EUROPEAN
COMMISSION

Brussels, 17.6.2026
SWD(2026) 155 final

PART 20/27

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

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Executive summary

The Netherlands remains a leader in digitalisation, supported by excellent connectivity, a strong research base and a leading position in high-technology areas. However, these strengths are not yet widely felt across all businesses. SMEs continue to lag behind in the strategic use of advanced digital technologies, partly as a result of a lack of skills and limited financial resources, while the shortage of ICT specialists further constrains digital transformation. The tech start-up sector is also showing signs of slowing down. Digital skills, online safety and trusted public services remain important priorities. However, some structural issues continue to slow progress, including ongoing fragmentation in the delivery of public services, where government organisations operate separate systems and data infrastructures.

Overall, despite its strong technological base, the Netherlands has not fully translated its leadership in innovation into widespread productivity growth, limiting its potential to drive long-term economic development and **competitiveness**. The Netherlands now finds itself at a key moment of transition: its strengths and weaknesses have been clearly identified (including in Peter Wennink's report), and a new government and several strategic initiatives provide momentum to build on them. These initiatives include the coalition agreement; the Netherlands Digitalisation Strategy (NDS), which for the first time establishes a shared whole-of-government vision for digitalisation and interoperability; a renewed industrial policy for key sectors such as semiconductors and biotechnology; and a target to raise R&D investment to 3% of GDP by 2030. The key challenge now is to turn this policy momentum into economy-wide impact, while ensuring consistency across initiatives and avoiding fragmentation.

Finally, the Netherlands is a global leader in **digital innovation** in key high-tech areas. It has an exceptionally strong and specialised semiconductor ecosystem, built on long-standing investments and expertise that make the country a critical node in the production of advanced chips. However, these strengths are concentrated among a few players, creating strategic vulnerabilities in an increasingly fragmented geopolitical context. Recognising this, the government has repeatedly emphasised the need to maintain control over critical infrastructure to strengthen **digital sovereignty** – including in the December 2025 vision on digital sovereignty and in the non-paper on 'Strengthening cloud sovereignty of public administrations' adopted in July 2025. The government is also supporting the development of initiatives such as the Artificial Intelligence (AI) Factory in Groningen to expand access to computing power and innovation capacity for businesses.

The Netherlands in the Digital Decade

The Netherlands shows a high level of ambition in its contribution to the Digital Decade, with 10 national targets (out of 14), 90% of which are aligned with the EU 2030 targets. In its national roadmap, it provided 10 trajectory points for 2025 (out of 13 analysed). It is following these trajectories well and is on track for 80% of them. The Netherlands addressed 80% of the 5 recommendations issued by the Commission in 2025, either by implementing significant policy changes (40%) or making some changes (40%) through new measures. According to the national roadmap, **29% of the measures are set to expire** by the end of 2026. The total public budget allocated to these measures is EUR 170 million, representing 3% of the total public budget outlined in the roadmap.

The Netherlands

According to the special **Eurobarometer on the Digital Decade 2026**, **86% of Dutch people consider that digital policy should have a very high or high priority for the EU**. They also think that, in the next 10 years, the EU should cooperate with Member States to reinforce cybersecurity and protection from online threats (95%), promote digital education and skills programmes (85%) and build an independent European digital infrastructure (broadband, 5G cloud, semiconductors) (84%). In addition, **85% of Dutch respondents think that the EU should reduce its dependence on digital technologies from third countries**, and 90% think that the EU should prioritise investment 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

The Netherlands allocates 28% of its total funds under the recovery and resilience plan to digital (EUR 1.1 billion). In addition, under the cohesion policy, EUR 0.2 billion is dedicated to advancing the Netherlands' digital transformation. This represents 10% of the country's total cohesion policy funding.

The Netherlands is a member of the 'Alliance for Language Technologies' European Digital Infrastructure Consortium (EDIC), the 'Local Digital Twins towards the CitiVERSE' EDIC, the 'Innovative Massive Public Administration interConnected Transformation Services' (IMPACTS) EDIC and the 'Digital Commons' EDIC. The Netherlands participates directly in the important project of common European interest (IPCEI) on Microelectronics and Communication Technologies and in the IPCEI on Next Generation Cloud Infrastructure and Services (IPCEI-CIS). It is also a participating state in the EuroHPC Joint Undertaking (JU) and in the Chips JU.

Digital Decade KPI (1)	The Netherlands				EU		Digital Decade target by 2030	
	Last available data (2)	DESI 2026 (year 2025)	Annual progress	National trajectory 2025 (3)	DESI 2026	Annual progress	NL	EU
Fixed Very High-Capacity Network (VHCN) coverage	98.4%	98.7%	0.3%	98.3%	85.5%	3.7%	100.0%	100%
Fibre to the Premises (FTTP) coverage	85.3%	91.5%	7.2%	-	74.1%	7.1%	-	-
Basic 5G coverage	100.0%	100.0%	0.0%	100.0%	96.8%	2.6%	100.0%	100%
Edge Nodes (estimate, new methodology)	-	368	-	-	7 451	-	-	10000
SMEs with at least a basic level of digital intensity *	82.7%	88.8%	3.6%	81.7%	71.4%	11.0%	95.0%	90%
Cloud *	60.4%	65.8%	4.4%	74.0%	46.7%	9.5%	85.3%	75%
Artificial Intelligence	23.1%	33.2%	44.0%	32.0%	20.0%	48.0%	85.1%	75%
Data analytics *	50.8%	56.0%	5.0%	54.5%	39.9%	9.5%	75.0%	75%
AI or Cloud or Data analytics *	74.6%	79.7%	3.3%	-	63.2%	7.5%	-	75%
Unicorns	36	37	2.8%	-	324	10.2%	-	500
At least basic digital skills *	82.7%	83.6%	0.5%	86.5%	60.4%	4.3%	100.0%	80%
ICT specialists	7.0%	7.2%	2.9%	8.0%	5.0%	2.0%	9.2%	~10%
e-ID scheme notification		Yes						
Digital public services for citizens	88.5	90.7	2.4%	87.8	84.6	2.8%	100.0	100
Digital public services for businesses	88.8	89.4	0.8%	87.8	88.6	2.7%	100.0	100

Access to electronic health records	65.2	69.3	6.4%	-	86.5	4.6%	-	100

(1) Indicators full description, metadata and sources in the DESI 2026 methodological note
(2) Last available data is 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

The Netherlands is performing very well on **connectivity**, with only a few scattered rural households still lacking fibre or high-quality gigabit access. On advanced digital technologies, it is well established in **semiconductors** and strengthening its position in **quantum technologies** through continued support for research, combined with increased emphasis on practical applications and talent development via the flagship Quantum Delta NL programme. While these efforts are promising, there is currently no defined funding trajectory beyond 2028, when the programme is due to phase out. At business level, **SMEs** show relatively high levels of basic digitalisation compared with their EU peers, although the transition from basic use to more strategic integration of digital technologies is still a work in progress. This is particularly evident in the **adoption of AI and other advanced digital technologies**, where more companies are recognising the need to invest for strategic and sovereignty reasons, but continue to face constraints related to skills, resources and access to infrastructure. Existing support structures, including the European Digital Innovation Hubs (EDIHs) and the planned AI Factory in Groningen, are intended to provide access to expertise, computing capacity and support for experimentation and adoption. However, their impact is constrained by limited coordination at regional and national level. The Dutch **tech ecosystem** is also starting to show some structural issues, with a slowdown in new start-up creation and a decline in investment rounds. Efforts are being made to mobilise institutional capital to support scale-ups but ensuring a more stable investment environment remains a challenge. Finally, Dutch people and businesses show strong cyber awareness and preparedness. However, the increasingly complex and unpredictable **cybersecurity** environment is placing growing pressure on municipal budgets, while challenges remain in role allocation, information sharing and the consistent implementation of security standards across different levels of government.

Protecting and empowering EU people and society

The level of basic **digital skills** among the Dutch population remains generally strong, supported by efforts to introduce ‘Digital Literacy’ as a distinct area of learning in primary and secondary education. However, challenges remain in reaching low-educated individuals, older adults and young people, who are more commonly exposed to online risks. The **share of ICT specialists in employment** is also above the EU average, yet the labour market faces a significant supply-demand imbalance. This is due to many factors, including an ageing population, a high prevalence of part-time workers, a deterioration in the quality and funding of higher education, a lack of teachers, gender disparities and misconceptions about science, technology, engineering and mathematics (STEM) careers. These structural constraints are compounded by uneven access to talent across companies and regions, with SMEs and peripheral areas disproportionately affected. The recent coalition agreement places strong emphasis on talent development and retention, as well as lifelong learning and strengthening education and skills systems to better meet labour-market needs. It also signals measures to support the attraction of international talent and improve conditions for workers already in the labour market. These commitments reflect a focus on strengthening the ICT talent pipeline, although concrete implementation measures and funding remain to be defined. In terms of **public services**, the Netherlands performs strongly in digital uptake and availability, but service delivery remains fragmented as different government organisations continue to operate separate systems and data infrastructures. The Netherlands Digitalisation Strategy offers an opportunity to move towards more unified and interoperable public services. Fragmentation is also visible in healthcare digitalisation, where progress is solid but key gaps remain. These include the lack of a comprehensive national overview of which hospitals share health data and the fact that access for legal guardians, while legally provided for, is not yet technically feasible in practice.

Recommendations

- **ICT specialists:** Address the digital talent shortage by attracting STEM students and retaining them in the workforce. In particular: (i) enhance student participation in STEM through early, targeted career guidance in schools and measures to reduce gender imbalances; and (ii) intensify efforts and investments to attract and retain ICT specialists, particularly in sectors with high digital potential.
- **Adoption of advanced digital technologies:** Increase SME adoption of advanced digital technologies by strengthening the coordination and effectiveness of existing support systems. In particular: (i) expand the role of European Digital Innovation Hubs (EDIHs) beyond advisory services to help SMEs identify needs, develop practical use cases and support the full adoption process from testing to integration; and (ii) improve coordination between EDIHs, local digitalisation initiatives (e.g. the ‘Local Digital Twins towards the CitiVERSE’ EDIC) and national digital infrastructure (including the AI Factory in Groningen) to enable real-world testing, scale successful solutions, avoid duplication of efforts and provide SMEs with clear and standardised access pathways to available support and facilities.
- **Digital public services and e-Health:** Strengthen digital public services and e-health through coordinated governance, interoperable data systems and improved access to digital health services. In particular: (i) establish an implementation roadmap under the Netherlands Digitalisation Strategy with clear milestones and a multi-year funding framework; (ii) simplify and standardise data-sharing rules to operationalise the ‘once-only’ principle and reduce fragmentation in public service delivery, while aligning with European interoperability standards and relevant EU initiatives such as IMPACT-EDIC; and (iii) expand access to digital health services by making more types of health data available, increasing participation by healthcare providers and enabling appropriate access for patients’ legal guardians.
- **Semiconductors:** Strengthen the semiconductor and deep tech ecosystem by building on the Brainport Eindhoven cluster while supporting more balanced national development. In particular: (i) reinforce the innovation capacity of key semiconductor clusters, including through R&D and pilot infrastructure and by leveraging relevant EU programmes such as IPCEI on Microelectronics and Communication Technologies and the Chips Joint Undertaking; (ii) support the development of complementary regional innovation ecosystems in other parts of the country through closer cooperation between companies,

universities and applied research organisations; and (iii) address skills and talent shortages by facilitating the attraction and retention of highly skilled workers in the sector.

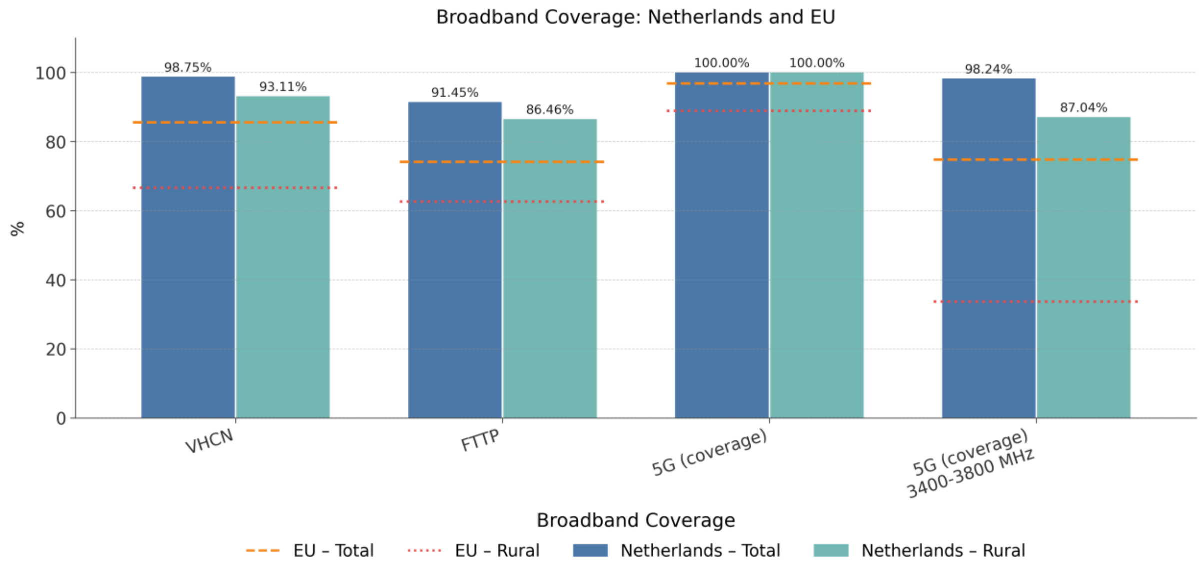
- **Quantum technologies:** Consolidate the country's leadership in quantum, including by: (i) securing public and private funding beyond the Quantum Delta NL horizon (2028) to avoid a financing cliff; (ii) strengthening support for the global scale-up of Dutch quantum start-ups; and (iii) deepening cross-border collaboration to contribute to the building of a European quantum supply chain.
- **Cybersecurity:** Strengthen national cybersecurity resilience by improving coordination and reducing fragmentation across responsible authorities. In particular: (i) enhance structured information-sharing between national authorities and Computer Security Incident Response Teams (CSIRTs); and (ii) ensure effective implementation of cybersecurity requirements for critical infrastructure.

A competitive, sovereign and resilient EU based on technological leadership

Building technological leadership: digital infrastructure and technologies

Connectivity infrastructure

Performance assessment



In 2025, the Netherlands achieved a Fixed Very High-Capacity Network (VHCN) coverage of 98.75%, which is above the EU average (85.54%). It experienced a growth rate of 0.30%, lower than the EU's 3.70%. For households in rural areas, VHCN coverage was 93.11% in 2025, well above the EU average of 66.66% and an improvement since 2024 (88.38%). The country is on track according to the trajectory set out in its Digital Decade national roadmap.

The Netherlands performed well in Fibre-to-the-Premises (FTTP) coverage, achieving 91.45% coverage in 2025 (well above the EU average of 74.13%), an increase of 7.20% from 85.35% in 2024**.** For households in sparsely populated areas, the Netherlands' FTTP coverage was 86.46% in 2025, higher than the EU average of 62.61% and a significant improvement since 2024, with a 9.7% growth (higher than the EU's 6.50%). The country did not provide a national trajectory point for 2025 in the Digital Decade national roadmap.

The Netherlands maintains 100% basic 5G coverage, including in sparsely populated areas, and is therefore on track according to the trajectory set out in its Digital Decade national roadmap**. 5G coverage in the 3.4–3.8GHz band decreased slightly in 2025 to 98.24% of households** (from 99.37% in 2024). **5G coverage in that band also decreased from 97.83% in 2024 to 87.04% in 2025 in sparsely populated areas.** This is due to a correction of a previous inaccuracy, as the Competent Authority rechecked the values with operators and identified over-reporting in previous years.

Overall, **the Netherlands consistently maintains higher coverage rates than the EU average across all key performance indicators**. It also showed good growth rates, particularly in FTTP coverage in sparsely populated areas. For VHCN coverage, the growth rate is slower than the EU average, likely indicating it is approaching saturation point.

The table below provides an overview of VHCN, FTTP and basic 5G coverage across NUTS-2 regions in the Netherlands. It reveals that **connectivity coverage is strong across all Dutch regions across all three KPIs**, with only a few minor differences observed in Groningen and Zeeland.

	VHCN coverage		FTTP Coverage		5G Coverage	
	Overall	Rural	Overall	Rural	Overall	Rural
National coverage	98.75%	93.11%	91.45%	86.46%	100.00%	100.00%
Drenthe	99.20%	94.95%	96.35%	90.80%	100.00%	100.00%
Flevoland	99.00%	91.50%	94.72%	88.38%	100.00%	100.00%
Friesland (NL)	99.14%	98.01%	92.29%	96.40%	100.00%	100.00%
Gelderland	99.26%	96.72%	95.34%	91.61%	100.00%	100.00%
Groningen	97.44%	70.44%	81.98%	58.83%	100.00%	100.00%
Limburg (NL)	99.28%	93.99%	94.72%	82.39%	100.00%	100.00%
Noord-Brabant	98.80%	94.31%	94.39%	85.16%	100.00%	100.00%
Noord-Holland	98.77%	89.63%	88.45%	81.18%	100.00%	100.00%
Overijssel	98.60%	96.35%	94.59%	95.43%	100.00%	100.00%
Utrecht	98.40%	91.23%	93.32%	77.81%	100.00%	100.00%
Zeeland	97.40%	71.46%	85.76%	62.43%	100.00%	100.00%
Zuid-Holland	98.62%	93.92%	88.22%	85.30%	100.00%	100.00%

In terms of take-up, 15.03% of fixed broadband subscriptions were at speeds of 1 Gbps or higher in 2025, standing below the EU average of 26.97%. However, the annual growth rate for the Netherlands (42.8%) was significantly higher than the EU average growth rate of 21.2%.

In 2025, the Netherlands led the way with a 5G SIM cards uptake of 137.24% (as percentage of the total population)[1], greatly above the EU average of 55.55%. The annual growth rate for the Netherlands (7.7%) was lower than the EU average growth rate of 56.2%, indicating that it has reached saturation point.

Policy context and assessment of recommendations

The Netherlands continues to display a strong connectivity infrastructure, with fibre and basic 5G coverage levels that are well above the EU average. The country's good performance can be explained by several favourable structural factors, such as geography and a highly digitalised society. These are combined with a long-standing policy approach and market choices that have resulted in effective competition between telecom operators and substantial private investments. The Netherlands benefited early-on from a dense legacy infrastructure (extensive cable networks), as well as highly dense urban settings. This has significantly reduced the fibre and mobile deployment costs for individual premises. Governments have also systematically favoured the development of a highly digitalised and well-connected economy, facilitating local permitting and coordination with local administrations. Overseen by the Authority for Consumers and Markets (ACM), the regulatory framework has fostered effective competition between different players, while also ensuring effective wholesale access to the incumbent's fixed network.

[1] Note that the percentage of the population with 5G SIM cards can exceed 100% because people can have more than one SIM card.

Over recent years, fibre and other broadband connections have continued to grow. According to ACM's latest Telecom Monitor (published in the fourth quarter of 2025), 8.94 million fibre-optic connections have now been rolled out (up from 8.26 million in the same quarter of 2024), with active subscriptions in place at 3.64 million addresses (up from 3.19 million in the same quarter of 2024). Mobile data consumption also hit a record high, reaching 829 million gigabytes in the fourth quarter of 2025.

While the Netherlands has largely succeeded in minimising the digital divide between urban and rural areas, there are still a few scattered rural households that lack fibre or high-quality gigabit connectivity. Regions and provinces have played an important role in facilitating broadband connections in underserved areas, but there is still room for improvement in some very isolated locations. According to the latest data from the Ministry of Economic Affairs and Climate, there were about 18 000 hard-to-reach households still not covered by fixed fast internet at the end of 2025. The estimate is that market-driven rollout will bring this down to 12 000 households by 2028. Fixed wireless access or satellite internet may serve as (interim) solutions for these hard-to-reach rural households.

On pricing and contracts, ACM found that information asymmetry and 'passive' contract structures cause consumers with low-speed internet subscriptions to pay disproportionately high prices. In its recently published market study, ACM highlights that consumers with low-speed internet (up to 100Mbps) often pay more than those with higher speeds, not because of higher starting prices but because many are stuck in automatically renewed 'passive' (or 'dormant') contracts where annual price increases accumulate over time. This problem is reinforced by poor transparency from telecom providers about contract status, price increases and renewal options. Although switching providers is easy, many consumers do not act because they lack information. ACM plans to improve information rules and enforcement and has urged telecom providers to be more transparent with customers on speed needs and contract renewal options. On the regulatory side, ACM mentions the possibility of lawmakers introducing new rules requiring equal and transparent pricing for comparable internet services. At government level, there is currently no plan to implement a nationwide 'social internet' scheme, as an investigation into Dutch internet prices confirms that they are generally low to average compared with other EU countries. Nevertheless, targeted local measures (similar to the Rotterdam pilot) could help support households that lack suitable financial means to pay for their internet subscriptions.

The switch-off of copper networks is gathering pace. Following the principle of 'fibre on, copper off', the incumbent operator is progressively switching off its copper network in areas where its fibre network is already present, although it has not set a deadline for full copper network closure. The incumbent also declared that copper networks may remain in areas where fibre migration is not yet complete. The Telecom Monitor shows that there were 1.37 million active copper subscriptions in the third quarter of 2025.

Semiconductors

The Netherlands plays a distinctive role in the global semiconductor ecosystem, driven primarily by its leadership in critical enabling technologies and equipment, rather than by large-scale chip manufacturing. The sector is centred on a small number of globally leading firms producing highly specialised machines (e.g. EUV lithography systems) that are difficult to imitate, equipment design, materials and software sold worldwide. These firms make the Netherlands indispensable to advanced chip production at a global level, even though only a limited share of their manufacturing takes place within the Netherlands.

The Netherlands

The Netherlands' high degree of specialisation in semiconductor equipment provides the country with significant strategic influence within the global semiconductor ecosystem. At the same time, the broader semiconductor supply chain remains geographically fragmented, exposing the Netherlands – along with other EU countries – to risks associated with external dependencies. The recent Nexperia affair illustrates these vulnerabilities in practice: although the company is not a leading chip producer, its role in strategic supply chains and its ownership by the Chinese group Wingtech raised national security concerns in the Netherlands, leading the Dutch government to intervene and restrict certain strategic activities at the end of 2025. Similarly, earlier in 2025, the Dutch government introduced stricter licensing and export control measures requiring authorisation for the export of advanced semiconductor manufacturing technologies outside the EU. These developments demonstrate how, in the Dutch context, companies occupying key positions in the semiconductor value chain can become strategically sensitive even when they do not manufacture chips directly, increasingly framing semiconductor policy as a matter of national security and strategic autonomy.

Against this backdrop, strengthening technological capabilities and expanding strategic capacity have become central priorities for the Dutch semiconductor system. ASML, for instance, has invested beyond its core lithography technologies to reinforce its long-term technological leadership, particularly in computational software and AI (including through a strategic partnership with the French company Mistral AI, supported by a EUR 1.3 billion investment). By integrating AI into its operations, ASML aims to enhance system performance and accelerate innovation cycles, while potentially reshaping part of its workforce. At the same time, the company is expanding its physical capacity through the development of a new industrial campus in Eindhoven intended to accommodate a projected 20 000 new employees. This expansion is closely linked to the government-supported Beethoven project, under which a total of EUR 2.51 billion has been committed to facilitate the continued growth of the Dutch semiconductor sector.

The Netherlands also has one of Europe's most dynamic semiconductor R&D ecosystems, driven by academic excellence and a high level of investment by larger companies. Leading institutions such as Delft University of Technology, Eindhoven University of Technology and the University of Twente continuously produce a strong pipeline of specialised graduates, particularly in the fields of semiconductors and photonics. Semiconductors represent up to a third of all private-sector R&D investments in the country, with the big five Dutch semiconductor players representing 80% of the country's semiconductor R&D spend. ASML remains by far the largest R&D investor in the Netherlands. The government also plays an important role through: (i) targeted R&D tax incentive schemes – such as the Innovation Box and the WBSO (*Wet Bevordering Speur- en Ontwikkelingswerk*) payroll tax credit – which encourage companies to invest in innovation; and (ii) public funding programmes, including the Beethoven programme and Brainport Development.

However, **growth is uneven**: while the R&D intensity of the bigger companies keeps growing, this is not the case for many mid-sized and smaller companies, who often struggle with increasing prices in the semiconductors value chain, increasing technological complexity and lack of available talent. In addition, smaller firms often face difficulties moving beyond the scale-up phase towards large-scale industrialisation and production, limiting their ability to expand further within the ecosystem. The geographic concentration of expertise, both in academia and industry, also risks creating **an ecosystem that is overly reliant on just a few major players**, potentially undermining long-term resilience.

To support SMEs and facilitate collaboration between industry, the public sector and knowledge institutions, the Netherlands recently (October 2025) **opened the ChipNL Competence Centre** at the Noviotech Campus in Nijmegen. The centre will focus on facilitating companies' access to EU pilot lines for testing and validating chip solutions, developing an innovative design platform, talent programmes to strengthen skills and guidance on financing and partnerships. This initiative builds directly on the ChipNL innovation programme, which was presented in January 2025 by a consortium of 64 Dutch semiconductor companies and organisations and was backed by a private investment of EUR 315 million with a request for government co-financing. While the Competence Centre has already been officially launched and funded, the broader ChipNL programme itself has not yet received formal government approval for co-financing. All of this is paired with the large-scale national plan to invest EUR 450 million up to 2030 on talent for the microchip sector, which is also part of the broader Beethoven Project.

At European level, the Netherlands continues to play a key role in the Semiconductor Coalition and in the preparation of a possible Important Project of Common European Interest on Advanced Semiconductor Technologies (IPCEI AST). On 29 September, all 27 EU Member States signed the Declaration of the Semiconductor Coalition – initiated by the Netherlands. The Declaration features five key priorities: a more collaborative semiconductor ecosystem, better alignment of EU and national funding, faster approval of strategic projects, skills development, energy-efficient and circular manufacturing and reinforced international partnerships that safeguard EU strategic autonomy. The Netherlands is also coordinating the EU's exploratory study on a possible IPCEI on Advanced Semiconductor Technologies, which is expected to focus on developing and strengthening critical semiconductor technologies within the EU. Member States, including the Netherlands, have opened calls for expressions of interest to identify candidate projects.

The Netherlands is firmly anchored in the global semiconductor value chain through its highly specialised niche, supported by a strong industrial and research base and sustained investment. The success of ASML demonstrates what strategic relevance can look like in practice: how long-term commitment to a complex, hard-to-imitate technology has positioned the country as an indispensable node in the global value chain. However, this strength is also highly concentrated. **In an increasingly fragmented geopolitical environment, relying on a single domain or flagship company alone can put long-term strategic resilience at risk.**

2025 recommendation on semiconductors: Find alternative sources of funding (both public and private) to capitalise on the Netherlands' competitive advantage in the areas of semiconductors and quantum technologies, while maintaining a good business environment for long-term digital innovation.
The Netherlands addressed the recommendation fully by putting significant policy actions in place in 2025 and the beginning of 2026. In March 2026, the government announced the start of the construction of a photonic chip pilot plant on Eindhoven's High Tech Campus. The project, which is part of the European initiative PIXEurope, is funded by multiple different public and private sources, including the EU's Chips Joint Undertaking, PhotonDelta, the Dutch Ministry of Economic Affairs and Climate, the Ministry of Defence and TNO. The goal is to scale up the production of indium phosphide (InP)-based photonic chips, which detect light signals instead of using electrical signals, making data transmission faster and more energy efficient. With a mix of public and private financing, Invest-NL is also actively investing in the semiconductor sector, primarily through its Deep Tech Fund. Its recent investments focus on supporting innovative scale-ups that are developing advanced, energy-efficient chip technologies, helping them accelerate commercialisation and bring their solutions to the market. A few examples include a EUR 4 million investment in SandGrain, a deep-tech company developing tiny chips enabling devices like robots

and self-driving cars to be identified in a secure manner, and a EUR 10 million in Qualinx, a scale-up developing Global Navigation Satellite System (GNSS) chips, which are crucial for applications such as navigation, logistics, agriculture and smart infrastructure. To address the shortage of venture capital for young deep tech, Invest-NL also recently invested EUR 10 million in Forward.One Fund III – a fund that specialises in breakthrough technologies, including semiconductors, in the Benelux countries, DACH region and the Nordics. The Seed Capital scheme, run by the Netherlands Enterprise Agency on behalf of the Dutch Ministry of Economic Affairs and Climate, also opened a new call for tender with a total budget of EUR 42 million to strengthen early-stage venture funds that, in turn, invest in deep tech and high tech.

Meanwhile, a 'Semiconductor Vision 2035' was published in April 2026, highlighting the Dutch government's ambition to strengthen the national semiconductor ecosystem through long-term public-private cooperation, targeted investment in innovation and coordinated support for infrastructure, education and industrial development.

Edge nodes

Performance assessment

According to the Edge Node Observatory, the Netherlands is estimated to have deployed a total of 368 edge nodes by 2025. The Netherlands is among the top performing countries in the EU, with the total number of edge nodes across all Member States estimated at 7 451. Following a change in methodology, this number cannot be compared with previous estimates.

Policy context and assessment of recommendations

As demand for real-time data processing and lower latency services is growing in the Netherlands, edge computing has great potential to expand in the coming years. The country's robust connectivity infrastructure, especially its high broadband penetration and ongoing 5G rollout, provide a good foundation for deploying computing capacity that is closer to users and devices. At the same time, the government's priorities around smart infrastructure development and digital innovation – including the Brainport Eindhoven innovation hub – are creating favourable conditions for deploying edge nodes. At EU level, initiatives like the Important Project of Common European Interest on Next-Generation Cloud Infrastructure and Services (IPCEI-CIS) have pushed the development of secure, low-latency digital infrastructure, including edge computing.

Taking advantage of this potential, telecom providers and local administrations are increasingly making use of edge nodes for their services. KPN, for instance, has been testing the benefits of combining 5G networks with local edge gateways, enabling real-time local processing of data with reduced latency and higher reliability. Several Dutch cities are also adopting edge computing to support their smart digital transition. The Smart Bikes project in Amsterdam, for example, attaches small edge devices to bikes to spot damages such as broken street lights or signs in the city in real time. After processing the data locally through edge nodes, the information is then sent to a central city system, enabling faster response and reduced network load. Other cities and regions, including Rotterdam with its industrial port, Eindhoven, with its innovation hub, and Utrecht, are also leveraging edge nodes for transport, logistics and public infrastructure applications.

The use of edge nodes to process data locally is closely linked to the need for cloud storage. **While the Netherlands is actively involved in strategic conversations and planning around a European**

autonomous cloud and cloud sovereignty, concrete large-scale operational deployments are still in their early stages. On top of the Netherlands' ongoing participation in the IPCEI-CIS, the Dutch Council of Ministers adopted a non-paper on 'Strengthening cloud sovereignty of public administrations' in July 2025. The document calls for coordinated action at EU level, including efforts to define cloud sovereignty, establish risk frameworks, secure funding and reform procurement practices. The Netherlands Digitalisation Strategy (NDS) is aligned with these objectives and lists sovereign cloud technology among its six main priorities. On the ground, a notable Dutch example of a sovereign public cloud is mijn.host. It was established in 2016 as a web hosting provider and, in April 2025, it launched a sovereign public cloud platform built on open-source technology and hosted entirely in Dutch data centres.

Quantum technologies

The Netherlands is further solidifying its position in quantum technology, showing exceptional strength relative to its size in terms of research, start-ups and investment. A recent report by Quantum Delta NL shows that the country's quantum ecosystem is expanding rapidly: new quantum hubs are being established for research and training, the number of quantum start-ups has more than doubled in the past five years (reaching 29 start-ups in 2025), annual patent applications have risen from 11 in 2020 to 60 in 2025 and private capital has increased from EUR 10 million in 2019 to EUR 160 million in 2025.

Although the Netherlands excels in quantum research and its start-up ecosystem is growing, translating this progress into real economic value remains a challenge – a dilemma that former ASML CEO Peter Wennink calls the Dutch 'innovation paradox' in his report. Many good research ideas often fail to translate into scalable applications, partly as a result of fragmented support structures (i.e. scattered funding schemes, very little guidance on the path from lab to market) and rigid rules around intellectual property (particularly in universities).

2025 recommendation on quantum technologies: Find alternative sources of funding (both public and private) to capitalise on the Netherlands' competitive advantage in the areas of semiconductors and quantum technologies, while maintaining a good business environment for long-term digital innovation.

In 2025, the Netherlands continued to implement existing measures but did not take any new measure. The Quantum Delta NL programme, supported by the National Growth Fund, entered its third and final phase. October 2025 saw the launch of a new challenge-based funding call, the 'Quantum Forward Challenge', to help translate quantum research into real-life uses cases in the life sciences and healthcare sectors. Additionally, the Dutch Research Council (NWO) and Quantum Delta NL have allocated EUR 10.5 million to support scientific quantum research. As regards private funding, the start-up QuiX Quantum secured EUR 15 million from Invest-NL and the European Innovation Council to develop a first-generation photonic quantum computer. The final phase of the Quantum Delta NL programme is scheduled to run through to 2028.

To capitalise on its competitive advantage, the Netherlands is also building a strong talent pool. The AL-3 project, for example, has put in place four Talent and Learning Centres to connect primary and secondary students with industry and five Quantum Laboratories to spark their interest in quantum subjects. The project also runs exchange programmes for students and researchers and is working closely with EU partners, including France and Germany, to align training efforts.

While these efforts are promising, no clear plans exist to increase quantum funding beyond 2028, creating uncertainty for both public and private stakeholders. The Ministry of Economic Affairs and

Climate is currently working on a government-wide Quantum Strategy, expected for the second half of 2026, which will be critical in aligning scientific excellence with industrial ambition, showcasing use cases and instilling confidence in the sector.

Supporting EU-wide digital ecosystems and scaling up innovative enterprises

SMEs with at least basic digital intensity

Performance assessment

In 2025, 88.76% of Dutch SMEs had at least a basic level of digital intensity, compared with the EU average of 71.39%. While the Netherlands continues to lead in terms of the overall percentage, its annual growth rate (+3.6%) is lower than the EU average of 11%. The country is on track according to the national trajectory set out in its national Digital Decade roadmap.

In terms of SMEs with a very high digital intensity index, the Netherlands stands at 20.24%, which is more than double the EU average of 9.07%. However, once again, its annual increase (+39.4%) is lower than that observed on average in the EU (+43.9%).

Policy context and assessment of recommendations

The data demonstrates that, relative to other EU countries, Dutch SMEs have a good level of digitalisation. However, the transition from basic to strategic digital engagement is still in progress. According to a recent Eurofound report, some of the main bottlenecks constraining SMEs' capacity to really take advantage of digitalisation include:

- lack of time and resources to really invest in strategic digital planning and implementation that goes beyond a day-to-day use of digital tools;
- financial limitations that restrict bigger investments in advanced tools;
- skills and knowledge gaps, which includes both difficulty in accessing the right knowledge and training and a lack of available ICT specialists in the labour market (*see the ICT specialists' section for more details*).

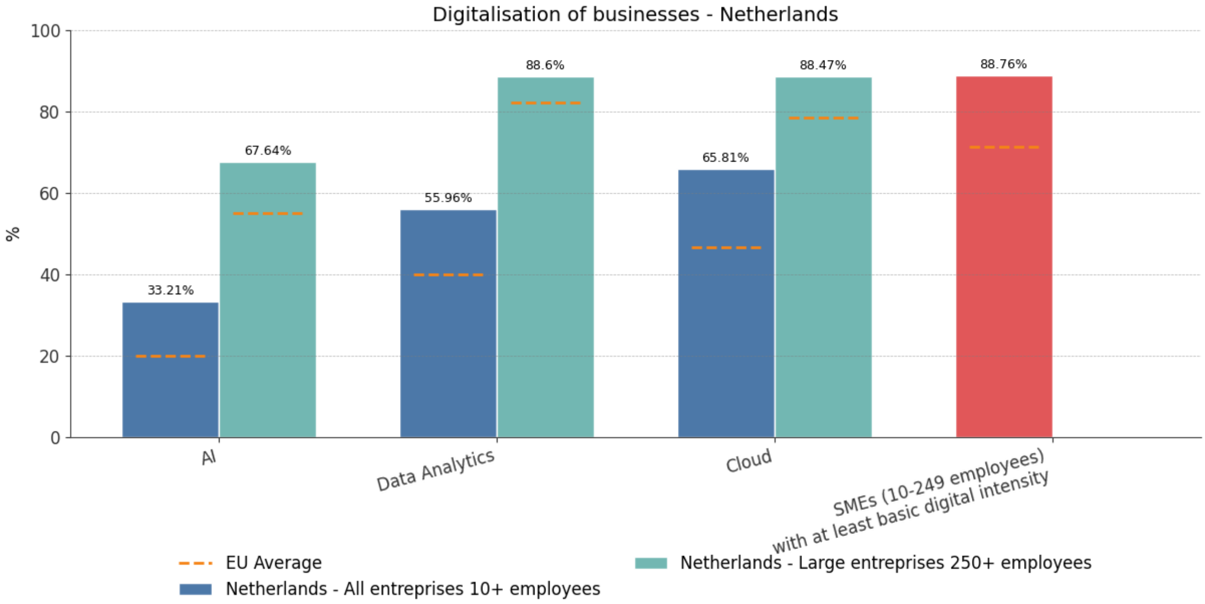
Against this backdrop, a range of initiatives are shifting their focus from raising awareness about digital adoption to supporting SMEs in developing the skills and capacity to implement digital technologies. The Smart Makers Academy, formalised in 2026, is being rolled out nationally through six regional academies that provide demand-driven support tailored to the real business needs of manufacturing SMEs. In parallel, sectoral training and development funds – such as A&O Metalektro and OOM – continue to play a role in upskilling the workforce and lifelong learning, with an increasing focus on digital and AI-related skills. Together, these initiatives reflect a growing recognition of the skills challenge, with an approach that combines skills development with practical support for implementation at business level.

However, building digital capabilities among SMEs remains a medium- to long-term structural challenge, influenced by factors such as labour market dynamics, education systems and funding

support. Emerging initiatives such as the Networked Local Digital Twins towards the Citiverse (LDT CitiVERSE) EDIC are adding a new dimension to digitalisation, by providing a framework for deploying digital solutions (including small language models) at city and regional scale. These initiatives give SMEs and public actors access to advanced digital twins, AI-powered tools and shared infrastructures, while focusing on business models, operational value and demand-driven implementation. By virtualising processes and decision-making, they also help address resource constraints and make complex decisions more efficient, demonstrating a practical and scalable approach to digitalisation. Coordination between these emerging initiatives and broader support structures such as the EDIHs is still evolving and not yet fully systematised.

Take up of advanced technologies

Performance assessment



The Netherlands continues to maintain a leading position when it comes to enterprises' adoption of key digital technologies. In 2025:

- **33.21%[2] of Dutch enterprises adopted AI, which is above the EU average of 19.95%** - the Netherlands is on track according to the trajectory set out in its national Digital Decade roadmap;
- **55.96% of Dutch enterprises adopted data analytics, which is above the EU average of 39.85% -** the Netherlands is on track according to the trajectory set out in its national Digital Decade roadmap;
- **65.81% of Dutch enterprises adopted cloud technologies, which is above the EU average of 46.49%** - the Netherlands is lagging behind the trajectory set out in its national Digital Decade roadmap;
- **and 79.67% of Dutch enterprises adopted AI or cloud or data analytics, which is above the EU average of 63.20%** - the Netherlands did not provide a national trajectory point for 2025 for the three KPIs together in its national Digital Decade roadmap.

The annual growth rate for the adoption of all three technologies in the Netherlands was lower than the average recorded across the EU. AI adoption grew by 44%, which was lower than the EU average

[2] This includes a break in time series.

of 48%; data analytics adoption grew by 5%, which was lower than the EU average of 9.5%; and cloud adoption grew by 4.4%, which was lower than the EU average of 9.5%.

Moreover, the gap in digital maturity between SMEs (10-249 employees) and large companies (250+ employees) continues to persist, reflecting different levels of digital maturity. This is a trend that can be observed across the EU but appears to be slightly less pronounced in the Netherlands. In 2025, 67.64% of large companies adopted AI (EU average: 55.03%), but this was the case for less than half (31.87%) of SMEs (EU average: 18.90%). Similarly, a notable 88.60% of large companies adopted data analytics (EU average: 82.03%), compared with 54.70% of SMEs (EU average: 38.59%), while 88.47% of large companies adopted cloud (EU average: 78.32%), compared with 64.93% of SMEs (EU average: 45.74%).

Policy context and assessment of recommendations

While Dutch SMEs are increasingly experimenting with advanced digital technologies, their effective use and integration into core operations remains limited, highlighting the need for more support in practical implementation and adoptions strategies. A 2025 government report on the use of AI by SMEs confirms that awareness of and experimentation with the technology have increased, but most companies still use AI on an exploratory basis rather than embedding it structurally into their business processes. Similarly, the 2025 PwC EMEA Cloud Business Survey shows that, although Dutch companies have a relatively high cloud maturity, companies with less advanced cloud capabilities are struggling to migrate legacy systems, manage security issues and translate their investments into real business value. **Nonetheless, an increasing number of organisations recognise the need to strategically invest in AI, cloud and data, not only to drive innovation but also to strengthen digital sovereignty.** A report shows that Dutch companies are increasingly trying to adopt sovereign and multi-cloud solutions to keep data secure and avoid reliance on a single provider.

Several initiatives reflect a broader effort to support both the diffusion of advanced digital technologies and the development of the skills and governance frameworks required for their wider adoption. The public sector is increasingly making use of AI to improve its services and speed up administrative procedures. Additionally, measures funded under the Recovery and Resilience Facility (RRF) are contributing to the development of applied AI solutions, talent and industry partnerships. Such measures include the National Education Lab AI (NOLAI) and AI Learning Communities linking vocational and higher professional education institutions with companies.

2025 recommendation on Artificial Intelligence: Strategically allocate a combination of public and private resources to support SMEs' take-up of key technologies, in particular AI. Improve collaboration between scattered regional initiatives and set out a clear vision and strategic plan for AI to fully harness its potential.
In 2025, the Netherlands continued to implement existing measures and introduced some new measures to respond to the recommendation. The network of European Digital Innovation Hubs (EDIHs) – comprising five hubs across the country – has secured new funding for the 2026-2028 period to move beyond awareness-raising and help SMEs with the practical implementation of digital solutions. The hubs will provide SMEs with access to expertise, testing facilities and high-performance computing and guidance on AI adoption and cybersecurity practices. The Smart Makers Academy will also continue beyond 2025. Complementing the EDIHs, the AI scale-up factory in Groningen, which will be part of the European AI Factory network, is expected to give businesses and research organisations access to high-

performance computing, experimentation support and a broader innovation network, enabling practical and scalable adoption of AI (and other advanced technologies).

Although there is no formal Dutch AI strategy, the new coalition agreement marks a willingness to transition from pilot projects to scaling up key technologies such as AI. The new government intends to support the expansion of AI infrastructure and introduce a more 'institutionalised' framework to facilitate adoption. This includes bridging the gap between research and large-scale application through the creation of the National Agency for Disruptive Innovation, the introduction of regulatory sandboxes and public procurement instruments to help implement AI at scale.

Unicorns, scale-ups and start-ups

Performance assessment

At the beginning of 2026, the Netherlands had 37 unicorns, having gained only 1 additional unicorn since 2025 (2025 revised figure: 36). The Netherlands did not provide a national trajectory point for 2025 in the Digital Decade national roadmap.

Policy context and assessment of recommendations

The Dutch tech ecosystem has a strong foundation but is starting to show some structural challenges. According to TechLeap's annual State of Dutch Tech Report 2026, the Netherlands counted more than 11 000 active tech companies in 2025, including 9 659 start-ups. Of those, 1 319 had raised more than EUR 100 000 (up from 1 097 in 2023) and 286 qualified as scale-ups (up from 223 in 2023). Additionally, total venture capital invested grew by roughly 11% year over year to a total of EUR 2.6 billion, showing that capital remains available and that the ecosystem continues to mature.

However, the pace of new start-up creation has slowed, the number of investment rounds has declined, and the scale-up conversion rate remains below the EU average. The pace of new start-up formation peaked in 2023, with 188 new start-ups. 2025 saw only 117 new start-ups that surpassed the EUR 100 000 threshold. Meanwhile, the number of venture capital investment rounds declined by around 15% year over year. If taken together with the 11% rise in total venture capital investment, this seems to suggest that there has been a shift towards larger, later-stage investments. Additionally, the Dutch scale-up conversion rate stands at 21.5%, below the EU average of 24.2% and far behind the 52.2% achieved in the US. This suggests that, although innovation capacity remains strong, the Dutch ecosystem struggles to help companies become internationally competitive scale-ups. Also important to note is **the Dutch tech ecosystem's reliance on external funding,** with about 80% of venture capital invested in Dutch AI companies in 2025 coming from foreign investors.

The Netherlands is taking some steps to address these structural challenges, in particular to mobilise growth capital. One of the most notable examples is the commitment to allocate EUR 250 million to a proposed blended finance instrument under Invest-NL, with the goal of mobilising private capital for scale-ups and projects with large capital-intensive financing needs. The government's 3% R&D Action Plan, introduced in 2025, also makes concrete proposals to reinforce the entire innovation pipeline – from early-stage to late-stage – by supporting more research that leads to new business ideas, reducing the risks for seed investors and encouraging private investors to put in more capital. In the coalition agreement, the newly formed government also signalled its intention to create a National Investment Authority (expected in 2028), to act as an enhanced national promotional bank that can consolidate existing tools like Invest-NL and provide risk-bearing capital to help Dutch companies scale up. In parallel, the idea is to keep innovation incentives like the Innovation Box alive and to expand the WBSO tax incentive for companies investing in AI and technology development. At EU level, the European Tech Champions Initiative (ETCI) is continuing its efforts to mobilise institutional investors, using a fund-of-funds structure to target late-stage growth financing.

Strengthening Cybersecurity & Resilience

While the Netherlands remains one of the EU's most digitally advanced nations – with strong digital literacy among its population and strong enterprise preparedness – **its resilience is being tested by an increasingly complex, diverse and unpredictable cybersecurity landscape.** As digitalisation deepens, maintaining public trust in digital services will depend on pairing strong awareness with adequate resources, coordination between stakeholders and governance mechanisms that can adapt to the evolving threat landscape.

Dutch people and enterprises show good overall good cyber awareness and preparedness. In 2025, 76.71% of Dutch individuals demonstrated above-basic digital safety skills, outperforming the EU average of 51.34%. Similarly, in 2024, 76.34% of enterprises implemented at least five of the 11 cybersecurity measures tracked by Eurostat, well above the EU average of 56.85%. Dutch enterprises excel in several security measures, outperforming the EU average in:

- advanced authentication: 32.10% of Dutch enterprises used biometric authentication (versus an EU average of 18.27%);
- incident preparedness: 62.89% maintained log files (versus an EU average of 45.16%), and 52.53% conducted periodic risk assessments (versus an EU average of 34.10%);
- security testing: 53.39% performed ICT security tests (versus an EU average of 34.64%).

However, even robust awareness and preparedness cannot fully prevent disruption. In 2025, the Netherlands faced several important cyber incidents**.** These included multiple distributed denial-of-service (DDoS) attacks that temporarily disrupted essential services, such as the national digital identity platform DigiD (which was made unavailable four times between January and March 2025), payment services and municipal websites. In addition, a number of cyberattacks led to the suspension of education activities at Eindhoven University of Technology and the leakage of personal data stored on the Almere council website. Ransomware incidents also resulted in the exposure of sensitive health records.

Moreover, rising cyber threats are straining municipal resources. A 2025 study revealed that Dutch municipalities have seen security software and information security staff costs increase by approximately EUR 1.50 per inhabitant over the past five years. Beyond financial pressures, structural vulnerabilities persist, including unclear role allocation between mayors, municipalities, regions and national authorities during digital crises; lack of escalation procedures and fragmented sharing of information; over-reliance on external ICT suppliers; and uneven implementation of security standards across municipalities.

Having identified fragmentation as a key challenge, the government continues to advance the Dutch Cybersecurity Strategy (2022-2028), focusing on national cyber coordination, legislative consolidation and support for businesses, municipalities and the public. The Strategy originally envisaged the creation of a single national cybersecurity authority through the merger of three structures. This has now been completed. Nonetheless, maintaining effective cooperation structures remains essential, as multiple ministries and authorities are still involved in processes such as the ongoing NIS2 transposition and the subsequent supervision of cybersecurity measures. Key developments include:

- the Cyclotron agreement (September 2025), signed by the National Cyber Security Centre (NCSC), ministries, the national police and private partners to improve information sharing about cyber threats and incidents;
- the merger of the Digital Trust Centre and the NCSC (January 2026), creating a single point of contact for organisations seeking help on digital security;
- the introduction of the CBW NIS2 Control Framework, helping organisations comply with the NIS2 Directive;
- a public internet consultation (November 2025) on detailed rules under the Cybersecurity Act.

A few additional initiatives supporting the cyber preparedness of SMEs, municipalities and the general public are also worth mentioning. A notable milestone includes the announcement by the Centre for Crime Prevention and Security (CCV) of a Digital Basic Safety SME quality mark, expected to be ready by spring 2026. The quality mark will help entrepreneurs assess whether external ICT service providers meet required digital security standards (as established in the Digital Security Risk Class Classification). Dutch companies in certain regions of the country can also contact the SME Cyber Alarm Centre (a public-private initiative) for immediate assistance in the event of a cyber-attack. The CCV is also actively promoting a new online training course to make older people more aware of and resilient to digital crime, and has launched a HackShield progamme to connect children, schools and cybersecurity professionals through workshops, gamified learning and mentorship. Further efforts are expected through the Dutch European Digital Innovation Hub (EDIH) network, for which renewed EU funding has recently been confirmed and national funding secured for 2026-2028. A key focus of the EDIHs will be cybersecurity and AI (see the AI section for more details).

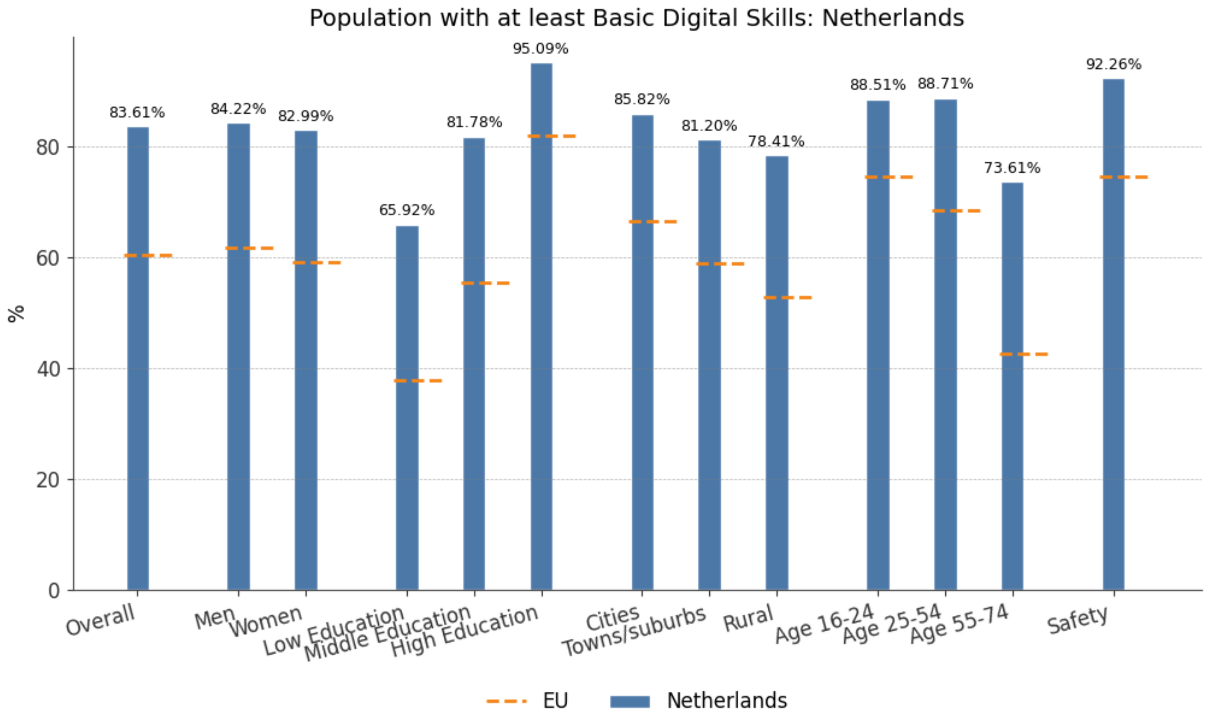
Protecting and empowering EU people and society

Empowering people and bringing the digital transformation closer to their needs

Equipping people with digital skills

Basic digital skills

Performance assessment

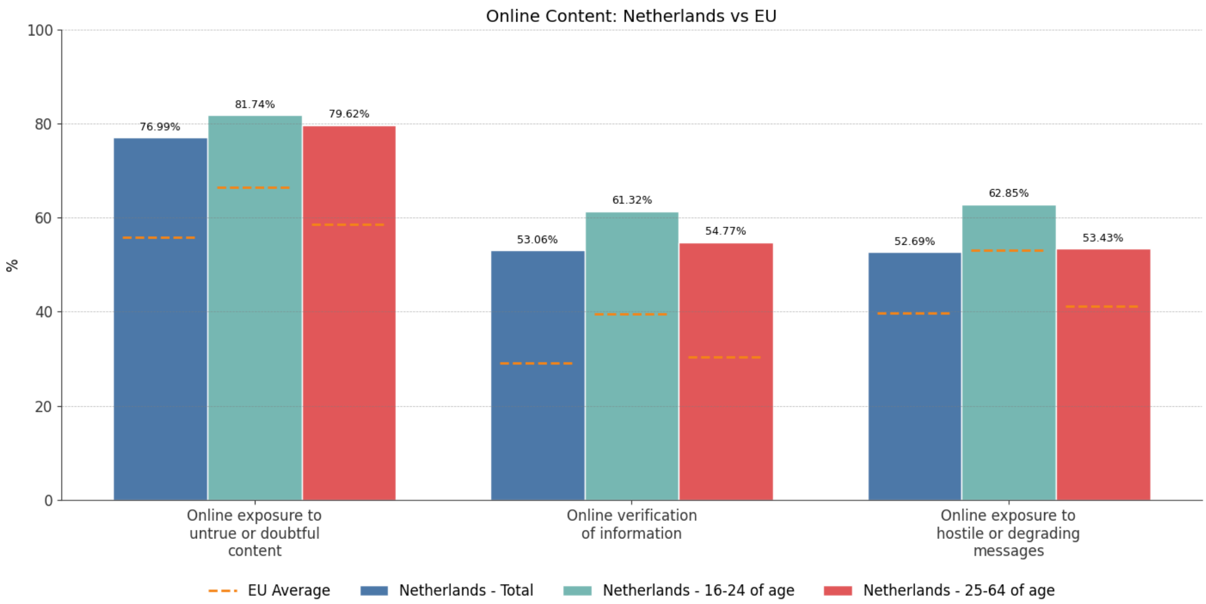


The Dutch digital skills profile remains generally strong, characterised by a high overall proficiency, minimal gender and urban-rural disparities and strong digital safety awareness. However, some challenges remain in reaching low-educated individuals, older adults and young people who are commonly exposed to online risks.

- **At least basic digital skills: In 2025, 83.61% of individuals aged 16-74 had at least basic digital skills, which is above the EU average of 60.40%.** However, the annual growth rate of 0.5% since 2023 potentially suggests that saturation point has been reached among easier-to-reach groups, while harder-to-reach groups (i.e. low-educated, older adults) lag behind. This contrasts with the EU's faster growth of 4.3%. The Netherlands is on track according to the trajectory set out in its national Digital Decade roadmap.
- **Digital safety skills:** A striking 92.26% of individuals in the Netherlands have basic digital safety skills, which is significantly higher than the EU average of 74.63%.
- **Gender gap:** Of the people with at least basic digital skills, 84.22% are men and 82.99% are women. This gap is smaller than the EU average of 2.75 percentage points in favour of men.

- **Education level:** Individuals with low formal education have a digital skills rate of 65.92%. This is 17.69 percentage points below the national average – a gap that is smaller than the EU average of 22.84 percentage points – but still higher than the EU average of 37.56% for the same group. This suggests education-level disparities are less severe in the Netherlands but persist as a key barrier.
- **Age groups:** While 88.71% of adults aged 25-54 have basic digital skills (EU average: 68.57%), this drops to 73.61% for adults aged 55-74 (EU average: 42.6%). The smaller generational gap (compared with the EU as a while) highlights relatively uniform skills across generations, though older adults remain a priority group.
- **Living areas:** Urban areas (85.82%) outperform rural areas (78.41%), but the 7.41 pp gap is smaller than the EU average gap (13.67 pp).

- **Use of Generative AI:** 44.70% of Dutch people used generative AI in 2025 (EU average: 32.66%), with 26.56% using it for professional reasons. However, according to a survey by the Centre for Digital Inclusion of the University of Twente, there are clear differences in the use of the technology by age and education. While very common among the young and highly educated segment of the population, AI tools are hardly used by the over 71s and are less likely to be used by the less educated and those with less economic and social capital. The research suggests that this is linked not only to a lack of skills but also to a feeling of distrust towards AI, a strong preference for autonomy and concerns about privacy. This is in line with the results of the Digital Decade Eurobarometer, where 57% of Dutch respondents cite concerns about accuracy or incorrect information and 53% about privacy or data protection. Moreover, a striking 97% of Dutch respondents think that it is important for the EU to prioritise protecting privacy and security online in the next 10 years.



- **Fact-checking:** The Netherlands leads in fact-checking behaviours, with 53.06% of individuals verifying the truthfulness of online content in 2025 (EU average: 29.16%). Younger Dutch users (16-24) are the most proactive verifiers (61.32% versus 39.49% in the EU as a whole).
- **Exposure to misinformation:** Young people (aged 16-24) are particularly exposed to misinformation and hostile content. In 2025, 76.99% of Dutch internet users encountered untrue or doubtful content online, significantly higher than the EU average of 55.90%. While exposure appears to be more widespread, its annual growth rate (4.3%) is lower than the EU average (6.5%). Younger adults aged 16-24 were the most exposed (81.74% versus 66.34% in

the EU as a whole), followed closely by those aged 25-64 (79.62% versus 58.57% in the EU as a whole).
- **Hostile content online:** Over half of Dutch internet users (52.69%) reported encountering hostile or degrading messages online in 2025, which is higher than the EU average (39.72%) but with a slower growth rate (4.3% vs 8.9% in the EU as a whole). As with misinformation, younger users (16-24) were most affected (62.85%), though the age gap (9.42 pp) is again smaller than the EU average (11.85 pp). This pattern reinforces the observation that Dutch internet users, regardless of age, face higher exposure to online risks than their EU peers.

Policy context and assessment of the recommendations

The Netherlands has historically performed above the EU average on basic digital skills. This comes from a robust digital infrastructure and a highly digitalised society that operates most of its services online. However, data shows that not all Dutch citizens are benefitting fully from this highly digitalised society. In 2025, 31.73% of Dutch people encountered issues when using the internet. A trend report by the Digital Society Alliance (*Alliantie Digitaal Samenleven*) identifies the many different drivers of digital inequality, including insufficient access to devices like laptops, limited basic skills, low income, low literacy and physical barriers such as visual impairments. These factors often reinforce each other, creating a ‘digital vicious cycle’ in which socio-economic vulnerability increases the risk of digital exclusion, which in turn further limits participation in society. Although lack of internet access is also a possible reason, the country’s almost full coverage and high internet use (99.43% of individuals used the internet at least once a week and 99.28% of households had internet access in 2025) tend to suggest that digital inequality is more commonly associated with socio-economic differences, skills gaps and accessibility, rather than with infrastructure gaps alone.

There are many ongoing initiatives to support digital skills, preparedness and inclusion in the Netherlands. A vast majority (92%) of Dutch respondents to the Digital Decade Eurobarometer think that it is important that the EU prioritises making digital tools more accessible for everyone (especially vulnerable groups, people with disabilities and the older population) in the next 10 years. The Digital Government information points (IDO), often located in local libraries, are the most common examples, and it was recently confirmed that their budget had been renewed. Additional online resources are also available, such as *Digisnapje* and *Steffie*, providing short and easy lessons on how to use digital services. As regards digital safety skills, the government is working on a comprehensive Strategy for Children’s Rights Online (launched in October 2025), which focuses, among other things, on strengthening regulation to protect children and address harmful online techniques, introducing restrictions on the use of mobile phones in schools and raising awareness of digital opportunities and risks through public communication campaigns. To support the more vulnerable population, the Municipality of Rotterdam launched a social internet pilot on 1 February 2026. The scheme offers 250 low-income households discounted internet access and a basic digital skills course. The University of Rotterdam is evaluating the pilot’s impact and exploring the possibility of scaling it up, while additional practical guidance was provided to municipalities by the University of Twente to design and evaluate digital inclusion initiatives. Furthermore, the Dutch government is donating tens of thousands of used laptops to low-income households in the coming years, giving them the opportunity to participate in the digital society.

The Netherlands is also actively trying to make the digital environment safer and more resilient, particularly for children and democratic processes. According to the Digital Decade Eurobarometer, 95% of Dutch respondents think that strengthening the protection of children and young people online should be a priority and 94% agree that online manipulation (i.e. disinformation, foreign interference, AI-generated content and deepfakes) pose a threat to democratic processes. In line with this thinking, the government has drawn up guidelines on healthy screen and social media use, is working with industry to provide parents with reliable information when purchasing devices and is advocating for stricter rules against addictive algorithms and harmful design on social media platforms at EU level. The Netherlands has also developed several initiatives to ensure that children can safely and securely benefit from the opportunities of the online world. These initiatives form part of the Strategy of Children's Rights Online and include Children's Rights Impact Assessments (CRIAs), youth panels and public awareness campaigns.

To strengthen resilience against disinformation and foreign information manipulation, the Netherlands is increasing its commitment to and investment in fact-checking, media literacy, research and detection capacities. Key initiatives include additional funding for the BENEDMO fact-checking consortium, supporting media literacy through the Dutch media Literacy Network (*Netwerk Mediawijsheid*) and the website 'Fake News' (*isdatechtzo.nl*), and running projects such as 'Closer to News' (*DichterBijNieuws*) to improve news literacy among the population. The government is also funding multidisciplinary research – such as a 2024-2026 study by Wageningen University and the University of Amsterdam on the impact of disinformation on Dutch democracy – and collaborating with international partners like the OECD and EU networks to improve detection and information sharing. In 2025, around EUR 500 000 was invested in related projects, which have produced fact-checks, public awareness initiatives, research publications and funding for several projects aimed at improving the online information environment.

2025 recommendation on basic digital skills: Complement the ongoing efforts at local and regional level to ensure digital inclusion and good levels of digital skills by setting up national curriculum plans and funding. This could include integrating technology literacy or similar courses in the national curriculum.

The Netherlands fully addressed the recommendation by putting significant policy actions in place in 2025. The Dutch Ministry of Education, Culture and Science commissioned the Curriculum Development Foundation (SLO) to update the national curriculum, which had remained largely unchanged since 2006. This resulted in the development of new core objectives for primary and secondary schools, including the introduction of digital literacy as a distinct area of learning. The explanatory memorandum on digital literacy broadly defines it as 'the knowledge and skill to deal with digital media and information and a toolbox to operate safely and be self-reliant in the digitalised society'. In the memorandum, digital literacy is also defined in terms of socialisation (i.e. interacting with others in digital environments and communicating and acting in a respectful manner) and personal formation (i.e. learning to reflect on one's online identity and that of others). Digital literacy is expected to be enshrined in law by 1 August 2027. Starting from 2026, schools will receive targeted support and training, through initiatives like the *Techkwadraat* learning cycle, which will help teachers translate the policy goals into practice.

The inclusion of digital literacy in primary and secondary education represents a step towards addressing these challenges. At the same time, the extent to which this objective will be implemented consistently across different types of schools and its ability to remain responsive to evolving digital skills needs will be important aspects to monitor. This is set against a backdrop of a general deterioration in the quality of education, coupled with recent budget cuts in higher education (*see 2025 Digital Decade country report*) and persistent teacher shortages. Initiatives such as Co-Teach Informatica, which aim to keep ICT education accessible in schools where there is no dedicated computer science teacher, offer temporary relief but are less suitable as long-term solutions.

In parallel to the update of the national curriculum, **the Masterplan for Basic Skills (launched in 2022) remains the country's long-term strategy to improve the quality of education in primary and secondary schools**, focusing on reading, writing and mathematics, as well as knowledge and skills in citizenship and digital literacy. This has also been prompted by the recent deterioration of general basic skills (mathematics, reading and science). According to the latest progress letter (4 December 2025), the Masterplan has now reached approximately 7 800 schools and over 2.3 million students (i.e. 95% of all students in basic education). Starting from 2027, all schools in the basic education system will receive structural funding for basic skills.

ICT specialists

Performance assessment

The Netherlands' total percentage of ICT specialists as a share of total employment was 7.20% in 2025. It is higher than the EU average of 5.0% and has grown at a rate of 2.9% from 2024 levels (7.0%). However, the country is lagging behind the national trajectory set out in its national Digital Decade roadmap.

The share of Dutch ICT specialists who are women grew slightly but ICT training reveals a concerning trend. The Netherlands had a slightly higher share (19.60% in 2025; 18.70% in 2024) of women ICT specialists than the EU average (19.50%). However, in 2023, only 4.60% of all graduates in the Netherlands were ICT graduates. This is near the EU average (4.70%) but leaning towards the lower-performing countries. This trend is concerning as a low share of ICT graduates worsens the prospects of bridging the gap in the training of more ICT specialists for the future workforce.

Policy context and assessment of the recommendations

A strong and highly skilled digital workforce underpins productivity growth, innovation capacity and the country's ability to maintain technological relevance in strategic domains such as semiconductors and quantum technology. The Dutch ICT labour market is characterised by a supply-demand imbalance, which is particularly felt by smaller firms and peripheral regions. In 2024, 15.3% of Dutch enterprises recruited or tried to recruit ICT specialists, compared with an EU average of 9.55%, while 9.65% of enterprises reported hard-to-fill vacancies for ICT specialist roles, compared with an EU average of 5.49%. Eurostat data also reveals that larger Dutch companies tend to dominate access to ICT talent more than their EU peers: in 2024, 84.34% of large companies (250+ employees) employed ICT specialists (EU average: 78.44%), versus only 21.83% of smaller firms (10-49 employees). These differences in size are further reinforced by **regional and institutional concentration**. Engineering graduates, who largely come out of the three main technical universities (TU Delft, TU Eindhoven and the University of Twente), create talent pipelines mostly for high-tech sectors clustered in the Eindhoven region. These dynamics give larger companies and innovation hubs a clear competitive advantage, while smaller companies and less central regions continue to struggle to secure skilled personnel.

The pipeline of STEM talent presents additional challenges, with persistent gender disparities and deep-rooted misconceptions. In 2024, men aged 20-29 were around eight times more likely than women of the same age to be enrolled in STEM fields. According to the AGDB monitor[3], this imbalance is reflected across the education pipeline, with women significantly under-represented in vocational, professional and university-level STEM programmes. Beyond gender differences, overall participation in STEM is relatively low: of all Dutch students who started tertiary education in 2024, 21% enrolled in STEM-related degrees, compared with to an OECD average of 27%. Among those who chose Vocational Education and Training (VET), only 19% were enrolled in STEM in the Netherlands, below the EU average of 36%. This may be due to the fact that many students, parents and teachers often perceive technical fields as less prestigious than traditional academic disciplines or as excessively demanding, high-risk and inaccessible. For those who do enter STEM programmes, completion rates remain concerning: only 58% of Dutch students graduate within three years of the expected completion date, compared to 68% in the fields of health and welfare. In the long-term, this may add further pressure to the labour tightness described above.

Structural and demographic pressures – such as an ageing population, a high share of part-time workers and pressures in the education system – further intensify these challenges. The ratio of full-time equivalent workers to people aged 67 and older has declined steadily since 2010, meaning that the Dutch economy has a shrinking base of available workers relative to its retirees. Moreover, the Netherlands has an exceptionally high part-time employment rate (38.6% of the employed population in 2024, more than double the EU average of 17.1%). While part-time work is not an issue per se, it coincides with a slowdown in labour productivity growth and the movement of labour towards less productive sectors. Meanwhile, the recent budget cuts in higher education are already leading to programme reductions and restructuring, with a risk of having a reduced student intake (*see 2025 Digital Decade country report*). This could indirectly worsen ICT workforce shortages.

2025 recommendation on ICT specialists: Attract a more diverse pool of ICT talent by taking advantage of untapped potential workers (i.e. people with a migrant background and those working in part-time employment). Follow up on recent plans to reduce labour market shortages, paying particular attention to attracting more ICT talent, improving labour market matching and providing suitable funding for higher education. Respond to worries regarding recent budget cuts in higher education.

In 2025, the Netherlands continued implementing its measures to address the recommendations but did not take any new measures. The Action Plan on Green and Digital Jobs is set to run until 2033, but the AGDB monitoring platform shows that the challenges it aims to address (i.e. increasing STEM enrolment, improving retention and strengthening education-industry cooperation) remain significant.

The recent coalition agreement places strong emphasis on talent development and retention, as well as on supporting lifelong learning for those already in the workforce. It mentions that universities are already in the process of implementing agreements to raise the number of international students and signals plans to reinstate the expat scheme. The agreement also underlines the importance of ensuring that MBO, HBO and WO institutions get the right resources to train people for the labour market. This may include the restoration of the MBO Regional Investment Fund. Finally, it suggests work is being done to ensure there is a personal learning budget or learning entitlements for workers already in the market. These commitments reflect a recognition

[3] A public website, providing accessible information and statistics on education and the labour market. Launched in April 2025, it monitors the implementation of the 'Action Plan on Green and Digital Jobs'.

of the importance of strengthening the ICT talent pipeline to sustain future innovation and competitiveness. However, how these priorities will translate into concrete measures and investments remains to be seen.

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

Performance assessment

In 2025, the Netherlands scored 90.65 out of 100 on digital public services for citizens, above the EU average of 84.64 and representing a 2.4% increase compared to 2024. Citizen-related life events that score particularly well include studying (100), transport (100) and career (93.75). Conversely, moving (78.89), health (86.29) and starting a small claims procedure (87.50) show the most room for improvement.

On digital public services for businesses, the Netherlands scored 89.44 out of 100, slightly above the EU average of 88.59 and representing a 0.7% increase since 2024. The business-related life event scoring particularly well is regular business operations (90), whereas business start-up (88.89) shows the most room for improvement.

Cross-border services performed slightly lower for both citizens and businesses, with a score of 82.20 out of 100 (still above the EU's 75.28) and 78.89 out of 100 (slightly above the EU's 78.37).

On access to e-Health records, the Netherlands scored 69.35 out of 100 in 2025. Although it has shown some improvements since the 2024 score of 65.18 out of 100 (with a growth rate of 6.4%), it remains below the EU average of 86.51.

The country is on track according to its trajectories for both digital public services for citizens and businesses, as presented in the Digital Decade roadmap. However, the country did not provide a national trajectory point for e-Health records for 2025.

Policy context and assessment of the recommendations

The Netherlands has built a strong foundation in digital identity, public services and e-Health, underpinned by user trust and high adoption rates. The country has long relied on DigiD, a widely adopted digital identity solution that provides access to most public services. This solid infrastructure underpins high adoption levels. In 2025, 95.09% of individuals used their eID both to access public services and for private reasons – well above the EU averages of 46.44% and 52.26% respectively. Similarly, 96.46% of individuals used the internet to interact with public authorities, reflecting a general sense of acceptance of digital governance. This is coupled with a high level of transparency of the service delivery (which scores 84.23 out of 100, above the EU's 69.59). This EUROSTAT indicator measures the extent to which users are involved in the design of services and the degree to which portals provide online access to personal data, among other things. As shown in the Digital Decade Eurobarometer 2026, 81% of Dutch respondents consider that the digitalisation of daily public and private services is making their lives easier.

Building on this foundation, the Netherlands is now preparing for the implementation of the EU Digital Identity (EUDI) wallets, with large-scale pilots testing a national wallet application already conducted in the municipalities of Amsterdam and Nijmegen and demonstrating high usability and accessibility. A successful transition to a national wallet will depend on safeguarding privacy and ensuring that the wallet delivers clear practical benefits for citizens and businesses, while coexisting with existing authentication methods such as DigiD and *eHerkenning*. Moreover, the focus is now on developing and completing the legal and organisational framework supporting the deployment of the EUDI Wallet, as well as the effective establishment of the required certification and accreditation processes. Still, there are also some questions on governance structures, business models, interoperability and long-term funding. Additionally, several European specifications set out in forthcoming implementing acts, including those concerning wallet-to-wallet exchanges, proof of association and representation, are still pending adoption. Despite these challenges, the Netherlands is continuing to advance both legal and technical preparations and is working towards the timely development and deployment of the NL EUDI wallet. working on legal and technical developments and is working to develop and deploy the NL EUDI wallet.

The Netherlands is also progressing towards achieving universal citizen access to their electronic health records, showing some improvements in the e-Health score. This is likely due to individual healthcare providers offering a broader range of data types to their patients. However, there is still some work to be done to onboard additional categories of healthcare providers and to establish a comprehensive national overview of which hospitals share this information. The law already allows legal guardians (i.e. parents or appointed carers) to access someone's e-Health data, but the digital system doesn't yet provide that access in practice. Public optimism is strong, with 63% of Dutch respondents to the Digital Decade Eurobarometer 2026 thinking that digital health technologies will have the most positive impact in the next 10 years. Several innovative examples are emerging, such as the use of Virtual Reality-based tools – supported by the European Regional Development Fund – to deliver accessible and engaging mental health support. Moreover, in the Dutch Recovery and Resilience Plan, one of the measures supports the development of a national health data infrastructure through the Health Research Infrastructure programme, which aims to standardise and connect health data, improve access to research data and facilitate the secure reuse of health information for research, innovation and policymaking.

Despite widespread availability and use of online services, the underlying service delivery in the Netherlands remains fragmented, as online access has largely been built on organisation-specific systems rather than a fully integrated government service model. In practice, this means that citizens and businesses may experience a digitally accessible but institutionally siloed system, where different government agencies operating their own portals and data infrastructures. As a result, users often need to navigate multiple entry points, provide the same information more than once and move between disconnected workflows.

Several initiatives were launched to address these interoperability challenges. In 2025, the Netherlands formalised its first government-wide digitalisation strategy (the Netherlands Digitalisation Strategy). The strategy was jointly developed by all levels of government and establishes a shared vision for digital public services, collective digital infrastructure and interoperability across the public sector. The Netherlands is also actively involved in the development of the Innovative Massive Public Administration interConnected Transformation Services European Digital Infrastructure Consortium (IMPACTS-EDIC), which focuses on developing digital solutions for interconnected public administrations.

Interestingly, the public sector is also experimenting with new technologies – in particular AI and generative AI. Published in December 2025, the Government-wide Monitor on Generative AI illustrates the growing role of AI in public administration. Some examples include developing AI-based chatbots to support citizen interaction services or to accelerate administrative procedures. In healthcare, the Netherlands complemented its 2019 Strategic Action Plan for AI with a healthcare-specific strategy. To date, 15 Dutch organisations have joined the Network of AI-powered Advanced Medical Centres, which aims to speed up the introduction of innovative solutions for prevention, early detection and diagnosis in cancer and cardiovascular disease.

Leveraging digital transformation for a smart greening

In the Netherlands, the ICT sector's emissions align with the EU average. Nevertheless, further progress could be made to improve the recycling of electronic equipment. Recently published sectoral data on air emissions show that the Dutch ICT sector emitted 20.9 kg CO_2 equivalent per capita in 2022, slightly below the EU average of 21.3 kg CO_2 eq. As in many EU Member States, the majority of these emissions (86.30%) stem from ICT services activities. However, the sector accounted for just 0.26% of the total economy's air emissions, comparable to the EU average of 0.33%. While a good portion (79.05%) of ICT-related waste collected (corresponding to two categories of waste electrical and electronic equipment) is recycled or prepared for reuse, there is still room for improvement to catch up with the EU average of 80.23%.

2025 recommendation on green transition: Continue efforts to contribute to the green transition, also by translating the Sustainable Action Plan into an actionable programme and creating more synergies among measures and policies within and beyond the government.

In 2025, the Netherlands made some efforts to address the recommendations by continuing to implement existing measures and introducing some new policy actions. In November 2025, the Minister of Economic Affairs sent the Sustainable Digitalisation Action Programme 2026-2028 to the House of Representatives, reporting on the progress made since June 2024. Most of the actions listed in the plan have been finalised or are ongoing, with the notable launch of the Sustainable IT Impact Assessment tool (June 2025), offering organisations with a practical guide, best practices and a radar to support and monitor more sustainable decisions. This can range from the energy-efficiency of hardware to extending the lifespan of IT equipment and optimising data storage. A chatbot is also being developed. This is the result of public-private collaboration – under the name of 'National Coalition for Sustainable Digitalisation' – made up of government bodies, the business community, knowledge institutions and civil society organisations. As part of the action plan, several efforts were also made to monitor the environmental impact of the digital sector, such as the publishing of an inventory of data for sustainable digitalisation. Future actions will include the launch of a knowledge portal where information about sustainable digitalisation will be collected, notably on relevant international developments, EU regulation for SMEs and funding opportunities.

Beyond the Sustainable Action Plan, at local level provinces are increasingly using spatial planning to guide digital infrastructure decisions, such as the location of new data centres of the deployment of 5G towers, **considering environmental and infrastructure constraints** like electricity grid congestion and groundwater availability for cooling. These decisions are made within the framework of the Regional Spatial Development Plan (*Omgevingsvisie*) and the annexed regulation (*Omgevingsverordening*), which provide legally binding guidance on where and how such projects can be developed. The planning is further informed by the POVI process, ensuring that digital and energy infrastructure requirements are aligned with provincial spatial strategies. One example is North Holland's data centre policy for 2025-2027, which sets out a strategy to guide the region's datacentre development through sustainable energy use, grid planning, as well as spatial and economic considerations. In parallel, innovative solutions are being explored to address grid constraints, such as the GENIUS project, which developed a 'super battery' at Eindhoven University of Technology. Co-funded by the European Regional Development Fund, alongside national and private partners, the project demonstrates how smart energy storage systems can alleviate net congestion on industrial sites and campuses.

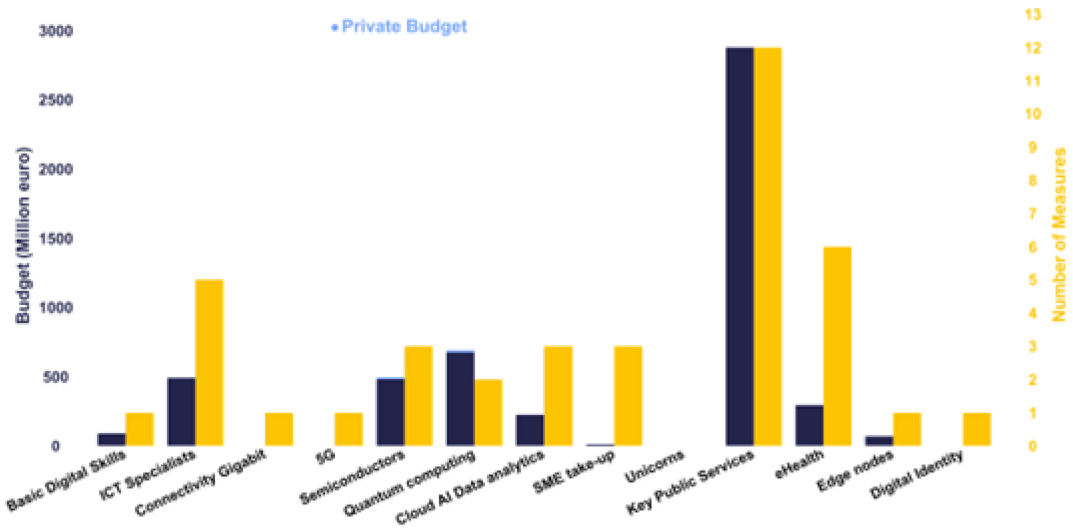
Annex I: National roadmap analysis

On 31 January 2025, the Netherlands submitted a fully revised national Digital Decade roadmap containing around 15 new measures and four revised targets. The budgets of several measures included in the original roadmap have been revised slightly upwards or downwards. Some edits were made because of clerical mistakes or to adjust new planned and allocated budgets. However, the national roadmaps (neither the 2023 original roadmap nor the 2024 adjustment) have not yet been published online.

With regards to targets, the Netherlands proposed a target and trajectory for at least basic digital skills (100%) and for the digitalisation of public services for both citizens and businesses (100 out of 100). The country did not provide a target and trajectory for unicorns and edge nodes, because it favours a more quality-oriented target. Nor did the country present a target and trajectory for access to electronic health records, as this would be difficult to establish given the Netherlands' decentralised healthcare system. The country raised its national targets for VHCN (to 99.9%), for SMEs with at least a basic level of digital intensity (to 95%) and for the take-up of data analytics by enterprises (to 75%). For ICT specialists as a proportion of people in employment, the Netherlands opted to keep the original national target for 2030 (9.2% of people in employment, which is still very close to the EU target of 10%).

With regards to measures, the Netherlands introduced five new measures in its national roadmap to support ICT specialists, highlighting its commitment to continue and closely monitor their implementation. The measures focus on boosting enrolment in STEM courses, providing regional support to help ICT specialists find jobs, as well as strengthening STEM and technology education in primary schools. Some measures also focus on continuing efforts to foster diversity within the technology sector and improving the digital skills of civil servants. One measure ('Smart Makers Academy') was associated with the ICT specialists target, although its main objective is to support SMEs in the manufacturing industry to adopt digital technologies.

Measures and budget in national roadmap[8]



Some measures included in the roadmap were linked to the relevant parts of the declaration on **digital rights and principles** and the Digital Decade general objectives, aligning in particular with the Commission's priorities on the green and digital transitions. The revised roadmap includes more details on the **consultation with stakeholders** than the original roadmap did.

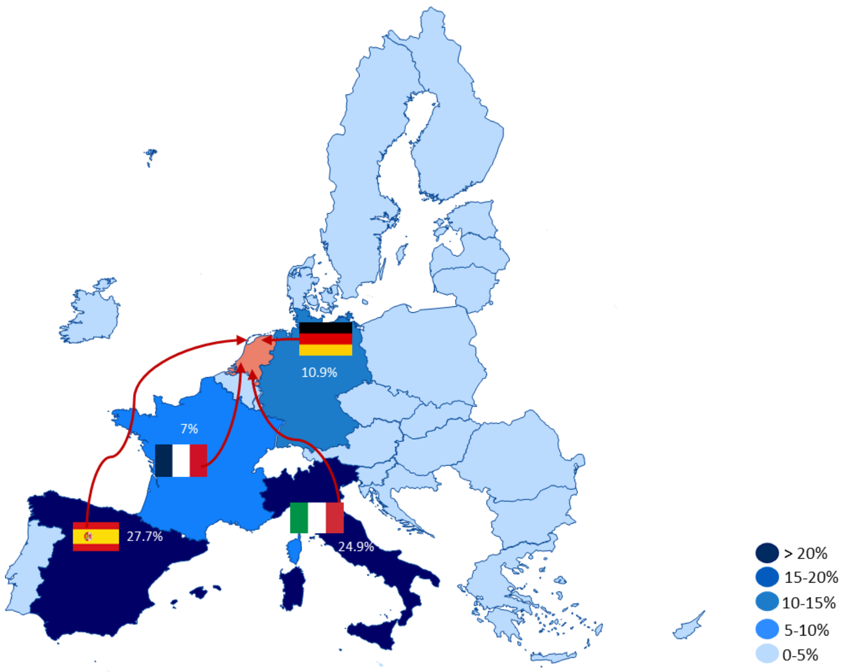
In total, the national roadmap includes **59 measures with a budget of EUR 5.25 billion, comprising EUR 5.22 billion from public budgets** (equivalent to 0.46% of the Netherlands' GDP). The highest number of measures and the highest share of the budget are targeted at digital public services.

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 of the Netherlands was evaluated to EUR 1.20 billion with EUR 264 million for digital infrastructures, EUR 285 million for digital skills, EUR 44 million for the digitalisation of businesses, EUR 241 million for the digitalisation of public services, and EUR 369 million for other digital priorities.

The total economic impact of RRF digital measures is estimated to EUR 6.12 billion for the national economy. Of this, EUR 2.03 billion stem from the direct effects of Netherlands's own RRP and EUR 4.09 billion correspond to spillover effects from the implementation of other EU Member States' plans. The Netherlands benefited the most from spillover effects from RRPs of Spain (EUR 1.13 billion), Italy (EUR 1.02 billion), Germany (EUR 447 million). The most impacted sectors are Manufacturing (EUR 1.29 billion), Trade (EUR 1.15 billion), and Professional Services (EUR 795 million).



RRF spillover effects to the Netherlands

The Netherlands

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

The Netherlands allocates 28% of its total recovery and resilience plan to digital (EUR 1.1 billion)[4]. In addition, under cohesion policy, EUR 0.2 billion – representing 10% of the country's total cohesion policy funding – is dedicated to advancing the Netherlands' digital transformation[5].

Multi-Country Projects

The Netherlands is a member of the 'Alliance for Language Technologies' EDIC, the 'Local Digital Twins towards the CitiVERSE' EDIC, the 'Innovative Massive Public Administration interConnected Transformation Services' (IMPACTS) EDIC and the 'Digital Commons' EDIC. The country is directly participating in the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT) and in the IPCEI on Next Generation Cloud Infrastructure and Services (IPCEI-CIS). It is also 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.