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From: Secretary-General of the European Commission,  
signed by Mr Jordi AYET PUIGARNAU, Director

date of receipt: 23 July 2014

To: Mr Uwe CORSEPIUS, Secretary-General of the Council of the European  
Union

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No. Cion doc.: SWD(2014) 242 final - PART 5/23

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Subject: COMMISSION STAFF WORKING DOCUMENT Accompanying the  
document COMMUNICATION FROM THE COMMISSION Sixth report on  
economic, social and territorial cohesion: Investing in Europe's Future

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Delegations will find attached document SWD(2014) 242 final - PART 5/23.

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Encl.: SWD(2014) 242 final - PART 5/23



Brussels, 23.7.2014  
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PART 5/23

**COMMISSION STAFF WORKING DOCUMENT**  
*Accompanying the document*

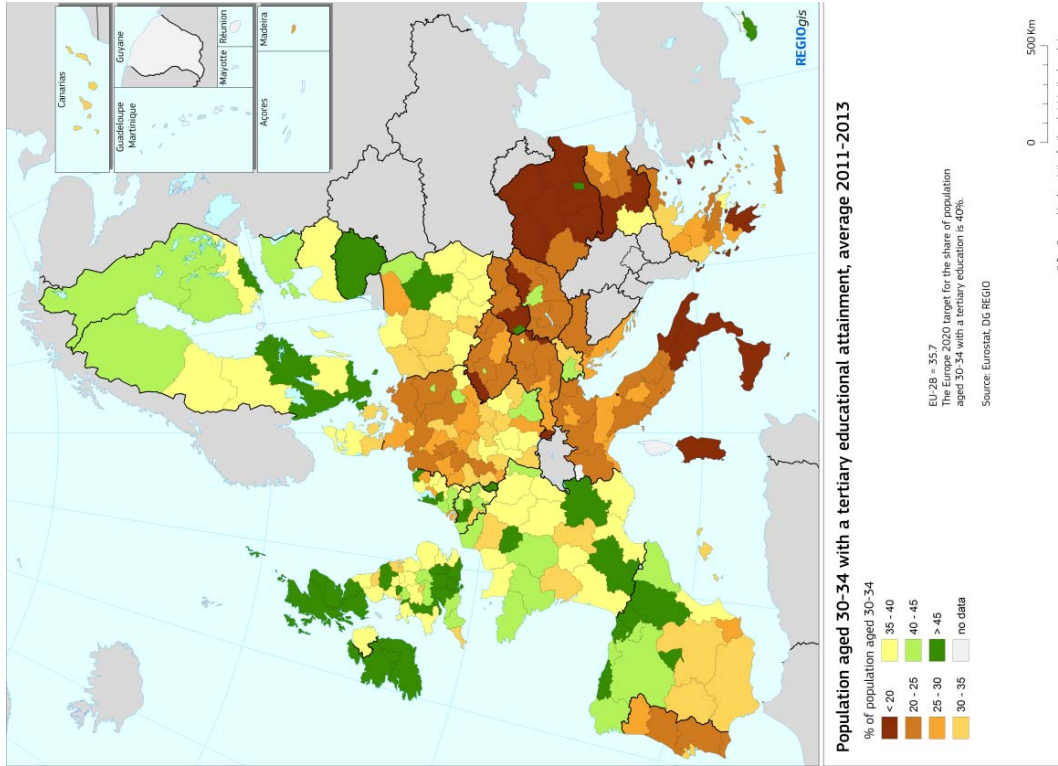
**COMMUNICATION FROM THE COMMISSION**

**Sixth report on economic, social and territorial cohesion: Investing in Europe's Future**

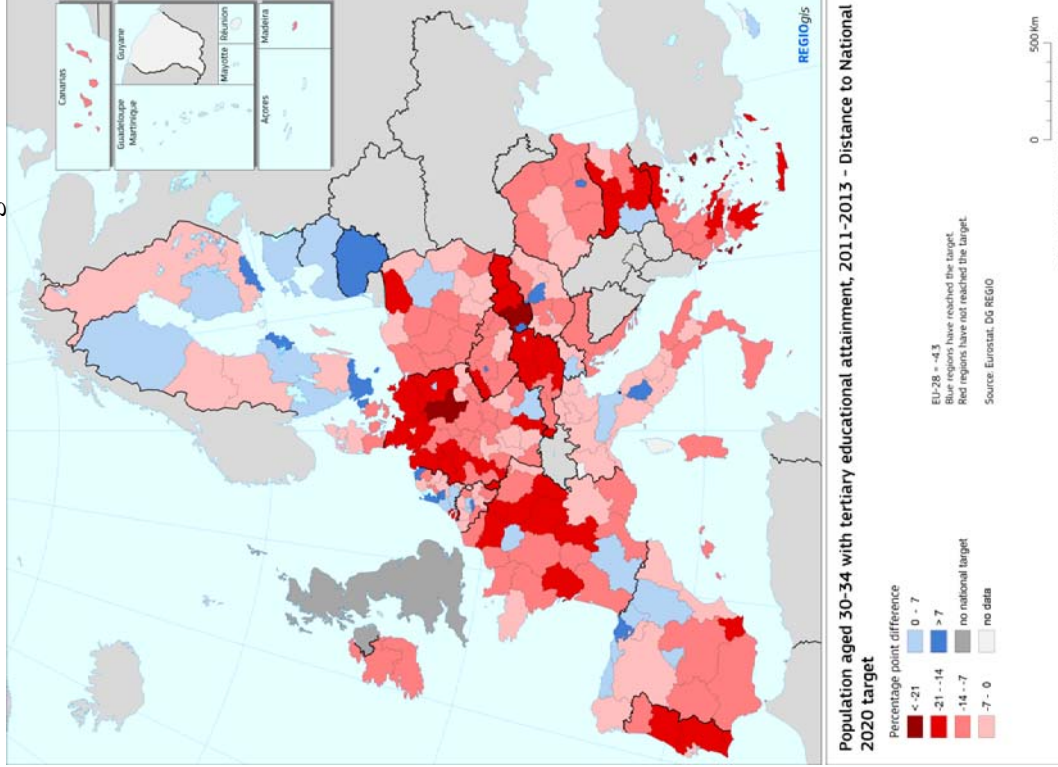
{COM(2014) 473 final}

Map 1 Population aged 30-34 with a tertiary educational attainment, 2011-

13



Map 2 Population aged 30-34 with high educational attainment 2011-13  
Distance to national 2020 target



## **10. GAPS IN THE DIGITAL AND TRANSPORT NETWORKS ARE BEING FILLED, BUT MORE REMAINS TO BE DONE**

### **10.1. Digital networks are spreading, but unevenly**

Access to high capacity telecommunication networks is a key factor of competitiveness and economic growth. The provision of digital services and the capacity to operate successfully in a global business environment increasingly rely on fast and effective broadband connections. ICT infrastructure is therefore a major determinant of the development potential of EU regions. The most prosperous regions are in general already well-endowed in this regard, though there are still serious gaps in many of the less prosperous ones.

The extent of broadband coverage has increased significantly in the EU in recent years. In 2012, 96% of households in the EU-27 had access to at least one fixed broadband network<sup>1</sup>, while, as regards wireless technologies, High Speed Packet Access (HSPA) is available to 95% of them and there is full coverage of high capacity KA-band satellite broadband in all but four Member States (Estonia, Latvia, Lithuania and Sweden). However, coverage is much higher than take-up and in 2012 only around 70% of households with access (67% of the total) had a fixed broadband subscription.

Disparities are also pronounced between regions, especially urban and rural ones. In 2012, 9.1 million homes in the EU still did not have fixed broadband coverage and over 90% of these were in rural areas. Coverage was below 40% in such areas in Poland and Bulgaria. Coverage is almost complete in most urban areas and cities, though there are a number of areas with a coverage of below 90%, most of them in northern parts of Sweden and Finland and in southern and Eastern Europe, and a few where it is below 75%, all of them in Poland.

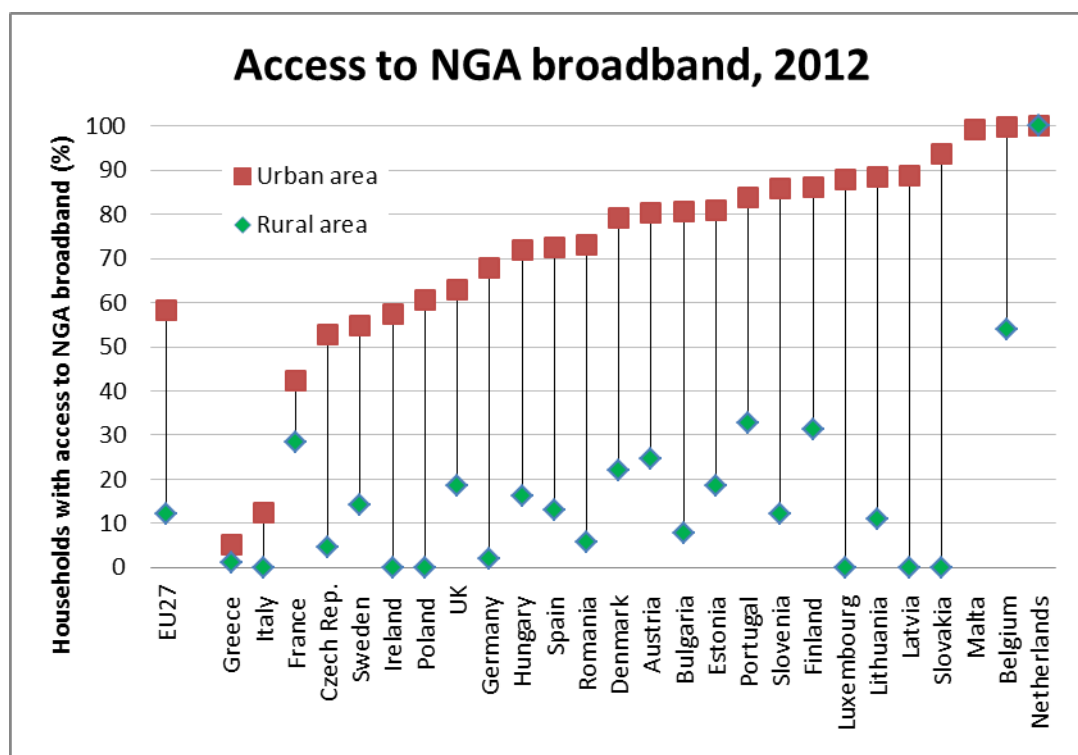
The gap is much wider for Next Generation Access<sup>2</sup> (NGA) (figure 16). In 2011, 78% of rural households in the EU had access to standard broadband but only 12% to NGA. Contrary to the situation for standard broadband, regions lagging behind are mostly located in the EU15 Member States. While coverage is at or near 100% in the Netherlands, Belgium and Malta, it is below 40% in France, Ireland, Italy, Greece, Poland and Cyprus. There is no access to NGA for homes in rural areas in Luxemburg., Ireland, Italy, Cyprus, Slovakia, Latvia and Poland and only marginal coverage in Germany.

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<sup>1</sup> See COMMUNICATIONS COMMITTEE, 2012, *Broadband lines in the EU: situation at 1 July 2012* ([https://ec.europa.eu/digital-agenda/sites/digital-agenda/files/COCOM%20Broadband%20July%202012%20final\\_0.pdf](https://ec.europa.eu/digital-agenda/sites/digital-agenda/files/COCOM%20Broadband%20July%202012%20final_0.pdf)).

<sup>2</sup> Next Generation Access Networks is wired access networks which consist wholly or in part of optical elements and which are capable of delivering broadband access services with enhanced characteristics (such as higher throughput) as compared to those provided over already existing copper networks.

Figure 1: NGA broadband coverage, 2012  
 (% of rural and urban population with NGA)



Household take-up of broadband has increased significantly in recent years along with coverage. While in 2009, only around 56% of households in the EU had a broadband subscription, the figure was more than 76% in 2013. However, large differences remain between regions (see Map 21). In Severozapaden (Bulgaria), Kentriki Ellada, Nisia Aigaiou Kriti (Greece) and Nord-Est (Romania), the take-up rate was below 50% in 2013 while in Flevoland, Utrecht (Netherlands), London, South West (UK), Helsinki-Uusimaa (Finland) and Bremen, it was over 90%.

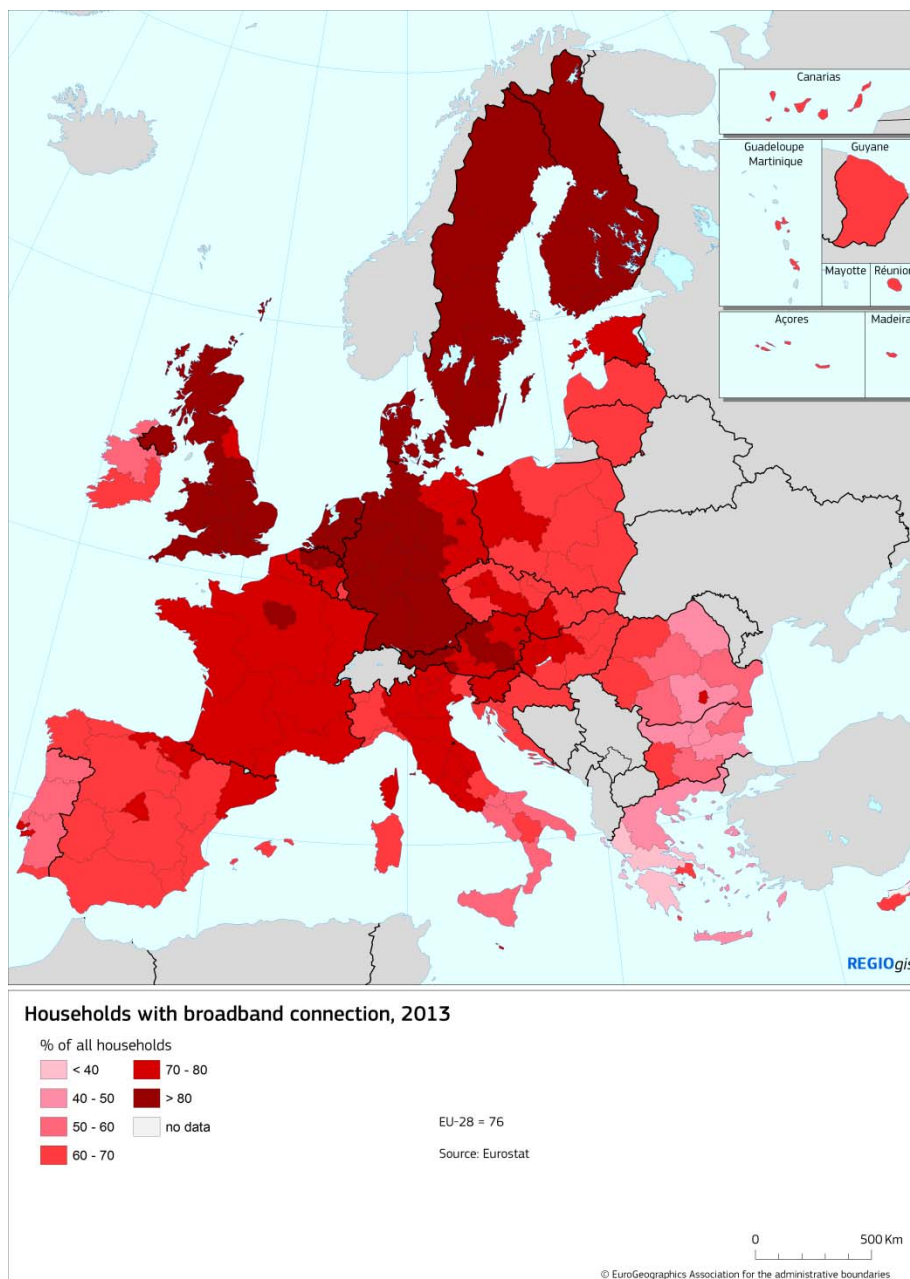
The same picture emerges for businesses. Between 2010 and 2013, the proportion of companies with 10 or more persons employed in the EU-28 with a broadband subscription increased from 84% to 90%. In Finland, France and Denmark, the take-up rate was over 96%. By contrast, the take up rate was just below 80% in Bulgaria, Greece, Croatia and Poland and only 61% in Romania.

### *Box on the digital agenda*

ICT is estimated to have accounted for half of productivity growth in the EU in the first decade of the present century<sup>3</sup>. Development of ICT networks is, therefore, important for economic cohesion in the Union as less developed regions tend to lag behind in broadband access. The goals of the digital agenda for 2020 are (1) that the entire EU population should be covered by fast broadband (over 30 Mbps), (2) that at least half the EU population use broadband with a speed of 100 Mbps or more and (3) to double public investment in ICT R&D.

<sup>3</sup> See European digital report, 2010

**Map 3: Households with a broadband connection, 2013**



## **10.2. Road network in central and eastern member states still considerably less developed**

In 1955, only a few links of the TEN-T core road network allowed people to travel at an average speed of over 80km per hour (see map). The vast majority of links had an average speed of below 70 km an hour. In 1970, the situation had improved substantially with many links in Germany, Italy, the Benelux and the UK having average speeds of over 80 km per hour though few or none at all in the rest of the EU, including in the central and eastern countries.

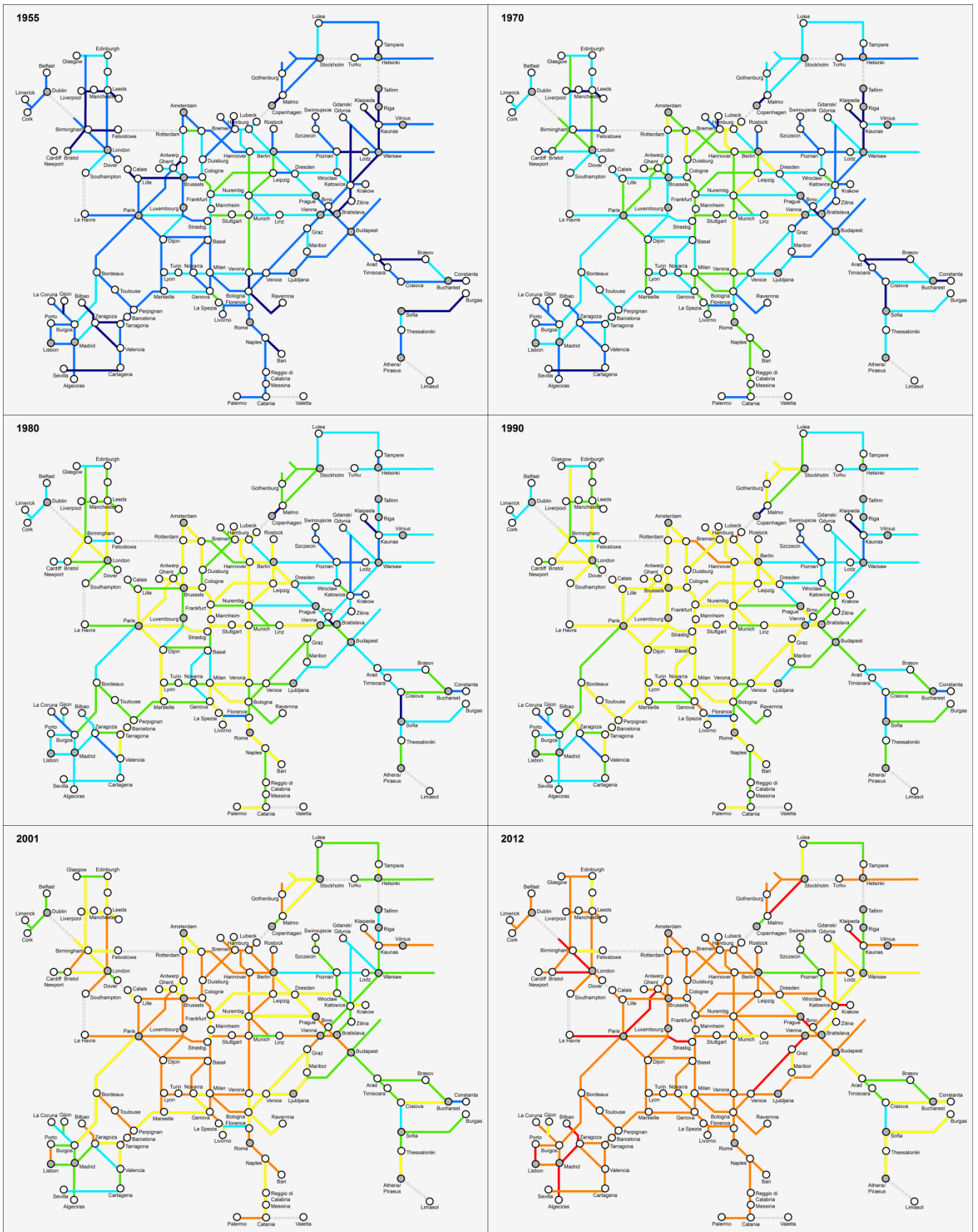
The gap between the north-west of Europe plus Italy and the rest had widened further by 1980, with many links in the former having an average speed of over 90 km per hour. Portugal, Greece and the central and eastern Member States did not have a single link with an average speed of over 80 km per hour and some had speeds of below 60. In Spain, the only link with a speed of over 80 km per hour was Valencia to Barcelona.

By 1990, average speeds increased further but the gaps between countries remained. By 2000, the average speed in Greece, Spain and Portugal had risen substantially, on some links reaching over 100 km per hour. By 2012, speeds on the links in Spain and Portugal had caught up with those in the highly developed Member States. These improvements in the speed of the main road network in these three countries have been largely financed by Cohesion Policy.

Speeds on the links in Poland, the Baltic States, Romania and Bulgaria, however, remained slow compared to the rest of the EU. The full implementation of the TEN-T core road network by 2030 would increase the average speeds significantly particularly in the central and eastern Member States. Both Cohesion Policy funding and the new Connecting Europe Facility are targeted at the implementation of the multimodal TEN-T core network.

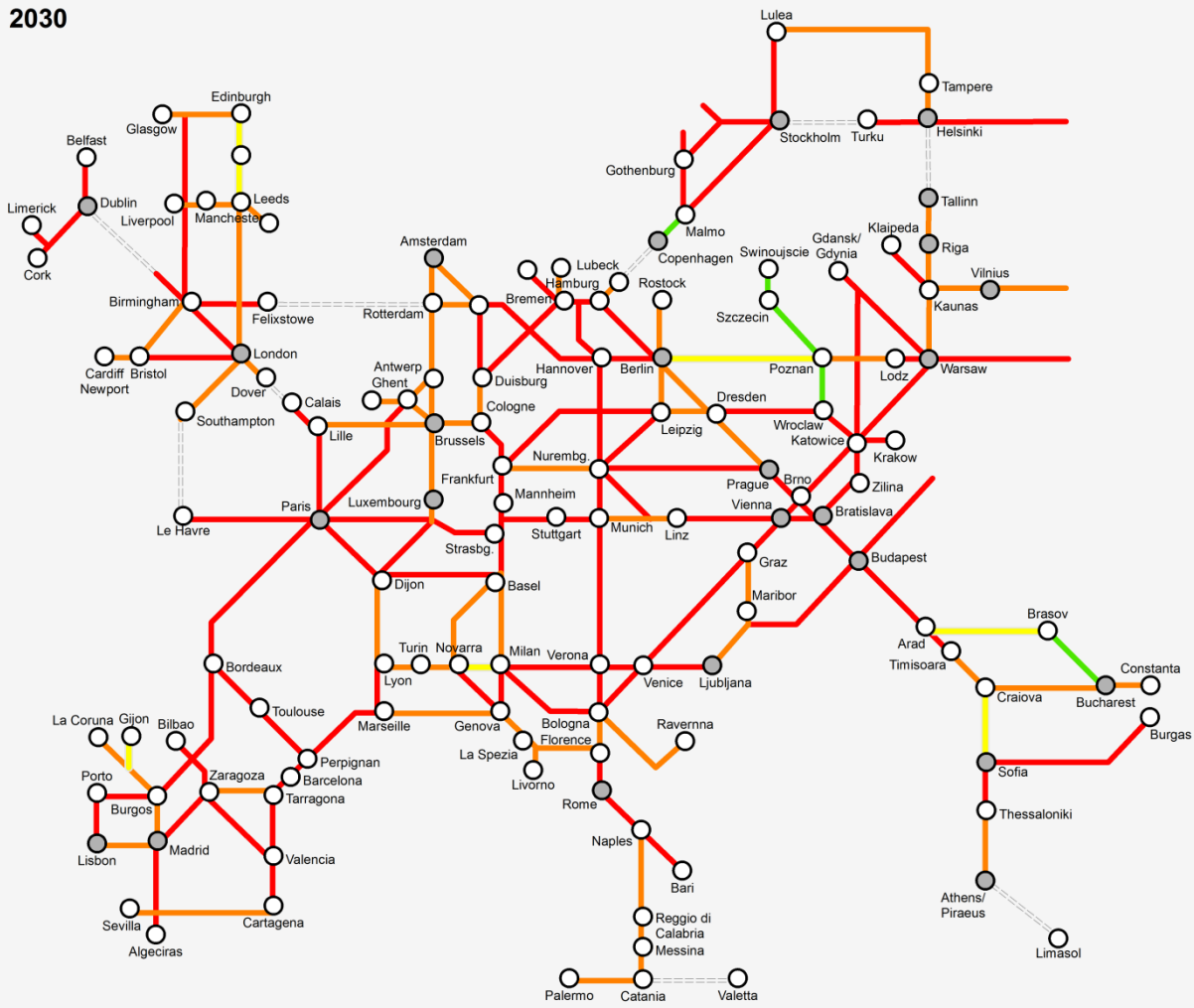


**Map 4: Travel speed on the core TEN-T road network, 1955-2030**





2030



**Average travel speed along the core network**

- 45 - 59
- 60 - 69
- 70 - 79
- 80 - 89
- 90 - 99
- 100 - 109
- 110 - 119

Average speed in Km/h

Source: (Stelder et al, 2013), JRC IPTS and REGIO calculations

