EUROPEAN
COMMISSION

Brussels, 17.6.2026
SWD(2026) 155 final

PART 9/27

COMMISSION STAFF WORKING DOCUMENT

Digital Decade 2026 country report

Accompanying the document

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

State of the Digital Decade 2026: Closing structural gaps and mobilising investments for 2030 and beyond

{COM(2026) 288 final} - {SWD(2026) 154 final} - {SWD(2026) 156 final} - {SWD(2026) 157 final}

European Commission

DIGITAL DECADE COUNTRY REPORT 2026

Finland

Finland

Contents

Executive summary

Finland has established itself as a digital frontrunner, with digitally agile enterprises, strong digital skills and leadership in artificial intelligence (AI) and supercomputing. However, Finland has not fully harnessed its digital potential due to persistent connectivity gaps in rural areas, stagnant cloud adoption and a shortage of ICT professionals.

Finland benefits from a range of strong **digital leadership** assets. It is advancing semiconductor innovation and research, and promoting cross-sector AI adoption, including hosting one of the EU's first AI factories, LUMI, and strengthening AI education. Finnish businesses are highly digitalised, supported by sustained public and private investments. People in Finland demonstrate strong digital proficiency alongside robust awareness of privacy issues and critical content-evaluation skills, while e-Government services are widely adopted across society.

Addressing persistent connectivity gaps in rural areas remains important to ensuring that all communities can benefit from the digital economy and have equitable access to services such as e-government, remote work, and digital education. At the same time, stagnant cloud adoption may create long-term issues, given that growing demand for high-performance computing will necessitate additional investment. ICT talent shortages threaten Finland's ability to capitalise on its technological leadership, meaning it could fall behind in AI innovation, data-driven industries and high-performance computing (areas where the country currently excels). If these challenges are not addressed, Finland may struggle to sustain its **competitive edge in digitalisation** and to fully realise the economic and societal benefits of its advanced digital infrastructure.

Finland in the Digital Decade

Finland shows a high level of ambition in its contribution to the Digital Decade having set 12 national targets (out of 14 possible), 100% of which aligned with the EU 2030 targets. In its national roadmap, Finland provided 10 trajectory points for 2025 (out of 13 analysed). The country is following them well with 80% considered on track. Finland addressed 86% of the 7 recommendations issued by the European Commission in 2025, either by implementing significant policy changes (29%) or making some changes (57%) through new measures. According to the national roadmap, by the end of 2026, 43% of the measures will come to an end. The total public budget associated with these measures is EUR 70 million, representing 13% of the total public budget outlined in the roadmap.

According to the special **Eurobarometer on 'the Digital Decade' 2026**, **83% of Finnish people consider that digital policy should have a very high/high priority for the EU** in shaping our future in Europe. They also think that, in the next 10 years, the EU should cooperate with Member States to reinforce cybersecurity and protection from online threats (96%), promote digital education and skills programs (90%), and strengthen the regulation of online platforms (83%).

In addition, **87% of Finnish respondents think that the EU should reduce its dependencies on digital from non-EU countries**, and 93% that EU should prioritise investments in digital infrastructure and services that are developed and controlled in Europe. Meanwhile, 68% would be willing to switch to an EU-based digital service provider even if it means slightly higher costs.

Funding for digital and multi-country projects

Finland allocates 29% of its total recovery and resilience plan to digital (EUR 0.5 billion). In addition, under the cohesion policy, EUR 0.4 billion, representing 19% of the country's total cohesion policy funding, is dedicated to advancing Finland's digital transformation.

Finland is an observer of the Alliance for Language Technologies European Digital Infrastructure Consortium (EDIC). It is directly participating in the Important Project of Common European Interest on Microelectronics and Communication Technologies (IPCEI-ME/CT). The country is also a participating state of the EuroHPC Joint Undertaking (JU) and of the Chips JU.

Digital Decade KPI (1)	Finland				EU		Digital Decade target by 2030	
	Last available data (2)	DESI 2026 (year 2025)	Annual progress	National trajectory 2025 (3)	DESI 2026	Annual progress	FI	EU
Fixed Very High-Capacity Network (VHCN) coverage	81.7%	84.6%	3.6%	72.1%	85.5%	3.7%	100.0%	100%
Fibre to the Premises (FTTP) coverage	68.3%	80.0%	17.2%	72.1%	74.1%	7.1%	100.0%	-
Basic 5G coverage	99.5%	100.0%	0.5%	99.6%	96.8%	2.6%	100.0%	100%
Edge Nodes (estimate, new methodology)	-	110	-	-	7451	-	-	10000
SMEs with at least a basic level of digital intensity *	85.6%	94.0%	4.8%	91.5%	71.4%	11.0%	95.0%	90%
Cloud *	73.0%	73.1%	0.1%	73.6%	46.7%	9.5%	75.0%	75%
Artificial Intelligence	24.4%	37.8%	55.2%	35.0%	20.0%	48.0%	75.0%	75%
Data analytics *	40.6%	45.1%	5.5%	52.0%	39.9%	9.5%	75.0%	75%
AI or Cloud or Data analytics *	79.5%	81.0%	0.9%	-	63.2%	7.5%	-	75%
Unicorns	6	8	33.3%	-	324	10.2%	-	500
At least basic digital skills *	82.0%	81.0%	-0.6%	83.4%	60.4%	4.3%	87.0%	80%
ICT specialists	7.8%	7.8%	0.0%	8.3%	5.0%	2.0%	10.0%	~10%
e-ID scheme notification		Yes						
Digital public services for citizens	96.3	97.4	1.2%	92.0	84.6	2.8%	100.0	100
Digital public services for businesses	98.8	98.8	0.0%	-	88.6	2.7%	100.0	100
Access to electronic health records	84.7	91.4	7.9%	-	86.5	4.6%	100.0	100

(1) Indicators full description, metadata and sources in the DESI 2026 methodological note
(2) The latest available data is from DESI2025 (reference year 2024) except for indicators marked with a star * for which it is DESI2024 (reference year 2023)
(3) National trajectory value for 2025, if set by the country in its Digital Decade national roadmap

A competitive, sovereign and resilient EU based on technological leadership

Finland's 2025 digital and technological landscape reflects strong performance in key areas but reveals mixed progress in adoption, infrastructure, and innovation. Digital connectivity shows steady improvement with the decommission of copper, adoption of a 6G roadmap, near-universal **5G**

coverage and **Fibre-to-the-Premises (FTTP) adoption** surpassing EU averages. On the other hand, **Very High-Capacity Network (VHCN) coverage** lags behind, and gaps in rural area coverage (FTTP and VHCN) is a threat to further deepen the digital divide. Finland excels in the digitalisation of small and medium-sized enterprises (SMEs)**,** though growth rates for cloud adoption and data analytics have slowed. **AI adoption** remains a standout, driven by initiatives like the LUMI AI Factory. **Finland's 2025-2035 Quantum Technology Strategy** position the country as a global leader by integrating research, industrial policy, and infrastructure, while expanding commercialisation, quantum-secure communications, and export-driven innovation through Business Finland's quantum program. By accelerating private-sector growth, cross-border partnerships, and market capture, would allow Finland to full capitalise on its world-class ecosystem. In **semiconductors**, Finland has strengthened its ecosystem through initiatives such as the VTT Technical Research Centre of Finland's (VTT) pilot lines (e.g. FAMES and NanoIC), Tampere University's wide-bandgap (WBG) packaging hub and the Finnish Chips Competence Centre (FiCCC). These efforts bring together academia and industry while also supporting collaboration across the Nordic and Baltic regions. **Cybersecurity** continues to be a national strength, although reliance on non-European providers and fragmented funding structures risk weakening long-term resilience. Meanwhile, **the start-up ecosystem** is seeing a decline in the number of new ventures, even as investment – particularly in deep tech – continue to grow.

Protecting and empowering EU people and society

Finland's digital society in 2025 demonstrates exceptional strength in skills and public services, though persistent gaps exist in the availability of ICT specialists. The level of basic digital skills continues to be significantly above the EU average, standing out due to women outperforming men. However, stagnant skills growth and the urban-rural divide risks eroding Finland's lead. While **ICT education in Finland is expanding**, domestic output has been short of industry demand. This makes strategic international recruitment of high-skilled digital talent essential to fill persistent gaps, capitalise on the country's strong ICT reputation and support businesses driving growth through next-generation technologies. Recently, due to the general economic situation, unemployment of the recently graduated has been rising. **Digital public services** continue to rank among the best in the EU, with initiatives such as suomi.fi leading the way. Finland is in the process of **harmonising the EU Digital Identity (EUDI) Wallet.**

Recommendations

- **Connectivity:** Finland should close the remaining fixed gigabit coverage gap in rural and sparsely populated areas in particular by: (i) maintaining Finnish leadership on mobile networks and on the next-generation roadmap, including through the sustained implementation of the national 6G roadmap published in June 2025 promotion of the deployment of 5G SA networks and of the national project on secure and future-proof communication networks. (ii) it should take advantage of the upcoming expiry rights of use to negotiate pro-investment conditions, (iii) scaling up existing broadband support measures for areas where market failure is evident, complemented by targeted state-aid schemes and community-led initiatives.
- **ICT specialists:** to meet the fast-growing demand for ICT specialists from Finnish industry and to address persistent gaps in supply, Finland should deploy a coordinated set of training, attraction and retention measures aligned with the country's priority technology domains, in particular by: (i) offering tailored training pathways for ICT specialists already in the workforce, aligned with the demand from the LUMI AI Factory, from the Finnish Chips Competence Centre and from the quantum ecosystem, including by building on the national doctoral-training pilot programme 2024-2027; (ii) reinforcing the attraction and retention of ICT specialists from abroad, and addressing the persistent gender gap in the field (iii) intensifying efforts to increase women's participation in ICT studies and careers.
- **Take-up of technologies:** Further promote cooperation between academia, businesses, and other stakeholders, with a view to advancing innovation with the support of digital technologies with a particular emphasis on cloud and data analytics.
- **Cybersecurity:** Reinforce further efforts in cybersecurity to address evolving threats, particularly for enterprises and public administration. To strengthen digital sovereignty and align with EU strategic priorities, Finland should expand its reliance on European cybersecurity suppliers while addressing current funding gaps and structuring investments more effectively. Ensure the effective operation of the national cybersecurity services for information security threat detection and attack surface mapping, including by securing predictability of public funding for these services. Finalise efforts to ensure imposition of cybersecurity measures necessary to enhance the cyber posture of critical infrastructure.
- **Quantum:** Accelerate the transition from infrastructure excellence toward a broader industrial and export-oriented base, widening the company landscape beyond the current concentrated core. Reinforce Finland's instruments for attracting foreign investment and supporting commercial scale-up. Enforce the integration of the Finnish ecosystem into European value chains and intensify collaboration and contribute to building a European quantum supply-chain.
- **Semiconductors:** Continue investing in the development and manufacturing of critical technologies in the areas of digital and deep tech.

A competitive, sovereign and resilient EU based on technological leadership

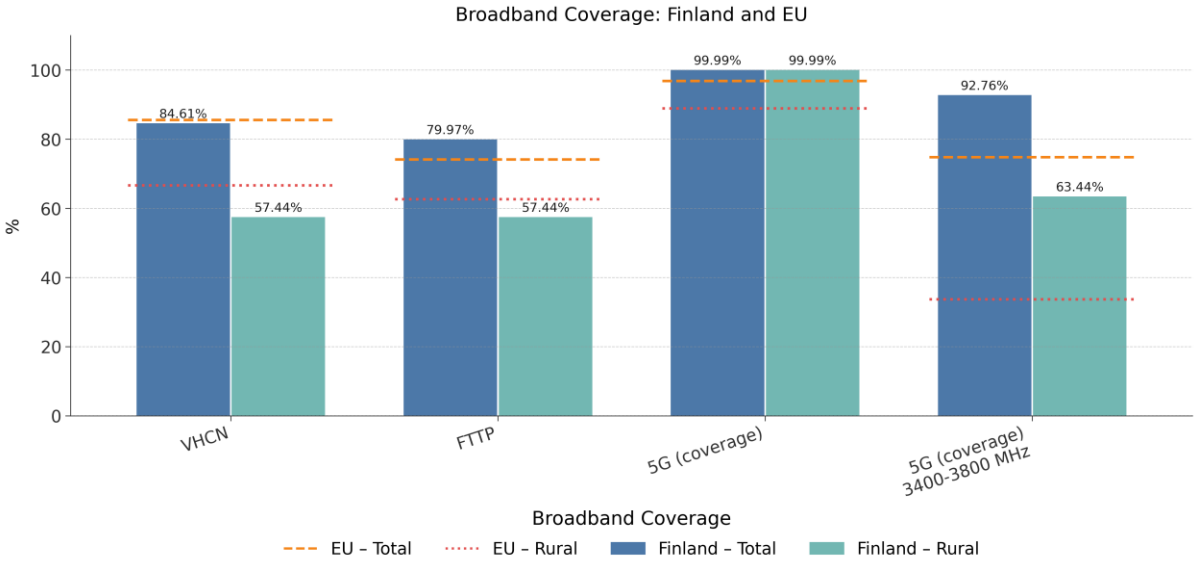
Building technological leadership: digital infrastructure and technologies

Connectivity infrastructure

Performance assessment

In 2025, Finland's VHCN coverage reached 84.61% of households following an increase of 3.6% from the previous year. This figure is slightly below the EU average of 85.54%, but the annual growth rate was slightly higher than the EU's 3.7%. In 2024, Finland's VHCN coverage was 81.65%, which was also marginally lower than the EU's 82.49%. In sparsely populated areas, Finland's VHCN coverage was 57.44% in 2025, following an increase of 15.0% from 2024. This is still below the EU average of 66.66% and the corresponding growth rate of 7.7%. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

Finland's FTTP coverage reached 79.97% of households in 2025, following an impressive increase of 17.2% from the previous year. This figure is above the EU average of 74.13%, with a growth rate that was significantly higher than the EU's 7.1%. In 2024, Finland's FTTP coverage was 68.26%, slightly lower than the EU's 69.24%. In sparsely populated areas, Finland's FTTP coverage was 57.44% in 2025, following an increase of 15.0% from 2024[1]. This is below the EU average of 62.61% but significantly higher than the corresponding growth rate in the EU (6.5%). In 2024, Finland's coverage was 49.95%, which was also lower than the EU's 58.76%. The country is on track according to its trajectory presented in the Digital Decade national roadmap.



Finland's basic 5G coverage reached 99.99% of households in 2025, following an increase of 0.5% from the previous year. This figure is above the EU average of 96.79%. In 2024, Finland's 5G coverage

[1] FTTP values are equal to VHCN ones in rural areas because there are no DOCSIS 3.1 cables.

was 99.49%, which was also higher than the EU's 94.35%. In sparsely populated areas, Finland's basic 5G coverage was 100.0% in 2025, following an increase of 3.0% from 2024. This is above the EU average of 88.88%. In 2024, Finland's coverage was 97.08%, which was also higher than the EU's 79.58%. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

Finland's 5G coverage in the 3.4-3.8 GHz band covered 92.76% of households in 2025, following an increase of 1.0% from the previous year. This figure is above the EU average of 74.75%. In 2024, Finland's coverage was 91.86%, which was also higher than the EU's 67.6%. In sparsely populated areas, Finland's 5G coverage in the 3.4-3.8 GHz band was 63.44% in 2025, following an increase of 7.8% from 2024. This is significantly above the EU average of 33.71%, but with a smaller annual growth rate compared to the EU's 32.9%. In 2024, Finland's coverage was 58.84%, which was also higher than the EU's 25.36%.

The table below provides an overview of VHCN, FTTP and 5G coverage across NUTS-2 regions in Finland, which consistently show lower performance in rural connectivity for VHCN and FTTP coverage.

	VHCN coverage		FTTP Coverage		5G Coverage	
	Overall	Rural	Overall	Rural	Overall	Rural
National coverage	84.61%	57.44%	79.97%	57.44%	99.99%	99.99%
Åland	94.00%	90.89%	94.00%	90.89%	99.00%	99.01%
Etelä-Suomi	83.16%	70.06%	75.96%	70.06%	100.00%	100.00%
Helsinki-Uusimaa	91.00%	39.11%	88.00%	39.11%	100.00%	100.00%
Länsi-Suomi	82.70%	44.17%	78.27%	44.17%	100.00%	100.00%
Pohjois- ja Itä-Suomi	78.96%	66.73%	74.01%	66.73%	100.00%	100.00%

Policy context and assessment of recommendations

Mobile network coverage in Finland is almost universal. However, fixed connectivity – particularly high-capacity fibre – remains more challenging outside some major urban centres. Fibre investments by operators continue to grow rapidly, with estimates suggesting that nearly 90% of urban households now have access to fibre connections. At the same time, public support remains essential to extending VHCN coverage in rural and sparsely populated areas. Under the recovery and resilience facility (RRF), Finland has supported 36 broadband projects, with over 20 000 new premises passed. In parallel, EUR 53 million has been allocated to Finland for 2023-2027 under the European agricultural fund for rural development (EAFRD). As of October 2025, 48 municipal projects had been funded under these schemes, with EUR 16 million committed and a further EUR 12 million in projects still pending. This demonstrates continuous need for public support. According to Traficom's predictions, up to 92% of households could be covered by fibre by the end of 2028, while the remaining areas are unlikely to be served by the market. Nonetheless, there is growing local interest and engagement in covering this 'last mile.' Community-led initiatives such as the village support programme, funded by the EU rural development fund and municipalities, have supported 48 projects with EUR 18 million, with an additional EUR 12 million allotted to pending projects. Regarding mobile networks, Finland continues to be at the forefront of innovation, with the publication of a national 6G roadmap in June 2025. Furthermore, Finland's Ministry of Transport and Communications released an interim review of the TUUTTI project, outlining progress in building secure, future-proof communications infrastructure to drive sustainable growth by 2037. Priorities include network security, fibre expansion, 6G/mobile innovation, and regulatory reforms to attract investment.

Copper network switch-off is fully underway. As of end of December 2025, around 1% (approximately 24 000) of all fixed internet subscriptions rely on copper cable and are being decommissioned by the

operators. In addition, traditional telephone services still rely on copper, but landline connections are planned to be switched off in 2026. Traficom, the national regulatory authority for electronic communications, predicts that full decommissioning will have taken place by the end of 2027, with replacement offered by 4G/5G networks and fibre investments where viable.

2025 recommendation on gigabit: Intensify efforts to develop fixed gigabit connectivity, including by encouraging the take up of the existing broadband support measure and identifying the most suitable strategies to achieve full coverage.
In 2025 Finland made some efforts to address the recommendation through new policy actions. The EAFRD project has accelerated and a new project on security and economic growth from communication networks (TUUTTI) has emerged. It identifies four priorities, one of which focuses on developing high-speed networks in areas lacking market-driven construction. This will be supported by legislation and efficient planning and permitting.

Semiconductors

In 2025, Finland made strides in investing and continuing the development of advanced technologies, through the VTT Technical Research Centre of Finland Tampere University and the Finnish Chips Competence Centre.

The VTT Technical Research Centre of Finland (VTT) demonstrated progress in semiconductor innovation by participating in key pilot lines, successfully executing projects such as FAMES, APECS, NanoIC and PIXEurope, and initiating investments and technological advancements within the Chips JU pilot lines. Building on this momentum, VTT progressed towards its next milestones for 2026, including the internal benchmarking of emerging technologies. Meanwhile, **Tampere University strengthened its WBG pilot line capabilities** by hiring specialised personnel for WBG packaging development and finalising plans for the new SiPFAB cleanroom facility as scheduled. Industrial collaboration in advanced WBG packaging also gained traction, with partnerships established with leading European power electronics firms, including Infineon, ABB, Danfoss and Kempower.

The Finnish Chips Competence Centre (FiCCC), operational since early 2025, emerged as a national hub, fostering collaboration among Finnish universities active in semiconductor research and attracting industry participants from across Finland and the broader Nordic region. In 2025, FiCCC became Finland's operational national hub for semiconductor innovation, transitioning to a fully functional, simple and efficient entry point for experts and companies looking for support. It included integrated circuit design coaching, partner matching, road mapping, EU funding guidance, skills development and business consultation. To prepare stakeholders for opportunities under the EU Chips Act, FiCCC offered targeted guidance on design platforms, pilot lines and workshops. It also led a national co-innovation programme for next-gen security operations centres solutions and advanced the Finnish Design Enablement Team concept to align with EU initiatives. On start-ups and funding, FiCCC provided weekly support to a flagship deep-tech start-up, securing research and development (R&D) funding and preparing for infrastructure investments, while assisting over 10 SMEs in pitching and funding readiness. A European accelerator link and a national mentoring programme for university spin-outs were also set up. To address skills gaps, FiCCC conducted a national skills survey, mapped SoC-design expertise, and promoted training programmes, including degree courses and summer schools. By year-end, all KPIs and milestones – such as service catalogues, roadmaps and entrepreneurship support – had been achieved.

FiCCC also strengthened cross-border collaboration, signing a memorandum of understanding (MoU) with Nordic and Baltic centres, joining a Baltic-Nordic network and engaging with EU-funded chips competence centres (CCCs). As a European Network of Cultural Centres (ENCCC) associate partner, Finland increased its visibility in EU semiconductor forums, solidifying its role in Europe's ecosystem. A landmark achievement was the signing of an MoU with Nordic and Baltic competence centres in December 2025. This encompassed 25% of all EU-funded CCCs, with plans for deeper long-term cooperation extending to other EU countries. FiCCC also partnered with Technology Industries Finland to mentor research-to-business (R2B) start-ups, aiming to expand its portfolio of supported companies in 2026, while engaging with multiple cities to map critical skills gaps in the sector.

On the funding front, Business Finland continued its 'Chips Campaign', actively promoting collaboration between companies and researchers, while encouraging participation in EU funding initiatives, particularly under Chips JU and Eureka Xecs. Semiconductors were designated as a strategic priority in Business Finland's funding portfolio, reinforcing Finland's national commitment to the sector.

2025 recommendation on semiconductors and digital innovation: Continue investing in the development and manufacturing of critical technologies in the areas of digital and deep tech.
In 2025, Finland addressed fully the recommendation by putting significant policy actions into place. With VTT's, and Tampere University's active participation in various projects, the launch of the FiCCC and strengthened cross-border collaboration, and Business Finland's 'Chips Campaign', the country demonstrated continued investment in development and manufacturing within the semiconductor sector.

Edge nodes

Performance assessment

According to the Edge Node Observatory, Finland is estimated to have deployed a total of 110 edge nodes by 2025. Due to a change in methodology, this number cannot be compared to previous estimations.

Policy context and assessment of recommendations

As explained in the roadmap adjustment, as well as the last year's State of the Digital Decade report on Finland, Finland sees the increase of edge nodes as being due to grassroots market development. Therefore, the country does not set a separate target. It expects an increase in the number of edge nodes when businesses generate sufficient demand for cloud-based AI exploitation.

Finland adopted an official quantum technology strategy in 2025, covering the period 2025-2035. The strategy aims to make quantum technology a new engine of growth for the country and is explicitly geared towards business competitiveness, attracting international investment and the renewal of Finnish industry. Its core measures include creating a world-leading environment for quantum computing, building infrastructure for quantum devices, strengthening skills, launching a long-term research, development and innovation (RDI) programme, supporting the global growth of companies and deepening international cooperation. The Finnish approach is therefore not limited to science policy: it combines research excellence, industrial policy, infrastructure, talent and export-oriented ecosystem development in a single national framework.

Finland's strategy is particularly ambitious on computing infrastructure. It commits Finland to continued investment towards a 1 000 logical-qubit error-corrected quantum computer, targets a global top five HPC+AI+QC infrastructure and aims to develop and manufacture a significant share of that future quantum system domestically. This builds on a relatively advanced existing base: in March 2025, VTT and IQM launched Europe's first 50-qubit superconducting quantum computer, made available for research and business use, and in May 2025 VTT selected IQM to deliver a 300-qubit superconducting quantum computer as the next step in Finland's national roadmap. The strategy also links quantum development to broader infrastructure policy, including the LUMI AI Factory environment and the Kvanttinova pilot and development centre, for which the government has allocated EUR 79 million for 2024-2027, alongside additional support for quantum computing environments connected to LUMI.

At the same time, Finland's strategy is broader than quantum computing alone. It covers quantum sensing, communications and quantum-secure encryption, while placing strong emphasis on commercialisation and on turning research assets into exportable industrial capabilities**.** Business Finland's quantum programme (2022-2026) complements this by encouraging companies develop quantum-based solutions, in close cooperation with research organisations connecting with foreign partners, and attracting international participation into the Finnish ecosystem.

In Finland, educational initiatives are expanding. There is a new BSc/MSc quantum module launching in autumn 2026, alongside specialised courses and an ongoing doctoral training pilot (2024-2027) involving 90 students. Aalto University also recently introduced a full BSc and MSc programme in quantum. With respect to hardware, Finland's ambition is to develop a quantum computer with 1 000 logical qubits by 2035, building on existing milestones: a 5-qubit superconducting quantum computer (2022) and a 50-qubit machine (2025), a planned 300-qubit machine in 2027 all integrated with the LUMI supercomputer to create a hybrid computing environment for algorithm and software development. This platform is accessible to researchers and businesses, fostering EU-wide collaboration.

Overall, Finland stands out as a country with a highly coherent research-industrial stack and unusually explicit long-term computing ambitions. Finland's main challenge is to facilitate domestic and European capitalisation of their strong national ecosystem and to further scale productisation, business growth and cross-sector and international market capture, while making use of European tech.

Supporting EU-wide digital ecosystems and scaling up innovative enterprises

SMEs with at least basic digital intensity

Performance assessment

In Finland, 94.04% of SMEs showed at least a basic level of digital intensity, standing above the EU average of 71.39%, after a progression of +4.8% annually between 2023 and 2025 (lower than the EU's average growth rate of 11.0%, likely explained by Finland's high starting point)**.** In 2023, the figure for Finland was 85.59%, which was also higher than the EU's 57.9%. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

Regarding SMEs with a very high digital intensity index, Finland is at 23.69% after a progression of +43.1% annually between 2023 and 2025, surpassing the EU average of 9.07%. In 2023, Finland's figure was 11.57%, which was already higher than the EU's 4.38%. Although Finland's growth rate of 43.1% is slightly below the EU's 43.9%, the country remains significantly ahead in terms of the proportion of highly digitalised SMEs. In summary, Finland's SMEs are well ahead of the EU average in both basic and advanced digital intensity.

Policy context and assessment of recommendations

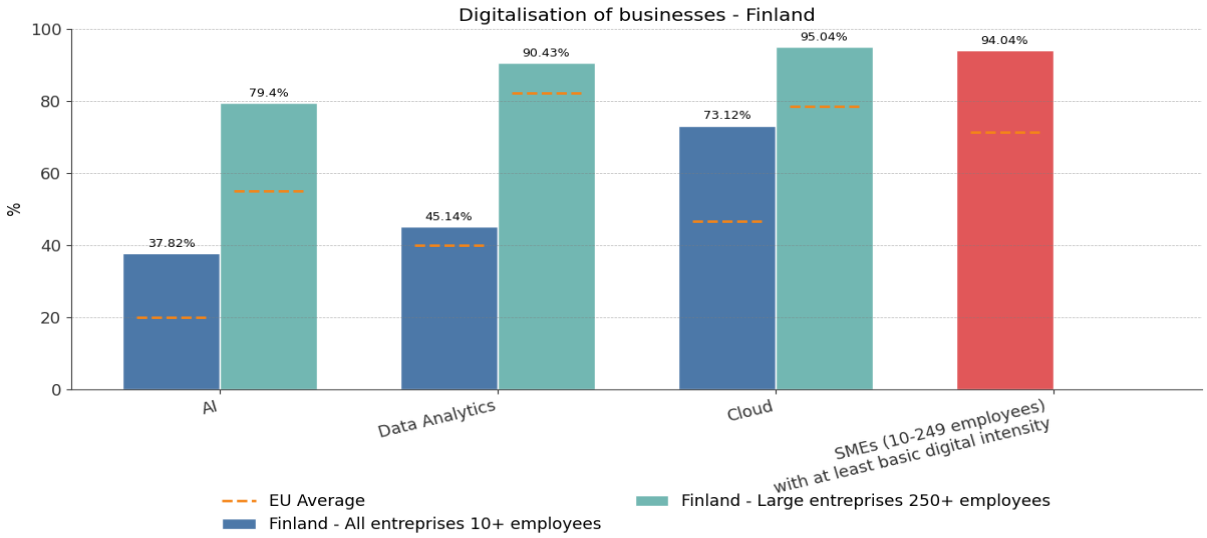
Finland is prioritising R&D by setting clear strategic objectives and boosting investment from both the public and private sectors to further boost the digitalisation of SMEs. In early 2026, the Prime Minister-chaired Research and Innovation Council set out strategic RDI priorities to foster sustainable growth, drive economic and societal renewal, and increase national security. This is to be supported by EUR 3.17 billion in public funding (a EUR 255 million increase from 2025). A significant portion of this competitive R&D funding is administered by Business Finland, focusing on companies' ambitious and long-term R&D activities, as well as cooperation between companies and research organisations. Reflecting this commitment, Business Finland's R&D budget increased by over EUR 100 million, reinforcing Finland's push to strengthen deep-tech commercialisation and maintain its competitive edge in cutting-edge industries.

Investment in R&D in the private sector also continues to increase in Finland. A recent study shows that Finland's 100 largest enterprises have increased their total expenditure to EUR 9.1 billion in 2025, an increase from EUR 8.8 billion. In 2024, enterprises focusing on defence technology and digital services had the highest increase in R&D expenditure.

LUMI continues to be a unique opportunity for companies to leverage high-performance computing as part of their product development and innovation activities. In 2025, it was ranked the fastest supercomputer in Europe (ninth in the world). With the HPE Cray EX system and a computing power of 380 petaflops, LUMI is also one of the most eco-efficient data centres and leading platforms for AI in the world. 20% of Finland's national supercomputing capacity is reserved for enterprises, with the aim of boosting business competitiveness and enabling access to high-performance computing, simulation, AI and data analytics – particularly given that LUMI is one of the world's most powerful AI platforms. Throughout 2025 and early 2026, LUMI enabled enterprises to innovate. One notable example is TildeOpen, an open-source multilingual AI model specifically designed for Europe's languages. It is around 30% more efficient at processing European languages than leading global models and, after winning the Commission's Large AI Grand Challenge, was awarded 2 million GPU hours on the LUMI supercomputer. In parallel, a new data centre is being built to host the EuroHPC LUMI-AI supercomputer and the LUMI-IQ quantum computer. Construction began in January 2026, with production readiness expected by spring 2027.

Take up of advanced technologies

Performance assessment



In 2025, 45.14% of Finnish enterprises adopted data analytics after a progression of +5.5% annually between 2023 and 2025, standing above the EU average of 39.85% but showing a lower growth rate (EU: 9.5%). In 2023, the figure for Finland was 40.55%, which was also higher than the EU's 33.25%. When focusing on SMEs, Finland is at 43.6% after a progression of +5.6% annually, which is higher than the EU's 38.59%. Similarly, large enterprises in Finland are at 90.43% after a progression of +2.8% annually, surpassing the EU's 82.03%. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

In 2025, 73.12% of Finnish enterprises adopted cloud technologies, which is higher than the EU average of 46.69%. This shows a progression of +0.1% annually between 2023 and 2025, considerably lower than the EU's 9.5%. In 2023, the figure for Finland was 72.99%, significantly higher than the EU's 38.97%. This trend is consistent across SMEs and large enterprises, with Finland's figures at 72.38% and 95.04% respectively, but showing minimal growth rates compared to the EU averages. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

Finland is at 37.82% of enterprises adopting artificial intelligence, after a notable progression of +55.2% annually between 2023 and 2025, surpassing the EU's average of 19.95% and growth rate of 48.0%. In 2024, the figure for Finland was 24.37%, which was also higher than the EU's 13.48%. Moreover, 36.41% of SMEs in Finland had adopted AI after a progression of +59.6% annually, compared to the EU's 18.9%. Large enterprises in Finland are at 79.4% after a progression of +12.8% annually, which is higher than the EU's 55.03%, though the growth rate is lower than the EU's 33.7%. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

When considering the combined adoption of AI, cloud, or data analytics, Finland is at 80.95% after a progression of +0.9% annually between 2023 and 2025, standing above the EU average of 63.2% but showing a slower growth than the EU (7.5%). In 2023, the figure for Finland was 79.51%, which was higher than the EU's 54.7%. This trend is consistent across SMEs and large enterprises, with Finland's figures at 80.37% and 98.12%, respectively, but with minimal growth compared to the EU averages. The country did not provide a national trajectory point for 2025 in the Digital Decade national roadmap.

Overall, Finnish businesses are generally more digitalised than their EU counterparts, but the pace of adoption of cloud and data analytics has slowed in recent years. Finland consistently surpasses the EU averages in the adoption of digital technologies and the digital intensity of its SMEs. This is particularly evident in the high proportion of SMEs with a very high digital intensity index and the strong adoption rates of AI and data analytics. On the other hand, Finland's growth rates in recent years have been slower than the EU averages in most areas.

Policy context and assessment of recommendations

Finland has established itself as a leader in AI and has the tools to continue to sustain this through its computing capacity, data and knowledge. AI is highly prioritised by Finland both through public and private initiatives. In 2025, the LUMI AI Factory, one of EU's first AI factories, launched its first 13 services (more are expected to be launched). These are free of charge for SMEs, start-ups and academic researchers, and include consulting, high-performance computing resource packages for AI development on the LUMI supercomputer, data-sets-as-a-service, training and technical support. Furthermore, AI Finland, launched in 2024, is a network aiming to help Finland become a global leader in AI applications by accelerating the development and adoption of AI in the business sectors. AI Finland is part of New Nordics AI, the Nordic-Baltic centre for applied AI. Finally, the pilot project for doctoral programmes (2024-2027) will recruit 1 000 new doctoral researchers across 15 research fields, with a focus on flagship areas, using EUR 255 million to restructure doctoral programmes, increase flexibility and mobility, and better align doctoral training to diverse career paths and societal needs.

Interestingly, a study published by ETLA found no systematic job displacement among young people linked to AI exposure. Although employment in the early-career groups (ages 22 to 30) has been declining whilst employment in the mid-career and senior cohorts remains stable or slightly increased, the authors find no link with AI exposure. Likewise, wage trends show no persistent differences based on AI exposure. These results suggest that Finland's labour market remains resilient to immediate AI-driven disruptions in entry-level roles. These disruptions may be mitigated by structural and policy factors such as strong employment protection legislation, incentivising firms to reskill and upskill their workers to handle AI-augmented tasks.

The data economy growth programme continues to shape companies' renewal with data-driven business models. It aims to support data-based value creation within Finnish companies, corporations and businesses. Given its limited financial resources, the programme focuses on actively guiding selected priority initiatives, particularly six data economy pilots: Traffic and Logistics, HPC & Datacenters, Construction Industry, Agriculture & Forestry, Textile Industry and Health Care & Social Care. These pilots – which are either preparing to apply for public funding or are already receiving it – operate as 'value networks' or 'business ecosystems', with the goal of improving the effectiveness and success rate of data economy initiatives.

The demand for high-performance computing capacity (essential for AI-driven applications) has also surged in recent years, with exponential growth projected to continue and new investments being made into cloud services providers. Tesi, a state-owned market-driven investment company, made its first investment in Verda, a Finnish AI cloud service provider, which secured EUR 55 million in funding. Verda specialises in GPU-powered cloud services, enabling businesses to develop, train and deploy AI models at scale.

2025 recommendation on the adoption of advanced technologies: Further promote cooperation between academia, businesses, and other stakeholders, with a view to advancing innovation with the support of digital technologies.
In 2025 Finland made some efforts to address the recommendation through new policy actions. In 2025, Business Finland launched a call with the purpose of further enabling collaboration with academics and SMEs (including Mittelstand enterprises). Funding is granted to SMEs that have an identified need for a topic of research but lack the vision or the capacity to directly utilise the know-how in their product development or business. Business Finland covers 80% of the project's eligible costs.

2025 recommendation on AI: Continue strengthening the AI ecosystem to boost Finland's leadership role in this area.
In 2025 Finland has fully addressed this recommendation. Through the launch of the LUMI AI factories, investments from AI Finland and Finland's overall performance and growth in the uptake of AI, it is possible to conclude that Finland has strengthened its AI ecosystem and leadership in the sector.

Unicorns, scale-ups, and start-ups

Performance assessment

At the beginning of 2026, Finland had eight unicorns, which is two more than in 2025 (figure revised downwards to six). The country did not provide a national trajectory point for 2025 in the Digital Decade national roadmap.

Policy context and assessment of recommendations

The Finnish startup ecosystem remains heavily concentrated in technology and software, with nearly 50% of startups operating in IT or digital services. While traditional industries, such as manufacturing, play a smaller role, emerging high-growth sectors (particularly AI, health tech and cleantech) are gaining momentum, especially among newer ventures.

Finland identifies licensing and permitting, as well as access to finance, as the biggest challenges for start-ups.

2025 recommendation on unicorns: Continue improving the business environment and access to finance for digital start-ups to scale-up and compete globally.
In 2025 Finland made some efforts to address the recommendation through new policy actions. Finland is strengthening collaboration among key organisation and agencies. The collaboration is intended to support start-ups and seed start-up enterprises to help them become global leaders in their fields. In line with this, Tesi (Finnish Industry Investment Ltd) has recently made strategic investments under its updated strategy, with a particular focus on AI. Nokia and NestAI announced a landmark strategic partnership, jointly investing EUR 100 million in NestAI to accelerate the advance of physical AI. As one of Europe's fastest-growing physical AI laboratories, NestAI is pioneering next-generation AI solutions for autonomous vehicles, unmanned operations and

command-and-control (C2) systems. Applications span logistics, inspection, surveillance, security and defence.

Strengthening Cybersecurity & Resilience

Finnish enterprises are ahead of their EU peers in implementing cybersecurity measures. In 2024, 79.71% of enterprises applied at least 5 cybersecurity measures (out of 11 measures as measured by Eurostat), higher than the EU average of 56.85%. Finland performs better than the EU average in all the 11 measures, especially in the use of authentication via biometric methods (30.06% in Finland, 18.27% in the EU), encryption techniques (65.10%, EU: 39.72%) and the combination of at least two authentication mechanisms (79.40%, EU: 39.84%).

Finland reports an increase in malware attacks, phishing, and fraud activities but no major incidents have occurred during 2025. The estimated threat level of cyber security remains elevated.

The country is well equipped in terms of cybersecurity policies and structures. The cybersecurity landscape is characterised by long-standing initiatives, most notably the National Cybersecurity 2024-2035 strategy and its implementation plan, which together comprise more than 40 different measures. Furthermore, Traficom and the National Cybersecurity Centre (NSC-FI) has published a product, Cybersecurity scenarios 2035, a concrete tool to help different organisations prepare for possible future developments in the field of cybersecurity. These scenarios have proven to be useful in terms of fostering preparedness and resilience and supporting strategic decision-making. In addition, Finland has taken active measures to prevent scam calls and fraudulent text messages targeting citizens. Through cooperation between telecommunications operators and authorities, it has been possible to stop scam calls that use spoofed Finnish phone numbers. These measures have enabled the filtering of more than 200,000 scam calls directed at Finland each day. In addition, going forward, organizations will be required to authenticate themselves as senders of text messages, which will largely prevent the spoofing of Finnish phone numbers and alphanumeric sender IDs.

Finland is working to create new rules for evaluating cloud services, starting with security requirements. The project is part of a larger plan to build a national set of standards for government use, merging and improving current guidelines. After reviewing comments and testing the rules in practice, the final version will replace two older systems: the Finnish Transport and Communications Agency's cloud security rules and the cloud-related parts of the public sector's information security standards. Work on this began in early 2025, using global security best practices while also dealing with Finland's unique national security concerns and helping government bodies manage risks. The draft version will be open for consultation during the spring of 2026, and the finished rules should be ready by autumn 2026, with plans to add more topics later.

One of the key challenges remains the lack of structured and sustained cybersecurity funding. Without additional investment, several risks may emerge. In particular, societal cyber resilience could weaken. Furthermore, a decline in cybersecurity expertise could further exacerbate the existing skills shortage, while Finland's competitiveness in global markets, particularly in cryptographic technologies, could be significantly undermined. An example of this is Cyber Citizen Finland, an initiative aimed at improving cybersecurity skills among people across the EU, which currently has funding secured only until the end of this year.

Finland

Like many of its EU peers, Finland currently depends heavily on non-European providers for cybersecurity products and services. In line with the EU's strategic priorities and efforts to strengthen digital sovereignty, Finland has an opportunity to further expand the market presence of European suppliers. This could contribute to national resilience and reinforce strategic autonomy in a critical sector.

2025 recommendation on cybersecurity: Continue efforts in cybersecurity to address evolving threats, particularly for enterprises and administration.
In 2025 Finland made some efforts to address the recommendation through new policy actions. The continued implementation of the national cybersecurity strategy, and Traficom's new guidelines and materials, show readiness in the field. However, the lack of structured and continued funding for cybersecurity, and reliance on non-EU tech shows that further efforts could be made.

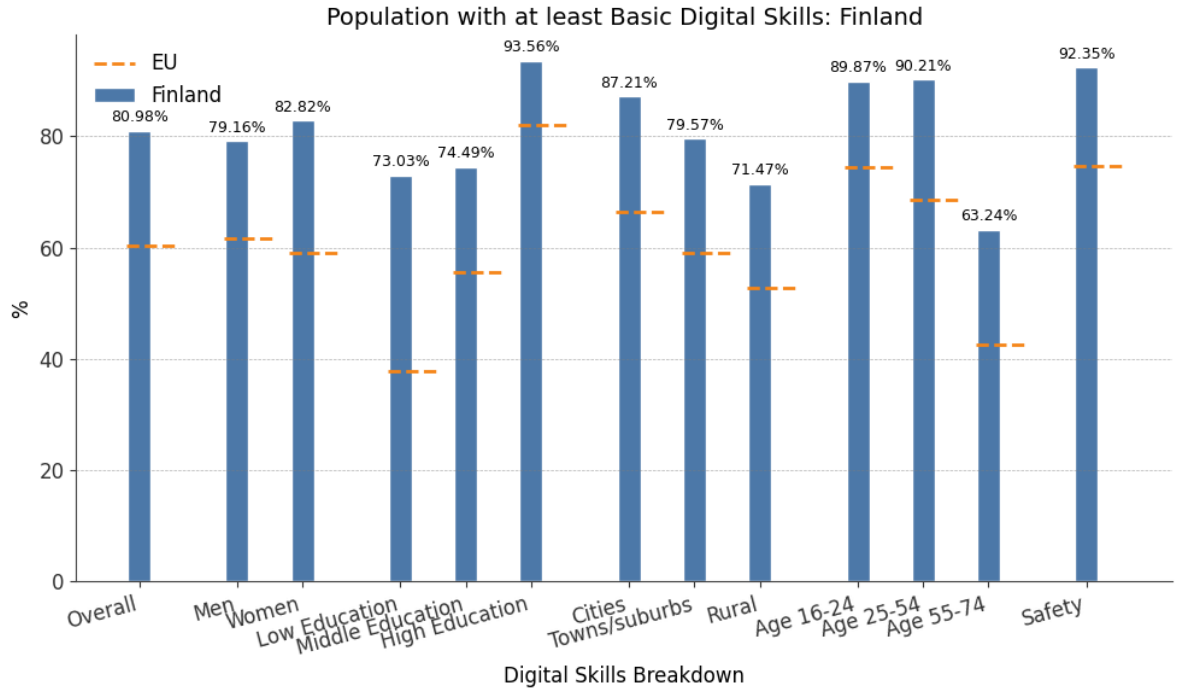
Protecting and empowering EU people and society

Empowering people and bringing the digital transformation closer to their needs

Equipping people with digital skills

Basic digital skills

Performance assessment



Overall, 75% of Finnish people think digitalisation of daily public and private services is making their life easier. This represents a decrease of two percentage points from last year, based on the Digital Decade Eurobarometer 2026.

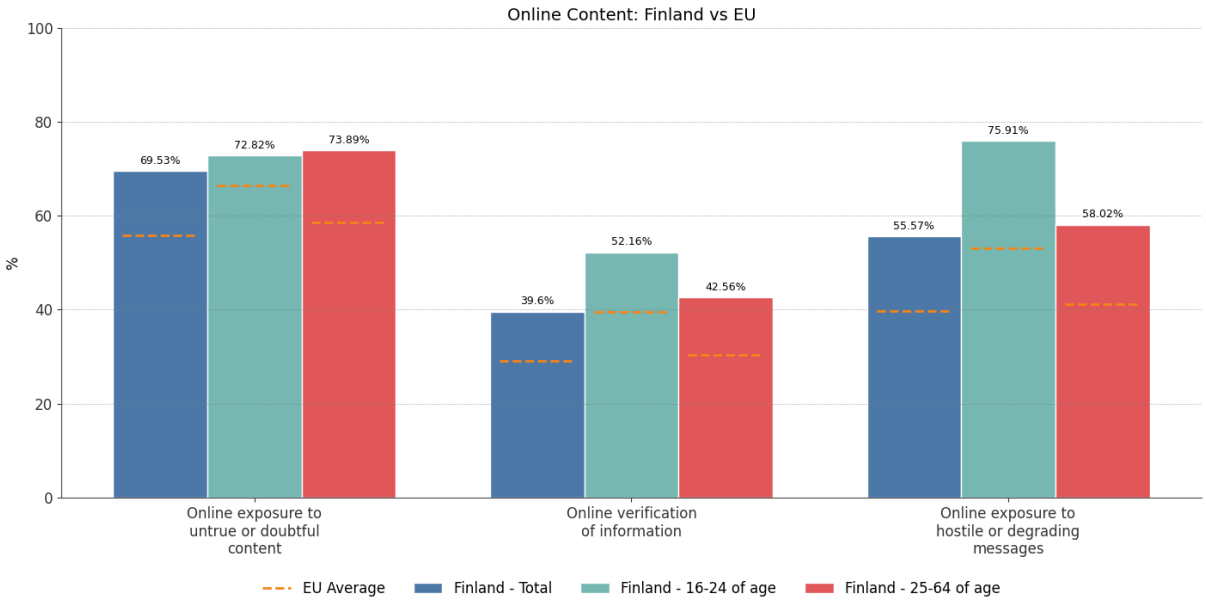
Finland's digital skills profile remains very strong, with results suggesting limited, yet noticeable disparities across various social groups. According to 2025 data, 80.98% of Finland's population aged 16-74 had at least basic digital skills (above the EU's 60.40%). This reflects a marginal annual growth of 0.6% since 2023 (compared to the EU's growth rate of 4.3%). The country is on track according to its trajectory presented in the Digital Decade national roadmap.

- **Gender gap**: Uncommonly, Finland's gender gap of 3.66 percentage points is in favour of women, with 82.82% of women and 79.16% of men possessing at least basic digital skills. This goes against the typical EU trend, where the gap averages 2.75 percentage points in favour of men.

- **Education level**: Unlike in many other EU Member States, digital skills levels vary little across different levels of education. Individuals with no or low formal education have a digital skills proficiency of 73.03%, which is significantly higher than the EU average of 37.56%. This figure represents a 7.95 percentage point gap compared to the national average, much smaller than the EU's 22.84 percentage point gap.
- **Living areas**: Finland's urban-rural divide is slightly higher than the EU average, but the results are much higher overall. In urban areas, 87.21% of individuals have at least basic digital skills, compared to 71.47% in rural areas, reflecting a gap of 15.74 percentage points. This is larger than the EU's urban-rural gap of 13.66 percentage points. However, both urban and rural figures for Finland surpass the EU averages of 66.50% and 52.83%, respectively.
- **Age groups**: The 25-54 age group has a proficiency rate of 90.21%, well above the EU average of 68.57%. The rate is slightly above the EU average for young people (16-24-year-olds), among whom 89.87% of individuals have at least basic digital skills. With 63.24%, the 55-74 age group has a significantly lower result, though this is still higher than the EU average of 42.6%.

Regarding **digital safety skills**, Finland excels, with 92.35% of individuals possessing at least basic safety skills, far above the EU average of 74.63%.

Finland's **use of generative AI** is ahead of the EU average. In 2025, almost half (46.27%) of Finnish people used all of the possibilities offered by generative AI, compared to the EU average of 32.66%. For professional purposes, 1 in 4 (25.11%) Finnish individuals used generative AI, surpassing the EU average of 15.36%. This highlights Finland's growing whole-of-society adoption of emerging technologies, which has the potential to impact future innovation. According to the Digital Decade Eurobarometer 2026, when asked about the most significant obstacles to using more generative AI tools, people in Finland pointed out 'concerns about accuracy or incorrect information' (41%), 'concerns about privacy or data protection' or said that they 'do not see a need to use generative AI tools' (32%).



In 2025, 69.53% of the Finnish population was **exposed to untrue or doubtful content online**, marking a slight decrease of 0.2% annually since 2023 (69.81%). Despite this decrease, Finland remains above the EU average of 55.90% (increase of 6.5% annually). Focusing on young people (16-24), 72.82% of

individuals in Finland were exposed to such content in 2025, a decrease from 79.6% in 2023, resulting in an annual decrease rate of -4.4%. This contrasts with the EU, where exposure for this age group increased from 61.66% to 66.34%, with an annual growth rate of 3.7%. In particular, in Finland, older adults (25-64) are more exposed than young people (16-24) (a gap of 1.07 percentage points), whereas in the EU, young people are more exposed (a gap of 7.77 percentage points). For the 25-64 age group, the figure in Finland remained stable at 73.89% in 2025, compared to 73.84% in 2023, whereas in the EU the number increased from 51.7% to 58.57%.

When it comes to **verifying information online**, 39.6% of individuals in Finland verified the truthfulness of online content in 2025, an increase of 1.7% annually from 38.31% in 2023. This places Finland above the EU average, which rose from 24.29% in 2023 to 29.16% in 2025 (+9.6% annually). However, young people were less likely to verify online content in 2025 (with 52.16% of them doing so) than in 2023 (61.12%). For older adults, the figure in Finland increased from 38.95% in 2023 to 42.56% in 2025, with an annual growth rate of 4.5%. The EU saw a larger increase, from 25.18% to 30.4% (+9.9% annually).

As regards **online exposure to hostile or degrading messages**, 55.57% people in Finland reported such exposure in 2025, an increase of 9.5% annually from 46.33% in 2023. This places Finland above the EU average, which rose from 33.5% in 2023 to 39.72% in 2025 (+8.9% annually). Among young people, 75.91% were exposed to such messages in 2025, an increase from 69.1% in 2023, resulting in an annual growth rate of 4.8%. The EU saw a larger increase, from 47.54% to 52.99% (5.6% annually). Both Finland and the EU show higher exposure among younger individuals, with Finland's gap being 17.89 percentage points and the EU's 11.85 percentage points. For older adults, the figure increased from 47.02% in 2023 to 58.02% in 2025, with an annual growth rate of 11.1%. The EU saw an increase from 34.53% to 41.14%, with an annual growth rate of 9.2%.

According to the **Digital Decade Eurobarometer 2026**, 91% of Finnish people agree that online manipulation (such as disinformation, foreign interference, AI-generated content and deepfakes) poses a threat to our democratic processes. In addition, when asked about the online issues with the biggest personal impact on them, people in Finland highlighted 'fake news and disinformation' (56%), 'misuse of personal data' (50%) and 'insufficient protections for minors' (36%). In relation to 'insufficient protections for minors', 96% think it should be a priority for the EU to further strengthen the protection of children and young people online.

Finland consistently shows higher percentages of individuals who recognise that they have been exposed to untrue or doubtful content, or hostile or degrading messages, and who verify online content compared to the EU averages. Young people in Finland experience more issues with veracity and the potential harm of online content and are also more likely to verify information than their EU peers. However, the decrease in the indicators since 2023 might suggest a need for stronger support for younger people to navigate information online. The good results of Finnish society overall compared to the EU average show solid media literacy across society and the potential to match it with even higher levels of digital skills.

Policy context and assessment of the recommendations

Finland's high performance in basic digital skills can be explained by multiple factors. The country has good access to connectivity infrastructure (in particular, mobile networks) and a solid integration of digital skills in school curricula from a young age. To ensure equitable development of learners' digital competence in basic education, the Finnish Ministry of Education is developing Descriptions of a Digitally Competent Teacher, a national framework for teachers' digital competence to be published in 2026. The framework emphasizes teachers' digital pedagogical skills and digital agency, and it will

inform both pre-service teacher education and ongoing professional development. Moreover, the Finnish society generally appreciates and practices lifelong learning, achieving top results in the EU[2]. Work is ongoing to support the population in adapting to technological change, for example through the national AI competence framework for 2025 and an upcoming framework for citizens. **The main divides in term of digital skills relate to age or to rural/urban areas.** Open-source digital skills certification and training possibilities exist, for example through Digital Support Open Badges, the Finnish Broadcasting Company YLE website or the Cyber Citizen project. Both the ESF+ and the JTF provide significant support (EUR 87 million) to building digital skills in order to promote employment and increase social inclusion. **Finland's population exhibits a high level of media literacy, characterised by cautious yet open engagement with digital technologies.** Beyond the indicators analysed above, the Nordic Media Literacy Survey provides insights into technology use. The cautious yet open engagement with technology is exemplified through the relationship with AI, where Finnish respondents are keener to use AI for testing rather than for the more common assistance in searching for information and writing assignments. They are also more likely to form an opinion about AI and are aware of the risks related to its usage. The informed approach to digital content consumption extends to awareness of countermeasures, such as reporting content, blocking senders or deleting browser search history. However, similarly to digital skills, targeted actions for vulnerable groups may help further deepen media literacy in Finland and broaden its reach.

Protection of minors online has become a topic of public debate and policy action. Early in 2026, the Finnish Institute for Health and Welfare and the Finnish National Agency for Education issued national recommendations on the recreational use of digital devices for children aged 0-13. These guidelines advise against giving smartphones to children under 13 and recommend that they do not use social media. Work is ongoing throughout 2026, with further recommendations planned for young people aged 13-18. In addition, lawmakers have discussed potentially banning social media for children under 15, suggesting a need to carefully analyse how similar bans would be implemented across the EU to inform future national actions.

ICT specialists

Performance assessment

ICT specialists account for 7.8% of total employment in Finland, which is the same result as they had in 2024, while still standing above the EU average of 5.0%. This figure remained the same as the year before at 7.8%. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

In terms of women ICT specialists, Finland had one of the highest shares in the EU with 24.30%, standing above the EU average of 19.50%. This figure slightly stagnated from 2024, when it was 24.4%. Out of total ICT graduates (9.2%), 2.3% were women, also among the highest rates in the EU. Even though Finland is performing well in comparison to other EU Member States, it is still far from reaching gender parity in the sector.

In 2024, 11.78% of enterprises in Finland recruited or tried to recruit personnel with ICT specialist skills (EU average: 9.55%). Moreover, 5.15% of enterprises declared that they had hard-to-fill vacancies for jobs requiring ICT specialist skills (EU average: 5.49%).

[2] See Finland's first rank in this European Innovation Scoreboard 2025, country profile Finland.

Policy context and assessment of the recommendations

Academic paths for ICT specialists are on the rise, yet the labour market's need for skilled professionals remains largely unmet. The Technology Industries of Finland estimated that its members will seek to employ more than 140 000 people over the next 10 years, with roughly three quarters of these roles requiring higher education qualifications, notably from universities of applied sciences. On the supply side, the percentage of ICT graduates grew from 8.3% in 2023 to 9.2% in 2024. It is unclear whether this is tied to a higher number of students or a relative rise due to an overall decline in tertiary education attainment – Finland's graduation rates still lag behind the EU average. Some higher education institutions are offering highly specialised paths, such as the quantum programme (3 years + 2 years) at Aalto University, which may help bridge the skills gap in the medium term. In addition, in 2024 the Finnish government launched a series of pilot projects for doctoral programmes that will last until 2027, having already allocated around 400 out of 1000 PhD positions in ICT in areas such as software engineering, quantum and artificial intelligence. These tech PhDs are frequently conducted in partnership with the private sector, such as the Technology Industries of Finland association. Most of the PhD projects support STEM disciplines more widely and should increase the attractiveness of doctoral studies leading to degree attainment.

Foreign employees with advanced digital skills could help fill skills gaps, especially as the country builds upon its long-standing reputation in ICT services and business increasingly seek technological innovation to drive growth. According to Finland's ICT Sector in 2025: Growth, Challenges, and Opportunities | ICTOulu, 43% of ICT firms plan to recruit internationally to meet the rising demands and 82% of the members of Technology Industries of Finland are interested in recruiting international talent over the next four years. As noted in the OECD economic surveys, attracting foreign talent in ICT could help increase Finland's productivity.

2025 recommendation on ICT specialists: Intensify efforts to attract ICT specialists, including those from abroad, by offering tailored training pathways, and addressing the gender gap in the field.
In 2025, Finland continued the implementation of existing measures but did not take any new measure. As outlined above, the policies remain in effect, with initiatives such as the PhD programmes now being implemented.

Key digital public services and solutions – trusted, user-friendly, and accessible to all

Performance assessment

In 2025, Finland's total digital public services score for citizens (which covers both national and cross-border users) reached 97.44 out of 100 points. This represents a 1.2% increase compared to 2024. As such, Finland is above the EU average of 84.64 out of 100. The country is on track according to its trajectory presented in the Digital Decade national roadmap. When looking specifically at digital public services for national citizens, Finland reached 98.73 out of 100 in 2025. This is above the EU average of 94.01 and has shown no change since 2024. For cross-border digital public services for citizens, Finland's 2025 score was 96.14 out of 100, above the EU's 75.28. Compared to 2024, this reflects a 2.4% increase. The country did not provide a national trajectory point for 2025 in the Digital Decade national roadmap. While four Citizen-related life events (Starting a small claims procedure, Moving, Career, and Studying) score a full 100 points, life events such as Health i(86.50), Family (97.20) and Transport (98.30) show the most room for improvement. Across levels of government for national citizens' digital public services, central government services scored 90.0 out of 100, regional government services scored 100 and local government services scored 74.17 out of 100.

Finland

Finland's total digital public services score for businesses (covering both national and cross-border businesses) was 98.75 out of 100 in 2025, standing above the EU average of 88.59 out of 100 points. This represents no change from 2024. The business-related life event scoring particularly well is Business Start-Up (100.0), whereas Regular Business Operations (97.5) show the most room for improvement. Finland's cross border digital public services score for businesses reached 97.50 in 2025, reflecting no change compared with 2024. These results are above the EU average of 78.37. On the other hand, digital public services for businesses available to national users in Finland scored 100.0, placing the country above the EU average of 98.81 out of 100.

Across the two Digital Decade KPIs, Finland's digital public services for businesses indicator performs better than its counterpart for citizens. This stronger performance is underpinned by digital public services for businesses available to national users, which forms the most mature component of the KPI, even as cross-border digital public services for businesses remains less developed. Recent progress has been driven primarily by improvements in digital public services for businesses available to national users, reflecting stability across the KPI. While life events such as Starting a small claims procedure, Moving, Career, Studying and Business Start-Up perform best, lower-scoring areas such as Health, Family and Transport do not yet exhibit the same level of maturity.

Overall, Finland's alignment with EU levels varies across the two Digital Decade KPIs, with strengths concentrated in national services and weaker performance in cross-border delivery. Notably, Finland has suffered difficulties and delays with deploying the necessary decentralised IT systems that form the basis for the Justice Digital EXchange system, a key reform for the digitalisation of cross-border public judicial services. A similar pattern appears across government tiers, where local administrations are showing the greatest need for improvement. Despite these gaps, the underlying direction of change indicates Finland is on a positive upward trajectory toward achieving the 2030 digitalisation targets.

Finland's access to e-Health records reaches a score of 91.37 after growth of 7.88%, above the EU average of 86.51. The country did not provide a national trajectory point for 2025 in the Digital Decade national roadmap

Policy context and assessment of the recommendations

Finland is making steady progress in implementing the revised eIDAS Regulation. A national legislative proposal is nearing completion and technical specifications for the EU Digital Identity (EUDI) Wallet are being finalised. Finland completed the process of notifying the eID for cross-border authentication under the eIDAS regulation. The notification was published in the *Official Journal of the European Union* in April 2025. Finland then implemented some of the national technical requirements identified in the peer-review process. The Digital and Population Data Services Agency (DVV) is overseeing the wallet's deployment, while Finland prepares to launch a digital ID card, the first qualified electronic attestation of attributes for the EUDI Wallet.

To further streamline regional integration, Finland is collaborating with Nordic and Baltic partners to develop a shared EUDI Wallet certification scheme. The aim is to foster a competitive market for conformity assessment bodies and facilitate cross-border wallet deployment. Additionally, the Ministry of Finance is coordinating Finland's response to the Commission's proposed European Business Wallets regulation, following extensive stakeholder engagement. Finland endorses the proposal and emphasises the need to promote Business Wallets for both private-sector transactions and public-sector interactions. At the same time, automation capabilities need to be ensured, and

regulatory requirements balanced to maximise adoption among economic operators. The goal is to create a seamless, interoperable digital identity ecosystem that supports business efficiency and public-service accessibility.

Finland aims to develop a single-entry point portal for an entire life event related to the death of a loved one. According to the target schedule, the new service and the necessary legislation will come into force in February 2027. Additionally, Finland is also advancing the Digital First project, which aims to ensure that official communications from public authorities are primarily delivered digitally. Official mail sent by public authorities will therefore chiefly be received through digital channels rather than on paper. Starting in April, official communications will automatically be delivered to a digital mailbox on the platform (unless this service is disabled). These communications may include, for example, tax declarations, traffic penalty decisions, municipal decisions, and decisions related to a child's education, among others. Furthermore, Finland is also mapping other potential development initiatives by using service design and collecting user experiences. This approach has been applied to key life and business events, such as moving into the country, starting a business, and handling a criminal case.

Sitra, the Finnish Innovation Fund, is significantly scaling up its efforts to transform public-sector productivity through a EUR 50 million investment programme running until 2028, marking a tenfold increase in funding compared to previous levels. This initiative aims to drive systemic reforms and widen the adoption of solutions to improve efficiency, with a particular focus on wellbeing services as part of its productivity for the public-sector programme. Complementing this, Sitra's Digisote project is specifically designed to improve productivity and service effectiveness within social and healthcare systems. To further advance these goals, Sitra will launch a targeted funding call in early 2026, dedicated to social welfare and healthcare, which will prioritise the expansion of proven AI-driven solutions to deliver tangible improvements in service delivery and operational efficiency.

In 2026, Finland made strides to further introduce AI into its healthcare system. In the Future of Health Data in the Age of AI report, published by Sitra in February 2026, it was announced that Finland should create a national health data space (Finnish Data Space, FHDS) to address the financial and staffing challenges in social and healthcare services as well as to resolve fragmented data management. Finland's health data space merges infrastructure, permitting and RDI to tackle rising healthcare demands, fuelled by an ageing population and multi-morbidity, through AI-driven cost savings and service improvements. Despite having the world's richest healthcare data, fragmented silos and slow permitting stifle its potential to make use of AI in the sector. Finland offers a national e-Health app (OmaKanta). However, it is not popular and has, since its launch, only been downloaded roughly 100 000 times. This is a low number considering that Finland's web services had 3.2 million different users in 2025.

Leveraging digital transformation for a smart greening

Finland reports some of the lowest ICT-sector air emissions in the EU and is among the leading Member States in electronic equipment recycling. Recently published sectoral data on air emissions show that Finland's ICT sector emitted 2.1 kg CO_2 eq per capita in 2022, which is the lowest reported emission among all EU Member States and considerably below the EU average of 22.8 kg CO_2 eq. Most of these emissions come from ICT services activities, emitting an equivalent of 1.1 kg CO_2 eq per capita. Furthermore, 89.92% of ICT-related waste collected (corresponding to two categories of waste electrical and electronic equipment) was recycled or prepared for reuse, representing one of the highest rates in the EU (EU average: 80.23%).

LUMI continues to set an example of how supercomputing can be sustainable without compromising performance. It powers several transformative and sustainable projects. Among these are Destination Earth, a high-precision digital twin of Earth that enables researchers to simulate and forecast climate change with unprecedented accuracy, and BioDT, which develops digital models of biodiversity to inform ecosystem protection strategies, and is the computational backbone for the LUMI AI Factory. The LUMI supercomputer sets a benchmark for sustainable computing by running on 100% renewable electricity, using energy-efficient liquid cooling that recovers over 34 100 MWh of waste heat annually (covering 10% of Kajaani's district heating needs). It leverages natural cooling conditions, repurposes an old paper mill to cut construction emissions by 80% and conforms to EU procurement standards that prioritise energy efficiency and environmental protection.

Finland is accelerating its green and digital transition through the EU-funded FINEX project, a two-year Horizon Europe initiative uniting partners from Estonia, Latvia, Lithuania, Bulgaria, Cyprus and Finland. The project aims to transform participating regions into competitive cleantech hubs by fostering more collaborative, internationally connected innovative ecosystems. Beyond strengthening cross-border partnerships, FINEX advocates for improved EU regulatory, fiscal and legal frameworks to better support deep-tech innovation. By providing access to specialised testing infrastructure and services, the initiative helps bridge the gap between research and real-world deployment, enabling innovators to scale climate-neutral solutions and contribute to Europe's net-zero ambitions.

Regarding people's perceptions of AI, according to the Digital Decade Eurobarometer 2026, **85% of Finnish people think AI should be developed as a priority in an environmentally sustainable way** (e.g. using renewable and clean energy). In addition, 49% consider 'green digital technologies (e.g. energy-saving tech)' as the technology which will have the most positive impact in the next 10 years.

Annex I: National roadmap analysis

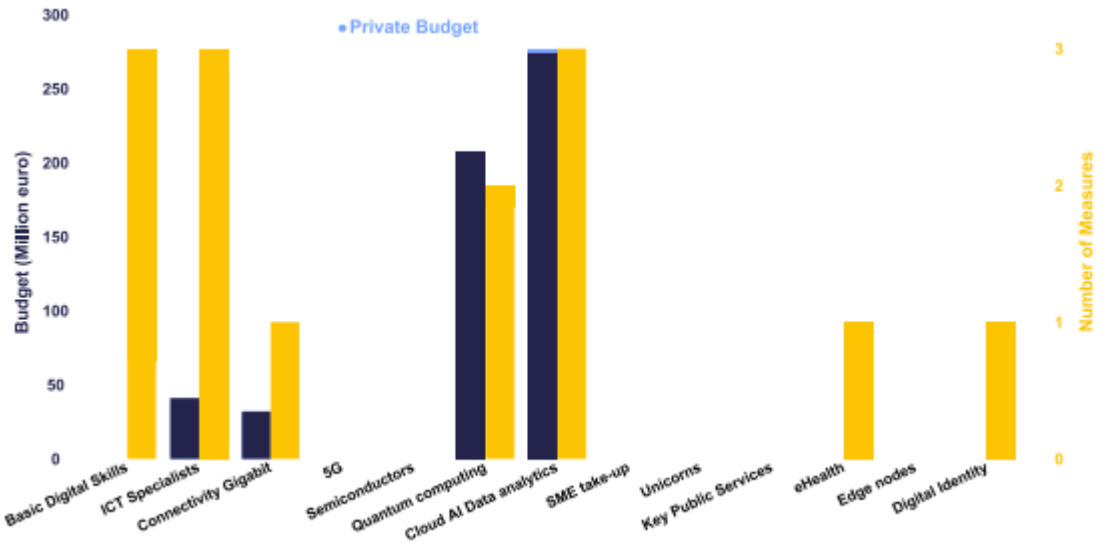
Finland's national Digital Decade strategic roadmap

Finland submitted an addendum to the Digital Decade roadmap on 29 November 2024. It includes an additional measure, revised measure descriptions, new targets and revised trajectories. The addendum, like the original roadmap, is based on Finland's Digital Compass and its yearly implementation plans which comprehensively address digital actions by the country. The content of the roadmap and its update have been developed in close cooperation with stakeholders, as part of regular consultations conducted, in particular, by the Coordination Group for Digitalisation (the 'Digital Office').

Finland provided the requested trajectories except for e-Health and added a FTTP target accompanied by a trajectory. Regarding edge nodes, the country argues there is no database or public influence allowing for a target. Regarding unicorns, Finland did not consider it appropriate to set a separate national target and considers it more important that the EU is an attractive and competitive environment.

Finland raised the national target for basic digital intensity of enterprises from 90% to 95%, above the EU ambition level. Finland added a measure related to e-Health. In addition, Finland, mapped supporting broadband deployment in rural areas, which was absent in the initial roadmap. Finland added a budget description for some existing measures. Some links between the measures and the corresponding Digital Decade rights and principles was provided. The roadmap clearly reinforces Finland's contribution to the Digital Decade objectives of tech leadership, sovereignty, and green ICT.

Measures and budget in the national roadmap[3]



Overall, Finland presents a non-exhaustive list of policies and measures that will contribute to achieving each of the Digital Decade targets. All targets align with the EU-level goals for 2030, and two are set higher: a target of 87% for basic digital skills and a target of 95% for basic digital intensity of SMEs. The measures presented also cover several types of objectives: technological leadership, sovereignty, competitiveness, and the green transition. In total, the **14 measures** have **a budget of EUR 559 million, equivalent to 0.2% of GDP.** The roadmap also underlines the importance of RDI activities, by offering possibilities in multiple areas (e.g. 5G, semiconductors, quantum, and to some extent, AI).

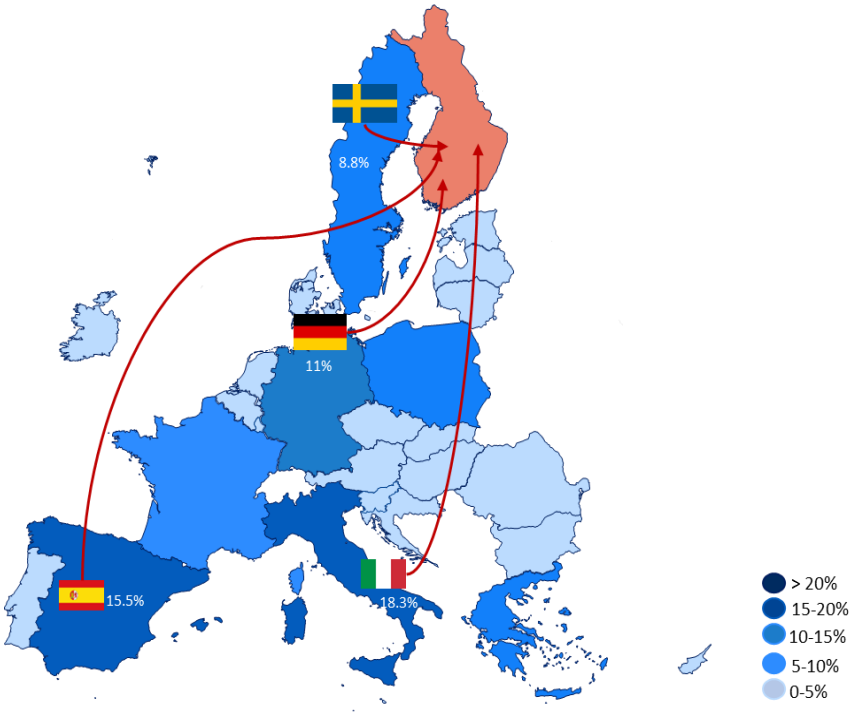
3 When referring to national roadmaps, data used in this report are those declared by the Member States in their national roadmaps, on the basis of the Commission's guidance (C(2023) 4025 final). Data might reflect possible variations in reporting practices and methodological choices across Member States. No systematic assessment of the extent to which Member States followed the guidance was carried out.

Annex II: Funding, economic impacts & Multi-Country Projects

Country results from the study 'Assessing the Economic Impact of Digital Investments under the Recovery and Resilience Facility'

A modelling study conducted by the European Commission services, with the FIDELIO model, assesses the economic impact of the digital component of the RRF. As of November 2025, the digital part of the Recovery and Resilience Plan of Finland was evaluated to EUR 526 million with EUR 57 million for digital infrastructures, EUR 39 million for digital skills, EUR 50 million for the digitalisation of businesses, EUR 232 million for the digitalisation of public services, and EUR 147 million for other digital priorities.

The total economic impact of RRF digital measures is estimated to EUR 2.07 billion for the national economy. Of this, EUR 1.46 billion stems from the direct effects of Finland's own RRP and EUR 608 million corresponds to spillover effects from the implementation of other EU Member States' plans. Finland benefited the most from spillover effects from RRPs of Italy (EUR 111 million), Spain (EUR 95 million), Germany (EUR 67 million). The most impacted sectors are Manufacturing (EUR 544 million), Professional Services (EUR 332 million) and Construction (EUR 319 million).



RRF spillover effects to Finland

Finland

Funding from the Recovery and Resilience Facility (RRF) & Cohesion Policy

Finland allocates 29% of its total recovery and resilience plan to digital (EUR 0.5 billion)[4]. In addition, under cohesion policy, EUR 0.4 billion, representing 19% of the country's total cohesion policy funding, is dedicated to advancing Finland's digital transformation[5].

Multi-Country Projects

Finland is a member of the Alliance for Language Technologies EDIC, and is an observer to the Digital Commons EDIC, and is also supporting working towards setting up an EDIC in the area of agri-food. Finland is directly participating in the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT). Finland is a participating state of the EuroHPC Joint Undertaking (JU) and of the Chips JU.

[4] The share of financial allocations that contribute to digital objectives has been calculated using Annex VII to the Recovery and Resilience Facility Regulation. Last data update: 23 April 2026.

[5] This amount includes all investment specifically aimed at or substantially contributing to digital transformation in the 2021-2027 Cohesion policy programming period. The source funds are the European Regional Development Fund (including Interreg), the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.