



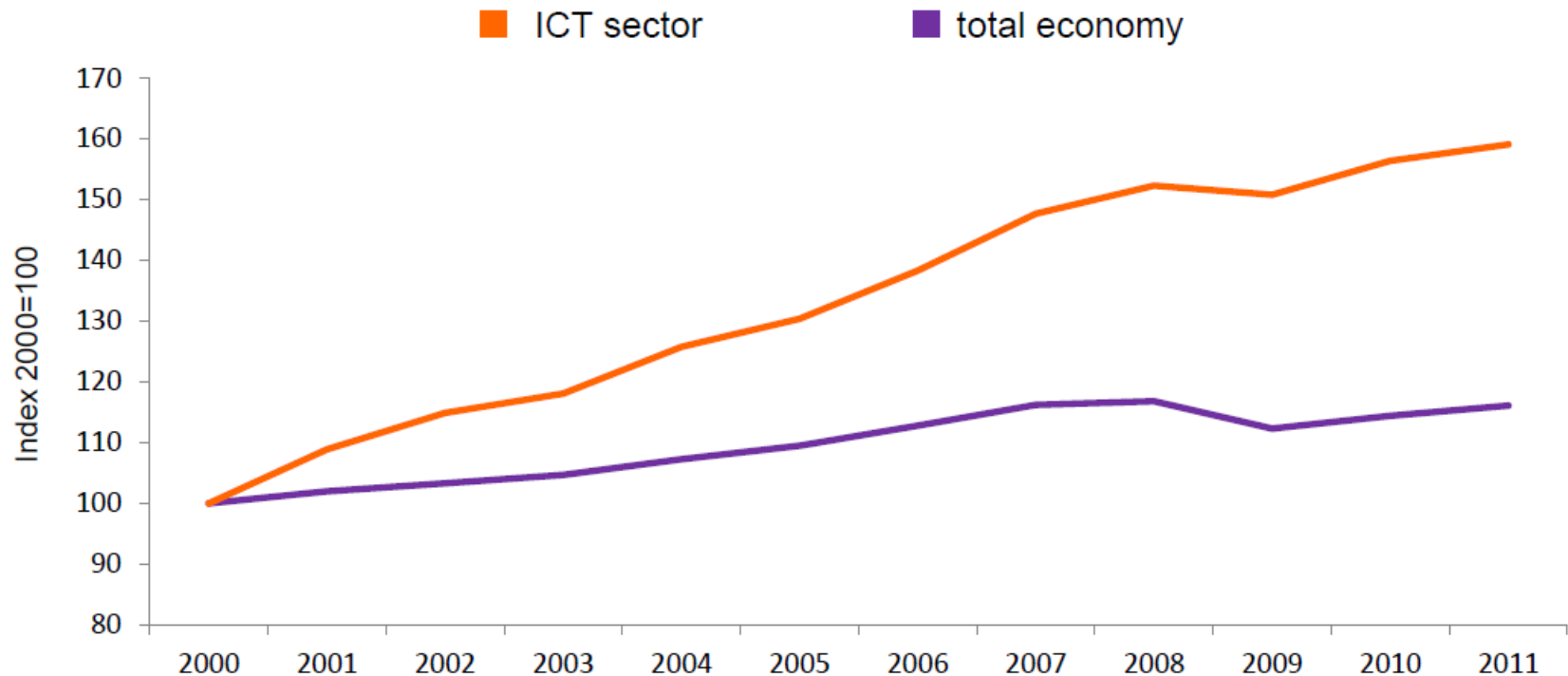
Monitoring the Digital Agenda for Europe

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Head of Information Society and Media,
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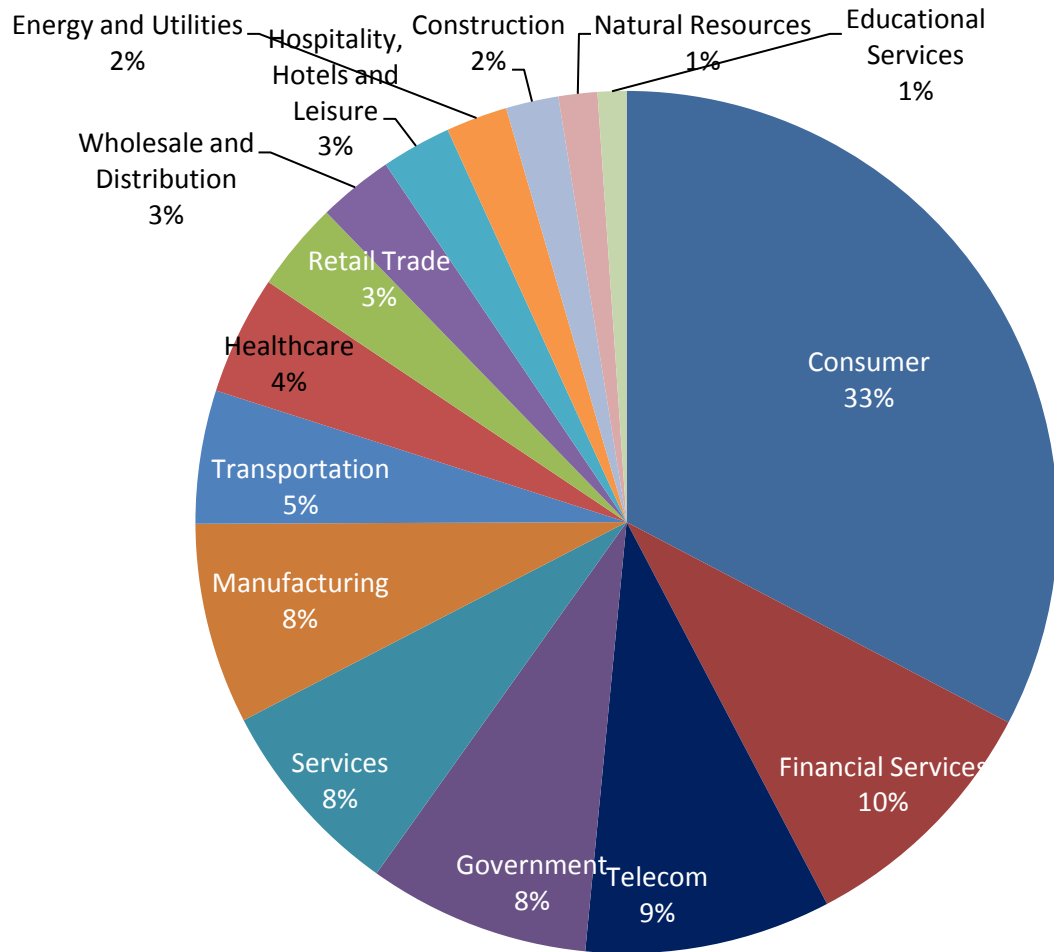
Why digital matters to Europe?

ICT sector is an increasing share of EU economy



Evolution of gross value added of the ICT sector in the EU (index 2000 = 100)
Source: European Commission

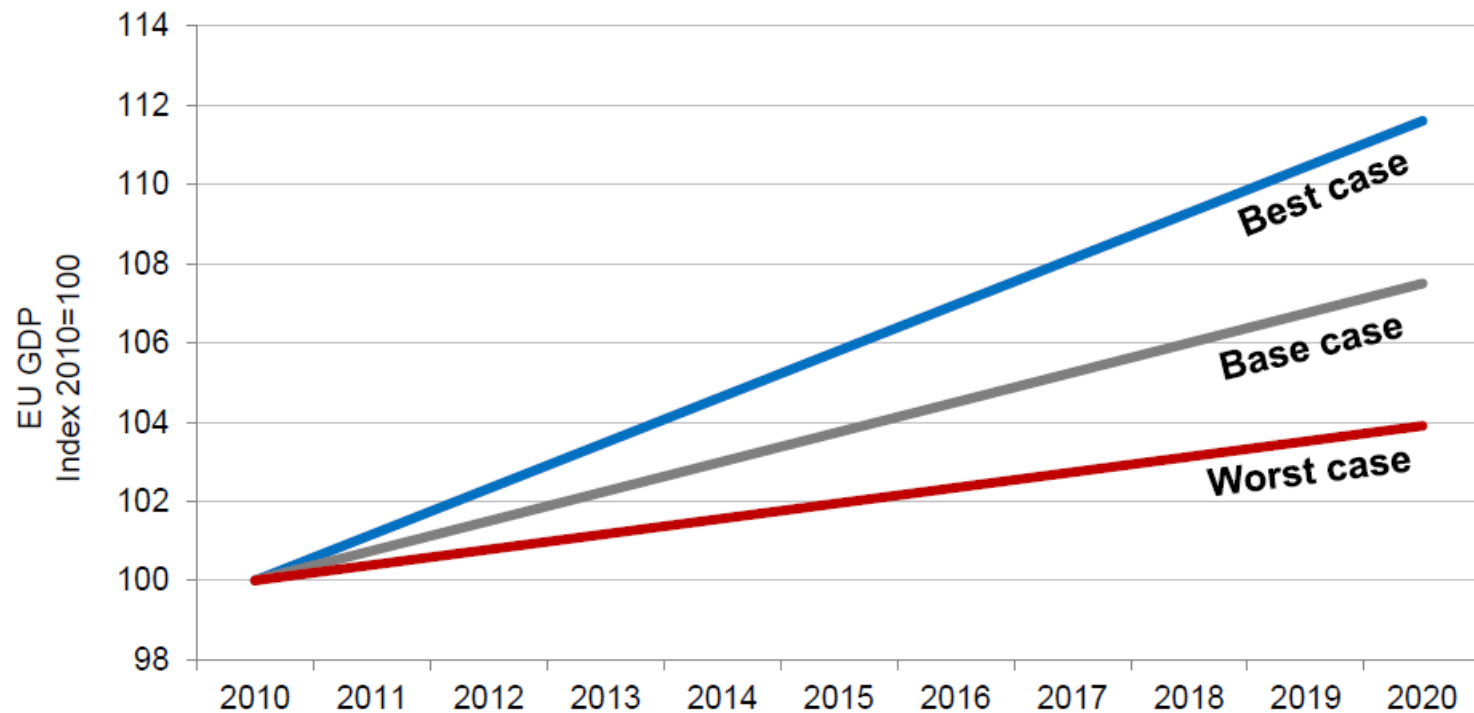
All sectors are dependent on ICT



ICT spending by category of actors (% of total spending on ICT in 2012)

Source: OECD

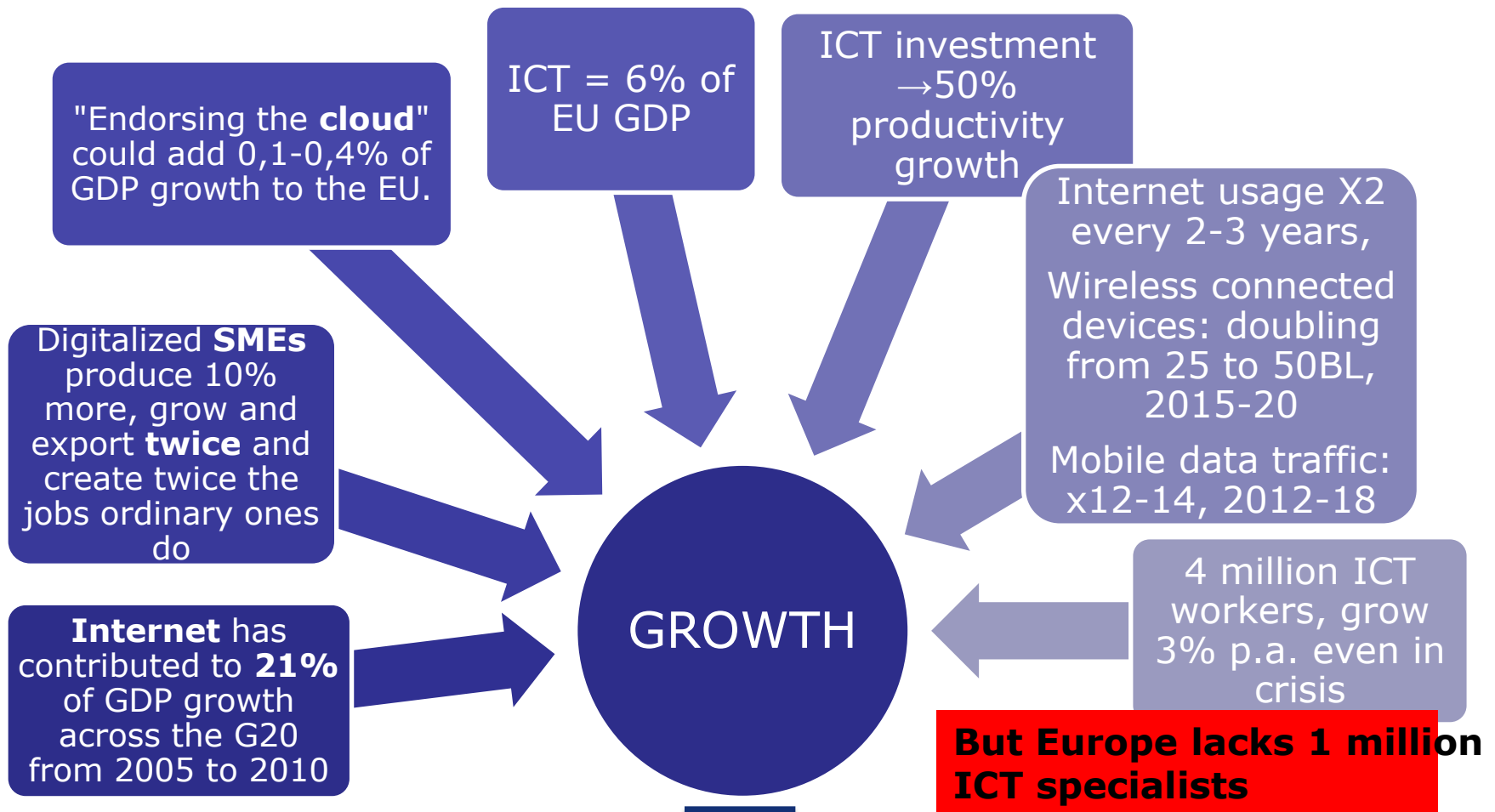
Digital economy could add 4% to EU GDP by 2020



Digital economy-related GDP growth in the EU

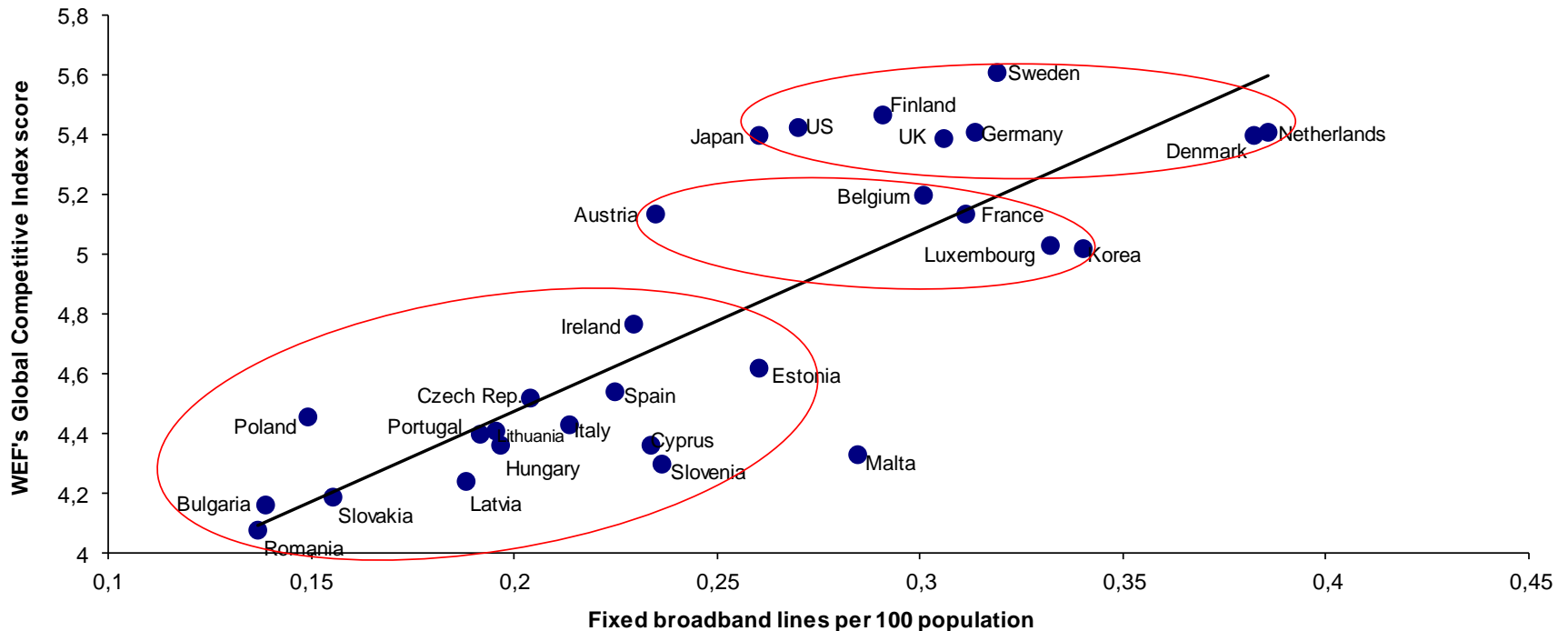
Source: Copenhagen Economics

Why ICT matters



Investing in Broadband pays off

Correlation Fixed Broadband Penetration and Competitiveness



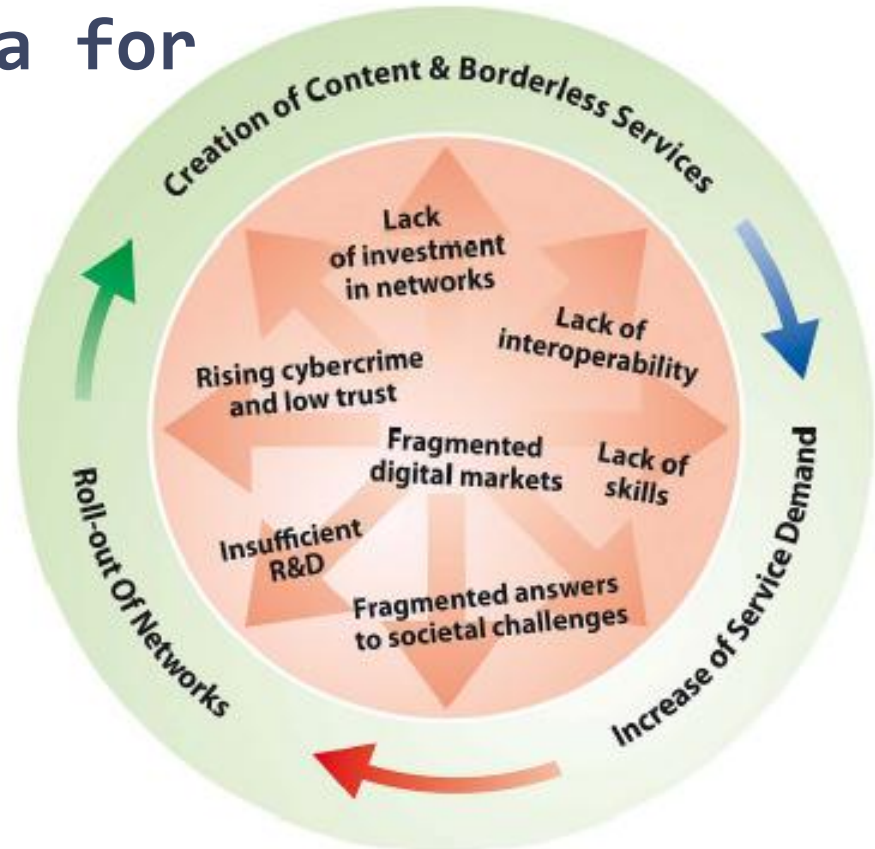
A 10% increase in the broadband penetration rate results in 1 to 1.5% increase in annual GDP per-capita. Faster broadband = higher GDP growth.

Source: Czernich et al. - University of Munich, 2009

What was the European Union's response?



"The Digital Agenda for Europe"



Digital Single Market



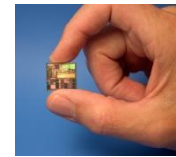
Interoperab. & standards



Trust & security



Very fast Internet



Research & Innovation



Enhancing e-skills



ICT for social challenges





Trust and security

40% citizens not assured to spread data over internet

38% citizens not assured to pay over internet

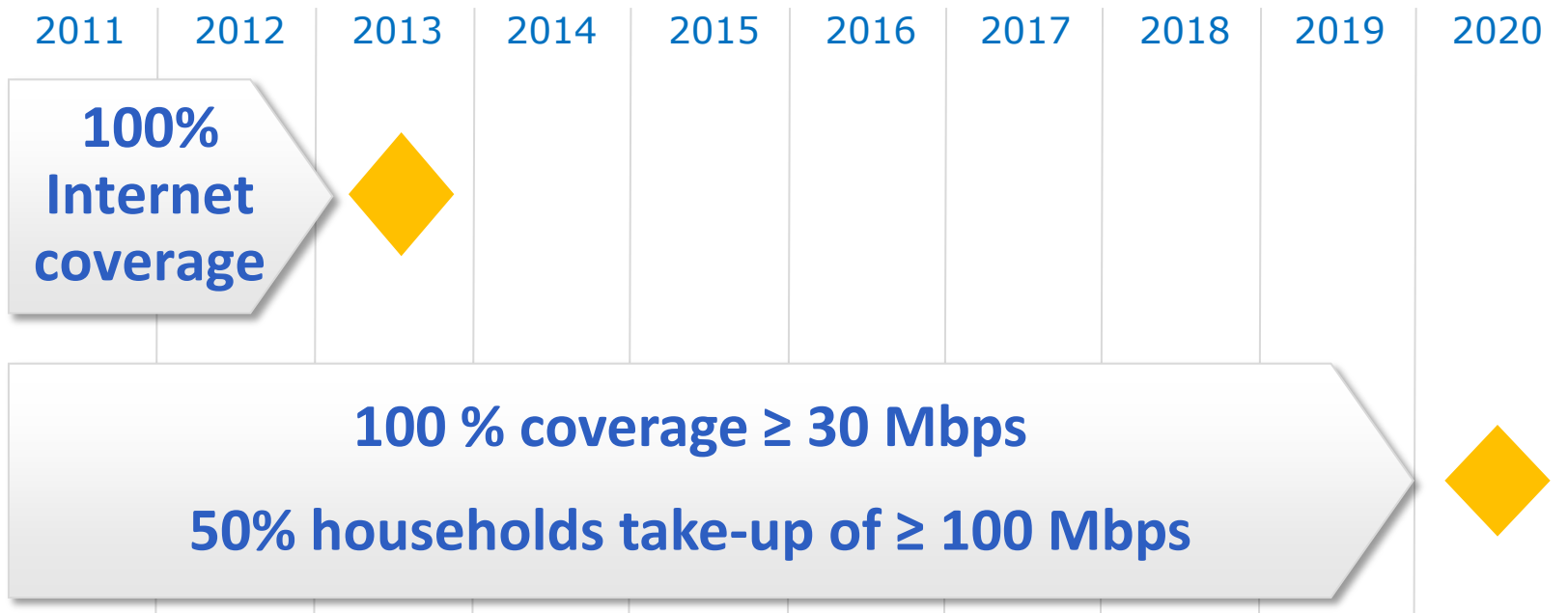
16% enterprises experienced threats to their internet-based systems

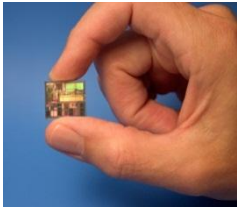
Trust

Risks of Disruption of critical networks and online business activities.
Local approaches not sufficient



Very fast Internet



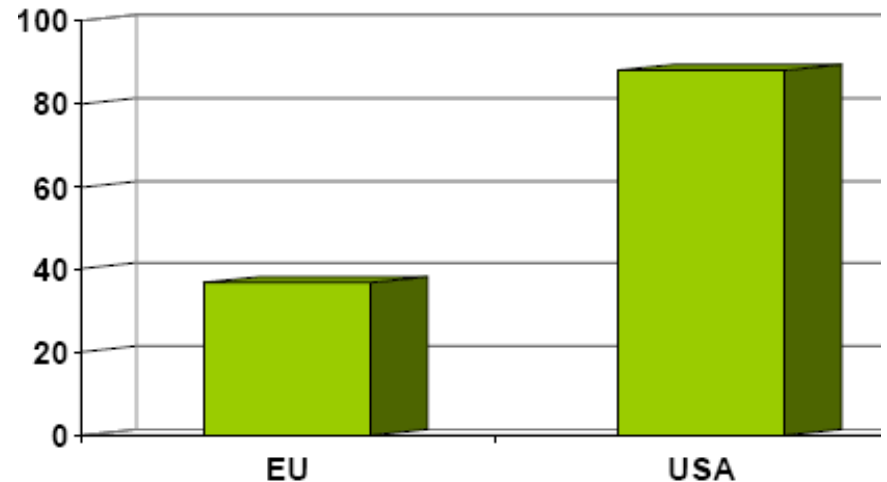


Research and innovation

Funds

- 2x investment to
11 bn €
- Light & fast access

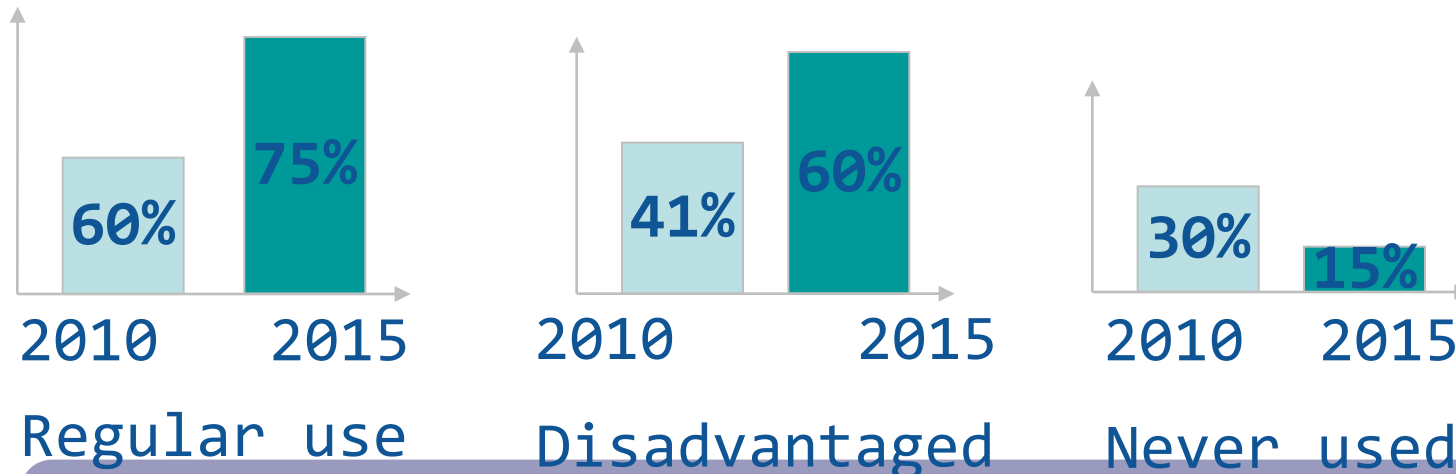
Coordination





Enhancing e-skills

Get more people on-line



eSkills training



ICT for social challenges

Environment

Health

eGovernment

Cultural diversity & creative content

Intelligent Transport

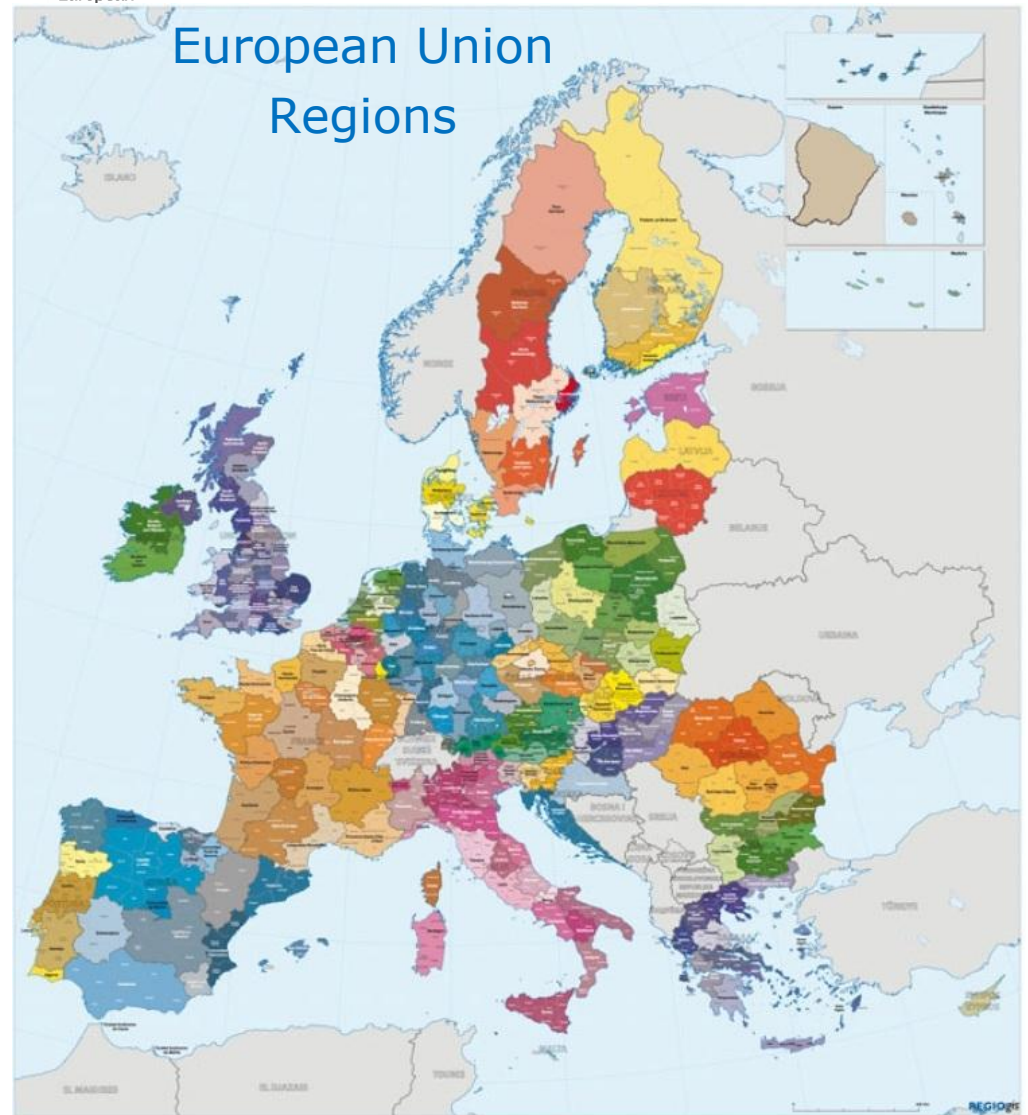


National and Regional Digital Agendas

Many national and regional authorities have implemented digital strategies.

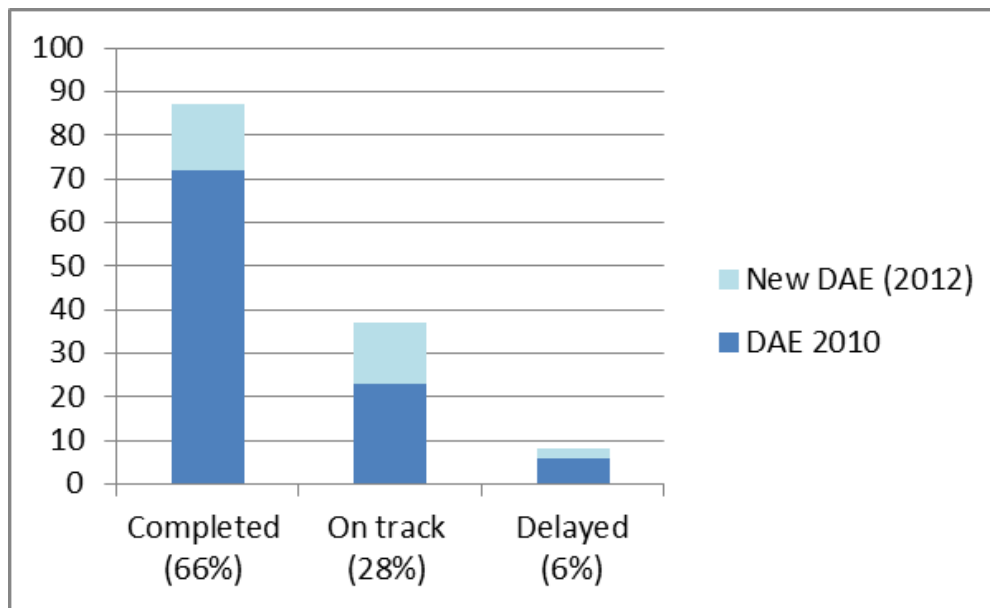
They reflect key DAE priorities:

- investment in broadband infrastructure
- ICT enterprises
- e-Government
- e-Health, inclusion and accessibility.

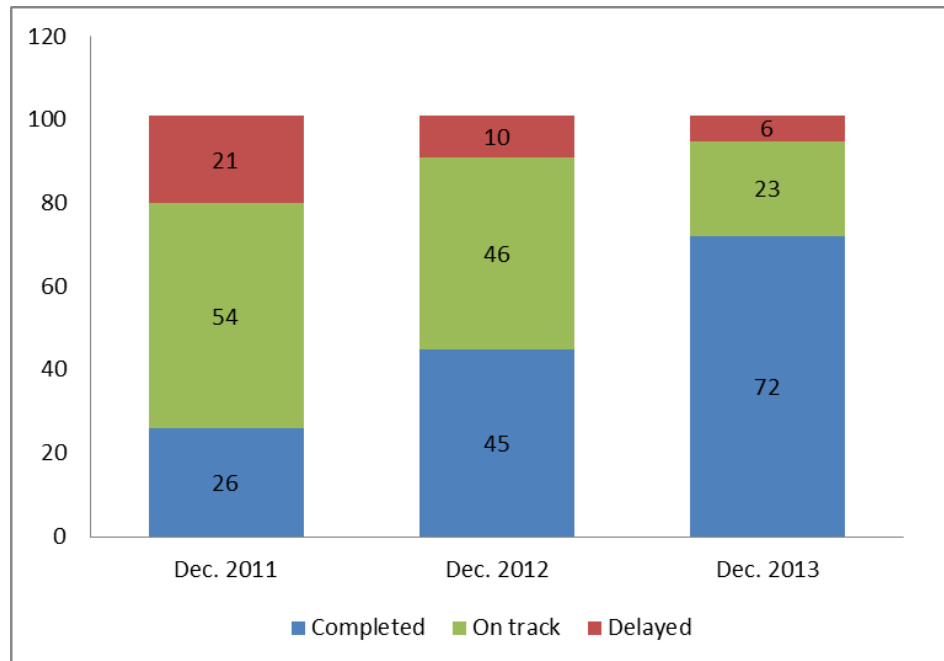


DAE Results So Far?

Status of DAE actions (including review actions) in December 2013



Progress of DAE original actions since 2011

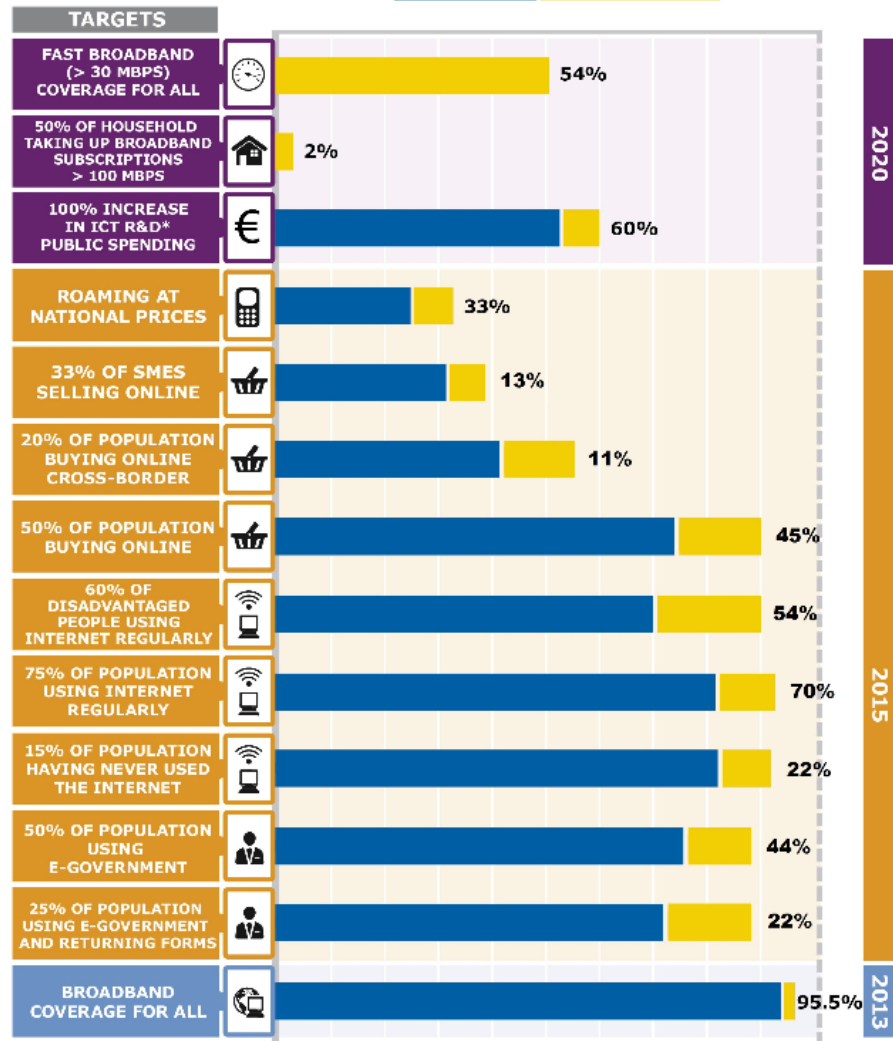




European
Commission

Starting point Progress 2009-2012

Progress with respect to the targets set out in the Digital Agenda
(Scoreboard)

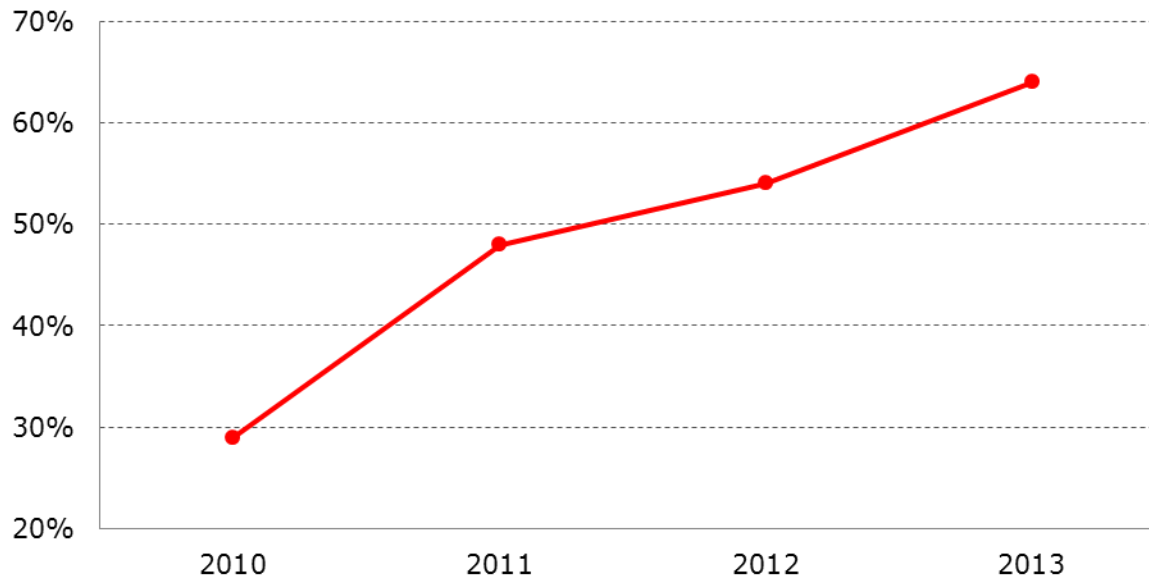


*R&D: Research & Development

Digital Agenda – 2014 Scoreboard

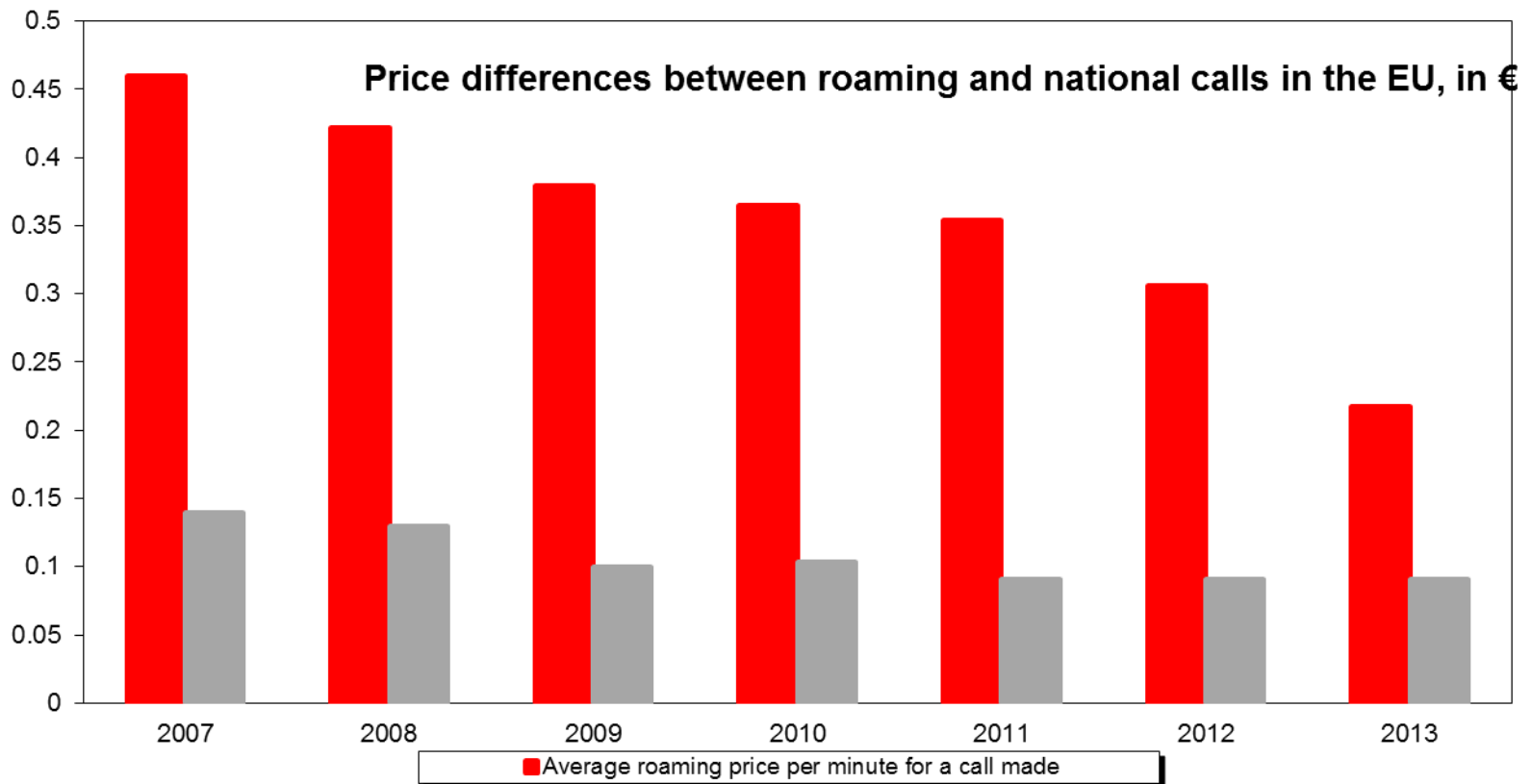
NGA COVERAGE: at least 30 Mbps connections available to 64%, up from 54% a year ago

NGA broadband coverage in the EU, 2010-2013



Digital Agenda – 2014 Scoreboard

- ROAMING: Tariffs down thanks to EU legislation

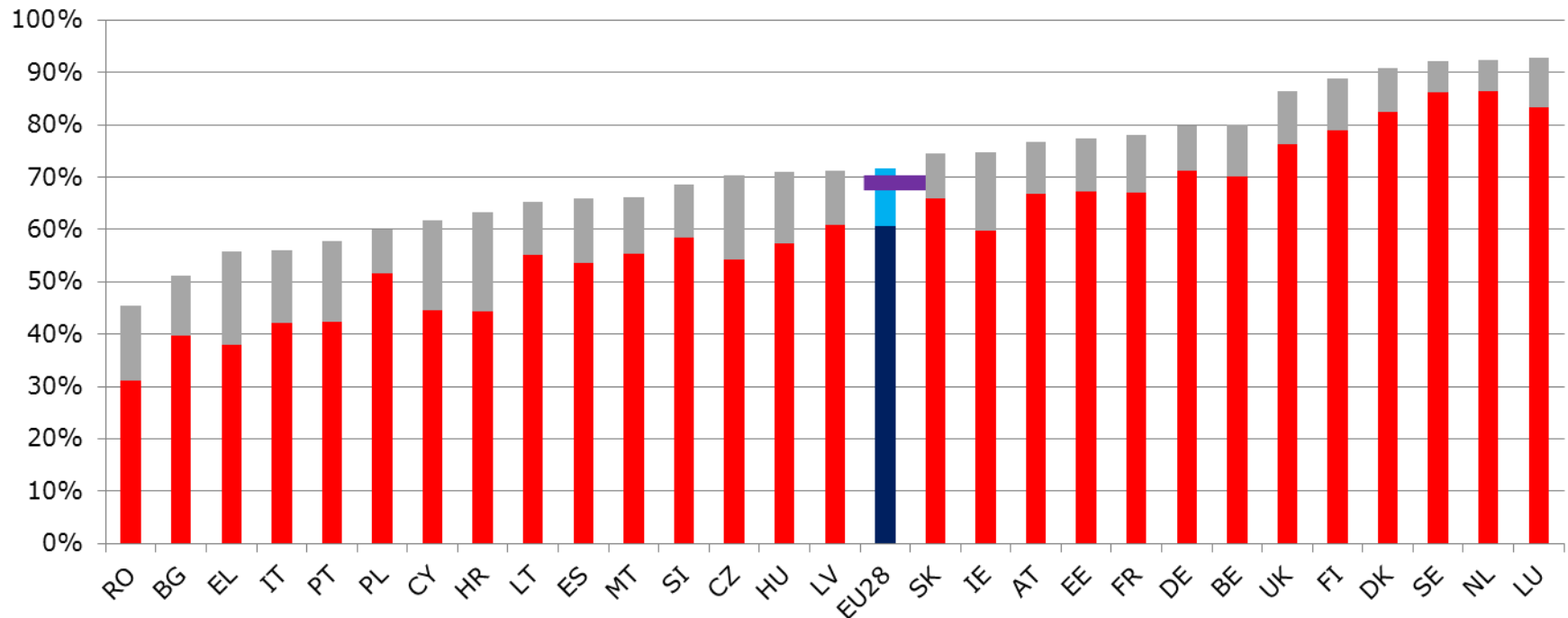


Digital Agenda – 2014 Scoreboard

- EVERY EUROPEAN CITIZEN DIGITAL: Progress continues = +12% since 2010

Regular Internet Users (at least once a week) in %

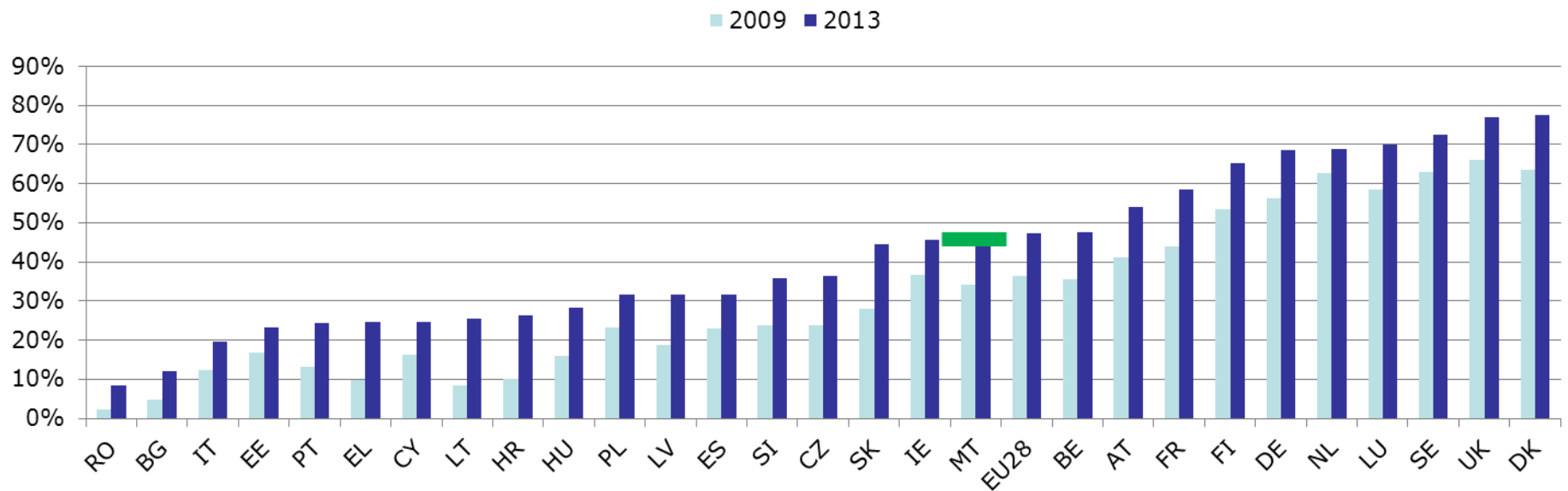
■ 2009 ■ increase by 2013



Digital Agenda – 2014 Scoreboard

- eCommerce: Growth continues = +10% since 2009
- BUT less so cross-border (only +4 %) !

Online shopping by citizens (% of individuals)

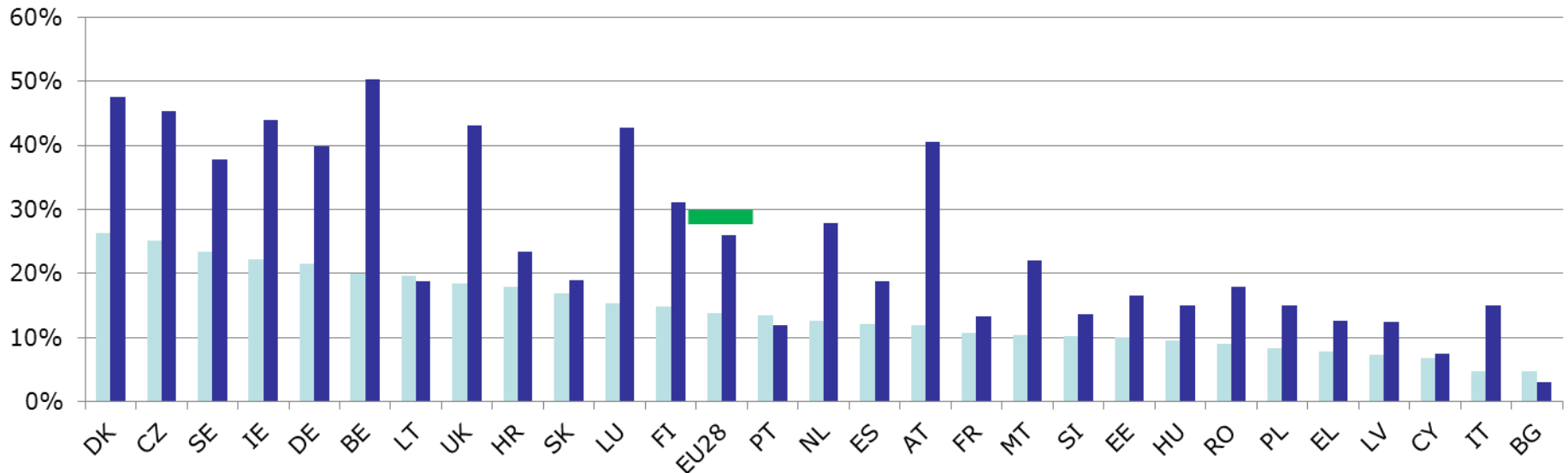


Digital Agenda – 2014 Scoreboard

SMEs are hardly exploiting the Internet for sales:
only 14% of European SMEs sell online (+2%)

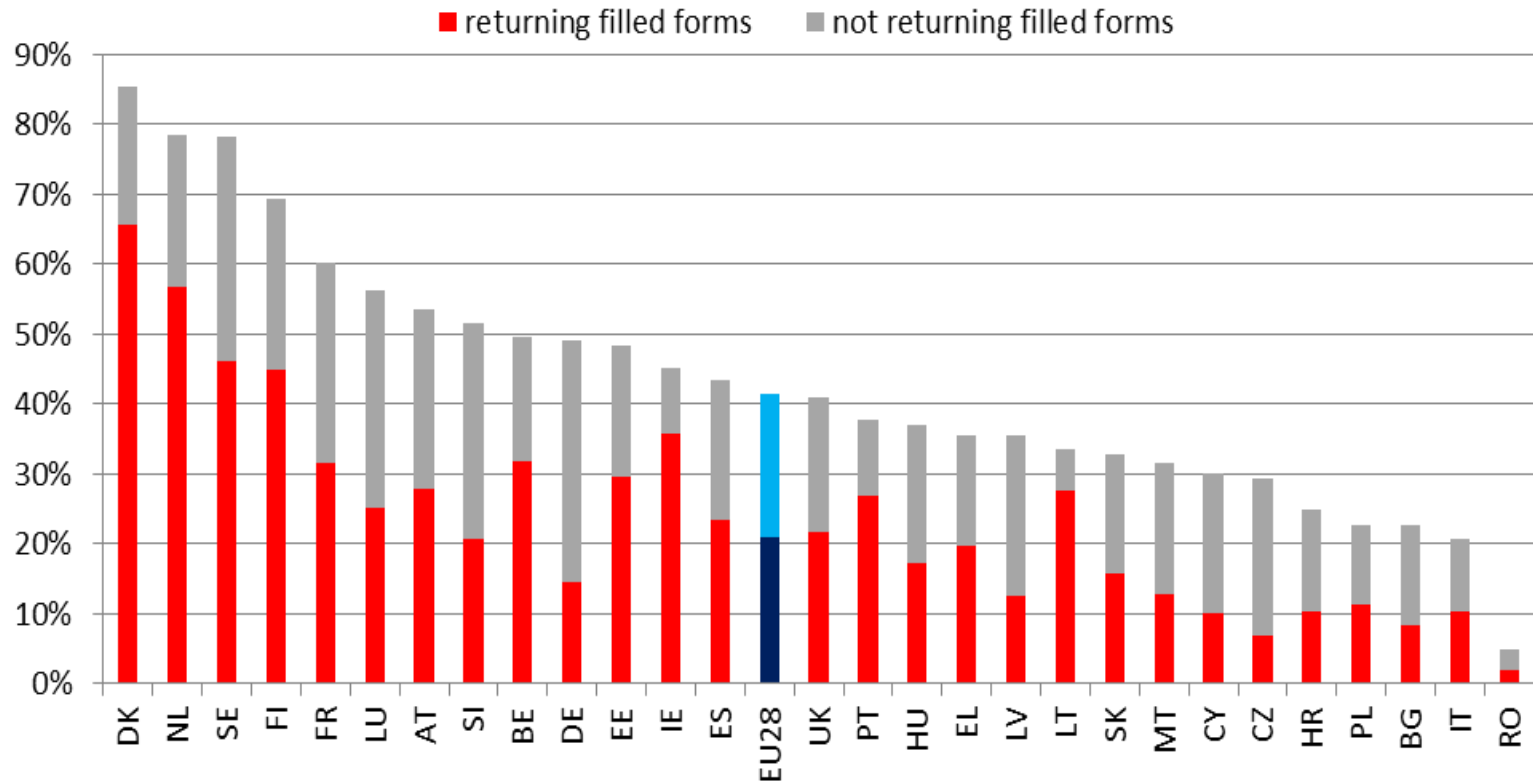
eCommerce - SMEs selling/buying online in 2012, in %

■ online sales \geq 1% of turnover ■ online purchases \geq 1% of turnover



Digital Agenda – 2014 Scoreboard

Use of eGovernment by individuals, 2013 (% of individuals)





European
Commission

What next?

Achieving Connected Continent would mean for...

JOBS

<i>In telecoms sector</i>	Reverse unsustainable status quo
<i>In ICT</i>	Nearly 1 million unfilled digital jobs available
<i>In wider economy</i>	2 million jobs by 2020

GROWTH

<i>From the digital agenda</i>	4% on GDP by 2020
<i>From a telecoms single market</i>	€110 billion / year
<i>For all sectors of economy</i>	Connectivity: life blood of economy

Telecom Single Market (TSM): Aims

- Contribute to a **single market based on freedoms** of providers and consumers to act across borders
- Address remaining barriers with focused measures building on the **current framework**
- Maintain **market regulation** based on competition principles
- Safeguard **open internet**, while leaving space for innovation
- Enable **economies of scale** to be passed to consumers without prejudicing efficient operators of **any size**

TSM: Key Measures

- **Single consumer space**
 - Open Internet: **net neutrality**
 - Harmonised **end-user rights** and easier switching
 - End to **roaming**
- **European inputs for high-speed broadband**
 - Wireless: **spectrum** coordination; facilitating small cells
 - Fixed: European **virtual access** products
- **Single EU authorisation**
 - Simplified and more convergent regulation



Thank you!

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Digital Agenda Scoreboard 2014

