



The functioning and usability of the Points of Single Contact under the Services Directive – State of Play and Way Forward

Final report



**EUROPEAN COMMISSION,
DIRECTORATE GENERAL FOR
INTERNAL MARKET AND
SERVICES**

DG MARKT/2010/22/E

(SMART 2007/035, LOT 4)

Final Report

21-01-2012

This study has been commissioned by the European Commission, Directorate-General Internal Market and Services. All views expressed in this document, however, are those of the authors and do not necessarily reflect the views of the European Commission.

Neither the European Commission nor any person acting on its behalf is responsible for the use which might be made of the information contained in the present publication.

The European Commission is not responsible for the external websites referred to in this publication.

© European Union, 2012

Executive Summary

Purpose of the study

The Services Directive was adopted in 2006 to address many of the obstacles facing European service providers in the different service sectors. The Services Directive aims to simplify procedures and formalities, remove unjustified and disproportionate burdens, facilitate establishment abroad, and foster cross-border provision.

By the end of 2009, the Directive obliged each Member State to set up a fully operational Point of Single Contact to serve service providers. Each Point of Single Contact is to operate as a "gateway" or "one-stop-shop for business". It should be influenced not only by the legal imperatives of the Services Directive, but also by requests coming from the business communities.

This study provides a preliminary assessment of the implementation of the Points of Single Contact in the Member States and the EEA EFTA countries. The study lays out a state-of-play overview of the Points of Single Contact. It provides a methodology for the comparison and critical examination of the Member States' Point of Single Contact solutions.

It is anticipated that the study results can be used as a basis for further policy development in the area of administrative simplification and eGovernment for businesses in terms of what Points of Single Contact have to offer.

The practical needs and expectations of Point of Single Contact users lie at the heart of the analysis.

This study offers a comprehensive overview of the status of the EU27 Points of Single Contact.

Purpose of the document

This final report brings together the findings, conclusions and recommendations of this study with relation to the Points of Single Contact and their usefulness for businesses.

The overall findings are presented in terms of the three different domains and services offered by the portals: their availability and quality; their use and usability; and the back office enablers. Good practices are highlighted for different aspects of Point of Single Contact services.

A set of possible policy recommendations are laid out. They involve two concrete and practical potential "to do" lists that detail means of enhancing aspects of the Points of Single Contact at both the national and the EU levels.

The study outlines some potential next steps for administrative simplification and eGovernment for businesses at the national and EU levels.

Structure of the report

Chapter 1 introduces the study context and objectives. It also describes the conceptual model and study logic.

Chapter 2 concentrates on the key findings of the study. Availability and quality; portal use and usability; and the back office enablers are all vital elements of the Points of Single Contact. It outlines both mandatory compliance and other opportunities for further development of the Points of Single Contact.

Chapter 3 lays out a set of conclusions.

Finally, Chapter 4 identifies a number of possible policy recommendations that emerge from the conclusions.

This report has four parts: its context; key findings; conclusions; and a set of policy recommendations.

Study methods and scope

There were five stages to the study. **Desk research** provided the first step.

Stage two concerned the **development of three scenarios** to evaluate the Points of Single Contact (including benchmarking criteria and an evaluation grid). The scenarios covered three service sectors: construction services (architects); food and beverages (restaurants and catering); and tourism (travel agents and tour guides).

Stage three focused on the **testing of the Points of Single Contact** by both eGovernment experts and business panels. The eGovernment experts concentrated on the provision of information, availability of services, the degree of multilingualism of the portals, and electronic completion of procedures. The Points of Single Contact were tested by business user focus groups in 30 countries.

Stage four focused on **interviews**. They gathered information about back office enablers like the resources involved in, and costs of, developing the Point of Single Contact.

The objective of the stage five of the study was to **analyse the data and draw conclusions from the data gathered** in the previous four phases.

The study has four parts. It started in March 2011 and was completed in January 2012. The benchmark state-of-play assessment – that is, the testing of the Points of Single Contact – took place in the Member States between June and September 2011.

Key findings

- An overwhelming majority (80%) of the Points of Single Contact examined act as **gateways or signposts towards the websites of the relevant competent authorities**.
- In 27 out of the 33 Points of Single Contact tested, existing **government websites were used as the basis for initial development** of the Point of Single Contact.
- **Sound progress has been made** in simplification of procedures and authorisation schemes, and the dismantling of burdensome and unjustified requirements on domestic and foreign services provision. Yet the **Points of Single Contact have not yet led to a simplification in administration in terms of business establishment**.
- Overall **the shift from a "paper world" to an "electronic world" is incomplete**.
- **A considerable majority of the Points of Single Contact go beyond the mandatory requirements set out in the Services Directive** to provide information on topics like tax and social security.
- There are **significant differences** between Member States' Points of Single Contact with regard to **the availability and quality of electronic procedures**.
- **The top ten countries' Points of Single Contact** with the highest degrees of online sophistication in descending order are: Estonia, Liechtenstein, Luxembourg, Sweden, Italy, Slovakia, Denmark (both portals), United Kingdom, and Portugal. The **lack of support for cross-border acceptance of eIDs and eSignatures is an important barrier** for cross-border service delivery through the Points of Single Contact.
- There is **still a long way to go in order to move towards truly transactional eGovernment portals**.
- The **Points of Single Contact must be made more attractive and user-friendly** for businesses.
- Overall, nearly 60% of the focus group participants found the completion of procedures "easy" or "ok". However, **41% had difficulties in completing the procedures**.
- **Important linguistic barriers persist**.
- **Help tools are traditional; electronic and social networking tools are largely not yet available**. Static help tools are available on most of the Points of Single Contact. Yet other,

more interactive, communication tools like chat rooms are still only used in a few cases. There appears to be no use of social networks to interact with users.

- The **Points of Single Contact are not well known**: only 30% of focus group participants were aware of the existence of the Point of Single Contact in their own country.
- **The gap between the high performing Points of Single Contact and the low performing is considerable** and there are major differences across the portals with regard to the strengths and weaknesses of each portal.

Most Points of Single Contact do not yet comply with the Services Directive in legal and regulatory terms. The shift from a paper to an online world is incomplete. There is still a long way to go to move towards transactional eGovernment portals.

The availability and quality of eProcedures lags behind. In particular, the lack of support for cross-border acceptance of eIDs and eSignatures is a persistent barrier to cross-border service delivery.

Much more could be done to make the Points of Single Contact more well-known, and attractive and user-friendly for businesses.

Possible next steps

Two possible "to do" lists are put forward. The first list can help to create effective individual Points of Single Contact. The second list – intended for the appropriate policy-makers – highlights the need to develop a "Point of Single Contact Charter" that contains best practices and defines common minimum standards for each Point of Single Contact.

Recommendations for a “to do” list for effective Points of Single Contact:

- Focus on administrative simplification.
- Put in place solutions for cross-border completion of eProcedures
- Embrace new user-oriented models of service.
- Use a life event approach.
- Enable different pathways for different users.
- Provide different information for different users.
- Simplify access and use of the Points of Single Contact for entrepreneurs from other Member States.
- Introduce electronic tracking of applications.
- Develop user testing.
- Concentrate more on publicity and awareness-raising.

In terms of back office enablers:

- Integrate web linkages with professional associations and local authorities.
- Integrate the portals with those of chambers of commerce and other one-stop shops.
- Work to create greater standardisation and simplification of application and administrative forms.
- Put in place formal or legal arrangements to govern the relationship between the portals and the relevant competent authorities.

Recommendations for a “to do” list for policy-makers:

- Develop a "Point of Single Contact Charter".
- Create standards for information for foreign businesses.
- Do regular user testing of the portals.
- Do regular benchmarking of the portals.
- Concentrate on administrative simplification by fully using the potential of the provisions of the Services Directive (such as Article 5).
- Implement optimal policies and solutions for cross-border use of eSignatures, eIDs and eDocuments.

A comprehensive agreement on minimum standards on sophistication and usability for all the Points of Single Contact would stimulate progress and convergence towards a new generation of business-friendly portals.

Contents

- Executive Summary..... 1**
- 1 Introduction 9**
 - 1.1 Purpose of the document..... 9
 - 1.2 Structure and content of the document 9
 - 1.3 Context of the study 9
 - 1.4 Objectives of the study 11
 - 1.5 Methodology and approach..... 11
 - 1.6 Observations and reservations with regard to the methodology 14
- 2 Key findings of the study 16**
 - 2.1 Setting-up of the Points of Single Contact..... 16
 - 2.2 The scope of the Points of Single Contact..... 16
 - 2.3 Availability and quality of Point of Single Contact services 17
 - 2.3.1 Six business scenarios 18
 - 2.3.2 Availability and quality of information on the procedures required to complete the business scenarios 19
 - 2.3.2.1 Availability of information 19
 - 2.3.2.2 Information by administrative procedure..... 21
 - 2.3.2.3 Structure of information..... 22
 - 2.3.3 Availability and quality of electronic procedures..... 23
 - 2.3.5 Availability and quality of help services 38
 - 2.3.6 Overall availability and quality of Point of Single Contact services for users from abroad 40
 - 2.3.7 Composite availability and sophistication indicator of the Points of Single Contact 47
 - 2.4 Use and usability of Point of Single Contact services 49
 - 2.4.1 Task completion – ease of identifying the right procedures and completing them online..... 50
 - 2.4.2 Four measures of usability 53
 - 2.4.3 Portal accessibility 55
 - 2.4.4 A composite usability index 56

- 2.4.5 Take-up, positioning and promotion..... 57
- 2.5 Organisation and back office enablers 57
 - 2.5.1 Back office integration and cooperation with competent authorities 57
 - 2.5.2 Resources and finances..... 59
 - 2.5.3 Future plans - outlook 60
- 2.6 A Composite Overall Indicator..... 61
- 3 Conclusions 63**
- 4 Policy recommendations 67**
- References 70**

List of figures

Figure 1 – Conceptual Model..... 12

Figure 2 – Logic Approach of the Study 13

Figure 3 – Thematic areas covered by the Points of Single Contact 17

Figure 4 – Information availability on the Points of Single Contacts (average across countries) 20

Figure 5 – Information availability on Points of Single Contacts – (analysis per Member State) 21

Figure 6 – Information availability on Point of Single Contact portals (by type of administrative procedure)..... 22

Figure 7 – Structure/Organisation of information on the Point of Single Contact portals (average across countries) 23

Figure 8 – Online sophistication: the extent to which administrative procedures are available online..... 25

Figure 9 – Online sophistication: the extent to which administrative procedures are available online (excluding taxes and social services) 25

Figure 10 – Online sophistication: the extent to which administrative procedures are available online..... 26

Figure 11 – Online sophistication: the extent to which administrative procedures are available online (excluding tax and social security procedures) 27

Figure 12 – Online sophistication: the extent to which groupings of procedures are available online..... 28

Figure 13 – ePayment Facilities 35

Figure 14 – Available means for electronic tracking and delivery of administrative decision 38

Figure 15 – Help channels available at the portal 39

Figure 16 – Question: The portal provides a clear distinction for foreign businesses considering permanent (i.e. an establishment) and temporary trading (i.e. without an establishment in that country) 41

Figure 17 – Question: Even without knowing anything about the country's administrative and legal system, a foreign business could easily understand all requirements that had to be fulfilled to complete the scenario..... 42

Figure 18 – Clarity of administrative requirements for foreign businesses (establishment and temporary cross-border cases) 43

Figure 19 – Overall availability and sophistication benchmark 48

Figure 20 – availability and sophistication benchmark (excluding taxes and social services)48

Figure 21 – Overall Percentages of Ease of completing procedures through the Point of Single Contact 51

Figure 22 – Overall ease of completing procedures through the Point of Single Contact per type of administrative requirement 52

Figure 23 – Overall ease of completing procedures through the Point of Single Contact per Member State 52

Figure 24 – Portal efficiency and effectiveness according to SUS rankings 53

Figure 25 – User satisfaction using the AWARE ranking 54

Figure 26 – Propensity for portal re-use 55

Figure 27 – Point of Single Contact eAccessibility 56

Figure 28 – Composite Usability index 56

Figure 29 – Overall composite indicator – Ranking the Member States’ Portals 62

List of tables

Table 1 – Member States’ requirements for Official eIDs and qualified eSignatures (national users) 30

Table 2– Requirements for supporting documentation 33

Table 3 – Requirements for translation of supporting documentation 34

Table 4 – ePayment solutions supported 36

Table 5 – Tracking facilities 37

Table 6 – Points of Single Contact availability in different languages 40

Table 7 – Member States’ requirements for Official eIDs and Qualified eSignatures (foreign users) 45

Table 8 – Possibility of completing procedures electronically across borders (i.e. by users from abroad) 46

1 Introduction

This section explains the purpose and the structure of this report.

1.1 Purpose of the document

This final report brings together in a single document the overall **findings, conclusions and recommendations** of this study on the state-of-play and ways forward in relation to the Points of Single Contact under the Services Directive, and their functioning and usability.

The overall grouping of Member States' Points of Single Contact is described according to the study's conceptual framework which consists of three domains: availability and quality; use and usability; and back office enablers which are the different domains and services offered by the portals. Various good practices are highlighted for each aspect of Point of Single Contact services.

A set of possible policy recommendations or follow-up actions are laid out – they are called here "to do" lists. These concrete and practical means of enhancing the diverse aspects of the Points of Single Contact can apply to the national level of the different Member States' portals as well as at the level of the European Union (EU).

1.2 Structure and content of the document

This report is presented in four parts.

Chapter 1 is this introduction. It describes the context and objectives of the study, and its methodology and approach – outlining specifically its conceptual model and its study logic.

Chapter 2 concentrates on the key findings of the study. The findings cover the three domains of the study: availability and quality; use and usability; and back office enablers. They describe both how the Points of Single Contact comply with the mandatory elements of the Services Directive and with developments that can facilitate doing business in Europe. They examine the ways in which the different portals have been organised and the back office procedures that act as enablers for the portal organisation.

Chapter 3 outlines the resulting set of conclusions.

Chapter 4 identifies a number of possible policy recommendations that emerge from the study conclusions. These recommendations are classified into two separate "to do" lists. The first list can help to create effective Points of Single Contact at the national level. The second is a higher-level, generic list appropriate for policy-makers generally.

Finally, a brief set of references support the study. In annex are 38 tables which provide the raw data on such areas of interest as: the thematic areas covered by the Points of Single Contact; their history and architecture; information availability; number and types of formalities involved; online sophistication; use of eID, eSignatures and ePayment facilities.

1.3 Context of the study

This section provides an overview of the **context** of the study.

The Services Directive was adopted in 2006.¹ By the end of 2009, it obliged each Member State to set up a fully operational Point of Single Contact² to serve service providers.

¹ Directive on Services in the Internal Market, 2006/123/EC, 12-12-2006

Each Point of Single Contact should function as a "gateway" or as a "one-stop-shop for business". It should not only be influenced by the legal imperatives of the Services Directive, but also by requests strongly called for by business communities. Here, the legally mandatory conditions laid down by the Services Directive are described.

Articles 6-8 of the Directive specify the mandatory aspects with which Member States have been expected to comply in terms of the implementation of the Points of Contact and other related issues. Each of these articles is examined, first, briefly and then, second, in further detail.

Article 6 of the Services Directive emphasises the need to "ensure that each provider has a single point through which he can complete all procedures and formalities". However, as stated in the same article, ultimately, the number of Points of Single Contact available in each Member State can differ according to its regional or local competencies and "should not interfere with the allocation of functions among competent authorities within each national system". One of the Member State's administrative authorities, chambers of commerce or crafts, professional organisations, or private bodies can take on the function of the contact point. Article 8 of the Directive states that all formalities and procedures should be "easily completed, at a distance and by electronic means, through the relevant Point of Single Contact".

Article 6 of the Services Directive is dedicated to the Points of Single Contact. It stipulates the procedures and formalities that it should be possible to complete through a Point of Single Contact:

- All procedures and formalities related to the access to the activities of the service, particularly declarations, notifications, or applications necessary for the authorities, including the application for a register, roll or database, and with a professional body or association;
- Any applications for authorisation needed to exercise the service activities.

The subsequent two articles stipulate the right to information (Article 7) and access to procedures by electronic means (Article 8). Points of Single Contact should provide the following information in an easily accessible format:

- Requirements applicable to providers established in the territory, particularly the procedures and formalities to be completed in order to access and exercise service activities;
- Contact details of the competent authorities responsible for matters concerning the exercise of service activities;
- The means and conditions for accessing public registers and databases on providers and services;
- The means of redress available in the event of a dispute between the competent authorities and the provider/recipient or between a provider and a recipient or between providers;
- Contact details of associations or organisations from which providers or recipients may obtain practical assistance.

As indicated in the above list, besides the provision of information, Member States also need to ensure that businesses receive assistance from competent authorities in the form of information on the interpretation and application of the requirements: this may include step-by-step guidelines. Furthermore, the Points of Single Contact should respond as quickly as possible to any such requests and are encouraged to make the information available in other Community languages. The intention is to reach as many end-users as possible and to enable them to reap the full benefits implied by the use of these Points of Single Contact.

Perhaps the most important provision of the Services Directive in terms of administrative simplification is the already-mentioned obligation to make it possible to complete all procedures and formalities easily "at a distance and by electronic means, through the relevant point of single contact and with the relevant competent authorities" (Article 8 of the Services Directive). There are, however, three logical

² In this report we maintain the full description of a Point or Points of Single Contact. However, in many of the report's associated figures and tables, we use the abbreviation of PSC or PSCs.

exceptions to this obligation, namely for (i) the inspection of premises on which the service is provided, (ii) the inspection of the equipment used by the provider, and (iii) the physical examination of the capability or the personal integrity of the provider or his responsible staff.

The obligation to provide electronic services raises particular challenges in the cross-border context, as it implies that Member States should provide for solutions that allow service providers to also use their "national" eSignatures, eIdentification and eDocuments in other Member States should these be required for the completion of any given procedure.

In addition, various non-mandatory elements of portal provision may be equally, if not more, attractive to businesses. Businesses could – as a result – enhance trade, communication, and greater market competitiveness. This has been highlighted on numerous occasions by the business community including by e.g., Business Europe (2011a; 2011b) and Eurochambres (2011).

Three non-mandatory aspects related to the Directive and further opportunities for development of the Points of Single Contact can be highlighted. These are:

- exceptions or exemptions which, while they do not fall under the legal aspects of the Services Directive and are not directly covered by it, could facilitate the functioning of cross-border business. These aspects include taxation and social security payments;
- the use of a variety of Community languages (which is strongly encouraged by the Directive, but which is not mandatory);
- and the offering of "personal", personalised or individualised advice and guidance.

1.4 Objectives of the study

The **objectives** of the study are twofold. The first is to provide a preliminary assessment of the practical functioning of the Points of Single Contact, from the end-user perspective, of the impact they have on the provision of eGovernment services to businesses in the EU. The second is to offer guidance as to any possible further action needed to ensure a full reaping of the benefits of the Points of Single Contact in their role as eGovernment centres for businesses. Therefore, the study goes beyond the pure requirements of the Services Directive, as it takes into account – as outlined in section 1.3 – various non-obligatory but vital services.

The study undertakes a robust multi-faceted benchmarking exercise. It:

- provides a benchmarking analysis of Member States' Points of Single Contact;
- identifies various good practice solutions;
- highlights possible gaps and formulates policy recommendations for follow-up action to be taken at national and EU levels.

1.5 Methodology and approach

This section provides a brief **overview** of the methodology and approach used in the study.

This study began in March 2011 and was finalised in January 2012. The benchmark assessment took place in the different Member States between June and September 2011. Therefore, the assessment reflects the state of the Points of Single Contact at that period.

Two complementary figures outline the explanation of the study's method and approach. Figure 1 provides a graphical representation of the key components of the conceptual model that underpins the study and which enabled an assessment framework to be built for the Points of Single Contact. Figure 2 provides an overview of the logic of the whole approach to the study.

Overall, the study examined both national and cross-border service provision with regard to the Points of Single Contact (see the green, lateral, underpinning element to this conceptual model, illustrated in Figure 1).

The model consists of three separate "domains" (identified in Figure 1 in medium blue): availability and quality; use and usability; and back office enablers. Each domain has a number of components to it. The first domain comprises five components; the second also has five; and the third just three. Each of these components is coloured in dark blue. The details of each component are explained below.

The **availability and quality** domain covers the three main tasks of the Point of Single Contact: provision of information to businesses – its sophistication and its degree of navigation, completion of online procedures, and assistance to Point of Single Contact end-users. It also deals with the number of Community languages in which the portals are available. This assessment of findings has been carried out through tests by experts and business panels.

Use and usability are examined through three criteria, which are considered separately. Use and the ability to achieve goal-oriented requirements have been investigated using the AWARE method. Analysis of Web Application Requirements (AWARE) is a well-known goal-driven methodology that is able to assess performance against scenario-driven use requirements when using websites. Usability has been examined using the System Usability Scale (SUS) method. The SUS method is a questionnaire instrument that consists of a simple, ten-item list of attitudinal statements that are measured on a Likert scale. It provides a widely accepted method for identifying subjective assessments of usability. In addition, the ease of task completion through the Points of Single Contact from the end user perspective is analysed.

The third domain covers different **back office enablers**. These back office enablers are looked at in terms of the organisation and back office integration of the portals; their financing and resources; and their key technical enablers. Most of these factors have been investigated through consultation with Point of Single Contact developers and/or managers.

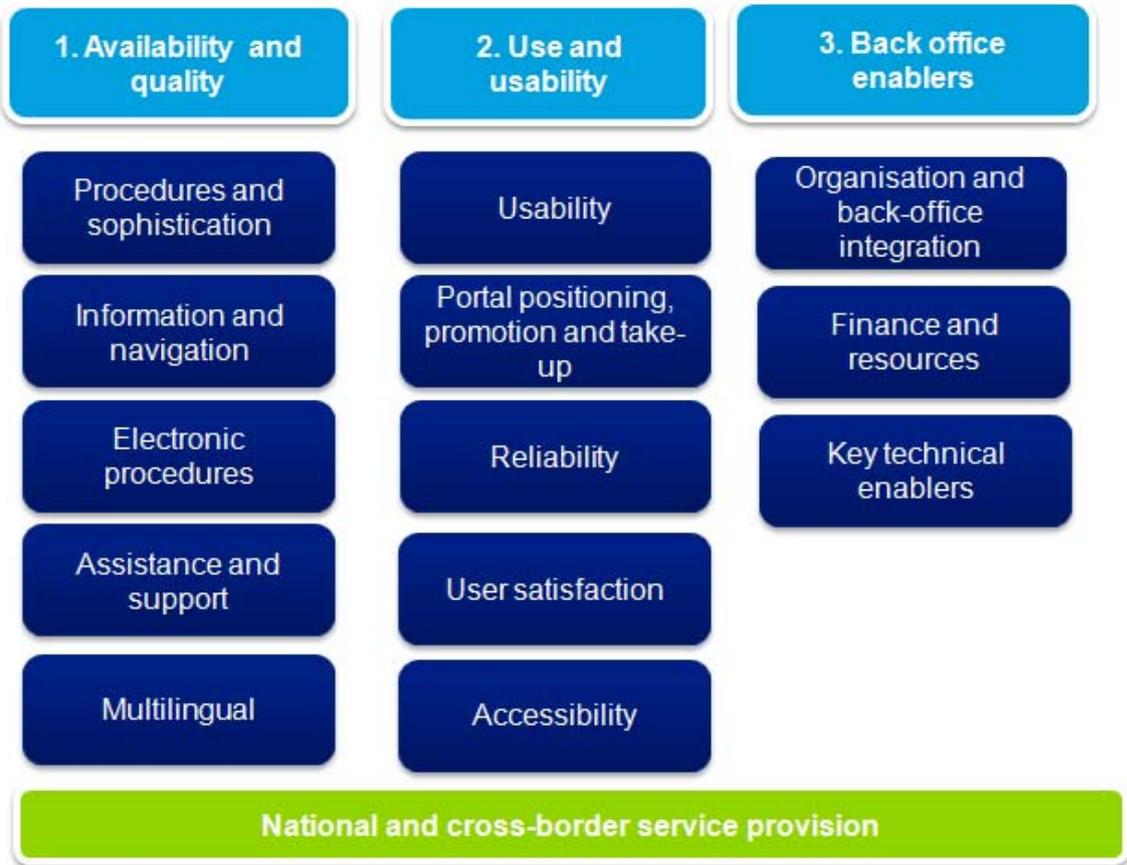


Figure 1 - Conceptual Model

Figure 2 provides an overview of the logic of the approach to the study. The various colours used in the figure (different elements of blue and green) are used simply to distinguish each stage from another. The precise details with regard to each stage of the study are explained following the presentation of the figure.

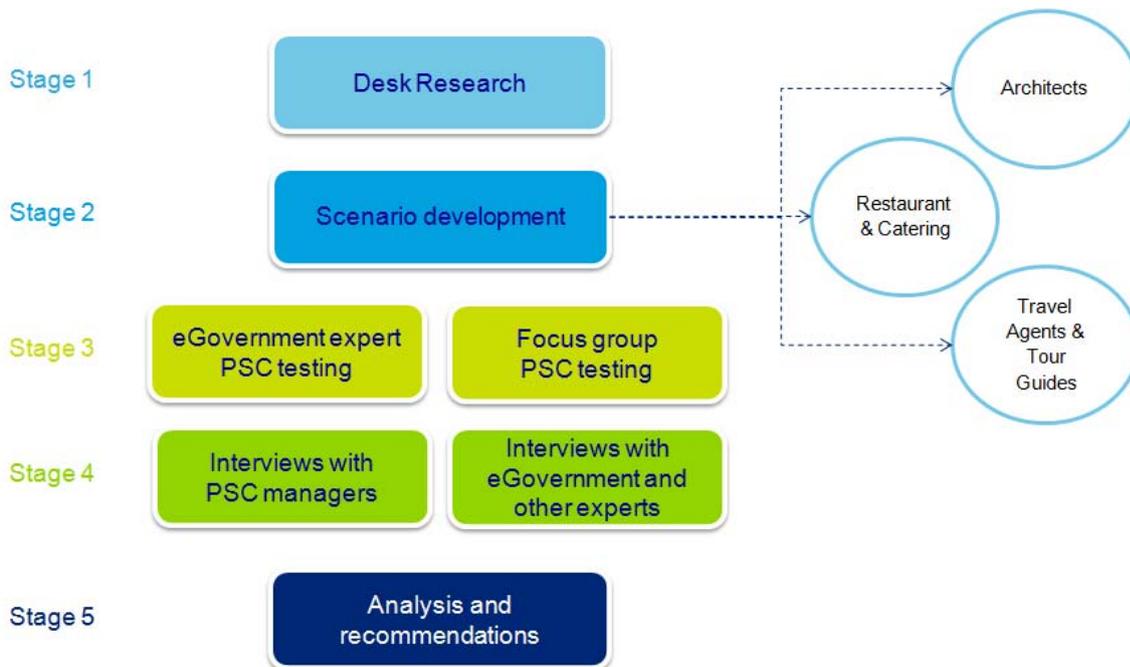


Figure 2 - Logic Approach of the Study

The **desk research** in the first stage of the study covered studies already undertaken on the implementation of the Services Directive and input provided by Member States to questionnaires conducted by the European Commission during the implementation of the Directive.

Stage two concerned the **development of scenarios** and the preparation of other methodological and managerial issues that were required prior to undertaking the evaluation of the Points of Single Contact. This stage included the benchmarking criteria and an evaluation grid to be used during the actual testing. The scenarios were developed in relation to three service sectors: construction services (architects); food and beverages (restaurants and catering); and tourism (travel agents and tour guides). These were selected not only because of their relevance in terms of cross-border mobility but also in order to cover a broad range of different applicable procedures. The scenarios took into account two business realities: the first is the case of a business that intends to establish itself, and the second is the case of a business already established in one Member State that intends to provide services in another Member State on a temporary basis and without actually establishing itself there.

Stage three consisted of two elements. It was perhaps the most complex of the five stages of the study. The focus was on the **testing of materials** by both eGovernment experts and business panels. First, pilot testing took place. After piloting testing, the materials were revised and were used "in the field". The Points of Single Contact were tested by independent eGovernment experts with an understanding of the Services Directive. They were also tested in business users' focus groups (or "panels"); these were composed of eight to 12 business participants who were representatives of the end-users in the three service sectors. While the eGovernment experts concentrated on in-depth testing of the websites, the end-users were engaged in usability testing and overall evaluation. Both groups used the benchmarking criteria and the evaluation grid developed for the study in order to undertake these evaluations.

The eGovernment experts concentrated their assessment on the following four criteria:

- Provision of information;
- Availability of services;
- Degree of multilingualism;
- Electronic completion of procedures in the same country and across borders.

The Points of Single Contact were tested by **business user focus groups**³. Focus group sessions were facilitated by "in-country" eGovernment experts.⁴ Focus group participants were given a predefined time to complete the test exercise: this was usually one hour. They were each provided with the predefined scenarios and asked to "think themselves into" the situation (or "scenario") described. Each participant was asked to carry out a series of tasks related to the two scenarios for the sector allotted to them (which was the sector of their own specialist or professional expertise). They carried out these tasks twice: once for their own country and once for another, predefined country. After the user testing phase, an interactive focus group discussion was facilitated that explored the results of the exercise and the participants' experiences of it.

Stage four focused on **interviews**. The interviews had two elements. First, interviews took place with the Point of Single Contact managers in each Member State. Second, there were interviews with four to six respondents who were representative of the staff responsible for the Points of Single Contact, eGovernment applications/services staff, and other relevant parties. The interviews gathered information about back office enablers like the resources involved in and costs of developing the Point of Single Contact.

The objective of the final phase of the study was **the analysis of the data and the drawing of conclusions from the data gathered** in the previous four phases. The three core areas of availability and quality, use and usability, and back office enablers have provided the focus of the analysis and the conclusions drawn. The key results are concentrated around these three areas, as well as the catalysts and barriers to the development of the Points of Single Contact. Conclusions with regard to further actions have also been formulated.

For each of the Points of Single Contact analysed, a detailed country report was drafted. These country reports are organised according to the structure of the conceptual model described here.

1.6 Observations and reservations with regard to the methodology

Since the Points of Single Contact are handled very differently in each Member State, a number of observations can be made with regard to how the investigation of particular portals were approached. These elements include their complexity, their status at the timing of the user testing in summer 2011, and their updating since that date. There are a number of limitations with regard to the business focus groups which are also explained here.

Complexity of the Points of Single Contact:

(i) Some Member States have multiple Points of Single Contact. These include the Member States whose structure involves autonomous states and regions such as Austria and Germany, and other countries such as Belgium and Spain. In the case of Austria and Germany, representative states were selected whose portals were examined.

(ii) Denmark has two sites, one for Danish businesses (which was built from the existing eGovernment website for business, and named VIRK) and one for foreign businesses (named BID). Given the different characteristics of the two portals, it was not possible to treat them as a single site. Therefore the two portals are referred to separately throughout the report, with their two names (DK-VIRK and DK-BID respectively).

Status of Points of Single Contact in summer 2011:

In a limited number of Member States, only a first phase of deployment of the Point of Single Contact was finalised by the time the evaluation of the portal took place (between June and September 2011). Hence, they could be tested only to a limited extent. Pilot sites were tested in two Member States and one European Economic Area (EEA) country. In Slovenia, the available business portal was tested; in Slovakia, the pilot version of the Point of Single Contact was tested; and in Iceland a pilot version of the Point of Single Contact – which has since gone live – was examined. The only country where a Point of Single Contact was not yet online, and no pilot was available at the time of the evaluation, was Romania.

Continual development of the Points of Single Contact:

³ Three portals could not be tested by the national focus group (Malta, Norway and Romania), while eight portals could not be tested by the cross-border focus group (i.e. Bulgaria, Hungary, Iceland, Italy, Liechtenstein, Romania, Slovakia and Slovenia).

⁴ These "in-country" experts were consultants from Deloitte's national public sector consultancy practices.

Generally, the development of the Points of Single Contact is in a constant state of flux: hence, the user testing and the ensuing results represent a snapshot in time. The conditions of certain of the Points of Contact may therefore well have already improved substantially between summer 2011 and the time of the completion of this report in January 2012.

Many Member States are developing and enhancing their Points of Single Contact continually: examples of substantial revisions are anticipated in countries that include e.g., Estonia, Finland, Malta, Norway and Poland. Romania is now launching the first version of its Point of Single Contact, on which a limited number of procedures are available.

2 Key findings of the study

This chapter presents the results of the Point of Single Contact assessment, and the key findings concerning the functioning and usability of the Points of Single Contact of the Member States.

It contains illustrations of good practices relating to the main tasks of the Points of Single Contact⁵ on information provision, completion of procedures and available help to users in order to complete the required tasks through the Points of Single Contact.

2.1 Setting-up of the Points of Single Contact

This section provides an overview of how the Points of Single Contact were set up in the different Member States (the 27 EU Member States and the three European Free Trade Association (EFTA) countries participating in the EEA, i.e., Iceland, Liechtenstein and Norway).

To comply with the obligations of the Services Directive, a number of Points of Single Contact were built on existing eGovernment business websites (which were government applications to business sites), whereas others were newly created. This study has revealed that, in the majority of the cases (27 out of the 33 Points of Single Contact analysed), existing government websites have been used as a basis to develop the Point of Single Contact. In seven Member States (Cyprus, the Czech Republic, Ireland, Lithuania, Portugal, Slovenia and Spain) entirely new websites have been built. In Germany, where the Points of Single Contact of three *Länder* (states) have been analysed, two are built on existing sites (those of Hessen and the Rhineland-Palatinate) while the third, the Point of Single Contact of Brandenburg was newly created.

The type of administrations responsible for the Points of Single Contact vary in the different Member States. They included the ministries of economy and commerce, tax authorities, administrative reform agencies, and chambers of commerce. Table 5 (in the Annex to this report) provides an overview of the responsible organisation and other co-responsible organisations for each Point of Single Contact studied. It indicates the vast range of types of ministries that are responsible for such fields, such as ministries of the economy, enterprise, trade, and administration or innovation and including ministries of the interior.

2.2 The scope of the Points of Single Contact

First, to be of added-value for end-users, the Point of Single Contact must offer businesses the possibility to complete the entire cycle of procedures and formalities relating to the access to and the exercise of their service activities without having to contact any institutional interlocutors other than the Point of Single Contact. This includes procedures of a sector-specific nature (such as registration with a professional body) but also those of a general/cross-cutting nature, such as company or trade registration.

Second, the Point of Single Contact should also include procedures that go beyond the scope of application of the Services Directive, in particular those relating to VAT, income tax and social security registration. Although there is no legal obligation for Member States to make these procedures available through their Point of Single Contact, they constitute indispensable steps for businesses that want to start an activity in another Member State. A Point of Single Contact that does not cover these processes may be compliant with the Services Directive, but it is of limited use to entrepreneurs. Third, it may also be of interest for an end-user to find supplementary information on the general business environment in a country through the Point of Single Contact, such as advice on grants, loans, funding

⁵ The term Point of Single Contact (or Points of Single Contact) is used throughout the text of this report. However, in many of the illustrations, the abbreviations of PSC and/or PSCs are used.

or intellectual property rights. Again, there is no obligation to provide this information, but businesses are likely to consider it to be useful.

As a first step, this study looked at the general scope of information associated with the start-up (access to and exercise of a service activity) provided on the Points of Single Contact.

Here, the report considers only the general availability of information, not the degree of interactivity or the ability to carry out procedures online. This aspect of the study is analysed in detail in the following sub-section.

The evaluation shows that advice on legal structures, company registrations, permits and insurance issues are very well covered: there is overall a 94% coverage. Information on the qualifications needed to start a business can be found on 64% of the Points of Single Contact analysed, while information on procedures relating to the place where the service is carried out is provided on 55% of the Points of Single Contact. In descending order, information on taxes is covered by 85% of the Points of Single Contact, employment-related information by 76%, social security issues by 64%, issues related to international trade by 52%, and how to grow the business once it is established by 36% of the portals. Interestingly, many Points of Single Contact also provide advice on grants, loans, funding, and intellectual property rights issues (a 67% coverage). The three most complete Points of Single Contact, that cover all the nine thematic areas investigated by the study, are those located in Estonia, Luxembourg and the United Kingdom. Points of Single Contact that could be improved in this regard are those in the following eight Member States: Austria, Denmark, Ireland, Italy, Malta, Poland, Spain and Slovenia.

Figure 3 provides an overview of the overall coverage of thematic areas on the Points of Single Contact analysed.

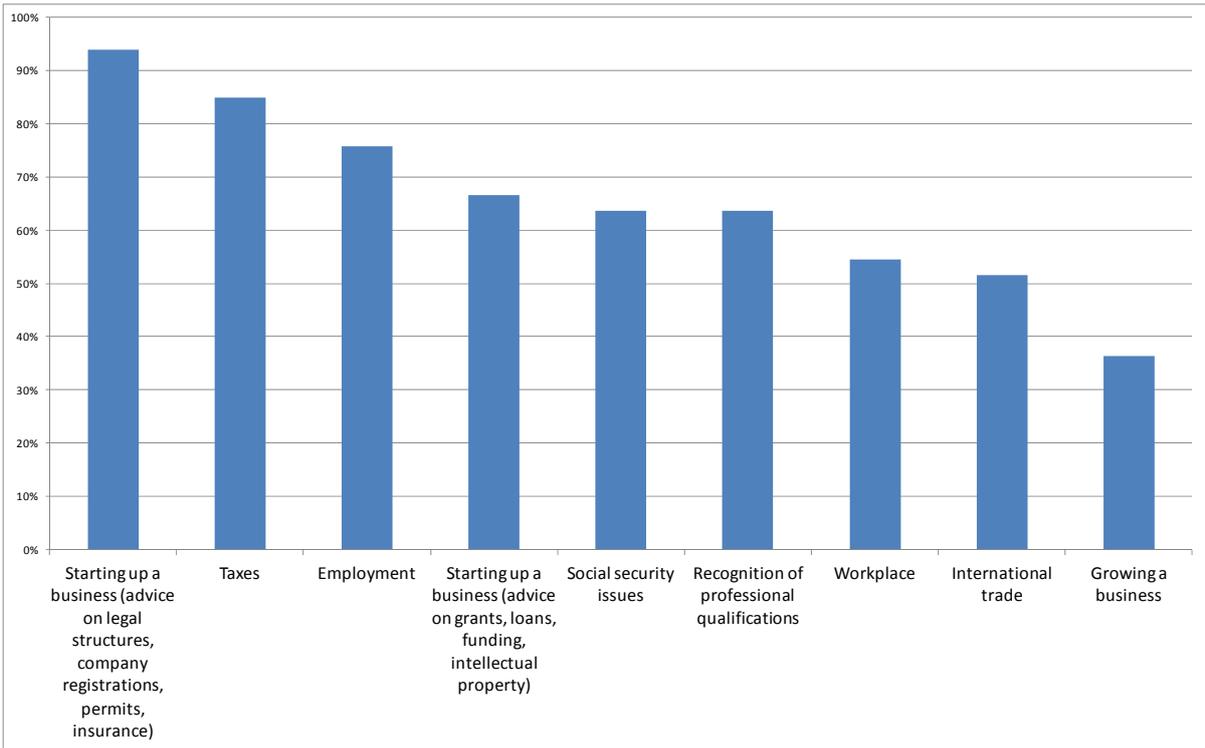


Figure 3 - Thematic areas covered by the Points of Single Contact

2.3 Availability and quality of Point of Single Contact services

This sub-section of the report outlines a set of issues that relate to the quality and availability of services available on the Point of Single Contact. It first covers a number of the methodological issues related to the examination of these questions, in particular, how the six business scenarios were investigated and the development of the Electronic Procedures Sophistication Model. It describes the availability and numbers of procedures required to complete the tested scenarios. It explores the differences between two main types of scenarios covered by the Services Directive: cases of

permanent establishment (when a business wants to open a new establishment) and cases of temporary provision of services across borders (when a business is already established in one country and wants to offer its services temporarily in another Member State without setting up an establishment there).

The assessment of the quality of the different services available on the Points of Single Contact includes an analysis of the availability and quality of information provided through the Points of Single Contact, the degree to which procedures can be completed electronically (including an assessment of the readiness of key technical enablers⁶) and a brief assessment of the assistance services the Points of Single Contact offer its users. A separate sub-section looks specifically at the availability and quality of Point of Single Contact services for users from abroad.

Finally, these findings are brought together in a Composite Availability and Sophistication Index.

2.3.1 Six business scenarios

The degree of availability of services through the Points of Single Contact was analysed on the basis of six business scenarios.

The six scenarios focused on concrete examples in three sample service sectors – construction services (architects); food and beverages (restaurants and catering); and tourism (travel agents and tour guides). These were selected not only because of their relevance for cross-border mobility, but also in order to cover a broad range of different applicable procedures.

The scenarios took into account two business realities: first, the case of a business that intends to establish itself – these are called the "establishment" scenarios; and, second, the case of a business already established in one Member State that intends to provide services in another Member State on a temporary basis and without actually establishing itself there – these are called the "temporary cross-border" scenarios. These two terms – establishment and temporary cross-border – are used throughout the tables and text in this report.

For each scenario, eight groupings of administrative formalities (e.g., authorisation schemes, licences, and other procedures) that businesses are most typically obliged to fulfil in order to provide their service activities were examined. The study also took into account a number of procedures that go beyond the scope of application of the Services Directive, in particular those relating to VAT, income tax, and social security registration. Even though there is no legal obligation for Member States to make these procedures available through their Point of Single Contact, they constitute indispensable steps for businesses that wish to start an activity in another Member State.

For each grouping of procedures, the study analysed the degree to which information was available through the Point of Single Contact and to what extent a business was able to complete the relevant procedures electronically.

The eight groupings of procedures (which are called "types of administrative requirements") were:

1. Company registration;
2. Obtaining a general business licence;
3. Procedures relating specifically to the service provider/ profession that is being exercised (such as recognition of professional qualifications, licences to act as a travel agent, architect, or sell alcohol);
4. Tax and financial formalities;
5. Social security formalities;
6. Regulations relating to the premises of the provider, such as providing proof of the location and/or ownership of the premises;
7. Procedures relating to the way the service is carried out and the place where the service is carried out, such as applying for authorisation to make outdoor sales or serve food on a street (called "operations and location" in later tables);
8. Procedures applying only or specifically to cross-border provision of services.

These eight types of administrative requirements covered the most common procedures with which businesses usually need to comply when starting their activities. In order to complete these requirements, service providers are often required to provide specific supporting documentation (e.g., proof of insurance coverage and proof of good repute).

⁶ Examples include eSignatures, eIdentity and eDocuments; ePayment; and electronic tracking services.

The different supporting documents were referred to as "procedural components that may be relevant to the preceding procedures". They included the need to:

- Provide a translation of legal documents produced in another country;
- Provide details of the location of the business;
- Provide proof of the ownership of the business;
- Demonstrate proficiency in the local language;
- Demonstrate good repute or the lack of a criminal record;
- Prove accreditation from a financial organisation guaranteeing funds if the business should fail;
- Provide official proof of experience or qualifications;
- Provide official proof of identity;
- Provide proof of non-bankruptcy;
- Provide proof of sufficient financial resources/solvency;
- Provide evidence of relevant insurance;
- Provide proof of no outstanding tax payments.

2.3.1.1 Number of procedures required to complete the business scenarios

The number of procedures required to accomplish the scenarios was listed for each of the six scenarios in each of the Member States. The number of procedures required varies among the Member States. For the three establishment scenarios, the average number of procedures required is 48. Member States with fewer than 30 required procedures include Luxembourg (15), the Netherlands (25) and Portugal (22). Member States that require more than 60 procedures to be completed include Austria, Germany (i.e., all the three analysed Points of Single Contact in that Member State), Iceland, Liechtenstein, Sweden and Slovenia.

The number of required procedures for the "temporary cross-border scenarios" is lower, as was to be expected: on average, only 25 procedures are required and the spread in numbers of procedures to be completed in the different Member States is less significant than for the "establishment" scenarios.

Although the evaluation of the simplification of the existing procedures required by the Service Directive was not the scope of this study, these findings seem to indicate clearly that different levels of regulatory and administrative burden exist in European countries.

Although sound progress is reported in the two areas of the simplification of procedures and authorisation schemes, and the dismantling of burdensome and unjustified requirements on domestic and foreign services providers, the setting-up of the Points of Single Contact has, in many cases, not yet led to administrative simplification in terms of business establishment.

2.3.2 Availability and quality of information on the procedures required to complete the business scenarios

2.3.2.1 Availability of information

The testing of the Points of Single Contact analysed the extent to which information needed to understand how to fulfil the procedures can be located on the Point of Single Contact itself or on linked governmental websites.

Overall, the information is available for 81% of the procedures needed to complete the six scenarios. In other words, four-fifths of the Points of Single Contact analysed reach at least Stage 1 of the eGovernment sophistication model used.

Figure 4 provides an overview of the availability of information on the required procedures on the Points of Single Contact.

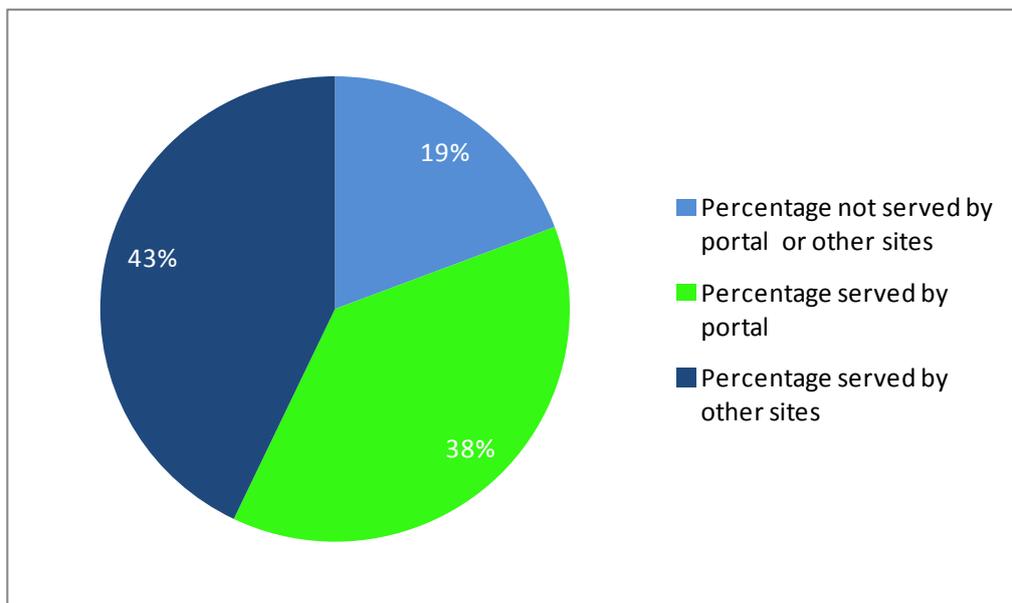


Figure 4 – Information availability on the Points of Single Contacts (average across countries)

This analysis shows that, overall on a European level, for 19% of the procedures analysed the information is still missing and is available on neither the portal site nor on other associated sites.

Often the Points of Single Contact redirect users to other eGovernment websites. This situation is not problematic as long as the transition is organised smoothly and there is a structural coherence between the Point of Single Contact and the linked eGovernment sites.

Users are, of course, interested in easy access to complete and trustworthy information. Trust is enhanced by an assurance that the user is not leaving the official online government environment. Other, usability-related aspects of the portals are analysed in later sections of this report, notably section 2.4.

There were some Point of Single Contact portals with little information provision. For instance, some focus group attendants in Austria affirmed: *"There is no specific information provided on the Point of Single Contact portal – you only get redirected to other pages where you have to collect your information in pieces and this is very, very time-consuming and complicated"*.

Figure 5 provides a detailed overview of the information availability on procedures on each Point of Single Contact analysed in the different Member States. Excellent performers are Finland, Latvia, Portugal, Norway, Spain, the Netherlands, and the United Kingdom where information about all the procedures tested is covered by the Point of Single Contact or linked eGovernment websites. There is a strong middle ground of Member States with good coverage in terms of information provision. Examples of such countries' Points of Single Contact include Cyprus, the Czech Republic, Denmark, France, Hungary, Norway, and Portugal.

A positive special case is the Estonian Point of Single Contact that includes a 100% coverage of the information on all the procedures, although these are completely covered by other eGovernment sites. Estonia is a mature eGovernment country. Its Point of Single Contact is built on existing, well-advanced eGovernment structures. It is an excellent portal site that redirects users seamlessly to the relevant information.

When this analysis is combined with data on the scope of the Points of Single Contact, it seems as though those Member States with decentralised, federated Point of Single Contact systems, such as Austria and Germany, perform at a low level on both of these two indicators.

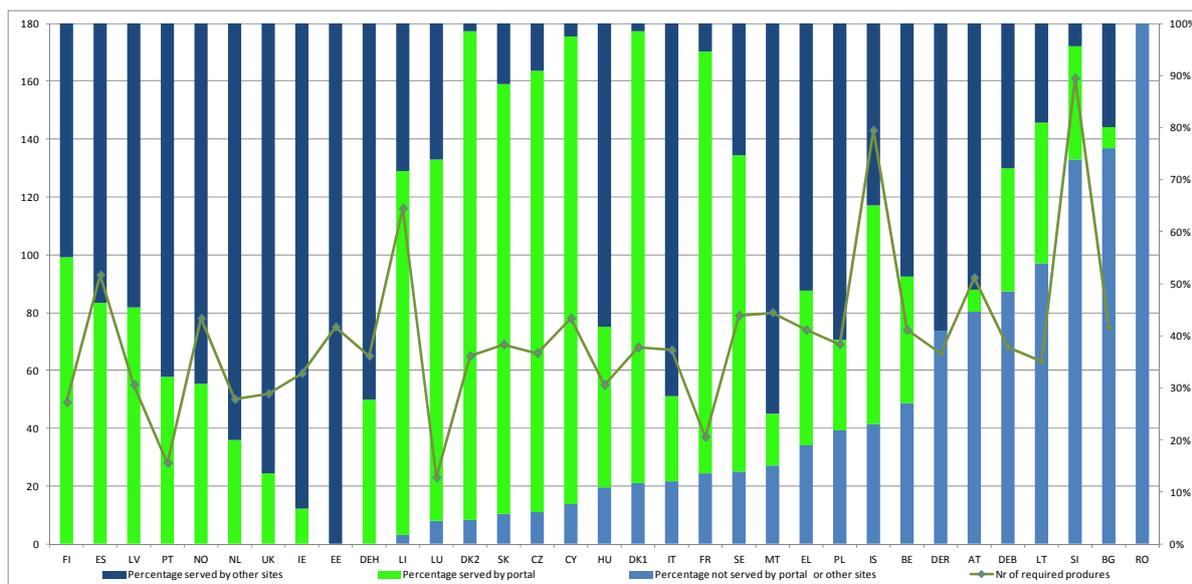


Figure 5 – Information availability on Points of Single Contacts – (analysis per Member State)

NOTE 1: All names used in this chart (and the relevant charts that follow) are the abbreviations for the various European languages used on the EU-GO portal http://ec.europa.eu/internal_market/eu-go/ with five exceptions. These are the three websites investigated in German *Länder*: Brandenburg (DEB), Hessen (DEH), Rhineland-Palatinate (DER), Denmark – BusinessinDenmark (DK-BID) and, in and when appropriate, the Danish – VIRK (DK-VIRK).

NOTE 2: Data are aggregated by country and a distinction is made between procedures that are missing (i.e. are not covered at all, in light blue), procedures served (at any level of sophistication) at the Point of Single Contact (in dark blue) and procedures served (at any level of sophistication) by other websites (in green). The line refers to the number of required procedures in each Member State.

2.3.2.2 Information by administrative procedure

When breaking down data on information availability by type of administrative procedure, it emerges that company registration and tax formalities are those best covered (information on those types of administrative procedures is provided by 94% and 76% of portals respectively, as shown by Figure 6). The availability of sector-specific information with regard to person-related procedures (including recognition of professional qualifications) is remarkable as well: 67% of portals provide it. Information provision is lower for the remaining type of administrative procedures that were included in the study: social security formalities (55%), premises of the provider (58%), operations and location (56%), and cross-border procedures (50%). Information about general business licences is provided by 12 portals, while it is missing in five cases (i.e. a licence is required but no information is provided on how to obtain it). There is a large number of cases of Points of Single Contact on which information is not provided because a general business licence is not required by the legislative framework in place in the particular country⁷.

⁷ The data on general business licences refers to only 17 countries as a general business licence is not required by the legislative framework for the remaining number. Sixteen countries do not require a general business licence: Bulgaria, Cyprus, Denmark, Estonia, Germany - the *Land* of Hessen, Greece, Iceland, Ireland, Latvia, Malta, the Netherlands, Poland, Portugal, Spain, Sweden and the United Kingdom.

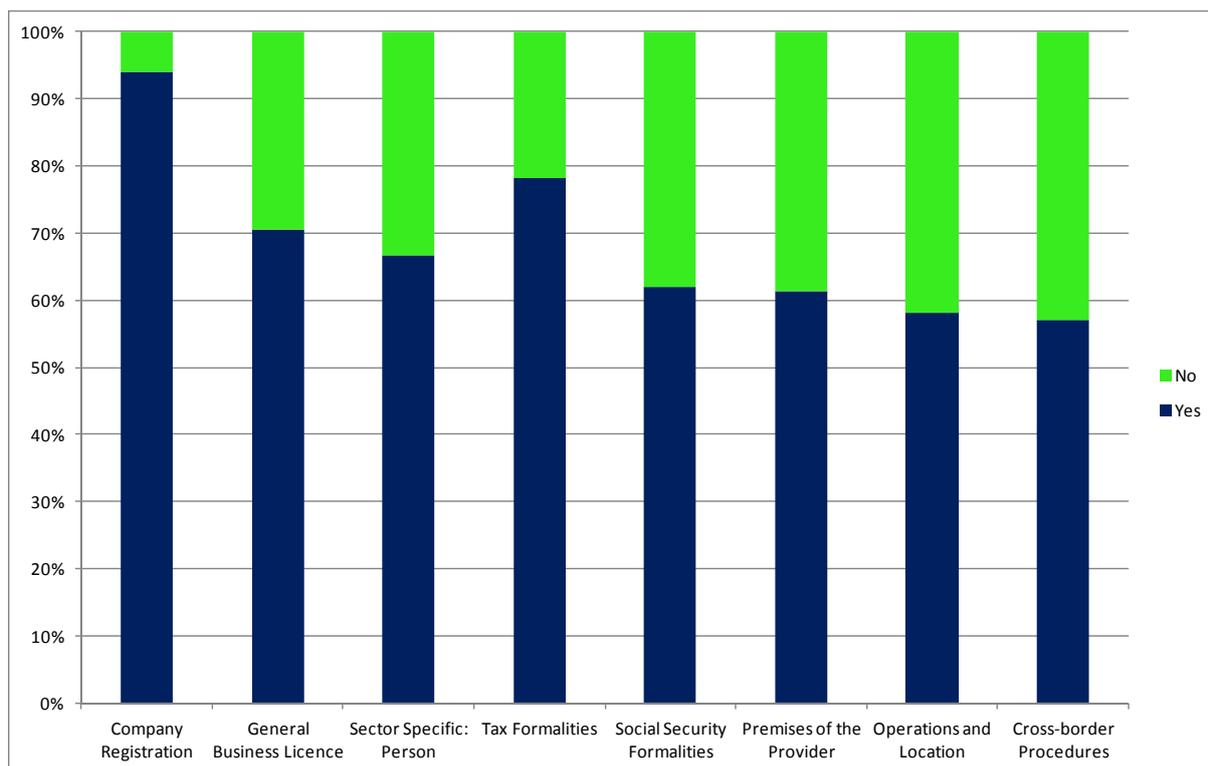


Figure 6 - Information availability on Point of Single Contact portals (by type of administrative procedure)

2.3.2.3 Structure of information

As the final step in the analysis of information availability, the structure of information (i.e. how information is organised on the Points of Single Contact, and how it can be searched) was considered.

As shown by Figure 7, in 76% of cases, it is possible to access information through a thematic index of procedures. In 67% of cases, one can access information sorted by service sector. On 55% of the portals, it is also feasible to search for information by type of user, whereas a lower percentage (45%) of the portals have an alphabetic index of procedures. Fewer than half (39%) of the portals allow access to information based on the stage of the business in the business life-cycle. Of all the portals included in the study, only 12% have a complaint management facility (namely, the portals of Greece, Luxembourg, Norway, and Sweden).

As with many other characteristics, a great diversity is found among the portals included in the study with regard to the actual structure of the information to be found on the portal. Only a small proportion of the portals support all of the search facilities: the Norwegian and the Swedish sites are the only portals that possess all the search features included in the analysis; four other portals (Belgium, Cyprus, Hungary, and Luxembourg) have five out of six of them. At the other end of the spectrum, six portals only have two out of the six features examined (these are Points of Single Contact in Austria, German Länder such as DEB and DEH, Greece, Ireland, and Italy). The French Point of Single Contact has only one search facility (this is information search by service sector).

These ranges of availability in terms of the availability and quality of information available on procedures required to do business make it therefore seem as though it may be quite difficult to find common ground among the Member States in this regard.

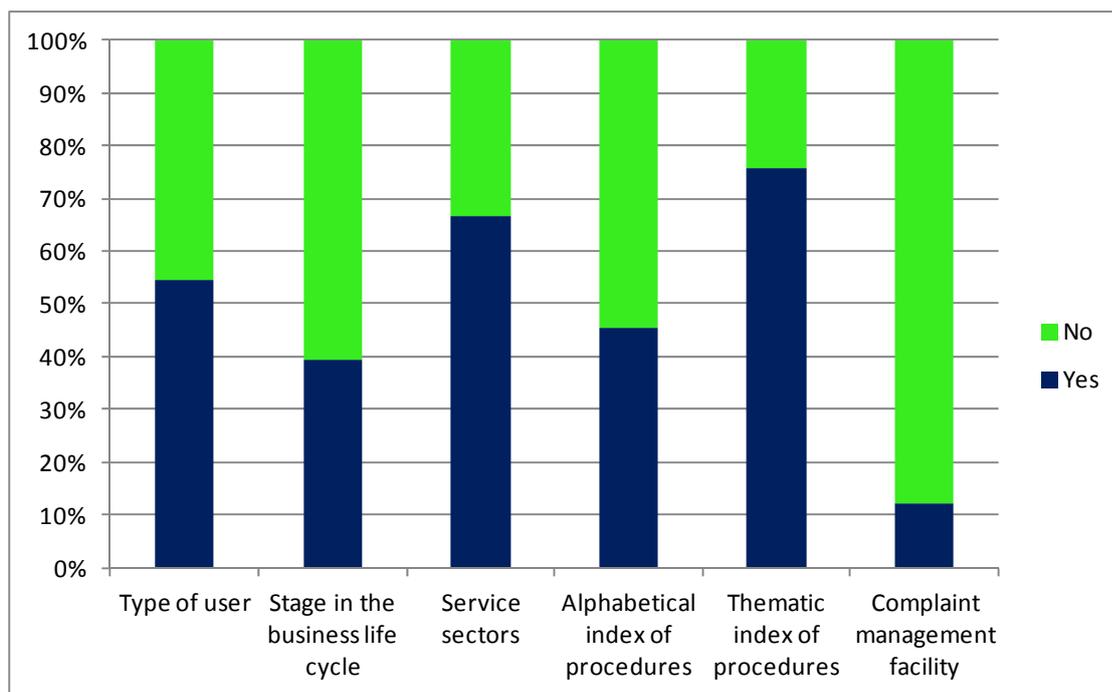


Figure 7 - Structure/Organisation of information on the Point of Single Contact portals (average across countries)

2.3.3 Availability and quality of electronic procedures

The Points of Single Contact need to provide not only information on procedures, they also need to make electronic completion of procedures available. Therefore, the level of online sophistication was analysed based on the four-stage Electronic Procedures Sophistication Model (for the procedures needed to complete the six scenarios).

2.3.3.1 Electronic procedures sophistication model

Businesses need relevant, useful and usable information. They must be able to find the relevant information to complete the entire cycle of all procedures and formalities relating to the access to and the exercise of their activities on the Points of Single Contact. They should also be able to fulfil all the procedures needed online. Hence, all the relevant information, downloading all relevant application forms, uploading forms and support documents, and receiving administrative decisions by electronic means should be available to them. In other words – to use eGovernment terminology – the Points of Single Contact should be fully transactional Government-to-Business portals.

These portals should be transactional both for businesses within a given Member State and by those from abroad.

From a user perspective the fact that the portal is transactional is very important; participants in the focus group said, for example, with regard to two portals: "*[the] best thing about the De Guichet portal ... [is that] this is really a great tool that will ease business access in Luxembourg and facilitate our life. We hope this tool will be deployed to other procedures. This is exactly what we need.*" And, with regard to the Slovakian portal, participants commented: "*the best thing about all this is the possibility to set up a business from home. No travelling, no waiting, no originals.*"

The sophistication of the Points of Single Contact portals was examined in this study, in terms of the online completion of procedures, by using a commonly adopted eGovernment maturity model that has a four-step scale⁸. The four steps or stages of development are referred to as information; one-way

⁸ The model adopted for the study is the benchmark model developed by CapGemini for the annual benchmark of a sample of 20 eGovernment services in EU Member States (European Commission Directorate General for Information Society and Media (2009), *Smarter, Faster, Better eGovernment. 8th Benchmarking Measurement*, prepared by CapGemini, Rand Europe, IDC Sogeti and DTI. The fifth level (targetisation) was added only lately to the benchmarking exercise. It was decided not to

interaction, two-way interaction and – at the highest degree of maturity – full case-handling. They are described in more detail below:

1. **Information:** only the information required to understand how to complete the procedure is available;
2. **One-way interaction:** forms concerning the procedure that can be downloaded and printed are available (these can then be returned by post, email or taken directly to relevant competent authority offices);
3. **Two-way interaction:** forms concerning the procedure can be downloaded and uploaded, which enables the entrepreneur to start the procedure electronically. However, procedures are not fully online, some tasks need to be completed via alternative means (e.g., by post or visit to an office);
4. **Full case-handling:** the whole procedure can be completed online (including the receipt of the administrative decision).

For the purpose of this study, stages 2 to 4 are treated as a single group which is referred to as “transactional procedures”.

To analyse the current maturity of the Point of Single Contact, six real-life business scenarios were used that focused on concrete business examples from three business sectors – architecture, restaurants/catering and tourism (agency and guides).

The six scenarios were divided into two different sets.

First, a distinction was made between missing procedures and the rest of procedures. As already illustrated in Section 2.3.2, there was a range of procedures for which information was not even provided, either on the portals of the Points of Single Contact or at linked websites. Overall, 19% of procedures are missing.

As a second step, the proportion of procedures for which only information is provided was identified (i.e., stage 1 of the model). Evidence shows that overall 26% of procedures are at stage 1. In fact, only 45% of procedures are not served at all or served with quite a low level of sophistication. This finding is most striking, especially considering that, according to the latest benchmarking exercises, stages 3 and 4 have become a standard for many countries, and that full online case-handling (stage 4) “*is increasingly becoming mainstream*”⁹.

Finally, the remaining procedures were examined. Overall, 55% of procedures are served with some level of transactionality, as defined for the purposes of this study (i.e. levels 2, 3 and 4 of the model).

Overall, the information is missing for 19% of the procedures. For another 26% of the procedures only a very low level of information is provided.

Figure 8 provides a detailed analysis of these figures for each Point of Single Contact. Important differences can be observed. Positively, in the cases of Estonia, Finland and Norway, the procedures examined in the scenarios are all covered on the Point of Single Contact. This applies not only to information availability but also to electronic completion where – as a minimum – “one way interaction” is possible.

include targetisation in the present study because of its recent formulation. According to CapGemini’s methodology, it is not applicable to several of the types of administrative procedures analysed, including company registration.

⁹ European Commission Directorate General for Information Society and Media (2009), *Smarter, Faster, Better eGovernment. 8th Benchmarking Measurement*, prepared by CapGemini, Rand Europe, IDC Sogeti and DTI, p21.

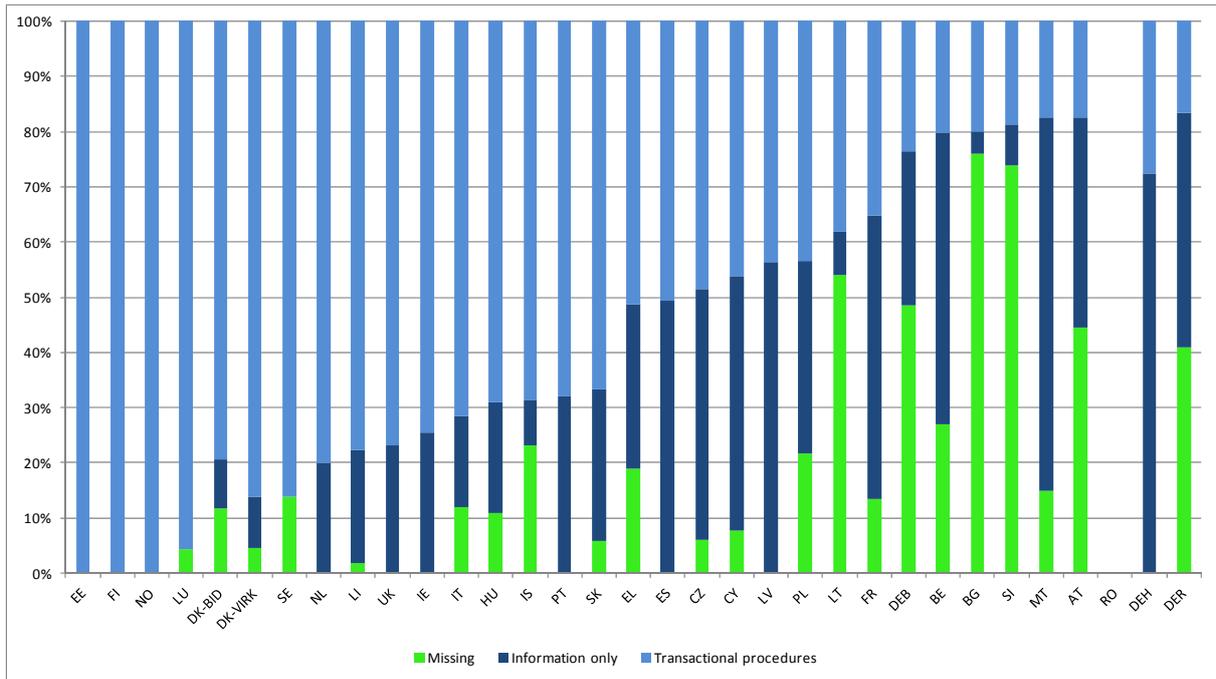


Figure 8 - Online sophistication: the extent to which administrative procedures are available online

The group of countries that are most advanced on this point, with a level of transactionality higher than 70%, includes Denmark, Estonia, Finland, Ireland, Italy, Liechtenstein, Luxembourg, the Netherlands, Norway, Sweden, and the United Kingdom. In the first three of these countries (Estonia, Finland, and Norway), there is full transactionality as defined for the purposes of this study (i.e. stages from 2 to 4 of the model).

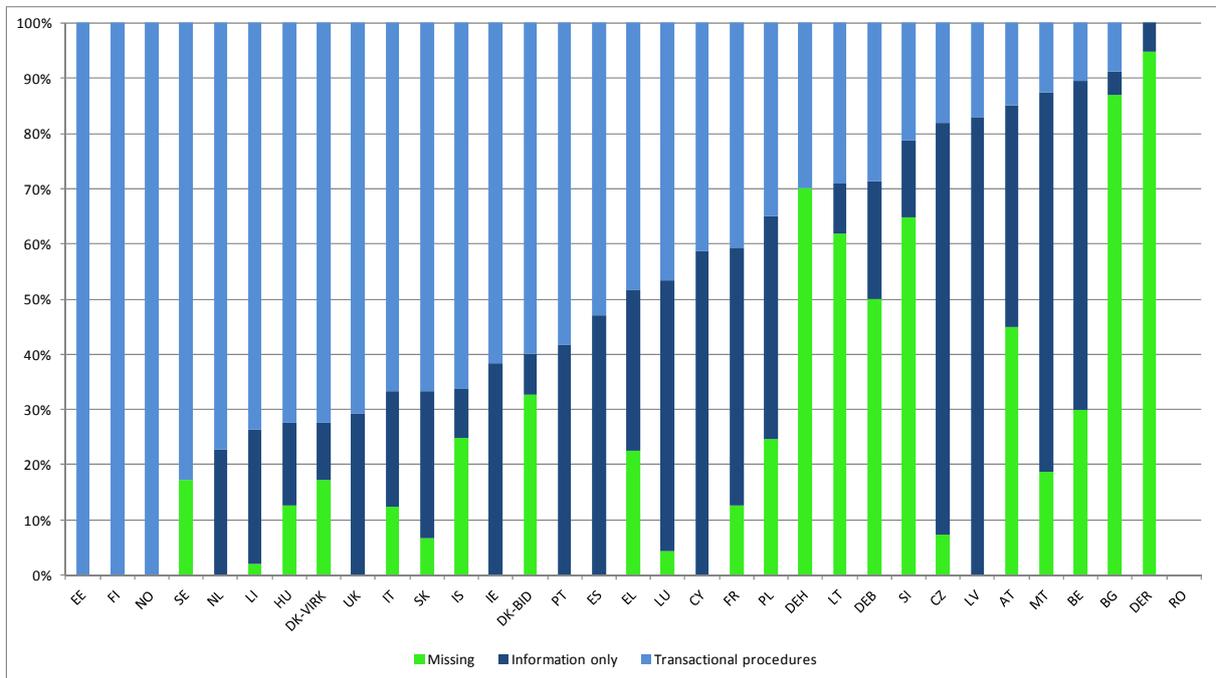


Figure 9 - Online sophistication: the extent to which administrative procedures are available online (excluding taxes and social services)

Once taxes and social security (which are not mandatory procedures according to the Services Directive) are excluded from this analysis, the top ten countries in terms of online sophistication changes somewhat. Whereas the top three countries remain identical (i.e. they retain full transactionality as defined in this study) the order of the remaining seven countries changes. New

countries appeared on the list. The top countries, once taxes and social services are excluded, are: Denmark, Hungary, Italy, Lithuania, the Netherlands, Sweden, and the United Kingdom.

When refining the analysis of the group of transactional procedures, the study shows that the 55% of transactional procedures can be classified in the following way: 22% are a one-way interaction (meaning that forms can be downloaded), 9% are two-way interaction (which implies that forms can also be uploaded), and 24% are full case-handling (so that the procedure can absolutely be completed online). In other words, for only 24% of the procedures is full electronic completion of the procedure available.

Figure 9 provides a detailed analysis of these figures for each Point of Single Contact. Five websites have a high level of transactional procedures: they are Estonia, Italy, Liechtenstein, Sweden and the pilot version of the Point of Single Contact which was tested in the case of Slovakia.

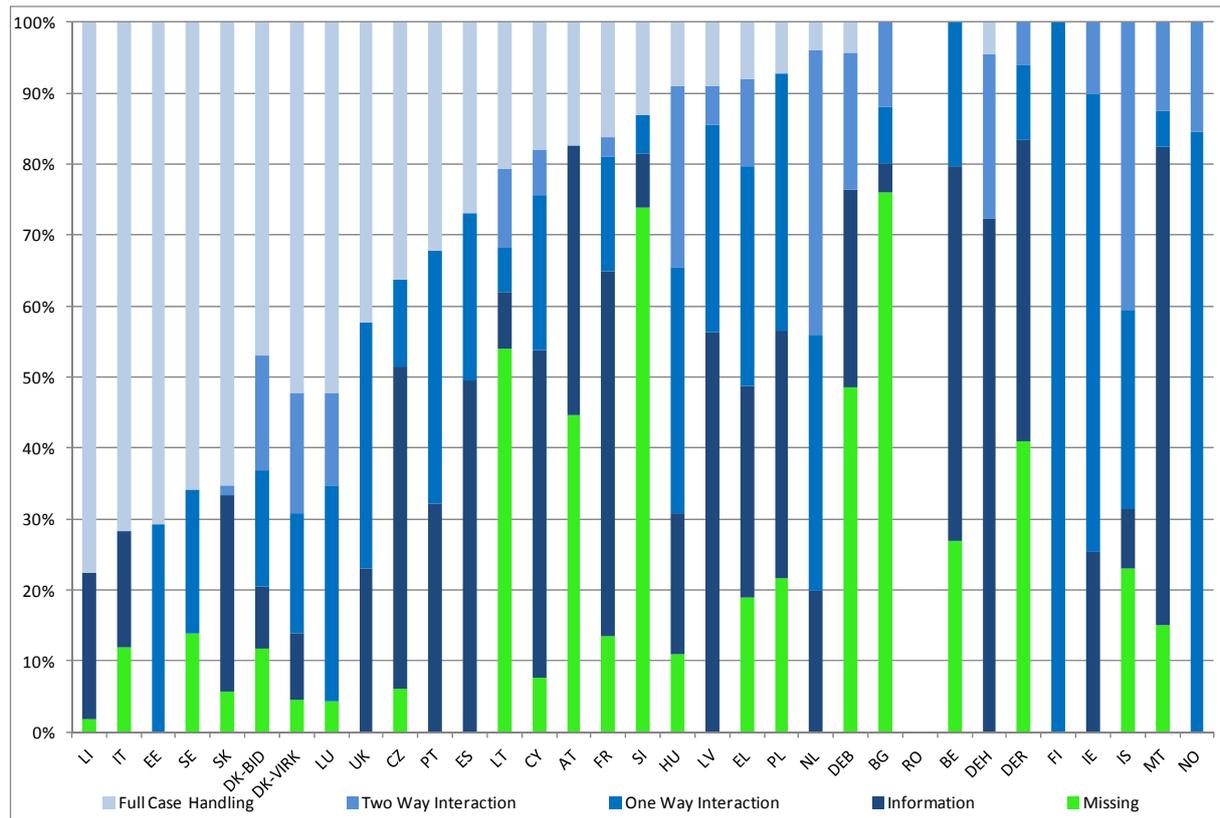


Figure 10 - Online sophistication: the extent to which administrative procedures are available online

Eight portals that cover seven countries have more than 50% of their procedures covered by full case-handling. Once again, once the non-mandatory procedural elements of tax and social services are removed from the calculation, the top five countries' Points of Single Contact for online sophistication alters. It becomes, in this order, Liechtenstein, Slovakia, Estonia, Italy, and Sweden.

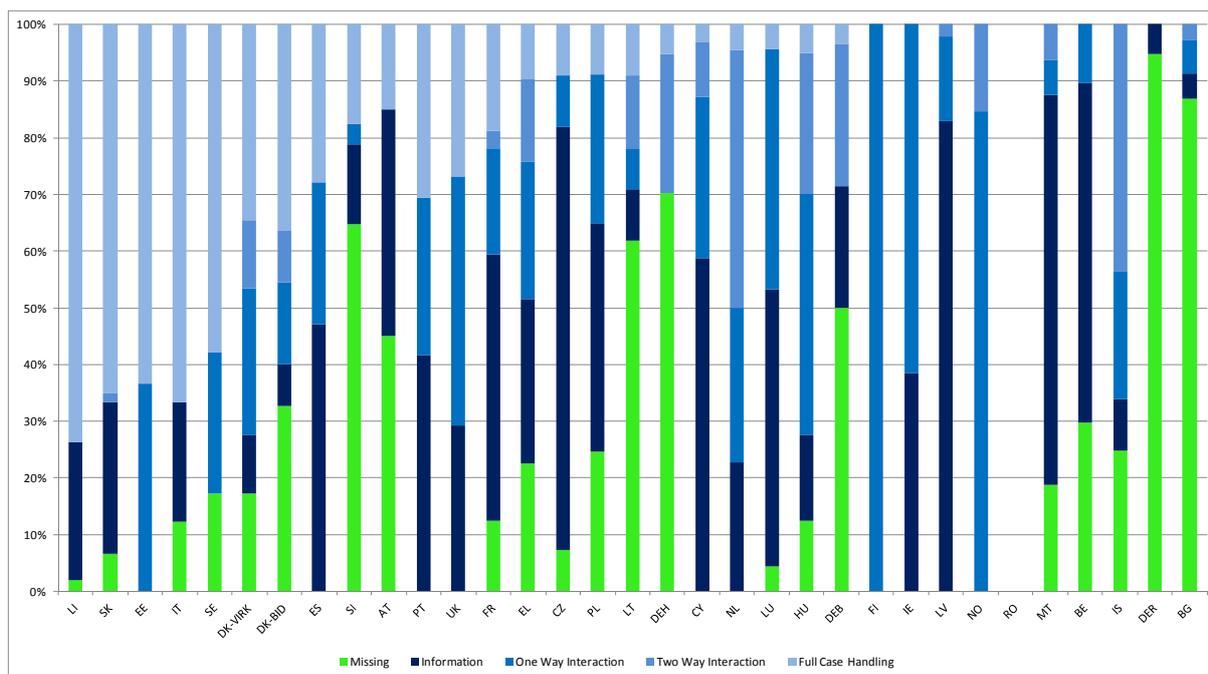


Figure 11 – Online sophistication: the extent to which administrative procedures are available online (excluding tax and social security procedures)

2.3.3.2 Availability and quality of electronic procedures by grouping of procedures and by services sector

In this section, the online sophistication of the procedures is analysed in relation to the eight groupings of administrative formalities used to assess the scenarios.

Figure 11 demonstrates that, overall, the company registration procedures are well covered and reach a good level of transactionality. (That is, all three stages, Stage 2, Stage 3, and Stage 4 of the Model can be performed in the overwhelming majority of cases.)

Less well covered by the Points of Single Contact are requirements relating to the premises of the provider, such as providing proof of the location and/or ownership of the premises and procedures relating to the way in which the service is carried out and the place where the service is carried out. Similarly less well covered is the procedure of applying for authorisation to make outdoor sales or serve food on a street (which is called "operations and location"). This effect may be seen because, in many cases, these types of procedures fall under the responsibility of local authorities which, in many Member States, do not always consistently have the same degree of maturity of eGovernment service availability as the national portals.

Likewise, the degree of availability concerning procedures relating specifically to the service provider/profession that is being exercised (e.g. recognition of professional qualifications as an architect or applicable licences to act as a travel agent) differs significantly among Member States. In some cases, the portals offer comprehensive information, including the possibility to complete such procedures online (e.g., in Cyprus, Luxembourg, and Sweden). In other cases, the information available is still patchy and it is not yet possible to complete procedures electronically at all.

Interestingly, in conclusion, tax and financial formalities and social security formalities, that are not strictly mandatory under the Services Directive, are relatively well covered by the portals overall. This shows that many Points of Single Contact already go somewhat beyond the specific requirements of the Services Directive.

One possible reason for this finding can be that many Point of Single Contact websites were built from existing eGovernment portals. Hence, even if they are newly created, they adopted the country's national approach to eGovernment which, in many cases, includes already well-developed electronic procedures for taxes and social security.

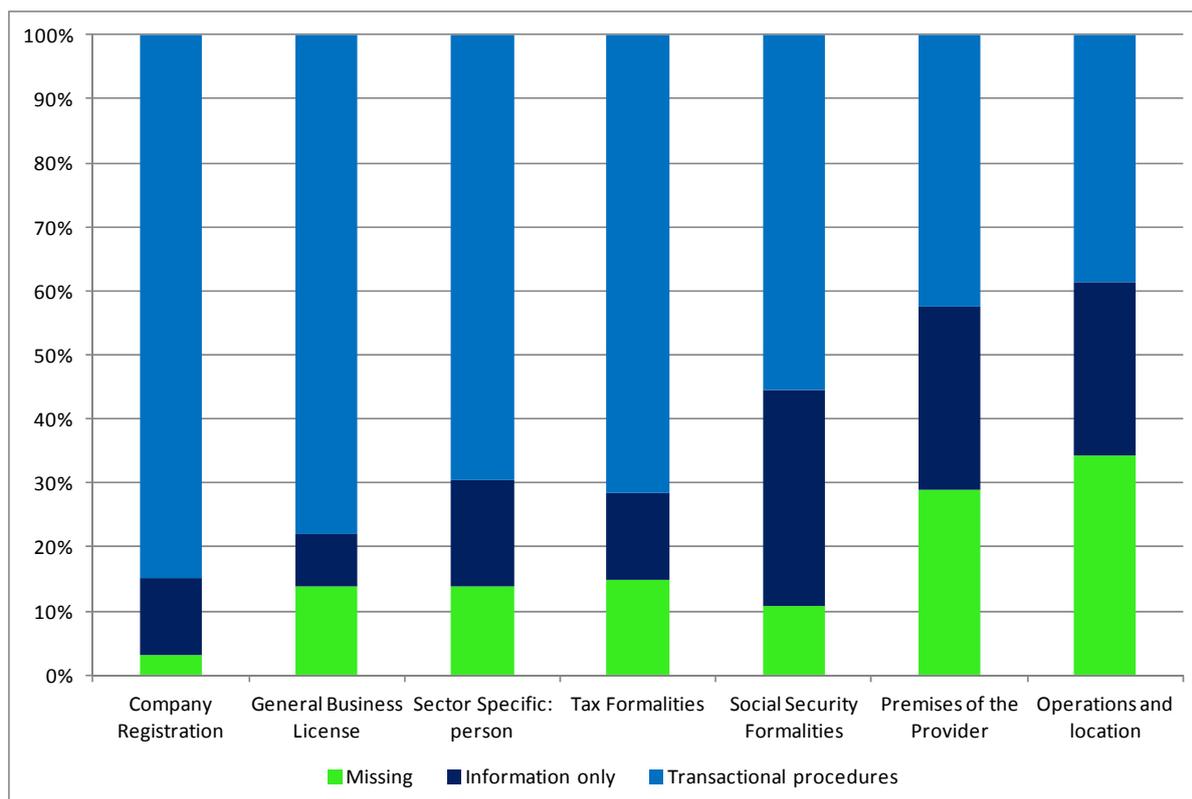


Figure 12 - Online sophistication: the extent to which groupings of procedures are available online

There were no major differences between the three sectors included in the scenarios. The architecture, catering and travel sectors have transactional procedures for 53%, 54% and 59% of cases, and information only for 28%, 25% and 24% respectively. Nineteen per cent of the procedures were missing for the architecture sector, 21% for the catering sector and 17% for the travel sector. As there is very little difference between the sectors, there is currently no real best practice or worst practice to be observed in this regard.

2.3.4 Putting in place functioning electronic procedures across the EU: the importance of key technical enablers

One of the core issues to be tackled in order to put in place functioning electronic procedures across the EU, is the interoperability of national solutions. These solutions should ensure the identification and authentication of service providers (including their eSignatures) and the electronic exchange of supporting documents through the Point of Single Contact. Over the last years, bearing in mind the overarching objective of the facilitation of cross-border service provision and of administrative simplification, some progress has been made in working towards interoperable solutions.

In this sub-section of the report, the Member States' policies with respect to a number of key technical enablers are summarised and illustrated briefly. The solutions adopted by different Member States and the implications these may have for users both within a Member State and abroad are examined. They include such issues as: How can applicants submit an application for a permit electronically? What means of identification and eSignatures are accepted? How can supporting documents be submitted? These key technical enablers are represented chiefly by policies about electronic identities (eIDs) and eSignatures that support the provision of electronic services through the Points of Single Contact.

Sub-sections 2.3.4.3 and 2.3.4.4 of this report cover other technical enablers, such as ePayment services and available tracking facilities to monitor ongoing procedures

The obligation for Member States to provide Points of Single Contact that allow the electronic completion of procedures has to be understood in the context of the obligation to administrative simplification. This is specified in Commission Decision 2009/767/EC which states that Member States should first carry out a risk assessment for each individual formality to determine if an eSignature is

needed and at which level. Member States should not require the use of qualified eSignatures in all cases. If eSignatures are required in the context of eProcedures, under Commission Decision 2009/767/EC, Member States have to accept as a minimum advanced eSignatures supported by a qualified certificate. If justified, this is also supported by a secure signature creation device (i.e., qualified eSignatures). Moreover, under Decision 2011/130/EU Member States have to be able to process certain formats of advanced eSignatures technically (C/X/PAdES)¹⁰.

2.3.4.1 Use of electronic identification and eSignatures

The use of electronic identification (eID) (including the question of whether electronic identification may be required, and at which level of reliability) has not yet been regulated specifically at EU level. However, Member States' autonomy to choose appropriate eID solutions for their Points of Single Contact (including within a cross-border context) is limited by the requirement of administrative simplification under Article 5 of the Services Directive and the specification that foreign service providers should also be able to easily use the portal. In addition, a general EU legislative framework for eSignatures was developed through the eSignatures Directive 1999/93/EC. In the case of the Services Directive, this is complemented by a series of implementing acts, notably Decision 2009/767/EC, as amended by Decision 2010/425/EU, and Decision 2011/130/EU, to enhance the cross-border availability and usability of eSignatures¹¹. Under Article 5.3 of the Services Directive, Member States should only require the submission of original documents, certified copies or certified translations in limited cases when this is justified by an overriding reason of public interest.

The concepts of electronic identification and, even more so, electronic signature are often used to define different solutions which could generate confusion in terms of data analysis. The definitions of official eIDs, eSignature and qualified electronic signature that are used for the purposes of this study are therefore described below¹².

Official eIDs are considered to be those eIDs which are issued directly by public sector bodies in the service provider's country of establishment or by private sector entities with a mandate of the public sector.

eSignature or electronic signature are defined as: data in electronic form which are attached to or logically associated with other electronic data and which serve as a method of authentication with regard to this data (this also includes non-Public Key Infrastructure solutions).

Qualified electronic signature is defined as an advanced electronic signature which is based on a qualified certificate and which is created by a secure-signature-creation device, as defined in the eSignatures Directive 1999/93/EC¹³.

A Public Key Infrastructure (i.e., data authentication based on cryptography) is used in many Member States that implement eIDs and qualified eSignatures. The physical infrastructure for electronic identification is often represented by a chip embedded in a national ID or a social security card. Qualified electronic signature solutions can be embedded in the same physical infrastructure as the eID or alternatively they can be issued by a list of providers.

Procedures to be followed by citizens and businesses in order to obtain eID and eSignature solutions vary widely across countries. They can be fully automated (meaning that users can obtain or request them remotely via the internet, as is the case for non-qualified signatures), or they can require a visit or visits to the physical offices that issue them (for qualified signatures and official eIDs). Automated procedures are usually received positively by end-users. Members of focus groups often complained about the need to go to physical offices in order to obtain the electronic identification and signature

¹⁰ These are common advanced eSignature formats.

¹¹ See: [http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32009D0767R\(01\):EN:NOT](http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32009D0767R(01):EN:NOT) and <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:053:0066:0072:EN:PDF>

¹² Definitions for eSignature and qualified eSignature from IDABC (2009), *Study on Mutual Recognition of eSignatures: update of Country Profiles Analysis & assessment report*, p. 16

¹³ Advanced electronic signature: an electronic signature which meets the following requirements:

(a) it is uniquely linked to the signatory;
(b) it is capable of identifying the signatory;
(c) it is created using means that the signatory can maintain under his sole control; and
(d) it is linked to the data to which it relates in such a manner that any subsequent change of the data is detectable;
Again, this definition may cover non-Public Key Infrastructure solutions.
(Source: Ibid.)

tools required. Administrative requirements for obtaining these tools commonly include citizenship (including the presentation of a national registration number or tax number) or proof of official residence for a foreigner. In the overwhelming majority of cases, obtaining an eID and/or an eSignature requires payment of administrative fees. At the same time the underlying idea of cross-border access to eProcedures is that once an official eID and eSignature (at least a qualified certificate-based one) has been obtained in a Member State it can be used in other Member States. This implies that the efforts made initially are compensated by a potentially wide usage both at national level and across borders, and even more so if eID cards allow for both identification/authentication and signing.

Other solutions are based on bank identification systems which have been embedded in the national eGovernment structure (as in the cases of Denmark, Estonia, Finland, and Lithuania). Typically, these solutions are ill equipped to support use by foreign end-users. This is because the person or entity is often requested to have an official residence in the particular Member State in order to open a bank account there.

Table 1 below provides an overview of Member States' requirements for official eIDs and qualified eSignatures for national users for at least one of the scenarios included in the study. Given that many Point of Single Contact portals do not provide electronic procedures directly but redirect users to the websites of competent authorities, the analysis was enlarged to include those portals as well.

Table 1 – Member States' requirements for Official eIDs and qualified eSignatures (national users)

PSC	Official eID required	Qualified eSignature required
AT	No	No
BE	Yes	Yes
BG	No	Yes
CY	No	Yes
CZ	No	No
DEB	No	Yes
DEH	No	Yes
DER	No	Yes
DK-BID	No	No
DK-VIRK	Yes	Yes
EE	Yes	Yes
EL	No	No
ES	Yes	Yes
FI	No	No
FR	No	No
HU	Yes	Yes
IE	No	No
IS	Yes	Yes
IT	Yes	Yes
LI	No	No
LT	Yes	Yes
LU	Yes	Yes
LV	Yes	Yes
MT	Yes	Yes
NL	No	No
NO	Yes	Yes
PL	No	No
PT	Yes	Yes

RO	No	No
SE	Yes	Yes
SI	Yes	Yes
SK	No	Yes
UK	No	No
Total	15	21
Percentage of Portals	45%	64%

Note: the Romanian Point of Single Contact was not online at the time of testing (summer 2011), nor was the planned Public Key Infrastructure in place. The Danish (DK-BID) portal is designed explicitly for use by foreign users, therefore it does not require national eIDs and/or eSignatures.

Based on the analysis, it emerges that 15 out of the 33 portals examined (or 45% of the total number) require the use of official eIDs for online procedures. The picture is somewhat different for qualified eSignatures, which are required by 21 portals (or 64% of them).

In addition to official eIDs, other methods of identification used on the countries' Points of Single Contact are simple combinations of username and passwords that users obtain on registration to the portal (as is the case for Ireland and the United Kingdom). Other solutions are based on username and password, which are obtained by an eID through registration to the portal and then activation of a link (as is the case in Slovakia).

Electronic identification, when supported, is mostly required to access online services that inherently require identification and authentication of the person behind the request (e.g., for secured personal areas or for access to secured areas to upload particular documentation). Sections containing general information about online guides, procedures and support tools are almost universally available on the portals without identification.

Electronic signatures are used for data authentication purposes and to express consent. These can be cases where a service provider using the Point of Single Contact is required to submit a document and the integrity of the document needs to be preserved, or must acknowledge or verify its agreement with the contents of a document. Examples include forms that request registration on business registers or tax registers or declarations to confirm compliance with specific requirements for services.

2.3.4.2 Supporting documentation: submission and translation requirements

In this sub-section, the main requirements concerning the modalities and characteristics of supporting documentation, and the submission and translation of non-national documents is discussed.

All the types of administrative requirements included in the study require the submission of one or more submission forms and supporting documentation for the completion of the procedures. There is great variation among countries regarding the number of documents to be submitted, as well across the eight types of administrative procedure. They range from five procedures (for Austria and Liechtenstein) to more than 50 (for Malta). Countries with integrated online procedures (procedures that combine company registration, tax and social security formalities, which are implemented in several Member States such as Italy and Estonia) usually require a lower number of documents to be submitted. However, differences in legislation and unclear information make comparisons quite difficult (many documentation requirements are determined by local authorities, and they may differ within the same country even for the same procedure). On average, across the 33 portals included in the study, procedures regarding operations and locations are those that require a higher number of documents (more than four). These procedures are followed by company registration, general business licences and sector-specific person-related procedures. Tax and social security formalities are the administrative procedures that on average require fewer documents (less than two).

As a first step, the relative weight of the degree of requirement for supporting documentation was considered: the type of supporting documentation to be provided was explored (i.e., whether originals, certified copies or simple copies were requested). The 33 portals were divided into two groups on the basis of the burden imposed in terms of the requirements for supporting documentation. Those portals requiring originals and/or certified copies in more than half of the cases were classified as being ones

with "high requirements". Conversely, those portals requiring simple copies (such as scanned versions) for at least half of the documents required for the eight types of administrative procedures analysed were termed as those with "low requirements".

As Table 2 shows, the majority of portals (18 or 55%) are classified as those with "low requirements"¹⁴. In these cases, simple copies are required which can usually be submitted electronically, either by directly uploading them on the portal (whether on the portal of the Point of Single Contact or the portal of a competent authority to which users are redirected) or by email. The most common format (accepted by all the countries supporting this solution) is that of .pdf documentation. In general, less sophisticated solutions are supported together with the online submission. Users are offered the option of sending the required supporting documentation physically in all the countries, even those portals that show the highest levels on full case-handling such as Estonia. Online submission is most common for certain types of administrative requirements (mainly, company registration, general business licence and tax formalities). One of the best performers with respect to requirements for supporting documentation is Iceland, where Point of Single Contact staff estimated that a very small percentage of original documents are required for the services provided by the portal (i.e., for six out of a total of 75 procedures).

Only a very limited number of portals allows online submission of supporting documentation for sector-specific person-related procedures, as they also include recognition of professional qualifications. For instance, the Cyprus Point of Single Contact covers explicitly procedures related to the recognition of professional qualifications. In Greece, sector-specific procedures allow for only one document – and application – to be completed on-line; however, all complementary documentation required can be uploaded along with the application and be submitted on-line via the Point of Single Contact.

As far as requirements for the submission of certified copies is concerned, this varies according to the procedure. Findings show that, for company registration and sector-specific licensing procedures, certified copies are needed whereas, for tax and social security formalities and cross-border procedures, originals are needed. In the Netherlands, registration as an architect is one of the few examples of a full online case-handling transaction.

¹⁴ The Point of Single Contact for Romania is not included in this analysis, as it was not online at the time of testing (in summer 2011). Therefore the percentages in this table do not add up to 100%.

Table 2– Requirements for supporting documentation

PSCs requiring High Requirements	PSCs requiring Low Requirements
BG	AT
CY	BE
CZ	DEB
EE	DEH
EL	DER
ES	DK-BID
FR	DK-VIRK
IE	FI
IT	HU
LV	IS
NL	LI
NO	LT
SE	LU
	MT
SK	PL
	PT
	SI
	UK
42%	55%

As a second step in the analysis of supporting documentation, the requirements imposed by countries with regard to their translation were considered. As before, countries were divided in two groups, namely:

- Those Points of Single Contact that impose high requirements in a majority of examined processes by requiring translation for the majority of supporting documentation needed for the different procedures;
- Those Points of Single Contact that impose low requirements in a majority of processes by not asking for translation of supporting documentation.

There are still notable differences among portals, as shown in Table 3.¹⁵ The situation is not very dissimilar to that concerning submission of supporting documentation: slightly more than half of the portals (19 or 58%) are considered as those with “low requirements”. There are countries where all or almost all supporting documents not issued in the national language have to be translated (such as in Austria and Greece). At the other end of the spectrum, there are countries where none or a very small proportion of the supporting documentation has to be translated (such as in Estonia and Iceland). Evidence from countries also shows that translation is most often asked for in the cases of company registration and services relating to an individual or profession (such as in the cases of the *Land* of Brandenburg - Germany Latvia, and the United Kingdom). General business licence, tax procedures, and social security procedures are also often found to need the translation of documents (as in Bulgaria and the United Kingdom).

¹⁵ The Point of Single Contact for Romania is not included in this analysis, as it was not online at the time of testing (in summer 2011). Therefore the percentages in this table do not add up to 100%.

Table 3 – Requirements for translation of supporting documentation

PSC requiring High Requirements	PSC requiring Low Requirements
AT	BE
BG	DER
CY	DK-VIRK
CZ	EE
DEB	ES
DEH	FI
DK-BID	FR
EL	HU
UK	IE
IS	IT
LI	LT
PL	LU
SI	LV
	MT
	NL
	NO
	PT
	SE
	SK
39%	58%

From the previous analysis and from the country reports, it emerges that the simplification of administrative requirements for supporting documentation is a process that is far from completion, and there are notable differences across countries. The administrative burden imposed on businesses greatly varies, and Points of Single Contact are not always fully aligned with the latest legislative provisions. There are cases (such as Greece) where new legislation that simplifies the requirements for licencing procedures has been issued, but the new legislative framework has not yet been incorporated by the portal. Given the continual developments and improvements of Point of Single Contact portals, however, it is likely that the situation will improve progressively.

2.3.4.3 ePayment Facilities

Government ePayment systems facilitate the online payments by citizens and businesses of government services. In the case of payments for full online transactions, they are an essential enabler that enhances the digital experience of users and makes the fully electronic completion of procedures a reality.

Of the 33 Points of Single Contact analysed, ten provide ePayment solutions. All of these ten portals facilitate the use of credit cards, while eight also provide the possibility to use debit cards. The figures improve when these include the possibility to make an online bank transfer which indicates the date/number of the transaction.

These findings can be associated with the extent to which payments are required on the Points of Single Contact. The experts assessed the degree to which payment was feasible for the procedures in relation to the eight groupings of administrative formalities and the availability of ePayment solutions.

For 44% of the groupings of procedures, a payment was required but in only 33% of these cases were ePayment solutions available.

Figure 13 provides an overview of the payment requirements by grouping of procedures, and shows the percentage of groupings for which payments are required, the percentage of groupings for which ePayment solutions are available, and the percentage of ePayment solutions available for the groupings where payments are required. The highest percentage of available ePayment solutions is for tax formalities at 60%. Other high-ranking ePayment procedures, at 46% and 36% respectively, are company registration and social security formalities.

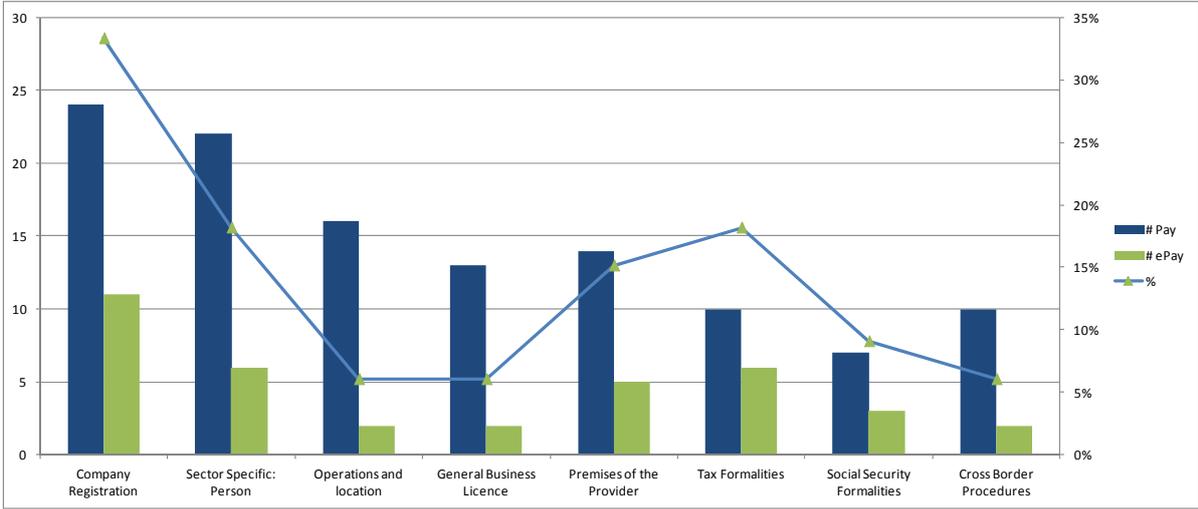


Figure 13 – ePayment Facilities

The table on the next page, Table 4, shows the ePayment solutions that are available for each country.

Table 4 – ePayment solutions supported

ePayment Solutions offered				
	No	Yes	Types of solutions offered	
			Credit card	Debit card
AT	v			
BE	v			
BG	v			
CY		v	v	
CZ	v			
DEB	v			
DEH		v	v	
DER	v			
DK-BID	v			
DK-VIRK	v			
EE		v	v	v
EL	v			
ES		v	v	v
FI	v			
FR	v			
UK		v	v	v
HU	v			
IE		v	v	v
IS	v			
IT		v	v	
LI	v			
LT	v			
LU	v			
LV		v	v	v
MT	v			
NL	v			
NO	v			
PL	v			
PT		v	v	v
RO	v			
SE	v	v	v	
SI	v			v
SK	v			v
% of PSCs enabling ePayment	70%	30%	100%	80%

ePayment solutions are available in ten countries: Cyprus, Estonia, Germany - the *Land* of Hessen, Ireland, Italy, Latvia, Portugal, Spain, Sweden, and the United Kingdom. Bank transfer is definitely available in Estonia, Finland, Iceland, Ireland, Italy, Germany - the *Land* of Hessen, Greece, Latvia, Lithuania, Luxembourg, Spain, and the United Kingdom.

Direct online bank transfers are supported in more than 50% of the countries, including Estonia, Finland, Greece, Ireland, Iceland, Italy, Latvia, Lithuania, Luxembourg, Spain and the United Kingdom.

2.3.4.4 *Electronic tracking and delivery of administrative decisions*

Electronic tracking features provide end-users with the possibility to follow the status of an application online. Fewer than half of the Points of Single Contact evaluated have these tracking facilities.

Table 5 - Tracking facilities

PSCs Supporting Tracking Facilities	PSCs Not Supporting Tracking Facilities
BG	AT
CY	BE
DEH	CZ
DER	DEB
ES	DK-BID
HU	DK-VIK
IT	EE
LI	EL
LV	FI
NO	FR
PT	IE
SE	IS
SK	LT
UK	LU
	MT
	NL
	PL
	SI
	RO
44%	56%

Note: The table aggregates eight groups of procedures. All countries providing tracking facilities for at least four groups of procedures are classified as "providing tracking facilities"; all countries providing tracking facilities for fewer than four of the administrative tasks (i.e. zero to three) are classified as "not providing tracking facilities".

An analysis of the availability of tracking features by grouping of procedures demonstrates that 55% of the company registration procedures have tracking facilities. Facilities were found for the cross-border procedures in 30% of the cases. In general, tracking facilities are not very developed: on average, for the eight types of administrative procedures examined, tracking facilities are provided in only 31% of cases.

Company registration is the type of administrative procedure that is most supported by tracking facilities. Lower levels of tracking support are offered in the cases of the premises of the provider and operations and location procedures (i.e. 18%).

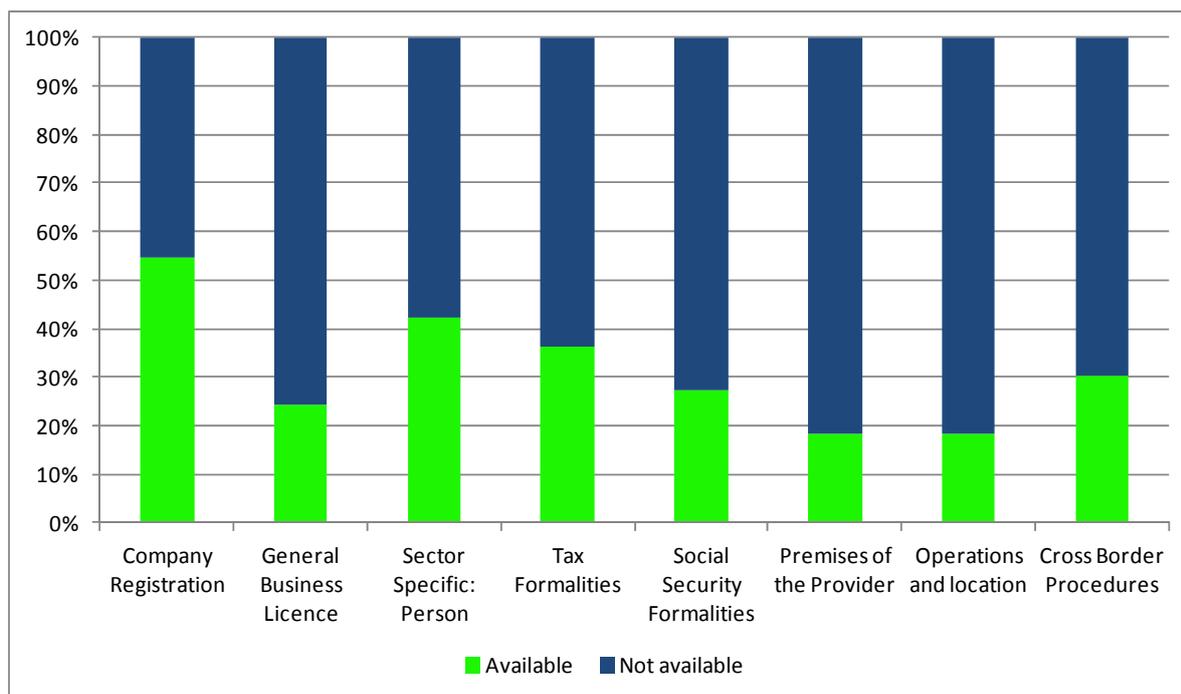


Figure 14 – Available means for electronic tracking and delivery of administrative decision

2.3.5 Availability and quality of help services

Assistance services for Points of Single Contact users on how to use the different portals are needed to make them more usable and attractive. Ten different forms of help services were identified on different Points of Single Contact sites. There is a clear range of services available. They differ between the more static forms of help (that are, in fact, more commonly available) and the more interactive forms of help (that are available less often).

Currently, there are only four forms of service that are on offer on more than half of the Points of Single Contact (between 15 and – at the highest level – 25 of the 33 portals). These tend to be the more static forms of help. The most frequently available level of service is the opportunity to download guidelines or help documents. Opportunities for individual advice; dedicated telephone help-lines; and Frequently Asked Questions (FAQs) are also commonly available.

Two kinds of self-help tools are seen less often: they are the availability of video clips or explanatory demos or case studies (both are seen on only between five and ten portals).

Hence, most of the portals do not yet take the fullest advantage of the opportunities offered by interactive help systems like user forums and chat facilities. A chat facility is offered only by the Dutch Point of Single Contact.

In the Netherlands, assistance is provided in a variety of ways (including forums and FAQs). The website offers the users the possibility to contact the organisation through a general email address (which has the aim to respond to the enquirer in the space of two days), a telephone number and a chat session (both can be used between 9:00-12:00 and 14:00-17:00). The average number of questions posed is around 300 a week (45% by phone, 45% by e-mail and 10% by chat).

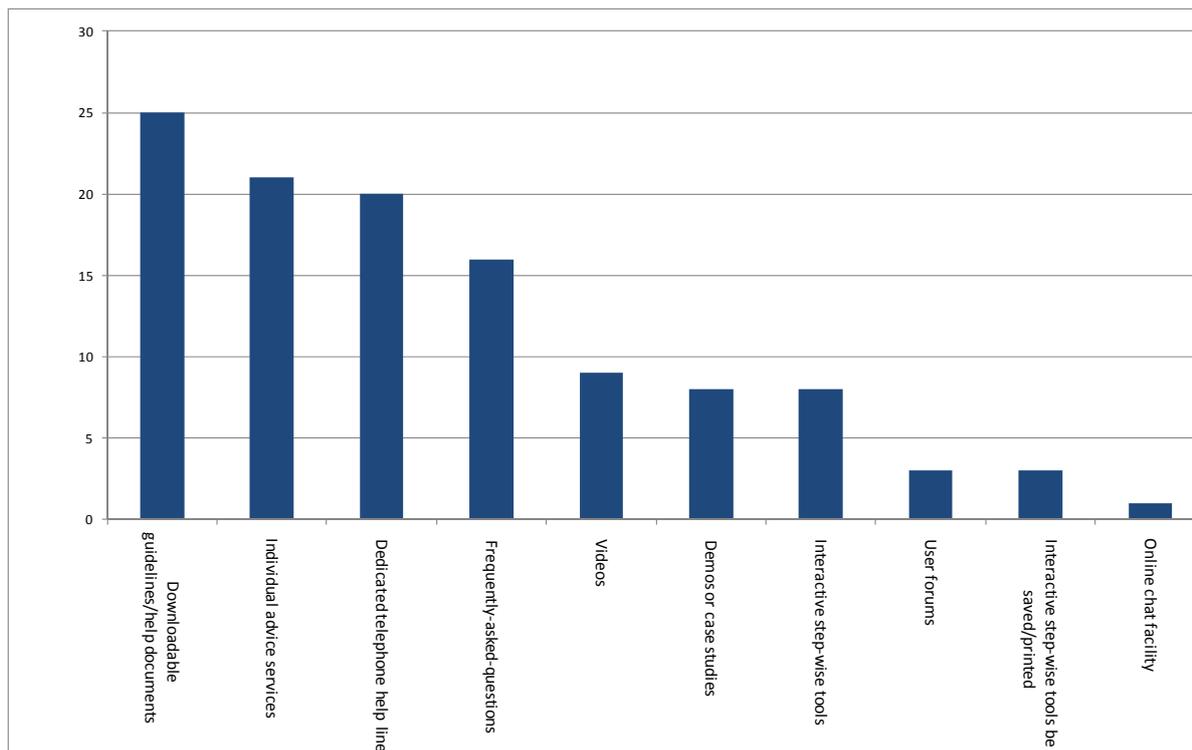


Figure 15 – Help channels available at the portal

As a part of the study methodology, a standard query was formulated. It was sent to the Points of Single Contact as a test of their help service. The query was about the steps to be undertaken in order to provide temporary architect services¹⁶.

The standard test query was sent to 27 (or 82%) out of the 33 portals included in the study. In the remaining six cases (or 18% of the portals) the question was not sent, mainly because support via email was not provided by those sites. More precisely, there were three reasons why this could not be done. Either the email support that was available was limited to technical issues (as in the case of the Bulgarian Point of Single Contact); or it was simply not available to users (as was the case of the French and Finnish Points of Single Contact); or the Point of Single Contact had not yet been launched at the time of the test (as in the cases of Romania and Slovakia). Only in one case (the Danish DK-VIRK portal), was the question not sent because it was not pertinent (this website is designed for Danish-based businesses only).

Twenty-two (or 67%) out of the 27 questions sent received an answer. The average response time was of two and a half days. Even in this case, however, there were considerable variations registered between countries in terms of response time. It ranged from one working day (in the cases of Czech Republic, the Netherlands and Sweden, among others) to 15 days (Latvia). In two cases (Belgium and Spain) the answer was given by phone, so that no additional email was necessary. Five queries (or 15%) did not receive any answer (namely, in the *Land* of Hessen - Germany, Greece, Hungary, Poland, and Slovenia).

Concerning the clarity of the answers, 18 out of the 22 responses received (or 82%) were clear, comprehensive and helped in resolving the issue. In the remaining four cases (or 18%), the answer provided by the help service was not considered to be sufficiently clear and detailed to provide a solution to the query posed. In those cases, the answers provided were either quite general or were automatically generated by the system and therefore did not offer any qualified support. In the first case, they simply redirected the enquirer to other web pages where users could find additional information (as in the cases of Austria, Latvia, and the United Kingdom). In the second case (answer

¹⁶ The full text of the standard query read as follows: "I am established as an architect. I am interested in providing my services to a client in your country on a temporary basis. I tried to use your portal to find out what administrative steps I need to take before doing so, but I am not sure if I found all relevant information. Can you please tell me exactly what steps I have to take and which documents to submit before I can start working (e.g. recognition of prior qualifications, proof of professional liability insurance, information on criminal record)? Could you also tell me how to submit my application?"

automatically generated by the system), no qualified support was provided (e.g., as was the case for the *Land* of Rhineland-Palatinate - Germany).

2.3.6 Overall availability and quality of Point of Single Contact services for users from abroad

The study examined the overall availability and quality of the services offered by the Points of Single Contact, specifically for users from abroad, in terms of what it calls the **cross-border dimension** of doing business in a foreign country. It did so in three ways: examining the linguistic support offered to foreign users of the portal, assessing the ease of identifying and understanding the applicable requirements, and investigating the degree to which it was possible for foreign users to complete procedures electronically through the Points of Single Contact.

2.3.6.1 Language availability

Although not an obligation under the Services Directive, it is important to note that around three-quarters (73%) of the portals examined provide at least some degree of information in other languages (see Table 6 below), while only about a quarter (21%) of the portals appear to be available in a single language. These are those of Austria, Bulgaria, France, Hungary, Ireland, and Liechtenstein.

A minority of these (45% of all portals) offer translation on information on regulations and requirements – these include Iceland and Malta. Only 24% of the portals offer translations of at least some application forms that need to be filled in: these are the portals of the German Land of Brandenburg; the BusinessinDenmark (Danish) portal; Estonia, Finland, Iceland, Malta, Netherlands, and Sweden. It is more common to find translation that relates to email/chat assistance (58% of all portals) than translation of the telephone help service (46%).

Table 6 – Points of Single Contact availability in different languages

	Numbers of PSCs	Percentage of PSCs	List of PSCs
Is the portal available in other languages?	24	73%	BE, CZ, DER, DEH, DEB, DK-BID, EE, EL, ES, FI, IS, IT, LT, LU, LV, MT, NL, NO, PL, PT, SE, SI, SK, UK
Portals not available in other languages	7	21%	AT, BG, FR, HU, IE, LI
To what extent is translation available:	Number of portals	Percentage of PSCs having translations available (% of all)	PSCs providing linguistic support
General information	24	100% (73%)	BE, CZ, ES, EL, EE, DK-BID, DER, DEH, DEB, FI, IT, LT, LU, LV, MT, NL, NO, PL, PT, SE, SI, UK
Information on regulations and requirements	15	63% (45%)	BE, CZ, DEB, DK-BID, EE, ES, FI, IS, LT, LU, MT, NL, PL, PT, SE
Application forms to be filled in	8	33% (24%)	DEB, DK-BID, EE, FI, IS, MT, NL, SE
Telephone help service	11	46% (33%)	CZ, DEB, DEH, DER, DK-BID, FI, LT, LV, MT, NL, NO, PT, SE
Email/chat assistance	14	58% (42%)	CZ, DEB, DEH, DER, DK-BID, EL, ES, IS, IT, LT, LV, MT, NL, NO, PL, SE

NOTE 1: Poland and the Czech Republic use Google Translate for the online translation of their portal's web pages. These two Member States' portals have not been taken into account when calculating the average number of languages per portal. All countries providing translations offer at least information in English. In a limited number of cases, portals provide additional translations in other languages, namely:

- DEH and DER have translations in French;

- The portals of Estonia and Latvia have translation into Russian available;
- Spain offers Portuguese translation;
- Finland offers Swedish translation.

NOTE 2: All names used in this chart are the abbreviations for the various European languages used on the EU-GO portal http://ec.europa.eu/internal_market/eu-go/ with five exceptions. These are the three websites investigated in the German *Länder*: Brandenburg (DEB), Hessen (DEH), Rhineland-Palatinate (DER), Denmark - BusinessinDenmark (DK-BID) and, in and when appropriate, Denmark - VIRK (DK-VIRK).

NOTE 3: In the first part of the table, percentages do not add to 100% as two portals were taken out of the count: DK-VIRK and Romania. Indeed, the Romanian Point of Single Contact was not online at the moment of testing, while the DK-VIRK portal is designed for Danish users and therefore does not provide linguistic support for foreign users.

Source of data: elaboration from Table 13 of the country reports which outlines the experts' assessment of the linguistic support available.

2.3.6.2 Ease of understanding applicable requirements

Irrespective of the language barrier, it is often not easy for a non-national user to identify and understand the administrative requirements that apply to a particular business situation without knowing anything about the administrative and legal reality of a given Member State. This is particularly difficult for the different business scenarios studied. It is notably the situation where a business wants to establish itself in comparison to the context where a service provider only wants to provide its services temporarily in another Member State.

The experts and focus groups assessed to what extent the portals provide a clear distinction for foreign businesses that are considering permanent business activity (i.e., establishment) in comparison to temporary service provision (i.e., without the need for business establishment in that country). This distinction could be found in fewer than half of the Points of Single Contact (40%).

In Figure 16 and Figure 17 below, the answers of national users (i.e. national focus group participants) and foreign users (i.e. cross-border focus group participants) to questions about the extent to which the portals provide a clear distinction for foreign business considering permanent and temporary trading are compared. Users could give qualitative answers based on a Likert scale (from strongly disagree to strongly agree). As the figures show, national and foreign focus groups' opinions are not always aligned.

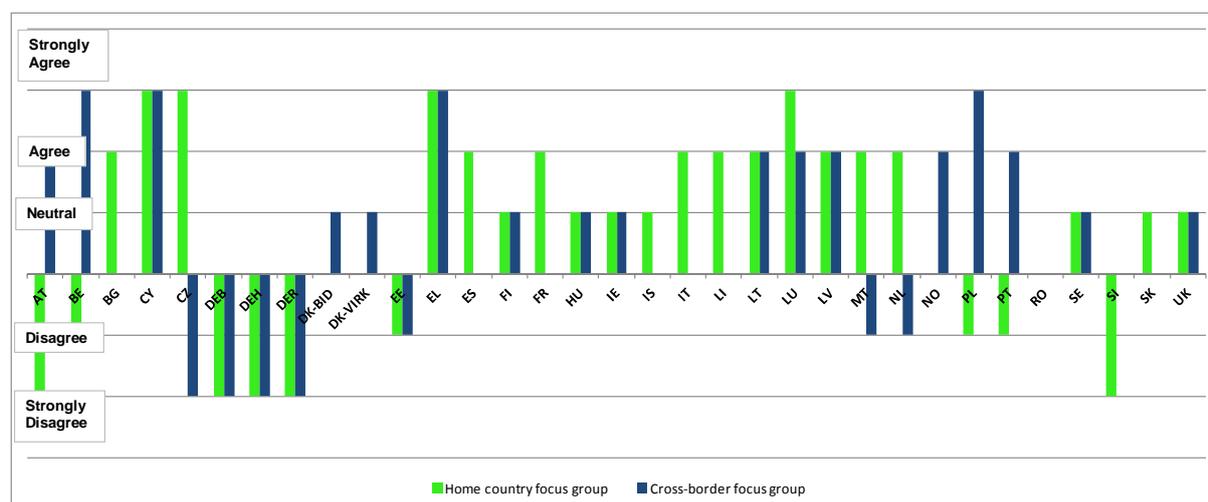


Figure 16 - Question: The portal provides a clear distinction for foreign businesses considering permanent (i.e. an establishment) and temporary trading (i.e. without an establishment in that country)

When investigating whether or not the Points of Single Contact provide a clear distinction for foreign businesses considering either permanent (i.e. an establishment) or temporary trading (i.e. without establishment in that country), Figure 16 shows that in countries such as Cyprus, Greece and Luxembourg, the focus group participants strongly agree with the above-mentioned statement.

At the other end of the spectrum, in some countries, focus group participants strongly disagree. This is the case for e.g. the three German *Länder* and Estonia.

For some countries, the perception of this distinction differs when the 'home country focus group' results are compared with the results with the 'cross-border focus group'. This was the case, for example, in Austria, Belgium, and the Czech Republic.

Where this clear distinction exists, almost one half of the number of people in the focus groups or interviewed either agree/agree strongly that users can understand easily the different requirements. A substantial group of respondents were neutral about this matter whereas around one-quarter disagree or disagree strongly. Very similar percentages of respondents acknowledged that, even without knowing anything about a country's administrative and legal system, a foreign business could easily understand all requirements that had to be fulfilled to complete the scenarios that they were asked to complete.

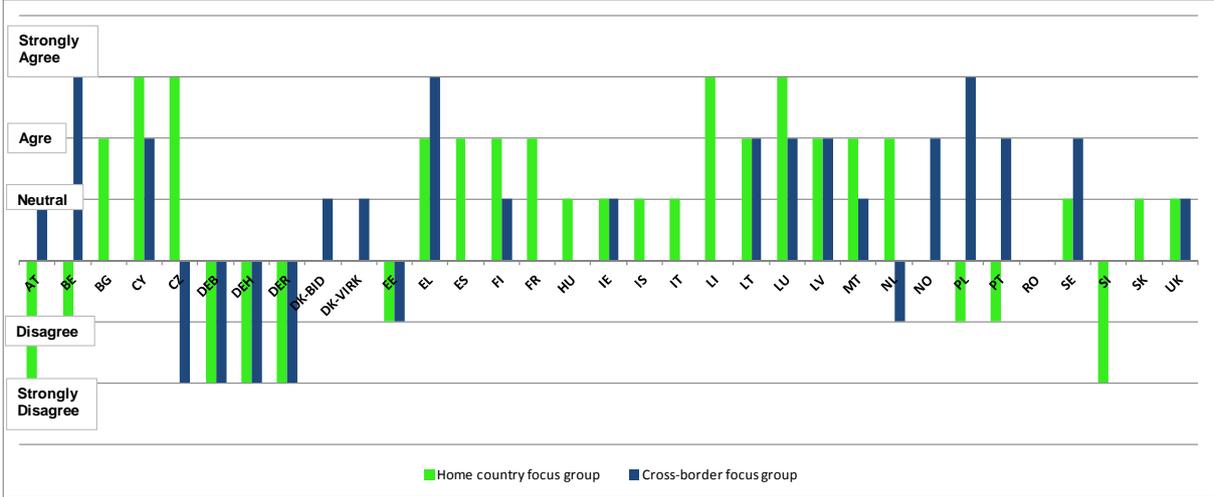


Figure 17 – Question: Even without knowing anything about the country's administrative and legal system, a foreign business could easily understand all requirements that had to be fulfilled to complete the scenario

When assessing the statement "Even without knowing anything about the country's administrative and legal system, a foreign business could easily understand all requirements that had to be fulfilled to complete the scenario", focus group participants in most countries either agree, strongly agree with this statement or are "neutral" in their reply.

Countries where focus group participants are particularly in agreement with this statement include Cyprus, Greece, and Luxembourg. In some countries / states (such as the three German *Länder* and Estonia) this is – according to focus group participants – not the case.

Given the considerable difference that exists legally and administratively for entrepreneurs between setting up a business abroad and simply exercising their business activity temporarily, it is evident that the distinctions between these two modes of operating and the explanations given about them are not yet sufficient.

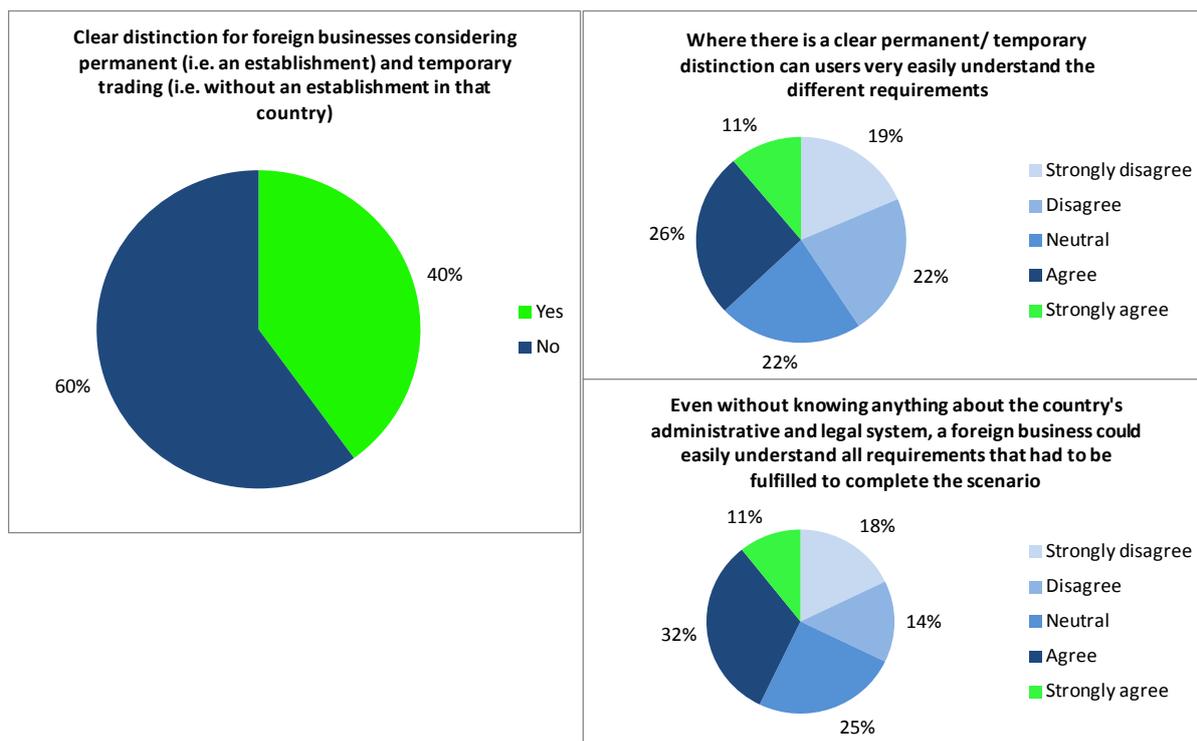


Figure 18 - Clarity of administrative requirements for foreign businesses (establishment and temporary cross-border cases)

2.3.6.3 Cross-border online procedures

At the national level, no specific problems were reported concerning identification and authentication issues related to the electronic procedures. However, when cross-border accessibility is examined, the situation is less positive. Where Member States have put in place requirements to use official electronic identification and/or qualified eSignatures, this can often create important technical barriers for foreign service providers wishing to make use of the Point of Single Contact. Cross-border e-service delivery, as required by the Services Directive, entails that it must be possible for Member States to deal with eIDs and eSignatures other than the national eIDs or eSignatures or that they must provide an alternative solution for electronic identification and signatures. It would be disproportionate and contrary to the obligations and intentions of the Services Directive to expect businesses to acquire the official eIDs and eSignature tools of all Member States in which they might wish to provide their services.

Considerable barriers exist that make the cross-border use of the Points of Single Contact difficult in practice. These difficulties relate not only to linguistic or organisational barriers, but also to the continued lack of interoperability of the technical solutions used at national level for the identification and authentication of service providers, eSignatures and the electronic exchange of supporting documents through the Point of Single Contact.

Table 7 below provides an overview of Member States' requirements for official eIDs and qualified eSignatures for foreign users in order to complete at least one of the scenarios tested. As was done for the requirements for national users (Section 2.3.3.3), in terms of this issue, the analysis was enlarged to include portals of the competent authorities linked to the Point of Single Contact portals. In addition, the table shows whether foreign eIDs and eSignatures are recognised (i.e. a foreign business with its national eID and eSignature can use them for the online procedure, irrespective of whether they are required or not by the country where the business wants to provide services).

As the table shows, only a limited number of portals require eIDs from foreign users for online services (12, or 36%). Some countries (such as Ireland and the United Kingdom, as well as Finland, France and Poland) do not require eID from foreign end-users which is consistent with the approach adopted vis-à-vis their national users. Indeed, those countries adopt a simpler solution (such as username and

password combination) for both national and foreign users, as they do not have a national eID system. who do not have a national eID system.

Three other countries adopt different solutions for national and foreign users. They require official eIDs while they implement simpler solutions for foreign users. They may implement simple username password combinations (such as DK-BID) or allow users to send scanned copies of their national passports (as in the cases of Belgium and Iceland).

In a small number of cases (Cyprus, Greece and Liechtenstein), foreign eIDs are recognised even if national official eIDs are not implemented. This is the case of Greece, for instance, where, while the implementation of a national eID and eSignature infrastructure has not started yet, a number of foreign official eIDs are recognised (thanks to the implementation of STORK-based solutions¹⁷).

However, in many cases (7, or 21%), eIDs are required for foreign users as well as for national users, while the technical solutions for recognition of foreign eIDs are not implemented. This makes the use of online procedures offered by the Point of Single Contact portals *de facto* impossible for cross-border users. This is the case, Hungary, Italy, Luxembourg, Malta, Norway, Sweden, and Slovenia.

A limited number of countries (4, or 12%) require and recognise foreign official eIDs, together with national identifiers. This is the case for Estonia, Latvia, Portugal, and Spain.

In general, for countries which recognise foreign eIDs, it has to be pointed out that none of them supports eIDs issued in all the other Member States. All of them rely on the work of the STORK large-scale project for eIDs. Therefore, only eIDs from participating Member States can be recognised and used by foreign businesses, i.e. at best eIDs from Austria, Belgium, Estonia, Finland, Italy, Iceland, Liechtenstein, Lithuania, Portugal, Slovenia, and Spain. In some cases, the number of foreign eIDs recognised is even lower: for instance, in Portugal only eIDs issued in Estonia and Spain are recognised.

A few Points of Single Contact – such as that of Estonia – have additional agreements with a limited number of other Member States for eID. In the Estonian case, eIDs via online bank accounts from a limited number of foreign banks are also supported. Hence, if interpreted in the very strict sense that technical solutions from all other Member States are supported, then none of the countries satisfies this condition.

When considering eSignatures, the picture is somehow similar. A limited number of countries requires eSignatures for foreign users, (18, or 55%), while a lower number (10, or 30%) recognises official eSignatures issues in other Member States.

The same types of groups can be identified. There is a group of countries (5, or 15%) that does not require or recognise foreign qualified eSignatures, consistently with the approach adopted for their national users. These are: Austria, Finland, France, Ireland and United Kingdom. In addition, a small number of countries (3, or 9%) adopts simpler solutions for foreign users, such as Belgium, the Danish DK-BID portal, and Iceland.

In a small number of cases (Greece and Liechtenstein, or 7%), foreign, qualified eSignatures are recognised, even if national official eSignatures are not implemented.

There is a larger number of cases (10, or 30%) where qualified eSignatures are required (in the same way as they are for national users), but not recognised. Again, *de facto*, this prevents foreign end-users from using the electronic services provided by the Point of Single Contact or by the linked websites of competent authorities. This is the case for Bulgaria, the German Points of Single Contact in the three German *Länder* analysed, Hungary, Italy, Luxembourg, Malta, Norway, and Sweden.

Finally, another group (7, or 21%) is composed of countries where foreign, qualified eSignatures are required and recognised in the same way as are national qualified eSignatures. This is the case for Cyprus, Estonia, Lithuania, Latvia, Portugal, Slovakia, and Spain. Even in this case, however, only a limited number of foreign qualified eSignatures are recognised, namely in: Austria, Estonia, Iceland, Italy, Liechtenstein, Lithuania, Portugal, Slovenia, Spain and Sweden. There are also bi-lateral agreements, such as that between Slovakia and Czech Republic, under which an eSignature issued in Czech Republic is recognised in Slovakia.

¹⁷ <http://www.eid-stork.eu/>

Table 7 – Member States' requirements for Official eIDs and Qualified eSignatures (foreign users)

PSC	eIDs and eSignatures required		eIDs and eSignatures recognised	
	Foreign eID	Foreign eSignature	Foreign eID	Foreign eSignature
AT	No	No	No	No
BE	No	No	No	No
BG	No	Yes	No	No
CY	No	Yes	Yes	Yes
CZ	No	No	No	Yes
DEB	No	Yes	No	No
DEH	No	Yes	No	No
DER	No	Yes	No	No
DK-BID	No	No	No	No
DK-VIRK	No	No	No	No
EE	Yes	Yes	Yes	Yes
EL	No	No	Yes	Yes
ES	Yes	Yes	Yes	Yes
FI	No	No	No	No
FR	No	No	No	No
HU	Yes	Yes	No	No
IE	No	No	No	No
IS	No	No	No	No
IT	Yes	Yes	No	No
LI	No	No	Yes	Yes
LT	Yes	Yes	Yes	Yes
LU	Yes	Yes	No	No
LV	Yes	Yes	Yes	Yes
MT	Yes	Yes	No	No
NL	No	No	No	No
NO	Yes	Yes	No	No
PL	No	No	No	No
PT	Yes	Yes	Yes	Yes
RO	No	No	No	No
SE	Yes	Yes	No	No
SI	Yes	Yes	No	No
SK	No	Yes	No	Yes
UK	No	No	No	No
Total	12	18	8	10
Percentage of portals	36%	55%	24%	30%

Note: the Romanian PSC portal was not online at the time of testing (in summer 2011) nor was the planned Public Key Infrastructure in place. The Danish DK-VIRK portal is explicitly designed for national users, therefore it does not require or recognise foreign eIDs and/or eSignatures.

Of the 33 Points of Single Contact, 19 (or almost one-half) make the online completion of procedures available for foreign users at the same level as for the national users.

On nine of these portals (i.e., around one-quarter of all those portals examined – 27%), there are no technical barriers at all to this online submission. These portals are located in Belgium, the BusinessInDenmark (Danish) (DK-BID) website, Finland, France, Ireland, Iceland, the Netherlands, Poland, and the United Kingdom. In a smaller proportion (21%), eIDs issued in other Member States are supported at least in part. This is the case in Cyprus, Estonia, Greece, Liechtenstein, Lithuania, Portugal and Spain. Finally, in a slightly higher number of cases (30%) foreign, qualified eSignatures are recognised, in Cyprus, the Czech Republic, Estonia, Greece, Liechtenstein, Lithuania, Latvia, Portugal, and Spain.

It has to be recalled, however, that only a small number of foreign eIDs and foreign, qualified eSignatures are recognised.

Table 8 – Possibility of completing procedures electronically across borders (i.e. by users from abroad)

	Numbers of PSCs	Percentage of PSCs	List of PSCs
Online completion of procedures is possible for foreign users	19	58%	BE, CY, CZ, DK-BID, EE, EL, ES, FI, FR, IE, IS, LI, LT, LV, NL, PL, PT, SK, UK
By what means is online completion of procedures possible?			
- No technical barriers (no eID or eSignature is required)	9	47% (27%)	BE, DK-BID, FI, FR, IE, IS, NL, PL, UK
- Official eIDs issued in other Member States is supported (at least in part)	7	37% (21%)	CY, EE, ES, EL, LI, LT, PT
- Qualified eSignatures issued in other Member States is supported (at least in part)	10	50% (30%)	CY, CZ, EE, ES, EL, LI, LT, LV, PT, SK

Difficulties for cross-border use of the Points of Single Contact due to lack of interoperability

The study shows clearly that much work remains to be done about facilitating the cross-border use of Points of Single Contact portals. The share of all Points of Single Contact that support foreign eSignatures of a limited number of countries is only 30%.

These non-eID user-identification methods include the use of simple user IDs and passwords and/or submission of scanned copies of users' national identification documents. While perhaps less technologically sophisticated and potentially less secure, these solutions have the advantage of greater ease of use and flexibility. This is especially important in cross-border use cases in which the end-users do not have access to a homogeneous set of identification/signature tools. At the same time, this type of solution may pose greater security and data protection challenges, especially in the event that access to personal or sensitive data has to be restricted to the appropriate person.

Portals which have not opted for such simpler alternative means instead support only a smaller list of eIDs and/or eSignatures solutions. In the case of eIDs, solutions are limited to official eIDs supported via the technical outputs of the STORK large-scale pilot, whereas for signatures the emphasis is on signatures based on qualified certificates as required by the aforementioned Commission Decision. In several cases identified in the table above, bi-lateral agreements between countries have been used to expand the range of supported foreign eIDs beyond the scope of STORK; e.g. Estonia indicates that it supports a mobile eID solution offered by a Lithuanian mobile phone operator. Both for eIDs and eSignatures, Member States are selective: no Point of Single Contact can be identified which unambiguously accepts the use of all eIDs supported by STORK. Similarly, no Point of Single Contact currently accepts the use of all eSignatures based on qualified certificates. From that perspective, Point of Single Contact users currently have to determine if their eID and eSignature solutions can be used on a foreign Point of Single Contact on a case-by-case basis; there is not much consistency between countries on this point.

Based on the study team's assessment of the portals, it appears that so far none of the Member States is fully compliant with the Services Directive and with the provisions set out in the Commission Decisions on electronic procedures (notably Decision 2009/767/EC, Decision 2010/425/EU, 2011/130/EU), as far as support for eSignatures from other Member States are concerned. In many countries, however, new regulations for eSignatures are currently being developed and issued. Examples include Cyprus, the Czech Republic, Denmark, the *Land* of Hessen - Germany, and the United Kingdom. In addition, a number of practical solutions have been put in place to make it easier in practice to comply with the above decisions. Therefore, a continuous improvement in levels of compliance is expected in the coming years.

The STORK pilot is regarded with high interest by the Member States as a way to resolve eID/ interoperability challenges in cross-border Point of Single Contact use.

In addition, a significant number of Member States are also taking part in the SPOCS¹⁸ pilot on the Services Directive: nonetheless, at this stage, its influence is less often quoted by the Member States. This can be explained by the fact that this initiative is somewhat less mature than the STORK large-scale pilot which was launched some three years earlier and which has been widely discussed and promoted.

A number of factors should begin to ease cross-border use of Points of Single Contact, the support for eIDs and eSignatures issued in other Member States, and the availability of cross-border online procedures. They include the combination of technical solutions developed by the STORK and the SPOCS projects, and the open source software made available by the Commission in support of Decision 2011/130/EU, for eSignature creation and validation, since August 2011.

2.3.7 Composite availability and sophistication indicator of the Points of Single Contact

A composite availability and sophistication indicator has been calculated by combining the analysis of the availability of information on the procedures required to complete the business scenarios and the online sophistication of online procedures.

The overall availability and sophistication index is the simple average of two components:

- availability;
- sophistication.

The top ten best-scoring Points of Single Contact on this indicator – are in alphabetic order: Cyprus, Denmark, Estonia, Finland, Italy, Latvia, Luxembourg, the Netherlands, Spain and the United Kingdom. It is, however, extremely difficult to identify points of commonality between these ten Member States in terms of the history, scope, and the various services offered by these Points of Single Contact.

¹⁸ <http://www.eu-spocs.eu>

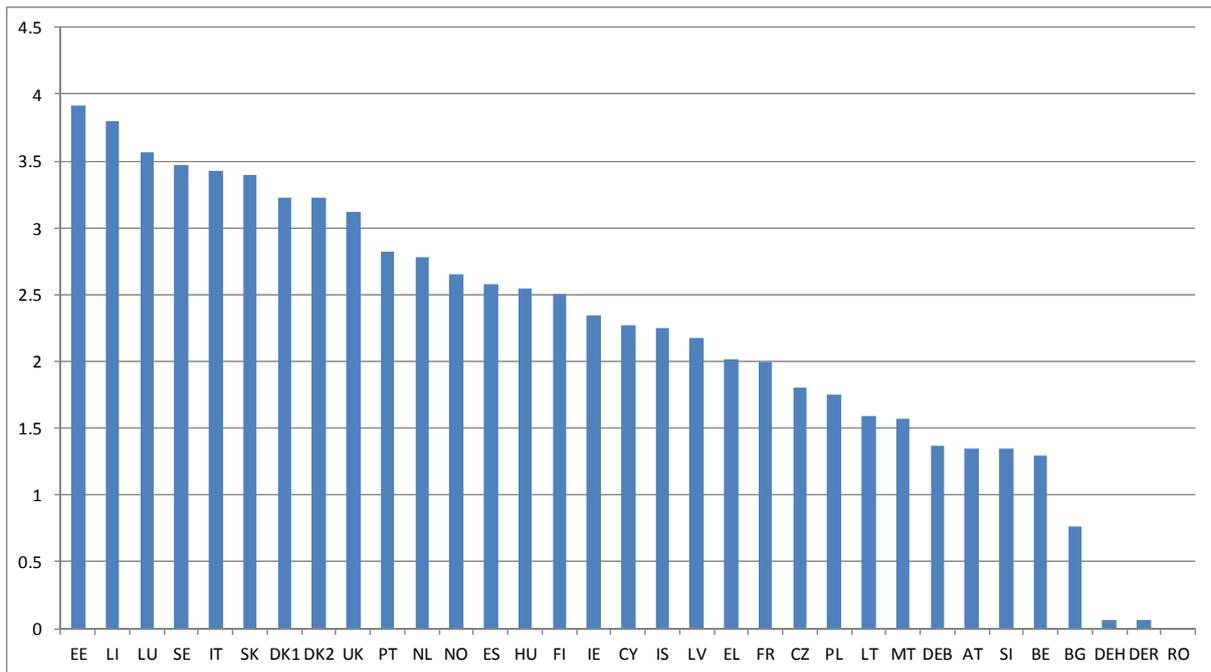


Figure 19 – Overall availability and sophistication benchmark

When looking at the overall availability and sophistication benchmark which only contains what is within the scope of the services directory (i.e. if we exclude taxes and social services), the ranking changes somewhat and the scores are somewhat higher in general. With the tax and social services elements excluded, Liechtenstein is the highest ranked portal, followed by Iceland, Estonia, Sweden Slovakia, Norway and Italy. At the other end of the spectrum the bottom four remain the same, however, Latvia drops considerably in ranking from 10th place when taxes and social services are include to 5th place when they are not.

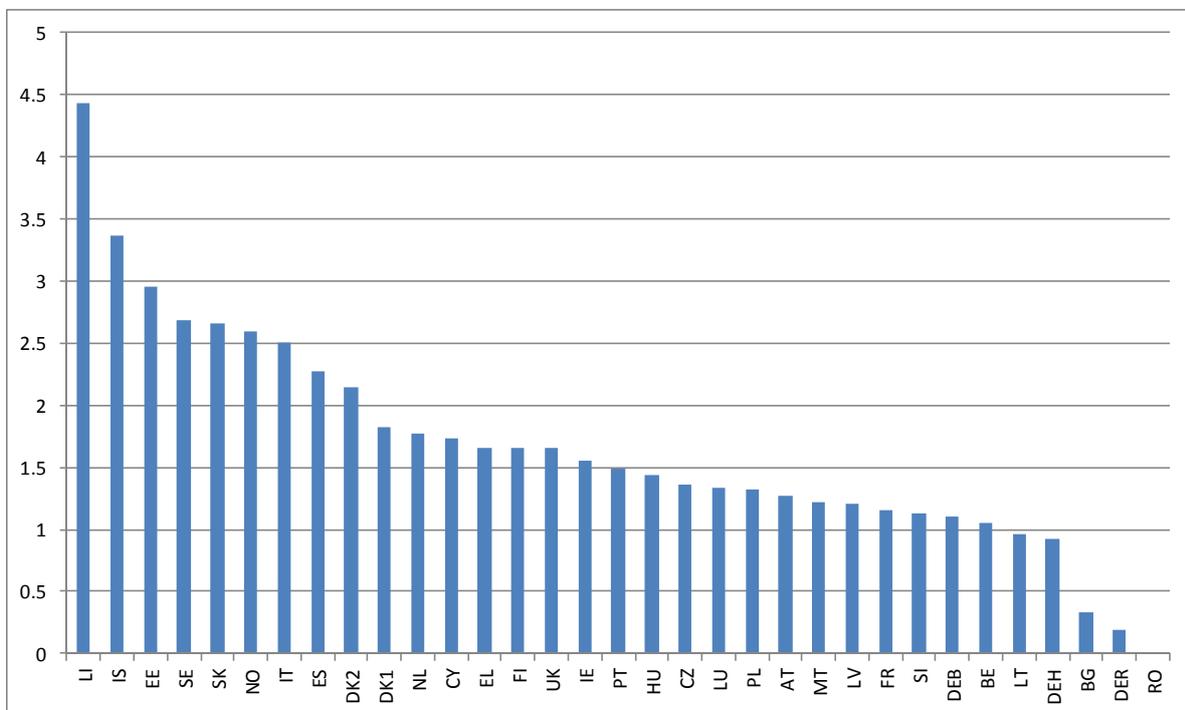


Figure 20 – availability and sophistication benchmark (excluding taxes and social services)

The results of the overall availability and sophistication benchmark in Figure 19, above, show that Estonia is the best performer, which is in line with the fact that Estonia is a country that is well

developed in the area of eGovernment services. Furthermore, the results show that smaller countries like Liechtenstein and Luxembourg are well developed, which may be due to implementation being possibly less demanding for smaller portal structures. Denmark, Slovakia, Sweden, and the United Kingdom are generally ahead of the curve regarding information and communication technologies, and their results are therefore in line with those countries' general tendencies. Italy has a very high availability and sophistication level, which is due the high prioritisation of its Point of Single Contact: the country aims to go beyond the requirements of the Services Directive both in terms of procedures and economic activities.

Here the method used to calculate this overall indicator, which is based on both availability and sophistication, is explained.

Availability is calculated as the percentage of procedures that are "not missing", i.e., are served either by the portal or by the websites of the relevant competent authorities. The result is given by the number of missing procedures in the country (the percentage value). The best value is thus 1, or 100% (i.e., all procedures are offered). The level of sophistication (such as one-way transaction or two-way transaction) is not taken into consideration.

Sophistication is calculated as a weighted average of the procedures offered (either at the portal or on the sites of the relevant competent authorities) by level of sophistication. The four levels of online sophistication are weighted progressively: the information-only stage has a weight of 1; one-way interaction is weighted 2; two-way interaction 3; and full case-handling is 4. The percentage of procedures served at each level of sophistication is multiplied by the percentage of procedures supported at that level of sophistication; i.e.,

$1 * (\text{Number of procedures at information only}) + 2 * (\text{Number of procedures at one-way interaction}) + 3 * (\text{Number of procedures at two-way interaction}) + 4 * (\text{Number of procedures at sophistication only})$. The maximum possible level is equal to 4.

The two elements are then summed up, and the availability element is divided by 2.

The combination of the two elements can give 4.5 as the maximum possible value, as a result of the following best achievable scores:

$1 (3. 100\% \text{ of procedures served}) / 2 + 4 (i.e. 100\% \text{ of procedures served as full case-handling}) = 0.5 + 4 = 4.5$.

Clearly, all the eight types of administrative requirements in the study have been included in the elaboration of the index, i.e., company registration, general business licence, sector-specific: person, tax-related formalities, social security formalities, premises of the provider, operations and locations and cross-border procedures. In addition, data about their availability and level of sophistication came from elaborations of Table 6 of the country reports. This table collects information about the level of sophistication of the procedures required for each of the eight types of administrative requirements listed above for the six scenarios tested (i.e. architecture, food and catering, travel agent and tour guide, both for establishment and temporary cross-border service provision)¹⁹. Therefore, the availability and sophistication index includes the assessment of cross-border availability.

2.4 Use and usability of Point of Single Contact services

One of the objectives of the assessment of the Points of Single Contact was to test their practical functioning from the side of the end-user, i.e., the business perspective. To this end, each portal was tested by two different focus groups: one set up within each Member State and one from abroad. For each service sector tested, participants were asked to complete both an "establishment" scenario and a scenario of "cross-border temporary service provision".

More than 200 people with day-to-day business experience in the three service sectors of architecture, food, and travel were recruited to participate in these focus groups. Likert scale analysis to examine

¹⁹ See also explanation of focus groups' methodology and activities.

usability and user satisfaction was undertaken by participants with regard to more than 1,000 enquiries on the Point of Single Contact portals.²⁰

Usability is an unstructured term that essentially means "able or fit to be used". This study examined usability in four different ways: efficiency and effectiveness; user satisfaction; re-use; and eAccessibility. Each is defined as follows:

Efficiency and effectiveness – System Usability Scale (SUS) methods examined users' experience when using the portals.

User satisfaction – The Analysis of Web Application Requirements (AWARE) method examined user satisfaction.

Re-use – A traditional method for measuring use and usability is customer loyalty. This study developed methods to examine the likelihood of reuse of portals as a surrogate for customer loyalty.

eAccessibility – Evaluation tools were used to examine the extent to which the portal was accessible by people of all abilities and disabilities.

This sub-section first covers issues with regard to task completion and user satisfaction. It then provides details about the results relating to the four measures for usability. It concludes with a composite usability index derived from the four components. Finally, it provides an overview of portal positioning and awareness.

2.4.1 Task completion – ease of identifying the right procedures and completing them online

The focus group participants explored the degree to which particular tasks could be completed in relation to the establishment of a business and providing a service cross-border. Each Point of Single Contact was tested by two user groups. One group was of attendees from within the Member State itself; and the other was from participants who were from abroad.

The extent to which end-users could complete the particular tasks involved, identifying the appropriate procedures involved and then completing them, differed substantially.

The tasks explored include the following help channels; eld/eSignatures for end-users who were not nationals of the particular country; multilingual assistance; navigation tools that identified relevant procedures; online payment tools; the structure and organisation of information; submission and storage of eDocuments and forms; the tracking of ongoing procedures; and translation of information/forms. All are identified in Figure 21. A number of important observations can be drawn from this exercise.

With regard to the error rates involved in completing these various tasks, the rates were:

- Generally higher for the "foreign" focus group users than for "domestic" users (i.e., users from the same country).

This finding indicates that it is generally easier for users who are more familiar with the country's administrative or legal environment to identify the required procedures correctly.

- Higher when working on tasks that were concerned with the cross-border scenarios than with the establishment scenarios.

This finding suggests that there may be problems with the way in which information is presented on most Points of Single Contact with regard to cross-border service provision which can render it difficult to identify relevant procedures.

²⁰ As background, in 2010, the 9th eGovernment Benchmarking methodology noted that user experience would be added as a metric for benchmarking. Local independent web researchers evaluated 20 eGovernment services using "mostly binary (yes/no) research questions.

- Higher for certain service sectors than others (e.g., the errors in the restaurant/catering scenario were higher than in the tourism scenario).
- Higher for certain groups of procedures.

There were particular Member States which had good task completion rates in terms of the establishment scenario and the cross-border scenario. The six highest in each case are listed below. For the establishment scenarios, those countries' portals are indicated where 70% or above of the procedures were correctly identified. For the cross-border scenarios those Member States are listed where there was 50 per cent (or above) of correct identification.

- Good completion rates for establishment scenarios (in alphabetic order): Cyprus, Brandenburg Land - Germany, Iceland, Liechtenstein, Spain, and Sweden.
- Good completion rates for cross-border scenarios (in alphabetic order): Belgium, Estonia, Ireland, Lithuania, Malta, and Norway.

The figure below indicates that the focus group participants can be classified roughly into three groups: in 32% of Points of Single Contact participants completed the tasks very easily or easily; 31% found it alright/OK; whereas 37% of participants found it difficult or indeed very difficult. A higher percentage overall were generally able to complete the tasks with ease than with difficulty.

The degree to which particular tasks could be completed was explored by the focus group participants. In the two types of scenarios described – those of the establishment of a business and of a cross-border service provision scenario – the extent to which end-users could complete the particular tasks involved, identifying the appropriate procedures involved and then completing them, differed substantially.

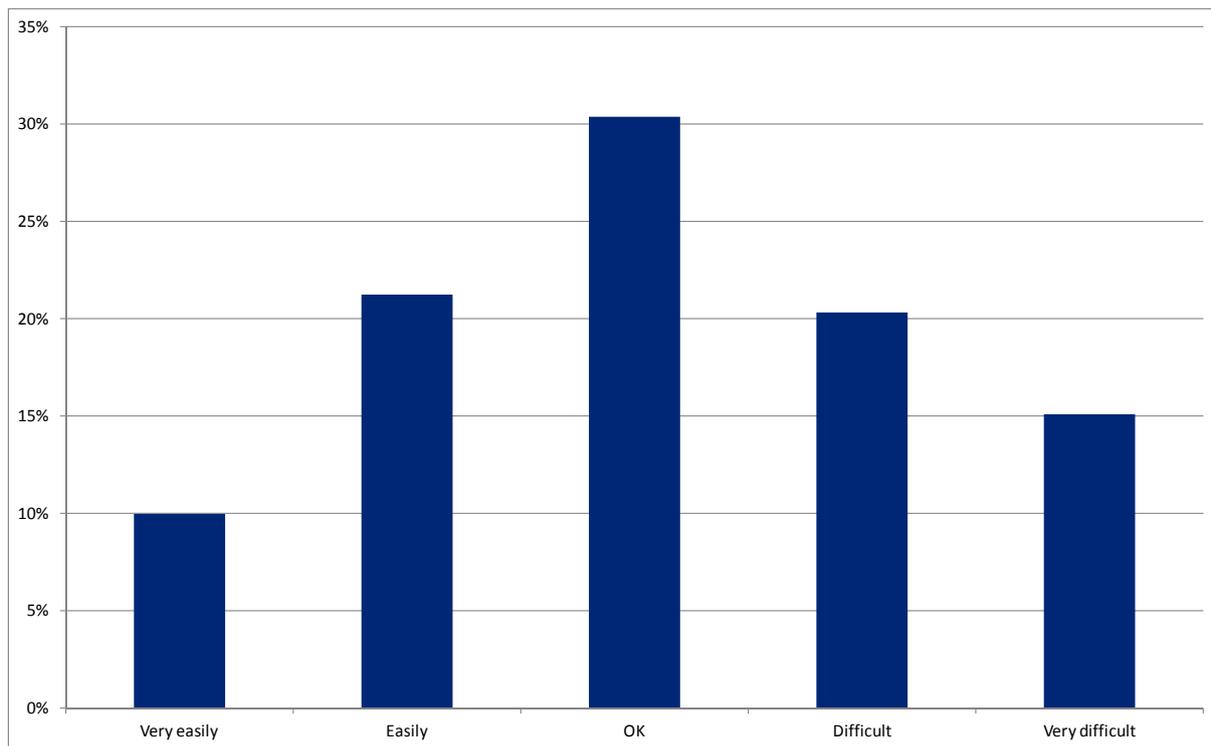


Figure 21 – Overall Percentages of Ease of completing procedures through the Point of Single Contact

Figure 22 below illustrates the ease of completing administrative requirements. Figure 23 then identifies the eight types of administrative requirements which were explored by the focus group participants, and the extent to which they found them easy on average to complete or not.

Procedures related to general business licence are found to be easier to complete (56% of the focus group participants found them easy or very easy to complete), while procedures relating to premises of the provider and operations and locations were found to be more difficult to complete (none of the focus group participants found them “very easy” to complete, and only 14% and 17% respectively

found them “easy”). This result is consistent with the fact that in many countries administrative provisions concerning those types of administrative requirements are determined by local authorities. Therefore, they tend to be heterogeneous, and provided on different websites, which often do not have the same “look and feel” as the main portals, or the same level or linguistic support (hence, there are differences between the Point of Single Contact portals and the websites of national competent authorities). Clearly, these characteristics may disorient users, and make the completion of tasks quite difficult and time-consuming for them.

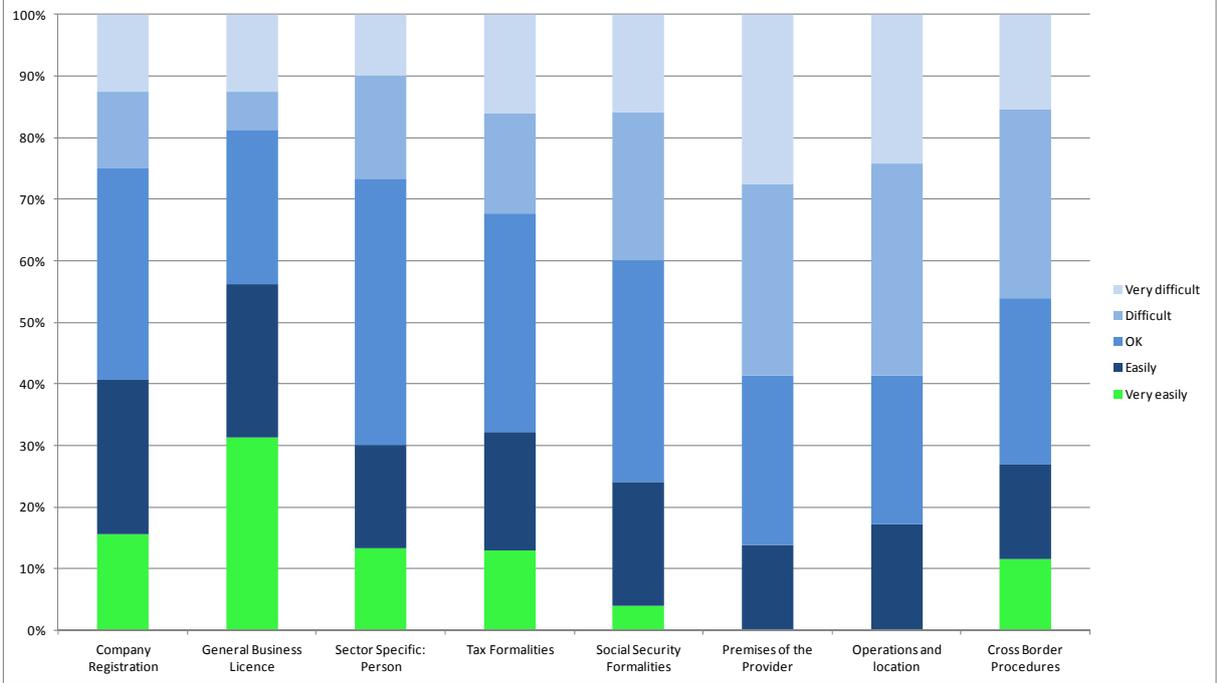


Figure 22 – Overall ease of completing procedures through the Point of Single Contact per type of administrative requirement

When considering the results of the focus group assessment of the overall ease of completing procedures by Member States, results again show notable variations, as Figure 22 shows.

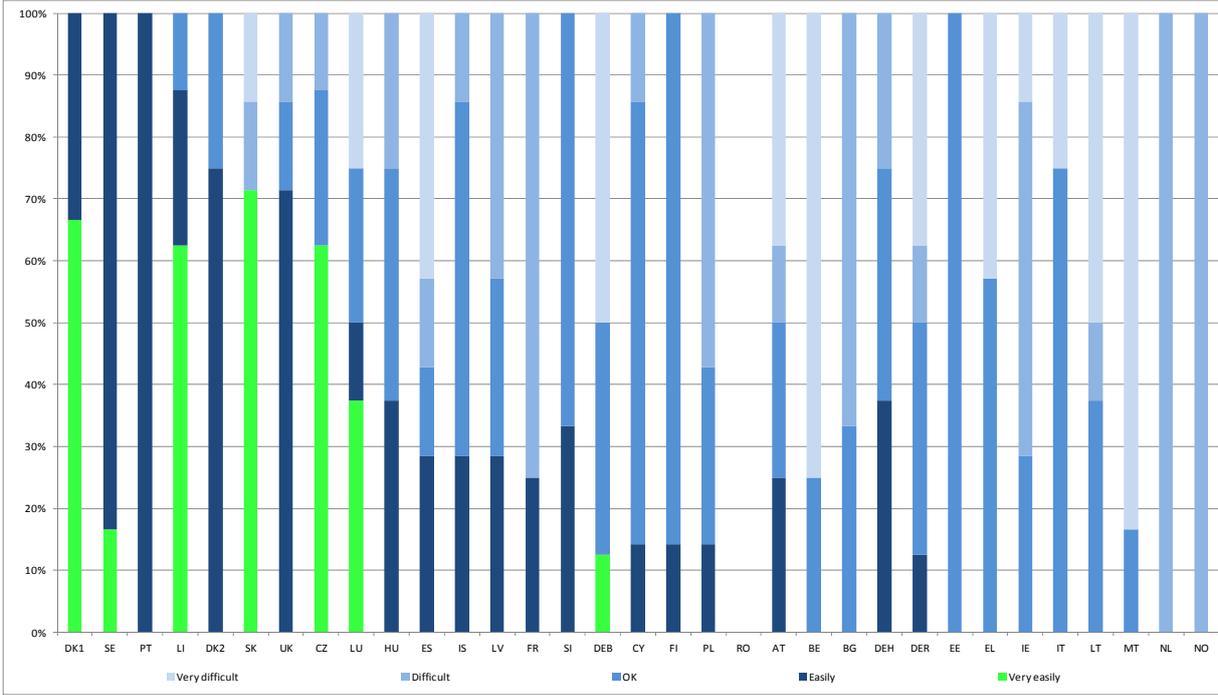


Figure 23 – Overall ease of completing procedures through the Point of Single Contact per Member State

Note: This figure should be considered as reading broadly, if not precisely, from "easiest" to "most difficult" from left to right.

The five Member States in which there appear to have been the greatest ease of completion of procedures were, in alphabetic order, the Czech Republic, Denmark, Lithuania, Slovakia, and Luxembourg.

2.4.2 Four measures of usability

Efficiency and effectiveness were measured using the System Usability Scale (SUS). Focus group participants in each country completed a short questionnaire after examining various parts of Point of Single Contact portals that provided information or services.

The questionnaire included ten attitudinal SUS statements (that were measured on a Likert scale) which give an overall view of subjective assessments of usability (Brooke, 1996). Each statement was given a rating on a five-point scale of "Strongly Disagree" to "Strongly Agree" by participants. The questions examined three dimensions: first, effectiveness (whether users can successfully achieve their objectives), second, efficiency (how much effort and resource is expended in achieving those objectives) and finally, satisfaction (whether the experience was satisfactory). The ten SUS statements used were:

- I would like to use the POINT OF SINGLE CONTACT website frequently for my needs;
- I found the website unnecessarily complex;
- I thought the website was easy to use;
- I think that I would need the support of a technical person to be able to use the website;
- I found the various functions in the website were well integrated;
- I thought there was too much inconsistency in the website;
- I would imagine that most people would learn to use the website very quickly;
- I found the website very cumbersome to use;
- I felt very confident using the website;
- I needed to learn a lot of things before I could get going with the website.

Participants completed more than 1,000 questionnaires (comprised of the ten SUS statements) after undertaking activities on the portal. Results for the ten SUS questions were coded into a scoring system according to the degree of agreement or disagreement with the above SUS statements. The scoring system allocated a score of '5' for strong agreement and '1' for strong disagreement with each of the ten SUS statements. The average 'score' for each participant for the ten statements was then calculated. In each country participant average scores were used to calculate an average SUS score for the country. This score then represented the country's performance for the SUS efficiency and effectiveness methodology. The country scores were then ranked for all the countries that took part in this part of the study. Figure 24 below shows the ranking derived from these scores.

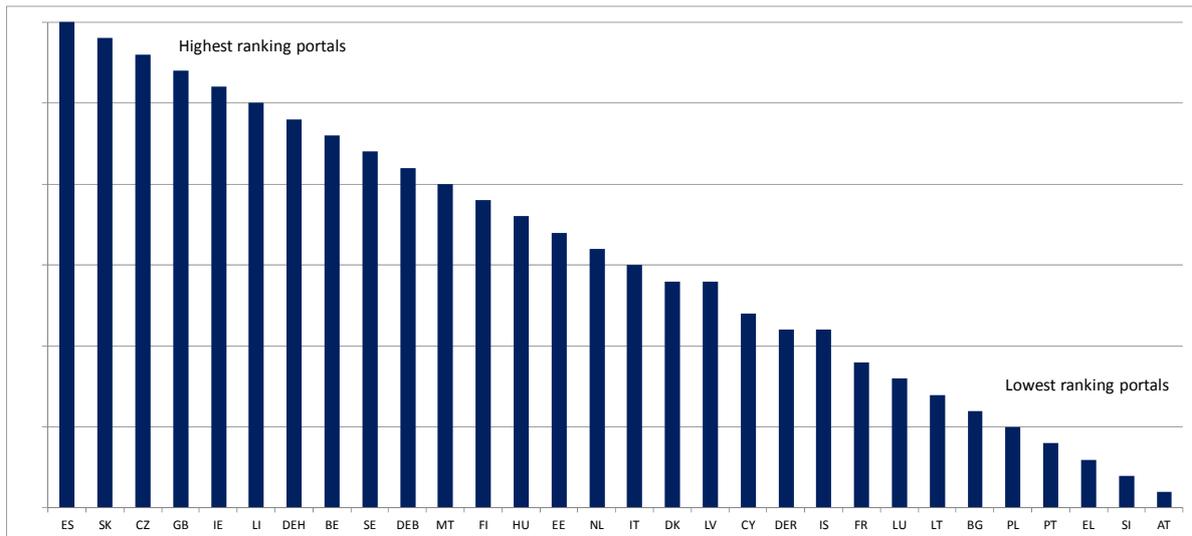


Figure 24 – Portal efficiency and effectiveness according to SUS rankings

There does not appear to any correlation between the SUS ranking and how and when the portals were developed. Among the five highest ranking portals, three were built on existing portals and two were new. The same distribution of new and existing portals was observed among the lowest ranking portals. With one exception, in each group the highest and lowest ranking portals went live on or around December 2009. One of the lowest ranking portals was still under user testing (prior to going live) and the Slovakian portal (one of the highest ranked) is due to go live in early 2012. Neither previous portal development experience nor the length of time since development seem to influence portal ranking for efficiency and effectiveness.

User satisfaction was measured using the AWARE (Analysis of Web Application Requirements) methodology. AWARE examines goal-driven satisfaction when users are attempting to complete a particular task. Like the SUS methodology, AWARE examines eight portal characteristics that require each participant to provide a subjective assessment using a five-point scale of “Strongly Disagree” to “Strongly Agree”. The user satisfaction characteristics examined were:

- Access;
- Content;
- Interaction;
- Navigation;
- Presentation;
- Structure;
- System operation;
- User operation.

User satisfaction results using the AWARE methodology can be seen in Figure 25 below.

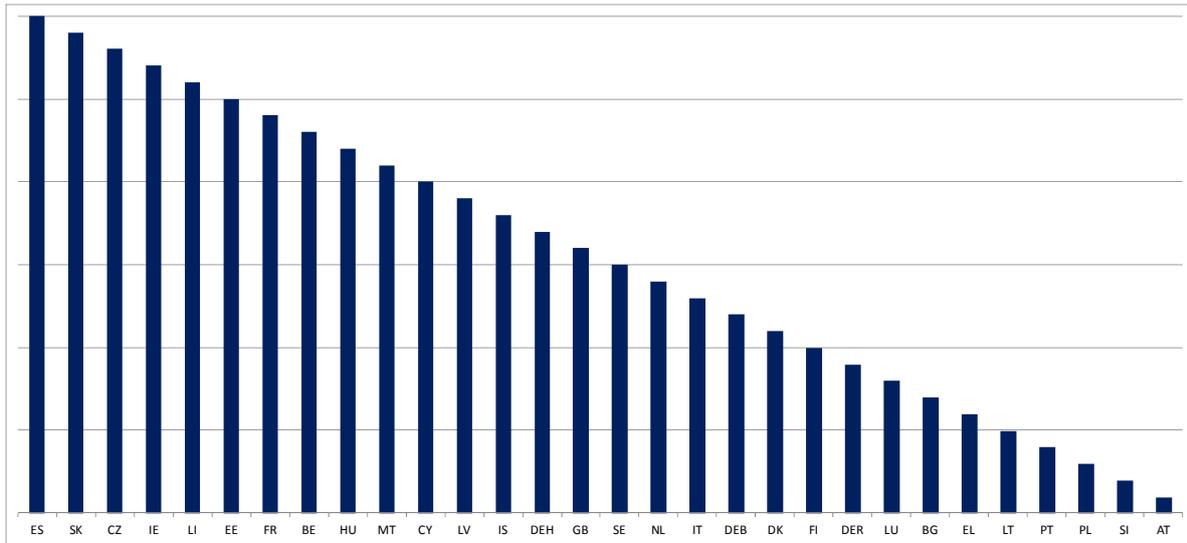


Figure 25 – User satisfaction using the AWARE ranking

There is a relatively high degree of correlation in the rankings for both users' satisfaction and efficiency and effectiveness²¹. Seventeen countries have rankings for both aspects that are within +/- two places. The largest deviations from this general alignment are for France's Point of Single Contact, which is highly placed for user satisfaction but which is ranked 15 places lower for efficiency and effectiveness. Conversely, the United Kingdom's Point of Single Contact is highly placed for efficiency and effectiveness, but ranked 11 places lower for user satisfaction.

An important measure of use and usability is customer loyalty (Hayes, 2008). Loyal customers should visit a website often or use services at a website often. eGovernment portals are akin to monopoly suppliers of services and information about regulatory requirements. It was therefore necessary to develop a surrogate measure for customer loyalty, since users often have no other sources for these services or information. The surrogate measure was generated by analysing the change in focus group participants' views about the assistance provided by the website and their propensity to revisit the Point of Single Contact. In essence, the study examined how likely participants were to re-use the portal. Re-use was examined by seeking the views of focus group participants, using a Likert scale, about three statements. These three statements were:

- Government assistance to help start small businesses will be very good.
- I would prefer to go online to obtain help and advice about starting in business.
- Ranking for online government media (against seven other methods) as a source for government business assistance.

These three statements were assessed when participants first arrived at the focus group session and again at the end of the session after they had completed a number of practical exercises using the portal. For each participant, both a before and after analysis was used as a method of measuring likelihood of re-use. Re-use results can be seen in Figure 26 below.

Whereas the two usability factors (efficiency and user satisfaction) were relatively closely correlated, there is little correlation between the items of re-use and user satisfaction²². The most extreme examples of the lack of alignment between re-use and user satisfaction are for the Point of Single Contact in Luxembourg, which is highly ranked for re-use, but ranked relatively lowly for user satisfaction. Conversely, Lithuania is ranked highly for user satisfaction but receives a low ranking for re-use.

²¹ Correlation coefficient 0.81.
²² Correlation coefficient 0.32.

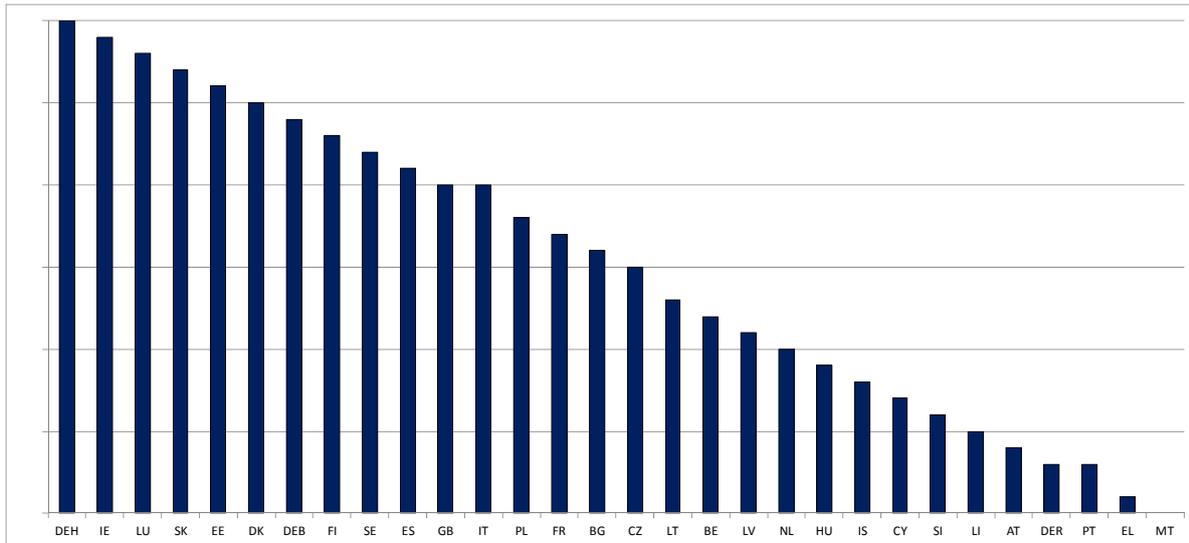


Figure 26 – Propensity for portal re-use

2.4.3 Portal accessibility

According to the World Wide Web Consortium (W3C), “Web accessibility means that people with disabilities can use the Web. More specifically, Web accessibility means that people with disabilities can perceive, understand, navigate, and interact with the Web, and that they can contribute to the Web. Web accessibility also benefits others, including older people with changing abilities due to aging”²³.

Many European governments are making strong efforts to ensure that their public sector portals comply with common accessibility standards, and European policy is supportive of such an approach and may progress further in this direction in the future. eAccessibility is an important measure of usability. The accessibility of portals was analysed using several accessibility tools. The two used in providing an eAccessibility index are the:

- W3C Markup Validator²⁴. This validator assesses the html markup used on the website and states whether any errors have occurred.
- W3C CSS Validator²⁵. This validator measures the degree to which websites adhere to web standards as regards cascading style sheets. Cascading style sheets errors mean that information on the website does not display correctly or at all.

Compliance with web accessibility standards was mixed. Bulgaria, the Czech Republic, Estonia, France, Ireland, and the Netherlands recorded fewer than two errors (in total for both validation methods) at the time of testing. Eleven portals recorded more than 100 errors for one or other of the two validation techniques.

eAccessibility results for the portals studied are provided below in Figure 27.

²³ <http://www.w3.org/WAI/intro/accessibility.php> Copyright © [2010/07/07] World Wide Web Consortium, (Massachusetts Institute of Technology, European Research Consortium for Informatics and Mathematics, Keio University). All Rights Reserved. <http://www.w3.org/Consortium/Legal/2002/copyright-documents-20021231>"

²⁴ <http://validator.w3.org/>

²⁵ <http://jigsaw.w3.org/css-validator/>

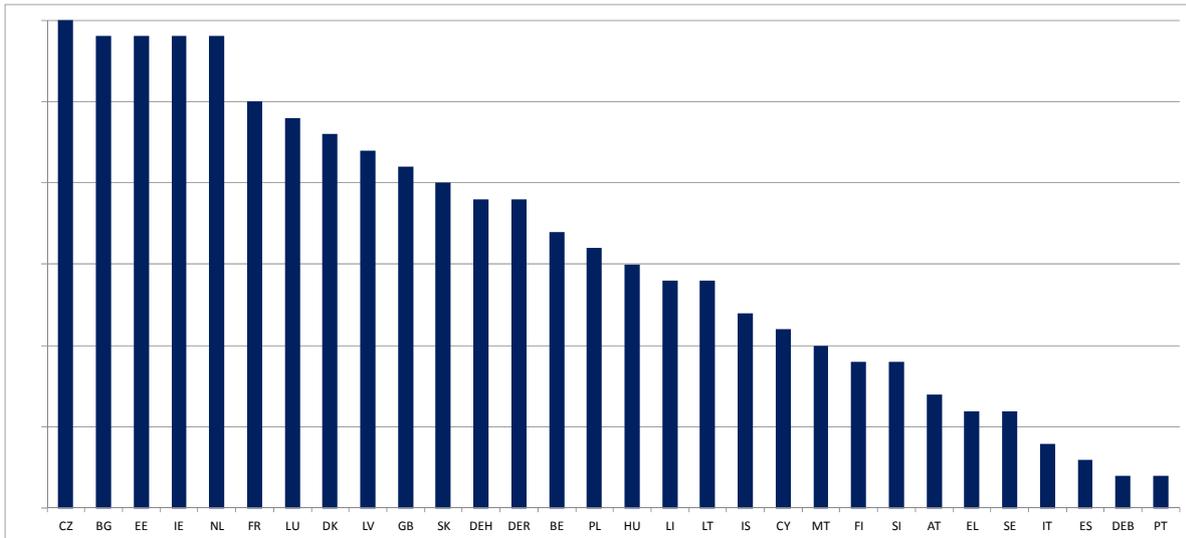


Figure 27 – Point of Single Contact eAccessibility

2.4.4 A composite usability index

The factors described in the preceding sub-sections provide a thorough investigation of four key dimensions that are key for usability: efficiency/effectiveness, user satisfaction, re-use and eAccessibility.

A composite index for usability was generated by combining the rankings for each of the Member States studied against the four measures. The composite index is shown in Figure 28.

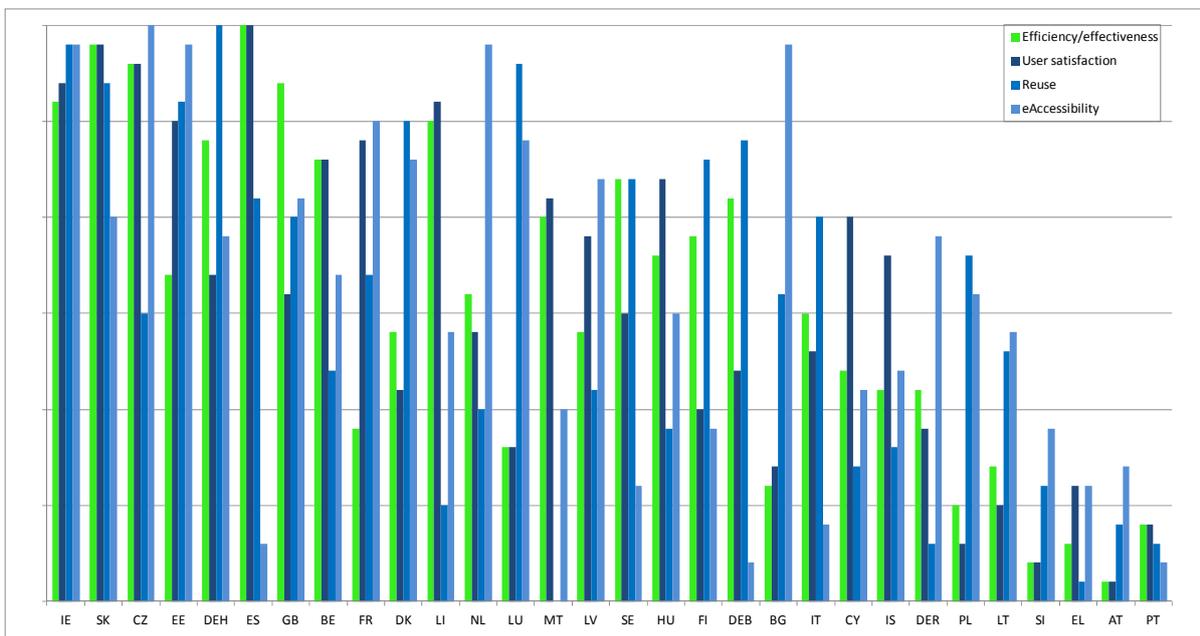


Figure 28 – Composite Usability index

In general, there is a relatively high degree of correlation between all four factors of the composite usability index. Points of Single Contact that perform well against one of the four factors tend to be ranked at a similar level across all four factors. There is a relatively high level of correlation between the User Satisfaction measure and the overall composite index (correlation 0.81).

2.4.5 Take-up, positioning and promotion

None of the portals included in the study carried out promotion and awareness campaigns for the launch of the Point of Single Contact portals. In general, the level of funding was not sufficient to allow for both the technical development of the portal and any marketing and promotion campaigns. Efforts were therefore focused on the technical developments. For further information on this, see sub-section 2.5.1 and 2.5.3.

Indeed, the awareness of both businesses' and the general public awareness of the Point of Single Contact portals was low in all the Member States. According to the majority of stakeholders interviewed, awareness and promotion campaigns would be needed in order to improve the degree of recognition of the Point of Single portals, as well as volumes of use. This would in turn help to achieve the desired economies of scale, and to justify additional funding for further developments of the portals.

Only 30% of the focus group participants were aware of the Point of Single Contact prior to contributing to the focus group meeting and there are no significant differences in the awareness between the different Member States. On the contrary all the Points of Single Contact are perceived as official portal sites backed by the government. Furthermore, this is reinforced by the presence of the EUGO logo on all of the Points of Single Contact. All the EUGO logos link to the EUGO site, where links can be found to all Member State portals. However, no portals contained direct links to other Member State portals.

The search engine ranking of the Points of Single Contact were poor in over half of the countries, but good in Denmark, Luxembourg, Malta, Portugal, and the United Kingdom. In general, the term "Point of Single Contact" yielded the best result for most portals for both search engines. However, other terms, such as "One-stop shop" and "e-government for business" did not rank well. In most cases, when searched for, they were to be found beyond the 50th ranked site.

Since none of the Points of Single Contact have run an awareness campaigns when launching their portals, this may be a reason for the low awareness. In turn, this may have contributed to the poor search engine results since the sites have therefore not had many visitors (which is a taken into consideration in ranking by some search engines). However, some portals are planning to carry out awareness campaigns in the future.

2.5 Organisation and back office enablers

This section on back office enablers focuses on the more technical and procedural aspects of the portal. Three components or building blocks are assessed and compared, namely:

- Back office integration and cooperation with competent authorities;
- Resources and finances;
- Policies concerning key technical enablers (for all discussions of technical enablers, see the discussion which takes place in sub-sections 2.3.3.3 and 2.3.5.3. Technical enablers are of course a critical backbone to the functioning of the Points of Single Contact, particularly in terms of any cross-border element.

In doing so, major gaps are identified and best practices mentioned. Any future developments already foreseen in Member States are also presented.

2.5.1 Back office integration and cooperation with competent authorities

In this sub-section, the following issues are examined: the role of the Points of Single Contact (i.e., coordinated information or acting as a mere gateway towards the websites of the relevant competent authorities), back office integration in the different Member States, and mechanisms implemented in order to ensure that information on Points of Single Contact is reliable and up-to-date. Analysis extracted from the various country reports is brought together here.

The overwhelming majority (i.e., 28, or 85% of the total) of the Points of Single Contact that were examined are designed to act as a gateway or signpost towards the websites of competent authorities where the different online procedures are then supported. The Points of Single Contact of Cyprus, Finland, France, and Germany (the *Land* of Rhineland-Palatinate) are designed not only to give access to the relevant information but also to offer the different online procedures. A limited number of

Member States have given their Point of Single Contact portal a mixed role: i.e., they act both as the main gateway to the websites of competent authorities, but they also offer a part of the procedures relevant for the Services Directive. The portals of Germany (the *Land* of Brandenburg), Greece, Luxembourg, Norway and Portugal can be included in this group. The extent to which these "mixed portal" types cover the two different roles varies, as do the types of procedures offered directly on the Points of Single Contact. For instance, in Greece, licencing procedures are mainly supported, while in other cases company registration is possible (as in the case of the *Land* of Brandenburg - Germany and Luxembourg).

Similarly, the number and type of competent authorities with which an end-user of a Point of Single Contact has to liaise vary greatly. The number ranges from 19 in Malta to more than 8,000 in Spain. The competent authorities involved include national ministries and agencies, regions, provinces and municipalities, as well as professional organisations. Great variety is also evident in terms of the type of competent authorities included. The number of national ministries involved ranges from only one in Italy to 28 in Cyprus. The number of government agencies that the Points of Single Contact have to coordinate with varies from 139 in Spain to three in Italy. Similar variation is evident in the number of regional authorities and municipalities with which users of Points of Single Contact have to liaise. In the case of regional authorities, it varies from only one in Norway to more than 2,400 in Poland. For municipalities, it ranges from 47 in Estonia to more than 8,000 in Spain. The number and role of professional organisations also varies: their number ranges from four in Bulgaria to more than 300 in France – their role is in general, however, quite relevant, especially for the architecture scenario examined in this study, and for the regulated professions more generally. In addition, the Chambers of Commerce play a key role in many Member States, either because they are directly involved in the set-up and management of the Point of Single Contact (as is the case in both France and Italy) or because they are responsible for some of the services covered by the Directive (as is the case in terms of Austria, Belgium, and Poland).

These figures depend mainly on the size and institutional organisation of each Member State, as well as on how the various competences are classified among the different administrative layers and authorities. In general, Member States with a highly decentralised administrative structure have a very high number of different competent authorities with which the Point of Single Contact has to liaise (as is the case for Spain).

The analysis undertaken in the study highlighted that coordination among the different competent authorities has not been always simple. In about a dozen cases (such as in Greece, Slovakia and Slovenia), competent authorities have been quite reluctant to cooperate with the Point of Single Contact. Other authorities considered the Point of Single Contact as a threat to their role and competences and, in some cases, those disagreements have not yet been completely resolved. In Greece, for instance, recognition of professional qualifications (which is relevant not only for the architecture scenario but also for all regulated professions) lies in the area of competence of the Ministry of Education, which runs a separate information system that is not integrated with the services offered by the Point of Single Contact.

In general, Point of Single Contact staff and eGovernment experts interviewed reported that cooperation is more difficult with municipalities and lower level of administration and for procedures regarding operations and locations.

Fewer than half of the portals included in the study (14, or 42%) have a formal remit vis-à-vis the competent authorities to request their cooperation. In those cases cited, competent authorities have the legal obligation to provide the Point of Single Contact staff with updated information about changes in regulations and/or procedures (as in the cases of Denmark, the *Land* of Hesse - Germany, Hungary and Italy). In some cases, legal arrangements are in place to ensure that information published on the Point of Single Contact is reliable and up-to-date. For instance, in Cyprus, the Point of Single Contact staff updates the descriptions of procedures based on the data provided by the competent authorities (which are responsible for providing updates). In Luxembourg, several mechanisms are in place: external and internal monitoring of legislation, an alert mechanism when new legislation is launched, modification of web content on the application of law, audits, publications related to directives, and "global writing governance" is in development. In Malta, 19 separate Service Level Agreements have been implemented with the relevant ministries and competent organisations.

The remaining 18 portals included in the study (i.e., 55% of the total number) do not have a formal remit with regard to the competent authorities. In a limited number of cases, however, administrative arrangements are in place to ensure updating and reliability of information. In Germany (in the *Land* of

Brandenburg), the content is reviewed and then approved locally by the relevant competent authority and additionally by Point of Single Contact staff (including legal experts) on an annual basis before the information is posted on the site. In Finland, smooth cooperation remains on a practical level. Generally competent authorities respond actively to requests, and see it as being in their own interest to provide input to the Point of Single Contact. However, the fact that Points of Single Contact are still relatively new means that the Point of Single Contact staff members often need to clarify the purpose and needs of the portal to the competent authorities. In Slovakia, Point of Single Contact staff follow legislative changes and updates information accordingly. The institutions involved inform Point of Single Contact staff of any changes that might be of importance to the portal.

Internal tracking systems have been implemented by a limited number of the portals involved in the study (such as Cyprus and Slovakia), while other portals have mechanisms to ensure that queries directed to the wrong authorities are redirected to the correct authority and are processed (e.g., Luxembourg).

Systems that deal with linkage errors can be classified in four groups:

- end-users can contact the Point of Single Contact staff through the portal to notify an error;
- competent authorities can identify errors and inform the Point of Single Contact staff;
- Point of Single Contact staff can encounter errors during the periodical review of web pages and other day-to-day activities;
- automatic tools (crawlers and applications scanning the links) are used.

While the first three systems are quite common, the fourth system (which consists of an automated process) is less widespread. Only six of the portals included in the study reported that they had implemented such a system.

In general, the majority of the portals involved in the study reported a medium to good level of cooperation with the competent authorities. Similarly, the level of back office integration was reported to be medium to good, thanks at least in part to the information technology infrastructures implemented in Member States for several years already (such as a Service-Oriented Architecture in Cyprus, X-Road in Estonia, the Central Electronic Service System in Hungary, ePuap in Poland, and CIRCE in Spain). Nevertheless, some countries mentioned specific difficulties in cooperating with competent authorities (the Ministry of Education in Greece, for instance, or the many municipalities and professional organisations in several Member States). Some countries are issuing new regulations to ensure and/or improve cooperation among different authorities and administrative layers (as in the cases of Bulgaria and Slovakia). Other countries (such as Luxembourg and the United Kingdom, among others) have organised a liaison period of several months between the Point of Single Contact staff and the competent authorities. The Point of Single Contact staff interviewed reported that these time-periods had proved to be useful in streamlining cooperation among the different authorities and in better defining competences.

2.5.2 Resources and finances

In this sub-section, the human and financial resources used by Member States to implement the Points of Single Contact portals included in the study were analysed.

As far as human resources are concerned, Point of Single Contact portals are managed by a variable number of staff, ranging from two only (in the cases of the Czech Republic, Latvia, and Liechtenstein) to almost 40 in Poland (including both technical and editorial staff). The average number of staff members is between 18 and 19 full-time staff equivalents.

Development and maintenance costs also vary across countries. This variation depends on the different structures and ambitions of the Points of Single Contact. Some Member States – such as Italy – intended to build and run websites that go beyond the minimum requirements of the Services Directive, while others only decided to create portals that met the minimum requirements – as was the case in Ireland. Differences in the reported costs depend on those items which have been included in Point of Single Contact-related costs: many countries did not include the costs for the staff members which manage the site (or included only part of these staff costs), as the Point of Single Contact is formally part of another structure, such as a Ministry or an agency, whose costs cannot easily be separated by those of the whole organisation.

In general, the Point of Single Contact staff who were interviewed reported that the portals have a sufficient level of funding, at least to ensure the current level of functioning. Further developments may prove complex to implement, however, without additional financing in some cases – one option here might be the marketing or branding of the Points of Single Contact. There is also a common anxiety that austerity cuts associated with the current economic scenario could hamper or delay future improvements. Funding usually comes from national Ministries and/or agencies, as none of the portals analysed charge fees for its use or plans to do so in the future. When fees are charged to end-users, these are required by the administrative procedures on offer. Only in a limited number of cases do the funds for the Point of Single Contact portals come totally or in part from EU programmes, as occurred in the two cases of Estonia and Romania. In Estonia, EU structural funds finance the programme for the Information Society which also includes the funding for the Point of Single Contact.

2.5.3 Future plans – outlook

In this sub-section, an outlook of the plans for future developments of the Points of Single Contact included in the study is presented.

As highlighted at the outset of the report, the Points of Single Contact are under continual development, as Member States expand and improve progressively the services they offer on their portals.

Almost all of the Points of Single Contact included in the study have strategic plans for future developments. The exceptions are, however, Belgium, Ireland, Slovakia, and the United Kingdom: the reasons in each country are quite different. In Belgium, the responsibilities for future plans and developments lies within the nine separate business counters, which makes it difficult to define a common strategy. In Ireland there is an ongoing debate about how to re-organise the whole eGovernment portal, which could then possibly also include the Point of Single Contact. The Slovakian website is about to be launched in 2012 (and, therefore, all efforts are focused on making it fully working and operational). In the United Kingdom, there is some possibility that conflicts might arise with the eGovernment strategy as defined by the new Digital Service Agenda.

About half of the Points of Single Contact analysed have undergone or are undergoing a major re-design of their websites. These enhancements encompass a wide range of changes, such as improved search functionalities, better language support, and simplified and more sophisticated online procedures. Examples of these improved portals are those in the Czech Republic, Denmark, Estonia, Finland, Greece, Luxembourg, Malta, Portugal, and Norway.

A major example of a revamped website that was put online during the period of the study is the Portuguese Point of Single Contact. A revised version of the website, with additional functionalities, was implemented by the Portuguese government and a joint committee composed of members from the European Commission, the International Monetary Fund and the World Bank. A new Memorandum of Understanding among these four organisations, signed in December 2011, contains additional and more specific provisions for further developments of the Point of Single Contact website. Major changes in the Portuguese Point of Single Contact website are thus foreseen in the near future.

While the strategic plans are not always compelling, they have been elaborated in almost all Member States usually as part of a comprehensive national eGovernment strategy.

In general, the planned developments seem to move in various common directions, all of which are in line with a better and more complete implementation of the Services Directive.

Major directions for development that have been identified are:

- **Language support:** several plans include the development of websites in other languages, and/or improvements or content in other languages (such as the English language, but also the languages of neighbouring countries such as Russian content in Estonia and Spanish content in Portugal);
- **Availability of online procedures:** development efforts are directed towards making a higher number of procedures available, with full case-handling where possible. These start with those that are mandatory under the Services Directive, but include also additional procedures. These efforts are coupled with the simplification of administrative procedures and streamlining of administrative cooperation;

- **Technical developments:** technical improvements range from the implementation of content syndication tools to multi-channel support and life-event information systems;
- **Technical enablers:** support of integrated electronic payment systems when this is not yet provided, and implementation of technical solutions to support eIDs/eSignatures issued in other Member States.

However, awareness and promotion campaigns are included in the future plans of only two countries (namely, Finland and Malta). These campaigns will support the launch of the new Points of Single Contact national portals that are currently under development. It is hoped that the awareness and promotion campaigns, coupled with new and improved functionalities, will increase the number of visitors and the volume of use of these Points of Single Contact.

It is not clear whether the promotion campaigns will be carried out only at national level or will also be pursued on the European scale. In the first case, their effectiveness will probably be reduced, as the Points of Single Contact are intended to be the main access points for foreign businesses willing to provide services in the particular country.

On the other hand, a European-level campaign would help in reaching the anticipated volume of activities. In order to cope with foreseeable budget constraints, it could be possible to tailor an EU-wide promotion campaign to the relevant organisations such as chambers of commerce or sectoral organisations, in order to reach an appropriate multiplier effect.

2.6 A Composite Overall Indicator

Figure 29 below shows the overall ranking of the Member State Portals. This ranking is based on the following three composite indicators:

- Composite availability and sophistication (40)
- Overall usability (40)
- Technical enablers (20).

These three composite indicators were combined with the weighting indicated above (in parentheses next to each indicator). The weighting takes into account the importance of the indicators, relative to each other.

The first element of the indicator (i.e. composite availability and sophistication) was already presented and described in section 2.3.6. Similarly, the indicator for usability was illustrated in section 2.4.4, and is calculated as a simple average of the four elements presented in the section (i.e., portals efficiency and effectiveness, user satisfaction, propensity for portal re-use and eAccessibility of the Points of Single Contact portals). Finally, the indicator for technical enablers is, in turn, a composite indicator including the following three elements:

- Support of ePayments;
- Use of eIDs;
- Use of eSignatures.

In balancing the three elements, ePayments were given a slightly lower weight. More precisely, Point of Single Contact portals supporting ePayment were given one points, whereas Points of Single Contact not allowing ePayments were given a zero score. When considering eIDs, the scoring process reflected the solutions adopted for both foreign and national users. Portals were given one point if requiring an official eID for national users, and another point if they require and recognise foreign official eIDs²⁶. Therefore, portals supporting official eIDs for both national and foreign users received an higher score (i.e. two points, the maximum level achievable for this elements). The same approach was adopted for eSignatures. Portals supporting national qualified as well as foreign, qualified eSignatures were given the maximum possible score (two points). Therefore, higher scores were achieved by countries which support official eIDS and qualified eSignatures, both for national and foreign users (as well as allowing ePayments).

²⁶ Even if, as already explained, the number of foreign eIDs recognised is quite limited.

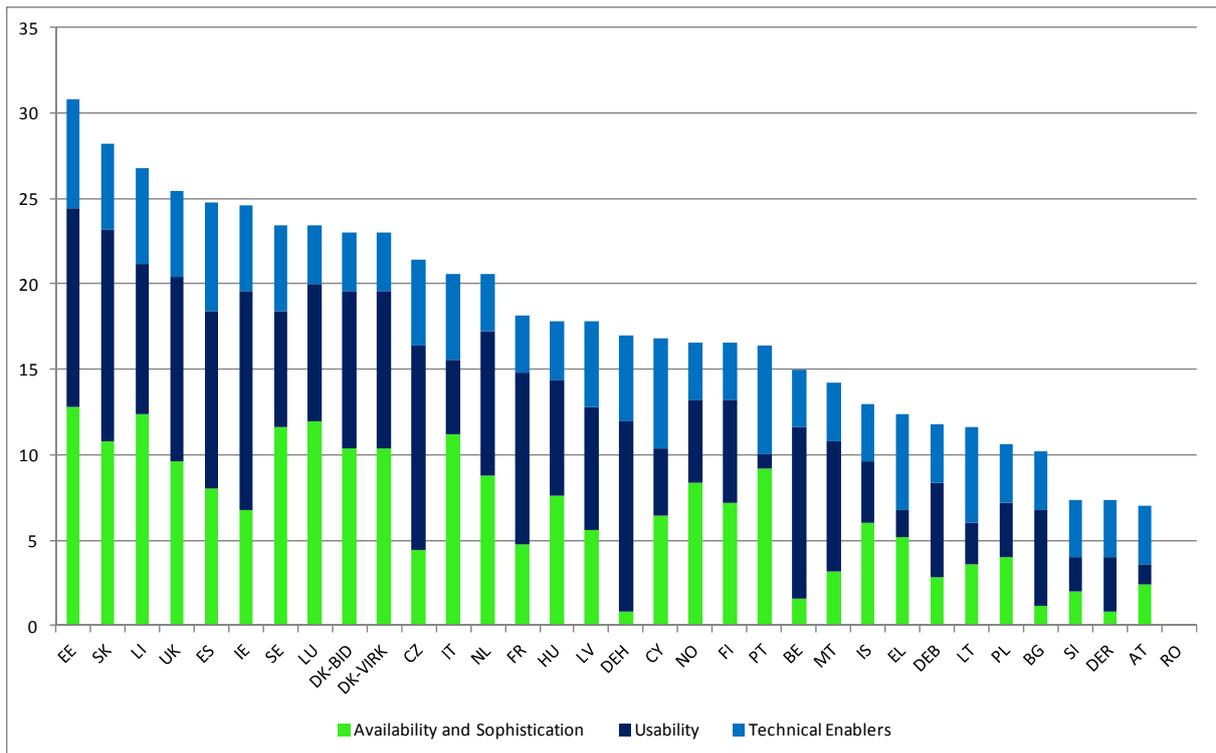


Figure 29 – Overall composite indicator – Ranking the Member States' Portals

The figure clearly shows a ranking of Member States, with Estonia being the highest ranked. It is followed by Slovakia, the United Kingdom, Liechtenstein, Spain, Ireland, Sweden, Luxembourg, Denmark (the two portals) and Czech Republic. There are major differences across the portals with regard to the strengths and weaknesses of each portal. For example, the Land of Hessen - Germany, has very low availability and sophistication, but has a very high usability and a relatively high level of technical enablers. On the other hand, portals like that of Portugal have very low usability, but relatively high availability and sophistication as well as technical enablers.

3 Conclusions

This chapter contains the final conclusions based on the study.

Gaps that need to be overcome in order to unleash the full potential of the Points of Single Contact, both in terms of technical barriers (mainly related to the use of eIdentity, eSignatures and eDocuments), but also legal, organisational and practical barriers are explored in the concluding sections of this report.

The Services Directive was adopted in 2006 to facilitate cross-border service provision and establishment abroad by simplifying existing procedures and removing legal and administrative barriers to trade in Europe's services sector. It stated that, by the end of 2009, each Member State would be obliged to set up a Point of Single Contact to serve service providers with all the necessary administrative procedures.

The Points of Single Contact were assessed based on a model consisting of three separate "domains": availability and quality of the services provided on the portals; use and usability of the portals; and back office enablers.

The study found that the only country where a Point of Single Contact was not yet online and no pilot was available at the time of the evaluation was Romania. Slovakia made a pilot portal available that was due to go live in January 2012. Although, at the time of the study, Slovenia did not yet provide access to the pilot of its Point of Single Contact, it did already have a portal offering eGovernment services for businesses that included a number of the general cross-sectoral procedures: it was these that were tested during the study. Slovenia is in the process of substantially changing this portal to comply with the obligations of the Services Directive and expects to go live with it in the course of 2012.

Several of the Points of Single Contact included in the study have already implemented changes since the time of the portal testing (in June and July 2011): in some cases, these were major modifications. These changes are not taken into account in the study's benchmark results. A prime example of a website that was revamped and brought online during the period of this study is the Portuguese Point of Single Contact.

An overwhelming majority (80%) of the Points of Single Contact examined are designed to be gateways or signposts towards the websites of the relevant competent authorities where the different online procedures are supported.

In 27 out of the 33 Points of Single Contact tested, existing government websites were used as the basis for their development. Several different approaches have been used: for example in Denmark, in parallel with an existing eGovernment website for business, a Point of Single Contact was developed that is dedicated to foreign businesses. In Iceland, the Point of Single Contact was built on an existing platform but a new portal site has since been developed and will soon be live.

The consistency between the Point of Single Contact, and linked websites, in terms of "look and feel" is not always optimal, however. Improvements in this domain will be one of the key enablers to enhance the end-user experience of the portals.

This alignment across linked websites entails a close collaboration with all the competent authorities. However, coordination among the different competent authorities has not always been simple. In some cases, the competent authorities have been quite reluctant to cooperate with the Point of Single Contact. Negotiated formal agreements between authorities could help to facilitate the cooperation needed.

The study also reveals that, although sound progress is reported in the two areas of simplification of procedures and authorisation schemes, and the dismantling of burdensome and unjustified

requirements on domestic and foreign services provision, the creation of the Points of Single Contact has in many cases not yet led to a simplification in administration in terms of business establishment.

Overall, the shift from a "paper world" to an "electronic world" is incomplete – Points of Single Contact fail to provide a tangible simplification benefit in a number of areas. In many countries, the reality is that there has been a direct translation of the complexity of the paper world into online processes (there has been little process re-engineering). In most cases, any supporting documents must be provided as certified paper copies, and requirements for originals were still identified in many cases.

The Points of Single Contact cover more or less all the different domains related to the start-up of a type of service provision or establishment. In fact, a considerable majority go beyond the mandatory requirements set out in the Services Directive – they also provide information on topics like tax and social security.

The evaluation shows that advice on legal structures, company registrations, permits and insurance issues are very well covered: this type of information was found on 94% of the Points of Single Contact. Information on the qualifications needed to actually start a business can be found on 67% of the Points of Single Contact analysed, while information on procedures relating to the place where the service is carried out is provided on 55% of them. In descending order, information on taxes is covered by 85% of the Points of Single Contact, employment-related information by 76%, social security issues by 64%, issues related to international trade by 52%, and how to grow the business once it is established by 36% of the portals. Interestingly, many Points of Single Contact also provide advice on grants, loans, funding, and intellectual property rights issues (a 69% coverage).

The most complete Points of Single Contact, that cover all the nine thematic areas investigated by the study, are those in Estonia, Luxembourg, Germany - the *Land* of Hessen, and the United Kingdom. Points of Single Contact that could be improved in this regard are those in the following eight Member States: Austria, Denmark, Germany - the *Land* of Brandenburg, France, Ireland, Malta, Poland and Slovenia all cover less than half the thematic areas. It is however important to note that two of these thematic areas are not covered in the Services Directive, namely taxes and social services. When taxes and social services are not taken into account, both Portugal and Germany - the *Land* of Rhineland-Palatinate can be added to the group that covers all the thematic areas; France too then covers over half of the thematic areas.

The information needed to understand how to carry out business procedures can be found on either the Point of Single Contact portal or linked government websites. In fact, for 81% of the procedures needed to complete the six scenarios tested under the remit of the study, the information is available on the Point of Single Contact. Electronic interaction is possible for more than 50% of these procedures, at least through administrative forms that can be downloaded. However, only 24% of all procedures can be completed fully online (and not always by users from abroad).

There are significant differences between Member States' Points of Single Contact with regard to the sophistication of electronic procedures. Eight portals that are relevant to seven countries have more than 50% of procedures covered by full case-handling. The top ten countries' Points of Single Contact with the highest degrees of online sophistication in descending order are: Estonia, Liechtenstein, Luxembourg, Sweden, Italy, Slovakia, Denmark (both portals), the United Kingdom, and Portugal. In three countries (Estonia, Finland, and Norway), there is full transactionality.

The analysis shows that there were no major differences with regards to the maturity of the Points of Single Contact for the three business sectors investigated: construction services (architects); food and beverages (restaurants and catering); and tourism (travel agents and tour guides)

Almost half of the Points of Single Contact (45%) require an official national eID for national users, whereas around two-thirds (67%) require the use of a qualified eSignature for national users for at least some of the scenarios that were tested. When it is supported, electronic identification is needed to access online services that require authentication. These kinds of areas are those which involve accessing reserved secured areas to upload documentation or are secured users' personal areas. On the portals, areas that contain general information about online guides, procedures and support tools are almost universally available without there being a need for user identification.

Electronic signatures are used for data authentication purposes and to express consent. Various examples of where eSignatures are needed can be offered as illustration. They include: when a service provider using the Point of Single Contact is required to submit a document and the integrity of the document needs to be preserved or when agreement with the contents of a specific document needs to be acknowledged. Such documentation can involve requests about registration in business

registers or tax registers or declarations that confirm compliance with specific requirements appropriate to the services they offer.

With respect to the requirements on supporting documentation to be provided by service providers, applied by the Points of Single Contact, the approaches observed in the various Member States differ widely. Almost half of the portals (42%) apply high requirements of users, i.e., they request the submission of originals or certified copies in more than half of the types of administrative requirements examined. A remaining 55% apply low requirements, i.e., they also only for simple copies of documents in at least half of the types of administrative procedures included in the study.

Furthermore, the study confirmed that the lack of support for cross-border acceptance of eIDs and eSignatures is an important barrier for cross-border service delivery through the Points of Single Contact. Only half of the portals (19, or 58%) included in the study support online completion of procedures for cross-border users. Little progress has been made in this area. Indeed, only eight portals (24%) accept foreign official eIDs, while only 10 (30%) recognise foreign, qualified eSignatures. Even when recognition of foreign eIDs and foreign, qualified eSignatures is possible, it is only available on the Points of Single Contact of a very limited number of countries.

There is still a long way to go in order to move towards truly transactional eGovernment portals. However, many of the Points of Single Contact have plans to increase incrementally the number of online procedures.

The study shows clearly that much work remains to be done on the options of Member States dealing with eIDs and eSignatures other than the national eIDs or eSignatures. They must otherwise provide an alternative solution for electronic identification and authentication.

Having truly transactional eGovernment portals is important as businesses expect a "full service" approach for both start-up and cross-border service provision. Entrepreneurs want to find information on everything they need to do to start up a business directly on the portal itself. They do not want to find themselves limited only to information that is related to the scope of the EU Services Directive or other specific EU legislation. At the same time, businesses expect to find only information that is relevant to them: some Points of Single Contact already offer this kind of information through a "life events approach". Examples include the Czech Republic and Sweden. Furthermore, businesses expect a "critical mass" of e-services from the Points of Single Contact that should demonstrate clearly their added-value.

Overall, nearly 60% of the focus group participants found the completion of procedures "easy" or "ok". However, 40% had difficulties to complete the procedures. The difference in requirements between establishment and cross-border service provision was only easily understood by 52% of the focus group participants. For establishment scenarios, the relevant procedures were found by 63% of the focus group participants whereas only 33% found them for the cross-border scenarios. Less than half of the countries' Points of Single Contact (47%) make a clear distinction between requirements applicable to establishment and requirements applicable to cross-border service provision. Only in 40% of the cases were foreign end-users able to understand the requirements easily without knowing the country's administrative and legal system.

Important linguistic barriers also persist: although 73% of the Points of Single Contact provide some degree of multilingualism (this is largely available in English only), in most cases it is merely general information that is translated. Only 27% of Points of Single Contact provide translated administrative forms. In many countries, documents and applications are only accepted in the national language(s).

Concerning user support and help, static help tools are available on most of the Points of Single Contact. Telephone assistance is also provided, while more interactive communication tools like chat rooms are still only used in a few cases. Only the Dutch Point of Single Contact provides chat facilities in English. There still appears to be no use of social networks to interact with users.

The Points of Single Contact are not well known: only 30% of focus group participants were aware of the existence of the Point of Single Contact in their own country before participating in the study.

There is a need to set up branding campaigns for the portals, and the online branding could be improved. In many cases, a lack of resources was mentioned by Point of Single Contact managers as a barrier to effective awareness campaigns. Points of Single Contact could also rank higher when searched for on commonly-available search engines.

The study developed a composite indicator combining the indicators on the three domains: availability and quality of the services provided on the portals, use and usability of the portals, and back office

enablers. The results show that the gap between the high performing Points of Single Contact and the low performing ones is considerable. Estonia is the highest ranked portal by a large margin. It is followed – in that order – by Slovakia, Liechtenstein, the United Kingdom, Ireland, Spain, Sweden, Luxembourg, Denmark, and Italy.

There are major differences across the portals with regard to the strengths and weaknesses of each portal. Therefore bench-learning, the process of learning by comparing between peers, should be encouraged to foster progress of the Points of Single Contacts in the different domains.

The study shows that, by offering online information and online procedures to companies, the Points of Single Contact have a great potential to enhance cross-border service provision in the Single Market as well as boost growth and job creation. However, the potential of the Points of Single Contact can only be fully unleashed when they evolve towards fully-fledged online business platforms that respond to the needs of their users.

4 Policy recommendations

In this chapter policy recommendations and follow-up actions to be taken at the EU level for improvement of Points of Single Contact will be developed.

Recommendations for a “to do” list for effective Points of Single Contact:

- **Administrative simplification:** The further development of the Points of Single Contact should be associated with, and embedded in, initiatives for administrative simplification. The concept of eGovernment as a process whereby offline administrative complexity is transferred to the online world is now completely outdated. The development of business information portals must start from a critical review and simplification of the administrative processes that enhances the efficiency and usability of the website for both the users and the government agencies.
- **New user-oriented models of service:** Historically, eGovernment has evolved from a phase of “putting required procedures online” towards offering user-centric services to citizens and businesses in order to facilitate their personal, professional and corporate lives and foster business development. Web2.0 technologies allow eGovernment services to be transformed into platforms for information-sharing and interaction between government, citizens and businesses. Models of Points of Single Contact development should embrace the concepts of user-oriented design, collaborative service development and delivery, social networking, and crowd sourcing.
- **A life event approach:** The quality of the Points of Single Contact can be improved by developing a business “life event approach” for the portals. Life events are important events or stages in the life of a business, such as the registration of a company and its location, taking on human resources, dealing with tax administration and social security, and undertaking research and development. A fully transactional e-service that bundles together all the interactions needed around such life events could help develop the Points of Single Contact. It could act as a comprehensive tool that covers the complete needs of businesses, and thus improves the European business environment. Such an e-service should be offered as a coherent, bundled package, and not simply as a compilation of web links. The interactions required must be presented in a fluent logical way. All the information and forms needed must be brought together in a consistent manner.
- **Different pathways for different users:** The navigation of the website needs to be as user-friendly as possible. Different navigation paths should be combined: based on the life events of different types of user (whether national or cross-border) and according to various sectors and search engines.
- **Different information for different users:** Points of Single Contact should encourage cross-border investments or service delivery initiatives. In order to attract investment and cross-border trade, there needs to be a clear distinction between cross-border establishment and temporary service delivery, and the national establishment route. Appropriate information related to the cross-border routes must be available and translated into relevant languages.
- **Simplified access and use of the Points of Single Contact for entrepreneurs from other Member States:** This can be done by implementing solutions for cross-border identification and eSignatures, *inter alia* by complying with the legal instruments adopted to improve the cross-border recognition and technical support of electronic signatures (Decision 2009/767/EC, as amended by Decision 2010/425/EU, and Decision 2011/130/EU) and making use of existing tools and solutions either at EU level (that are available through a number of large-scale pilots) or possibly at national level.
- **User testing:** To improve the usability and take-up of the Points of Single Contact, it is recommended to work in a collaborative way with business representatives. New developments vis-à-vis the Points of Single Contact should be discussed and developed with

users, and existing applications should be tested on a regular basis in focus group or panel sessions.

- **Better back office procedures through the integration of competent authorities:**
 - A more effective linkage could take place with the portals of competent authorities at the sub-national level such as local authorities or prefectures/regional authorities.
 - For those Member States that do not yet cover the recognition of professional qualifications, there could be a more effective integration of the portals of the various professional bodies that could offer the electronic completion of procedures.
 - There could be more effective integration between the Points of Single Contact and the existing business support structures such as chambers of commerce or other forms of physical one-stop shop.
- **Better back office procedures through simplification and standardisation:**
 - There could be closer liaison with local authorities to ensure the standardisation/simplification of administrative forms for the most important procedures.
- **Better back office procedures through formal or legal arrangements:**
 - Consider putting into place formal and/or legal arrangements to govern the relationship between the relevant competent authorities and the Points of Single Contact. Include in this arrangement, for example, a standardised approach to handling support documents and to situations in which the authorities might wish to ask for the originals and/or certified copies and/or certified translations or where a scanned copy might be satisfactory and sufficient.
- **Tracking:** A comprehensive tracking system allowing the administrative application procedures to be followed through to completion should be included as it enhances the user experience.
- **Publicity and awareness-raising:** The overall awareness of the existence of the Points of Single Contact in the business communities remains low. There is a need to brand the Points of Single Contacts as *the* gateways to both national and especially cross-border service development and market extension.

Recommendations for a “to do” list for policy-makers:

- **A Charter:** There is a need to develop a "Point of Single Contact Charter" that contains best practices and defines common minimum standards for each Point of Single Contact. A comprehensive agreement on minimum standards of sophistication and usability for all the Points of Single Contact would stimulate convergent progress towards a new generation of business portals.
- **Standards for information for foreign businesses:** An important standard would be a common format for information for foreign businesses that offers priority to cross-border provision.
- **Regular user testing:** The countries should commit to a policy of regular user testing and improvement.
- **Regular benchmarking:** A regular benchmarking exercise could be used as a soft policy instrument to monitor progress, stimulate mutual learning, and promote excellence.
- **Administrative simplification:** The plans for further development of the portals must be associated with and integrated in further administrative simplification initiatives by fully using the potential of the provisions of the Services Directive (such as Article 5).
- **eSignature, eID and eDocumentation:** On the one hand, **national governments** should review the impact of their policy preferences and technical solutions with respect to eSignatures, eID and eDocumentation on cross-border accessibility, and should ensure that these preferences and the resulting design choices for their Points of Single Contact do not hinder compliance with the requirements of the Services Directive and the related Commission Decisions. Member States should ensure that any requirements in relation to the need for supporting documents in original, certified and/or translated formats are proportionate and justified, and take place on the basis of an objective assessment rather than existing administrative practice. Requirements with respect to eSignatures must comply with the aforementioned legal instruments that have been adopted to improve cross-border recognition. They should leverage the infrastructure established as a result of these legal instruments, in order to enable interoperability, specifically national trusted lists of supervised signature solutions. With respect to eID, Member States should strive to facilitate the accessibility of their Points of Single Contact by simplifying eID requirements wherever

reasonably justifiable, and by integrating leading interoperability solutions such as those delivered by the STORK large scale pilot. At the **European level**, the European Commission should monitor ongoing policy and legislative initiatives with respect to the revision of the eSignatures Directive and the mutual recognition of official eIDs (as announced in the Digital Agenda for Europe). The aim would be to ensure that the resulting outcomes are conducive to addressing the current challenges in the context of the Services Directive: in particular, with respect to the cross-border use and recognition of official eIDs and public sector eDocumentation.

References

Brooke, J. (1996). "SUS: a "quick and dirty" usability scale". In P. W. Jordan, B. Thomas, B. A. Weerdmeester, & A. L. McClelland. *Usability Evaluation in Industry*. London: Taylor and Francis.

Business Europe (2011a). *Report on the implementation of the Service Directive*. January 2011, p11.

Business Europe (2011b). *Are the Points of Single Contact Truly Making Things Easier for European Companies?* Services Directive Implementation Report. November 2011, Brussels, Business Europe. Available at:

http://ec.europa.eu/internal_market/services/docs/services-dir/conferences/28112011/28112011_report_business_europe_en.pdf

Eurochambres (2011). *Services Directive implementation – The Chamber's Perspective on the Points of Single Contact*. January 2011, Brussels. Available at:

<http://www.eurochambres.eu/Content/Default.asp?PageID=1&DocID=2994>

Hayes, B.E. 2008. *Measuring Customer Satisfaction and Loyalty: Survey Design, Use, and Statistical Analysis Methods*. Wisconsin, Milwaukee: ASQ Quality Press

European Commission Directorate General for Information Society and Media (2009). *Smarter, Faster, Better eGovernment. 8th Benchmarking Measurement*, prepared by CapGemini, Rand Europe, IDC Sogeti and DTI

IDABC (2009). *Study on Mutual Recognition of eSignatures: update of Country Profiles. Analysis & assessment report*. Brussels: IDABC, European eGovernment Services. October 2009. Available at: <http://ec.europa.eu/idabc/servlets/Doca7bf.pdf?id=32436>