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COVER NOTE

From:	Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director
date of receipt:	16 June 2025
To:	Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union
No. Cion doc.:	COM(2025) 290 annex
Subject:	ANNEX 9 ANNEX to the 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 2025: Keep building the EU's sovereignty and digital future

Delegations will find attached document COM(2025) 290 - Annex 9.

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ANNEX 9

ANNEX

to the

Communication from the Commission to the European Parliament, the Council and the European Economic and Social Committee and the Committee of the Regions

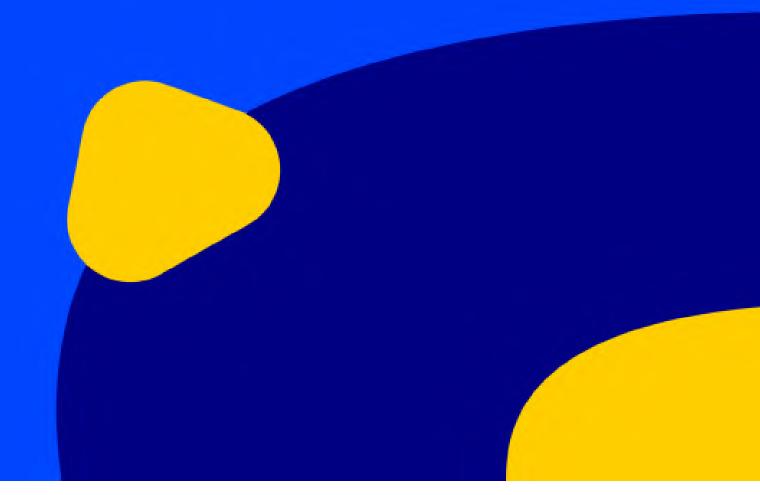**State of the Digital Decade 2025: Keep building the EU's sovereignty and digital future**

{SWD(2025) 290 final} - {SWD(2025) 291 final} - {SWD(2025) 292 final} - {SWD(2025) 293 final} - {SWD(2025) 294 final} - {SWD(2025) 295 final}

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SHORT COUNTRY REPORTS 2025

Estonia

Executive summary

Estonia is positioning itself as a leader in the digitalisation of public services. However, the country lags EU average in connectivity and the digitalisation of SMEs, while has achieved full access to e-Health records before 2030.

In its national roadmap adjustment, Estonia shows a high level of ambition in its contribution to the Digital Decade having set 14 national targets, of which 93% are aligned with the EU 2030 targets. The country is following its trajectories very well with 100% of them being on track (considering 2024 trajectories defined for 8 KPIs out of 8 analysed). Estonia addressed 100 % of the 12 recommendations issued by the Commission in 2024, either by implementing significant policy changes (8%) or making some changes (92%) through new measures.

Estonia focuses on digital sovereignty, through its emphasis on government resilience. The country has put measures in place to ensure that it can continue to be digitally governed beyond its geographical borders in various disaster scenarios. Estonia's roadmap recognises that the country's current challenges require not only introducing new digital measures, but also making sure that well-established digital services function well and are secure. Although Estonia lags behind the EU in terms of overall very high capacity (VHCN) and 5G coverage, it excels in 5G coverage in sparsely populated areas. Cybersecurity continues to be important, as demonstrated by the country's new National Cybersecurity strategy 2024-2030. This strategy prioritises safeguarding digital infrastructure, protecting the country from cyber threats and increasing cybersecurity cooperation.

Digital Decade KPI [1]	Estonia				EU		Digital Decade target by 2030	
	DESI 2024 (year 2023)	DESI 2025 (year 2024)	Annual progress	National trajectory 2024 (3)	DESI 2025	Annual progress	EE	EU
Fixed Very High Capacity Network (VHCN) coverage	76.9%	76.3%	-0.9%	77.0%	82.5%	4.9%	100.0%	100%
Fibre to the Premises (FTTP) coverage	76.9%	76.3%	-0.9%	77.0%	69.2%	8.4%	100.0%	-
Overall 5G coverage	87.5%	91.5%	4.6%	90.0%	94.3%	5.9%	100.0%	100%
Edge Nodes (estimate)	5	10	100.0%	0	2257	90.5%	5	10000
SMEs with at least a basic level of digital intensity (2)	-	71.2%	3.1%	-	72.9%	2.8%	90.0%	90%
Cloud	52.6%	-	-	-	-	-	75.0%	75%
Artificial Intelligence	5.2%	13.9%	167.6%	14.0%	13.5%	67.2%	75.0%	75%
Data analytics	25.6%	-	-	-	-	-	75.0%	75%
AI or Cloud or Data analytics	60.6%	-	-	-	-	-	-	75%
Unicorns	2	2	0.0%	-	286	4.4%	5	500
At least basic digital skills	62.6%	-	-	-	-	-	80.0%	80%
ICT specialists	6.7%	7.2%	7.5%	7.0%	5.0%	4.2%	10.0%	~10%
eID scheme notification		Yes						
Digital public services for citizens	95.8	96.1	0.3%	99.0	82.3	3.6%	100.0	100
Digital public services for businesses	98.8	97.5	-1.3%	100.0	86.2	0.9%	100.0	100
Access to e-Health records	97.5	100.0	2.6%	99.0	82.7	4.5%	100.0	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)

Estonia

According to the special Eurobarometer on 'the Digital Decade' 2025, 79% of Estonian citizens consider that the digitalisation of daily public and private services is making their lives easier. On the action of the public authorities, 88% consider it important to counter and mitigate the issue of fake news and disinformation online, and on competitiveness, 69% consider it important to ensure that European companies can grow and become 'European Champions' capable of competing globally.

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

Estonia is falling behind the EU average in infrastructure indicators (VHCN, 5G), but shows impressive 5G coverage in sparsely populated areas. It is one of the Member States that experienced the biggest expansion of coverage in the 3.4-3.8 GHz band in 2024. Estonia has relied on Recovery and Resilience Facility (RRF) measures to expand VHCN coverage (to be completed in 2025). The country is taking initiatives to increase rural coverage by completing the identification of their white areas (areas without connectivity), which will serve as the foundation for a public consultation (expected to be launched mid-2025). The adoption of advanced technologies by Estonian enterprises paints a mixed picture: the share of those taking up cloud or AI is higher than the EU average, but the share of those taking up data analytics is lower. Across the three technologies, large enterprises consistently reported higher levels of uptake compared to SMEs.

Protecting and empowering EU people and society

Estonia is prioritising the development of its citizens' digital skills through its Digital Agenda 2030. The country performs well in basic digital skills, with small gaps in gender and education levels, and notable digital skills among rural residents and younger generations. Estonia has developed an action plan to equip people with basic digital skills and has focused on educating civil servants and increasing digital skills training, particularly in rural areas. Estonia has identified that managers who lack an understanding of their responsibilities in cybersecurity and risk assessment, and who do not sufficiently align their digitalisation initiatives with the strategic aims of their respective areas, can hinder overall digital transformation. The country's share of ICT specialists in employment is one of the highest in the EU, and its share of female ICT specialists is the highest in the EU. Estonia is well on its way to achieving its digital transformation goal with initiatives such as research on future digital skills needs and collaboration with the University of Tartu to ensure future ICT specialists are enrolled in relevant training. However, the demand for ICT professionals continues to grow, and there is a lack of highly skilled and advanced digital specialists across sectors. Estonia's performance on digital public services and access to e-Health records continues to surpass the EU average, and has reached the Digital Decade 2030 target. Despite this, Estonia will face the challenge of ensuring its digitalised services are up to date with the latest technologies.

Leveraging digital transformation for a smart greening

According to Estonia's Digital Agenda 2030, the country aspires to become the world's greenest digital government; however, it currently lacks a systematic approach or strategy to achieve this goal. Estonia launched a Sustainability Reporting Tool and relies on private sector initiatives that aim to increase the lifespan of ICT devices and to reduce overall energy consumption.

National digital decade strategic roadmap

Estonia submitted a fully revised national Digital Decade roadmap on 27 March 2025. It reports on the consultation of stakeholders and addresses a limited number of the roadmap recommendations

issued in 2024. In the updated roadmap, Estonia includes 13 new targets and one revised target, all in line with the EU's level of ambition. Although it provides some information on planned activities to achieve the country's targets, it lacks detailed information on the budget allocated to each area and the specific aims and scope of the different activities. The roadmap puts a strong emphasis on quantum computing, EU-level cooperation and digital skills and puts a new emphasis on high-performance computing, resilience and security. However, the green transition is reflected less in the roadmap.

Funding & projects for digital

Estonia allocates 24% of its total recovery and resilience plan to digital (EUR 208 million)[1]. In addition, under cohesion policy, EUR 373 million, representing 11% of the country's total cohesion policy funding, is dedicated to advancing Estonia's digital transformation[2].

Estonia is a member of the Local Digital Twins towards a CitiVERSE European Digital Infrastructure Consortium (EDIC). The country is a participating state of the EuroHPC Joint Undertaking (JU) and of the Chips JU.

Estonia has not yet presented any measure in the framework of Digital Decade's Best Practice Accelerator[3].

Digital rights and principles

According to a support study, Estonia has shown rather limited activity in implementing the **European Declaration on Digital Rights and Principles**, with 39 initiatives overall and 6 new initiatives launched in 2024. Estonia is most active in the area of protected, safe and secure digital environment. Less activity has been identified with regards to fair digital environment. Measures in the area of freedom of choice appear to have most impact on the ground, in contrast to those addressing Participation in the digital public space.

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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.

Recommendations

- **Connectivity**: Continue and establish new measures that target enhancing VHCN, and 5G coverage.
- **Digital skills**: Introduce digital skills measures targeted to mid-level managers to be able to lead the digitalisation process for their employees and enterprises.
- **ICT specialists**: Continue to implement measures to educate ICT specialists to fill the current gap.
- **SMEs**: Sustain and complement activities to improve digitalisation and uptake of advanced technologies and give special attention to SMEs.
- **Digitalisation for public services**: Improve the useability of the digital public services to ensure that they are accessible to all as well as to ensure that its services are up to date.
- **Green**: Implement a coherent green digitalisation strategy to be able to keep up with the country's ambition of being the world's greenest digital government.
- **Cybersecurity:** Continue efforts in cybersecurity to address the evolving and increasing threats. Ensure continuation in the implementation of cybersecurity classes.