



European
Commission

The Digital Single Market

State of Play

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1. What has been achieved?

Digital technology and our response to it is an issue of paramount strategic, economic and social importance. The effect of digital is now so pervasive we can no longer think in terms of a separate ICT sector, but rather all aspects of economic and social life having a digital dimension. As a consequence to this development, since May 2015 the European Union has been delivering on **an ambitious and comprehensive Digital Single Market Strategy**. By mid-September 2017, the European Commission had put forward 38 policy initiatives, 23 of which are legislative proposals.

Digital Single Market – State of Play

✓ 38 policy initiatives,
23 of which are
legislative proposals

✓ Further actions on:

- Online Platforms
- High-Performance Computing
- & more



The Strategy is built around (i) improving access to goods, services and content; (ii) creating the appropriate legal framework for digital networks and services, and (iii) reaping the benefits of a data-based economy. It has been estimated that the Strategy could contribute €415 billion per year to the EU economy and create hundreds of thousands of new jobs, consequently it would be hard to understate the importance of timely implementation¹.

The 3 Pillars of the DSM Strategy

Better access
for consumers
and businesses

Geoblocking

E-commerce

Copyright

Parcel delivery

Advanced
digital networks
and innovative
services

Telecom market

Media services

Platforms and intermediaries

Trust and security

Enhance the
digital economy

Data economy

Inclusive digital
economy and society

Interoperability and
standardisation

Digitisation of European Industry

¹ European Parliament Research Service, *Mapping the cost of Non-Europe, 2014-19*, 2015.

Some of the Digital Single Market's key initiatives have already been adopted by the European Parliament and Council. Those include:

Content portability,

which, as of early 2018, will allow Europeans to travel with the films, the music or the e-books they have purchased or subscribed to at home.

Roaming, which, from 15 June 2017, ended roaming surcharges for subscribers in one Member State travelling in another.

Spectrum coordination, which releases the 700 MHz band for the development of 5G and new online services

Implementation of the **Marrakesh Treaty** which facilitates access to published works for persons who are blind, visually impaired, or otherwise print disabled

The **WiFi4EU initiative,** which will provide free public Wi-Fi hotspots in local communities across the EU.

The implementation of non-legislative initiatives is ongoing, often in close cooperation with Member States and other stakeholders.

For example, under the **Digitising European Industry initiative,** the Commission is working closely with Member States and industry to build a critical mass of initiatives and investments. Since the launch of the initiative in April 2016, the allocated investments so far (€100 million) have provided support for more than 150 digital innovation hubs.

They, in turn, support 600 innovation experiments and more than 1200 Startups, SMEs and mid-caps in their digital transformation. Initial results show a significant return on investments for SMEs.

Digital Skills and Jobs Coalition – 70 organisations have already pledged action under this multi-stakeholder collaboration launched in December 2016 to boost digital skills across the EU. Many Member States have also taken an active part. Today there are 17 National Digital Skills Coalitions connecting public authorities, business, education, training and labour market stakeholders.

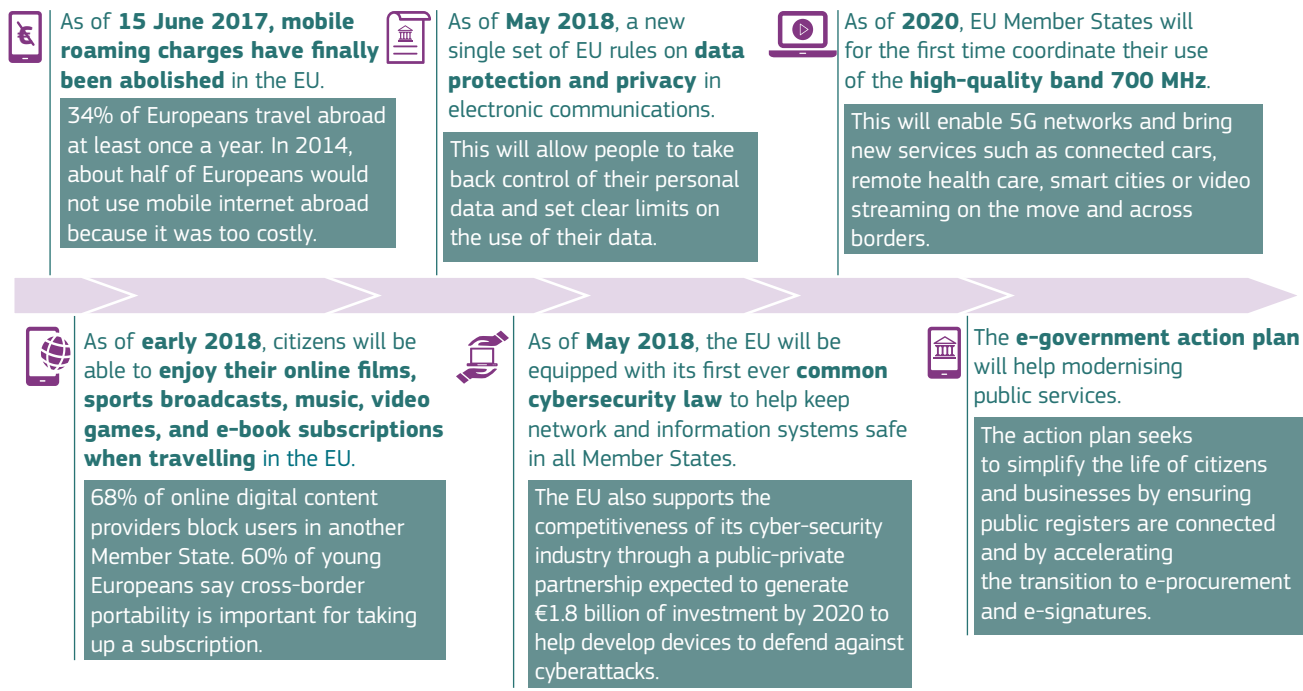


2. What will be achieved over the next 18 months?

While solid progress has been made, there is still much more to do to achieve a fully integrated Digital Single Market in Europe.

Legislative negotiations are still ongoing on a number of key proposals under the Digital Single Market Strategy (e.g. tackling unjustified geo-blocking, copyright reform, telecom reform and update of the audio-visual media framework). The European Council has repeatedly committed to implementing the Digital Single Market Strategy by December 2018. This will require the pace of the negotiations to be increased.

Since May 2015, EU decision-makers have achieved the following:



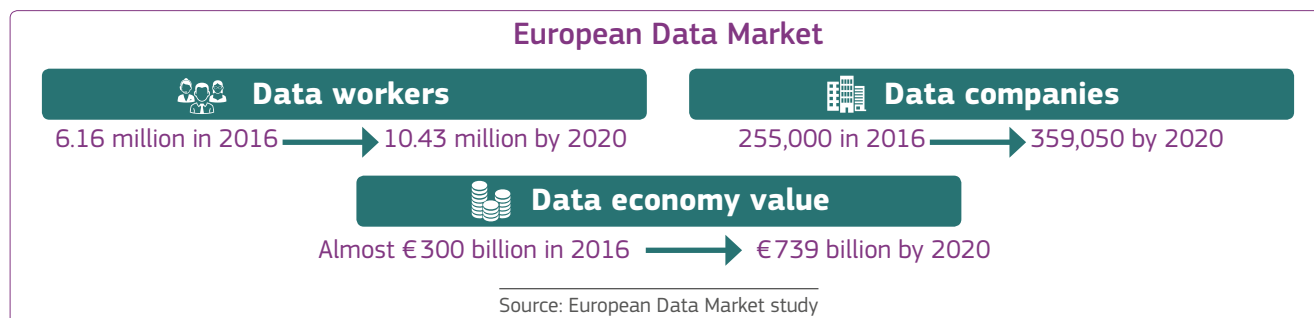
All proposals under negotiation are crucial for unlocking important benefits of the Digital Single Market². The rules on e-privacy, digital contracts and geoblocking will provide EU citizens with some of the highest standards of consumer protection in the world. The new rules on audiovisual and media services and copyright will tear down barriers in cross-border content access. Through the adoption of new, investment-friendly telecoms rules, Europe will be a step closer to achieving its aim of global leadership in affordable, ubiquitous high capacity broadband connectivity across the EU. This seamless and ubiquitous connectivity is a prerequisite for many valuable digital innovations (connected mobility, high performance computing, digital health, etc.).

The Commission will continue putting forward initiatives that will further strengthen the Digital Single Market. In September 2017, two essential pieces of the Digital Single Market were adopted: a Regulation on the **free flow of non-personal data** and a cybersecurity package, including a revised European Cybersecurity Strategy and a European Cybersecurity Agency.

Data as a catalyst for growth

Data is at the core of the digital economy and ensuring its free flow throughout the European Union is essential. But simply gathering data and allowing it to flow freely is not, of itself, enough – we need to be able to capture its value, and this will require the capacity to analyse, interpret and extract value from data through the help of high performance computing. Without this, Europe will have to rely on processing power from third countries, thus missing out on one of the biggest sources of economic growth in the foreseeable future (the value of the data economy could reach €739 billion by 2020 – 4% of EU GDP³).

The European Commission has recently adopted a **legislative proposal on the free flow of non-personal data**. A proposal on a legal instrument that provides a procurement framework for high performance computing will follow by the end of 2017. By Spring 2018, an initiative on accessibility and re-use of public and publicly funded data will be prepared.



² Digital Single Market – Policy initiatives, table at the end of this publication, page 7.

³ European Data Market Study SMART 2013/0063, available at: <http://datalandscape.eu/>.

Protecting businesses and citizens in the digital environment

Ensuring EU wide cybersecurity will be one of the most important challenges of the next decade. The ever increasing number and severity of cyberattacks requires a strong and coordinated response at European level. A [revised Cybersecurity Strategy](#) was presented this September. It proposes measures to increase resilience and improve our response in the face of cyberthreats. This is accompanied by a permanent mandate for ENISA, the EU Cybersecurity Agency, which will assist Member States in effectively preventing and responding to cyber-attacks.

In addition to the cybersecurity challenge, future initiatives on online platforms will aim to rebalance the relationship between platforms and their suppliers, as well as protect citizens from illegal content. By the end of 2017, the Commission will propose initiatives on unfair contractual clauses in platform-to-business relationships, as well as on addressing removal of illegal content online.



Managing the digital transformation of economy and society

A thriving economy is built on creativity and innovation as the engines for creating jobs and adding value. The fundamental transformation of entire economic sectors will continue. Rather than trying to oppose this trend, the European Commission aims to anticipate and successfully manage the new digital revolution as it transforms sectors such as health, finance or automated transport (a package of proposals for the future of transport was adopted in May 2017). Overall, the combined economic impact of the automation of knowledge, work, robots and autonomous vehicles is estimated to reach between €6.5 trillion and €12 trillion annually by 2025⁴.

Governments have a crucial role to play in the digital economy. Trust is the bedrock of business and consumer confidence in embracing the transition to digital. Streamlined and frictionless interactions with public authorities throughout the EU, as is the objective of the [EU eGovernment Action Plan](#), are essential. At the same time, European, national and regional efforts to improve the overall level of digital skills for European citizens must continue. The [New Skills Agenda](#) will foster a better use of the available skills and equip our citizens with the new skills that are needed to help them find quality jobs and improve their life chances.



The European Commission will adopt its [Strategy on digital health and care](#) by the end of 2017, and will update the eGovernment action plan to keep up with digital development. To complement ongoing initiatives on the digital skills, a *Digital Opportunity* pilot scheme to give graduates experience in the digital domain will be launched.

⁴ Disruptive technologies: Advances that will transform life, business, and the global economy; McKinsey Global Institute, 2013.

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Pillars	Policy initiatives	Legal act(s)	2015		2016		2017		2018
			2nd Sem	1st Sem	2nd Sem	1st Sem	2nd Sem	1st Sem	
Improving access to goods, services and content	Geo-Blocking	X							
	Digital contracts I – supply of digital content	X							
	Digital contracts II – online sales of goods	X							
	Reduce VAT burden for eCommerce	2X							
	Parcel delivery	X							
	Consumer protection cooperation	X							
	Report on eCommerce sector inquiry								
	Unfair Commercial Practices Directive Guidance								
	Cross-border portability of online content services	X							
	A modern copyright framework	X							
Creating the appropriated legal framework for digital networks and services	Directive on Copyright in the DSM	X							
	Copyright Regulation (following SatCab review)	X							
	Marrakesh Treaty implementation (Directive & Regulation)	2X							
	Spectrum – UHF band (470-790 MHz)	X							
	Decision on the use of the 470-790 MHz band								
	Audiovisual Media Services Directive	X							
	Online platforms								
	Wholesale Roaming	X							
	European Agenda for Collaborative Economy								
	BEREC Regulation	X							
Reaping the benefits of the data-based economy	European Electronic Communications Code	X							
	WiFi4EU initiative	X							
	Towards a Gigabit Society Communication (incl. Connectivity targets)								
	5G Action Plan								
	ePrivacy	X							
	Cyber Security	X							
	Digitising European industry								
	Building a European Data Economy								
	Free Flow of Data initiative	X							
	Accessibility and re-use of public and publicly funded								
	EU eGovernment Action Plan 2016-2020								
	Single digital gateway	X							
	ICT Standardisation priorities								
	European Interoperability framework								
	New Skills Agenda for Europe								
	Digital skills								
	Digital Opportunities scheme								
	European Open Science Cloud								
	European Cloud initiative								
	High Performance Computing								
	Digital Health and Care								

 Commission Initiative adopted
 Commission Initiative to come
 Adoption in Parliament and Council (agreement reached)

