

Digitale Souveränität im europäischen Diskurs

26. Salzburger Telekom-Forum

Dr. Peter Stuckmann
DG CONNECT

The 2025 State of the Digital Decade report



The State of the Digital Decade report is the annual report tracking the **EU's progress towards the digital transformation**, highlighting achievements and gaps, while also proposing **concrete, actionable recommendations** to MS.



The 2025 Report also evaluates Member States' adjustment of their **National Digital Decade Strategic Roadmaps**.



The report also gives an overview of **Multi-Country Projects** and monitors the application of the **European Declaration on Digital Rights and Principles**.



**2030
DIGITAL
DECADE**

REPORT ON THE STATE
OF THE DIGITAL DECADE 2025

DATE 2025

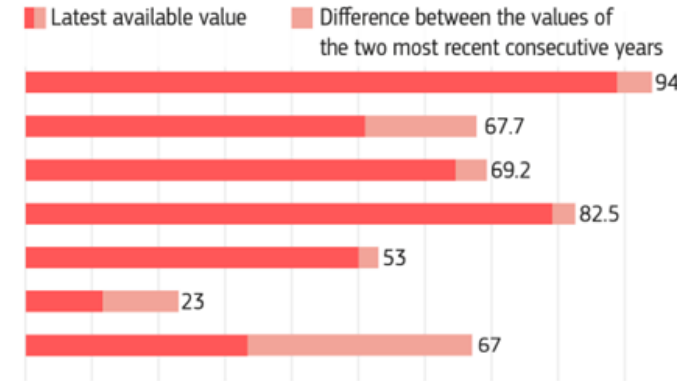


State of the Digital Decade 2025: Progress towards 2030 targets

% of target achieved

DIGITAL INFRASTRUCTURE

Overall 5G coverage
5G coverage in 3.4-3.8 GHz*
Fibre to the Premises
Fixed Very High Capacity Network
Semiconductors
Edge nodes
Quantum computing



2030 TARGET

100% coverage

100% coverage

100% coverage

100% coverage

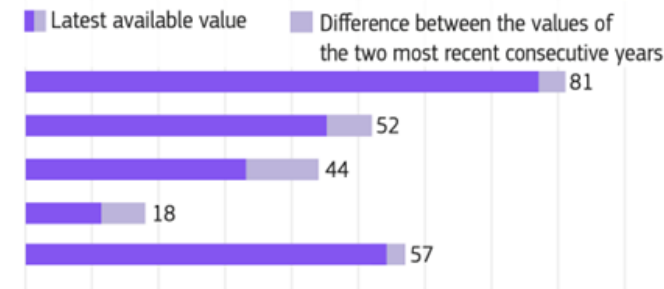
20% of world production value

10 000

3 quantum computers

DIGITAL TRANSFORMATION OF BUSINESSES

SMEs digital intensity
Cloud take-up
Data analytics take-up**
AI take-up
Unicorns



2030 TARGET

90% SMEs

75% enterprises

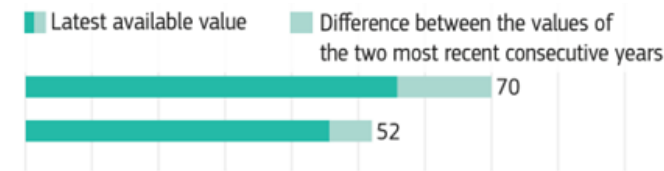
75% enterprises

75% enterprises

500 (2 x 2022 baseline)

DIGITAL SKILLS

Basic digital skills
ICT specialists



2030 TARGET

80% individuals

20 million employed

DIGITAL PUBLIC SERVICES

Digital public services for citizens
Digital public services for businesses
Access to e-health records
eID



2030 TARGET

100/100

100/100

100/100

27 MS with eID notified

State of the Digital Decade report 2025: key messages

- **2025, a pivotal year for action to tackle key challenges** (competitiveness, security and defence, AI).
 - **The DD is in full implementation & is delivering concrete results**, from ambitious national roadmaps, to EDICs, follow-up of 2024 recommendations and exchange of best practices.
 - **We have made progress on some targets & objectives, but progress is still insufficient in key domains** like high-quality connectivity and the adoption of foundational technologies.
- **Structural challenges & new concerns are arising:**
 - Increase security and sovereignty concerns notably linked to excessive dependencies
 - Lack of single market integration
 - Tensions on energy capacity which may affect EU's capacity to develop an AI continent
 - Insufficient pool and persistent shortages of digital specialists and limited progress which undermines long term EU competitiveness
 - Insufficient synergies between civil and defence on critical technologies
- **The time to act is now together – we need to accelerate innovation & scale up strategic technologies**, otherwise we risk **missing out in productivity & growth** (up to 1.8 % GDP)

Technological sovereignty, security, and competitiveness: Some key facts & figures from the State of the Digital Decade report 2025

Concerning the evolution of the global technological race

Europe continues to trail the US and China in digital innovation.

While Europe remains a global hub for scientific exchange, it lacks critical mass of top-performing players.



Gaps persist in advanced connectivity:

Fibre coverage reached 69.2% of households in 2024 (82.5% for VHCN); rural fibre coverage remains low at 58.8%, and only 2% of 5G users are connected via 5G stand-alone infrastructure.



A fragmented start-up ecosystem limits scale-up potential:

The EU reached **286 unicorns in 2024**, still far behind the US (1687) and China (397); at current pace, the 500 unicorns target will not be met before 2034.



Europe's chip ambition requires acceleration:

The EU's semiconductor **market share is 10.5% in 2024**—half the 2030 target. Reaching it would require more than quadrupling current revenues amid fierce global competition.



Cybersecurity readiness remains uneven:

21.5% of EU enterprises reported ICT-related security incidents in 2024; IPv6 adoption stands at 36.4% (user-side), with large disparities across Member States.



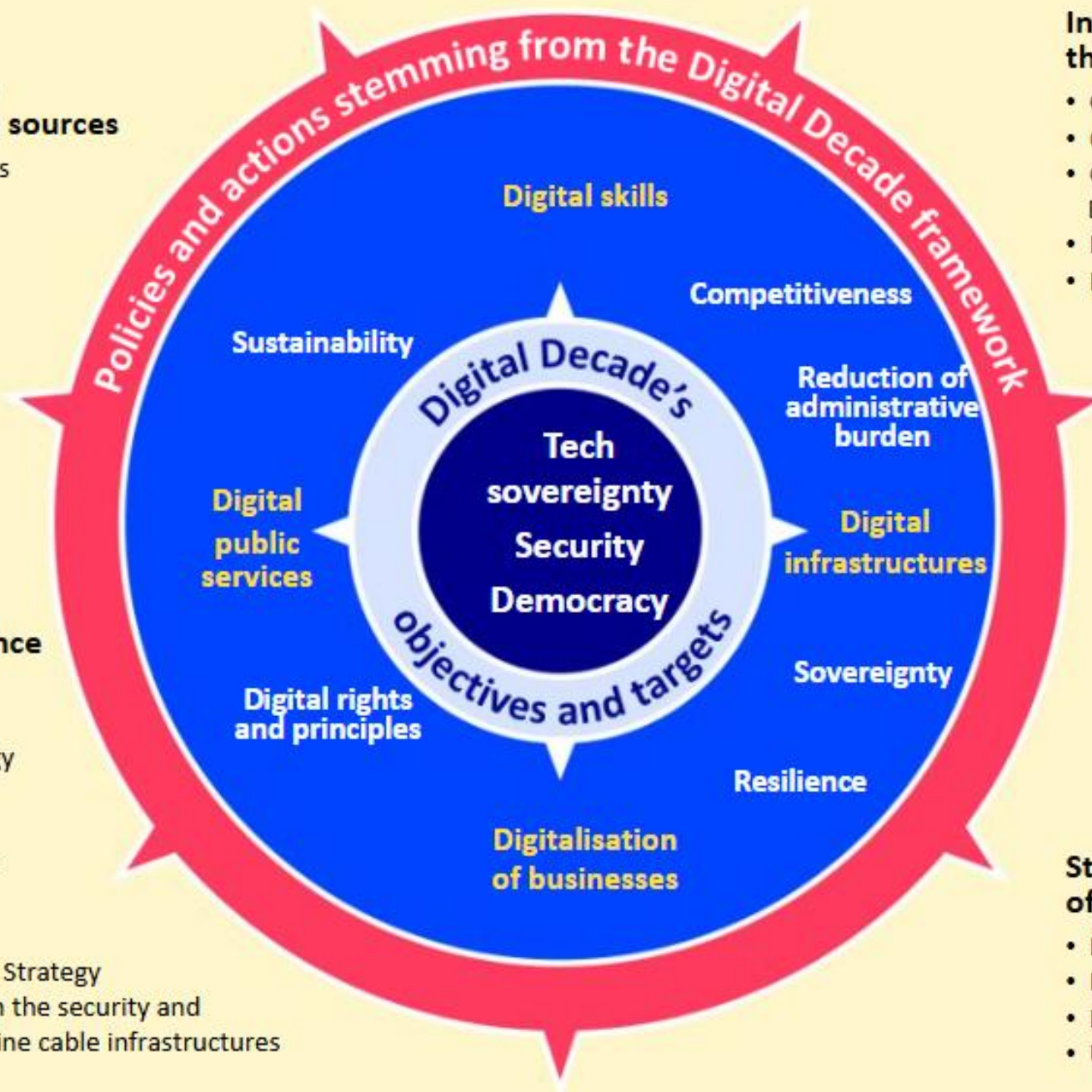
The Digital Decade Policy Programme and the EU's digital priorities

Investments from public and private sources

- Funding Programmes (RRF, DEP, Horizon, CEF Digital)
- EDICs
- IPCEIs
- InvestAI

Security and defence

- EU Defence Union
- Chips Act
- EU Quantum Strategy
- EU Quantum Act
- NIS2 Directive
- Cyber Resilience Act
- Cyber Solidarity Act
- ProtectEU
- Preparedness Union Strategy
- Recommendation on the security and resilience of submarine cable infrastructures



Integration of the Single Market

- Competitiveness Compass
- Omnibus
- Cloud and AI Development Act
- Digital Networks Act
- EU Business Wallets

Cooperation

- Digital Decade Board
- AI Factories
- Gigafactories
- EuroHPC JU
- Chips JU

Strengthening of democracy

- Digital Services Act
- EU Democracy shield
- EU Digital Identity Wallets
- Union of Skills



Thank You!



Key facts & figures from the State of the Digital Decade report 2025: protecting and empowering people, preserving EU democracies and values

Basic digital skills remain insufficient across the EU:

Only 55.6% of adults had basic digital skills in 2023, far from the 80% target. Disparities persist across age, education, and employment status.



The ICT workforce gap is critical:

The EU employs **~10 million ICT specialists** (half of the 2030 target) and **299 000 cybersecurity professionals are missing**. Women represent just 19.5% of ICT specialists.



Children's protection online is a top political priority:

Over 54000 calls were handled by Safer Internet Centres in 2024; 93% of surveyed citizens call for stricter safeguards, including robust age assurance tools.



Digital public services and identity are advancing, but strategic gaps remain:

Scores reached **82.3/100** for citizens and **86.2/100** for businesses in 2024. **24 Member States** have notified their eID schemes, but **reliance on non-EU providers** remains a strategic concern. Electronic health records are **accessible in all Member States**.



Information integrity is under pressure:

Disinformation, deepfakes, and AI-driven manipulation are growing concerns for democracy. Public trust is at risk, and stronger safeguards are needed to ensure the integrity of elections and civic debate.



Key facts & figures from the State of the Digital Decade report 2025:

Harnessing digitalisation for the green transition

Cities are key to the green-digital nexus:

100 cities are engaging in digital twin projects via the **CitiVERSE EDIC**; digital tools are increasingly used for climate-neutral mobility, energy and buildings.



Advanced computing powers green modelling:

EuroHPC supercomputers enabled kilometre-scale Earth system models under the **Destination Earth** initiative, improving climate risk forecasting.



The EU's digital sustainability tools are expanding:

Testing & experimentation facilities (**TEFs**) are helping deploy smart solutions in energy, transport, and urban systems under projects like CitCom.ai.



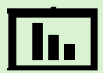
Data centre capacity must scale fast and sustainably:

EU data centre capacity (~8–10 GW) is one-third of the US; **to meet demand and climate goals, it must triple by 2030.**



Digital product passports and AI-enabled resource efficiency gain traction:

Digital product passports are advancing in sectors like batteries and textiles; **AI is increasingly used to optimise energy use** in buildings, grids, and industry.



Key facts & figures from the State of the Digital Decade report 2025:

Building coherence, efficiency and simplification

Fragmentation challenges persist:

National regulations and administrative burdens continue to hinder the potential of the Digital Single Market and pan-EU investment.



Governance innovations are underway:

The Commission plans **new initiatives** like the **Digital Networks Act** and the **Cloud and AI Development Act** to improve market coordination and deployment.



Future-proofing EU digital governance:

Regulatory sandboxes, cross-border pilots (e.g. Once-Only Technical System, AI Factories), and the **Interoperable Europe Act** aim to build a seamless digital public infrastructure.



Cities and regions are gradually included in digital governance:

Initial engagement mechanisms -such as stakeholder exchanges and Living-in.EU initiatives - are helping to **align local realities with EU digital priorities**, but structured multilevel coordination is still under development.



Funding the Digital Decade:

EUR 207 billion in EU budget is estimated to support digital decade targets and objectives. Still largely insufficient against the needs.

