



Study on a marketing plan to stimulate the take-up of eID and trust services for the Digital Single Market

EXECUTIVE SUMMARY

A study prepared for the European Commission

DG Communications Networks, Content & Technology by:



This study was carried out for the European Commission by:

PwC EU Services EEIG



Internal identification

Contract number: 30-CE-0744757/00-17

SMART number 2015/0046

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ISBN 978-92-79-79344-8

doi:10.2759/693543

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EXECUTIVE SUMMARY

This report is the outcome of the SMART 2015/0046 study on a marketing plan to stimulate the take-up of eID and trust services for the Digital Single Market.

Project description

Context

The eIDAS Regulation¹ sets a predictable regulatory environment for EU citizens, business, and public administrations to confidently go digital through the use of electronic identification (eID) and trust services (i.e., e-signatures, e-seals, e-time stamping, e-delivery service and website authentication).

By leveraging the opportunities of eIDAS, citizens may safely shop online, make use of financial services, access public services, or set up a business. Furthermore, businesses can save millions by benefiting from electronic procurement or participating in tenders, and public authorities can increasingly offer online public services, allowing for more convenient, secure, and transparent service provisioning to citizens.

On top of operational benefits for the civil society, the Regulation contributes to achieve the high-level objective of the EU of enhancing the Digital Single Market (DSM), which has the potential to generate up to EUR 250 billion of additional growth in Europe by improving Europe's competitiveness.

In this context, a legal trust framework by itself does not automatically lead to the realisation of its opportunities. Although demonstrably a large market and interest exist for the use of eID and trust services, many parties are still unaware of the opportunities (and obligations) flowing from the Regulation. If the tools are not taken up effectively, users may be reluctant to increase their online interactions, let alone in a cross border context. This creates a risk for the completion of the DSM.

The legal adoption of the Regulation does not mean the end of the process, but rather the beginning of a new one. To facilitate the uptake of eID and trust services, and therefore contribute to the continuous improvement of the DSM, it is essential that:

- The EU understands how the market for eID and trust services is functioning;
- The EU ensures that stakeholders on the demand side (public or private) are aware of the benefits brought about by eID and trust services, and how to access them;
- Stakeholders from the supply side know the market to figure out which solutions are expected.

¹ Regulation (EU) No 910/2014 of the European Parliament and of the Council of 23 July 2014 on "electronic identification and trust services for electronic transactions in the internal market and repealing Directive 1999/93/EC"

Study objectives

The main study objectives were to devise a market and economic analysis at EU level, and concretely illustrate how global market dynamics and trade opportunities should drive the conception/development of eIDAS-related policy and industrial initiatives contributing to realise a fully integrated DSM.

On the basis of these findings, a "marketing plan" for eID and trust services was to be established. Furthermore, the eIDAS European Observatory, which serves as a virtual network of stakeholders to exchange ideas and good practices was to be supported.

Study team

The study team was composed of experts from the following fields: marketing, market analysis and data collection, communication and dissemination, legal and regulatory, and trustworthy technology.

Public validation

A first public validation workshop on the topic of "Enhancing eID and trust services market analysis" was held on 20 April 2017 at the premises of the European Commission. The interim outcome was presented and deep-dive panels were organised. The panels addressed market analysis, current issues and initiatives, and way forward.

A second public validation workshop was organised on the topic of "Study on a marketing plan to stimulate the take-up of eID and trust services for the Digital Single Market". It was held on 3 October 2017, also at the premises of the Commission.

Participants and Commission's feedback from both workshops was analysed and integrated into the deliverables.

Description of tasks and deliverables

The study analysed the market for eID and trust services and put forward suggestions on how to "market" eIDAS services. The assessment of the existing market (together with first insights regarding the impact of the eIDAS Regulation right after its entry into application) has helped develop a marketing plan aiming at tackling the remaining obstacles to the use of eID and trust services by citizens and businesses. The study comprised four tasks.

Task 1 Enhance eID and Trust Service market analysis

This task contained activities that provided a description and understanding of the market and its trends, as well as an identification of initiatives to stimulate the take-up rate. Furthermore, high potential initiatives were identified and recommendations were formulated.

Task 2 Marketing plan to stimulate the uptake of eID and Trust Services

This task contained activities that performed a communication diagnostic, and developed an adoption strategy and tactics. The final activity in this task was the creation of a marketing plan.

Task 3 Input for the activities related to the European eIDAS Observatory

This task included a variety of activities, addressing an analysis of stakeholder involvement in the eIDAS Observatory, the gathering of evidence-based contributions and data, and the identification of regulatory hurdles.

Task 4 Project and stakeholder management

This task comprised the activities related to project management including creation and follow-up of the project plan, the preparation of the various reports and deliverables, the communication with stakeholders and the organisation of the validation sessions with these stakeholders.

Deliverables

The following deliverables were produced in the course of the project:

- Enhancing eID and trust services' market analysis
- Marketing plan to stimulate take-up of eID and trust services
- Input for the activities related to the development of the eIDAS European Observatory

Furthermore, there were various complementary deliverables including the Inception report, the Stakeholder's consultation report, interim study and (interim and final) progress reports and minutes of specialised ad hoc meetings.

Enhancing eID and trust services' market analysis

The eID and Trust Services market is structured as illustrated in the figure below.

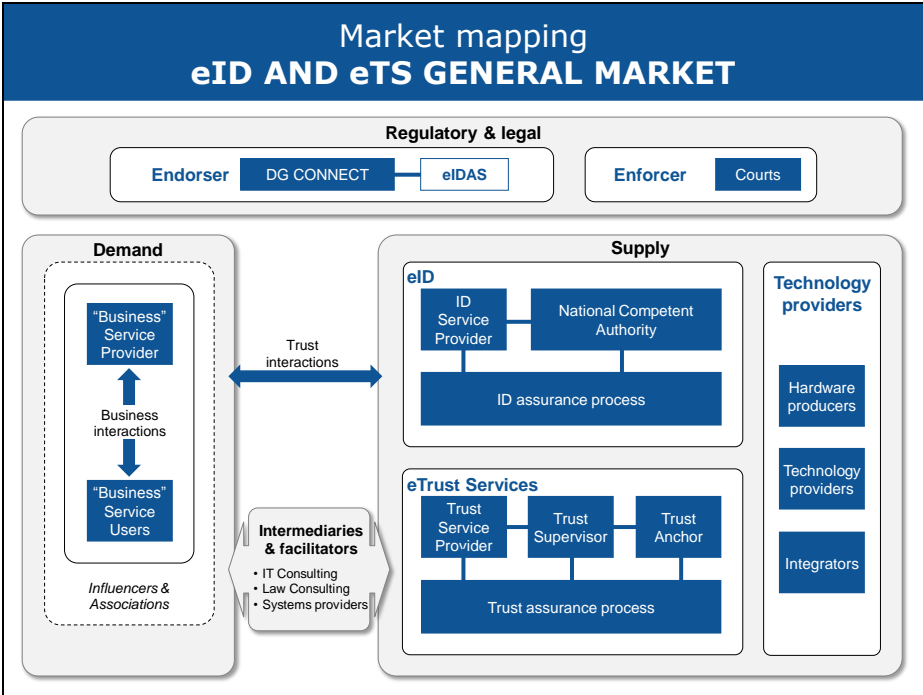


Figure 1 eIDAS market structure

Actors on the demand side conduct 'Trust Interactions' with the supply side actors. The demand side is composed of 'users' of the eID and TS solutions. They can be grouped into two categories. The 'Business' Service Providers that buy and integrate the eID and TS solutions in their activities in order to conduct Business Interactions with the 'Business' Service Users. Business Service Providers can be from the private world such as banks, insurances companies or car rental companies, or from the public world such as ministries, hospitals or universities. Business Service Users are citizens, consumers or companies.

The supply side is composed of ID service providers' whose activities are overseen by a National Competent Authority in charge of managing the identity life-cycle of natural and legal persons in a given Member State. The proper management of eID is granted by an ID assurance process, and also managed at the Member State level. The supply side further contains Trust Service Providers (TSPs), supervised by a National Supervisory Body. After conformity assessment a TSP's qualification status is communicated through a national Trusted List. All EU MS trusted lists are aggregated at the European level in a List of Trusted Lists. National Accreditation Bodies contribute to the assurance process by accrediting Conformity Assessment Bodies who will audit TSP conformity with eIDAS.

Stakeholder consultation

Data was collected in a combination of desk research and sixteen interviews conducted between May and July 2016. Furthermore 107 actors in the eID and TS market participated in a survey performed in October 2016. The main topics that emerged from this consultation were the following. Regarding the maturity of eID and TS, the landscape is highly diverse across the EU. Nevertheless, it is fair to say that eID and TS are both

'supply-driven' markets, since the maturity of the suppliers is significantly higher than that of the business service providers. Regarding adoption barriers, the most important barrier that was mentioned was the legal complexity. Regarding the Regulation's implementation status, the Regulation was well perceived by all market players, but its implementation is considered to remain complex. Regarding expected support for compliance and adoption, the market expected clearer guidelines on how to implement the Regulation as well as guidance on how to comply with its demands. Finally, it was observed that in general, most players prefer written documents as the means for information exchange, followed by events at the national level to disseminate information.

Market KPIs

To measure the impact and success of initiatives to boost eID and TS adoption, 24 market key performance indicators were defined. These included KPIs on eID adoption and implementation (8 KPIs, including the number of notified eID schemes and the uptake in eGov and financial services applications), as well as on TS adoption and implementation (7 KPIs, including the number of Qualified Trust Service Providers and Trust Services, and the number of Qualified Certificates issued). Furthermore KPIs on general interest on maturity and eIDAS' services (4 KPIs, including the maturity level of deployed trust services and the interest for the EU Trust Mark) were defined, as well as indirect KPIs related to digitalisation of the economy and society were put forward (5 KPIs, including eBanking and eInvoicing use, as well as eIDAS value in supporting cross border sales).

Marketing plan to stimulate take-up of eID and trust services

The marketing plan was built on four pillars (the promotion of a development infrastructure, the development of awareness and trust in the market, support for the development of applications, and the use of enablers) and contained a total of 19 marketing actions.

The marketing plan is structured into general, demand-oriented and supply-oriented actions. Given the market analysis revealed the eIDAS market to be mainly a supplier-driven market, the majority of activities focuses on the demand-side. This includes a.o. the increase of awareness (particularly amongst SMEs) and the facilitation of eIDAS-related education. Also raising the interest of business service providers in using providers that carry the EU Trust Mark, the stimulation of the use of Qualified Web Authentication Certificates (QWACs) and the facilitation of adoption by the private sector are addressed. Regarding the supply-side, the increased use of the EU Trust Mark by Qualified Trust Service providers, the stimulation of the uptake by the development of killer apps, and the consolidation of eIDAS documentation were included.

Input for the activities related to the development of the eIDAS European Observatory

Regarding the eIDAS European Observatory, a strategy was developed to improve the engagement of stakeholders. This included an inbound strategy (search engine advertising, use of customer relationship management, use of notifications), a proposal for improved structure and features of the observatory, and an outbound strategy (including the use of search engine optimisation and social networks, as well as the management of press relations).

Finally a list of potential topics for further discussion was presented, including a.o. leveraging the eIDAS model on a larger scale, and the possible role of blockchain in electronic identification and trust service delivery.

European Commission

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Luxembourg, Publications Office of the European Union

2018 – 7 pages

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Publications Office

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