Digital performance of Italy

Broadband markets

At the end of 2013, fixed broadband covered 99% of homes in Italy (97% in the EU). In rural areas, fixed broadband covered 88% of homes. At the same time, Next Generation Access capable of providing at least 30 Mbps download was available to 21% of homes (62% in the EU).

68% of the households had a broadband subscription at the end of 2013, lower than the EU average (76%) but 13 percentage points higher than at the end of 2012. The share of high speed connections (providing at least 30 Mbps) was lower than the EU average (1% compared to 21% in the EU). There was no ultra-fast connection (providing at least 100 Mbps).

On the mobile side, 4th generation (LTE) was available to 39% of population (compared to 10% in 2012). The take-up rate (subscription per 100 people) of mobile broadband was 66%, above the EU average of 62%.

Indicator (including breakdown and unit)	Italy value		EU28 value
	2012	2013	2013
Fixed broadband coverage - Total (in % of total population)	98	99	97
Rural fixed broadband coverage – Total (in % of rural population)	87	88	90
NGA broadband coverage - Total (in % of households)	14	21	62
Households with a broadband subscription - All households (in % of households)	55	68	76
Share of subscriptions with at least 30Mbps - (% of subscriptions)	0	1	21
Share of subscriptions with at least 100Mbps - (% of subscriptions)	0	0	5
4G Mobile broadband coverage - (as a % of total population)	10	39	59
Mobile broadband take-up - Total (in Subscriptions per 100 people)	57	66	62

Internet usage

In 2013, 56% of Italians reported using the internet at least weekly (regular users), well below the EU average of 72%. Italy exhibited lower rates of daily use of the internet (frequent users), with 54% of the population reporting going online every day, compared to an EU average of 62%. In 2013, 34% of the population had still never used the internet; lower than in 2012 and significantly higher than the EU average of 20%.

Indicator (including breakdown and unit)	Italy value		EU28 value
	2012	2013	2013
Internet users going on-line weekly (Regular internet users - All individuals, in % of individuals)	53	56	72
Internet users on a daily basis (Frequent internet users - All individuals, in % of individuals)	51	54	62
Individuals who have never used the internet - All individuals (in % of individuals)	37	34	20

Digital skills

Results obtained from a newly developed Digital Skills Indicator[1] show that, in 2012, 60% of Italians had low or no digital skills, compared to 47% for the EU average. Disadvantaged people (i.e. individuals who are aged 55-74, low educated and/or unemployed, retired or inactive) in Italy are less highly digitally skilled than is average in the EU. Within the workforce, skills are higher; 50% of the workforce has low or no digital skills. On average in the EU, the figure is 39%. At 37% in 2012, figures for households without internet access reporting lack of skills as a reason for no access are higher than the EU average of 35%. According to a broad definition, the share of ICT specialists in total employment in Italy was 2.4% in 2012; about the same as the EU average of 2.8%.[2]

Indicator (including breakdown and unit)	Italy value		EU28 value	
	2012	2013	2012	2013
Individuals with low or no digital skills (in % of individuals)	60	-	47	-
Disadvantaged people with low or no digital skills (in % of disadvantaged people)	75	-	64	-
Labour force with low or no digital skills (in % of labour force)	50	-	39	-
Households reporting lack of skills as a reason for having no Internet access (in % of households without internet access)	37	-	35	37
Persons Employed with ICT Specialist Skills (broad definition) - Total (in % of persons employed)	2.4	-	2.8	-

eCommerce

In 2013, 20% of Italians had purchased goods or services online within the previous 12 months, which means that take-up of e-Commerce was well below the EU average of 47%. Italy exhibited worse rates of cross-border e-Commerce, with 7% of the population having bought online from other EU countries in the previous 12 months, compared to an EU average of 12%. In 2013, 16% of large enterprises were selling on-line, fewer than in 2012 and significantly fewer than the EU average of 35%. SMEs were significantly less active with only 5% of SMEs selling online, fewer than the EU average of 14%.

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[1] The Digital Skills Indicator is a composite indicator of digital skills based on the IPTS Digital Competence Framework and using data collected through the Eurostat survey on Internet use in households and by individuals. The indicator has been developed as part of the work towards action 62 of the Digital Agenda to propose EU-wide indicators of digital competence. http://ec.europa.eu/information_society/newsroom/cf/dae/document.cfm?action=display&doc_id=5406

[2] Broad definition taken from JRC (IPTS) "The evolution of EU ICT employment 2000-2012" Technical report (forthcoming): ISCO codes 25 and 35, plus ICT graduates in certain adjacent ISCO codes.

Indicator (including breakdown and unit)	Italy value		EU28 value
	2012	2013	2013
Ordering goods or services online - All individuals (in % of individuals)	17	20	47
Cross-border e-Commerce - All individuals (in % of individuals)	5	7	12
Enterprises selling online - Large enterprises (in % of enterprises)	20	16	35
Enterprises selling online - SMEs (10-249 persons employed) (in % of enterprises)	4	5	14
Enterprises purchasing online - Large enterprises (in % of enterprises)	28	25	-
Enterprises purchasing online - SMEs (10-249 persons employed) (in % of enterprises)	14	15	-

eGovernment

In 2013, 21% of Italians made use of the internet for eGovernment services, an increase from 19% in 2012 and much below the EU average of 41%. 10% of citizens sent filled-in forms, up from 8% in 2012, and much below the EU average. On the supply-side, the newly introduced User-centric eGovernment Indicator[3] was at 75 in 2012-2013, above the EU average of 70, and the Transparent eGovernment Indicator[4] was at 49, the same as the EU average of 49.

Indicator (including breakdown and unit)	Italy value		EU28 value
	2012	2013	2013
Citizens' use of eGovernment services, last 12 months - All individuals (in % of individuals)	19	21	41
Citizens sending filled forms to eGov services, last 12 months - All individuals (in % of individuals)	8	10	21
User-centric eGovernment Indicator - (0-100 range)	75		70[5]
Transparent eGovernment Indicator - (0-100 range)	49		49[6]

[3] The User-Centric eGovernment Indicator is a composite indicator measuring the availability of eGovernment services, their connectedness and their user-friendliness for seven areas of government services through a user journey approach using the concept of life event (well defined user need).

[4] The Transparent eGovernment Indicator is a composite indicator measuring the online transparency of governments on the different aspects of online service delivery, treatment of citizens' personal data and activities of the public administrations. The indicator has been measured over seven areas of government services through a user journey approach using the concept of life event (well defined user need).

[5] The indicator is measured over a two-year period, figures refer to 2012-2013

[6] See note above

eHealth

In 2013, 39% of Italian hospitals had a broadband connection >50Mbps, above the EU average of 36%. 56% of hospitals exchange clinical information with external healthcare providers or professionals, which is above the EU average of 55%. For General Practitioners, the rate is 31%, higher than the EU average of 28%. 27% of hospitals provide patients access to the totality or part of their medical records, which is much higher than the EU average (9%).

Indicator (including breakdown and unit) for acute[7] hospitals	Italy value		EU28+2[8] value
	2010	2013	2013
Broadband connection > 50Mbps (in % of hospitals)	33	39	36
Exchange of clinical care information with external health care providers (in % of hospitals)	41	56	55
Online access (partial or total) to electronic records by patients (in % of hospitals)	7	27	9
Indicator (including breakdown and unit) for General Practitioners (GPs)	**2007**	**2013**	**EU28+3[9] value**
Use of a computer during consultation with the patient (in % of GPs)	81	99	97
Exchange of medical patient data with other health care providers or professionals (in % of GPs)	7	31	28
Electronic storage of individual medical patient data - (in % of GPs)	69	90	83

Research and Development (R&D) in ICT

In 2010, Business Expenditure in R&D (BERD) by the ICT sector in Italy amounts to €2177mn, about the same as the year before. BERD by the ICT sector represents 21% of total BERD, above the EU average of 17%. Total BERD is 0.7% of GDP, below the EU average of 1.2%. In 2012, Public funding in R&D (GBAORD) in the ICT sector amounts to €520mn representing 5.9% to total GBAORD, below the EU average of 6.6%.

Indicator (including breakdown and unit)	Italy value				EU27/28 value			
	2009	2010	2011	2012	2009	2010	2011	2012
ICT BERD – Million €	2139	2177	-	-	25368	25993	-	-
ICT BERD - % of Total BERD	21	21	-	-	17	17	-	-
Total BERD - % GDP	0.7	0.7	-	-	1.2	1.2	-	-
ICT GBAORD – Million €	612	546	499	520	5958	6044	6118	5962
ICT GBAORD - % of Total GBAORD	6.3	5.7	5.6	5.9	6.5	6.5	6.6	6.6

[7] Hospitals intended for short-term medical or surgical treatment and care

[8] Iceland and Norway

[9] Iceland, Norway and Turkey

Participation to the EU-funded Seventh Framework Programme for Research (FP7) in ICT

Over the period 2007-2013[10] the EU co-funded projects in Italy in the ICT domain (FP7 Cooperation ICT Theme and e-infrastructures within Capacities) for a cumulated total of €828 million. Overall 655 Italian organisations participated in 1,250 projects (so represented in 52% of all projects) and coordinated 322 projects.

In 2013 participation from higher education/research organizations was at 61% of funding, below the EU average (66%). Industrial participation was at 35%, higher than the EU average (29%), with 22% of total funding going to large enterprises and 14% to SMEs.

Participation (in terms of share of total funding) is higher in the following Strategic Objectives: FET, Cognitive Systems and Robotics and Future Networks and Internet.

Indicator	Italy value		EU28 value
	2012	**2013**	**2013**
Participations	338	**405**	3,493
Total EU funding to FP7 ICT projects – All organisations (Million €)	111.11	**157.75**	1,350
N. of organisations	178	**200**	1,780
New entries – All organisations (% of organisations)	41%	**43%**	41%
N. of SME participations – Total	59	**78**	679
N. of SME participations - % of total participations	17%	**19%**	19%
Funding by organisation type - % of EU funding			
SMEs	14%	**14%**	16%
Higher education/research organisations (HES/REC)	58%	**61%**	66%
Large enterprises	24%	**22%**	13%
Other organizations	3%	**4%**	4%

[10] Data for the period 2007 – 2013 (it considers grants signed up to December 2013).

Top 50 Italian organisations by funding, 2007 - 2013 (cumulated figures)

#	Organisation	Type	EU funding (€)	% of IT total cumulated EU funding
1	CONSIGLIO NAZIONALE DELLE RICERCHE	HES/REC	60,051,423	7.2%
2	POLITECNICO DI MILANO	HES/REC	31,612,841	3.8%
3	SCUOLA SUPERIORE DI STUDI UNIVERSITARI E DI PERFEZIONAMENTO SANT'ANNA	HES/REC	26,061,934	3.1%
4	STMICROELECTRONICS SRL	LARGE	25,021,584	3.0%
5	FONDAZIONE ISTITUTO ITALIANO DI TECNOLOGIA	HES/REC	23,160,908	2.8%
6	ENGINEERING - INGEGNERIA INFORMATICA SPA	LARGE	22,616,200	2.7%
7	TELECOM ITALIA S.p.A	LARGE	19,647,879	2.4%
8	CENTRO RICERCHE FIAT SCPA	HES/REC	19,351,712	2.3%
9	FONDAZIONE BRUNO KESSLER	HES/REC	18,558,318	2.2%
10	ALMA MATER STUDIORUM-UNIVERSITA DI BOLOGNA	HES/REC	18,039,587	2.2%
11	UNIVERSITA DEGLI STUDI DI ROMA LA SAPIENZA	HES/REC	18,008,431	2.2%
12	CONSORZIO INTERUNIVERSITARIO CINECA	HES/REC	18,004,026	2.2%
13	UNIVERSITA DEGLI STUDI DI TRENTO	HES/REC	17,685,670	2.1%
14	UNIVERSITA DI PISA	HES/REC	17,449,966	2.1%
15	POLITECNICO DI TORINO	HES/REC	16,361,931	2.0%
16	CONSORZIO NAZIONALE INTERUNIVERSITARIO PER LE TELECOMUNICAZIONI	HES/REC	13,082,890	1.6%
17	ISTITUTO NAZIONALE DI FISICA NUCLEARE	HES/REC	12,451,156	1.5%
18	UNIVERSITA DEGLI STUDI DI PADOVA	HES/REC	11,389,768	1.4%
19	UNIVERSITA DEGLI STUDI DI GENOVA	HES/REC	11,112,202	1.3%
20	CREATE-NET (CENTER FOR RESEARCH AND TELECOMMUNICATION EXPERIMENTATION FOR NETWORKED COMMUNITIES)	HES/REC	10,547,437	1.3%
21	TXT E-SOLUTIONS SPA	LARGE	9,924,855	1.2%
22	C.R.E.A.T.E. CONSORZIO DI RICERCA PER L'ENERGIA E LE APPLICAZIONI TECHNOLOGICHE DELL'ELETTROMAGNETISMO	HES/REC	9,256,140	1.1%
23	ISTITUTO SUPERIORE MARIO BOELLA SULLE TECNOLOGIE DELL'INFORMAZIONE E DELLE TELECOMUNICAZIONI	HES/REC	6,374,736	0.8%
24	UNIVERSITA DEGLI STUDI DI MILANO	HES/REC	6,247,137	0.8%
25	HEWLETT PACKARD ITALIANA SRL	LARGE	5,822,220	0.7%
26	UNIVERSITA DEGLI STUDI DI NAPOLI FEDERICO II.	HES/REC	5,749,206	0.7%
27	SOFTECO SISMAT SRL	LARGE	5,127,121	0.6%
28	UNIVERSITA' DEGLI STUDI DI SIENA	HES/REC	5,082,060	0.6%
29	UNIVERSITA DEGLI STUDI DI VERONA	HES/REC	4,795,075	0.6%
30	UNIVERSITA DEGLI STUDI DI PARMA	HES/REC	4,738,185	0.6%
31	MICRON SEMICONDUCTOR ITALIA SRL	LARGE	4,733,882	0.6%
32	FONDAZIONE SANTA LUCIA	HES/REC	4,648,688	0.6%

33	COMAU SPA	LARGE	4,432,065	0.5%
34	D'APPOLONIA SPA	LARGE	3,847,794	0.5%
35	UNIVERSITA DEGLI STUDI DI MODENA E REGGIO EMILIA	HES/REC	3,840,203	0.5%
36	CONSORZIO INTERUNIVERSITARIO NAZIONALE PER L'INFORMATICA	HES/REC	3,732,030	0.5%
37	NEXTWORKS	LARGE	3,537,400	0.4%
38	EUROTECH SPA	LARGE	3,402,529	0.4%
39	UNIVERSITA DEGLI STUDI DI PAVIA	HES/REC	3,402,415	0.4%
40	FONDAZIONE ISTITUTO PER L'INTERSCAMBIO SCIENTIFICO (I.S.I.)	HES/REC	3,264,345	0.4%
41	UNIVERSITA DEGLI STUDI DI FIRENZE	HES/REC	3,070,495	0.4%
42	UNIVERSITA DEGLI STUDI DI PERUGIA	HES/REC	3,068,938	0.4%
43	UNIVERSITA DEGLI STUDI DI CAGLIARI	HES/REC	2,794,115	0.3%
44	SELEX SISTEMI INTEGRATI SPA	LARGE	2,786,895	0.3%
45	ELSAG DATAMAT S.P.A.	LARGE	2,785,587	0.3%
46	ALCATEL-LUCENT ITALIA S.P.A.	LARGE	2,740,223	0.3%
47	RAI-RADIOTELEVISIONE ITALIANA SPA	LARGE	2,726,025	0.3%
48	UNIVERSITA CA' FOSCARI VENEZIA	HES/REC	2,700,111	0.3%
49	CONSORTIUM GARR	NIL	2,678,892	0.3%
50	CONSORZIO FERRARA RICERCHE	HES/REC	2,605,530	0.3%
	Total		**540,130,760**	**65.2%**
	IT total cumulated EU Funding		***828,432,739***	