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ANNEX 21

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Communication from the Commission to the European Parliament, the Council and the European Economic and Social Committee and the Committee of the Regions
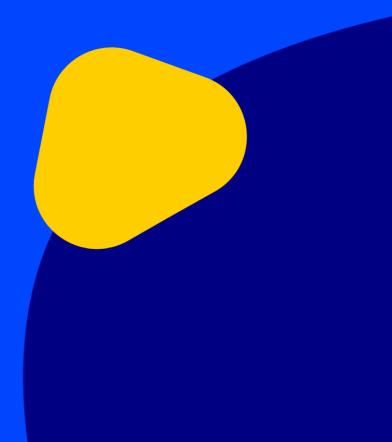
State of the Digital Decade 2025: Keep building the EU's sovereignty and digital future

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SHORT COUNTRY REPORTS 2025

The Netherlands

Executive summary

The Netherlands has long been a leader in digital innovation owing to support from a strong research base. However, it faces challenges from ICT labour shortages and declining public investments in innovation and digital education. The country is very committed to safeguarding users online and focuses on countering disinformation and protecting children.

The Netherlands shows a high level of ambition in its contribution to the Digital Decade, with 10 national targets, 90% of which are aligned with the EU 2030 targets. The country is following its trajectories well, with 83% of them being on track (based on the 2024 trajectories established for 6 KPIs out of 8 analysed). The Netherlands addressed 40% of the 10 recommendations issued by the Commission in 2024, either by implementing significant policy changes (20%) or making some changes (20%) through new measures.

The Dutch semiconductor industry remains a cornerstone of its digital landscape, with growing momentum in quantum technologies. However, the discontinuation of key funding sources like the National Growth Fund have created financial uncertainty. ICT talent shortages also persist, worsened by recent budget cuts in higher education. In 2024, the Netherlands expanded its 2022 strategy against online disinformation and improved legislation to protect children online. The upcoming Netherlands Digitalisation Strategy will take a more centralised approach, focusing on enhanced digital government services at local, regional and national level, Artificial Intelligence (AI) adoption, civil servant digital skills and digital sovereignty and security.

Digital Decade KPI [1]	The Netherlands				EU		Digital Decade target by 2030	
	DESI 2024 (year 2023)	DESI 2025 (year 2024)	Annual progress	National trajectory 2024 (3)	DESI 2025	Annual progress	NL	EU
Fixed Very High Capacity Network (VHCN) coverage	98.3%	98.4%	0.1%	97.8%	82.5%	4.9%	100.0%	100%
Fibre-to –the-Premises (FTTP) coverage	77.7%	85.3%	9.9%	-	69.2%	8.4%	-	-
Overall 5G coverage	100.0%	100.0%	0.0%	100.0%	94.3%	5.9%	100.0%	100%
Edge Nodes (estimate)	27	59	118.5%	-	2 257	90.5%	-	10000
SMEs with at least a basic level of digital intensity (2)	-	80.8%	0.5%	-	72.9%	2.8%	95.0%	90%
Cloud	60.4%	68.5%	13.5%	-	-	-	85.3%	75%
Artificial Intelligence	14.1%	23.1%	63.5%	23.0%	13.5%	67.2%	85.1%	75%
Data analytics	50.8%	-	-	-	-	-	75.0%	75%
AI or Cloud or Data analytics	74.6%	-	-	-	-	-	-	75%
Unicorns	30	32	6.7%	-	286	4.4%	-	500
At least basic digital skills	82.7%	-	-	-	-	-	100.0%	80%
ICT specialists	6.9%	7.0%	1.4%	7.7%	5.0%	4.2%	9.2%	~10%
eID scheme notification		Yes						
Digital public services for citizens	85.9	88.5	3.1%	85.9	82.3	3.6%	100.0	100
Digital public services for businesses	86.7	88.8	2.4%	86.7	86.2	0.9%	100.0	100
Access to e-health records	72.5	65.2	-10.1%	-	82.7	4.5%	-	100

(1) See the methodological note for the description of the indicators and other metrics
(2) DESI 2025 reports the version 4 of the Digital Intensity Index, that is comparable with the DII value from DESI 2023 (referring to year 2022) for the calculation of the annual progress. It is not comparable to the national trajectory that is based on version 3 of the index.
(3) National trajectory value if present in the national roadmap and if the indicator was measured in DESI2025 (year 2024)

The Netherlands

According to the special Eurobarometer on 'the Digital Decade 2025', 84% of the Dutch public consider that the digitalisation of daily public and private services is making their lives easier. Moreover, 90% consider it important that public authorities counter and mitigate the issue of fake news and disinformation online. Regarding competitiveness, 83% deem it significant that European companies can grow and become 'European Champions' able to compete globally.

A competitive, sovereign, and resilient EU based on technological leadership

The Netherlands' connectivity infrastructure is in good shape, with widespread broadband coverage and excellent 5G services. The National Technology Strategy serves as the guiding policy for the country's digital innovation efforts, outlining key priorities such as semiconductors, AI, quantum technology and cybersecurity. In its approach to semiconductors and quantum technologies, the country aims to strike a balance between promoting technological leadership and protecting its critical supply chains. On the digitalisation of businesses, while most Dutch businesses have achieved a basic level of digitalisation, smaller enterprises often struggle to keep pace with the adoption of key digital technologies, particularly AI. This challenge may be exacerbated by the fragmented nature of AI innovation in the country, which is largely driven by regional partnerships. As a result, funding opportunities and the overall national strategy can appear disjointed and unevenly accessible to these smaller businesses. Finally, to address digital threats and promote digital initiatives, the Dutch Cybersecurity Strategy remains the primary initiative in the Netherlands. Encouragingly, progress was made in 2024 towards centralising government efforts and strengthening public-private collaboration in this area.

Protecting and empowering EU people and society

The Netherlands has a strong digital skills profile with very good scores across regions and genders, although some differences remain across age groups and education levels. Recent budget cuts in higher education, combined with existing ICT labour shortages, could in the future challenge the digital labour market. The roadmap has therefore been adjusted to support ICT teaching and regional plans to increase the ICT workforce. The gender imbalance in ICT specialists in employment and the decline in women employed in this field are also significant. The country has good digital public services and is working on digital accessibility to ensure everyone can participate in the digital transition. It is also continuing its commitment to countering disinformation and safeguarding children's rights online.

Leveraging digital transformation for a smart greening

The Netherlands is stepping up its commitment to sustainable digitalisation with the launch of the Sustainable Digitalisation Action Plan. This plan, which features in the 'Green & Digital' cluster of the Digital Decade's Best Practice Accelerator, outlines measures to leverage digital tools to reduce energy consumption, monitor and mitigate the environmental impact of the digital sector and strengthen public-private collaboration in information sharing.

National digital decade strategic roadmap

The Netherlands submitted a fully revised national Digital Decade roadmap on 31 January 2025. It contains around 15 new measures and four revised targets. In the revised roadmap, the Netherlands addressed a substantial number of roadmap recommendations issued in 2024. The country raised the ambition of its national targets for VHCN, the digitalisation of SMEs and the uptake of data analytics,

aligning them with the EU targets for 2030. The Dutch national target for ICT specialists remains slightly below that of the EU (at 9.2% of the total employed population working as ICT specialists instead of 10%). There is no target for access to e-health records, as it would be difficult to draw up, given the decentralised healthcare system. The revised roadmap continues to prioritise digital public services and shows an increased focus on ICT specialists. It contains **59 measures and has a budget of EUR 5.25 billion, of which EUR 5.22 billion comes from public budgets (equivalent to 0.46% of GDP).** It still covers a diverse range of Digital Decade objectives, with strengthened commitments to the digital and green transition, promoting a human-centred digital space and protecting society online. The roadmap also includes more details on the consultation with stakeholders with respect to the original roadmap.

Funding & projects for digital

The Netherlands allocates 26% of its total Recovery and Resilience Plan to digital (EUR 1.2 billion)[1]. In addition, under cohesion policy, EUR 170 million, representing 11% of the country's total cohesion policy funding, is dedicated to advancing the country's digital transformation[2].

The Netherlands is a member of the 'Alliance for Language Technologies' European Digital Infrastructure Consortium (EDIC) and of the 'Local Digital Twins towards the CitiVERSE' EDIC. The country 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. It is also a participating state of the European High-Performance Computing Joint Undertaking (JU) and of the Chips JU.

The Netherlands has contributed to the Digital Decade Best Practice Accelerator[3] by sharing two best practices in the 'Business Uptake' cluster (with the National technology Strategy) and the 'Green and Digital' cluster (with the Sustainable Digitalisation Action Plan).

Digital rights and principles

According to a support study, the Netherlands has been relatively active in implementing the **European Declaration on Digital Rights and Principles**, with 60 initiatives overall and three new initiatives launched in 2024. The Netherlands is mostly active in ensuring people remain at the centre of the digital transformation, while less activity was identified with regards to ensuring a fair digital environment. Measures related to digital solidarity and inclusion appear to have most impact on the ground, in contrast to those addressing digital safety, security and empowerment.

> **Recommendations**
> - **Quantum/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.

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[1] 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: 16 May 2025.

[2] 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, the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.

[3] The Best Practice Accelerator (BPA) is a platform that enables Member States to share successful measures and challenges encountered in their efforts to meet their Digital Decade targets and objectives. Best practices are made available to Member States via the BPA Repository and showcased in regular workshops, currently focused on three thematic clusters: Digital Skills, Green IT, and the Uptake of Digital Technologies.

- **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.

- **Artificial Intelligence:** strategically allocate a combination of public and private resources to support SMEs' take-up of key digital 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.

- **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.

- **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.