



The EU Digital Single Market

F Momboisse, Ecommerce Europe – February 4, 2015





The voice of the e-commerce industry

Representing 25.000+ companies through lobbying, advocacy, and networking



17 National associations



39 Company members



34 Business partners



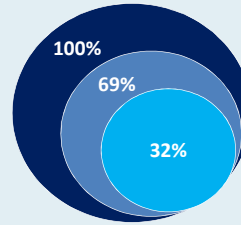
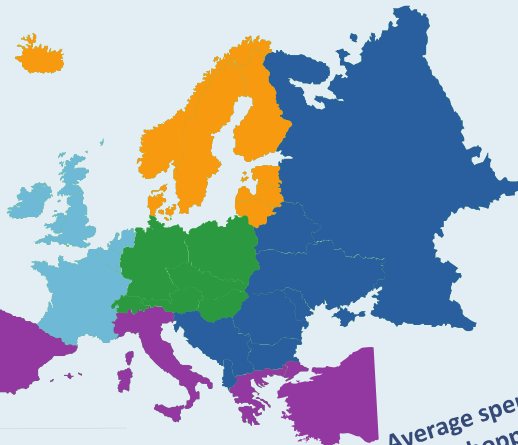
504 Registered web shops



Europe 2013 Key B2C E-commerce Data of Goods and Services at a Glance

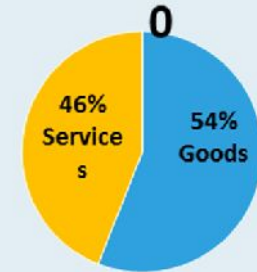


West € 177.7 bn +12.4%
 Central € 93.3 bn +22.7%
 South € 40.8 bn +18.9%
 North € 33.2 bn +12.2%
 East € 19.3 bn +47.3%



816 million people live in Europe
 565 million people use the Internet
 264 million people are e-shoppers

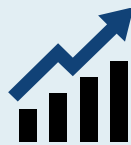
€ 364.3 bn
 Turnover E-commerce Goods & Services



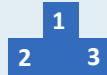
Average spending per e-shopper € 1,376

224 million e-households

Europe € 364.3 bn 17.5%
 EU28 € 317.9 bn 14.7%



2.2% eGDP
 € 16.4 trn GDP 2013



Top 5 mature e-commerce countries in turnover

UK	€ 107.1 bn
Germany	€ 63.4 bn
France	€ 51.1 bn
Austria	€ 10.9 bn
Netherlands	€ 10.5 bn

Top emerging countries

Russia	€ 15.5 bn
Spain	€ 14.4 bn
Italy	€ 11.2 bn
Poland	€ 5.2 bn

UK, Germany, France account for 61% of total e-commerce sales in Europe

2,111,111+ jobs directly or indirectly via e-commerce

645,000+ estimated online businesses

3.7 billion+ number of parcels annually (f)

5.7% Estimated share of online goods in total retail of goods

“443 million social media users”

In cooperation with: GfK

Powered by: globalcollect

informatica Put potential to work:

richrelevance

SALESUPPLY enabling global e-commerce

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The Digital Single Market Strategy

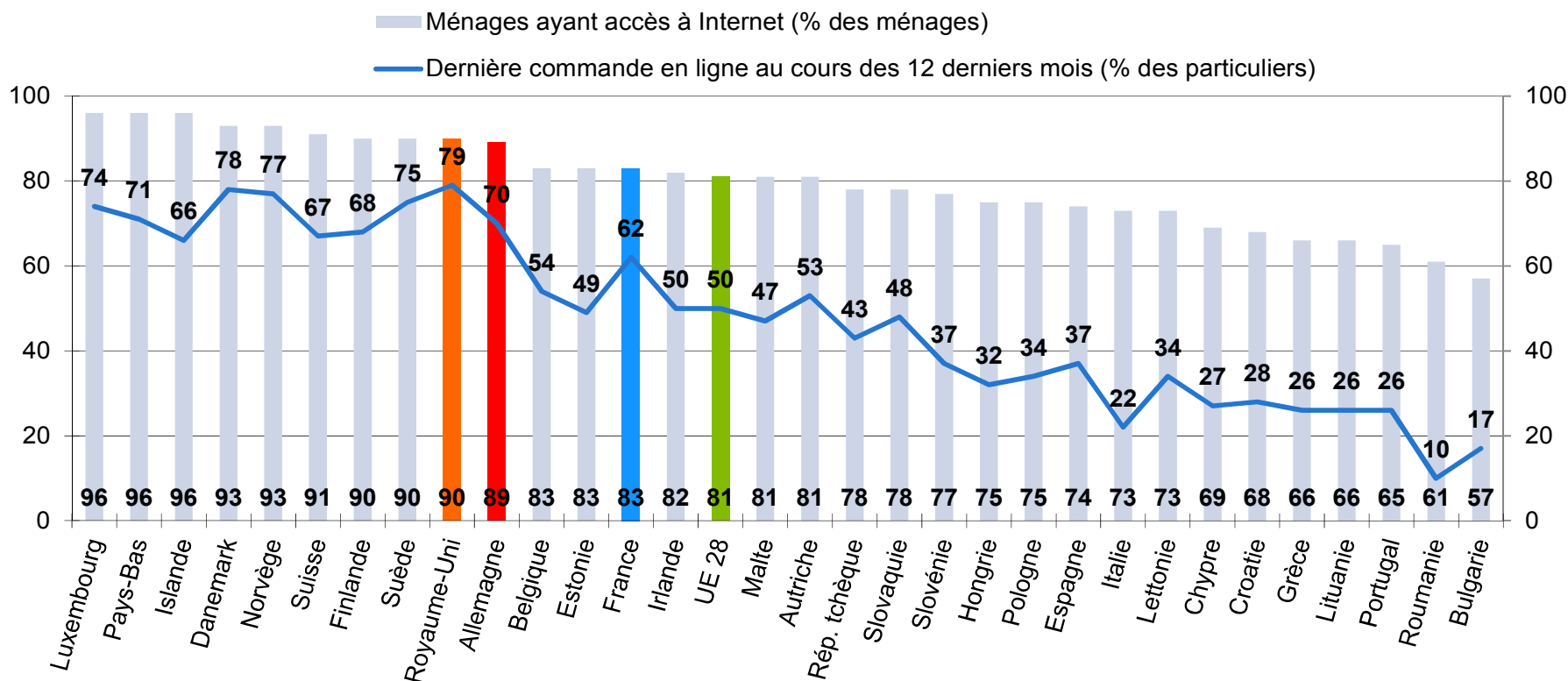
Priorities of DSM:

1. Breaking down national silos in telecoms regulation (copyright / data protection)
2. Finalizing **data protection and preparing a reform of e-privacy** XXX
3. Making **taxation and competition rules conducive** to a higher level of public and private investment and adapt application of competition rules to DSM
4. **Same level** of consumer rules and **simplifying consumer rules** for online purchases XXX
5. Abolish data roaming charges
6. Design framework that drives creation of **innovative start-ups** and promote creative industries
7. Help developments as **the cloud, internet of things and big data thrive** the EU
8. Fight against cybercrime
9. Mobilize public and private investment for digital infrastructure XXX
10. Boosting **digital skills and learning**





Priority #9: digital infrastructure



Source : Fevad à partir des données Eurostat 2014





Ecommerce Europe's vision on DSM

Positive factors:

- Harmonisation of consumer law (thru Consumer Rights Directive) well underway
- Growing number of consumers buying from “foreign” stores, often via the marketplaces of “local” stores
- High growth rate of Ecommerce (Commission estimates 7x that of the rest of economy)

Ecommerce Europe's vision on DSM

Still to be solved:

- Different sets of rules for data protection, contract law, parcel delivery, tax administration, etc.
- “Opening a new country” still a complex operation for webshops
- Different consumer habits (language, payments, local competition, pricings, ..) may lead to lack of trust in cross-border ecommerce



Some concrete examples:

- Uncertainty on foreign privacy laws
- Different VAT rules (15% LUX - 25% SWE)
- Customs bottlenecks
- Differences / extra charges on payments for consumers/online shops
- Slow, costly, unreliable parcel delivery

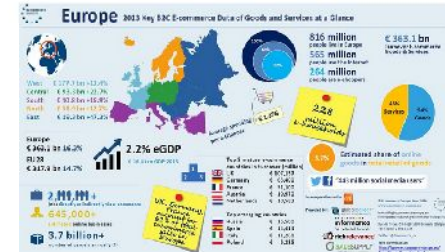




Ecommerce Europe

Your one stop shop for all e-commerce related matters

- Survey Barriers to Growth
- Research reports
- Webportal e-Logistics
- European Trustmark
- Ecommerce Europe Annual Conference





Survey barriers to go cross border

- Large / medium size companies
 - Survey underway across 16 countries
 - Results due early June (presented in Barcelona)
- Small size companies
 - Survey done last december (411 shops, 3 countries F / UK / Spain)
 - Small shops (< 5 employees)
 - 52% sell abroad
 - Top 3 reasons for not going abroad / obstacles seen:
 - 37% logistics: ability to conclude contracts to deliver abroad at a good cost
 - 33% language: ability to translate the web store, to handle customer care in foreign language, ..
 - 28% payments: ability to offer the right payment techniques, suited to the countries



Ecommerce Europe's Priorities DSM

Longer term

1. Harmonization **of existing legal frameworks.**
2. A European **one-stop-shop** on rules for: VAT and Taxation, data protection and privacy, parcel delivery, consumer rights and dispute resolution and online payments.





Ecommerce Europe's Priorities DSM

Short /medium term

1. **Harmonization** of legislation for privacy and security top priority (data protection / e-Privacy).
2. **Simplification of consumer rules** for online purchases and a basis to solve disputes in a simple, fast and low cost way.
3. Clarify European VAT registration through an **extended Mini One Stop Shop** and a **common European threshold**.
4. Strengthen **pan-European action for fair competition**.
5. Conclude the creation of a **pan-European framework for online payments**.
6. Stimulate the **parcel delivery market to innovate, by harmonizing customs regimes** and making their timing more predictable.



Completing the Digital Single Market

An integrated perspective on five key policy areas

- **Internet Security & Data Protection**
Harmonization with room for innovation
- **Consumer Rights**
Simplification, self-regulation, and competition
- **e-Payments**
Focus on mobile and stimulate innovation
- **Taxation**
Harmonize VAT and expand Mini-One-Stop-Shop
- **e-Logistics**
More efficient cross-border parcel delivery





Amazon in Europe: 6 different stores

Homepage Amazon NL Fr De UK Feb 2, 2015, 3pm

The screenshot shows the Amazon.nl homepage. At the top, there is a navigation bar with the Amazon logo, a search bar, and links for account and help. The main content area features several promotional banners. The largest banner is for Kindle deals, with the headline "Nieuw: Kindle-deals van de maand" and "Nederlandse topboeken met minstens 50% korting". Below this, there are smaller banners for "Engelse deals van de maand" and "Kindle Paperwhite". A sidebar on the left lists various product categories like Kindle books, Kindle apps, and Kindle readers.

The screenshot shows the Amazon.de homepage. The navigation bar includes the Amazon logo, a search bar, and links for account and help. The main content area features a large banner for a "70% SALE" on clothing, with the headline "70% SALE" and "Winter Highlights". Other banners include "Kindle Paperwhite" and "Amazon Instant Video". A sidebar on the left lists various product categories like Music-Downloads, App-Shop, and Kindle.

The screenshot shows the Amazon.fr homepage. The navigation bar includes the Amazon logo, a search bar, and links for account and help. The main content area features a large banner for "Le Mois du Blanc" with the headline "Tombez sous le charme kindle paperwhite" and "129€ 99€". Other banners include "Amazon Instant Video" and "Amazon Cloud Drive". A sidebar on the left lists various product categories like Téléchargement de musique, Amazon Cloud Drive, and Jeux et Logiciels Digitaux.

The screenshot shows the Amazon.co.uk homepage. The navigation bar includes the Amazon logo, a search bar, and links for account and help. The main content area features a large banner for a "70% OFF FASHION" sale, with the headline "70% OFF FASHION" and "Winter sale fire HD7". Other banners include "Amazon Instant Video" and "Amazon Cloud Drive". A sidebar on the left lists various product categories like Amazon Instant Video, Digital Music, and Amazon Cloud Drive.

Bestbuy in the USA: 2 different stores

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BEST BUY PRODUCTOS SERVICIOS OFERTAS Iniciar sesión Crear cuenta

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- Computadores y tabletas
- Teléfonos celulares
- Cámaras y videocámaras
- Audio
- Electrónicos para autos y GPS
- Videojuegos, películas y música
- Salud, bienestar y belleza
- Hogar y oficina
- Tecnología ponible

Comprar por marca

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Thank you!

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