COMMISSION STAFF WORKING DOCUMENT

Digital Agenda Scoreboard

1.   EXECUTIVE SUMMARY

The EU economy was marked by recession in 2012. According to the latest Commission figures, annual GDP in 2013 is forecast to contract 0.1% in the EU and 0.4% in the Euro area. Unemployment is at unacceptable levels in many countries, particularly for the youth. Constrained by high levels of debt, governments are under pressure to cut public spending. Against this background, there are few potential sources of growth and employment. One of the most important sources is technological progress, including digitisation, and its adoption by society.

Adopting ICT and adapting businesses to new technology is a key factor of competitiveness for every company. Similarly, using ICT innovatively improves public services and reduces costs as well as making them easier for citizens and businesses to access from a distance. Moreover, despite the high overall unemployment, there are shortages of ICT specialists in the EU, forecast to reach up to 900 000 unfilled vacancies by 2015. Hence, completing the Digital Agenda for Europe[1] (DAE), adopted by the European Commission in 2010 is more than ever a priority for attaining the Europe 2020 objectives.

The Digital Agenda identified 101 specific policy actions across 7 domains: the digital single market; interoperability and standards; trust and security; fast and ultra-fast internet access; research and innovation; digital literacy, skills and inclusion; and ICT-enabled benefits for EU society. This combined set of actions is intended to stimulate a virtuous circle of investment in and usage of digital technologies. A review of the DAE adopted by the Commission in December 2012 outlined the areas where further emphasis was needed to attain those goals. The Digital Agenda Scoreboard reports on progress made in achieving the DAE goals.

This document is the third edition of the Digital Agenda Scoreboard, assessing overall impact on the basis of 13 key performance targets, and reporting on the progress of policy actions between June 2012 and May 2013. It is accompanied by a series of online publications looking in more detail at specific aspects of the Digital Agenda, such as digital competences or high-speed broadband[2]: http://ec.europa.eu/information_society/digital-agenda/scoreboard/index_en.htm.

There is much good news to report. For the last three years, regular internet usage has been rising steadily, especially among disadvantaged groups, while non-usage has been falling. Those users also do more online, more shop online and more use eGovernment services, including advanced ones. Roaming prices have fallen much faster than in the past, although this is primarily due to legislation, rather than to increased competition. Basic broadband coverage is nearly complete, although not all of it is ensured by fixed lines. Also, the market share of Light-Emitting Diodes continues its expansion course. In all of these areas, the targets are likely to be met.

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[1]   Available at http://ec.europa.eu/information_society/digital-agenda/index_en.htm.
[2]   The content of these online publications corresponds to what used to be published in the annual Digital Competitiveness Reports.

However, not all the news is good. On current trends, the target of 20% of citizens shopping online cross-border by 2015 is certain to be missed. Similarly, the share of SME selling online likely will remain far below the target of 33% by 2015.

Finally, for the 2020 targets it still is too early to tell. The take-up of high-speed broadband has started to accelerate, but is still very far away from the levels desired for 2020. Public R&D in ICT has grown, but so far by less than the average growth rate required to double by 2020.

Figure 1: How the EU scores on the Digital Agenda targets
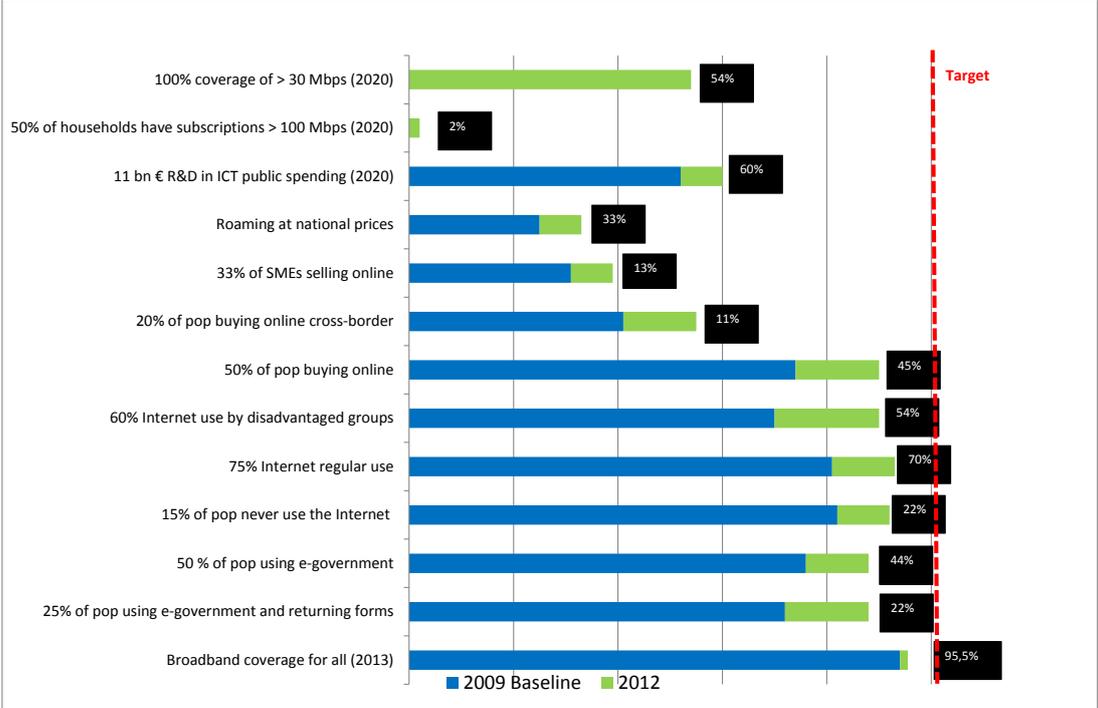
Source: Commission services

The Commission has so far completed 61 actions under the Digital Agenda, while 8 have been delayed or are at risk of being delayed. The remaining 32 actions, under the responsibility of either the Commission or the Member States, are on schedule for completion by their respective deadlines.

The Digital Agenda was heavily front-loaded from the beginning, with a large number of actions scheduled for 2010 and 2011. As a result, the number of actions to be reported upon in this edition is smaller than in previous years. Indeed, for one of the pillars, R&D, there was no action to be completed this year. For some of the others, there was just one action to be named. Of course, this doesn't mean that no action is taking place; activities with a longer time horizon are on-going, as do activities not explicitly included in the Digital Agenda.

The Digital Agenda review, which was adopted at the end of 2012, defined 31 new actions. Nine of these actions have already been executed. These are included in this Scoreboard (section 5).

2. THE KEY PERFORMANCE TARGETS

Annex 2 of the Digital Agenda sets out the key performance indicators. This limited set of indicators provides numerical evidence of the progress towards a selected group of headline

targets. This section presents the performance of the EU with respect to these targets. As such, they do not follow the seven-pillar structure.

- **Key performance target 1a**: the entire EU to be covered by broadband by 2013.

The coverage of fixed broadband networks was stable in 2012 at 95.5% of the European population. Urban citizens in all Member states are well covered, but rural fixed coverage still stands below 80% in 10 member states, pointing to a gap in the use of structural funds, although it rises to above 90% in all but three (Slovakia, the Czech Republic and Estonia) if mobile coverage in rural areas is included. Including also satellite technology, coverage is almost complete at above 99.9%, but satellite take-up is not yet widespread in the rural areas.

At the same time, there are more and more public funding schemes supporting broadband rollout in Europe, but they are concentrated in the United Kingdom, Italy and Germany. In 2012, the European Commission took 21 decisions regarding broadband projects involving public funding. The total amount of broadband State aid approved in 2012 was approximately € 6.5 bn, which is more than three times higher than a year earlier, € 6 bn of which was accounted for by the three Member States mentioned.

- **Key performance targets 1b and 1c**: the entire EU to be covered by broadband above 30 Mbps by 2020 and 50 % of the EU to subscribe to broadband above 100 Mbps by 2020

High-speed broadband coverage and uptake is growing. Now, 54 % of households have access to fast or ultra-fast (above 30 Mbps) Internet access, up from 49% last year. The wider availability of high-speed connections is also reflected in uptake patterns. Indeed, 59% of all fixed broadband connections now provide speeds of 10 Mbps and above, and even growth in broadband subscriptions above 30 Mbps has taken off, with penetration going from 2.5% to 4.2% in one year (Figure 2). Interestingly, among the top six member states in terms of penetration above 30 Mbps, one can find Lithuania, Latvia and Romania, in a reversal of the ranking for basic broadband. The fastest growth by far can be observed in Belgium, adding 9.1 points in one year, which is more than the total achieved so far by 23 member states. Italy and Greece have only marginal high-speed broadband subscriptions. Superfast connections above 100 Mbps remain very scarce, but have doubled from 1.6 % to 3.4 % of total broadband connections.

- **Key performance target 2a**: 50 % of the population to buy online by 2015

Progress towards achieving the target of 50 % of the population using the internet to purchase goods and services is steady: in 2012 EU-wide the share stands at 45%, up another two percentage points since 2011 and eight since the Digital Agenda was launched. There are three groups of countries: the Nordics and the large Northwestern economies (plus Luxemburg) are already well beyond the target of 50%; especially the Nordics continue to progress rapidly, adding 3.5 points this year. A second group of countries from all regions is in line with the EU average and will most likely achieve 50% by 2015, as will the EU as a whole; Slovakia's performance of +8 points compared to 2011 stands out. Most of the Southern and Eastern member states are in a third group below 35%, which will find it quite a challenge to reach 50% by 2015. Nevertheless, some countries in this group made significant progress since 2011, with Portugal, Spain and Lithuania adding 4 points each.

Figure 2: High speed broadband penetration

High-speed (at least 30 Mbps) broadband penetration

Legend: Jan-12, Jan-13
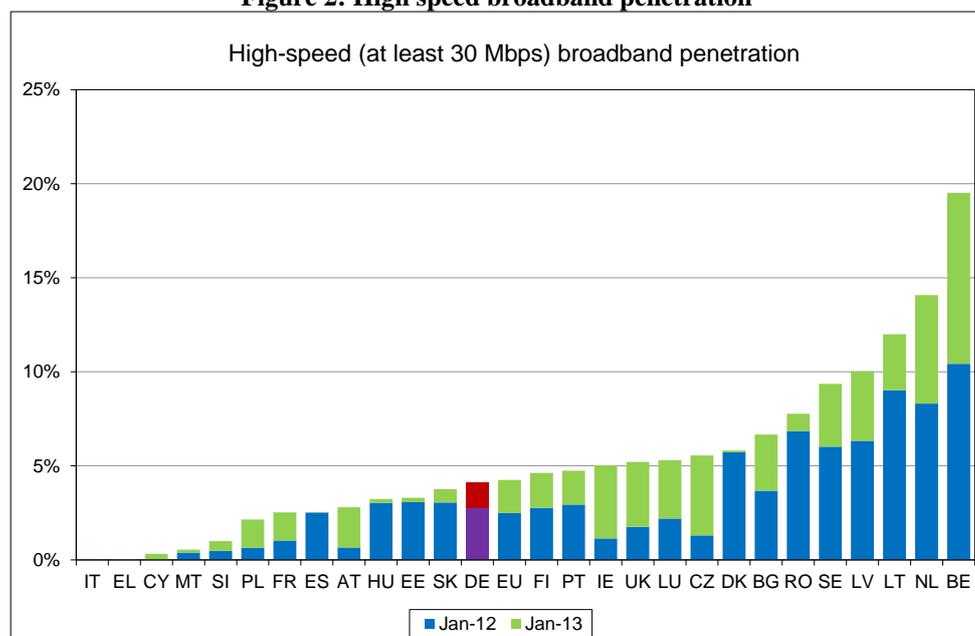
Source: Commission services based on COCOM. Total number of subscriptions by households and enterprises divided by population.

- **Key performance target 2b**: 20 % of the population to buy online cross-border by 2015

The proportion of cross-border online purchasers remains low, reaching only 11%. While the gain of 1.4 points since 2011 is slightly larger than in the previous years, it remains too low to achieve the objective of 20% by 2015 (Figure 3)., Growth is concentrated in those countries already displaying relatively high levels, with Austria, Luxemburg and Ireland among the fastest growing, together with Slovakia and Latvia. However, in a number countries buying online from abroad remains a marginal activity, and in the Czech Republic, Poland and Romania there was no growth, either. At the other extreme, in the smallest countries Cyprus, Malta and Luxemburg, virtually all of those who buy online also buy from other member states.

Figure 3: National and EU cross-border purchases of individuals (% of individuals)
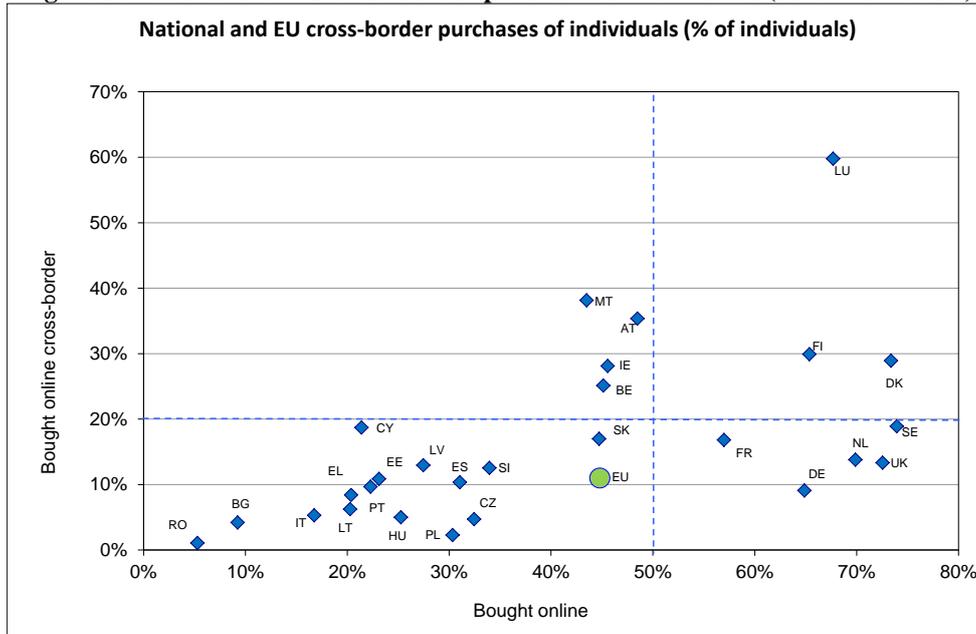
Source Eurostat, Community survey on ICT usage in households and by individuals, 2012: percentage of individuals between 16 and 74 who ordered goods or services for private use during the last year, and who ordered from sellers in other EU countries; horizontal lines represent targets

- **Key performance target 2c:** 33 % of SMEs to make online sales/purchases by 2015

Figure 4: eCommerce by SMEs
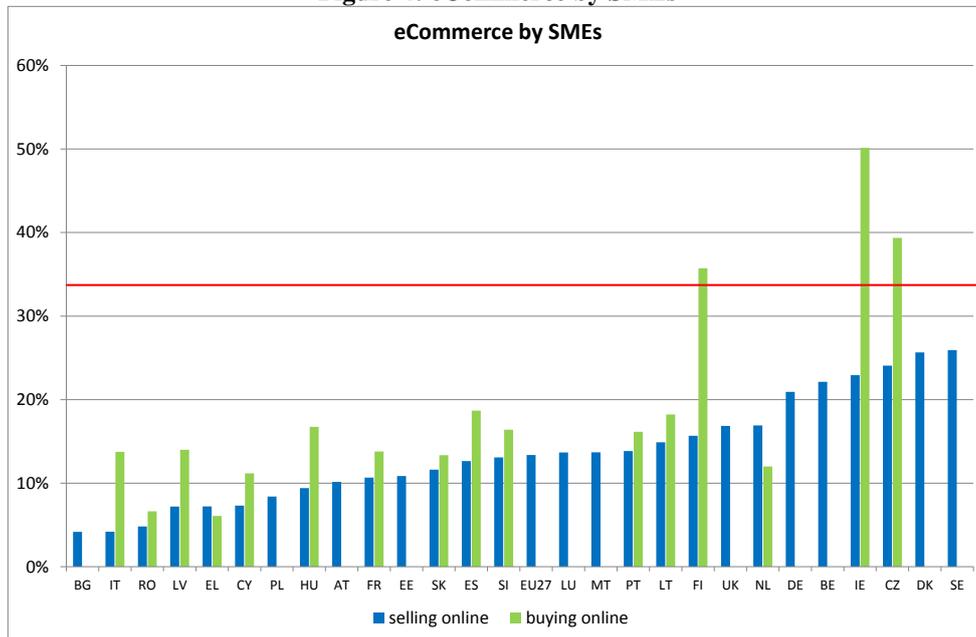
Source: Eurostat, Community survey on ICT usage and eCommerce in enterprises. (Enterprises with 10-249 persons employed purchasing/selling online in 2011at least 1 % of their orders/turnover; horizontal line represents both targets); data for eleven member states not available

Online selling remains a niche activity for European SMEs, with only a quarter of SMEs using this distribution channel even in the best performing countries Denmark and Sweden (Figure 4). Moreover, adoption of eCommerce for selling is slow: across the EU the share went up by only 1 point from 12% to 13%. However, the fast growth of front runners Sweden

(+2) and Denmark (+3) shows that the slow increase is not due to natural saturation among SMEs; other relatively fast growing countries were the UK and Slovenia (+3). Online purchasing is much wide spread, but due to data limitations an EU level cannot be calculated[3].

- **Key performance target 2d**: the difference between roaming and national tariffs to approach zero by 2015

Roaming prices declined by 4.8 cents in 2012, which is four times faster than in the two previous years (Figure 5). However, roaming prices are still more than three times higher than national call prices. The decline is mainly due to the effects of the new roaming regulation which came into force on 1 July 2012 and is not the result of increasing competition.

**Figure 5: Price differences between roaming and national calls**
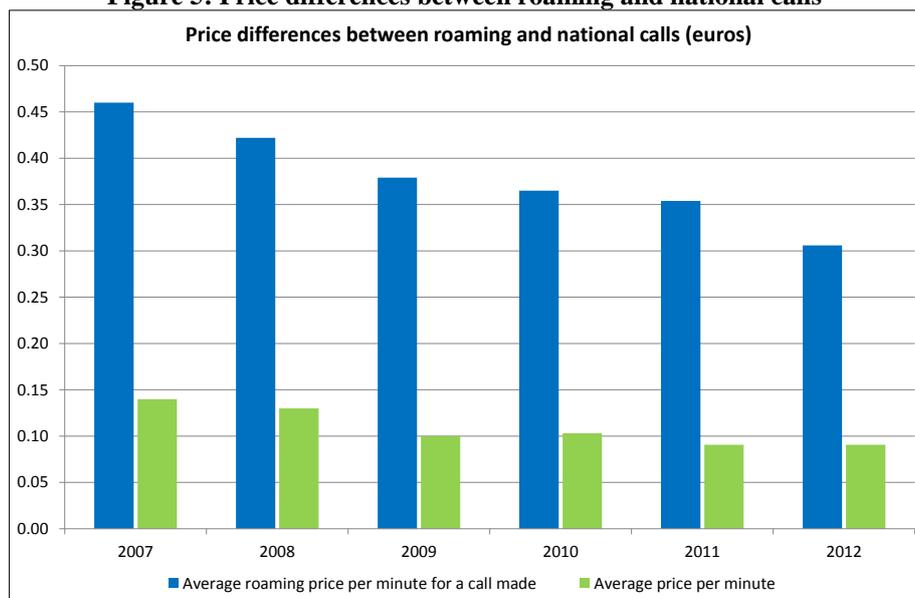
Source: Commission services based on BEREC

- **Key performance target 3a**: to increase regular internet usage from 60 % to 75 % by 2015, and from 41 % to 60 % among disadvantaged people.

- **Key performance target 3b**: to halve the proportion of the population that has never used the internet from 30 % to 15 % by 2015

Regularly Internet use continues its road to becoming the norm in Europe, adding another two percentage points in 2012 to reach 70% (Figure 6). This brings total progress since the launch of the Digital Agenda to 10 percentage points, two thirds of the targeted 15 points. Conversely, the percentage of non-users has fallen last year by 2 points to 22 %, compared to an initial level of 30% in 2009. Most of the growth in use now comes from the lower half of the table, with Romania and Portugal both achieving the fastest growth in regular use (+6% and +4% respectively) and the fastest decline in non-use (both -6%). France and Luxemburg managed to add roughly 4 points despite already high initial levels, showing that even in the upper half of the table there is still room for growth.

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[3] National data collection has become optional since 2011, which is why data are available only for sixteen Member States accounting for just over half of the EU population.

Figure 6: Regular internet use in 2012 (% of individuals)

**Regular internet use in 2012 (% of individuals)**
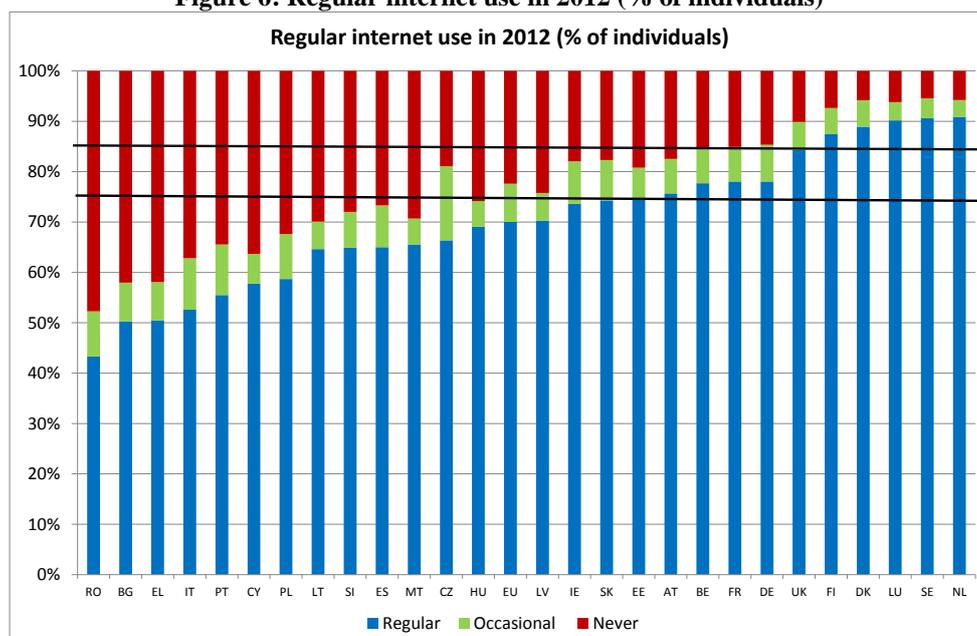
Source: Eurostat, Community survey on ICT usage in households and by individuals; persons aged 16-74 using the Internet at least once a week or never; the rest is classified as occasional users; horizontal lines represent targets

The use of the internet by disadvantaged groups continue to slowly catch with the overall population. Their level of regular Internet use went up last year by 3 percentage points to 54%, bringing overall progress to 13 points compared to 2009. The share of disadvantaged individuals who used the Internet daily was 43% in 2012, up from 40% the year before,, while regular but not daily use remained at 11%. Continuing progress at the current rates would result in achieving all three targets by 2015.

- **Key performance target 4a**: 50% of citizens to use eGovernment by 2015, with more than half returning completed forms

The proportion of citizens using the internet to interact with public authorities has resumed growth, reaching 44% in 2012 after 41% during the two preceeding years (Figure 7). Interestingly, the best performances were spread all the way from the bottom of the table (Romania with a jump of +24, Greece and Lithuania +7 each), through the middle (Latvia and Spain +6 each), to the top (Sweden and France +5). Remarkably, the share of those eGovernment users actually returning completed forms remains stable at 50%, although national figures vary widely, between Romania, where only 10% of eGovernment users send back filled forms, to Denmark, where 85% do. One should note that low overall use can go along with a high share of sending back forms (Lithuania 80%), while high use can go along with a relatively low share (Luxemburg 40%).

Figure 7: Use of eGovernment by individuals
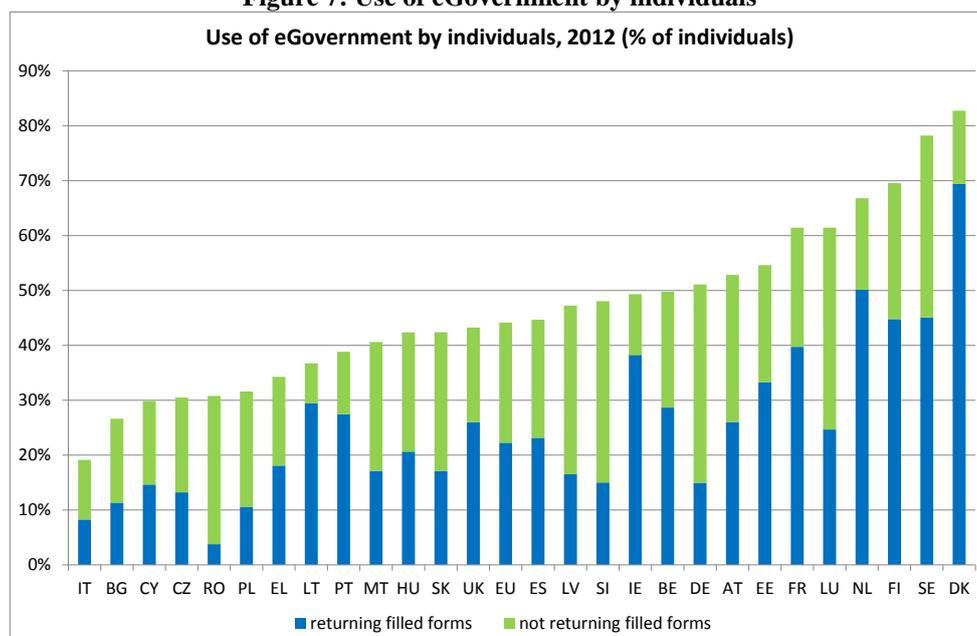
Source: Eurostat, Community survey on ICT usage in households and by individuals, 2012; percentage of persons aged between 16 and 74 using eGovernment services in the last 12 months; horizontal lines represent targets

- **Key performance target 4b**: all key cross-border public services, to be agreed by Member States in 2011, to be available online by 2015

Member States have not yet agreed on a list and the discussion is ongoing.

- **Key performance target 5**: to double public investment in ICT R&D to € 11 bn by 2020

In 2011, public investment in ICT R&D (Figure 8) suffered from the budgetary restraints in member states, increasing by only 1.8%, compared to a required annual growth of 5.5 % between 2007 and 2020 in order to reach the target. Although recent estimates for the previous years have been slightly revised up, the result is that public R&D in ICT is currently roughly 3 % below the required trajectory. It is also interesting to note that the share of ICT in publicly funded research continues to increase, reaching 7.3%. Indeed, it is thanks to this increased share that public R&D in ICT rose at all and did not fall like overall public R&D. Regarding business R&D in ICT[4], in 2010 it recovered a bit from the 7.4% fall of the previous year, growing by 2.7% according to provisional estimates. However, this partial recovery obviously was not yet sufficient to return to pre-crisis levels.

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[4] Sectoral BERD figures are released with a significant delay, which is why values refer to an earlier year than estimates for public R&D in ICT

Figure 8: Public investment in ICT R&D

Public investment in ICT R&D
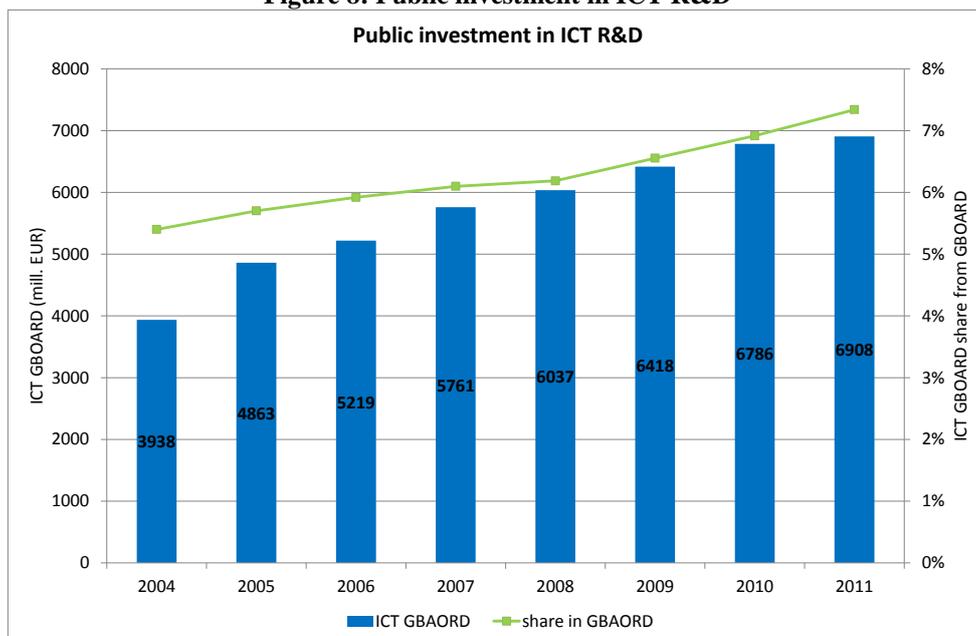
Source: IPTS5. Values for EU-27 in EUR m. NB: the baseline estimate for 2007 has been revised due to a new methodology;

- **Key performance target 6**: to reduce energy use of lighting by 20 % by 2020

The shift towards energy-efficient lighting is happening fast. Indeed, the market share in value of solid-state lighting such as light-emitting diodes (LEDs and OLEDs), which consume little energy, increased from 12.8 % in 2011 to 14.4% in 2012, an eight-fold increase compared to the Digital Agenda starting point of 1.7 % in 2009. It is to be expected that this rapid growth will continue apace in the remaining years of the Digital Agenda, ensuring that the target will be met.

3. INVOLVING STAKEHOLDERS

The Commission will continue to cooperate and engage with Member States and stakeholders to ensure successful implementation of the Digital Agenda. Throughout last year, engagement helps to shape the policy approach; ideas and issues that emerged from online discussions, the Digital Agenda High Level Group and set-piece events such as the Digital Agenda Assembly 2012 and visits to all Member States ("Going Local") contributed towards the content of the DAE Review (see below under 6).

Online engagement was the focus of much of the outreach efforts, and was often tied in with events such as the Digital Agenda Assembly and the Going Local series of visits. Contributors were able to post comments and suggestions, and to respond to blogposts and tweets by Commission officials and Vice President Kroes.

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[5]   Stancik, J. (2013 Public ICT R&D Funding in the EU . Institute for Prospective Technological Studies, JRC Technical Report (forthcoming); will be available at http://http://is.jrc.ec.europa.eu/pages/ISG/PREDICT.html.

The annual Digital Agenda Assembly in Brussels in June 2012 facilitated discussions on progress towards implementing DAE targets, and seeking solutions to challenges. Around 1100 stakeholders attended and participated via a series of interactive workshops and plenary sessions, participation was also be possible via a variety of online and social media tools.

Going Local - the annual outreach initiative whereby the European Commission undertakes visits to each Member State –built upon the previous two exercises. Online and social media engagement before, during and after the visits enabled detailed discussions tailored specifically to the needs of each Member State.

Finally, the Digital Agenda High Level group, made up of Member State representatives, met regularly throughout the year to discuss implementation of the DAE at a national level. In 2012, Member States took part in a study to monitor progress of DAE actions specific to them; the data can be updated by Member States in real time, to reflect changes in status.

4. KEY POLICY ACTIONS IN THE THIRD YEAR

The Digital Agenda is structured into seven 'pillars': A vibrant digital single market, Interoperability and standards, Trust and security, Fast and ultra-fast internet access, Research and innovation, Enhancing digital literacy, skills and inclusion, and ICT-enabled benefits for EU society. The following sections address policy actions planned under these pillars for June 2012 to May 2013 in the Digital Agenda.

4.1. A vibrant digital single market

As shown by the data on eCommerce (see section 2), buying online is still very much a national activity. Moreover, growth rates for cross-border eCommerce are low, which poses a real challenge for the digital economy. After the numerous proposals in 2011, last year saw a more measured activity, focused on aspects related to intellectual property, consumer confidence, complemented by the new roaming regulation.

On intellectual property, on 11 July 2012 the Commission adopted a proposal for a Directive on collective rights management and multi-territorial licensing of rights in musical works for online uses. The proposal aims at ensuring that right holders have a say in the management of their rights and envisages better functioning collecting societies as a result of the set standards all over Europe. The proposed directive will also ease the multi-territorial licensing of authors' rights for the use of music on the Internet. This should lead to improved access to and more offer of music online.

On 18 December 2012, the Commission adopted a Communication on content in the Digital Single Market. It introduces a structured stakeholder dialogue, which was launched in February 2013 and seeks to deliver rapid progress in four areas through practical industry-led solutions: cross-border access and the portability of services; user-generated content and licensing for small-scale users of protected material; facilitating the deposit and online accessibility of films in the EU; and promoting efficient text and data mining for scientific research purposes. In parallel, the on-going review of the EU legal framework for copyright, based on market studies, impact assessment and legal drafting work, aims to reach a decision in 2014 on whether to table legislative reform proposals.

From December 2012 to March 2013, the Commission opened a public consultation on the efficiency of proceedings and accessibility of measures regarding civil enforcement of intellectual property rights. These data will enable the Commission to conduct a comprehensive assessment of the functionality of civil enforcement systems put in place in the Member States. The responses are currently being evaluated.

The Commission's work on payments has been pursued. Following the Green Paper on an integrated European market for card, internet and mobile payments, and the subsequent public consultation, the Commission plans to adopt a legislative initiative on multilateral interchange fees and a proposal for a review of the Payment Services Directive in the second quarter of 2013.

To increase consumer confidence in the Digital Single Market the Commission has completed two actions last year. On 17 December 2012, a Code of EU online rights, compiling the basic set of rights existing in EU legislation and related to the digital environment, was integrated in Your Europe - Citizen's portal. In fact, European citizens enjoy a series of rights that are relevant to the digital environment, such as freedom of expression and information, protection of personal data and privacy, requirements for transparency and universal telephone and functional internet services and a minimum quality of service. However, these existing rights are scattered across various EU legal instruments and are not always easy to grasp. The Code intends to raise awareness and understanding about key digital rights of EU citizens.

On 21 March 2013, Commission services published a study on "EU online Trustmarks – Building Digital Confidence in Europe". This study provides an analysis of the current state-of-play on trustmarks in Europe. Four policy options are reviewed by the study and the final report addresses the pros and cons of these options. The Commission is currently considering the results of the study.

Moreover, the 2011 Commission proposals for a Directive on Alternative Dispute Resolution for consumer disputes and for a Regulation on Online Dispute Resolution for consumer disputes were adopted by the Council and the European Parliament on 22 April 2013. They include in particular the setting up of a European online dispute resolution platform by the Commission which will allow consumers and traders resident in the EU to submit to the competent alternative dispute resolution entity, electronically and in any EU official language, their complaints relating to an online sales or service contract.

Finally, considering that the decline of roaming prices in recent years has been too slow, the new roaming regulation was adopted on 13 June 2012 and entered into force on 1 July 2012. It further lowers existing ceiling for voice calls and SMS, introduces a ceiling for data roaming, promotes transparency of roaming charges, and provides for a safeguard against unexpected roaming bills.

4.2. Interoperability and standards

Interoperability between ICT services and applications is a key necessity for a productive economy, and standards are vital for interoperability. Nevertheless, as far as envisaged measures to license interoperability information are concerned, following a public consultation on Access to Interoperability Information of Digital Products and Services, legislative measures do not appear to be appropriate to address the issues at stake. A staff working document describing the various outcomes will be published soon. Subsequently, the potential of non-legislative measures will be explored in 2013, such as the development of model licences for interoperability information and guidelines for estimating the value of interoperability information.

In addition, in the second quarter of 2013 the Commission intends to adopt a Communication presenting guidelines that should help public authorities to make better use of standards in order to avoid being locked-in into ICT systems. This should also increase the number of responses to call for tenders for ICT public procurements. In support of the approach outlined in the Communication, the Commission will organise meetings where public authorities can

exchange best practices and a light monitoring program will be set up in order to measure the effects of the better use of standards.

4.3. Trust and security

The increasing importance of ICT networks for the economy makes attacks on these networks both costlier and more attractive to cyber-criminals. For the Cybersecurity Strategy of the European Union, see the new actions under the refocused Digital Agenda (section 5).

4.4. Fast and ultra-fast internet access

A key objective of ICT policy in all advanced economies is to ensure ubiquitous Internet access at speeds fast enough to enable the network-based knowledge applications needed for tomorrow's competitiveness. In the past year. the Commission's focus was on discussions with member states on funding for high-speed broadband deployment.

As part of the revision of the European Structural and Investment Funds period for the 2014-2020, in October 2012 the Commission services adopted positions on the development of the Partnership Agreements and programmes underlining the need for broadband deployment where appropriate. Regarding the Connecting Europe Facility (CEF), in February 2013 the budget proposed by the Commission for digital networks and services infrastructure of €9.2 bn (in constant 2011 prices) was cut to € 1 bn in the conclusions of the European Council on the Multi-annual Financial Framework (MFF) for the period 2014-2020.

As far as the implementation of national broadband plans by the end of 2012 is concerned, Member States' national broadband plans remain incomplete, and not all of them address how to reach the DAE broadband targets.

For broadband state aid guidelines and civil engineering cost reductions, see the new actions under the refocused Digital Agenda (section 5).

4.5. Research and innovation

After the adoption by the Commission of the major revision of ICT R&D support by the European in the Horizon 2020 at the end of 2011, there was no legislative action due for completion in 2012/13.

4.6. Enhancing digital literacy, skills and inclusion

The Internet and ICT have reached most of society, but not all European citizens are equipped with the skills needed to achieve the goal of 'Every European Digital' by 2015, Europe needs to develop the ICT skills base of its population, in particular its labour force, and to ensure that all citizens can access the Internet.

On 3 December 2012, the European Commission adopted a proposal for a Directive on the accessibility of the public sector bodies' websites. This Directive would introduce mandatory EU standardised accessibility features, from the end of 2015, for 12 types of websites, including websites for essential government services like social security and health related services, job searches, university applications and issuing of personal documents and certificates.

Regarding digital literacy, the Gdansk Roadmap for Digital Inclusion was developed through stakeholder consultation and had already been launched in October 2011. However, the development by Member States of long-term e-skills and digital literacy policies, which was due by the end of 2011, is not yet complete in all Member States.

The development of an online interactive platform for consumer education, including materials on new media technologies and media literacy has resulted in a community educational website called "Consumer Classroom", aimed at teachers of 12-18 year-olds, which was launched on 15 March 2013. The updated Code of EU online Rights takes into account the latest legislative developments.

Last but not least, work on the identification and recognition of what one understands under digital literacy/competences has been integrated into the Grand Coalition on Digital Jobs (see the new actions under the refocused Digital Agenda, section 5).

4.7. ICT-enabled benefits for EU society

ICT is a cornerstone of many policy initiatives, therefore not limited to technology policy or to the ICT sector. In 2012, key initiatives concerned energy efficiency, intelligent transport, health, cultural heritage, and efficient public administration.

Concerning energy efficiency, the new Energy Efficiency Directive 2012/27/EU was adopted on 25 October 2012. The Directive foresees amongst other measures an exemplary role to be played by the public sector in driving energy efficiency improvements through public procurement of energy-efficient products (notably office equipment covered by the EU-US Energy Star Agreement) and services. Green Public Procurement criteria for street lighting and indoor lighting were published in early 2012. Moreover, the final results of a study on Methodologies to Measure the Potential of Smart Grids for Green House Gas Reductions was finalised on 4 June 2012.

Regarding intelligent transport and intelligent energy, on 10 July 2012 the European Commission launched a Smart Cities and Communities European Innovation Partnership (SCC), by joining ICT to the existing SET-PLAN Smart Cities and Communities Initiative. This Partnership will bring together the demand and the supply of innovative solutions, pool research and innovation resources from energy, transport and ICT, and focus them on actions that demonstrate and propagate cost-effective technological and innovative non-technological solutions that are on the verge of commercialisation. Regarding EU support to showcase commercial-scale solutions, for 2013 alone, € 365 million in EU funds have been earmarked for the demonstration of these types of urban technology solutions..

As far as health is concerned, the eHealth Network set-up by Article 14 of Directive 2011/24 on patients' rights in cross-border healthcare, which is composed of national authorities responsible for eHealth, plans to draw up guidelines on non-exhaustive data set for patients summary/electronic health records that can be exchanged across borders by November 2013. These guidelines will enhance interoperability between electronic health systems and continuity of care and to ensure access to safe and quality healthcare.

In terms of cultural heritage, on 26 September 2012 the Commission presented a strategy to unlock the full potential of the cultural and creative sectors in the EU to boost jobs and growth. This strategy focuses on the promotion of a modern regulatory environment and stronger partnerships between different policies, in particular culture, education, industry, economic affairs, tourism, urban and regional development, and territorial planning. It also proposes a €1.8 billion 'Creative Europe' programme for 2014-2020.

The Commission Recommendation on the digitisation of cinemas (originally planned for 2011) has been transformed into a proposal for a Council Recommendation on European film in the digital era, with an enlarged scope including film heritage, new models of on-line distribution and media chronology. It is now is due to be adopted in the second quarter of 2013.

Regarding the improvement of efficiency in public administration, the European Commission adopted its ambitious IT strategy "e-Commission 2012-2015" on 1 August 2012. The new strategy aims among others to improve the transparency of the Commission and to eliminate digital barriers between European public administrations. The strategy is guided by principles such as openness and reusability. It will be implemented via a rolling action plan, which is updated on annual basis.

On 17 December 2012 the review of the Public access to Environmental Information Directive was published, finding that application of the Directive has substantially improved access to environmental information on request. However, as the emergence of an information society requires a shift from an approach dominated by information-on-request needs to an approach centred on active and wide dissemination using the latest technologies, the Commission offers to help Member States to structure information better for active dissemination.

Finally, the 4th meeting of the eGovernment Expert Group took place on 22 February 2013. Member States and the Commission pointed out the progress on cross-border public service activities in the new Large Scale Pilot eSENS,. In their meeting the eGovernment Expert Group agreed to endorse a number of focus areas and key enablers for digital cross border public services.

5.   THE DIGITAL AGENDA 2012 REVIEW

A large majority of actions having been scheduled for the first three years, the Commission revisited the strategy in a review adopted in December 2012[6] and refocused the Digital Agenda on the following key areas:

- Creating the world's largest and richest digital single market for content and services;

- Speeding up public sector innovation;

- Stimulating private investment in high-speed fixed and mobile broadband networks,;

- Creating the world's largest cloud enabled ICT market;

- Fostering a secure and trustworthy internet environment,

- Spurring innovative web-based ventures and promoting digital skills

- Funding key enabling technologies.

For each of these areas, the refocused Digital Agenda proposes one key transformative action, complemented by supporting actions, a total of 31 actions altogether. Despite the short time span since its adoption, nine actions have already been carried out.

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[6]   The Digital Agenda for Europe – Driving European Growth digitally, COM (2012) 784 of 18.12.20012, available at http://ec.europa.eu/digital-agenda/en/news/digital-do-list-new-digital-priorities-2013-2014

- The European Cloud Partnership, bringing together industry and the public sector to establish a Digital Single Market for cloud computing in Europe, was established on 19 November 2012.
- On 5 December 2012, the Commission launched a Global Alliance against Child Sexual Abuse Online in close cooperation with the EU Member States and the United States.
- On 19 December 2012 the European Commission adopted revised guidelines for the application of EU state aid rules to the broadband sector, containing in particular a reinforcement of open access obligations and improved transparency rules.
- On 7 February 2013, the Commission adopted its cyber security strategy "An Open, Safe and Secure Cyberspace", representing the EU's comprehensive vision on how best to prevent and respond to cyber disruptions and attacks.
- Simultaneously, it adopted a proposal for a Directive on Network and Information Security, a key component of the overall strategy requiring all Member States, key Internet enablers and critical infrastructure operators to ensure a secure and trustworthy digital environment throughout the EU.
- On 4 March 2013, the Commission launched the Grand Coalition for Digital Jobs, a multi-stakeholder partnership to address the persistence of a large number of unfilled vacancies for ICT specialists.
- On 26 March 2013, the Commission adopted a proposal for a Regulation on cost reductions for civil engineering works, which account for up to 80% of the cost of installing broadband networks. By avoiding unnecessary digging, the Commission's draft Regulation could save between 40 and 60 billion euro or up to 30% of the total investment costs.
- On 24 April 2013, the Commission adopted a Green Paper: Preparing for a Fully Converged Audiovisual World: Growth, Creation and Values, exploring what convergence of digital technologies and content could mean for Europe's economic growth and innovation, cultural diversity, and consumers, especially those that may need protection, such as children.
- On 23 May 2013, the Commission proposed a New European Industrial Strategy for Electronics. By better coordinating public investments in micro- and nano-electronics (such as semiconductors and computer chips), it is designed to expand Europe's advanced manufacturing base and to mobilise €100 billion in new private investments. On the same day, five major projects were launched as a first step of implementation of the strategy.

Progress on the other actions will be reported in the future editions of the Digital Agenda Scoreboard.

6.   READ MORE

The evidence provided in this document represents only a small part of the data available to measure the progress of the Digital Agenda. A more detailed analysis can be found under http://ec.europa.eu/information_society/digital-agenda/scoreboard/index_en.htm.