

Digital Economy and Society Index¹ 2016²

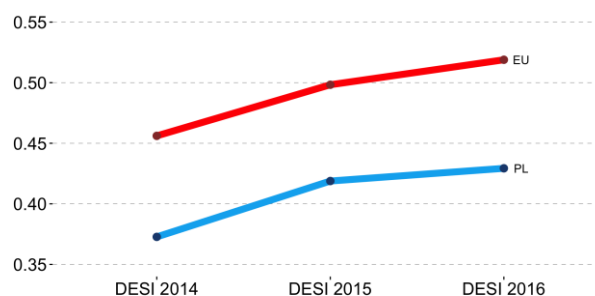
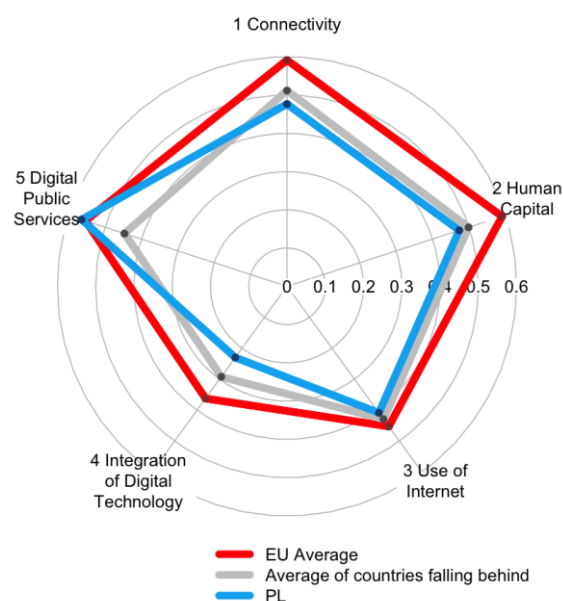
Country Profile

Poland

In DESI 2016, Poland has an overall score³ of **0.43** and ranks **22nd** out of the 28 EU Member States. Poland progressed moderately in four out of five DESI dimensions. Although many Poles opt for mobile broadband (94 out of 100) placing Poland on the 5th place in the EU, only 57% of households have fixed broadband internet connection (26th in the EU) and Poland ranks last in the fixed broadband coverage. Compared to other EU citizens Poles are hesitant in going online; with only 65% of regular internet users Poland ranks 24th in the EU. This might be caused by lack of digital skills. With only 40% of individuals having basic digital skills Poland ranks 24th in the EU. Active eGovernment use remains relatively low with only 22% of Internet users returning filled-in forms (21st in the EU).

In DESI 2016 Poland falls into the cluster of **falling-behind**⁴ as it shows slower pace of catching-up compared to its DESI performance between 2014 and 2015.

	Poland		Cluster	EU
	rank	score	score	score
DESI 2016	22	0.43	0.44	0.52
DESI 2015	22	0.42 ⁵	0.44	0.5



¹ The Digital Economy and Society Index (DESI) is a composite index developed by the European Commission (DG CNECT) to assess the development of EU countries towards a digital economy and society. It aggregates a set of relevant indicators structured around 5 dimensions: Connectivity, Human Capital, Use of Internet, Integration of Digital Technology and Digital Public Services. For more information about the DESI please refer to <http://ec.europa.eu/digital-agenda/en/digital-agenda-scoreboard>

² The DESI 2016 is constructed from indicators referring mostly to the calendar year 2015 (except when data is not available for that calendar year, in which case the latest prior data was used).

³ DESI scores range from 0 to 1, the higher the score the better the country performance.

⁴ In the DESI 2016, the falling-behind cluster of countries comprises Bulgaria, Cyprus, Czech Republic, Greece, France, Hungary, Poland and Slovakia.

⁵ The DESI 2015 was re-calculated for all countries to reflect updates and corrections to the underlying indicator data (which took place between May 2015 and January 2016). As such, country scores and rankings may have changed from the previous publication. For further information please consult the DESI methodological note.

1 Connectivity

1 Connectivity	Poland		Cluster	EU
	rank	score	score	score
DESI 2016	24	0.48	0.51	0.59
DESI 2015	24	0.44	0.5	0.57

In the area of Connectivity Poland's performance moderately improved compared to 2015. With its Connectivity Score of 0.48 Poland remains at 24th place in the EU.

	Poland				EU DESI 2016 value
	DESI 2016		DESI 2015		
	value	rank	value	rank	
1a1 Fixed BB Coverage % households	86% (Jun 2015) ↑	28	85% (Dec 2014)	28	97% (Jun 2015)
1a2 Fixed BB Take-up % households	57% (2015) ↓	26	60% (2014)	23	72% (2015)
1b1 Mobile BB Take-up Subscribers per 100 people	94 (Jun 2015) ↑	5	87 (Dec 2014)	5	75 (Jun 2015)
1b2 Spectrum % of the target for spectrum to be harmonised at EU level	82% (Dec 2015) ↑	7	81% (Dec 2014)	6	69% (Dec 2015)
1c1 NGA Coverage % households, out of all households	61% (Jun 2015) ↑	24	53% (Dec 2014)	24	71% (Jun 2015)
1c2 Subscriptions to Fast BB % of subscriptions >= 30Mbps, out of fixed BB subscriptions	30% (Jun 2015) ↑	18	23% (Dec 2014)	20	30% (Jun 2015)
1d1 Fixed BB Price % individual gross income spent for the cheapest standalone Fixed Broadband subscription (lower values are better)	1.1% (Access cost 2015, Income 2014) →	9	1.1% (Access cost 2014, Income 2014)	8	1.3% (Access cost 2015, Income 2014)

While Poland performs poorly in the field of fixed broadband coverage and take-up, it ranks high among the EU countries in the use of mobile broadband. The discrepancy between both take-up indicators increased between 2015 and 2016. Although fixed broadband prices significantly declined between 2014 and 2015, Polish citizens demonstrate strong preference for mobile solutions.

Fixed broadband coverage is at a very low level. With 86% of households, compared to EU average of 97%, Poland remains in last place among the EU countries. The high level of take-up of mobile broadband shows that there is a demand for fast Internet and that the supply side has to be improved (4th generation (LTE) mobile networks were available to 76% of households in June 2015; which despite an increase, compared to last year, is still below the EU average). Better availability of broadband is likely to have a positive effect on the overall economy.

2 Human Capital

2 Human Capital	Poland		Cluster score	EU score
	rank	score		
DESI 2016	22	0.47	0.5	0.59
DESI 2015	20	0.46	0.48	0.58

With a Human Capital score of 0.47 Poland ranks 22nd among the EU countries.

	Poland				EU DESI 2016 value
	DESI 2016 value	rank	DESI 2015 value	rank	
2a1 Internet Users % individuals (aged 16-74)	65% (2015) ↑	24	63% (2014)	23	76% (2015)
2a2 Basic Digital Skills % individuals (aged 16-74)	40% (2015)	26	n.a.	-	55% (2015)
2b1 ICT Specialists % employed individuals	3% (2014) ↓	19	3.1% (2013)	18	3.7% (2014)
2b2 STEM Graduates Graduates in STEM per 1000 individuals (aged 20 to 29)	n.a.	-	18 (2012)	10	n.a.

The share of citizens using the Internet regularly increased since last year but, (with only 65% of internet users) Poland ranks 24th among the EU countries. This is probably due to low level of digital skills, as the percentage of individuals with at least basic digital skills (40%) remains way below the EU average of 55%.⁶

Also in the fields of ICT specialists' education and employment there is still a room for improvement. Although Poland's STEM (science, technology, engineering, mathematics) graduates level is higher than the EU average, Poland with its only 3% share of ICT specialists (among employed individuals) ranks at the 19th place in the EU.

⁶ 27% of Polish citizens have never used the Internet

3 Use of Internet

3 Use of Internet	Poland		Cluster score	EU score
	rank	score		
DESI 2016	22	0.41	0.43	0.45
DESI 2015	23	0.4	0.42	0.43

With almost unchanged Use of Internet Score of 0.41 Poland ranks 22nd among the EU countries.

	Poland				EU DESI 2016 value
	DESI 2016		DESI 2015		
	value	rank	value	rank	
3a1 News % individuals who used Internet in the last 3 months (aged 16-74)	69% (2015) ↓	20	71% (2014)	18	68% (2015)
3a2 Music, Videos and Games % individuals who used Internet in the last 3 months (aged 16-74)	41% (2014)	25	41% (2014)	25	49% (2014)
3a3 Video on Demand % households that have a TV	44% (2014)	10	44% (2014)	10	41% (2014)
3b1 Video Calls % individuals who used Internet in the last 3 months (aged 16-74)	41% (2015) →	17	41% (2014)	15	37% (2015)
3b2 Social Networks % individuals who used Internet in the last 3 months (aged 16-74)	61% (2015) ↑	23	55% (2014)	24	63% (2015)
3c1 Banking % individuals who used Internet in the last 3 months (aged 16-74)	46% (2015) ↓	22	49% (2014)	19	57% (2015)
3c2 Shopping % individuals who used Internet in the last year (aged 16-74)	53% (2015) ↑	17	49% (2014)	17	65% (2015)

Comparison of DESI 2015 and DESI 2016 readings shows very little change in number of individuals who were active online in Poland. While interaction with social networks (61% of internet users) and online shopping (53% of internet users) increased, online news consumption (69% of internet users) and banking (46% of internet users) decreased. Video calls level remained flat at 41% of internet users.

Consumption of audio-visual content using broadband connections (through video on demand – 44%) is above the EU average (rank 10). Poland performs poorly in music, videos and games consumption (rank 25) and in social networks usage (rank 23).

4 Integration of Digital Technology

4 Integration of Digital Technology	Poland		Cluster score	EU score
	rank	score		
DESI 2016	25	0.23	0.29	0.36
DESI 2015	26	0.21	0.31	0.33

In Integration of Digital Technology by businesses Poland scores 0.23 (up from 0.21 last year) and ranks 25th. Despite of small increase, Integration of Digital Technology remains the weakest DESI indicator for Poland.

	Poland				EU DESI 2016 value
	DESI 2016		DESI 2015		
	value	rank	value	rank	
4a1 Electronic Information Sharing % enterprises (no financial sector, 10+ employees)	21% (2015) ↓	25	22% (2014)	23	36% (2015)
4a2 RFID % enterprises (no financial sector, 10+ employees)	2.8% (2014)	22	2.8% (2014)	22	3.8% (2014)
4a3 Social Media % enterprises (no financial sector, 10+ employees)	8.4% (2015) ↑	27	8.1% (2014)	23	18% (2015)
4a4 eInvoices % enterprises (no financial sector, 10+ employees)	14% (2015)	10	n.a.	-	n.a.
4a5 Cloud % enterprises (no financial sector, 10+ employees)	4.4% (2015) ↑	27	3.5% (2014)	27	n.a.
4b1 SMEs Selling Online % SMEs (no financial sector, 10+ employees)	9.6% (2015) ↑	22	9.3% (2014)	22	16% (2015)
4b2 eCommerce Turnover % turnover of SMEs (no financial sector, 10-249 employees)	n.a.	-	n.a.	-	9.4% (2015)
4b3 Selling Online Cross-border % SMEs (no financial sector, 10+ employees)	3.8% (2015) ↑	25	3.3% (2013)	27	7.5% (2015)

The digitalisation of Polish businesses is lagging behind. With the exception of the eInvoices indicator, for all the other Integration of Digital Technology indicators Poland score is below the EU average.

In cloud (4.4%) and in social media (8.4%) use by enterprises Poland was ranked as second to the last in the EU. Furthermore social media use and electronic information shearing contracted compared to last year. Polish businesses will have to catch up in the field of digital technology integration to be able to profit from its efficiency-enhancing potential.

5 Digital Public Services

5 Digital Public Services	Poland		Cluster score	EU score
	rank	score		
DESI 2016	15	0.56	0.45	0.55
DESI 2015	12	0.61	0.47	0.54

Although in Digital Public Services Poland's EU rank remained higher than for other DESI dimensions, with a Digital Public Services score of 0.56 Poland slid down from 12th to 15th rank compared to last year.

	Poland				EU DESI 2016 value
	DESI 2016		DESI 2015		
	value	rank	value	rank	
5a1 eGovernment Users % individuals returning filled forms, out of Internet users in the last year (aged 16-74)	22% (2015) ↑	21	21% (2014)	21	32% (2015)
5a2 Pre-filled Forms Score (0 to 100)	63 (2015) ↓	11	68 (2014)	9	49 (2015)
5a3 Online Service Completion Score (0 to 100)	80 (2015) ↑	18	78 (2014)	15	81 (2015)
5a4 Open Data Score (0 to 700)	370 (2015) ↓	15	490 (2014)	7	351 (2015)

Modern online public services may have a positive impact on reduction of public spending as well as on efficiency and transparency in an interaction between enterprises, individuals and public administration. Poland's performance in Digital Public Services is lagging behind the EU average and worsened compared to last year. Unsettling is a decrease in Pre-filled Forms availability (from 68% in 2014 to 63% in 2015) as well as in the publication of the Open Data (from 490 in 2014 to 370 in 2015).