

欧盟中国商会《周·知》

WEEKLY UPDATES

Special Issue on EU's digital Transformation in 2020

Editor's note: A new wave of digitization is sweeping the world, bringing the European Union's decades-long digital transformation to the key "crossroads." Brussels is now doubling down on digitalization, hoping to achieve its "digital sovereignty" and eyeing a "digital decade" starting from now. This special issue of "Weekly Updates" aims to give a glimpse of the brief history of EU's digital transition and its major moves in digital domain this year. Enjoy your reading and have a nice weekend!

Europe, where the pandemic turns out to rage more severely than most parts of the world, may have a deeper understanding of the significance of digital transformation to social and economic stability and long-term development.

When the first wave of COVID-19 hit Europe at the beginning of the year, working from home and other lockdown measures helped skyrocket internet usage. At some point, Brussels had to call on Internet giants including Netflix, Amazon, and YouTube to lower video qualities in Europe to avoid network collapse.

This incident mirrors Europe's uneasiness in the digital era. Europe hosts a fleet of advanced economies but its digital performance is somehow dwarfed. On the one hand, Europe boasts higher Internet penetration rates than any other regions in the world, its talent pool and R&D achievements are also impressive, but on the other hand, the continent is faced with an increasing risk of lagging behind.

Not only has it failed to grow technology giants that can rival American GAF A (Google, Amazon, Facebook, and Apple) and China's BAT (Baidu, Alibaba, and Tencent), it is also in urgent need to upgrade its digital infrastructure, prevent possible brain drain, and overall gear up in the global digital competition.

The EU's digital strategies have undergone a 20-year evolution from the "Lisbon Strategy" to the "Europe 2020 Strategy". In the "Lisbon Strategy" that was issued back in 2000, the EU has recognized that technological innovation and R&D in the Internet era could forge the engine of future growth. It proposed to increase investment in scientific research (increasing the proportion of GDP from 1.9% to 3%) to promote the development of an innovative knowledge economy.

In 2010, the EU issued the "Europe 2020 Strategy", in which digital transition was much more visible. In 2015, Brussels vowed to develop a "single digital market". Later, in recent years, the digital transformation centered on intelligence has presented new challenges to the EU. At the same time, the rivalry between China and the U.S. over areas such as 5G, digital economy, artificial intelligence, big data, Internet of Things, supercomputing, quantum communications and blockchain has further put butterflies into Europe's stomach.

According to the United Nations "[Digital Economy Report 2019](#)", US and China account for 90% of the market capitalization value of the world's 70 largest digital platforms, with Europe sharing some 4%. Another one, on AI, Chinese start-ups have attracted nearly half of the global investment,



The China Chamber of Commerce to the EU (CCCEU) is a platform between China and the EU and it serves the best interests of Chinese enterprises investing in the EU. Established in August 2018, the CCCEU speaks on behalf of its 62 members and represents about one thousand Chinese enterprises.

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excelling in fields like big data and facial recognition, while the U.S. retains its leading role in talents, researches, and hardware.

Against the backdrop, the new EU leadership has put digital transformation as one of the two “priorities” (the other is the green deal), and shined the spotlight on the “digital sovereignty”.

The European Commission pointed out that the EU’s “digital sovereignty” focuses on three areas: data, technology, and infrastructure. In detail, it covers nine key areas, namely AI, data strategy, industrial strategy, high-performance computing, cybersecurity, digital skills, connectivity, plus the Digital Market Act and the Digital Services Act that were just released this week.

Since the beginning of this year, the EU has intensively issued policy documents and regulations in the above areas. Here is a recap:

January

On 29 January, the Commission published the EU toolbox on 5G cybersecurity, in which it outlined a set of key actions to ensure the security of the networks, such as limiting dependency on a single supplier and assessing the risk profile of supplies.

February

The Commission published a European strategy for data, A white paper on artificial intelligence, as well as a communication entitled 'Shaping Europe's digital future'.

March

The Commission proposed the 'New Industrial Strategy for Europe', which aims to navigate European industries through the Green and digital transformation and give a boost to the European industries' global competitiveness.

April

European leaders worked out an EU roadmap to tackle COVID-19, attaching great importance to digital tools for remote connection, working from home, contact tracing and so forth.

May

The digital transition was mentioned as being key to recovery in the Franco-German paper on an initiative for European recovery from the coronavirus crisis, published in May.

June

EU member states hammered out an agreement on the interoperability of tracking software. On June 11, the Commission released this year’s version of the Digital Economy and Society Index (DESI) showing that all EU member states had made progress in key digital areas such as infrastructure and digital skills. Finland, Sweden, and Denmark ranked top three concerning digital performance.

July

European leaders clinched a deal on a stimulus package consisting of the 2021-2017 EU budget and an economic recovery plan, prioritizing green and digital transition.

September

The special committee on AI set up by the European Parliament started its one-year mandate in September. European Commission President Von der Leyen made her debut for the State of the Union Speech, announcing that 8 billion euros will be invested in the high-performance computing. She said the EU will also promote cloud computing, AI, 5G, 6G, EU e-ID and other key tech advances. The Commission later released the digital finance strategy involving crypto-assets, digital sustainability, and retail payments.

October

[During a special meeting of the European Council](#), EU leaders discussed 5G and urged the acceleration of 5G deployment. They also agreed that at least 20% of the funds under the Recovery and Resilience Facility would be made available for the digital transition, including for SMEs. In Frankfurt, [the European Central Bank](#) released a report exploring the feasibility of a digital euro.

November

The Commission issued the [Data Governance Act](#) to establish a legislative framework for the "Data Act" scheduled next year. EU Internal Market Commissioner Thierry Breton said "[our regulation will help Europe become the world's number one data continent.](#)"

December

The Commission proposed an ambitious reform of the digital space, a comprehensive set of new rules for all digital services, including social media, online market places, and other online platforms that operate in the European Union: the [Digital Services Act](#) and the [Digital Markets Act](#).

In addition, the negotiators of the Council and of the European Parliament on December 14 struck a provisional deal on a new program, Digital Europe, which will promote the large-scale deployment of state-of-the-art technology, such as artificial intelligence and the latest cybersecurity tools, to speed up the digital transformation of European societies and economies.

It is evident that the EU is keen to seize the valuable opportunity presented by the vast industrial data and seek to plunge investment to close the gap on key strategic areas such as AI to maintain its competitive edge.

Another vital aspect of the EU's "digital sovereignty" is all about making rules. Take GDPR, Brussels does have a great say on making regulations of global influence. For now, the EU is playing the role of a strict "referee", should it be the cases of Google, Facebook, Amazon, and other global digital behemoths.

For next year, Brussels already plans to put several major proposals and regulations on the table.

In the first three months, the Commission is set to present 'Europe's Digital Decade: 2030 Digital Targets' and put forward a proposal on the EU e-ID.

Between April and June, the Commission will set out 'digital levy and a proposal for digital levy as own resource' and update the European industrial strategy.

It also plans to present legislation on foreign subsidies and public procurement during the second quarter.

Brussels mulls to get the long-awaited Data Act ready by August.

《周·知》 | 2020：疫情肆虐中，欧盟再启数字转型

编前语：绿色和数字化转型是欧盟经济现代化的核心双轮。欧洲国家懊悔错过第一波以个人数据为核心的“数字经济”，现在则押宝在其富有优势的工业数据富矿上，希望在万物互联时代抓住先机，并通过资金倾斜、加强研发和规则制定等手段掌握更多欧洲“数字自主”，打造黄金“数字十年”。本期《周·知》特别关注欧盟数字化转型进程，重点盘点今年以来的疫情背景下欧盟数字化驱动经济转型之路，分析未来欧盟在该领域的关键政策。感谢阅读，订阅双语版请致信 info@cceu.eu，祝您周末愉快！

今年，疫情比全球大多地区严重的欧洲，对数字化转型于社会经济稳定和长远发展之重要性有了更深刻和更痛彻的认知。年初欧洲第一波疫情来袭时，居家办公和封锁措施使互联网流量使用翻倍不止，欧盟不得不号召互联网巨头包括 Netflix、Amazon 和 YouTube 等公司调低欧洲地区视频码率，以免网络崩溃。

该事件折射出欧洲在数字领域发展的尴尬地位。欧洲地区发达国家群集，2018 年欧盟成员国 GDP 总量占美国 91%，是世界第二大经济体，但其数字领域发展却与其经济实力不匹配。一方面，欧洲数字化仍“家底殷实”，比如欧洲是全世界互联网普及率（Internet penetration rate）最高地区之一，尤其是北欧和西欧国家普遍高达 90% 以上，其人才储备和技术研发也一骑绝尘；但另一方面，欧洲面临“掉队”风险，不仅没有生长出能媲美美国 GAF A（Google、Amazon、Facebook 和苹果）和中国 BAT（百度、阿里巴巴和腾讯）的科技巨头，还面临基础设施亟待升级、人才流失、投资不足和全球竞争加剧等挑战。

欧盟自身数字战略经历了从“里斯本战略”到“欧洲 2020 战略”长达二十年演变。2000 年，欧盟成员国首脑在葡萄牙首都里斯本通过首份十年经济发展规划即“里斯本战略”，彼时虽还没有“数字革命”等说法，但欧盟已经认识到互联网时代科技创新和研发是经济增长的重要引擎。“里斯本战略”提出要提高科研投入（GDP 占比从 1.9% 提高到 3%）促进创新型知识经济发展；2010 年，欧盟又出台“欧洲 2020 战略”，其中促进数字发展规划内容相比“里斯本战略”明显加重，这也推动了 2015 年，欧盟开始寻求发展区域内的“单一数字市场”，以进一步整合欧盟内部力量。

“欧洲 2020 战略”发展后期，即近年以来，以智能化为核心的数字转型对欧盟数字战略提出新挑战。同时中美在 5G、数字经济、人工智能、大数据、物联网、超算、量子通信、区域链等领域的你追我赶更使欧盟感受巨大压力。比如据联合国《2019 年数字经济报告》，中美占据全球 70 个最大数字平台市值的 90%，而欧洲份额仅为 4%；再如在人工智能领域，中国初创企业吸引全球近一半投资，并在大数据和面部识别等领域占有优势，美国则在人才、科研、开发和硬件等方面保持领先。

在全球数字竞争加剧背景下，2019 年末上台的欧盟新一届领导层把数字转型确立为欧盟首要两大“优先事项”之一（另一个是绿色转型），并且把发展“数字主权”放在聚光灯中心。“数字主权”与欧盟寻求“战略自主”思想相契合，用欧盟自己话来说，其出发点是“确保我们的数据基础设施、网络和通信完整性和恢复力。这就需要创造正确条件，让欧洲发展部署关键能力，减少对全球其它地区关键技术依赖。这些将加强欧洲在数字时代定义自身规则和价值观的能力。”

欧委会指出，欧盟“数字主权”聚焦数据、技术和基础设施三大领域，其数字领域可细分则包括人工智能、数据战略、工业战略、高性能计算机、网络安全、数字技能、互联互通，以及本周刚刚发布的数字市场法案和数字服务法案等九大版块。今年以来，尽管疫情暴发，欧盟仍密集出台在以上领域政策文件和法规，深化新格局下着眼未来十年的数字布局。以下则是欧盟今年以来加强欧洲自觉和欧洲自主，在数字领域推出的系列举措。

一月

欧委会于 29 日发布应对 5G 网络安全风险工具箱。该工具箱包括战略和技术措施，解决包括与非技术因素风险（例如非欧盟国家或国家支持的参与者通过 5G 供应链进行干扰的风险）在内的所有已评估出的风险。

二月

欧委会同时推出《塑造欧洲的数字未来》《欧洲数据战略》和《人工智能白皮书》三个战略文件，旨在通过完善数据可用性、数据共享、网络基础设施、研究和创新投资等，帮助欧盟完成数字单一市场建设，在数字经济领域成为比肩中美的另一极。

三月

欧委会提出新欧洲工业战略一揽子计划，旨在指导欧洲工业实现气候中立和数字领军双重转型，增强欧盟在全球产业竞赛的竞争力和地缘政治角逐的战略自主性。

四月

欧盟发布了应对新冠疫情、恢复经济的“欧盟路线图”，其中提到危机期间，数字工具和远程连接对政府、企业和保持社会运转的重要性。当月，欧盟发布了针对追踪软件和隐私保护等方面的工具箱。

五月

法德发布联合倡议，提到要把数字化转型作为恢复欧洲经济的重点。此外，欧委会发布了数据保护指导方针。

六月

欧盟成员国就跟踪软件等的互通性达成一致。6月11日，欧委会发布《2020 数字经济与社会指数 (DESI) 结果》报告显示，欧盟成员国在关键数字领域如基础设施、数字技能、数字政务等方面取得经济进展，芬兰、瑞典和丹麦在欧盟数字发展表现上排名前三。

七月

欧洲理事会就经济刺激一揽子计划（包括 2021-2017 欧盟预算和经济复苏计划）达成一致，气候变化和数字化成为重点支持领域。

八月

欧洲暑期，略。

九月

欧洲议会人工智能委员会开始运行；欧委会主席冯德莱恩发表上任后首次“盟情咨文”讲话，提到欧洲“必须引领数字化发展”。期间，她宣布将向超级计算机技术领域投资 80 亿欧元资金，以及促进云计算、人工智能、5G 和 6G 开发部署和欧盟电子身份证等多项数字领域重要措施。当月，欧委会还发布数字金融战略，涉及加密货币、数字可持续性和零售业支付等。

十月

欧盟首脑讨论 5G 问题，强调“潜在的 5G 供应商需根据共同客观标准进行评估”，并要求成员国加快部署 5G。同时，欧洲理事会也表示支持划拨复兴措施基金 (Recovery and Resilience Facility) 中 20% 到数字领域。当月，欧洲央行发布报告探讨数字欧元可行性。

十一月

欧委会发布了关于数据治理的提案(Data Governance Act)，为明年颁布《数据法案》搭建立法框架。欧盟内部市场委员布雷顿表示，这些规定将“帮助欧洲成为世界上最大的数据大陆”。

十二月

欧委会在本周提交了两部筹划已久的新数字法案：《数字服务法》和《数字市场法》，旨在监管在欧盟境内运行的社交媒体、在线市场和其他在线平台监管。此外，欧洲理事会和欧洲议会 12 月 14 日还就“数字欧洲”达成临时协议。

欧盟渴求在“第二波”数据经济发展中抓住欧盟在工业数据上的优势，通过加大资金投入和提高研发支出来保持在人才、技术等领域既有优势，缩短和美国、中国在人工智能、超级计算机等部分领域的差距，使欧盟产业和工业抓住第四次工业革命发展机遇，保持欧盟在全球范围内的竞争力。同时，欧盟“数字自主”的重要内容之一是规则制定。欧盟在规则制定上具有较强的全球话语权，其 GDPR 引领了在全球个人数据隐私保护上的严格规则。当前，在管制世界互联网巨头上，欧盟也把做好一个“裁判”作为新时期角色定位，试图通过规则制定扩大欧盟在数字领域的全球影响力，进一步提高其“战略自主”。

明年，欧盟也将在以下重点数字领域有所行动，这包括：欧委会将在第一季度推出“欧洲数字十年：2020 数字目标”；提出欧盟电子 ID 提案。此外，欧委会还将提出“提高平台工人工作条件”提案等。第二季度，欧委会将推出数字征税领域提案（Digital levy and a proposal for digital levy as own resource）；此外，欧委会还将更新欧洲工业战略；针对外国政府补贴和公共采购提出立法提案等。第三季度，欧委会将推出数据法提案。第四季度，欧委会则将提出电子产品新设计要求和消费者权利方面提案。