. In case of success, Geneva will officially introduce e-voting later in 2002. As a next step, e-voting shall be made applicable for elections as soon as 2003[148]. At the federal level, an important prerequisite of e-voting does not exist until now: the harmonisation of the Swiss register of births, deaths and marriages respectively the construction of a federal electronic register of voters. Legal provisions for harmonisation, however, cannot be expected before 2004. In the meantime, the latest report[149] on the subject has to be approved by Parliament, a legal basis for pilot schemes realised and cantonal pilot phases evaluated. Moreover, the problem of the digital signature has to be solved[150].

1.6.3 Netherlands

In 1999, the Dutch Ministry of Home Affairs started a project 'voting at distance' (*Kiezen op afstand*), that examines the application of new technologies to voting procedures. One of the issues under research was voting by Internet. During the general elections of 2002, experiments will be carried out and shadow elections will take place by electronic means. '*Nederland gaat digitaal'* is the title of the public information campaign that has informed the citizens of the benefits and state of affairs of ICT since April 2000. It is a common initiative of the Ministry of Economic Affairs, The Ministry of Transport, Public Works and Water Management, the Ministry of Interior and Kingdom Relations, the Ministry of Education, Culture and Science and the Ministry of Justice.
Discussion on e-democracy in the Netherlands is also stimulated by civil society actors and coalitions such as the Electronic-highway Platform Nederland (EPN) and the virtual Platform for electronic voting (PELS). The EPN, an independent organisation where private sector, politics, science and government cooperate, aims at stimulating a stable introduction of ICT in society. EPN carries out research, publishes and organises debates on ICT and society. Examples of recent initiatives are recommendations on ICT for the coming parliamentary elections in the Netherlands and a forum discussion on the possibility of referenda by Internet. One initiative that EPN created in 1999 jointly with Domestic Governance *(Binnenlands Bestuur),* IPP*,* Dutch telecom (KPN) and 'Media Plaza', is the PELS. Many national politicians have signed the pleads made by PELS to explore electronic voting.

1.6.4 United Kingdom

The concept of e-democracy is associated with efforts to broaden political participation by enabling citizens to connect with one another and with their representatives via new information and communication technologies[151]. Hague and Loader set out the ideal of e-democracy as follows:

> *''Strong democracy' requires strong and interactive links between the state and civil society, between government and the governed ... we have the prospect of national and local governments interacting with citizens via web sites, e-mail addresses and public information kiosks. We also have experiments with electronic voting, electronic voter guides, citizen juries and the like.'*[152]

[148] Bundeskanzlei (2002: 4f). On e-voting in canton Geneva see: http://www.linux-gull.ch/evote/index.html.
[149] Bundeskanzlei (2002).
[150] Bundeskanzlei (2002: 39).
[151] See Hansard Society website at http://www.hansard-society.org.uk/eDemocracy.htm for further details.
[152] Hague/Loader (1999: 13).

E-democracy is being taken increasingly seriously at the top of the Labour administration, with a Cabinet committee being set up to discuss e-democracy in November 2001. Since then, Labour Leader of the Commons Robin Cook has argued that greater use of the Internet in UK politics may prove a means of engaging those sectors of UK society who tend not to vote at present, such as the under-40s, in the democratic process[153]. His proposals include 'enfranchising' citizens by ensuring that Britain becomes the first country in the world to use the Internet for voting, and using the web for daily citizen feedback to parliament on policy choices facing MPs. Pilot schemes for local elections begin in the spring, with an outside chance that voting by internet could be in place for the next general election. Cook has expressed strong concern over the 'digital divide' and argued that Parliament needs to guard against UK citizens' increasing disenchantment with the political process by showing that it is 'not just a cockpit for party political sparring'[154].

[153] Jackie Ashley, 'Cook plans to make UK first to vote on Internet', Society Guardian, Monday 7 January 2002.

[154] Quoted in Cabinet Office press release CAB 199/01, 10 December 2001, at http://www.cabinet-office.gov.uk/2001/news/011210_modparl.htm.

2 Internet usage

Most information about Internet access and utilization is based on polls and surveys, conducted generally by market research companies at the request of various institutions. Basically all these surveys show a steadily growing share of the population who access and use the Internet in the seven countries of our study as in the rest of Europe. However, comparing the results of several surveys on Internet usage in one or in several countries significant differences between the studies are recognisable. A comparative analysis of several studies about online-usage in Germany available for 1998, conducted by Wingert, shows that there are five sources which may cause differences and incomparability:[155]

- Population und sample
- Question (only access to online-equipment or also owner?)
- Does the question refer to the possibility or the actual usage?
- Definition of usage
- Social context of the interviewee and bias of the questioning method.

Results may also differ depending on whether the surveys are conducted offline (questionnaire, telephone interviews etc.) or online. As online surveys are often only based on the decision of the users to take part in the survey and not on a precise sample, there may be strong biases. Offline surveys are more often based on a representative sample. Another advantage of offline surveys is that it is also possible to ask people who do not have Internet access. This may provide interesting results concerning the reasons for non usage or barriers.
However, a lot of the polls are conducted online. On the one hand many queries are only about the usage of the Internet and on the other hand this method is much cheaper.

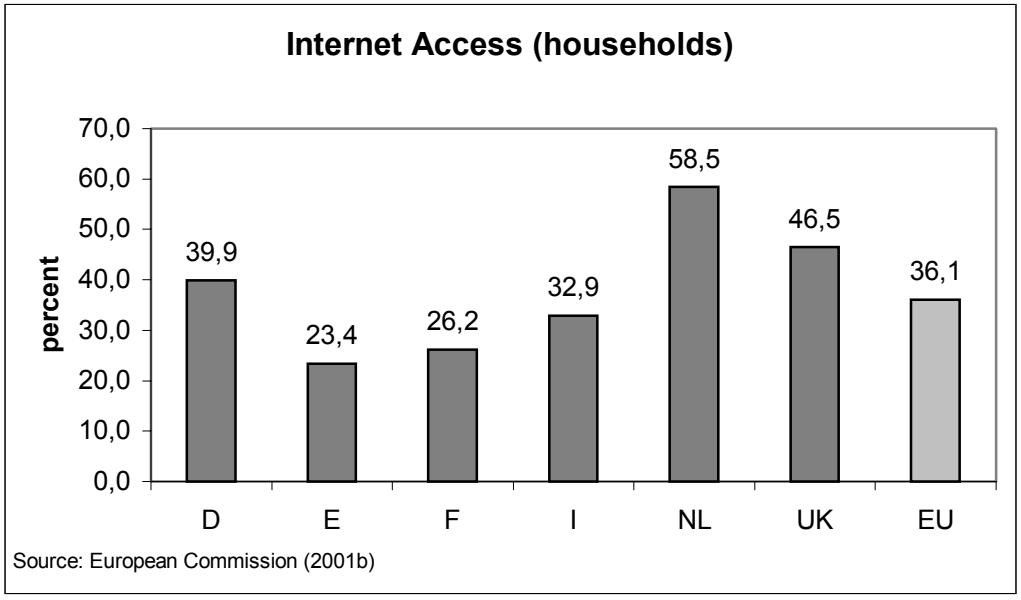
As mentioned above there are further problems with specifying the actual usage. There is no common definition of Internet use in the existing surveys. In some cases, use means a regular, in others an occasional activity.

For these reasons the national statistics of the countries are not really comparable. Therefore we will first take a look at comparative surveys to show similarities and difference between the countries of our project. We will concentrated in the following on the findings of the Flash Eurobarometer 103.0, Eurobarometer 55 and the TNS Interactive Global eCommerce Report, all conducted in 2001. Unfortunately none of these surveys include Switzerland, so here, we need to refer to other data.

[155] Wingert (1998: 212)

2.1 Access and usage

According to the Flash Eurobarometer 103.0 the percentage of households having an Internet access ranges among our six countries from 23,4 % in Spain to 58,5 % in the Netherlands. The Netherlands, the United Kingdom and Germany have a higher level of households with an Internet access than the average of the EU member states (36,1 %). In Italy, France and Spain the percentage of households with an Internet access is lower than the EU average.[156]

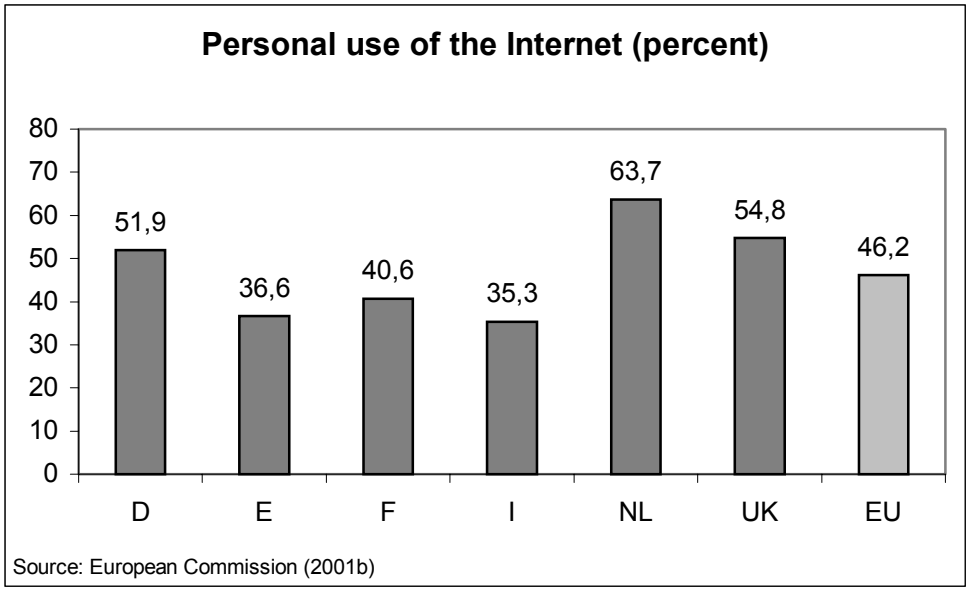


To provide an impression of the Swiss position in regard of Internet access the chart below shows findings taken from the Internet Monitor. The general higher level of Internet access in all countries compared to the results of the Eurobarometer 103.0 may be due to different methods used, which may result in different findings as discussed above. So, the findings of the Internet Monitor refer to the Internet Access of people instead of households, which may partly explain the general higher level for all countries. However, it can be assumed that in Switzerland as in the Netherlands there is a higher level of Internet access than in the other countries of our study.[157]

Internet Access 2001 (Inhabitants > 15 in %)	
Netherlands	61.2
Switzerland	60.4
United Kingdom	53.2
Germany	49.1
France	47.3
Italy	40.1
Spain	21.2
Europe	45.4
Source: Pro Active (2002)	

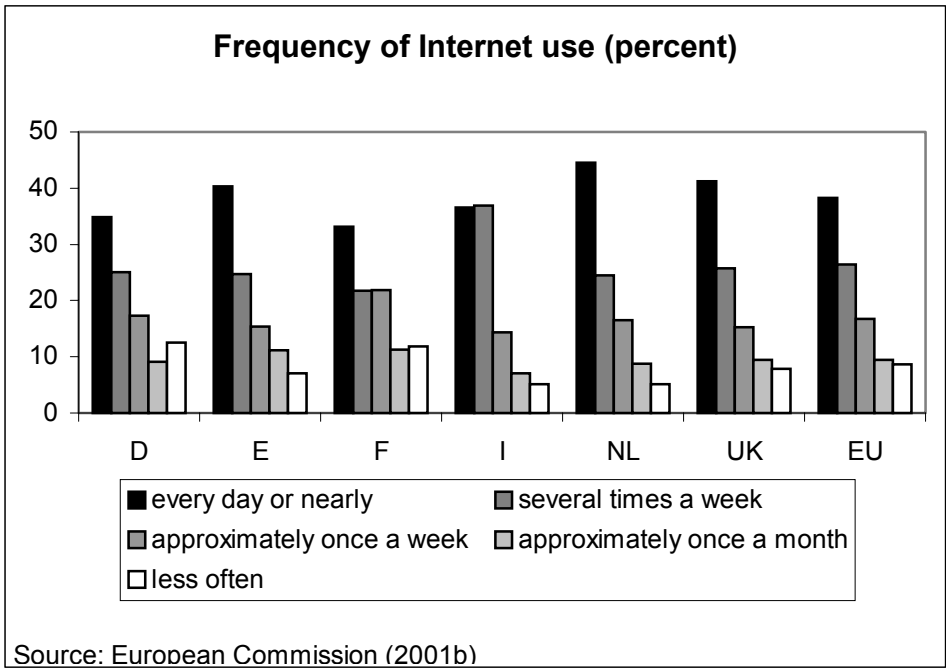
[156] European Commission (2001b)
[157] Pro Active (2002)

Turning back to the findings of the Flash Eurobarometer 103.0 a similar picture occurs in regard to the personal usage of the Internet in comparison to the level of households with an Internet Access. In the Netherlands, the United Kingdom and Germany people use the Internet more often than the average of the EU citizens (46.2). The level of Internet usage in France, Spain and Italy is lower than the average of the EU member states.



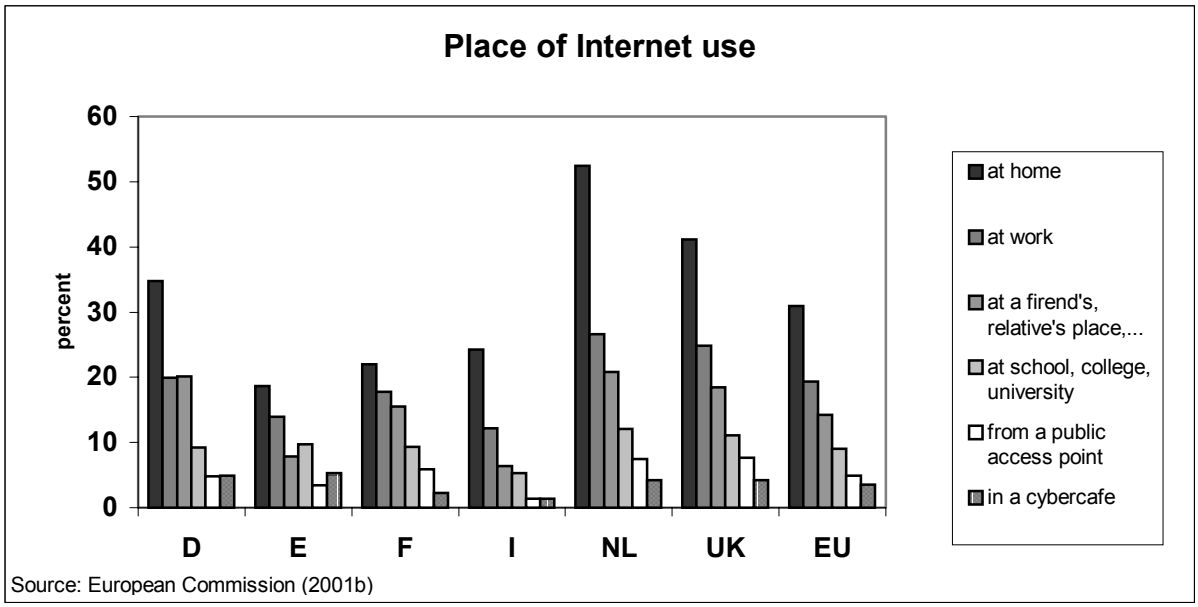
Combining the different sources in regard to Internet access and usage it seems possible to distinguish the seven countries of our project in three groups. One group with an averagely high level of Internet access and usage includes the Netherlands and Switzerland. A second group with a medium level includes the United Kingdom and Germany and a third group with a relative low level of Internet access and usage includes France, Italy and Spain.

Below the frequency of Internet use is represented. While there are also variation between the countries it can be shown that most of the Internet users go online “every day / nearly every day” or “several times a week”.



Source: European Commission (2001b)

The share of people who use the Internet approximately once a month or less ranges from 8.2 % in the United Kingdom to 23.2 % in France. But this seems not be related to the general level of Internet usage in a country. Italy - with the lowest use of Internet usage in comparison to the other countries - has the second lowest level of people who use the Internet less than once a week with 12.2 %. That is less than the share of such frequency of usage in the Netherlands (13.9 %).



Source: European Commission (2001b)

The figure above shows that the most often used place to access the Internet in all countries is at home, followed by the usage at work and at a friend's or relative's places. In all countries the Internet is used from a public access point or in a cyber cafe by less than 10 % of the Internet users.

For Switzerland, the studies of the Pan European Internet Surveys show that with a total average penetration of Internet of about 49 % (for the period of April 2000 to March 2001),

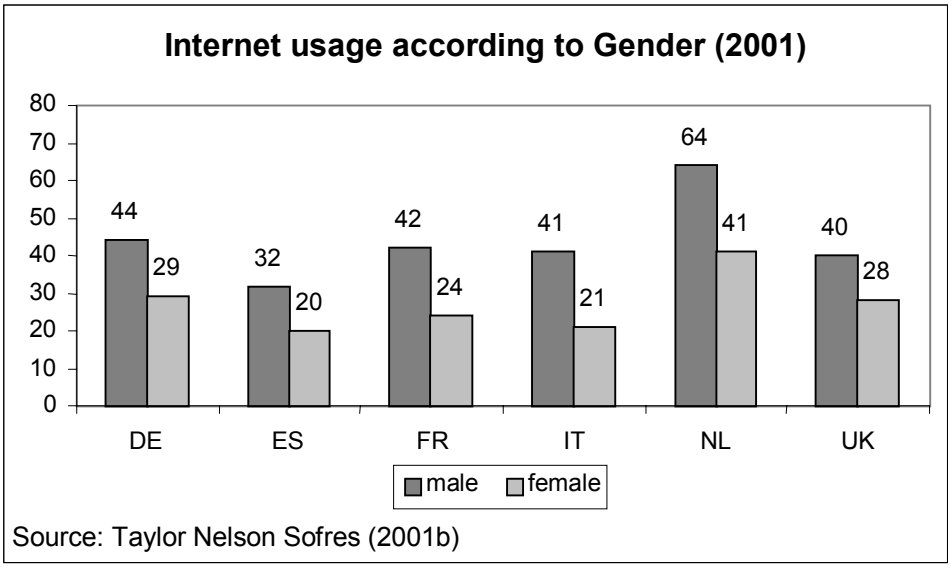
Switzerland has a higher level of penetration than France, Germany, Spain and the United Kingdom, which were also included in these surveys. In Germany 34 % of the population used the Internet at that time and in France about 35 % did so. But Switzerland seems not only to occupy a leading place in terms of Internet penetration but also in terms of daily usage. About 25 % of the Swiss population last used Internet "the day before" the survey was carried out. About 21 % of Swiss residents use Internet on average daily or almost daily.[158]

[158] EJIC – EURO-JIC's Pan European Internet Surveys (2002: 4). For the Swiss case EJIC refers to data of by WEMF AG für Werbemedienforschung (2001). For the year 2001 these are wave 1/01 and wave 2/01 from April 2000 to March 2001.

2.2 Internet use and demography

As shown, there are still important differences between the countries of our study in regard of access and usage. In the next step we will have a closer look at the socio-demographic characteristics of the Internet users in each country. Since there are few comparative surveys which go down to this level we briefly present some findings of the "TNS-Interactive Global eCommerce Report" on gender and age, which unfortunately also does not include the Swiss case.[159] Afterwards we go into the situation in each country in more detail by primarily using national sources.

In the six countries men are still more likely to use the Internet than women, although this proportion differs across the countries.



Source: Taylor Nelson Sofres (2001b)

In the Netherlands, the percentage of women who use the Internet is the highest with 41 % in comparison with the other countries, where only between 20 % (Spain) and 29 % (Germany) of the women use the Internet. In all countries the share of Internet users among men is much higher, e.g. in Italy, there are nearly twice as much percent Internet users among men than among women.

In regard of the Internet penetration within the different age groups, the Netherlands have the highest share of Internet users in nearly each of them. But also in the Netherlands, the share ranges from 97 % of Internet usage among people aged under 20 years to19 % among people who are older than 60 years. Generally, in all countries such variation can be observed. In most cases Internet use becomes less common as age increases.

[159] Taylor Nelson Sofres (2001b)

Internet usage according to age (2001)							
	Germany	**Spain**	**Italy**	**Netherlands**	**United Kingdom**		**France**
under 20	47	55	49	97	60	**under 25**	60
20-29	60	45	55	59	50	**25-34**	46
30-39	55	32	32	64	45	**35-49**	36
40-59	36	17	30	54	33	**50-64**	21
60 +	8	3	9	19	7	**65 +**	4
Source: Taylor Nelson Sofres (2001b)							

Between the countries the share of Internet users according to age groups also heavily differs. Thus the share of Internet users among people who are younger than 20 ranges from 47 % in Germany to 97 % in the Netherlands. In Italy and Spain only 32 % of the people who are aged between 30 and 39 are online against 64 % of the people within that age group in the Netherlands. The share of people between 40 and 59 ranges from 17 % in Spain to 54 % in the Netherlands. Finally, Spain has the lowest Internet penetration among people who are older than 60 years with a share of 3 %.

In the following we will discuss national data sources to get some more detailed information in regard of social structural differences concerning the Internet usage in each country separately. Basically, all these findings confirm that there are still large differences in Internet usage along socio-demographic variables in all countries of our study. Besides age and gender, socio-economic variables such as educational level, income and the geographical region where people live in, seem to strongly influence the likelihood to be an Internet user. Recognizing the danger of "Haves" and "Have-Nots" in the Information Society, national discussions about a digital divide have occurred in all of our countries at different levels and many initiatives and actions have been started to support Internet access for all social groups as shown in detail in section 1.1. How successful these will be, has to be proved over the next years. However, it has to be considered that in the moment the still exiting inequalities of Internet penetration among different social groups influence the possibilities the Internet may offer as a new arena for political communication, especially in regard to the public sphere.

2.2.1 Switzerland

Also in Switzerland Internet has been and still is used in its majority by men. By early 2001 27.3 % of Swiss women used Internet compared to 47.9 % of their fellow male residents. [160] In terms of age the highest proportion of Internet users can be found among 20 to 29 year olds. In 2001, 55.6 % of the Swiss population aged 20 to 29 used Internet at least several times a week, while only 18.3 % of persons aged 50 and more did so. This latest group represents the weakest one in terms of Internet usage since the "early days". Youth aged 14-19 used to be a group almost as weak as the just mentioned one (1997), by 2001 however they represent the group with the second highest level of frequent Internet usage.[161]
In regard to the level of education the relationship is: the higher the level of education the higher the proportion of persons using the Internet. While in 2001 only 22 % of Swiss

[160] Information on the socio-demographic characteristics of Internet users in Switzerland is available from the Swiss Federal Statistical Office that uses without exception data gathered by WEMF AG für Werbemedienforschung (2001)
[161] Federal Statistical Office (2001: 5)

residents with obligatory education used Internet at least several times a week, 58.4 % of persons with a higher education and 70.8 % of persons with a University degree did so. The gap between less educated and highly educated persons (speaking about level of formal education reached) becomes even wider as the total proportion of Internet users rises.[162]
As survey data additionally shows, the household income can be considered as an intervening variable (at least if it is rather low): Only 6 % of the Swiss population living in households with an income up to 4000 Swiss Franks a month used Internet in the beginning of the year 2000 compared to 34.6 % and 38.5 % living in a household with a monthly revenue of 4000 to 8000 Swiss Franks or more than 8000 Swiss Franks respectively.[163]

2.2.2 Germany

In Germany 59 % of the Internet users are men in 2001. Given to 52 % of women in the total population, woman are still under-represented with a share of 42 % within the group of Internet users. The older the people are, the less likely they are to be Internet users. Two-third of the people aged 14-29 and about 50 % of the 30-49 aged are online. Only every third person of the 50 to 59 aged uses the Internet. The level among the 60 and older aged people declines to 8.1 %. However, looking at the development in the last years, the share of older people is constantly growing.[164]
In regard to the formal level of education only 18 % of the people with secondary school qualification use the Internet. Their share of the Internet users only increased marginally during the last years, while the share of all other educational groups increased much faster. Within the group of people with a secondary modern school degree 45 % are Internet users in 2001 and about 60 % of people with an A-level or an university degree use the Internet.[165]
The largest group of the Internet users lives in a household with an income of 6000 DM and more (34 %). Thus, they are the most over-represented group compared to their share within the total population of 23 %. People living in a household with an income of 3000 DM or less are under-represented.[166]

2.2.3 Spain

In Spain men, young adults and the middle and upper classes are the groups where use of Internet is most prevalent. In 2000, men represented 62 % of the people who used the Internet last month. About 69 % of the Internet users are 34 or younger and the share of people aged 45 or older is only about 15 %. In regard to the socio-economical background about 89 % of Internet users belong to the upper class (23.7 %), the middle upper class (27.9 %) or to the Middle class (37.6 %). In contrast, only about 11 % belong to the lower middle class (9.1 %) or the lower class (1.4 %).
Despite these socio-demographic disparities, the diffusion of Internet use across the Spanish regions has been rather homogeneous. As expected, the most developed regions - Catalonia, Basque Country, La Rioja, and Madrid - are the ones with the highest Internet use rates, whereas the poorest regions - Extremadura, Galicia, Castilla-Mancha- are the ones with the

[162] Federal Statistical Office (2001: 4)
[163] Hunziker (2001: 3). Internet is being used by 20.9 per cent of all those persons not responding to the question of their household income.
[164] ARD/ZDF-Projektgruppe Multimedia (2001a)
[165] ARD/ZDF- Projektgruppe Multimedia (2001a)
[166] GFK AG (2001)

lowest rates. The contrasts are less wide as one would expect, however, given the difference in levels of wealth between the Spanish Autonomous Communities. Thus, the range in usage rates goes from 12.3 % in Castilla/Mancha to 26.6 % in Catalonia.[167]

2.2.4 France

In France the group of the Internet users in 1999 is characterised by an overrepresentation of people who are 33 years old or younger (55 % of the Internet users but only 31 % of the total population) in comparison to people 50 years old or older, who represent 41 % of the total population but only 13 % of the Internet users. Most of the Internet users have a higher social background (56 %), whereas this group represent only 22 % of the total population. 66 % of the Internet users are men .
In regard to Internet users and the areas they live in, people living in rural zones are underrepresented by an index of 69 (Base 100), while people living in big towns (>200 000 inhabitants) are over-represented by 107 and Internet users living in Paris even by 189.[168]

2.2.5 Italy

In Italy the Internet is also more diffused among young people. With a share of 59 % most Internet users in 2000 are 34 years old or younger (aged 25-34: 33 %) while people older than 44 only represent 22 % of the Internet users. The level of education seems to strongly influence the likelihood to be an Internet user. Only 13 % of the Internet users have an educational level of secondary school, while 67 % have an educational level of high school and 20 % of the Internet users have a university degree.[169]

2.2.6 Netherlands

In the Netherlands the users are on average aged between 25 and 54 in 2001, more likely to be from higher income households and with a higher level of education.[170]
The older the people, the less hours a week they use the Internet. Equally, there is a difference in intensity of Internet usage between men and women. 25 % of all women who use the Internet, spend three hours online. Amongst men, this percentage is 40 %. Most women spend less than one hour a week on Internet (38 %).[171]
Even in a small country like the Netherlands geographic variations exist in Internet usage. This is primarily due to differences in access and cost between regions. In the cities, Internet through cable is increasingly available. Analysis for 2000 shows that the percentage of people with access to the Internet is the highest in the north of Noord-Holland and ‘t Gooi while larger cities like The Hague, Rotterdam and Amsterdam are lagging behind. In the east, the

[167] Estudio General de Medios (2001), a privately funded national representative survey on media use among the population aged 14 and over and conducted every year (Sample size about 14,000 respondents).
[168] Médiamétrie-ISL (1er trimestre 97-4ème trimestre 1999) / site AFA
[169] I-LAB 2000
[170] NIPO Interactive (2001)
[171] Interview-NSS (2000)

southwest and the south east the Internet penetration is the lowest with less than 40 % of users, whereas the percentages of Internet users in Flevoland is higher that 55 %.[172]

2.2.7 United Kingdom

In the United Kingdom it is also still fair to say that age, gender, social and educational background are major factors influencing the likelihood of a UK citizen having access to the Internet, although patterns of use change rapidly.
When usage is broken down by gender in 2000 56 % of the Internet users are men. Correspondingly 47 % of women have used the Internet. In previous years the Internet was used more by men than by women in the UK, but use is gradually becoming more evenly distributed among the sexes.[173] National Statistics' findings are borne out by the results of Jupiter MMXI's 'UK at Home' survey in 2001 which found that 58 % of Internet users were male and 42 % female.
Regarding the social backgrounds of Internet users and non-users in the UK, research conducted by Research Surveys of Great Britain[174] in January 2001 shows that usage of information and communications technologies (excluding mobile phones) is relatively low for single parents, people who have difficulties with basic skills and disabled groups. Compared to the average of 44 %, use of the Internet among these groups is low at 36 %, 32 % and 28 % respectively. The study also found that those people living in ACORN categories "Council Estates, Greatest Hardship" and "Council Estates, High Unemployment" are unlikely to have ever used the Internet (34 % and 25 % respectively). This compares to 61 % among "Prosperous professionals", 60 % among "White collar workers" and 59 % among "Affluent Executives".
As for income and Internet use, National Statistics figures show that 'at the extreme, there is a greater than 60 % difference in the adoption rate between the lowest and highest income deciles'. The governmental Office of the e-Envoy admits that 'there is little evidence to suggest that the market will close this gap; in fact, if anything, the evidence over the past three years is that the gap is widening'[175].
It has been argued that education 'is a major factor in the diffusion of the Internet'[176], with a Fletcher Research survey conducted in March 2000 indicating that 40 % of Internet users have a degree compared to the national average of 12 %. Internet access also varies strikingly by geographical region; National Statistics data for the first quarter of 2000 shows that 25 % of homes in London had Internet access, compared with just 11 % of homes in Northern Ireland.

[172] Interview-NSS (2000)
[173] ational Statistic Omnibus Survey (July 2001)
[174] Russell / Drew (2001)
[175] UK Online annual report 2001
[176] Stewart in UK Online annual report 2001

2.3 Non-users

While the characteristics of Internet users - and therefore the characteristics of the non-users also - are relative well explored, the reasons for non-usage and barriers are hardly analysed. Data are only available for Germany and the United Kingdom.

In Germany the share of non-users who refuse more or less strictly to use the Internet (about 53 %) is much larger than the share of people who plan to access the Internet in the near future (about 10 %).[177]

Reasons of German non-users not to obtain an Internet access (2001)	
TV, radio and newspapers are sufficient sources of information	92 %
Neither need the Internet professionally nor privately	81 %
Have the possibility to ask other persons for an Internet access if necessary	73 %
Have no time for or don't feel like using the Internet	69 %
Have an Internet access through friends	58 %
Social contacts are neglected	53 %
The costs are too high	49 %
Internet usage can also be frustrating	38 %
Generally refuse the Internet	29 %
Don't believe I am able to use it	27 %
Source: ARD/ZDF-Projektgruppe Multimedia (2001b) /Note: respondents may give more than one answer.	

The figure below shows reasons given by UK adults who have never accessed the Internet for not doing so.

Reasons of British non-users for not using the Internet (2001)	
Lack of interest	42 %
No computer or access	26 %
No need	16 %
Lack of confidence/skills	16 %
Do not want to use it	11 %
Feels too old	9 %
Cannot afford it	7 %
Have not got round to it yet	6 %
No time	4 %
Poor opinion of the Internet	3 %
Health problems make it difficult	1 %
Other reasons	2 %
Source: National Statistics Omnibus Survey – July 2001 / Note: respondents may give more than one answer.	

Although the findings for Germany and the United Kingdom are not comparable directly, an interesting point can be observed for both countries. The reasons given most often by the respondents for not using the Internet or for not planning to obtain an Internet access are related to no need or a lack of interest in Internet. Reasons such as a lack of confidence/skills

[177] Emind@emnid (2001)

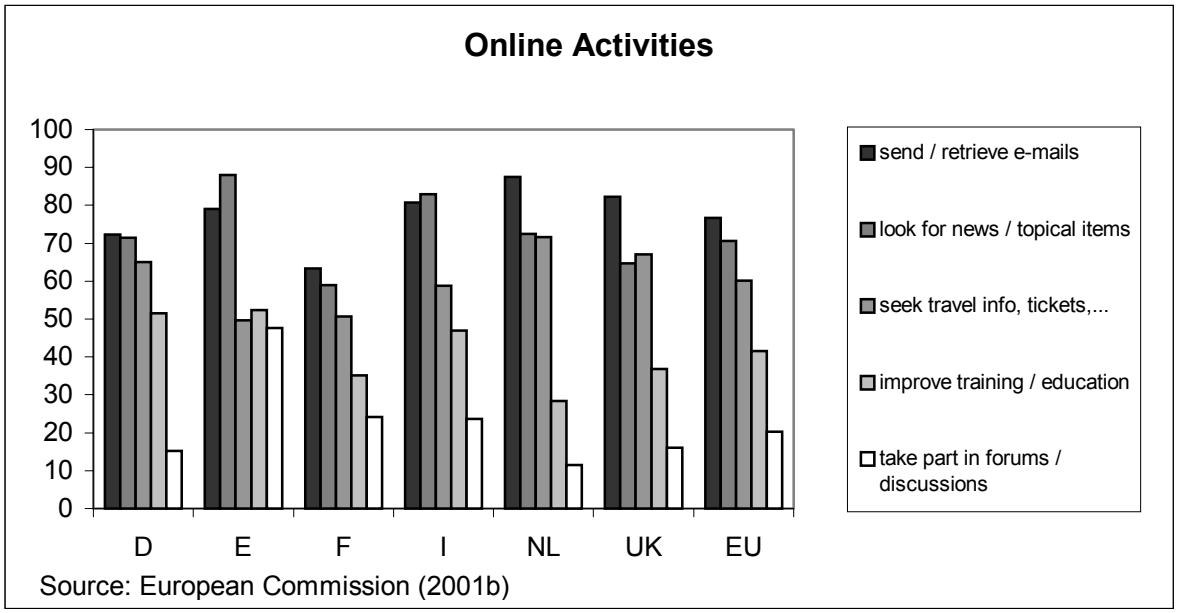
or financial resources seem to be less important than the cultural side of stratification. Taken into account the demographic profile of the non-users, this could indicate that the lower the formal educational level and the income, the lower is the interest in Internet usage. Such a tendency would pose a challenge to government policies in regard to "access for all" which mainly concentrate on improving the educational skills and lowering the access costs (see also *section 1.1*). Moreover, if a general lack of interest in Internet would be the main reason for non usage, different strategies against the digital divide would be necessary.

2.4 What is the Internet used for?

Within the scope of the Flash Eurobarometer 130.0, conducted 2001, Internet users were asked for what kind of activities they use the Internet for when they use it privately.[178] The findings for the countries of our study - except Switzerland - are listed below.

	D	E	F	I	NL	UK	EU
send / retrieve e-mails	72.3	79.1	63.3	80.7	87.5	82.3	76.7
look for news / topical items	71.4	88.0	59.0	82.9	72.5	64.7	70.6
seek travel info, tickets,...	65.0	49.6	50.6	58.8	71.6	67.0	60.2
improve training / education	51.5	52.3	35.1	46.9	28.3	36.8	41.5
seek health-related advice	37.5	32.4	19.4	35.4	45.0	38.0	33.5
online banking operations	28.9	18.5	20.2	14.4	35.1	28.7	26.4
find job ads.	31.7	28.7	26.9	20.8	31.2	29.9	28.3
book shows / events tickets	29.3	17.5	15.4	17.0	27.7	25.5	23.1
take part in forums / discussions	15.2	47.6	24.2	23.6	11.5	16.0	20.3
For other private use	2.5	0.7	3.9	2.3	4.6	1.1	2.7
Source: Flash Eurobarometer 103.0							

For a better view, the online services and functions used most often in the six countries and the use of functions that are especially interesting in regard to our project, are presented graphical below.



The Internet is primarily used as a medium of interaction and information. The most preferred offers are dealing with personal communication or information seeking. In Germany, France, the Netherlands and UK the Internet is used mostly to send and retrieve E-mails, followed by looking for news and topical items. Except for the UK, where seeking for travel information takes the second place. In Spain and Italy people use the Internet the most to look for news and topical items.

[178] European Commission (2001b)

In regard of our project, it is very interesting to compare the private use of the Internet for taking part in forums or discussions. Like in the other categories there are obvious differences between the countries. Only 11.5 % of the Dutch Internet users take part in online forums or discussions. In Germany (15.2 %) and the UK (16 %) the Internet is also little used as a platform for online forums or discussion. In Italy and France nearly one quarter of the Internet users take part in online forums and discussions. The Spaniards seem to be much more interested in online discussion than the people from the other countries of our study. With 47.6 % nearly half of the Spaniards take part in online forums or discussions.

In Switzerland e-mail is also by far the most popular service. 97 % of all Internet users in the German speaking part of Switzerland use electronic mail. 86 % of Swiss German Internet users utilize search engines – which makes them the second most popular service. Access to phonebooks and access to timetables of public transport and airplanes follow on the 3rd and 4th place with 75 % and 74 % respectively. Still 68 % use the possibilities of downloading programs. The following services take places 6 to 10 in the ranking: consulting (city-)maps and roadmaps (67 %), visiting homepages of friends (64 %), surfing online just for fun without any aim (64 %), sending SMS (61 %) and reading daily news (58 %).[179]

[179] WEMF AG für Werbemedienforschung (2001)

2.5 Political interest of Internet users

Hagen and Kamp (1999) explored the Internet usage of Germans with respect to political information and participation by analysing several surveys. In general they found out that Internet users are more open-minded and politically engaged persons with a higher innovation willingness than the average of the population. Nevertheless political online contents play a secondary role for most of the users. Only one fourth of the Internet users is using the offer of news or political information on the Internet.
The most demanded political information are not from political institutions or actors but from the conventional media. In this way the political information retrieved online derives from the traditional sources, the mass media. Thus, it seems to be doubtful if the Internet leads to an extended usage of information offered by the political actors themselves. In addition, the usage of the Internet for political information is usually not interactive, but mostly passive receptive - similar to the usage of the conventional media.
Taken together Hagen and Kamp (1999) confirm such voices, which are sceptical in regard of an increasing political participation because of the possibilities offered by the Internet.

Concerning an averagely higher political interest of Internet users in comparison to non-users, several surveys indicate similar results. For example Vowe and Emmer presented the first findings of their empirical research of the individual online usage in the political context at the "Jahrestagung der Deutschen Gesellschaft für Publizistik- und Kommunikationswissenschaft" in 2001.[180]
The political participation of the respondents was measured by several questions, for example the visit of party conventions (generally / in the last week / before the last elections) or whether the person spoke to a politician or ordered political information brochures.
The results show that in general, German Internet users are more politically active than people who do not use the Internet. They use the conventional participation possibilities more often than non-users and additionally, they use the possibilities of participation offered by the Internet. 11.4 % of the Internet users ordered political information brochures at least once. In comparison, only 4.7 % of the non-users did so. 6.4 % of the Internet users ordered the material in the conventional way and 4.4 % used the Internet. 0.6 % of the Internet users used both possibilities of ordering.
A difference can also be noticed in regard of letters to the editor. The share of the Internet users is higher than the one of the non-users. 8.4 % of the non-users and 10.1 % of the users wrote a letter to the editor in the conventional way at least once. 27.4 % of the letters sent to the editor by Internet users were sent electronically.
The authors raise the question if the stronger political engagement is caused by the Internet. They assume that Internet usage is not as important for political participation as the general political interest of a person. However, Internet usage is a self-contained factor which lowers the costs of participation (an e-mail is less work and cheaper than a letter) and provides more effective forms of political participation. At least, the respondents have the impression that the Internet makes it possible to speak to the politicians more directly and that it is easier to find like-minded people concerning a specific request.

In a similar way, first empirical surveys in Italy show that "the Internet doesn't produce a growth of the quota of interested subjects to the political dimension, but it fixes and it strengthens a preexisting interest".[181]

[180] Steger (2001)
[181] Bentivegna (1999: 98)

A survey conducted by Fiore on a sample of 100 people who take part in political newsgroups shows higher rates of political participation, both in conventional forms and in unconventional ones (see figure below).[182]

Political participation of newsgroups users compared with the Italian population		
	Newsgroups Users	**Italian Population**
Communication (talking about politics, watching political programs on television,…)	86.3 %	67.5 %
Participation in assemblies, demonstrations, etc.	29.4 %	11.7 %
Activism (non-paid activities for political parties)	45.1 %	1.5 %
Source: Bentivegna (1999:121)		

The same survey indicates that people participate in newsgroups above all to satisfy expressive needs, more than to persuade or to recruit other people. 26.1 % of the sample affirm to participate in newsgroups to express their own opinion on specific issues, 25.2 % want to compare their own position with that of others, 20.4 % participate in order to know what other people think.[183]

Although there are no empirical findings for the other countries of our study it can be assumed that there as well, the Internet usage itself does not result automatically in a stronger interest in politics or political communication and participation. But it seems reasonable that the possibilities offered online may strengthen and deepen an already existing interest. Another point is that it is not surprising that Internet users seem to have an averagely higher level of political interest when the demographical structure of the common Internet users discussed in part two is taken into account.

[182] Bentivegna (1999)
[183] Bentivegna (1999: 122)

3 Internet strategies of political actors

Many general papers and articles have been written about the potential (and risks) the Internet may offer as a new arena for political communication. The Internet is often characterized as a medium which enables collective actors to use new forms of communication, mobilisation, participation and interaction. Taking into account these potentials attributed to the Internet it is all the more surprising that only few studies have been done on the actual usage of the Internet by these actors. Those that have been carried out often suffer from a lack of empirical data.
In the following we will give an overview of available information on the Internet performance and strategies of relevant collective actors in the seven countries of our study. While this section is surely not an exhaustive representation of the whole field of research, it wants to give a general impression of the recently most examined areas and of those which are particularly under-researched.

Before looking at different political actors separately we want to start with one of the rare surveys which compare the Internet strategies of different actors empirically. Although this survey only analyses the Internet strategies of political actors in Germany, it may provide an interesting insight into this kind of research in general.

The international provider of management and technology consulting services and solutions "Accenture" and the online policy magazine "Politik-digital" (2001) investigated about 300 websites of political actors in Germany in regard to the business models they are based on.[184] Business models known from eCommerce were transferred to political online communication. The often cited definition of a business model by Tom Malone (Massachusetts Institute of Technology) "What a company does and how it makes money" turns into "What a political player does and how he gains support."[185]

The intention of the different models transferred to political online offers are described in the following:[186]

- The model of *Marketplaces* distinguishes two forms: Vertical Marketplaces and Horizontal Marketplaces. In the business world *Vertical Marketplaces* are specialized in a certain industry or product. In the political sphere this model focuses on a policy field or a subject area. Thus Vertical Marketplaces are motivated thematically. They are politically independent and have flexible structures, which may include different forms: from a loose network to an influential lobby group. Vertical Marketplaces can also (or additionally) be aimed to demarcate a political ideology. In this case they are politically dependent. In both cases the aim is the bundling of political interests. The bundling can be used to demonstrate an increased demand on a specific issue to effect adequate reactions by politicians. It can also be an aim to bundle the interests to secure and extend the permanent demand for political ideas.
  Horizontal Marketplaces are specialized in business processes, services or goods which are not limited to a certain industry. In the political world, this model is used to offer services or information that are not devoted to a certain policy field or ideology but to all

[184] Accenture / Politik-digital (2001)
[185] Accenture / Politik-digital (2001: 4)
[186] The models of Portal, Auction/Reverse Auction and Collaborative Workflow are excluded because they are still playing a marginal role in regard to political online offers in Germany. For further information see: Accenture / Politik-digital (2001: 20)

kinds of aspects of a political issue. This is mainly what agencies do when they are specialized in political marketing and especially in online marketing of political institutions.

- *Direct Commerce* provides a direct dialogue between the actors participating in the political process. The advantages are that the communication with citizens, voters or members is immediate and can possibly be transformed in a direct form of influence or an immediate support. A weak point of this model is that it is not in line with the individual needs of the citizens. It counts on the vision that the interest in the political actor itself is a sufficient reason to visit his website.

- The *Catalogue Aggregator* is a non valuing compilation of political information on a broad range of issues. The objective is to make the political market more transparent for the citizens in an intermediary way (e.g. media online offers). Problems may occur if the online offer is competing with a corresponding offline product. The so called "channel conflict" can cause that one offer lowers the market share of the other product.

- Political *Exchange* is used to bring political offers and potential voters together. The Exchange offers the opportunity for citizens to take a stand on certain topics. This is often used within the model of a Vertical Marketplace or as a complement to Direct Commerce. Political Exchanges are characterized by conducting votes on specific topics or petitions in real-time. However, the carriers of the websites often don't specify if the results will directly influence the decision.

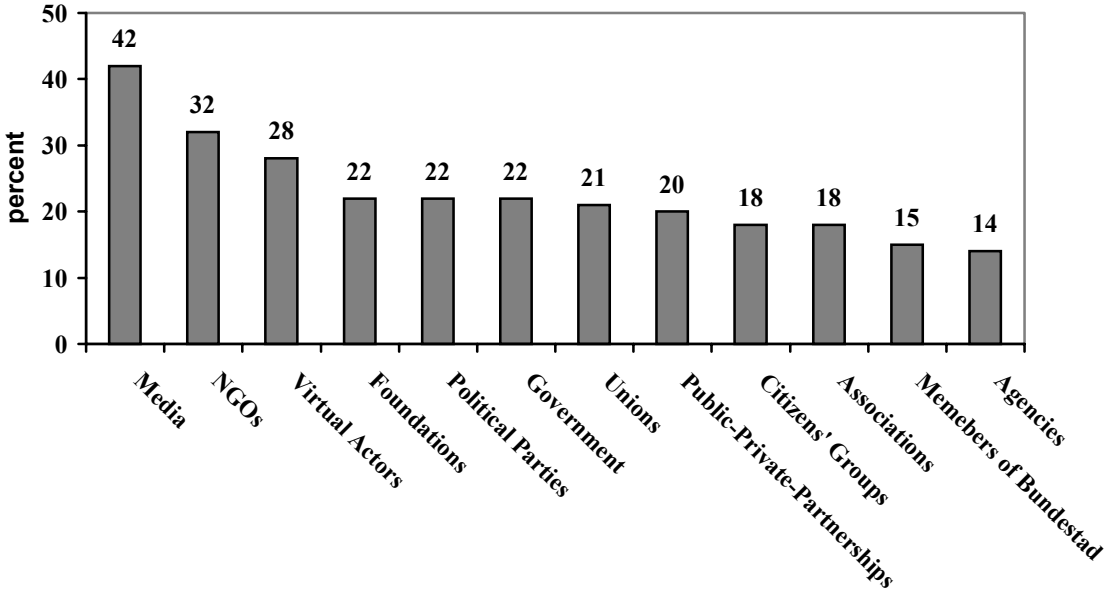
In regard of interpreting the results it has to be taken into account that the websites of political actors can include several of the presented models.
The results show that 81 % of the examined groups use the model of Vertical Marketplace within their Internet performance. The NGOs rest upon the model solely and among foundations it is also widely spread with 90 %. All citizens' groups and public-private-partnerships base their online performance on this model and 84 % of the associations do so.
As mentioned above the model of Horizontal Marketplace is mainly used by agencies, which are specialized in political marketing. The difference is that these actors do not aim for a direct benefit but want to acquire potential customers.
Direct Commerce is primary used by the traditional political actors like governmental institutions, members of the Bundestag, political parties or unions. These groups count on the direct commerce of their issues and personnel in 90 % of the cases.
The Media mainly use the model of Catalogue Aggregator. The other political actors are often more interested in claiming a certain issue or mobilizing support than providing a neutral forum for different issues and points of view.
Only 5 % of the political actors in Germany use the Exchange model within their online performance. However, the appropriate functions such as online voting or petitions are used by a quarter of the NGOs and citizens' groups.

"Accenture" and "Politik-digital" explored in addition the Costumer-Relationship-Management (CRM) at the websites of the analysed political actors. The CRM is known from eCommerce. The intention was to rate the stage of maturity concerning the costumer relationship on the websites. The CRM Capability Model of Accenture is based on three central features which constitute the CRM-value:

1. Level of Customer Insights (knowledge about the costumer)
2. Level of Customer Offer (custom-made offers)
3. Level of Costumer Interaction

Correspondingly, it was analysed to what extent possibilities, like personalizing web offers, sending newsletters, cookies, chats, discussion forums or online voting, are used on the websites. In addition, the usage of interactive contact possibilities was taken into account.

Absolute CRM-Values of the political actors IT-performance (maximum = 100%)



Source: Accenture/Politik-digital (2001: 25)

As shown above "Accenture" and "Politik-digital" found out that in Germany only a few of the political actors take advantage of all the possibilities and potentials the Internet offers. Innovative forms of political communication are hard to find and online relationships to the citizens are in their very beginnings. At the moment "one-way" communication dominates and a web-based interactive communication hardly exists.
The possibilities of CRM are mainly used by the media. They use 42 % of the CRM possibilities. NGOs and virtual actors use these possibilities both by about 30 %. Political parties, government, public-private-partnerships, citizens´ groups, unions and associations only use about a fifth of the actual possibilities. Finally members of the Bundestag use only 15 % of the possible CRM features and agencies do so only by 14 %.
In regard to the single factor Customer Interaction, the media also reached the highest score with about 50 %, followed by the virtual actors. The government, unions, members of the Bundestag, foundations, political parties, citizens' groups, associations an private-public-partnerships use the instruments of costumer interaction by between 35 % and 45 %. NGOs (about 25 %) and the Agencies (about 10 %) use the features of costumer interaction the least.

After this example of a survey which compares different political actors in regard to their Internet strategies we now turn to studies which concentrate on single groups of actors. The following section is structured along different groups of collective actors and not along the situation in each of our countries.

3.1 The Media

Generally the traditional mass media still play the most important role for the citizens in regard to political information. As an example, the findings of Eurobarometer 55 show that in all of our seven countries television is the most important source of information about the EU in 2001, with the share ranging from 74 % in Germany to 53 % in the UK. In Germany, Italy, Netherlands and UK the second important source are daily newspapers followed by radio. The French use daily newspapers and radio to the same extent while the Spaniards prefer radio to daily newspapers when they look for information about the EU.
In all countries, people receive information about the EU more often from discussions with relatives, friends or colleagues than from the Internet.The Germans, Spaniards and French even more often use books, brochures or information leaflets than the Internet.
The use of the Internet to look for information about the EU, ranges between 6 % in Spain and 16 % in the Netherlands. While it is unsurprising that in the Netherlands the Internet is used more often as source for information about the EU than in the other countries – taking into account the generally higher level of Internet use of the Dutch population - the results for Italy are interesting. Although the Internet use is the lowest in Italy compared with the other countries, Italians use the Internet more often when looking for information about the EU than the French, Germans and Spaniards.[187]

Source of information about the European Union in percent (2001)						
	DE	**E**	**F**	**IT**	**NL**	**UK**
Television	74	67	62	74	69	53
Daily newspaper	59	33	34	48	56	35
Radio	43	37	34	17	33	23
Discussions with relatives, friends, colleagues	22	14	27	20	24	10
Other newspapers, magazines	20	10	16	26	20	9
Internet	**9**	**6**	**10**	**12**	**16**	**14**
Books, brochures, information leaflets	11	10	12	11	12	9
Never look for such information / not interested	6	11	15	6	11	16
Source: European Commission (2001a)						

In summary these results show that the Internet is still playing a secondary role as a source of political information, at least in the case of information about the EU.

Besides the general role the Internet plays in comparison with other media concerning political information and communication, it is a central aim of this section to demonstrate Internet strategies of the media on the basis of secondary information.
The increasing Internet penetration offers the possibility to the media to digitise their business deals completely: contact, conclusion of agreements, provision of the goods and settlement of accounts. In this respect Hess and Schumann (2001) distinguish four levels of Internet use by the media industry:[188]

[187] European Commission (2001a)
[188] Hess/Schuhmann (2001)

1) Product selling: usage of the Internet as an additional sales channel without changing the original product

2) Product completion: systematic completion of the origin product (e.g. newspapers or telecast) with an Internet offer. The primary objective is a functional supplementing of the classic product by background information. Sometimes the Internet is also used as a possibility to sell supplement products or to pass on the customers to the offer of other firms.

3) Digitised products: Already introduced products can be offered additionally online, such as some newspapers which have begun to represent the classified advertisements of its print issue also online.

4) Acquiring of new business fields: At this fourth level of Internet usage by media firms the aim is to acquire new business fields. An example of such a strategy are search engines on the Internet, which help the user with finding relevant information. Content syndication has also started to play a more and more important role, which means multiple use of content. A once produced content can be offered in different forms and on different media.

Apart from digitalisation, individualization plays a central role. In this context individualization means that the products which are originally designed for a mass market can be offered to the customer according to their specific wishes, e.g. newsletters which inform the customer by e-mail about the latest news in their fields of interest.

On the "Beyond the Printed World" conference in October 2001, the advantages the Internet offers to media firms and how these can be used were the central issues. At the meeting, which was organized by the IFRA (INCA-FIEJ Research Association), the World Association of Newspapers (WAN) and the International Federation of the Periodical Press (FIPP), many online business concepts were presented: content against payment, Premium-category-advertisement services and other new forms of advertising. Much attention was given to Cross-Media-Models, in which different media of a firm support each other, or new media - such as the mobile phone - serve as a connection between the newspaper and its readers.
The "Bundesverband Deutscher Zeitungsverleger e.V." summarizes that the conference has shown that newspapers primarily experiment with paid content. These need to be communicated in an intensive way, if the newspapers want to have a real chance to earn money with these digital concepts.[189]

In regard to the situation in the seven countries of our study, the available information on media Internet strategies is very limited. Particularly in regard to the media's role in political online communication the media use of the Internet is an under-researched area which would benefit from systematic analyses of how and why different media incorporate the Internet into their business strategy and the societal implications of doing so. From what little information exists, it is clear that increasing use of the Internet as an output medium by different sectors of the media has caused the traditionally clear distinctions between different media formats to become blurred. But the implications of this development concerning the role of media on the Internet as a new forum of political communication are still under-researched; on the national level and especially on the European level.

[189] Bundesverband Deutscher Zeitungsverleger. The document is available at http://bdzv.de/

3.1.1 Switzerland

In Switzerland print media as well as electronic media conquered the Internet offering their own websites since the middle of the 1990s. By 2000 about three fourth of all Swiss radio stations were online as well as 18 TV stations nationwide.[190] An even higher presence online can be observed concerning print media: almost all Swiss publishing companies are represented on the Internet. [191]
During a first phase especially print media declared being online essentially for commercial reasons. As Wanner describes, radio stations – during a first period also present on the Internet for commercial reasons – renounced very quickly from such a strategy. Ideally, as experience showed, a radio website had to be as close as possible to the appearance "on air". The fact that traditional boundaries between different types of media continue to persist strongly indicates that specialists of traditional media perceive Internet not so much as a new medium but rather as a new means of diffusion, an additional channel.[192]

In Switzerland, 45 % of the Internet users who use the Internet at least several times per week use the Internet to access the online offer of newspapers and magazines in the second half of 2001. [193]

SWITZERLAND: Use of online content of newspapers and magazines (%)							
Wave 1/98	**Wave 2/98**	**Wave 1/99**	**Wave 2/99**	**Wave 1/00**	**Wave 2/00**	**Wave 1/01**	**Wave 2/01**
43.9	46.1	48.4	48.7	49	50.3	47.3	45.0
Source: Federal Statistical Office (2001)							

It is interesting that there seems to be a decline in the share of Internet users who use online content of newspapers and magazines over the last years. While the share of users increased from the first half of 1998 to the second half of 2000 the share declined some what in 2001. If that represents a trend or just a kind of oscillation cannot be decided on this data.

There are no specific data about the number of visitors of electronic newspapers and magazines available in Switzerland. But looking at the most popular websites in 2001 listed below it becomes clear that the use of media websites – and especially newspapers – is relative wide spread in Switzerland. There are three German Swiss newspapers among the ten most popular websites: "Blick", "Tagesanzeiger" and "Neue Züricher Zeitung (NZZ)".

[190] Wanner Christine (2000: 2)
[191] Schweizer Revue
[192] Wanner Christine (2000: 2)
[193] Federal Statistical Office (2001: 7)

SWITZERLAND: Most popular websites in Switzerland – top 10 (2001)		
Website (URL without www)		**Total of users [194]**
1	Bluewin.ch, bluewindow.ch, bluewin.com	755 000
2	search.ch	545 000
3	search.bluewin.ch, sear.ch	237 000
4	**blick.ch**	**216 000**
5	tel.search.ch	206 000
6	swissonline.ch	204 000
7	**tages-anzeiger.ch, tagesanzeiger.ch, tagi.ch, tagesanzeiger.com, tages-anzeiger.com**	**137 000**
8	**nzz.ch, nzz.com**	136 000
9	etv.ch	132 000
10	swisstalk.ch, swisstalk.com	107 000
Source: WEMF AG (2001: 3) Newspapers analysed in the Europub project are **bold**.		

3.1.2 Germany

In Germany, 48 % of the Internet users visited at least once the website of a television channel. Newspaper online offers were used by 42 % of the Internet users. 26 % of the people who use the Internet visited at least once the homepage of a radio station in 2001.
Asked about what kind of information the users are interested in when they visit the websites of television and radio stations, the four most important are news (48 %), information on travelling (45 %), news about Germany and foreign countries (43 %) and consumer information (41 %).[195]

In regard of the usage of websites of the traditional print media, the online service of news magazines and regional newspapers are the ones visited most. Computer magazines are read more often online than nation wide papers. Still the nation-wide papers play a much more important role than the tabloids and TV programme guides.

GERMANY: Usage of print media online offers (%)	
Newspaper/magazines in general	42
News magazine	29
Regional newspaper	26
Computer magazine	21
Nationwide newspaper	18
Tabloid	7
TV programme guide	8
Source: ARD/ZDF-Online Survey 2001 / ARD/ZDF- Projektgruppe (2001c)	

Some of the German newspapers refused for a long time to offer an online edition. They were afraid of the so called "channel conflict", which may occur if an offline product is competing

[194] Total of Swiss German Internet users aged 14 and above using the website daily, almost daily, several times a week or approximately once a week. (enger Nutzerkreis)
[195] ARD/ZDF-Projektgruppe Multimedia (2001a: 393, 394)

with the corresponding online product. To avoid a decrease of the circulation of the print issue, nationwide newspapers like the "Die Welt", "Bild" or the "Süddeutsche Zeitung" only provide a reduced version of the printed issue on the Internet. In contrast, the newsmagazines "Spiegel" and "Focus" offer on their websites supplementary services, by which they are reaching additional target groups.[196]

The visits and page impressions of some of the well-known German nationwide newspaper in December 2001 are listed below. Visits count the external visitors of a website. Page impressions provide a measure of the use of single sites within an online offer. The page impression measurements are always higher than the counted visits of a website and provide a kind of intensity measure of the visits.[197]

GERMANY: Nationwide newspaper websites (December 2001)		
Newspaper	**Visits**	**Page Impressions**
Bild.de	**13 297 382**	**71 881 479**
Sueddeutsche.de	**3 821 657**	**12 016 831**
Welt online	3 691 030	11 796 729
Handelsblatt.com	2 032 659	7 310 891
FAZ.net	**1 707 886**	**7 314 813**
Frankfurter Rundschau	654 796	2 756 076
Taz, die Tageszeitung	603 948	2 407 254
Source: IVE (Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern e. V.), at: http://www.ivw.de/data/index.html Newspapers analysed in the Europub project in bold type		

3.1.3 Spain

In Spain, Internet lags well behind in comparison to the use of other media. TV, magazines, and radio are still the dominant media in the Spanish market. The tremendous growth in use of the past few years is reflected, however, in the fact that in year 2000, the percentage of Internet users was already as high as that of moviegoers (12.6% and 11.0% respectively).

SPAIN: Usage of different media		
Media/Year	**1996**	**2000**
Newspapers	38.2	36.3
Magazines	55.6	53.6
Total Radio	56.6	52.9
TV	91.3	89.2
Cinema	9.3	11.0
Internet	1.0	12.6
Source: Estudio General de Medios (2001)		

There is little information about the Internet strategies of the Spanish media available. The data from the Estudio General de Medios listed below show the use of various newspaper

[196] Accencure / Politik-digita.de (2001)
[197] Bieber (1999: 45)

Internet pages in Spain. The data refer to usage in the past 30 days with October/November 2001 as the reference period. As the reader can see, El País is by far the newspaper web site with the largest number of users. The other newspapers whose content we analyse in the context of our project, El Mundo, La Vanguardia, and ABC, have also highly visited sites. Marca, the third most often read newspaper online is the most important sports newspaper in Spain. This may be due to the fact that Spaniards read sports newspapers instead of tabloids. Sport, As, and Mundo Deportivo are sports newspapers as well.

SPAIN: Users of Newspaper Internet Pages Oct/Nov, 2001 (Users in the past 30 days)	
Newspaper	**Users**
El País	**1 101 000**
El Mundo	**584 000**
Marca	475 000
La Vanguardia	**216 000**
ABC	**164 000**
Expansión	128 000
El Periódico	111 000
Sport	71 000
As	67 000
El Correo Digital	59 000
El Mundo Deportivo	59 000
Cinco Días	53 000
La Estrella Digital	50 000
La Nueva España	43 000
Diario Vasco	41 000
Source: Estudio General de Medios (2001) Newspapers analysed in the Europub project in bold type	

3.1.4 France

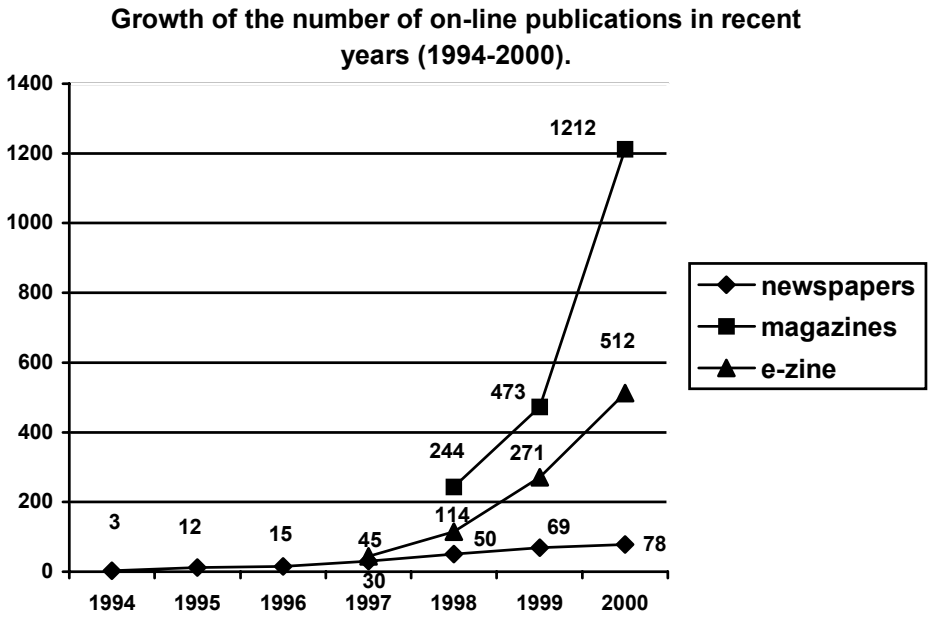
In regard of the French media and the Internet there are only data on the visitors of news media web sites available. The table below includes visitors of different media websites and not only those who visited online newspapers.

FRANCE: Number of visitors of news media web sites in July 2001		
Media		**Visitors**
TF1	Television	5 902 710
Le Monde	Broadsheet	**5 175 691**
Canal numedia	Pay per view television	2 800 464
Libération	Broadsheet	2 490 600
France-Televisions	Public Broadcasting Television	1 596 054
Radiofrance	Public Broadcasting Radio	1 182 262
Le Figaro.com	Broadsheet	**1 082 191**
Groupe NouvelObs	Weekly news magazine	900 004
Leparisien.com	Parisian daily (with a national edition: *Aujourd'hui*)	853 145
Le monde diplomatique	Monthly newspaper (specialised in International news).	447 997
L'Express	Weekly news magazine.	383 538
Courrier international	Weekly news magazine (mainly translations from foreign newspapers).	300 954
Source: Cybermétrie, Février 2002 Newspapers analysed in the Europub project in bold type		

The online offers of television stations and daily newspapers seem to be the most often used media websites in France.The by far most often visited media websites are the online offer of the television station TF1 and the website of the centre/left-wing newspaper "Le Monde". The pay per view television station "Canal numedia" is the third most often used media website, followed by the left-wing newspaper "Liberation". "Le Figaro" (centre/right) is read online less than half as often as the two other newspapers ("Le Monde" and " Liberation"), that are analysed in the Europub project.

3.1.5 Italy

In Italy the presence of newspapers on the Internet has dramatically risen in recent years. It passed from three online newspapers in 1994 to 78 in 2000. Between 1995 and 1996 the main Italian newspapers activated their web sites and their online editions. In 1997/98 the first e-zines (electronic magazine) were created. E-zines are online magazines without a corresponding offline edition. In the same year, the main press agencies (Reuters, Associated Press, Ansa, Adnkronos, Asca) realized their own websites. In 1998/99 those web-sites are no longer advertising showcases for print products and start to provide original contents. In the same year websites of the newscasts were created, too.
Nevertheless, in 1999 only three newspapers (La Repubblica, La Gazetta dello Sport, Il Sole-24 Ore) had promoted on the web a significant differentiation from the print version. As a matter of fact, the greatest part of newspapers (around 60% of the most important) and magazines was present on the web, but in a lot of cases their web presence was limited to a simple transposition - total or partial - of the print edition.



Starting from the beginning of 2002 the web-site of "La Repubblica" demands a paid subscription to the users interested in reading online the print edition of the newspaper and in consulting its archive. Since the percentage of people reading newspapers in Italy is not high in comparison with others European countries, this is a very remarkable experiment.

For Italy the figure below shows the audience of Internet users reached by the most important Italian newspapers and press agencies. It is interesting to notice that the ranking of online edition of Italian newspapers is different from the ranking of print editions (note that "La Repubblica" is the 2nd Italian newspaper and "Il Corriere della Sera" is the 1st). Readers of online newspapers and magazines have been estimated in 38.2 % (3 250 000 users) of all Internet users.

ITALY: Reach of the main on-line newspapers and press agencies (April 2000)

Newspapers and press-agencies	URL	Users	%
La Repubblica	**www.larepubblica.it**	**1 138 000**	**33.5**
Il Sole24Ore	www.ilsole24ore.it	1 052 000	31.0
Il Corriere della Sera	**www.corriere.it**	**570 000**	**16.8**
Milano Finanza	www.milanofinanza.it	211 000	6.2
La Stampa	www.lastampa.it	155 000	4.6
La Gazzetta dello Sport	www.gazzetta.it	152 000	4.5
Ansa	www.ansa.it	109 000	3.2
AdnKronos	www.adnkronos.it	85 000	2.5
AGI	www.agenziaitalia.it	16 000	0.5
Asca	www.asca.it	15 000	0.5
Others		984 000	29.0

Source: Between, Speciale per Prima Comunicazione, April 2000.
Newspapers analysed in the Europub project in bold type

3.1.6 Netherlands

In the Netherlands the Board of Directors of PCM, the biggest publisher of newspapers in the Netherlands who produces amongst others "de Volkskrant", "Algemeen dagblad", "NRC Handelsblad" and "Trouw" announced in September 2001 to limit its Internet activities. Due to a lack of advertisers the activities were no longer profitable. The department for interactive media would be closed and the Internet services would be limited to a kind of teletext.[198]

The sites of three of the four Dutch newspapers that we analyse in the Europub project contain about the same information.[199] They all have actual news, dossiers, discussions and polls. The difference between the sites is the focus of the news. In the "left"-leaning newspaper "de Volkskrant" (http://www.volkskrant.nl/), the focus is on actual politics and world news. The "right"-leaning paper "Algemeen Dagblad" (http://www.ad.nl/) focuses on national politics and sports. The tabloid "de Telegraaf" (http://www.telegraaf.nl/) focuses on sports immediately.

There are few websites which combine media and television. The ones we found contain discussions and/or dossiers. There is also actual news on these sites. There is a small difference in focus between the public broadcasting companies and the commercial ones.
The sites "http://www.omroep.nl/nos/noshome" and "http://www.rll.nl/actueel" provide actual news. Sites like "http://www.omroep.nl/vara/buitenhof" and "http://www.vpro.nl/ programma/buitenhof" provide discussions, polls and dossiers. The most extensive news site is "http://www.novatv.nl." NOVA is a program with background news. There are opinions, dossiers, the latest broadcast, topics of the upcoming program and discussions about recent news. They also deliver the site http://www.politiekebarometer.nl/ The *politieke barometer* contains the latest polls for the national elections. It is an initiative of the television programme *NOVA*.

3.1.7 United Kingdom

In the United Kingdom all major UK media outlets have websites, but these are of varying quality and offer different opportunities for online participation. In general, media actors' Internet strategies are largely employed in order to provide a value-added service. They include:

- Maximising content via search facilities, archives, and specialist/in depth reports; this facility encourages professionals to incorporate the news site into their work tasks
- Ability to provide up to date content not constrained by print schedules or broadcasting schedules
- Interactivity & potential for reader participation through discussion fora, notice boards, and emailing (the *Guardian* newspaper site has even created a virtual community that encourages people to contact each other through an interactivity feature in its bookselling service)
- Access to the news production process through the opportunity to submit news stories; some news sites, for instance *The Sun*, encourage users to submit potential news stories through the site.

[198] de Volkskrant, 'PCM draait geldkraan voor Internet dicht', 7-9-2001
[199] the fourth newspaper is "De Limburger", which is a regional paper

Further examples of these strategies can be found in a report by the government Department for Culture, Media and Sport available on their website[200].
When Internet activities of British media are broken down by sector, the following patterns emerge:

- *Regional newspapers*: the DTI-funded Sector Challenge programme carried out a detailed study of UK regional newspapers' non-print activities. Of the sample, which represented a third of UK regional and local newspapers, 83 % already had a website and remaining 17 % aimed to have a web presence within the next three years[201]. The report pointed out that regional newspapers recognised the urgent need to develop their own websites due to the threat of losing up to 75 % of their classified advertising revenue to other newspapers with a web presence.

- *National newspapers*: the UK's national newspapers all have some level of web presence. Their strategies for generating revenue from online editions are based on advertising, sponsorship and electronic commerce rather than 'cover prices'. Generally newspapers are now able to update news content on a minute-by-minute basis, a development which in effect shifts their news provision role closer to that of radio and television.

- *Radio*: the strategy of many radio broadcasters has been to develop multimedia sites that encourage an interactive experience and promote participation rather than passive listening.

- *TV*: each of the UK's major television news providers (BBC, ITN, Channel 4, Sky) has developed a comprehensive website. The BBC site provides access to both radio and television news, and allows users to listen or watch live online. The site also provides a host of additional resources to compliment the BBC's standard programming, ranging from educational resources through to in-depth reports to online discussion forums and opportunities to chat with guests from TV & radio programmes after transmission. The ITN site was originally established to deliver a website for the 1997 UK General Election, and claims to have one of the worlds largest on line archives of news items.

Some investigation has been carried out into media actors' Internet coverage of the 2001 election. Coleman (2001) argues that this was 'the first UK election in which traditional media coverage moved online'[202]. While in the 1997 election no national newspaper or broadcaster ran an online election service of any sophistication, by 2001 every major broadcaster and broadsheet newspaper had an online presence. Interestingly, the UK tabloids 'remained resolutely offline' as regards election service, although all have now developed some kind of limited web presence. The online election sites from the media were highly successful, particularly the BBC's *Vote 2001* service and the *Guardian* Politics presence, with the former site clocking up an average of half a million page views on each day of the campaign. Coleman concludes that none of the sites constituted attempts to replace traditional broadcast media or press, but all 'supplanted the old media in ways that helped to make the election more direct, accessible and meaningful for significant numbers of people'.

[200] http://www.culture.gov.uk/creative
[201] Department for Culture, Media and Sport (2000)
[202] Coleman in Department for Culture, Media and Sport (2000)

3.2 Government

This section is devoted to available information on the Internet performance of governments on the national and the EU level. In a first step we refer to some comparative findings in regard to the countries of our survey. In a second step we concentrate on the strategy of the Europa website run by the European Commission and its usage by the European citizen.

3.2.1 National level

Politics Online and the Amsterdam-Maastricht Summer University rated politicians and government websites of the EU member states in a "Comparative National Internet Intelligence Test" in 2000 and 2001.[203] The study is about making information available to the average citizen. Therefore a group of 20 average Internet users evaluated these sites according to criteria such as e-mail address, response to emails (promptness, automatic/personalized), information about future activities, updates, policy description, foreign language introductions, orientation system, use of latest technology, registration with search engines, etc.
Each government website was evaluated on four specific criteria with a maximum score of 25 points in each category. 100 points are the total maximum for all four categories in each country. Below, the findings for the countries of our project are listed, except for Switzerland, which as a Non-EU member state was not included.

Results of government Internet Intelligence 2001 (2000)

Country	Prime Minister	Ministry 1 (econ.)	Ministry 2 (social.)	Parliament	Total Grade
UK	**23** (20*)	**16** (20)	**19** (15)	**21** (18)	**79** (73)
Netherlands	**15** (15)	**17** (17)	**15** (15)	**18** (18)	**65** (65)
France	**15** (19)	**18** (11)	**10** (13)	**20** (20)	**63** (63)
Italy	**18** (19)	**15** (13)	**15** (9)	**15** (20)	**63** (61)
Germany	**12** (10)	**18** (13)	**12** (20)	**17** (18)	**57** (61)
Spain	**3** (10)	**10** (12)	**10** (14)	**10** (14)	**33** (50)
Cross-National Average**	**16** (15)	**16** (14)	**14** (13)	**16** (15)	**62** (57)

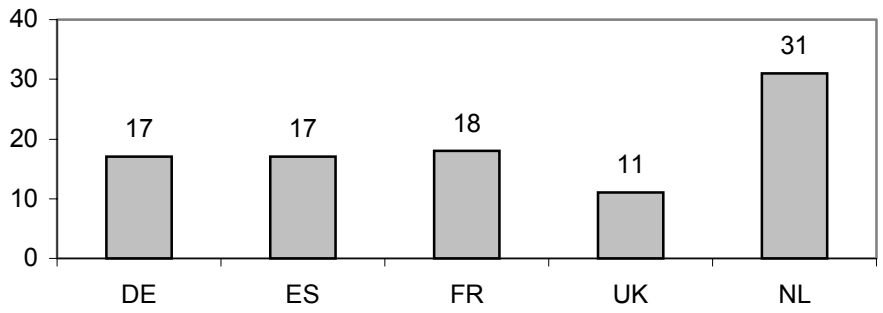
*figures in brackets refer to 2000, ** includes all EU member states
Source: http://www.politicsonline.com/specialreports/010803/eusurvey2001.asp

In 2001, four of our countries are above average. Spain displays the worst overall performance among the countries of our study and also in comparisons with all EU member states.[204] The UK finishes on top within the group of our countries. In the overall EU, the UK is placed second to Ireland, which has a total grade of 81.

[203] Reports are available for 2001 at http://www.politicsonline.com/specialreports/010803/eusurvey2001.asp and for 2000 at http://www.politicsonline.com/specialreports/000808/new_eusurvey.asp
[204] The results for all EU member states are available at http://www.politicsonline.com/specialreports/010803/eusurvey2001.asp

Since the eGovernment strategies of the countries of our study have been already discussed in section 1, we only present a short overview of the usage of such offers by the citizenry here. Taylor Nelson Sofres (TNS) conducted a survey in July and September 2001 on the use of online government services in 27 countries.[205] In the following we will concentrate on the countries of our study, of which the TNS survey only includes Germany, Spain, France, Netherlands and partly Great Britain.

Level of Government Online Use in 2001
(Percentage of population who used online services in the past twelve months)



Source: Taylor Nelon Sofres (2001a)

As seen above the Netherlands has by far the highest level of government online use in comparison to the other countries of our study. In international perspective the Netherlands belong to the group of countries with a high penetration of Government Online use. Germany, France and Spain have a medium penetration of government online use as shown in the chart below. Great Britain belongs to the group of countries which have a low penetration of Government Online use. Which stands in interesting contrast to the results about the high Internet use in UK (see section 2.1) and the good quality of government websites discussed above.

Level of Government online use in 2001		
Low Penetration (less than 15 % are users)	**Medium penetration** (15 % to 30 % are users)	**High Penetration** (more than 30 % are users)
• Indonesia (3 %) • Russian Federation (3 %) • Turkey (3 %) • Poland (5 %) • Lithuania (5 %) • Slovakia (8 %) • Latvia (8 %) • Malysia (11 %) • **Great Britain** (11 %)	• Korea (16 %) • Japan (17 %) • **Germany** (17 %) • Czech Republic (17 %) • **Spain** (17 %) • Hungary (18 %) • **France** (18 %) • India (22 %) • Estonia (25 %) • Taiwan (26 %)	• **The Netherlands** (31 %) • Australia (31 %) • Hong Kong (31 %) • USA (34 %) • Finland (45 %) • Canada (46 %) • Denmark (47 %) • Norway (53 %)
Source: Taylor Nelson Sofres (2001a)		

[205] Taylor Nelson Sofres (2001a)

3.2.2 EU level: The "Europa" website run by the European Commission

"Europa is the portal site of the European Union (http://europa.eu.int/). It provides up-to-date coverage of European Union affairs and essential information on European integration. Users can also consult all legislation currently in force or under discussion, access the websites of each of the EU institutions and find out about the policies administered by the European Union under the powers devolved to it by the Treaties." ("Europa" self-description in January 2002)

3.2.2.1 Strategy

The website "Europa" was started on the Commissions' initiative in 1995. On the recommendation of the European Parliament, the General Secretaries of all bodies founded a task force, which developed into an inter-institutional Internet drafting committee under the chairmanship of the Commission.
The main issue of the cooperation was to define and realize common forms of presentation, layout and navigation forms to give the user a feeling of "trust". In 2001 the Commission emphasised the necessity to concentrate more on the content of the single websites.[206]
To deepen the exchange between the citizens and the institution by the Internet an "e-Commission" initiative was launched in 2001.

The president of the Commission defines three main objectives to fulfil the quality of service expected from modern administrations in the era of e-government:

- Information services providing easy access for all to updated, user friendly and multilingual information tailored to the users' needs
- Interactive communication services allowing citizens a real say in the shaping and implementation of politics through open, real-time, multilingual dialogue with the Commissions administration
- Transaction services allowing citizens electronic access to all the basic forms of transactions with the EU

The Commission emphasises that these services should be supported as often as possible in partnership with other EU institutions, Member States, NGO's, associations, lobby groups, companies working with EU institutions, citizens groups and other organisations.

The new "Europa II" web performance is planned to be implemented by the following timetable:

2001/2002 Opening of a set of thematic portals and of an initial set of e-services on "Europa". Construction of core e-services and e-Support services to allow the completion of the further e-services and the migration of all "Europa" sites to an integrated thematic structure.
2003/2004 Availability of a complete set of e-services. All information sites are integrated in the overall thematic portal structure of "Europa".[207]

[206] KOM (2001: 354)
[207] European Kommission (2001c: 4)

As part of the e-Commission initiative the European Commission adopted a communication on Interactive Policy Making [IPM - C(2001)1014] in April 2001. The aim is to improve governance by using the Internet for collecting and analysing reactions in the marketplace for use in the European Union's policy-making process. This initiative is aimed to be used by the Commission to evaluate existing EU policies and to open consultations on new initiatives.
It is designed to help the Commission to respond more quickly and accurately to the demands of citizens, consumers and business with a view to making EU policy-making more transparent, comprehensive and effective.

The IPM initiative involves the development of two Internet-based mechanisms:

- A *feedback mechanism* which helps to collect spontaneous reactions in the marketplace. It uses existing networks and contact points as intermediaries in order to obtain continuous access to the opinions and experiences of economic operators and EU citizens.
- A *consultation mechanism* which is designed to receive and store rapid and structured collection of stakeholders' reactions to new initiatives.

The IPM instruments are available via a new web service: "Your voice in Europe" (http://europa.eu.int/yourvoice). This web portal enables citizens, consumers and businesses to give input to new initiatives, give feedback on the application of existing legislation, discuss the future of Europe or lodge complaints. "Your voice in Europe" gives access to a wide variety of interactive tools such as on-line consultations, feedback mechanisms, webfora, chat rooms and complaint procedures, which allow citizens, to play an active role in the Commission's policy making process. The objective is to achieve a better participation of stakeholders and contribute to more responsive and speedy implementation of new policies, both main objectives of the Commission efforts to reform European governance.

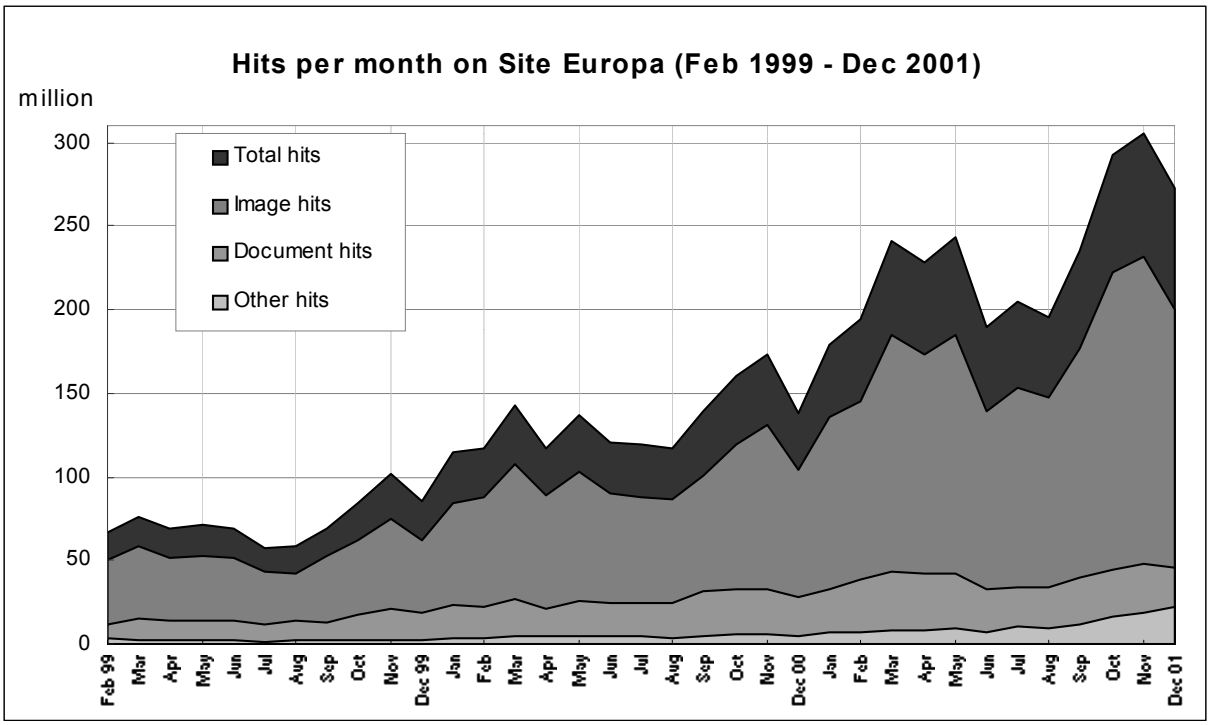
3.2.2.2 Hits

According to the Commission, the website “Europa” (http://europa.eu.int) has grown into one of the largest, most popular and most referenced public website in the world over the last few years. The total hits per month on “Europa” almost doubled from December 2000 to December 2001.

Hits on the "Europa" website								
Period	Number of hits per month in million		Increase in % over previous year		Breakdown of total hits in %			
	Total hits	Document hits	Total hits	Document hits	Doc. hits	Image hits	Other hits	Errors
Feb 1999	**66.9**	**12.3**	.	:	18	75	5	1
Dec 1999	**85.3**	**18.5**	27*	51*	22	73	2	3
Dec 2000	**137.8**	**27.7**	62	49	20	75	3	1
Dec 2001	**272.8**	**45.9**	98	66	17	73	8	2

*Refers to the increase from December 1999 over February 1999.
Data source: http://europa.eu.int/abouteuropa/stat/index.html / Percentage change: own calculation.

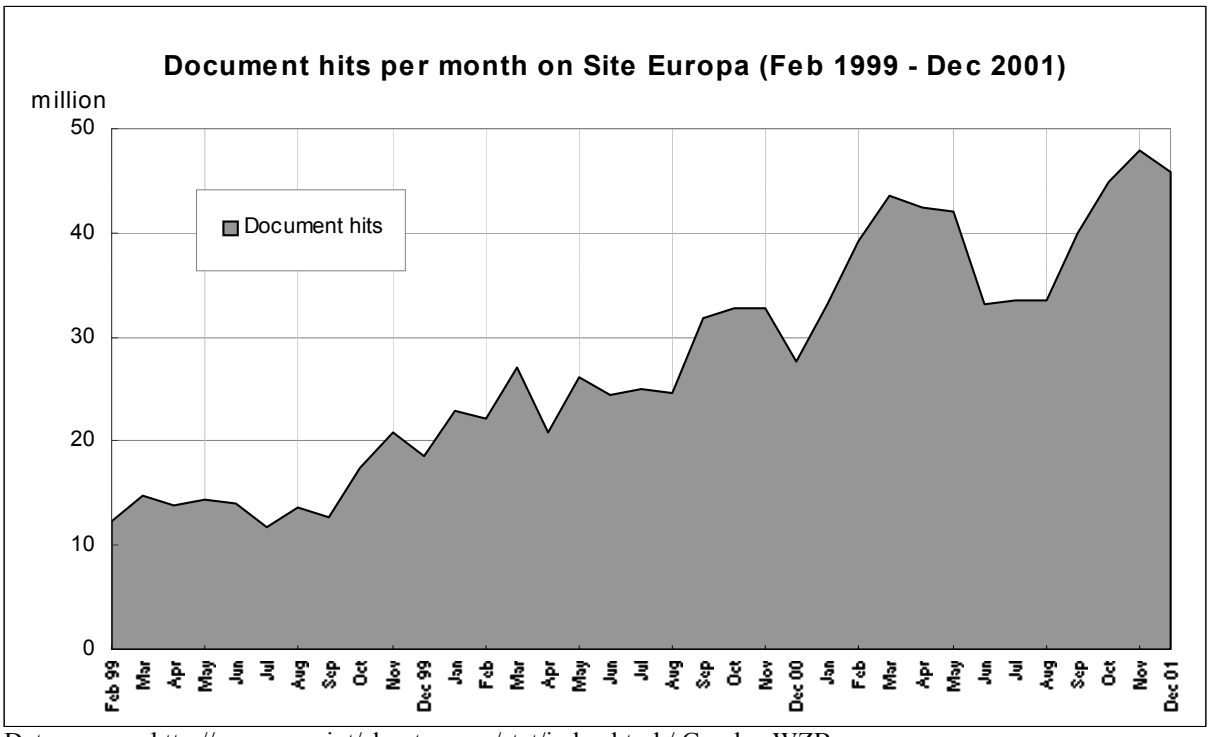
All hits increased more or less constantly between 1999 and 2001. "Image hits" refer to successful hits on image files which constitute the graphical layout of a website. "Document hits" count all retrieval of documents in all kind of forms. "Other hits" are successful hits on all other files, for example sounds (extension wav) or zip compressed files (extension zip).



Data source: http://europa.eu.int/abouteuropa/stat/index.html / Graphs: WZB

Since the Image hits and most of the other hits are primary an indicator for the increasing graphical standard and layout techniques of the "Europa" website, the most interesting

measures in regard of the use are the document hits which are showed once again separately below.



Data source: http://europa.eu.int/abouteuropa/stat/index.html / Graphs: WZB

Nevertheless these data don't provide an overview of the numbers of visitors on the website. Therefore the data have to be interpreted very carefully. What they imply for sure, is that the traffic on the "Europa" website is constantly growing.

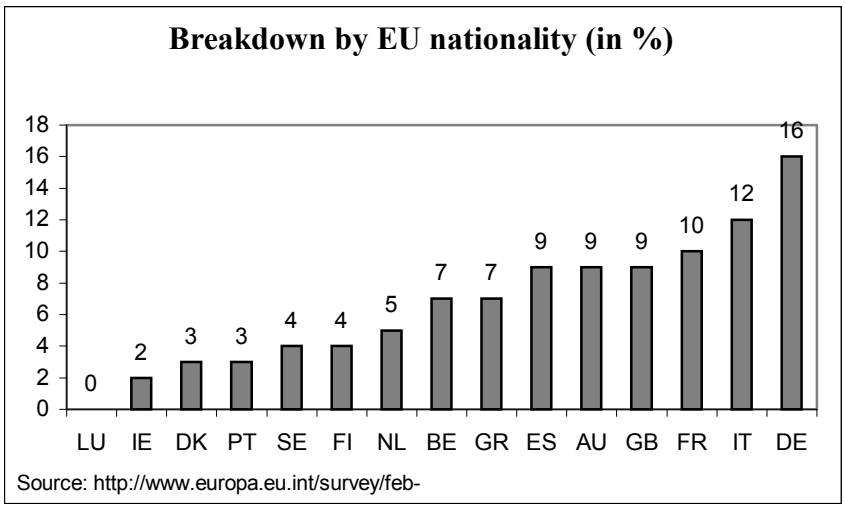
3.2.2.3 User profile

The website "Europa" launches periodically an onlineconducted user survey.[208] The intention is to get to know the users better, gauge their degree of satisfaction and pool their suggestions on how the site could be improved. Some results, referring to the period between February and March 2000 and based on 5 721 users, are represented below, Since this is an online survey the results only provide information on those users who replied to the questions and, strictly speaking, cannot be taken as representative of all "Europa" users. Nevertheless, they are most likely a fair reflection. Three quarters of replies came from regular users and one quarter from people who were visiting "Europa" for the first time.

Men seem to be more likely to use the European website: twice as many men as women replied to the questionnaire (men: 66 %, women: 34 %). Breaking the users of "Europa" down by age, most of them are aged 20-29 with a share of 40 %. Only 8 % of the user are younger than 19 years and the share of the 60 and older aged people declines to 2 %. People aged 30 to 39 are represented by a share of 26 % and 15 % of the users are aged 40 to 49. In sum 81 % of the visitors on the European website are people aged 20 to 49.

The following graph represents the users of "Europa" website broken down by EU nationality.

[208] At: http://europa.eu.int/survey/feb-mar00/results/survey_en.htm

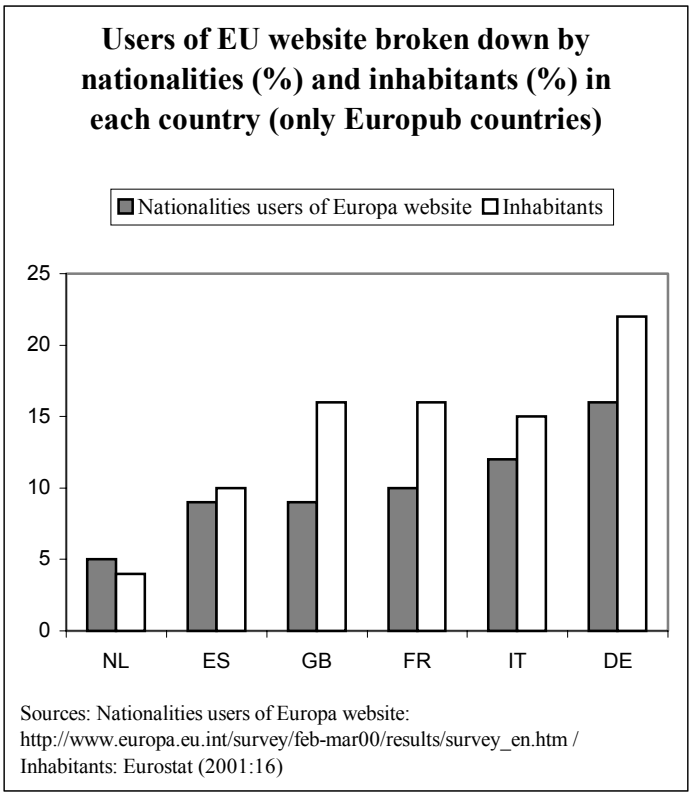


To get a deeper impression of the distribution between the countries of our study (except Switzerland) the figures below show the number of inhabitants in each country and a comparison with the user of "Europa" website broken down by nationalities.

Number of Inhabitants 2000
(EU states / Europub countries in bold type)

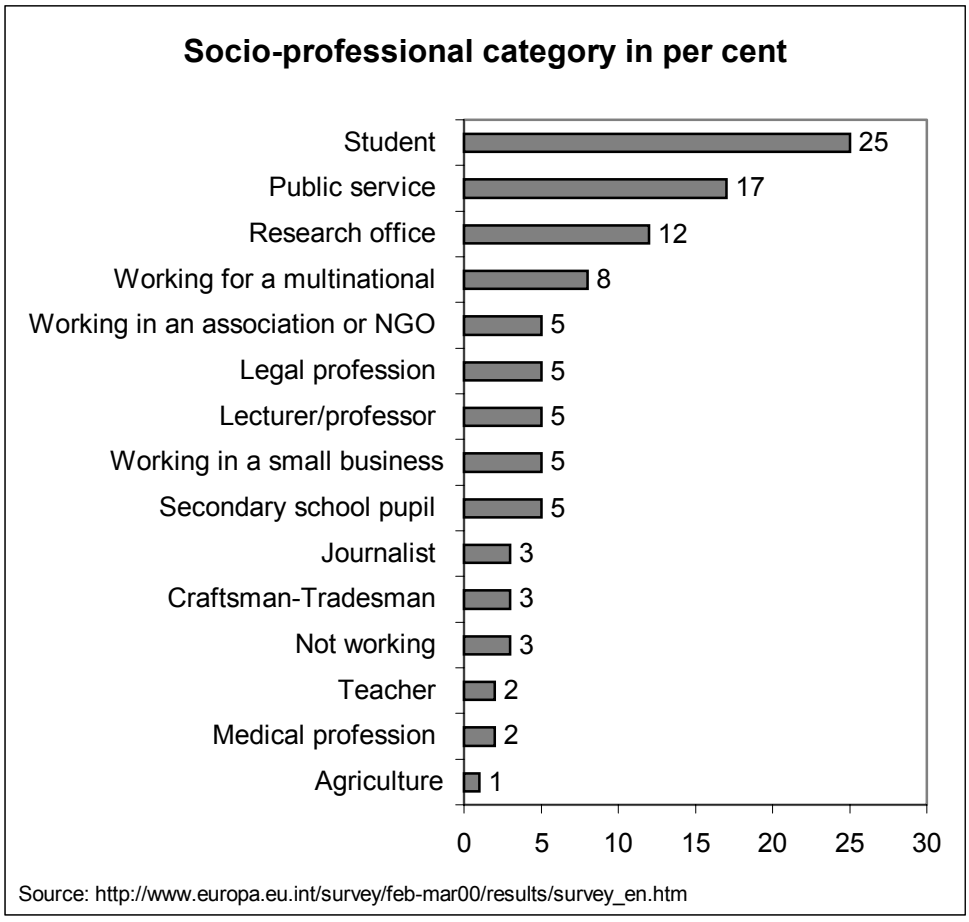
Country	*1000s (%)*
LU (Luxembourg)	436 (0 %)
IE (Ireland)	3 777 (1 %)
DK (Denmark)	5 330 (1 %)
PT (Portugal)	9 998 (3 %)
SE (Sweden)	8 861 (2 %)
FI (Finland)	5 171 (1 %)
NL (Netherlands)	**15 864 (4 %)**
BE (Belgium)	10 236 (3 %)
GR (Greece)	10 546 (3 %)
ES (Spain)	**39 442 (10 %)**
AU (Austria)	8 103 (2 %)
GB (Great Britain)	**59 623 (16 %)**
FR (France)	**59 296 (16 %)**
IT (Italy)	**57 680 (15 %)**
DE (Germany)	**82 164 (22 %)**

Source: Eurostat (2001: 16)

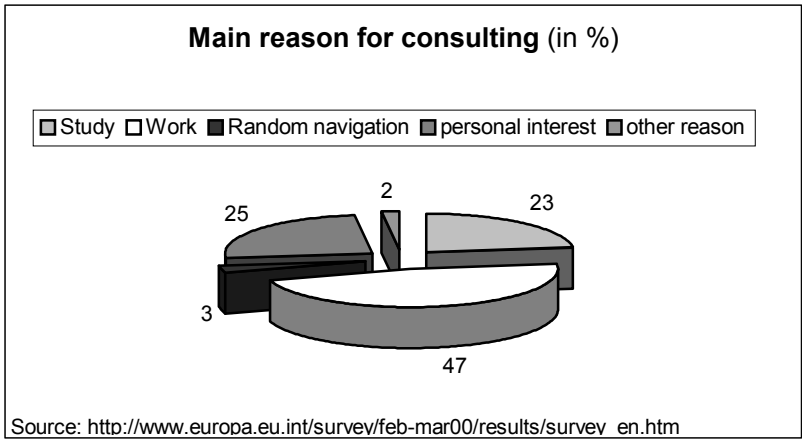


The Dutch users are slightly over-represented, while the other Europub countries are all under-represented in regard to using the "Europa" website. That seems to be the case in a larger extent for France, Germany and Great Britain than for Italy and Spain.

The analysis of the socio-professional background of the Internet users shows that one quarter of the visitors on the "Europa" website are students, followed by 17% of people working in public services and 12% are employees of a research office.

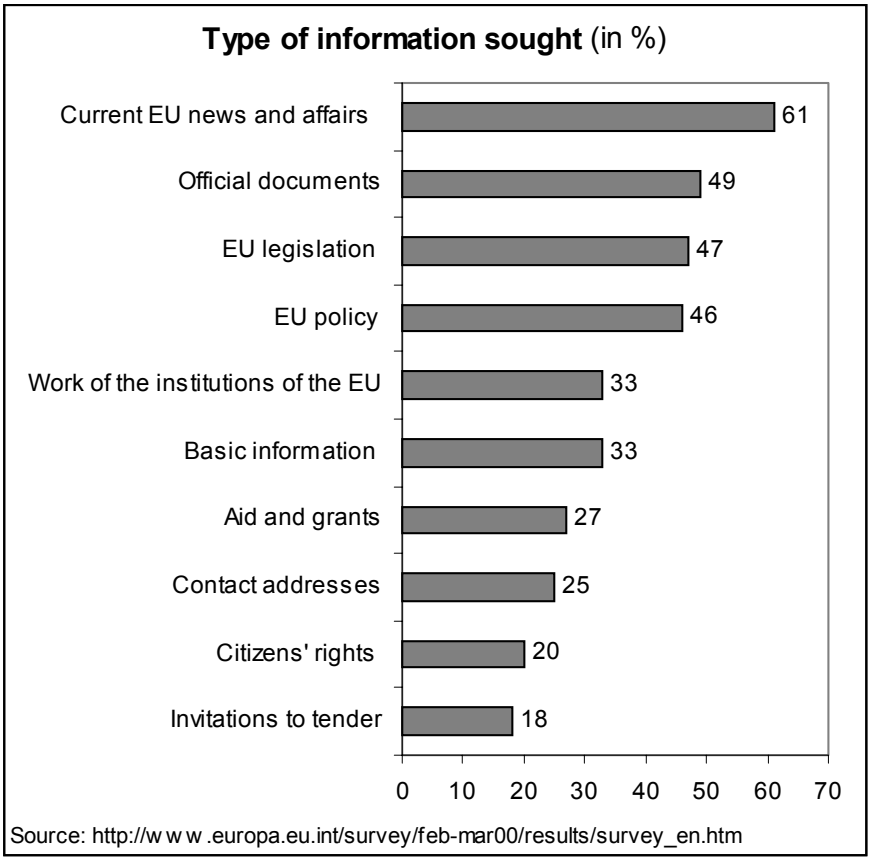


These findings correspond with the main reasons for visiting the "Europa" website shown below.



70 % of the visitors consult the "Europa" website because of their study or work. Only one quarter do so because of personal interest.

The visitors on the "Europa" website are searching mainly for current EU news and affairs (61 %), followed by searching for official documents (49 %) and looking for information on EU legislation (47 %). 46 % search for information on EU policy. Information about the work of EU institutions and basic information are each required by 33 %.



The most often used interactive services are subscriber mails (35 %). 29 % of the visitors take part in forums and 16 % use the mail-boxes. The offered chat rooms are visited by 14 % of the users, while 6 % use other interactive services.

3.3 Political parties and politicians

We found neither empirical studies comparing the Internet performance of political parties between the EU member sates nor about the Internet performance of European parties. On the national level there are some surveys which explore the Internet performance of national political parties in regard to several aspects, e.g. technical standards, design, communication offer, interactivity etc. To give an impression of the empirical situation in this field, some studies available in regard to our seven countries are summarised below. For Spain there are almost no studies on the Internet strategies of political parties or other relevant collective actors.

3.3.1 Switzerland

In regard of the Internet performances and strategies of the Swiss political parties, surveys analysing these aspects in a systematic way are hardly available. In one of the rare studies, Suter examines the election brochures on the Internet during the Zurich city council elections 1998 in regard to the aspects used on the Internet, its weighting, etc.[209] Longchamp found that about 15 % of all candidates to the Swiss federal parliamentary election of autumn 1999 had used the Internet in their campaign. About one fourth of parliamentarians disposed of their own website.[210]

In regard to the "user side" of political communication there are interesting findings about the usage of Internet during election campaigns and campaigns on popular votes in Switzerland. The "Selects 1999" survey conducted after the 1999 federal parliamentary elections included a question with regard to the usage of websites of political parties during the election campaign.[211] Only 11.1 % of all respondents (223 individuals) declared to have used websites of political parties. 0.7 % did so very frequently, 2.8 % frequently and 8.3 % rarely, whereas 88.9 % never visited such websites. But still, differentiating between voters and non-voters some difference becomes visible. While the proportion amounts to 14.4 % for voters, it falls down to 5.7 % for non-voters. Being asked about the influence different media had on the individual political choice for the 1999 federal parliamentary elections, 72.6 % of the voters affirm that the websites of the political parties had had no influence what so ever.[212] Only 6.1 % declare that such websites had been more than just moderately important for the constitution of their political opinion.
The GfS Institute carried out a survey preliminary to the 1999 federal parliamentary elections.[213] As it could show, the typical person most frequently using Internet as a means of political information was a potential FDP (Freisinnig Demokratische Partei) voter, disposing

[209] Suter, Hansueli (online publication)
[210] Longchamp, Claude (2000: 4)
[211] The question reads as follows: "During the weeks prior to the election, did you use websites of political parties "very frequently", "frequently", "rarely", or "not at all"?" [Kies/ Trechsel, (2001: 16)]
[212] The question reads as follows: "When choosing between parties and candidates, we can be influenced by different media. I would like you to tell me, how important each of the following media was for your proper choice. Tell me for each medium a number between 0 and 10. 0 meaning "not important at all" and 10 meaning "very important". [Kies/ Trechsel, (2001: 16, 17)]
[213] Survey period: September 1999; n=776 individuals who declared intending to participate in the elections taking place in November 1999.

of more than 9.000 Swiss Franks monthly household revenue, aged 18 to 29, male and Swiss German.[214]
The "VOX" surveys carried out since the 1970s the day after federal votes include a question about information channels used prior to federal votes. Since the votation of June 7th 1998 Internet has been included in the list of possible media. As Kies and Trechsel (2001) show, on average only 3.3 % of all voters used Internet as means of information[215] on issues being subject to popular vote.[216]

3.3.2 Germany

In regard to Germany, Rederer (2000) assumes that the Internet as a medium to mediate politics is relevant since 1997.[217] Concerning the common structural features of political online communication of political parties, information is mostly offered in press releases, archives, newsletters, speeches, reports, links and guest books. The typical forms of online interaction used are discussion forums, political chats and online events. As a more or less direct exchange between citizen and political actors, discussion forums are still the most often used form within political online communication. Since 1998 online chats are provided in addition. Online chats create a temporary and issue-focused public, often with the participation of prominent people. Such chats - with a pre-given place, time and topic and mainly specialized dialog partners - may contribute to strengthen responsive communication structures. New forms of political participation occurred in 2000. Online-events like the "Virtual Party Meeting" of the Greens in Baden-Württemberg (www.virtueller-parteitag.de) or the online offer of the FDP to conjointly work at the political objectives for the federal elections in 2002 are examples for a deepening of the interaction process.[218]

Bieber (2001) shows, that the political online offers of political parties passed a perennial product cycle from its beginning in 1995. He differentiates between four essential states of aggregation:
(1) The first online offers of political parties - the "digital brochures" - are mainly conceived as a "top-to-bottom" communication. New forms of communication functions are hardly provided, but provide an additional way to use the existing information and promotion material.
(2) The further development of "online-magazines" implies an increase of specific online media formats as thematic links and the communicational involvement of the users. Chats, discussion forums, guest lists and interactive "gimmicks", like games or polls, are offered. The information providing has adapted more and more to the form of media news coverage.
(3) "Virtual party headquarters" additionally include the party's internal communication. In the scope of the German federal elections in 1998, these high-performance Intranets were used for the first time intensively.

[214] Longchamp Claude (1999: 2-4)
[215] In regard to the vote of September 2000 and November 2000 the proportion had slightly risen to about 5 per cent.
[216] Kies / Trechsel (2001: 18)
[217] Rederer (2000: 509)
[218] Bieber (2001a: 16ff.)

(4) These developments increasingly pave the way towards the offering of "political web-portals", which provide an all-round service, including costumer orientated services and a central access point to related Internet offers.[219]

For a general overview the website "www.parteien.de" offers links to all German parties, which have an own website. Below the most important parties are listed by their domains and the opening date of the online performance.

Virtual Party Headquarters		
Party	**Domain**	**Opening**
SPD (Social Democratic Party)	www.spd.de	19.08.1995
CDU (Christian Democratic Union)	www.cdu.de	17.10.1995
Bündnis 90/Die Grünen (The Greens)	www.gruene.de	29.11.1996
FDP (Free Democratic Party)	www.liberale.de/www.fdp.de	04.12.1995
PDS (Party of Democratic Socialism)	www.pds-online.de	ca. April 1998
Source: Bieber (2001a: 10,14)		

All parties register an increasing number of visitors on their websites. Today, the digital offer is part of the standards of the communicative basic of political parties on every level of the political system.

Visits of Party Headquarters (Pageviews)			
	4/1999	**4/2000**	**2001**
SPD	403 542	351 049	957 108 (February)
CDU	409 545	869 197	1 352 07 (January)
Bündnis 90/Die Grünen	322 995	387 987	935 126 (March)
FDP	no answer	ca. 520 000 (June)	ca. 597 000 (March)
PDS	ca. 170 000	254 328	299 393 (March)
Source: Bieber (2001a: 11)			

Rederer (2000) analysed in 1999 the websites of the most important German parties in regard of the general impression, value of information, communication offer, manipulating moments, party subdivisions and information willingness about their websites. Below the main results for the five most important parties (SPD, CDU, the Greens, FDP and PDS) are represented.[220] According to Rederer the online performances of the political parties fulfilled the standards of electronic data processing and layout techniques reached at that time. The information level was high and communication opportunities like e-mail addresses, discussion forums, newsgroups and chats were offered in a broad extend. In regard of manipulative tendencies more differences between the parties occurred. While all parties were acting in a responsible way, the two largest parties, CDU and SPD, used the given possibilities much more than FDP, the Greens or the PDS. Only the websites of the SPD and CDU contained disparagements of the political opponents, inducements and "empty promises".
Rederer concludes that all the democratic parties in Germany search for a direct access to the citizen by using the Internet. The Internet presence positively influences the parties openness towards the public. The parties are open for critical and inconvenient discussions on their discussion forums and take them seriously, even if they are not decisive. The parties support

[219] Bieber (2001a)
[220] Rederer (2000)

the public discourse and offer a high level of political discussion culture. With their online work the political parties have made the Internet to a part of the political public sphere in Germany.

More critical are the conclusions of Welzel and Wieboldt (2001) concerning the political parties online performance in 2001. They explored the websites of the most important political parties in Germany with regard to seven factors: issues, service, interactivity, navigation, technique, design and editorial (reaction). Each website could have scored 150 points in all categories together. Some results are listed in the table below.

Online performance of political parties in Germany						
Categories (max. score)	**CDU**	**SPD**	**Grüne**	**PDS**	**CSU**	**FDP**
Issues (30)	24	23	26	15	16	13
Service (30)	20	18	14	17	17	18
Interactivity (30)	21	20	15	17	16	16
Navigation (20)	10	9	11	14	16	9
Technique (15)	9	10	11	11	7	7
Design (15)	10	12	13	9	12	10
Reaction (10)	10	10	10	10	5	5
Total (150)	104	102	100	93	89	78
Source: Welzel/Wiebold (2001: 98)						

In general, the authors attest all parties a professional web-performance. However, in the single categories they see some necessity for improvement.
Going into details, it is interesting to what extend the different political parties offer the opportunity of interaction. This point was analysed by investigating the providing of chat rooms, feedback forma, e-mail addresses, donation possibilities, forums, etc. The highest reachable score was 30. According to the results none of the largest political parties in Germany is using the whole potential of political online interaction. In general the authors missed voting tools, comfortable newsletters or a well kept archive.

3.3.3 France

In France 19 out of 24 official political parties have a web site. According to a study conducted by Fabienne Grefet about the French political parties on the net[221], national political sites are updated very often (almost daily) which is not the case for local political sites. Press releases, discourses, interviews are released on the web sites within hours of their publication.
As far as interactivity is concerned, five out of the six (the Front National does not have any forum or mailing list) main political parties enable some form of debate: via forums (Parti socialiste, Parti communiste, Rassemblement pour la République, Union pour la Démocratie Française) or mailing lists (Les Verts). Three parties (all on the Left) offer more flexibility (PS, PC, Les Verts) in the discussion as they do not impose any themes while the web sites of the RPR and UDF (Right-wing of the spectrum) prefer to limit the discussion on topics the party is interested in. Moreover, 'answers' from the party to questions sent through forums appear to be very short or, most of the time, there is no answer at all. It is also impossible to

[221] Most of the data reported in this section come from Greffet (2001)

become a member of a party online (some offer the possibility to print the document which has to be sent back with money) and there are no 'virtual' groups within the party.
From a technical point of view, the aforementioned study has compared the quality of different political parties web sites. Some appear very good from this point of view, especially the one of Démocratie Libérale with many videos to download (it might be linked with its conception of new technologies as a symbol of the liberal economy) while traditional parties (RPR and PS mainly) web sites are very poor in content and badly set up.
In terms of content, the web site of Démocratie Libérale appears once more the most impressive with a lot of articles, analysis from experts and links to other web sites. The web site from Les Verts also has a lot of content with archives dating back to 1996 (when the site was created) but most web sites appear rather poor with only chronologies of the party and internal literature.
Most sites remain very national since only the National Front web site proposes an 'English version'. Les Verts is the only party where 4 foreign languages are available: English, Spanish, German and Greek. Very few of them list links to foreign web sites (except for Démocratie Libérale).

In a survey of netpolitique.net French members of parliament were asked about their Internet usage.[222] All of the respondents said there are connected to the Internet for professional reasons. 60 % use e-mail and 35 % have an Internet access also at home. Among the 103 MP's who answered, 39 said they have a web site dedicated to their parliamentary activity.
The opinions about the role of online communication during the 2002 general election are divided. While 40 % considered that online communication would play an important role, 46 % stated it will play a minor role.

3.3.4 Italy

In respect of Italy De Rosa (2000) points out that the elections of 1996 have represented "the debut of political communication in the Internet".[223]
A lot of the Italian political parties perceived the elections as an important occasion and activated their own websites. They considered that their presence on the Internet was perceived as an indicator of modernity by the electorate.[224]
Analysis of the presence of parties on the Internet shows clearly that the greatest part of their web-sites were shaped as a showcase, limited to the offer of information, and they did not exploit interactive opportunities provided by new technologies.
With regard to parties' presence on the web, the situation has partially improved with the general elections of May 2001: the percentage of candidates on the web has reached 10% for the Chamber of Deputies (*Camera dei Deputati*) and 17% for the Senate (*Senato della Repubblica*). The websites achieve more and more the hi-tech standards and exploit fully the interactive opportunities of computer mediated communication.[225]
Nowadays it seems that all parties perceive the fundamental importance of their presence on the Internet. Different from traditional mass-media, the Internet excludes the presence of gatekeepers selecting the content of information provided to the audience: the Internet allows "the creation of communicative flows entirely controlled by the producer".[226]

[222] at: http://www.netpolitique.net/deputes_et_internet.htm
[223] De Rosa (2000b: 11)
[224] Bentivegna (1999)
[225] Bentivegna (2001)
[226] Bentivegna (1999: 39)

The following table gives an overview of Italian political parties' web sites. We selected only some parties in order to offer to the reader a more clear image of the current situation.

Main political Italian parties: year of foundation, date of creation of the web-site and URL			
Political Party	**Foundation's date of the party**	**Date of web site's creation**	**URL**
Right-wing parties			
Centro Cristiano Democratico (CCD)	1993	June 1998	www.ccd.it
Cristiano Democratici Uniti (CDU)	1995	*	www.cdu.it
Forza Italia	1994	February 1995	www.forza-italia.it
Alleanza Nazionale (AN)	1995	December 1995	www.alleanzanazionale.it
Lega Nord	1991	*	www.leganord.org
Democrazia Europea (DE)	2001	*	www.sergiodantoni.it
Lista Radicali/Bonino	1994	*	www.radicali.it
Movimento Sociale-Fiamma Tricolore (MS-FT)	1995	*	www.msifiammatric.it
Left-wing parties			
Italia dei Valori	2001	*	www.antoniodipietro.org
Margherita	2001	*	www.margheritaonline.it
Socialisti Democratici Italiani (SDI)	1994	*	www.socialisti.org
Democratici di Sinistra (DS)	1991	January 1996	www.dsonline.it
Partito dei Comunisti Italiani (PdCI)	1997	May 1999	www.comunisti-italiani.it.
Verdi	1987	*	www.verdi.it
Rifondazione Comunista (RC)	1991	March 1996	www.rifondazione.it
Source: Bartali (2000: 10)			** missing data*

As the table above shows, all main Italian political parties have a website. It is important to notice that significant differences were detected among these sites. Bartali (2000) analyses in an empirical study the main characteristics of Italian political parties, which are listed in the figure below. Almost all analyzed websites have advanced graphics with animated icons and provide links to other sites. It seems that parties are also very interested in giving their sympathizers the possibility to access radio and video archives. On the contrary it is surprising that there are only a few parties who offer search engines on their website to facilitate the information seeking. The availability of interactive tools like forums, mailing-lists, chat-lines, online surveys, etc is also very limited. Since they require professional staff to be implemented, probably some parties did not consider it a good strategy to invest resources in them.

Finally, it is interesting to notice that only few parties on the web give their sympathizers the possibility to make online subscriptions. Only few of them are interested in making their site accessible to foreigners by providing an English version of some contents of their web-site.

Main characteristics of some Italian political parties web-sites							
Political party	**Web-sites characteristics**						
	Animated icons	Interactive tools	Links	Research engines	Audio and video archive	On-line subscriptions	English version
Larger parties							
Forza Italia	●	●	●		●		●
Margherita	●	●	●		●	●	
AN	●		●	●	●		●
DS	●	●	●	●	●	●	
RC		●	●	●	●	●	●
Smaller parties (new politics/pro-system parties/anti-system parties)							
Lega Nord	●		●		●		
CCD	●	●	●		●		
CDU			●				
SDI			●				
PdCI	●		●	●			●
Verdi		●	●	●	●		
Italia dei Valori	●				●		
DE			●				
Radicali		●	●	●	●	●	
MS-Fiamma	●			●	●		
Source: Bartali (2000: 12)							

3.3.5 Netherlands

Given that there are almost no studies on the Internet strategies of political parties or other relevant collective actors in the Netherlands, some very preliminary findings are presented in the following.

The Dutch minister of Urban and Integration Policy, Van Boxtel, who is responsible for the co-ordination of ICT policy for citizens has had his own web-site ever since he took office. The site has an exemplary role for the other ministers. It contains the agenda and diary of the Minister, a weekly column, a survey and you can invite the Minster for lunch to discuss pressing matters. The pages are equally available in English, Arabic and Turkish. The minister has once a month a one hour live chat on a topical issue. In December 2001, Minister van Boxtel announced that 25 % of the public services of the authorities were available on-line. On that occasion he announced the foundation of a digital ombudsman. Citizens can there complain about all problems with digital public services. Since October 2001, a rank list has been published on Internet, judging which authorities have the best websites.

Not only all Dutch ministries have their own web-sites, including options for chats and web-discussions, but also both the Upper and the Lower chambers of the Dutch Parliament have very elaborate ones, including a well developed overview of their debates and the respective relevant documents. The Ministry of Foreign Affairs has recently become very active in its information and communication activities on the EU and more in particular on enlargement. The website for debating these matters is http://www.europa-interactief.nl and called 'Europaportaal'-enlargement EU (*Europaportaal-Uitbreiding Europese Unie*). It contains

amongst others general information, an overview of media reporting and several opportunities for debate.

3.3.6 United Kingdom

In regard to the UK the vast majority of the research that has been carried out on political parties' use of the Internet relates to the 2001 general election campaigns. This is unsurprising given that political events such as elections provide profitable testing ground for parties' use of new media in campaigning. Stephen Coleman argues that the next significant ground for party Internet campaigning will come 'if and when Britain holds a referendum on the euro'.[227]

An example of research on UK political parties and the Internet is Ward and Gibson's (2001) paper on candidate websites in the 2001 general election.[228] They point out that there was considerable speculation that the 2001 election would be the first real Internet election, with one of the expected spin-off benefits of using ICTs touted as the new technologies' ability to mobilise voters. Potential attractions for parties of using ICTs in political campaigns are identified as:

- Delivering information unmediated to voters
- Mobilising and targeting voters more effectively
- Creating an ongoing dialogue with voters
- Decentralising political campaigning, thus potentially providing a useful platform for local candidates and parties to present their viewpoints to a wider audience, away from the rigid messages of national campaigns

The first is borne out by Coleman's analysis of the role of the Internet in the 2001 election, which finds that the main advantage of the Internet to parties was that 'it offered them a chance to address themselves directly to the electorate, without the intervention or interpretation of the media'. The actual Internet strategies that parties used, however, tended to be fairly unimaginative. Coleman concludes that the parties: "knew that the net was important, but few knew how to use it inventively. Old forms of publicity were replicated within a new medium: parties and candidates set up websites that looked rather like printed brochures…"

As such the Internet was primarily used by the parties for the online delivery of previously offline marketing material. In general, claims Coleman, there was 'a lack of connection with the voters', with interactivity limited to ineffective email feedback channels and tentative attempts to create personalised content. As such, while parties did take advantage of the 'unmediated' nature of the Internet to communicate with voters during the run-up to the 2001 election, they failed to exploit the net's interactivity or its ability to personalise and 'narrowcast' content by targeting certain sectors of the electorate.

In line with this, Ward and Gibson record that parties' actual Internet strategies were generally 'greeted with scorn' by journalists and think tanks. They were criticised for failing to engage with the technology as well as for failing to use the technology imaginatively. Parties and candidates were charged with simply engaging in online propaganda with boring content and largely ignoring interactivity, as the following comment from Ian Kearns of the Institute of Public Policy Research illustrates:

'The Internet as a medium is woefully under-utilised by political parties with most having web-sites with no real feedback mechanisms, no discussion groups and no noticeboards.'

[227] Coleman (2001)

[228] Ward / Gibson (2001a)

Ward and Gibson conclude that the Internet ultimately 'had marginal impact on the election campaign'. However, they point out that the Internet 'is being integrated into the parties' campaign toolbox more quickly than previous technologies' and argue that the quality of what is offered online by UK political parties is likely to increase rapidly.

In another article, Ward and Gibson review recent developments in the use of ICTs by UK political parties, concluding that so far 'the Internet has been more an administrative device for parties than a tool for democracy and participation'[229]. The spread of Internet politics has been fastest at national level, while local-level Internet communications by UK political parties remain erratic. As regards Internet strategy, initially most parties had no coherent strategy for their Internet activities, the majority setting up sites in response to rival parties' online presence. The vast majority of party sites have used the web primarily as 'a top-down information tool'. Ward and Gibson point out that the major British parties 'tend to follow a consistent model, with policy documents, organisational information and press releases making up the bulk of most sites, reflecting the needs of their major audience (journalists, students and researchers)'. Little interactivity is evident in the major parties' websites, which are without open discussion areas. Significantly for claims that the Internet can play an important role in the democratic process by facilitating citizen feedback, the major parties' websites usually contain general encouragement to contact the party with views, but there is little that suggests what happens to citizen opinions once they are expressed and little organised structure (such as surveys) to the feedback such websites solicit.

Minor parties (particularly those from the extreme right, such as the BNP) have been quick to take advantage of the web's possibilities for unmediated political communication and 'have repeatedly stated that the web is one of the few means they have of delivering their message to voters'. As such it seems likely that the Internet 'can enhance the presence of small parties, not least because they are easier to find than in the traditional media'[230].

[229] Ward / Gibson (2001b)
[230] Ward / Gibson (2001b)

3.4 Other collective actors

The most under-researched areas concerning Internet strategies of political actors concerns the Internet use of interest groups, NGOs and citizens' groups in our seven countries and on the European level. Available are mostly strategy papers and statements of the organisations themselves or theoretical analyses on the possibilities the Internet may offer to these collective actors.
There are some studies which concentrate on new forms of protest via Internet which analyse single protest events, such as the "Internetstreik" throughout Germany in January 1998. A large number of Internet users initiated an "online-free" Sunday to protest against exorbitant telephone charges. The action was coordinated by the non-profit association "Dark Breed". The association offered general information on its website "www.internetstreik.de", sent circular letters and wrote an open letter to Ron Sommer (chairman of the management board of the Deutsche Telekom AG). In the beginning of October 1998 there were several hundreds websites linked to the strikers. Until the end of the month about 500,000 people visited the website, 10,000 e-mails arrived and 6,000 Internet users joined the strike.[231]
However there are hardly any systematic empirical surveys which explore the role of interest groups, NGOs and citizens' groups on the Internet as a new arena for political communication.
This is even more surprising when taking into account that it seems that some of these collective actors begun very early to use the Internet as a platform for political communication. As Longchamp argues, the breakthrough of political Internet usage in Switzerland took place in the context of the popular vote on the "Genschutz-Initiative" in June 1998. In this case the three main political actors involved - pharmaceutical industry, Greenpeace, and scientists - extensively used Internet, on the one hand in their own fields of work and on the other hand also in their campaigning.[232]

Because of the thin empirical base in the field of collective actors such as Interest groups, NGOs and citizens groups' we focus on some findings on NGOs and Unions in the UK as examples.

3.4.1 Non-governmental organisations

'Non-governmental organisations' is an umbrella term classifying many vastly different organisations together: charities, voluntary organisations, churches, humanitarian aid organisations, and campaigning groups ranging from huge and transnational (e.g. Amnesty International) to tiny or local-level. While some NGOs such as Oxfam have considerable resources at their disposal, the majority are resource-poor and financially stretched. As such it might be expected that use of ICTs would vary widely between NGOs, depending very much on the size, resources and constituency of the organisation. However, few if any systematic studies have been carried out of how UK non-governmental organisations use ICTs, making this an important avenue for future research.

The transnational nature of many non-governmental organisations is reflected to some extent in the ways in which NGOs appear to be using the Internet. For example, since NGOs are often small, underfunded and generally resource-poor, joint Internet strategies exist to allow

[231] Bieber (2000a: 171)
[232] Longchamp (2000: 4)

them to use the Internet collectively. Prominent organisations of this kind include the Internet server *OneWorld* and 'cooperative platform' *Euforic*. Furthermore, plenty of material is available on the Internet to train NGOs in Internet strategies; see for example the APC [Association for Progressive Communications] website[233], which has an entire section for NGOs on the Internet. However, while such resources provide plenty of suggested strategies, the information contained there is of little help in identifying how UK NGOs are actually using the Internet for political communication and organisation.
In the charity sector, it seems that UK-based charities in general do not feel they do well at offering online services to the public. A study from the Future Foundation[234] found that only a third of charities thought they were making the most of the Internet, and just over half had a strategic plan for making use of the web. However, this again seems to vary widely; for example, services for homeless people have been forging ahead online in joint initiatives between charities and the government[235].

In summary, there is plenty of anecdotal evidence available on how NGOs use the Internet, but little of this is specific in regard to our seven countries or the EU level or in any way systematic. For example, it has been argued that when the Internet is used for mobilisation, 'some campaigns … begin to adopt more interactive techniques', such as the coordination of British NGOs' efforts to lobby European policies on various subjects during the last UK presidency of the EU. However, it remains to be seen whether such Internet techniques might also be used by NGOs working in the 6 policy fields covered by the Europub project.

3.4.2 Trade unions

UK trade unions have recently begun to wake up to the possibilities of using ICTs for organising and campaigning. The TUC [Trades Union Congress] held a two-day conference in May 2001 on 'Unions on the Internet', and their subsequent annual conference in September 2001 'recommended the more systematic use of web-based services to boost union recruitment'[236]. The primary impetus given in the unions' literature for desiring to harness ICTs is that new methods of dealing with current recruitment, retention and participation problems are required. The new technologies are seen by the TUC as likely to benefit unions in four main areas: recruitment (boosting declining recruitment levels), democracy (increasing union accountability and representativeness), participation (providing more rapid and frequent communication between unions and members) and global links (forming alliances with labour movements and other campaigning actors operating beyond UK borders).

Regarding the current state of play of Internet use by trade unions, a briefing document issued to participants at the May 2001 TUC conference argues that while most national UK unions have websites, these 'vary hugely in quality and ease of access'[237]. Most union websites have basic information about the different sections of the union, an online subscription facility, and information for members and activists. Internally, most unions have e-mail access, and some such as Connect [union for communications professionals] and AUT [Association of University Teachers] have e-mail discussion groups for members in a particular company or group. Others such as NATFHE [the University and College Lecturers' Union] have regular

[233] At: http://www.apc.org/english/ngos/index.htm
[234] At: http://www.future-foundation.net
[235] Sarah Left, 'Public Services Online', Society Guardian, Tuesday July 17 2001
[236] European Industrial Relations Observatory Online (2001)
[237] Sims (2001)

e-mail up-date facilities. Unions have also perceived ICTs as offering new ways of delivering trade union activist and vocational education, enabling increased participation for those who are unable to attend physically. For example, the TUC has launched the Learnonline programme and many trade unions have already developed web-based courses. Online 'toolkits' and information about using ICTs for organising and campaigning are available to unions via the web organisation Labournet, which exists to 'promote computer communications as a medium for strengthening and building organised labour'. Originally a US organisation, Labournet now has around seven other national networks as well; see http://www.labournet.net for further details.

However, there was little evidence in 2001 to suggest that unions were using new technology to any significant extent in organising campaigns. The briefing ascribes this to the fact that most trade union campaign organising currently involves groups of workers who do not have access to ICT at work and who may well not be able to use (or do not feel comfortable using) ICT at home. As such a clear relationship would seem to exist between the ability of trade unions to use new technologies in campaigning and the ability of their members to access the Internet. In practice so far, the use of new technology in any extended way has been limited to those unions organising in sectors that are computer literate and which are predominantly white-collar. Examples of successful campaigning using ICTs to mobilise include that carried out by the AUT to organise fixed-term contract workers. Since academic staff are almost certain to use the Internet, it was possible for the AUT campaign to rely heavily on ICTs.

Obstacles to the use of ICTs by UK unions have become apparent. A particular stumbling block is online participation in union activity; a Poptel survey carried out for the TUC in early 2001 found that there was still a strong preference among union members for traditional, face-to-face forms of participation within the UK union movement. Research also indicates issues with union training on the Internet, in that many online training courses offered by the unions are facing teething problems. In addition, many union representatives at the May 2001 TUC conference voiced concerns about the misrepresentation of unions' campaigning messages on the Internet, pointing out that a decentralised communication forum could easily become the setting for 'incoherence of message'. Some felt that a central body was needed which would oversee the web presence and web activities of the UK trade union movement. As such a measure of concern exists within UK trade unions as to their own possible lack of control over use of ICTs in campaigning and organising.

For a comprehensive review of UK trade union use of the Internet, see the feature 'Unions and the Internet: prospects for renewal?' by European Industrial Relations Observatory Online.[238]

[238] At: http://www.eiro.eurofound.ie/2001/10/Feature/UK0110108F.html

Conclusions and research aims of workpackage 4

The comparison in chapter one of the Internet policies of the governments of the seven selected countries shows a high degree of convergence at the political level. Many policy processes were stimulated by action at the EU level, namely the internal market liberalisation in the field of telecommunications, but also the more general strategies towards the Information Society developed in the mid-nineteen nineties. This convergence can be found both in the EU Member States and in Switzerland. While the contents of national governmental policies resemble each other in many aspects, the timing was not the same in all countries: The British and German governments had launched active policies in this domain way ahead of the Spanish and Italian governments. This differentiation between countries reoccurs in the market size and structures. The Internet market in Europe still appears to be highly nationally fragmented, even if there has been a trend to successful entry of large national Internet service providers in other European national markets, such as by T-Online, Wanadoo/France-Télécom, Tiscali etc. Yet, the most important cross-national player on the European Internet market remains the US group AOL/Time Warner. Germany and Britain have the largest Internet markets in Europe, growth rates of Internet services have generally been extremely high between 1997 and 2001, but along phases that were still limited nationally. The national markets are also distinct in terms of concentration of ISPs (i.e. market share of the leading provider and/or of the three biggest ISPs): the German, Swiss and Italian markets appear to be more concentrated than the French, Dutch and Spanish markets, and the British is the most competitive market.
Besides government policy and general economic environment, there were also other factors that helped shape national specificities, such as the general distribution of minitel in France.
The Internet could only slowly gain the status of a mass communication means after 1998 when the free access model first applied in the UK spilled over to the other countries and brought about a dramatic fall in prices for the individual customer.

In all seven countries, governments have adopted active policies to improve their relationship with citizens through electronic government. In the beginning, and still now in some countries, these e-government strategies were mainly limited to making information available online, at all levels of government (always at national, mostly at regional, and sometimes at local level). In addition, e-government is more and more used for communication (via e-mail, discussion forums, sometimes call-centres). And recently, governments with more ambitious online strategies have also started using their web sites for transactions such as electronic tax declarations or payments of government services or fines.
Direct citizen participation through electronic voting is still far from becoming a European reality: only Switzerland, the Netherlands and the UK have undertaken (or are about to do so) pilot projects to test e-voting.

The secondary data discussed in chapter two “Internet usage” indicates that our seven countries can be distinguished in three groups of Internet penetration: countries with an averagely high level of Internet access and usage (the Netherlands and Switzerland), countries with a medium level of Internet access (the United Kingdom, Germany and France) and countries with a relative low level of Internet access and usage (Italy and Spain).
In all countries there are still large differences in Internet usage along socio-demographic variables. Besides age and gender, socio-economic variables such as educational level, income and the geographical region where people live in, seem to strongly influence the likelihood to be an Internet user.
Some of the rare information available in regard to reasons for non-usage and barriers raise the speculation, that in contrast to widespread assumptions the main reasons for not using the

Internet are related to a lack of interest or need instead of insufficient skills or financial resources. If this assumption could be proved that would imply the necessity to change prevalent government Internet politics, which mainly focus on providing a cheaper Internet access and improving educational skills.
First findings concerning the usage of the Internet for political information seeking or other political activities suggest, that the Internet may strengthen a pre-existing interest but it seems to be rather unlikely that the Internet itself leads to an increasing political interest of the Internet users in general.

The third chapter clearly showed that there is a lack of empirical information on Internet strategies of political actors. Elite political campaigning using the Internet, especially by the government or political parties has received the most attention in this regard, but also this information is limited. The Internet use and strategies of other collective actors are extremely under-researched. There are hardly any empirical studies which conceptualise the Internet as an arena for political communication as a whole - involving different kinds of political actors and different policy fields. In the main, the actors are analysed separately without taking into account discursive contents of political communication networks that are facilitated via the Internet. This applies for the national level and especially for the European level.

This poor and almost non-existent state of knowledge about the Internet as an arena for political communication underlines the importance of the primary analyses that we plan in the Europub.com Project, but unfortunately also implies that we will have to develop a methodology and theoretical approach for doing this almost from scratch.
The overall aim of workpackage 4 in the scope of the Europub.com Project is to conduct an empirical analysis of the use of the Internet by collective actors as a new form of media for carrying exchanges of political communication that may contribute to Europeanisation. Our primary objective is exploratory and future-oriented and involves analysing: a) the patterns and flows; and b) the discursive contents of political communication networks that are facilitated via new media technologies.
To map the network of political communication that is facilitated via the new media, we propose to search the web for sites of key organisations from five categories (Government/administrative; socio-economic; political parties; non-governmental organisation (NGOs); and social movements), that operate in the six substantive policy fields (agriculture, monetary politics, military troops deployment, immigration, retirement and pension schemes, education.) on which this study focuses plus the general topic of European Integration. This part of the research must remain to some extent 'open-ended' as what is required is a search for political communication networks. We shall code for the explicit 'links' between organisations' sites in order to determine the networks and linkages between organisations, as an indicator for Europeanisation.
In a second step, we will focus more in-depth on strategically selected organisations and websites. We will select at least one website per country and for the EU level from each of the five above-mentioned actor types in each of the six substantive policy fields as well as in the general field of European integration. For particular important actor type/policy field combinations, more than one website may be coded. Here too, we will additionally pay attention to the network structure of Internet communication by asking site managers to provide us for a specified period with information on the numbers of hits they receive, and with referral reports showing from where people arrive at their site and where they go after having visited the site. Needless to say, we will be particularly interested in the extent to which such communicative network transcend national boundaries and thereby constitute a transnational space for political communication.

Lastly we conduct a discourse analysis of the political claims represented on selected sites, and if organisations keep lists of e-mail subscribers, we will consider circulating a brief questionnaire designed to examine usage of sites by individuals.

This research on the Internet as a potential for new forms of linkage and communication between political authorities and citizens is of potential wide-reaching importance to national and EU policies on supplying and facilitating access to the Internet in an era of digitalisation.
Whether the Internet has the potential to provide collective actors with new channels to insert their claims effectively in the public sphere - without having to first pass through the mass media filter - is arguably a highly important question that may have far-reaching effects on the structure of politics in the near future. For the EU this seems to be of even greater potential relevance given the weakness of traditional mass media on the European level, on the one hand, and the inherently transnational mode of communication that the Internet seems to enable, on the other.
If we are able to show that this new media provide some efficacy as a form of dissemination of political information, or as an emergent forum for public debate and exchange (at times interactively with political institutions), then such findings will support the claims of those politicians advocating policies for increasing the level of access of the population to new media. Anyway, the findings from the Europub.com project will provide a greater understanding of the possibilities and limitations the Internet implies as an arena for political communication – in the national perspective and especially in the European perspective concerning an Europeanisation of political communication structures.

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Abbreviations

ADSL	Asymmetric Digital Subscriber Line
AOL	America Online
ART	Autorité de régulation des télécommunications (FR)
ASO	Address Supporting Organisation (ICANN)
BKA	Bundeskriminalamt (DE)
BT	British Telecom
CEO	Chief executive officer
CERT/A	Computer emergency response team/administration (FR)
CH21	Swiss Impulse Program (CH)
CNIL	Commission Nationale de l'Informatique et des Libertés (FR)
CNRS	National scientific research centre (FR)
ComCom	Federal Communications Commission (CH)
DNS	Domain name server
DNSO	Domain Name Supporting Organisation (ICANN)
DSL	Digital Subscriber Line
DTI	Department of Trade and Industry (UK)
ECDL	European diploma for basic information technology skills
EP	European Parliament
EPN	Electronic-highway Platform Nederland (NL)
EU	European Union
FOP	Federal Office of Police (CH)
FRIACO	Flat Rate Internet Access Call Origination
GAC	Governmental Advisory Committee
GATS	General Agreement on Trade in Services
GDP	Gross Domestic Product
ICANN	Internet Corporation for Assigned Numbers and Names
ICT	Information and Communication Technologies
INFO XXI	Spanish government programme for the Information Society (ES)
INRIA	Research Institute (FR)
IPR	Intellectual property rights
Ipv6	Internet protocol version 6
ISCG	Information Society Co-ordination Group (CH)
ISPA	Internet service providers association
ITU	International Telecommunications Union
IuKDG	Information and Communication Service Act (DE)
NHS	National Health Service (UK)
OECD	Org. for Economic Cooperation and Development
OFCOM	Regulator for the telecommunications industry (UK)
OFCOM	Federal Office for Communications (CH)
OFT	Office of Fair Trading (UK)
Oftel	Office of Telecommunications (UK)
ONP	Open Telecommunications Network (EU)
OPTA	Independent Post and Telecommunication Authority (NL)
PAGSI	Plan gouvernemental d'action pour la société de l'information (FR)
PC	Personal computer
PELS	Platform for electronic voting (NL)
PPP	Purchasing power parities
PSO	Protocol Supporting Organisation (ICANN)
PSTN	Public switched telephone network

RIP	Regulation of Investigatory Powers (UK)
TCP/IP	Internet networking protocols
TEC	Treaty on the European Union
TEN	Trans-European networks
TLD	Top level domain
TV	Television
US	United States of America
USD	US dollar
VAT	Value added tax
WAP	Wireless application protocol
WIPO	World Intellectual Property Organisation
WRR	Scientific Council for Government Policy (NL)
xDSL	Generic term for different types of DSL