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PART 2/27

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

Belgium

Belgium

Contents

Executive summary

Belgium demonstrates strong overall performance in the Digital Decade, combining high connectivity take-up, advanced digitalisation of businesses and very strong digital public services. High internet use among individuals, strong household internet connectivity and a growing level of digital skills reflect a digitally engaged population and provide a favourable environment for digital transformation across the economy. However, structural challenges remain in fibre-to-the-premises deployment, advanced digital skills and ICT specialist shortages, ultrafast broadband uptake and the scale-up of innovative firms.

Some of the structural gaps identified may affect Belgium's ability to fully translate its strong digital foundations into productivity gains, economic growth and overall competitiveness. Shortages of advanced digital skills and ICT specialists may limit the diffusion of advanced digital technologies across sectors and constrain firms' capacity to innovate and scale. Likewise, delayed fibre-to-the-premises deployment and moderate uptake of ultrafast broadband may reduce the potential benefits of next-generation connectivity for businesses and public services.

Belgium can nevertheless rely on several strong digital leadership assets. The country hosts one of Europe's leading semiconductor research ecosystems through Imec and remains highly active in emerging technologies such as artificial intelligence (AI), quantum computing and edge computing infrastructure. Belgium also benefits from a dynamic innovation ecosystem and strong collaboration between research institutions, industry and public authorities, which supports the development and deployment of advanced digital technologies.

Belgium in the Digital Decade

Belgium shows a high level of ambition in its contribution to the Digital Decade, having set 14 national targets (out of 14 possible), 93% of which aligned with the EU's targets for 2030. In its national roadmap, Belgium provided 12 trajectory points for 2025 (out of 13 analysed). The country is pursuing them moderately well, with 58% considered on track. Belgium addressed 71% of the 7 recommendations issued by the Commission in 2025, either by implementing significant policy changes (14%) or making some changes (57%) through new measures.

Belgium submitted an updated Digital Decade national roadmap in January 2026. The roadmap contains 128 measures, of which 37 are new measures. The total budget is EUR 664 million (mostly coming from public budgets), corresponding to approximately 0.1% of Belgium's GDP in 2025. According to the national roadmap, by the end of 2026, 24% of the measures will come to an end. The total public budget associated with these measures is EUR 248 million, constituting 37% of the total public budget outlined in the roadmap.

According to the 2026 Digital Decade Eurobarometer, 80% of Belgians consider that digital policy should have a very high or high priority for the EU in shaping our future in Europe. They also think that, in the next ten years, EU bodies should cooperate with Member States to improve cybersecurity and protection from online threats (93%), strengthen the regulation of online platforms (84%) and

promote digital education and skills programmes (83%). In addition, **81% of Belgian respondents think that the EU should reduce its dependencies on digital technology from outside the EU,** and **86%** that the EU should prioritise investment in digital infrastructure and services that are developed and regulated in Europe. Meanwhile, **61%** 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

Belgium has allocated 27% of its total recovery and resilience plan (EUR 1.3 billion) to digital technologies. In addition, under cohesion policy, EUR 0.4 million, representing 14% of the country's total cohesion policy funding, is dedicated to advancing Belgium's digital transformation.

Belgium hosts the EUROPEUM European digital infrastructure consortium (EDIC). It is also a member of the Local Digital Twins towards the CitiVERSE EDIC. Belgian entities are indirect or associated partners in the Important Projects of Common European Interest on Microelectronics and Communication Technologies (IPCEI-ME/CT) and in the IPCEI on Next-Generation Cloud Infrastructure and Services (IPCEI-CIS). Belgium is a participating state in the EuroHPC Joint Undertaking (JU) and of the Chips JU.

Digital Decade KPI (1)	Belgium				EU		Digital Decade target by 2030	
	Latest available data (2)	DESI 2026 (year 2025)	Annual progress	National trajectory (3)	DESI 2026	Annual progress	BE	EU
Fixed Very High-Capacity Network (VHCN) coverage	93.8%	96.2%	2.6%	96.0%	85.5%	3.7%	100.0%	100%
Fibre to the Premises (FTTP) coverage	30.7%	35.5%	15.7%	40.0%	74.1%	7.1%	82.0%	-
Basic 5G coverage	96.9%	99.9%	3.2%	99.5%	96.8%	2.6%	100.0%	100%
Edge Nodes (estimate, new methodology)	-	176	-	34	7451	-	164	10 000
SMEs with at least a basic level of digital intensity*	74.5%	84.4%	6.4%	81.9%	71.4%	11.0%	90.0%	90%
Cloud*	47.7%	58.5%	10.8%	67.0%	46.7%	9.5%	75.0%	75%
Artificial Intelligence	24.7%	34.5%	39.8%	20.0%	20.0%	48.0%	75.0%	75%
Data analytics*	44.5%	52.1%	8.2%	53.0%	39.9%	9.5%	75.0%	75%
AI or Cloud or Data analytics*	64.2%	74.5%	7.7%	-	63.2%	7.5%	-	75%
Unicorns	7	8	14.3%	-	324	10.2%	14	500
At least basic digital skills*	59.4%	61.2%	1.5%	65.6%	60.4%	4.3%	80.0%	80%
ICT specialists	5.7%	5.9%	3.5%	7.6%	5.0%	2.0%	10.0%	~10%
e-ID scheme notification		Yes						
Digital public services for citizens	81.4	81.6	0.2%	89.0	84.6	2.8%	100.0	100
Digital public services for businesses	95.4	96	0.6%	96.0	88.6	2.7%	100.0	100
Access to electronic health records	100.0			100.0	86.5	4.6%	100.0	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

Belgium combines strong technological assets with persistent structural bottlenecks in digital infrastructure. It benefits from a high-performing research and innovation ecosystem and plays a leading role in strategic technologies, notably semiconductors through Imec, while also strengthening its position in quantum computing and edge computing infrastructure. Belgian businesses perform strongly in adopting advanced digital technologies, with high levels of SME digitalisation and adoption by companies of cloud, data analytics and AI. However, these strengths have not yet fully translated into scale-up performance and broader business dynamism for long-term competitiveness, with constraints in growth financing, scaling and diffusion of advanced technologies – including AI – across the wider economy, as well as in translating strong adoption into large-scale deployment and integration across strategic sectors.

Connectivity and cybersecurity remain key constraints on technological competitiveness. Belgium benefits from very high VHCN coverage and near-universal 5G, but FTTP rollout remains the lowest in the EU. Gaps also persist in the deployment and effective use of 5G pioneer bands, especially in the 3.4-3.8 GHz band. Fragmented permitting procedures, regulatory divergence across governance levels, modest gigabit uptake and limited demand for parts of the 5G spectrum continue to reduce the economic impact of connectivity. At the same time, **Belgium is well equipped in cybersecurity,** with strong institutional capacity, high SME uptake of cybersecurity measures and progress in implementing NIS2. However, uneven SME maturity, shortages of specialised profiles and emerging risks linked to cloud dependencies, supply chains and AI-enabled threats remain weak points.

Protecting and empowering EU people and society

Belgium combines broad digital participation with persistent inclusion and skills gaps. Basic digital skills are slightly above the EU average, internet use is widespread and the use of generative AI is comparatively high, reflecting a digitally engaged population. However, progress in improving basic digital skills remains slower than the EU average and the share of people with above-basic digital skills remains below the EU average. Structural disparities also persist, particularly among women, older people and, especially, individuals with low formal education, while digital safety skills remain below the EU average. Together with continued exposure to hostile or degrading online content, these gaps point to the need for targeted training efforts, particularly for people with low levels of education, older adults and women, alongside stronger digital safety and media literacy skills. More outcome-oriented coordination across education, adult learning, labour-market and local inclusion policies could help improve effectiveness and monitoring of interventions.

Belgium also performs very strongly in digital public services, especially for businesses and in access to electronic health records; this is supported by a mature digital identity ecosystem and continued progress in eHealth. High use of eGovernment and fully operational access to electronic health records are important strengths. At the same time, citizen-facing services remain less advanced than business-

oriented ones, and gaps persist in transparency, cross-border performance and the integration of services across life events and governance levels. Fragmentation across federal, regional and local responsibilities therefore remains a structural obstacle to fully seamless, user-centric public digital services.

Recommendations

- **Basic digital skills:** Strengthen Belgium's digital skills base, particularly among groups facing persistent digital inclusion barriers, while improving coordination, monitoring and policy effectiveness across governance levels.
- **ICT specialists:** Increase the supply of ICT specialists by strengthening skills pipelines and better aligning education, training and labour-market needs, including for advanced digital technologies and underrepresented groups.
- **Digitalisation of SMEs and advanced technologies take-up:** Strengthen the digitalisation of SMEs and the uptake of advanced digital technologies by improving the effectiveness, visibility and coordination of support measures and facilitating the deployment of advanced digital solutions.
- **Artificial intelligence:** Accelerate the adoption and scaling of AI, particularly by SMEs and in strategic sectors, by strengthening AI infrastructure and ecosystem support, facilitating the deployment of AI solutions and use cases, and improving coordination across governance levels and key stakeholders.
- **Fixed and mobile connectivity:** Accelerate the rollout and take-up of gigabit-capable connectivity by addressing persistent deployment bottlenecks, supporting fibre and 5G deployment across all regions, fostering the copper networks switch off, promoting effective use of next-generation connectivity infrastructure, and strengthening conditions for investment and adoption.
- **Cybersecurity:** Strengthen cybersecurity resilience among SMEs and critical sectors, including by supporting preparedness, improving the uptake of cybersecurity measures among less mature organisations, and reinforcing resilience against emerging risks such as AI-enabled threats.
- **Green and digital:** Translate monitoring of the environmental footprint of digitalisation into coordinated policy action, including through measurable objectives, strengthened reporting and actions to reduce the environmental footprint of digital infrastructures and services.

A competitive, sovereign and resilient EU based on technological leadership

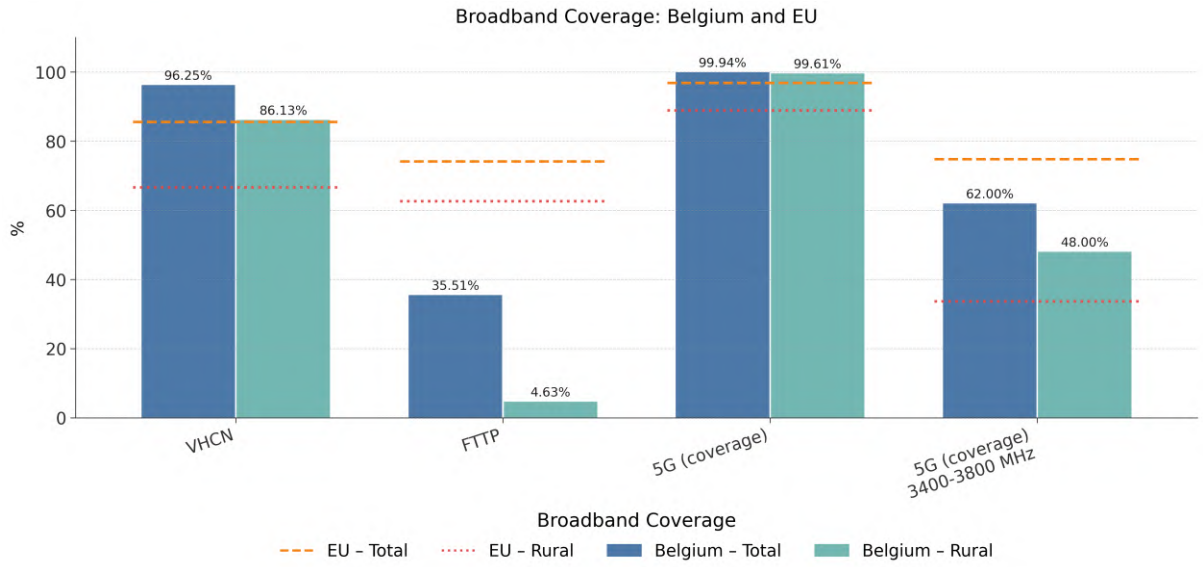
Building technological leadership: digital infrastructure and technologies

Connectivity infrastructure

Performance assessment

Belgium achieved a fixed very high-capacity network (VHCN) coverage rate of 96.25% in 2025, after an increase of 2.6% since the previous year. This is above the EU average of 85.54%. Its annual growth rate was lower than the EU's 3.7%. In sparsely populated areas, Belgium's VHCN coverage reached 86.13%, also above the EU average of 66.66%, after growth of 6.6%, slightly below the EU's 7.7%. The country is on track compared to its trajectory presented in the Digital Decade national roadmap.

Belgium's fibre-to-the-premises (FTTP) coverage reached 35.51% in 2025, which constituted a significant increase of 15.7%, but coverage remained far below the EU average of 74.13%. Belgium's growth rate was higher than the EU's 7.1%, although this is partly thanks to its low starting point. In sparsely populated areas, FTTP coverage was only 4.63%, well below the EU average of 62.61%, despite progress from 2.05% in 2024. The country is lagging behind its national trajectory.



In 2025, Belgium's overall 5G coverage reached 99.94% (+3.2% from 2024), exceeding the EU average of 96.79%. The country is progressing in line with its national trajectory. In sparsely populated areas, coverage rose to 99.61%, well above the EU average of 88.88%, with strong growth (+42.8%), significantly higher than the EU rate (+11.7%).

Belgium's 5G coverage in the 3.4-3.8 GHz band was 62.0% (+25.7%), remaining below the EU average of 74.75%, despite faster growth than the EU (+10.6%)[1]**.** There is an absence of 5G SA base stations;

[1] *European 5G Observatory 2026*

the EU average for the share of 5G SA base stations is 20.9%. This 3.4-3.8 GHz mid-band is crucial because it provides a good balance between coverage with high capacity, making it a cornerstone of advanced 5G use cases, one that can be replicated as a reference model across sectors and socio-economic situations. These include applications in manufacturing, such as the industrial Internet of Things, and healthcare, for example telemedicine. In sparsely populated areas, coverage in this band increased to 48.0%, above the EU average of 33.71%, although growth (+21.1%) was lower than the EU rate (+32.9%). The upcoming expiry spectrum licences in 2030 presents an opportunity to establish pro-investment conditions[2].

Belgium performs strongly overall, consistently exceeding the EU average, in fixed VHCN and 5G coverage. However, FTTP coverage remains a clear weakness and is well below the EU average. Growth trends are mixed: Belgium outperforms the EU in overall 5G coverage and in rural FTTP growth, but remains well below the EU average in rural FTTP coverage levels and lags behind in other areas, including rural VHCN growth and 5G coverage in the 3.4–3.8 GHz band. Overall, while performance is strong, deficiencies persist in fibre deployment and mid-band 5G coverage, which remain key areas for further development.

The table below provides an overview of VHCN, FTTP and 5G coverage across NUTS-2 regions in Belgium. It shows that VHCN and 5G coverage are consistently high across all regions, approaching full coverage. By contrast, FTTP deployment remains uneven across provinces, with particularly high coverage in the Brussels-Capital Region (78.52%) and Brabant walloon (55.62%), while coverage remains below 11% in provinces such as Luxembourg and Limburg, highlighting persistent regional disparities in fibre rollout.

	VHCN coverage		FTTP Coverage		5G Coverage	
	Overall	Rural	Overall	Rural	Overall	Rural
National coverage	96.25%	86.13%	35.51%	4.63%	99.94%	99.61%
Prov. Antwerpen	98.60%	93.38%	37.14%	5.66%	100.00%	100.00%
Prov. Brabant wallon	99.74%	95.61%	55.62%	17.94%	100.00%	100.00%
Prov. Hainaut	96.35%	82.60%	40.80%	8.53%	99.75%	98.39%
Prov. Liège	95.05%	79.76%	35.55%	3.00%	100.00%	99.99%
Prov. Limburg (BE)	99.15%	95.09%	10.88%	2.27%	100.00%	100.00%
Prov. Luxembourg (BE)	84.06%	68.72%	5.80%	3.46%	99.58%	99.53%
Prov. Namur	91.39%	76.69%	26.78%	5.09%	99.54%	98.86%
Prov. Oost-Vlaanderen	98.21%	91.55%	24.17%	2.65%	100.00%	100.00%
Prov. Vlaams-Brabant	98.06%	93.21%	22.94%	1.76%	100.00%	100.00%
Prov. West-Vlaanderen	98.10%	89.76%	28.93%	2.82%	100.00%	100.00%
Région de Bruxelles-Capitale/ Brussels Hoofdstedelijk Gewest	89.73%	65.33%	78.52%	41.33%	100.00%	100.00%

[2] Pro-investment conditions include longer licence durations to strengthen investment certainty, coverage obligations to accelerate deployment and reasonable spectrum prices that preserve capital for network rollout.

In terms of take-up, fixed broadband subscriptions with speeds of 1 Gbps or more Belgium are at 8.7% after an increase of +54.6% in 2025, but this figure stands below the EU average of 26.97%. In 2024, the share of such subscriptions in Belgium was 5.53%, significantly lower than the 22.25% in the EU as a whole. Although Belgium's annual growth rate of 54.6% outpaces the EU's 21.2%, the country still lags behind the EU average in terms of overall penetration.

Belgium reached 43.87% in 2025 for the share of 5G SIM cards in the total population, marking an increase of 40.7% from the previous year. This figure, however, remains below the EU average of 55.55%, the product of a growth of 56.2% from the previous year. In 2024, Belgium's share was 31.19%, which lagged behind the EU's 35.56%. While Belgium is expanding its 5G penetration, it is doing so at a slower pace than the EU as a whole.

Policy context and assessment of recommendations

Belgium's digital infrastructure combines very high overall gigabit coverage with structural imbalances across technologies and governance levels. The country maintains one of the highest levels of VHCN coverage in the EU, largely driven by extensive DOCSIS 3.1 cable networks. It has also largely overcome its earlier 5G deployment lag, reaching near-universal coverage and high network quality. However, this strong cable footprint has reduced the commercial urgency of fibre deployment. As a result, Belgium combines very high gigabit availability with comparatively low fibre penetration. Despite recent progress, FTTP coverage remains the lowest in the EU, making fibre rollout the country's main structural connectivity gap.

In terms of connectivity take-up, Belgium continues to lag behind the EU average in 5G adoption, suggesting scope for further progress. Although high-speed fixed broadband subscriptions are increasing, overall penetration remains comparatively moderate. Future developments will probably depend on a combination of infrastructure rollout, market conditions and user uptake.

Belgium is adapting its regulatory framework to address some of these challenges, in particular through the implementation of the Gigabit Infrastructure Act. The national implementation act was adopted on 27 March 2026 and coordination with federated entities is ongoing to ensure consistency across regulatory frameworks. A single national digital entry point is also being developed to provide information on applicable.

At the same time, cooperation models between operators are emerging to accelerate fibre deployment, particularly in medium-density areas. These arrangements aim to share investment costs and expand coverage; they require careful regulatory oversight to ensure open access and competition.

Demand-side dynamics remain a key constraint. Despite high availability of high-capacity infrastructure, gigabit uptake is still limited. Many households consider current speeds sufficient, while higher-speed offers often come with a price premium. Belgium remains among the more expensive EU countries for high-capacity broadband, which further constrains adoption. As a result, infrastructure availability is not yet fully translating into effective use.

In mobile connectivity, Belgium has achieved strong overall 5G coverage, but important gaps remain in mid-band deployment, particularly in the 3.4-3.8 GHz band. Rollout is influenced by a range of factors, including regulatory conditions such as EMF limits and licensing arrangements. In addition,

limited demand for certain frequency bands, and persistent public concerns regarding radiation, continue to act as deployment disincentives. While non-standalone 5G is now widespread, the transition towards more advanced standalone capabilities remains gradual, constrained by business-case uncertainty and limited consumer demand.

High coverage also does not automatically translate into equally high usage. While mobile data consumption has more than tripled over the last 5 years, only a limited share of traffic currently runs on 5G networks. This suggests that some of the economic potential of next-generation infrastructure remains underexploited, whether due to device replacement cycles, business use cases or consumer uptake patterns. The next phase will therefore depend on stimulating take-up and enabling applications that translate connectivity gains into productivity, innovation and better public services.

Belgium is also progressing in the transition away from legacy copper networks. The switch-off process, launched in 2023, is being implemented gradually alongside fibre rollout. While copper still accounted for around 35% of retail broadband lines in 2024 (down from 47% in 2018), its role is declining rapidly as higher-capacity networks expand. At the current pace, copper is projected to constitute **less than 25% of retail lines by 2030**. The phase-out is expected to follow a gradual but structured trajectory.

Public programmes complement market-driven deployment, particularly in less commercially viable areas. At federal level, 2 calls in 2022 and 2023 were launched by the Broadband Competence Office of the FPS Economy for a total budget of EUR 26,5 million to deploy VHCN to reduce the still remaining white zones In Belgium. With these calls approximately 15.000 households have been connected to VHCN. The Broadband Competence Office also supported the deployment of innovative 5G-applications in Belgian enterprises, by funding 36 5G pilot projects at federal level through 3 separate calls in 2022, 2023 and 2024 for a total amount of approximately EUR 35 million. In Wallonia, the Giga Region programme supports connectivity rollout through targeted measures, including the Last Mile call for projects, with a regional budget of EUR 33 million (2022-2026). In parallel, a special partnership between private and public sector (called “Accord ToP for Tax-on-Pylone) enabled the investment of more than 45 million in the modernisation of infrastructures in white zones. In the German-speaking Community, the Digital Strategy for Ostbelgien promotes fibre deployment, 5G rollout and broader digital infrastructure development. The GOfiber public-private partnership aims to connect 98% of households in the German-speaking Community by 2026, addressing remaining rural gaps. Connectivity upgrades are also integrated into school infrastructure modernisation.

Market structure remains a defining feature of Belgium’s connectivity landscape. The sector is characterised by a high degree of concentration, with a limited number of infrastructure operators and a duopolistic structure in each region corresponding to a cable operator’s footprint. While competition has increased in the mobile segment, notably with the entry of Digi, competitive pressure in the fixed market remains more limited.

Retail prices for fixed telecom services in Belgium continued to increase. The impact of Digi’s entry in December 2025 has not yet been reflected in price developments given the recency of its entry. In late 2025, the three main operators – Proximus, Orange Belgium and Telenet/VOO – announced further tariff increases, citing inflation, labour costs and fibre investment. Market concentration remains an important feature of the sector. Although multiple brands operate on the market, most belong to the three incumbent groups (e.g. Scarlet and Mobile Vikings under Proximus; hey! telecom and VOO under Orange; Base under Telenet). This is reflected in market outcomes, with the three main

operators accounting for around 90-95% of the fixed broadband market, leaving a relatively small share to alternative providers and limiting the scope for effective competition. Belgium remains among the more expensive EU Member States for telecom services. An analysis by the Belgian Institute for Postal Services and Telecommunications (BIPT) has confirmed that widely used high-capacity fixed broadband plans rank among the highest in the EU. Digi's EUR 10 monthly offer illustrates the potential for more affordable pricing, but its impact could remain constrained by limited network deployment and fibre rollout challenges. As a result, affordability and market structure continue to weigh on connectivity uptake, with sustained high prices potentially restricting access, particularly for low-income households.

Competition conditions differ across segments of the Belgian telecom market. While the mobile sector shows some improvements relative to previous assessments, the fixed broadband segment remains more structurally constrained, with higher levels of market concentration and regulatory restrictions. Evidence from the OECD Product Market Regulation (PMR) report for Belgium points in the same direction, highlighting more restrictive conditions in fixed networks compared to the OECD average. In this context, price developments remain an important factor shaping connectivity uptake and investment incentives in Belgium, as also reflected in Mobile and Fixed Broadband Prices in Europe 2024.

According to the 2026 Digital Decade Eurobarometer, 79% of Belgian people consider that making the EU a global leader in technological innovation and infrastructure is important, while 52% believe that the EU is already a world leader in digital innovation and technology.

2025 recommendation on fixed and mobile connectivity: To enhance digital infrastructure, (i) focus on accelerating FTTP deployment, particularly in sparsely populated areas; and (ii) direct efforts towards increasing the assignment of harmonised spectrum in the 5G pioneer bands.

In 2025, Belgium continued the implementation of existing measures but did not take any new measures. Fibre rollout accelerated, supported by continued deployment, further progress in 5G, and regulatory follow-up linked to the implementation of the Gigabit Infrastructure Act. However, FTTP coverage remains the lowest in the EU and continues to be constrained by persistent structural barriers, especially fragmented permitting, regulatory divergence across governance levels, coordination challenges and high rollout costs. Evidence gathered through the Digital Decade process suggests that further progress could benefit from more streamlined permitting procedures, better alignment of rollout conditions across governance levels, continued support for copper-network switch-off in line with fibre deployment, and wider deployment and effective use of 5G pioneer bands and standalone 5G networks.

The analysis points to the importance of further accelerating fibre rollout, including through more coordinated approaches to funding and regulation across governance levels. Persistent regional disparities, particularly in rural areas, suggest that the current pace and distribution of deployment remain uneven, reflecting structural constraints in permitting, coordination and investment conditions. At the same time, the relatively low take-up of high-speed connections indicates that infrastructure deployment alone is not sufficient to drive adoption. While VHCN coverage is already widespread, FTTP deployment remains comparatively limited. Further expansion of fibre networks, alongside appropriate regulatory and investment conditions, would increase the availability of gigabit-capable connections. However, infrastructure deployment alone is unlikely to drive

adoption, and demand-side barriers will also need to be addressed. In this context, the progressive phase-out of copper networks emerges as a key enabling factor for shifting usage towards fibre and improving overall network efficiency. Strengthening these conditions would help sustain investment dynamics and enhance the socio-economic impact of high-capacity connectivity.

Furthermore, significant disparities persist between urban and rural areas, where fibre deployment remains particularly limited. Limited progress has also been observed in the effective use of harmonised 5G spectrum, with continued gaps in mid-band deployment and weak take-up despite regulatory availability. Overall, implementation remained partial.

Semiconductors

Belgium strengthened its position in the European semiconductor ecosystem with the inauguration in February 2026 of the NanoIC pilot line at Imec in Leuven. The milestone includes a 2 000 m² cleanroom expansion, bringing Imec's total cleanroom capacity to more than 12 000 m²; it will host next-generation equipment aimed at developing technologies beyond the 2-nanometre node. The facility constitutes a central contribution to the implementation of the European Chips Act and is designed to provide industry, start-ups and research partners with access to state-of-the-art manufacturing and experimentation environments. Over the coming years, the initiative foresees the integration of more than a hundred additional tools across the European consortium, reinforcing cross-border cooperation and strengthening Europe's capacity in advanced chip R&D and prototyping. The project benefits from strong financial support from the EU as well as from national and Flemish regional authorities and is accompanied by further expansion plans, including the construction of an additional cleanroom at the Leuven campus. By anchoring leading-edge infrastructure and attracting global technology partners, Belgium is consolidating its role as a strategic hub for semiconductor research, talent and industrial collaboration, with expected spillover benefits for innovation, competitiveness and supply-chain resilience across the EU. Beyond research capacity, the initiative increases Belgium's attractiveness for global partnerships, supports European supply-chain resilience and anchors high-value employment and skills development in the EU.

Belgium's semiconductor ecosystem also benefits from strong collaboration between research institutes, universities and industry clusters, particularly around Imec and its network of international industrial partners, which contributes to the development of advanced semiconductor design, manufacturing processes and next-generation chip architectures. In 2026, Imec additionally reported a world-first demonstration of silicon spin qubits fabricated using High NA EUV lithography, further reinforcing Belgium's position in next-generation semiconductor and quantum hardware research.

While Belgium plays a leading role in semiconductor research and pilot-line infrastructure, the country remains primarily positioned in the upstream segments of the value chain, particularly in research, prototyping and design. Scaling industrial manufacturing capacity within Europe and ensuring long-term access to advanced manufacturing equipment, materials and talent will remain critical challenges for strengthening Europe's strategic autonomy in semiconductors.

Wallonia is also taking a significant step forward in the strategic field of semiconductors with the Chips Wallonia Innovation Centre (ChipsWIN) initiative. The centre aims to support Walloon start-ups, spin-offs and SMEs in taking their projects from the laboratory to the market, by providing them with access

to expensive equipment and cleanrooms for prototyping and producing their first electronic components. The aim is not to recreate a new Imec in Wallonia, but to harness local expertise and strengthen the Walloon ecosystem, which already includes leading players.

Edge nodes

Performance assessment

According to the Edge Node Observatory, Belgium is estimated to have deployed a total of 176 edge nodes by 2025. Due to a change in methodology, this number cannot be compared to previous estimates.

Policy context and assessment of recommendations

In 2025, Belgium intensified its focus on edge computing through the lens of technological sovereignty. The country's edge computing ecosystem is closely linked to its broader digital infrastructure and innovation landscape, including high-performance computing, AI development and research infrastructure. Initiatives connecting research centres, digital innovation hubs and industry actors contribute to strengthening the edge–cloud continuum in Belgium and facilitating experimentation with distributed computing architectures.

Belgium also supports the development of edge AI technologies through targeted testing and experimentation infrastructure, notably the testing and experimentation facility for edge AI chips, which enables hardware developers to validate solutions and accelerate time-to-market. These efforts contribute to positioning Belgium within emerging European edge AI value chains and support broader technological sovereignty objectives[3].

Regional and European initiatives also support edge-enabled services. For example, in the Brussels-Capital, the sustAIn.brussels European Digital Innovation Hub provides access to testing facilities, computing infrastructure, training and financing, enabling experimentation with AI and distributed computing solutions. Belgium also participates in European initiatives to strengthen access to advanced computing resources. The planned AI Factory Antenna under the EuroHPC programme aims to expand access to AI-optimised infrastructure and services, supporting edge and cloud-based applications.

Public-private cooperation between research institutions, start-ups and industry supports experimentation with distributed AI processing and real-time data use in sectors such as manufacturing, logistics and smart infrastructure.

Quantum technologies

In 2025, Belgium continued to reinforce its leadership in quantum computing, including in infrastructures and research. The quantum ecosystem is expanding around institutions such as Imec, universities and specialised centres, contributing to the development of quantum hardware,

[3] D4 Edge nodes deployment progress report_v3_clean (003).pdf => Edge Nodes Deployment Progress Report – Deployment trends (market, policies, and international benchmarking), Edge Observatory for the Digital Decade – Edge Computing Nodes: Continuous Deployment Monitoring – Study No 2024 – 007, December 2025

algorithms and applications. Belgian research groups also participate actively in European initiatives, including projects under Horizon Europe and EuroHPC.

Belgium's strong research base in microelectronics and photonics provides favourable conditions for developing quantum technologies and integrating them with semiconductor and computing infrastructures. Recent research advances by Imec in silicon-based quantum computing illustrate the potential of leveraging Belgium's semiconductor expertise to support the industrial scaling of quantum technologies. Research institutions and innovation clusters such as Imec, alongside initiatives like Quantum Circle and Quantum4Belgium, foster collaboration between academia, industry and start-ups to accelerate development and commercialisation.

Belgian actors are also involved in European efforts to strengthen access to advanced computing infrastructure and enable experimentation with emerging technologies such as AI and quantum computing. These collaborations support Europe's capabilities in quantum computing, communication and sensing, while developing specialised skills and cross-border networks.

Overall, Belgium combines strong research assets with favourable conditions for quantum development, although translating research excellence into scalable industrial applications remains a key challenge. In this context, Belgium is developing a federal strategy on quantum technologies in 2026, which may contribute to strengthening coordination and supporting the further development of the national quantum ecosystem.

Supporting EU-wide digital ecosystems and scaling up innovative enterprises

SMEs with at least basic digital intensity

Performance assessment

Belgium is at 84.35% of SMEs with at least a basic level of digital intensity, after an increase of 6.4% annually between 2023 and 2025. The figure exceeds the EU average of 71.39%. Belgium was already above the EU average by 2023, at 74.46% compared with 57.90%. Although Belgium's growth rate is lower than the EU's 11.0%, Belgian SMEs remain among the most digitally advanced in the EU. The country is on track according to the trajectory presented in its Digital Decade national roadmap and is approaching the 2030 target of 90%.

As for SMEs with a very high digital intensity index, the figure in Belgium is 18.43%, after an increase of 48.9% annually between 2023 and 2025. This is well above the EU average of 9.07%. Belgium was already above the EU average by 2023, at 8.31% compared with 4.38%. Belgium also performs strongly on complementary business digitalisation indicators: 61.25% of SMEs use electronic information sharing systems, 80.57% use social media, 30.15% sell online (i.e., with e-commerce sales accounting for at least 1% of turnover), and online sales account for 19.66% of SME turnover, the second highest figure in the EU.

Overall, Belgium is entering the second half of the Digital Decade from a position of strength: basic digital diffusion among SMEs is largely achieved, and a significant share of firms are already moving towards advanced digital use, including higher levels of digital intensity and adoption of emerging technologies such as AI.

Belgium

Policy context and assessment of recommendations

The high level of SME digitalisation is a structural asset for Belgium's competitiveness, productivity and resilience. The country benefits from a dense SME fabric, strong integration in European value chains and a powerful research and innovation ecosystem. Public policy across all governance levels has consistently supported business digitalisation through a broad mix of grants, advisory services, innovation intermediaries and cluster organisations. A number of these measures are supported under the Recovery and Resilience Plan (RRP), particularly in areas such as digital innovation, AI experimentation environments and the strengthening of digital innovation ecosystems. Belgium also remains actively involved in EU-level initiatives to strengthen digital industrial capacity. The country participates in several IPCEIs that contribute to the development of strategic digital value chains at EU level.

Belgian authorities nevertheless emphasise that a persistent gap remains between large firms and smaller companies in the adoption of advanced digital technologies, particularly AI, cloud computing and data analytics. Reaching smaller firms and supporting them in moving from experimentation to operational deployment is therefore seen as a key priority for the coming years.

Recent initiatives illustrate the diversity of this support landscape. These include the development of data ecosystems through initiatives such as Athumi, innovation and entrepreneurship acceleration through Imec programmes, and regional transformation strategies such as Digital Wallonia and the Shifting Economy framework. Together, these initiatives aim to support the adoption and diffusion of digital technologies across value chains and strengthen the capacity of SMEs to experiment with and deploy advanced solutions.

In 2025, Belgium placed increasing emphasis on improving the measurability and effectiveness of existing support instruments. Rather than creating new schemes, authorities focused on strengthening the links between innovation support structures – including clusters, innovation hubs and intermediary organisations – and measurable outcomes aligned with the Digital Decade framework. Monitoring efforts are increasingly focusing on indicators such as the number of SMEs moving from experimentation to operational deployment, the business functions concerned and the diffusion of digital solutions across value chains.

At federal level, the SME Plan adopted in January 2026 introduces measures aimed at supporting SME development and competitiveness, including actions relevant to digitalisation and innovation. These include fiscal incentives for digital investment, tools to support e-commerce uptake among smaller firms, and measures to facilitate university spin-offs and improve access to talent, including proposals for a technology visa scheme.

The policy landscape reflects Belgium's multi-level governance structure, with differentiated levels of maturity across regions. **Wallonia** operates the most explicit policy mix for SME digital transformation, combining financial instruments, cluster mobilisation and sectoral strategies under **Digital Wallonia**, thanks to the public services of 'Wallonie-Entreprendre'. The **Brussels-Capital Region** acts primarily as a hub for knowledge-intensive services and headquarters activities and operates more targeted instruments supporting SME digitalisation. At **federal level**, policy action focuses mainly on framework conditions, regulatory preparation and information support. While this diversity reflects regional priorities and economic structures, it also reinforces the need for clearer national visibility and coordination of digital transformation policies. Several operational instruments aim to broaden

the diffusion of digital technologies among SMEs. These include digital maturity assessment tools, SME advisory programmes and European Digital Innovation Hubs (EDIHs) providing services such as test-before-invest facilities, skills training, access to finance support and ecosystem networking. Authorities stress that integrated service models developed by EDIHs help accompany SMEs throughout the digital transformation journey, from awareness-raising and experimentation to implementation and scaling.

The **Brussels-Capital Region** continues to support SME digitalisation through a grant programme funding external consulting missions focused on digitalisation and IT security improvements. The scheme provides yearly grants between EUR 500 and EUR 10 000 (one round per year) to eligible very small enterprises (VSEs) and SMEs in specific sectors that hire external consultants to increase their level of digitalisation. The budget granted between Q2 2022 and Q1 2023 totalled EUR 1 749 885, and the programme started in Q2 2019 (see new Measure 65 in Belgium's Digital Decade Roadmap).

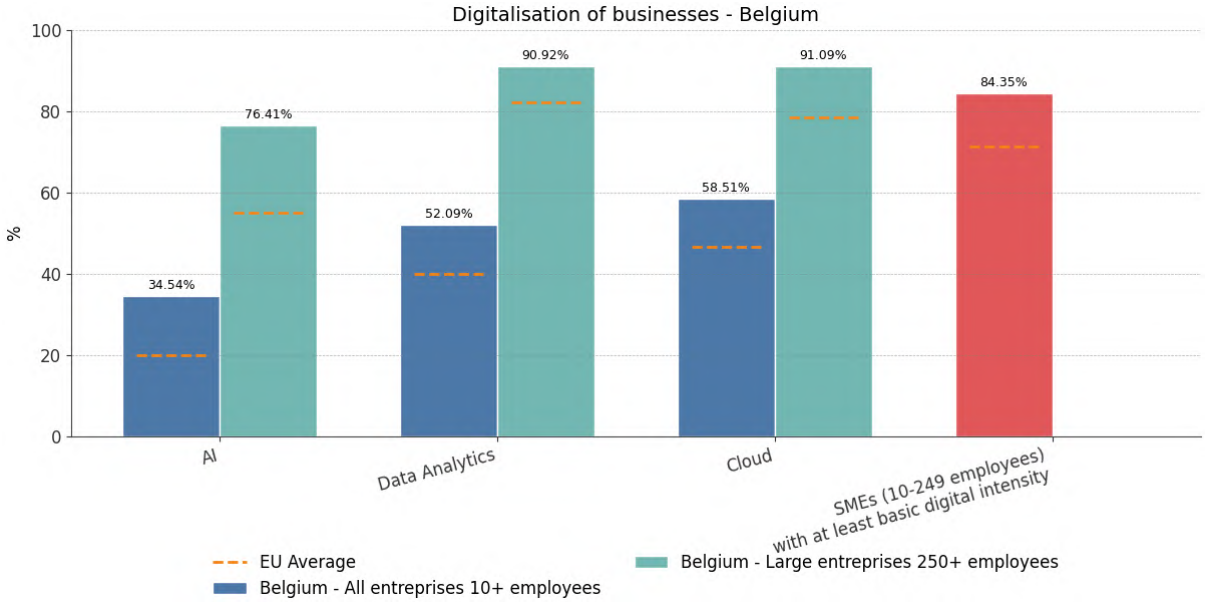
In the **German-speaking Community**, the 'Digital Strategy for Ostbelgien – digital transformation of businesses' frames actions under the 'economic position' priority. These actions include deepening partnerships and cooperation in the Euregio, Belgium and the EU, establishing centres of excellence for digital transformation, promoting internal digital strategies within firms, advising companies on financial opportunities and resources for digital transformation, supporting the creation of open data systems, promoting secure data ecosystems in companies, and advancing the qualification of employees with regard to data. Implementation is planned to take place in the period to 2030 (new Measure 63). Operational support is reinforced through the Interreg Euregio Meuse-Rhine (EMR) project 'DigiMach', which addresses fragmented digitisation in manufacturing and production industries by making modern digital technologies and training accessible to SMEs. The initiative aims to help bridge the digital divide and strengthen international competitiveness. The economic development agency acts as a network partner connecting firms, promoting the exchange of knowledge and experience, strengthening business relationships, increasing visibility and supporting participation in events. The project has a total budget of around EUR 3.6 million, including around EUR 150 000 for the economic development agency, and runs until the end of August 2028 (new Measure 70). The agency also cooperates with Agence du Numérique/Digital Wallonia, digitalHUB Aachen and the Rhineland EDIH to make their resources and expertise accessible to companies in Ostbelgien. Activities include excursions, awareness-raising and information measures, seminars and lectures, business support and advisory services provided by Digital Wallonia business developers, and the provision of tools such as DigiScore in German. These initiatives are planned to run until 2030 (new Measure 71).

Overall, Belgium's strong baseline in SME digitalisation suggests that future progress will depend less on basic adoption and increasingly on the diffusion of advanced technologies and productivity-enhancing digital applications across the broader SME base. Particular challenges relate to supporting smaller firms in moving from experimentation to operational deployment of AI, cloud and data technologies, ensuring access to advisory services, skills, computing resources and finance, and promoting wider diffusion beyond leading firms and sectors.

Belgium

Take-up of advanced technologies

Performance assessment



In Belgium 52.09% of enterprises have adopted data analytics. This is increase of 8.2% annually between 2023 and 2025 and it is above the EU average of 39.85%. For SMEs, the figure in Belgium is 50.62%, also above the EU average of 38.59%, while for large enterprises it is 90.92%, above the EU average of 82.03%. The country is on track according to the trajectory presented in its Digital Decade national roadmap.

In Belgium 58.51% of enterprises have adopted cloud technologies; this is an annual increase of 10.8% and is above the EU average of 46.69%. This is one of the areas where Belgium's growth rate also exceeds the EU's 9.5%. For SMEs, Belgium stands at 57.28%, and for large enterprises 91.09%, both above EU averages. The country is nevertheless lagging behind its national trajectory.

In Belgium 34.54% of enterprises have adopted AI; this is an annual increase of 39.8% and is well above the EU average of 19.95%. Among SMEs, AI adoption is at 32.97%, compared with 18.90% in the EU, while in large enterprises it is 76.41%, compared with 55.03% in the EU. The country is on track according to its national trajectory.

In Belgium 74.53% of enterprises use AI, cloud or data analytics; this is an annual increase of 7.7%, is above the EU average of 63.20% and is very close to the Digital Decade target of 75%. Belgium consistently outperforms the EU average across all measured business digitalisation KPIs, although EU growth rates are often faster in AI and data analytics.

According to the 2026 Digital Decade Eurobarometer, 80% of Belgian respondents believe that the development of AI should be carefully regulated to ensure safety, even if this means that AI developers face some constraints. In addition, 66% of respondents agree that AI should improve the EU's competitiveness in the world.

Policy context and assessment of recommendations

Belgium's digitalisation performance among businesses is strong, with SMEs and large enterprises alike showing higher levels of digital technology adoption compared with their EU peers. There is

continued robust progress in the uptake of digital technologies by Belgian businesses, with particularly strong acceleration in the adoption of advanced technologies. To maintain and expand this lead, Belgium would benefit from accelerating growth in the adoption of certain advanced technologies, particularly AI and data analytics. Policies supporting faster diffusion of these technologies, including among SMEs, could help sustain Belgium's leadership position in an increasingly competitive digital economy. Targeted measures encouraging adoption in sectors or firms where growth is slower – including large enterprises where adoption is already high but expansion has slowed – could further strengthen Belgium's digital transformation.

Belgium's strong performance is supported by world-class research and testing facilities, intense collaboration between academia and industry, high broadband availability, and a tradition of early technology adoption. Programmes supporting experimentation, technology transfer and scale-up are widespread, including Imec acceleration initiatives and multiple regional innovation funding instruments.

Belgian companies have embraced AI faster than the EU average and increasingly integrate it into their operations. However, recent evidence suggests that the degree of deployment and integration varies considerably across firms and sectors. Ensuring that early adoption translates into wider operational use, productivity gains and business transformation will therefore remain important for maximising the economic benefits of AI. **At the same time, differences between firm size classes remain visible.** As in many Member States, large enterprises adopt faster and deeper, while a part of the SME population remains at intermediate maturity levels. Authorities also highlight that access to financing for larger investment rounds remains a constraint in Belgium's innovation ecosystem, and may limit the capacity of firms to scale advanced digital technologies or develop larger technology projects compared with larger EU economies. Belgium's multi-level governance structure, with important responsibilities at regional level for AI-related policies, makes coordination across initiatives particularly important to ensure overall consistency, visibility and effective scaling.

Belgium has continued to reinforce framework conditions for AI diffusion through awareness, guidance and ecosystem mobilisation. It should be noted that these efforts have involved actors across Belgium's multi-level governance system, including federal and regional authorities, research centres, innovation agencies and European Digital Innovation Hubs. **Federal authorities** supported enterprises via practical information tools, SME-oriented guidance and coordination with innovation intermediaries. Belgium also carried out preparatory work for the implementation of the AI Act, in particular through a dedicated study on regulatory sandboxes that analysed governance options and practical models to facilitate SME participation. In parallel, targeted communication campaigns were launched to help enterprises understand compliance requirements and reduce uncertainty related to AI deployment. While Belgium performs strongly in AI adoption, further efforts to scale deployment in strategic sectors such as manufacturing, health, chemicals and agriculture, and to strengthen integration into the broader European AI ecosystem, including through EDIHs and shared infrastructure, could help sustain this momentum. The SME Plan adopted in January 2026 complements these efforts through measures including support for compliance with the AI Act and the establishment of AI regulatory sandboxes.

At regional level, **Wallonia** is strengthening advanced digital capacity through the Walloon Recovery Plan's investments. Programme 40 aims to set up new state-of-the-art infrastructures and platforms of excellence, including a strand focused on developing high-level digital skills via the structuring of a network of supercomputers across universities and research centres and developing the skills of staff managing the supercomputers; the budget is EUR 6.97 million plus EUR 1.68 million, with the

timeframe indicated to be 2026 (see new Measure 52 in Belgium's Digital Decade Roadmap). Wallonia's 5G Proofs of Concept calls also contribute by testing advanced 5G use cases in realistic settings and evaluating feasibility and impact across multiple dimensions (new Measure 84).

2025 recommendations on the adoption of advanced technologies: **Cloud:** Expand efforts to advance cloud infrastructure and promote cloud adoption among SMEs through broader national coordination across all regions and more concrete actions. **Artificial intelligence:** Continue to support innovation in AI to reinforce leadership in the sector and create future global leader companies.
In 2025, Belgium made some effort to address the recommendations through new policy actions. Implementation remained differentiated: the AI-related component was addressed more strongly, while progress on coordination and visibility of support for cloud and broader SME digitalisation was more limited. Belgium continues to perform strongly overall, but fragmentation across governance levels reduces the visibility and consistency of support schemes, and smaller firms still face difficulties in moving from experimentation to operational deployment of advanced digital technologies. Overall, implementation was substantial but incomplete. Further opportunities may arise from strengthening AI infrastructure, supporting sector-specific use cases and reinforcing links with European initiatives and innovation support structures, including EDIHs.

Unicorns, scale-ups and start-ups

Performance assessment

At the beginning of 2026, Belgium was home to 8 unicorns, which is 1 more than in 2025, reflecting a stable start-up ecosystem. The country did not provide a national trajectory point for 2025 in the Digital Decade national roadmap but aims to have 14 unicorns by 2030.

Policy context and assessment of recommendations

Belgium hosts a dynamic innovation environment supported by strong research capacity, international openness and public-private cooperation. Initiatives such as Imec's incubation and investment activities, regional scale-up programmes and EU funding coordination mechanisms contribute to a fertile environment for entrepreneurship. Imec.istart is a leading European early-stage tech accelerator supporting high-potential and deep-tech start-ups. Established in 2011 as part of a covenant between the Flemish government and Imec, it offers pre-seed funding and tailored support (coaching, technology, talent and market access), backed by an annual EUR 4.5 million coaching budget. To date, it has supported over 370 start-ups and scale-ups, which have raised more than EUR 1.2 billion in follow-on funding, and selects at least 20 start-ups each year for its 12-month programme in Belgium.

Belgium's innovation ecosystem also benefits from strong public-private research collaboration and regional innovation support instruments, including funding schemes and support mechanisms operated by regional innovation agencies such as VLAIO (Flanders), Innoviris (Brussels-Capital Region) and SPW Research (Wallonia), which provide financial incentives and support programmes for innovative companies and research spin-offs. A recent example illustrating this ecosystem strength is the emergence of a new unicorn, Aikido Security. The Ghent-based cybersecurity company reached

unicorn status in January 2026, highlighting Belgium's strong position in deep-tech and cybersecurity-related innovation. It also demonstrates the capacity of Belgian start-ups to scale globally from established local innovation hubs. Aikido featured among VivaTech's Top 100 Rising European Startups in March 2026.

More broadly, new initiatives aimed at strengthening ecosystem clustering and fostering collaboration between start-ups, investors and corporates are emerging beyond established hubs such as Ghent and Leuven, although their impact remains to be assessed.

Public-private partnerships and collaborative innovation structures further support the development of start-ups and scale-ups. Belgian companies actively participate in European innovation and digital programmes, including Horizon Europe, the Digital Europe Programme and EDIHs; these provide access to expertise, testing infrastructure, training and financing opportunities. In addition, regional initiatives such as the sustAIn.brussels EDIH, based in the Brussels-Capital Region, support companies in testing and deploying advanced technologies, accessing finance and strengthening digital skills. The hub operates as a one-stop shop accompanying companies along the digital innovation journey, from experimentation to scaling. Nevertheless, as in many European ecosystems, late-stage financing and global scaling remain challenges, which may affect the capacity to translate technological excellence into global leadership.

Barriers to scaling highlighted by stakeholders include the limited availability of large venture capital rounds compared with larger European markets, as well as structural challenges related to Europe's fragmented regulatory and market environment, which can make scaling across jurisdictions more complex for start-ups.

Recent policy initiatives aim to improve the broader business environment for innovative firms. In particular, the federal SME Plan introduced in 2026 includes measures to facilitate business digitalisation, improve access to finance and support the development of innovative companies, including actions to simplify regulatory procedures and encourage digital investments.

Relevant survey evidence from the European Investment Bank Investment Survey confirms Belgium's strong investment dynamics and high share of investment directed towards intangible assets such as R&D, software and organisational innovation. At the same time, firms increasingly report labour and skills shortages as constraints on further investment and expansion.

Strengthening Cybersecurity & Resilience

Belgium benefits from a strong cybersecurity framework, combining well-established institutional structures with high levels of implementation across businesses. The Centre for Cybersecurity Belgium (CCB) coordinates national policy, oversees the implementation of EU legislation and supports incident response, threat intelligence sharing, awareness and resilience-building across public administrations, enterprises and critical sectors. Among many other benefits, these initiatives contribute to the continuity and trustworthiness of digital public services.

In Flanders, the Vlaams Centrum voor Digitale Veiligheid (VCDV) supports the Flemish and local governments in strengthening their cyber resilience through support programmes, cybersecurity tools, training and ISO-as-a-service support. It also monitors the threat landscape, provides threat and

vulnerability intelligence, and delivers operational assistance ("boots on the ground") in the event of cyber incidents.

Belgium performs strongly on cybersecurity uptake. In 2024, 71.54% of Belgian enterprises implemented at least five cybersecurity measures (out of 11 measured by Eurostat), well above the EU average of 56.85%. The country also outperforms the EU across specific practices, including biometric authentication (23.15% vs 18.27%), ICT risk assessment (50.87% vs 34.10%) and ICT security testing (48.88% vs 34.64%). However, gaps remain among less mature SMEs and in certain sectors.

The threat landscape broadly mirrors EU trends. Ransomware, phishing and credential compromise remain the main attack vectors. In 2025, the CCB handled 635 incidents and carried out 103 emergency interventions, highlighting sustained operational pressures. Public administration, healthcare and manufacturing were the most affected sectors. Belgium has also faced repeated DDoS campaigns linked to geopolitical tensions, often attributed to pro-Russian hacktivist groups targeting government services and businesses following political positions related to the war in Ukraine.

Public administrations at both national and regional level face particularly acute cybersecurity exposure. Cyber incidents affecting public authorities can have far-reaching consequences, disrupting essential public services, undermining trust in institutions, and weakening crisis coordination capacities. These vulnerabilities are further compounded by the persistence of legacy systems, long infrastructure replacement cycles, and the high visibility and critical nature of citizen-facing digital services.

Belgium has made significant progress in implementing EU cybersecurity legislation. In 2025, the country moved from transposition to operational implementation of the NIS2 Directive. A national registration system has been established, with 7 825 organisations registered on the Safeonweb platform, including 1 574 essential and 2 617 important entities. Incident reporting and supervisory coordination mechanisms have been strengthened, improving visibility and response capacity across the ecosystem.

Supervision is founded on a risk-based approach using the national CyberFundamentals (CyFun®) Framework, updated in 2025 to align with NIS2 and international standards such as the NIST Cybersecurity Framework 2.0. The framework establishes three maturity levels – Basic, Important and Essential – enabling proportionate requirements and the gradual strengthening of cybersecurity practices. Its adoption by other countries, including Ireland and Romania, reflects its broader relevance.

Belgium is also active at EU level. It leads the NIS Cooperation Group working stream on supervision and promotes participation in EU funding programmes through its National Coordination Centre (NCC-BE). In 2025, Belgium ranked among the top participants in Digital Europe Programme (DEPLOY Cyber) calls, reflecting strong engagement by its cybersecurity ecosystem.

Beyond regulation, awareness and outreach activities have expanded significantly. The Connect and Share initiative reached over 13 000 participants across 15 events in 2025, focusing on practical guidance and NIS2 implementation. Public engagement remains high: nearly 10 million suspicious messages were reported via Safeonweb, leading to the identification of more than 176 000 malicious URLs. The Belgian Anti-Phishing Shield warning page recorded over 185 million visits, underlining the role of public participation in strengthening resilience.

Belgium

Within the framework of the cybersecurity policy agenda, Flanders has been strongly committed since 2019 to raising awareness, mobilising and supporting enterprises in strengthening their cybersecurity policies through a broad mix of measures. To this end, VLAIO works closely with both private service providers and sector organisations, federations and other intermediary actors with extensive outreach to businesses.

Cybersecurity is also integrated into broader digitalisation initiatives. For example, the Brussels SME consultancy grant supports IT security improvements (see new Measure 65 in Belgium's Digital Decade Roadmap), while the German-speaking Community includes network security measures in school digitalisation (new Measure 86) and provides cybersecurity workshops for youth (new Measure 36). With 'My Citizen Profile', Flanders makes information the government holds about its citizens accessible in a simple and highly secure way.

Despite these strengths, structural challenges persist. Cybersecurity skills shortages remain significant, particularly for specialised profiles such as Security Operations Center (SOC) analysts, incident responders and Operational Technology/Industrial Control Systems (OT/ICS) cybersecurity experts. In parallel, systemic risks linked to cloud concentration, supply-chain dependencies and AI-enabled cyber threats are becoming increasingly prominent. Local and federated authorities are frequently targeted by cyberattacks and continue to face significant cybersecurity challenges, notably because many of the services and activities they manage fall within high- or very high-risk categories.

People's perceptions reflected in the 2026 Digital Decade Eurobarometer show that 93% of Belgians consider protecting privacy and security online important, and 93% support reinforcing cybersecurity and protection from online threats.

2025 recommendation on cybersecurity: Continue efforts in cybersecurity to address evolving threats, particularly maintaining vigilance for enterprises and administration.
In 2025, Belgium addressed fully the recommendation by putting significant policy actions into place. The country advanced the operational implementation of NIS2, strengthened supervision and incident reporting, updated the CyberFundamentals framework, and expanded awareness and ecosystem engagement. However, challenges persist, notably uneven cybersecurity maturity among some SMEs and sectors, shortages of specialised cybersecurity professionals, and the need to further strengthen preparedness for evolving and systemic cyber threats, including those enabled by emerging technologies such as artificial intelligence. Particular attention should continue to be given to public administrations, where the critical nature of services, the persistence of legacy environments, and heightened exposure to geopolitically motivated disruption create acute cybersecurity and resilience challenges.

Protecting and empowering EU people and society

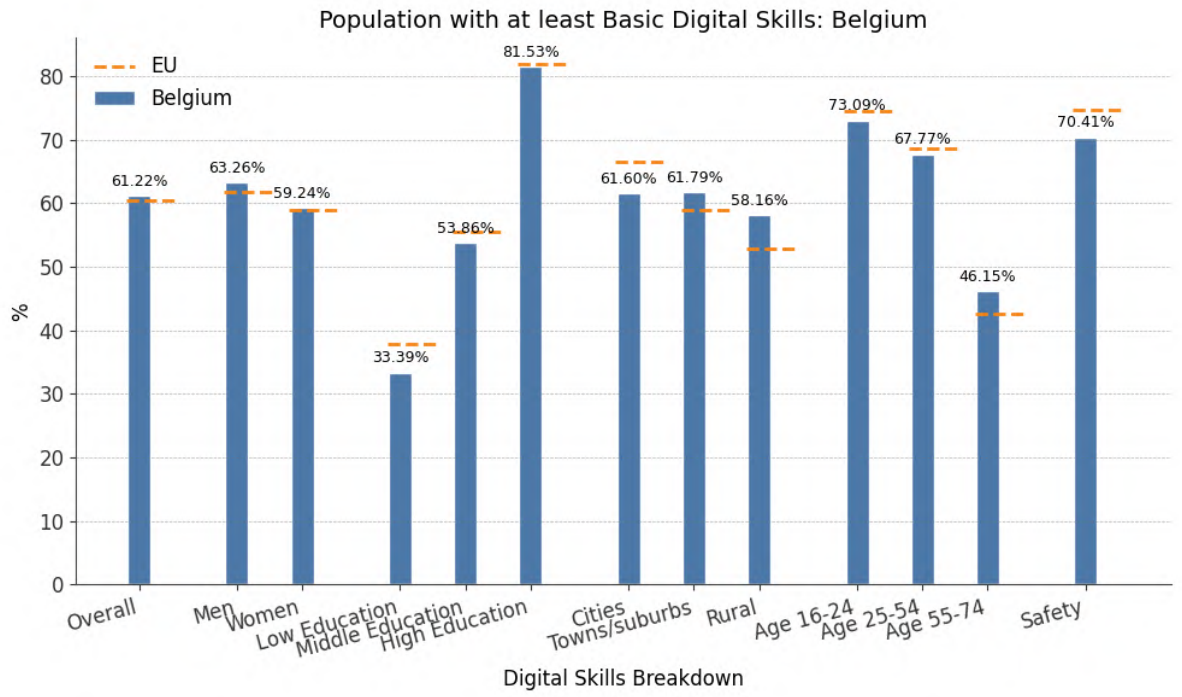
Empowering people and bringing the digital transformation closer to their needs

Equipping people with digital skills

Basic digital skills

Performance assessment

Belgium performs slightly above the EU average in basic digital skills, but progress remains slow and uneven across population groups. Structural gaps persist in advanced skills, gender balance and education levels, despite high levels of connectivity and digital use.



In Belgium 61.22% of individuals aged 16-74 have at least basic digital skills; this is an increase of 1.5% annually since 2023, slightly above the EU average of 60.40%. However, Belgium's growth rate is significantly below the EU's 4.3%, and the country is lagging behind the trajectory presented in its Digital Decade national roadmap. Above-basic digital skills remain below the EU average, at 29.69% compared with 31.43%.

Belgium exhibits a gender gap of 4.02 percentage points in favour of men, a larger gap than the EU average of 2.75 percentage points. Education level remains a major determinant: only 33.39% of individuals with no or low formal education have at least basic digital skills, below the EU average of 37.56% for this group. Rural areas perform relatively well, at 58.16%, above the EU average of 52.83%.

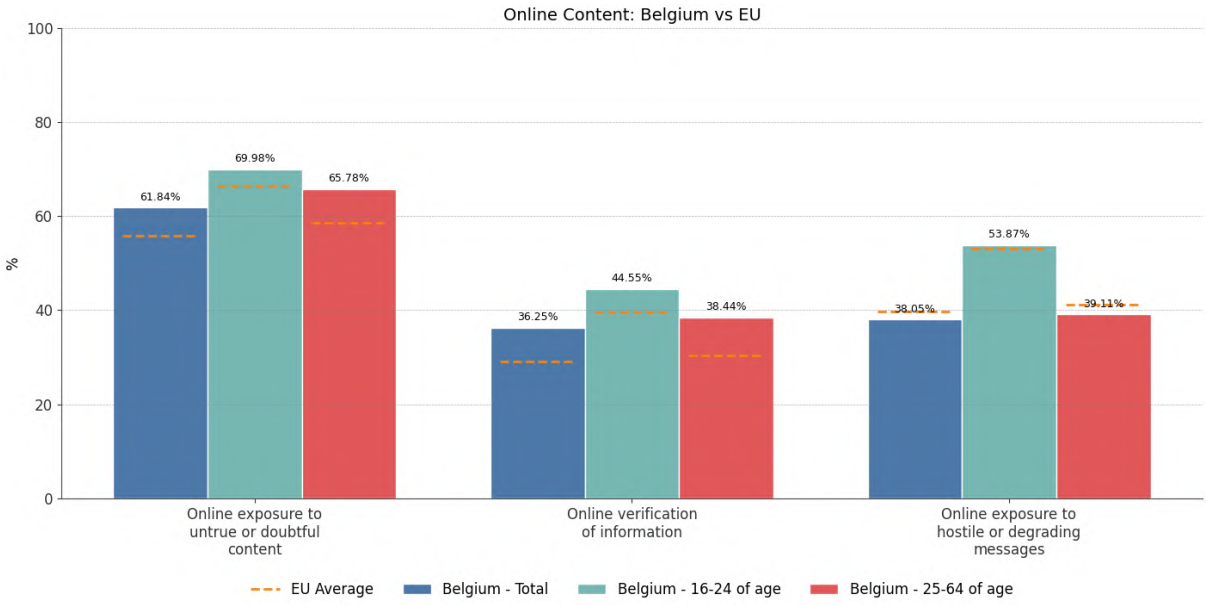
Young adults aged 16 to 24 in Belgium have a digital skills rate of 73.09%, slightly below the EU average of 74.55%, while in the 55-74 age group the figure is 46.15%, above the EU average of 42.60%. Digital safety skills remain weaker, with 70.41% of individuals having at least basic safety skills, below the EU average of 74.63%.

Generative AI uptake is widespread: 42.01% of Belgians used generative AI in 2025, above the EU average of 32.66%, and 20.82% used it for professional purposes, compared with 15.36% in the EU. **According to the 2026 Digital Decade Eurobarometer**, the main obstacles to the use of generative AI tools among Belgian users are concerns about accuracy or incorrect information (40%), concerns about privacy or data protection (37%) and concerns about ethical issues or misuse of generative AI tools (33%).

Online content behaviour and information resilience

Complementary indicators on online exposure to untrue or doubtful content, to hostile or degrading messages, and to online verification of information, highlight mixed trends in information resilience and media literacy. Belgium records higher exposure to untrue or doubtful content than the EU average, while exposure to hostile or degrading messages remains slightly lower, despite faster growth. At the same time, levels of online verification of information are comparatively high. Age differences persist across indicators.

In 2025, 61.84% of individuals in Belgium reported exposure to untrue or doubtful content online, above the EU average of 55.90%. Younger people remain more exposed than older groups, although the age gap is smaller than at EU level. Verification behaviour is comparatively strong: 36.25% of individuals verify online content, above the EU average of 29.16%, with younger users more likely to do so. Exposure to hostile or degrading messages was at 38.05%, slightly below the EU average of 39.72%, but it increased faster than at EU level.



Based on the results of the 2026 Digital Decade Eurobarometer, a very large majority (93%) of Belgians considers that the EU should further strengthen the protection of children and young people online, and 90% agree that online manipulation poses a threat to democratic processes. The issues with the biggest personal impact are fake news and disinformation (55%), misuse of personal data (47%) and insufficient protections for minors (41%).

Belgium

Policy context and assessment of the recommendations

Belgium's approach to digital skills is characterised by very broad mobilisation across all governance levels, combining inclusion, education reform, labour-market activation and awareness actions. Belgian authorities identify **the need to increase the share of the population with at least basic digital skills** as one of the country's main challenges in achieving the 2030 Digital Decade targets. They note that progress has been gradual, but that the current pace remains insufficient to comfortably reach the 80% target by 2030. Recent national statistics confirm that around 40% of the population still lacks at least basic digital skills, illustrating the scale of the challenge.

A strong emphasis is placed on digital inclusion of vulnerable groups, in particular through large-scale initiatives such as the RRP-supported Flemish Digibanks, employment-service training offers, and regional public access points. Authorities also point to structural barriers behind the moderate performance in digital skills, including low qualification levels, socio-economic vulnerability, unequal access to equipment and connectivity for some groups, and fragmented coordination across education, training and labour-market policies. National statistics also highlight significant differences in digital skills across socio-economic groups, with students and people in employment much more likely to possess digital skills than other parts of the population.

Stakeholder input highlighted that digital vulnerability remains significant, with a large share of the population lacking sufficient digital skills or access. Consumer organisations stress that these groups are often under-represented in digital policy design and user satisfaction surveys, leading to a risk of 'invisible exclusion' from increasingly digital-first service environments.

Since the previous roadmap, several new or reinforced measures have appeared:

- In **Flanders**, the Digiplan adopted in 2025 (a successor to Digisprong) and running until 2028 (see new Measure 14 in Belgium's Digital Decade Roadmap) mobilises substantial investments to modernise digital infrastructure, strengthen teacher training and enhance digital literacy in schools, while curriculum reforms further embed ICT skills and critical digital understanding in compulsory education. There is a lack of systematic assessment of pupils' and teachers' digital skills at the national level, with only Flanders participating in the International Computer and Information Literacy Study (ICILS), which measures the digital skills of 8th-grade students, limiting the possibility of a comprehensive assessment at country level.
- The **Brussels-Capital Region** expanded digital skills assessments and inclusion programmes for jobseekers, while boosting residents' skills via free info sessions, partnerships with Digital Public Spaces, and regional inclusion measures (equipment, training). Women benefit from awareness campaigns and the Womenpreneur Tech programme.
- **Wallonia** is continuing large-scale actions under Digital Wallonia, including training pathways and public digital spaces. Every two years, the region publishes its own barometer on citizens' digital maturity, which serves as a compass to help identify priorities and guide future policy actions.
- The **Fédération Wallonie-Bruxelles** became involved in the Pix programme in 2021, with deployment beginning in 2022 across education, adult training and public administrations. The first official certifications were organised at the end of 2024 and were further extended in 2025 to higher education and adult continuing education, notably through several university colleges and training centres. The programme enables the assessment of 16 core digital competences and also contributes to the development of a digital skills observatory.

Pix has additionally been implemented through partnerships with the Service public de Wallonie (Forem) and the Brussels-Capital Region (Actiris).

- In the **German-speaking Community,** the 'Artificial intelligence in school education' initiative was launched as a cross-network expert group at the Autonomous High School. It develops practical guidelines for AI use in schools, including lesson planning, exam formats and media education standards, while integrating AI into teacher training and creating a multi-year programme to help teachers reduce workload and better support students (new Measure 39). In parallel, the workshop series 'Kreativ Geld verdienen' (*Earning money creatively*) offers 8-12 annual sessions for the cultural and creative sectors, covering social media, content creation, digital solutions and AI, with both introductory and advanced formats, funded at EUR 8 000-12 000 per year until 2030 (new Measure 54). The educational digital platform 'Teejit' also supports uptake of practical digital tools by publishing short educational videos for tourism providers and individuals, focusing on AI, social media, image editing and marketing, funded at EUR 25 400 over 24 months until 2026 (evaluation afterwards) (new Measure 38).
- **Federal actors** improve cybersecurity awareness and national coordination through dedicated skilling programmes. A significant structural development is the preparation of the interfederal Individual Learning Account, which aims to create a portable, individual-controlled record of training rights and credentials. If effectively implemented, this could become a cornerstone initiative in better matching labour-market demand, digital upskilling and mobility across regions.

Since mid-2025, additional emphasis has been placed on adult upskilling and digital training within Belgium's public administrations. Examples include new AI literacy and cybersecurity training programmes for federal civil servants, as well as the rollout of innovative learning formats in Brussels regional administrations through the 2026 Training Plan and MyTalent Learning.

Greater attention is also being paid to measurement and alignment with EU indicators. Federal coordination increasingly links inclusion, labour-market activation and SME needs, while using harmonised statistical sources to track participation, access and progression toward advanced skills. This contributes to a more consistent view of national performance, even though governance responsibilities remain decentralised.

The governance of information integrity and media literacy in Belgium reflects this broader multi-level structure. Several authorities are involved across governance levels. While the BIPT is not directly responsible for most policy measures in this area, it contributes to national coordination and knowledge-sharing, including in the context of the European Centre for Democratic Resilience. Media regulators at language-community level – the VRM, CSA and Medienrat – are involved in implementing relevant EU legislation such as the Digital Services Act, the Transparency and Targeting of Political Advertising Regulation and the European Media Freedom Act. In the French Community, the audiovisual media decree of 4 February 2021 also assigns the CSA responsibilities related to media education and the fight against disinformation.

Belgium is also preparing the renewal of its interfederal Women in Digital strategy in 2026, with continued focus on increasing the participation of girls and women in digital education, the labour market and entrepreneurship, including through monitoring based on 21 KPIs.

The policy mix is therefore rich, diversified and relatively stable across governance levels. Despite the breadth of action, three structural issues persist. First, Belgium struggles to convert high connectivity and widespread basic use into higher-level competencies. Second, the system remains fragmented, with many initiatives operating successfully at regional or community level but without an integrated national steering mechanism. Third, demographic pressure (ageing population and strong labour demand for digital profiles) requires faster upskilling of adults already in the workforce. Age differences remain particularly pronounced: while young people spend significantly more time online and are more exposed to digital environments, older groups display much lower levels of digital use and competence.

Relevant, recent evidence from Belgium's statistical office Statbel confirms both the deep integration of digital technologies into daily life and the persistence of important skills gaps. In 2025, Belgians spent on average 3.7 hours per day online, with significant variation across age groups: young people aged 16-24 spend more than 5 hours per day online on average, while individuals aged 75-89 spend only slightly more than one hour. The share of individuals with basic digital skills increased from 54% in 2021 to 61% in 2025, marking steady progress but remaining insufficient to meet the Digital Decade objective of 80% by 2030. Overall, the findings underline that while digital tools are widely present in everyday life, access to connectivity and devices does not automatically translate into adequate levels of digital competence.

2025 recommendation on Basic digital skills: Address the gender gap in digital skills, provide support for the less educated, assist older adults in becoming digitally savvy, and improve online safety skills to ensure comprehensive digital inclusion.
In 2025, Belgium made some efforts to address the recommendation through new policy actions. The country maintained and reinforced a broad range of measures targeting digital inclusion, education and adult upskilling. However, improvements in outcomes remain gradual. Progress in basic digital skills is slower than the EU average and remains insufficient to meet the 2030 target at the current pace. Structural disparities persist for low-qualified people, older adults and women, while digital safety skills remain below the EU average. Despite a broad policy mix, fragmentation across governance levels continues to limit coherent steering and outcome-based monitoring.

ICT specialists

Performance assessment

In Belgium is at **5.9% of the total of those in employment are ICT specialists;** this constitutes an increase of **3.5% in 2025** and stands above the EU average of **5.0%**. The level and rate of increase are above the EU average. However, the country is lagging behind the trajectory presented in its Digital Decade national roadmap.

The share of women ICT specialists in Belgium has decreased. In terms of women ICT specialists, Belgium is below the EU average, with **17.60% in 2025**, compared to the EU's **19.50%**.

In 2024, Belgium was among the Member States with the lowest share of ICT graduates, at **3.4% of all graduates (vs 3.0% in 2023)**. This low performance is concerning as a low share of ICT graduates

worsens the prospects for bridging the gap in the training of more ICT specialists for the future workforce.

In 2024, 14.50% of Belgian enterprises recruited or tried to recruit personnel with ICT specialist skills (EU average: 9.55%). Moreover, 9.07% of enterprises declared they had hard-to-fill vacancies for jobs requiring ICT specialist skills (EU average: 5.49%).

Policy context and assessment of the recommendations

Belgium continues to face challenges related to the supply of ICT specialists. These include a relatively low share of ICT graduates, persistent gender imbalances and shortages in certain advanced profiles, including AI, cloud, data and cybersecurity. These factors may contribute to labour-market pressures and skills mismatches reported by businesses.

Belgium benefits from strong higher education and research institutions, internationally recognised R&D centres, and close collaboration between academia and industry. Authorities nevertheless stress that Belgium's moderate performance as regards the number of ICT specialists reflects structural factors: relatively low attractiveness of STEM and ICT studies, persistent gender stereotypes, mismatch between education output and labour-market demand, and fragmented responsibilities across governance levels.

The latest roadmap confirms continuity of measures supporting STEM orientation, reskilling and attracting talent. Several initiatives specifically target women and under-represented groups, including dedicated diversity plans and awareness campaigns.

AI and cybersecurity skills are receiving increasing prominence, reflecting labour-market demand and strategic autonomy considerations. The most acute shortages concern advanced developer profiles, cybersecurity experts, data engineers, cloud specialists and other highly specialised digital roles, while labour-market demand is rising faster than the supply of trained specialists.

Belgium has not yet translated its extensive set of initiatives into quantified objectives directly aligned with Digital Decade indicators. In particular, systematic tracking of the ICT specialist pipeline and anticipation of AI and cybersecurity workforce needs remain under development. Without stronger outcome-based steering, the risk persists that efforts remain substantial but insufficient to close the gap toward 2030.

Implementation is largely driven at regional level. Flanders has introduced a major education-driven package. The Digiplan (2025-2028) (see new Measure 14 in Belgium's Digital Decade Roadmap) focuses on strengthening digital skills and teaching quality through digitalisation, including digital literacy, media awareness and responsible technology use, while supporting teachers through professional development and ensuring access to digital infrastructure, backed by EUR 325 million. Complementary curriculum reform sets minimum ICT skills across compulsory education, covering digital systems, computational thinking, media literacy (privacy, misinformation), collaboration, digital identity and the societal impacts of technologies, including AI (new Measure 15). In parallel, Flanders is preparing a transversal digital skills action plan aligned with Digital Decade priorities, addressing education, labour market and vulnerable groups (new Measure 40).

The **Brussels-Capital Region** is focusing on employability and inclusion. Actiris implements a digital skills assessment initiative for jobseekers, including those lacking basic prerequisites, with budgets of EUR 2 million in 2023 and EUR 4 million annually for 2024-2026 (new Measure 18). The 'Brussels Youth To Digital' (BYTD) project promotes uptake of public digital tools and services among young people

through awareness, events and user journey mapping (new Measure 21). Bruxelles Formation complements this with a broad ICT training offer (3 637 places in 2025) and targeted analysis of key IT professions to better align training with labour-market demand.

Wallonia is combining inclusion and workforce upskilling. The DigiStart programme provides DigComp-based basic digital training for people not in employment, with funding of EUR 1.7 million from 2026 (new Measure 31). The Digital Inclusion Plan aims to address access, usage and skills divides (new Measure 32). For workers, a DigComp-aligned strategy (Walloon Recovery Plan's project 231) supports skills development and training matching (new Measure 34), while the Lifelong Digital Training Programme (Walloon Recovery Plan's project 33) establishes digital factories, certification pathways and online learning modules, supported by EUR 39.2 million (new Measure 35). A coordinated plan to promote STEAM careers addresses skills shortages and gender stereotypes through awareness campaigns and project calls, funded at EUR 16.345 million in the period to 2026 (new Measure 50).

In the **German-speaking Community**, youth work and lifelong learning support digital skills and media literacy. Initiatives include digital youth work, school-based workshops on cybersecurity and disinformation, and awareness actions under the Youth Council mandate (2025-2027) (new Measure 36). The Digital Strategy for Ostbelgien promotes lifelong digital learning, teacher training and future skills (new Measure 37), complemented by initiatives such as Teejit, AI in education and cultural/creative-sector workshops (new Measures 38, 39, 54). The school IT reform strengthens the enabling environment through upgraded infrastructure, centrally managed devices and digital administration systems (new Measure 86).

2025 recommendation on ICT specialists: Sustain efforts to boost the number of female ICT specialists and female ICT graduates.
In 2025, Belgium made some efforts to address the recommendation through new policy actions. The country continues to support ICT skills development through education and training measures, and targeted initiatives to increase women's participation. However, available data indicate that gender imbalances persist and have recently widened, and labour shortages remain, with enterprises continuing to report recruitment difficulties and a relatively high share of hard-to-fill ICT vacancies. The pipeline of ICT specialists remains insufficient to meet growing demand, particularly for advanced profiles in AI, cloud, data and cybersecurity. At the same time, the low share of ICT graduates continues to weigh on future supply. Stronger outcome-based steering is still needed to better align education, reskilling and talent-attraction efforts with labour-market needs.

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

Performance assessment

Belgium performs strongly in digital public services, particularly for businesses, while services for citizens remain below EU levels and more uneven across life events and governance levels. Differences across government tiers persist, with central administrations performing relatively weaker, although overall trends point to gradual improvement.

In 2025, Belgium's total digital public services score for citizens was 81.60/100 points, a 0.2% increase compared to 2024, but below the EU average of 84.64/100. The country is lagging behind the trajectory presented in its Digital Decade national roadmap. For national citizens, Belgium reached 93.35/100, slightly below the EU average of 94.01/100, while cross-border digital public services for citizens reached 69.86/100, below the EU average of 75.28/100 and decreasing compared with 2024.

Citizen-related life events that score particularly well include Career (94.20), Starting a small claims procedure (91.67), and Studying (88.12). Conversely, Family (52.05), Health (77.60), and Moving (80.00) show the most room for improvement. **Across levels of government for national citizens' digital public services,** central government services scored 86.36/100, regional services 89.40/100, and local services 86.62/100.

Belgium's total digital public services score for businesses reached 95.97/100 in 2025, above the EU average of 88.59/100 and up by 0.6% compared with 2024. The country is on track according to its national trajectory. Digital public services for national businesses reached the maximum score of 100.00/100, while cross-border business services reached 91.94/100, above the EU average of 78.37/100.

According to the 2026 Digital Decade Eurobarometer, 70% of Belgians consider that the digitalisation of daily public and private services is making their life easier.

Belgium's access to eHealth records remains at the maximum score of 100.00, well above the EU average of 86.51. The country has achieved the Digital Decade target, and is therefore on track with the trajectory presented in its Digital Decade national roadmap.

Policy context and assessment of the recommendations

In 2025, Belgium did not receive any recommendation under the Digital Decade on key digital public services and solutions.

Belgium performs strongly in digital public services, particularly for businesses, supported by a mature digital identity ecosystem and a wide range of platforms across governance levels. However, structural challenges continue to limit fully integrated, user-centric services, especially for citizens. Survey evidence confirms these challenges. Despite relatively high overall satisfaction with service delivery, both citizens and businesses report difficulties in identifying the appropriate services, highlighting the need for clearer single points of contact. Concerns related to processing times and the complexity of documentation requirements also remain significant.

Despite high uptake, fragmentation remains an issue. Responsibilities are split across federal, regional and local levels, hindering the development of seamless one-stop-shop services. As a result, a significant share of businesses report difficulties when interacting with public administration, leading to increased operational costs and delays. This is particularly visible in areas such as business permits, where the absence of a unified digital one-stop shop across governance levels results in complex, fragmented and time-consuming procedures. At the same time, digital inclusion gaps continue to limit effective access for all citizens. Federal authorities have introduced mitigating tools, including the Connectoo training and certification scheme, which had 6 722 registrations and 1 909 certified civil servants at the end of 2025.

Use of eGovernment services is high, with 87.59% of Belgian Internet users engaging with them in the past 12 months, well above the EU average (76.03%). This reflects the strength of the digital identity ecosystem and widespread use of trusted authentication tools such as eID and mobile solutions. While portal-based delivery and user-centric design are well advanced, performance gaps across life events highlight persistent integration challenges, particularly for complex, multi-actor services (Family,

Health, Moving). Although most public services are accessible through digital portals, seamless end-to-end journeys, including cross-border use, remain limited.

Belgium continued to perform strongly on most eGovernment auxiliary indicators in 2025, though trends are mixed. User support (92.86, up from 91.01) and mobile friendliness (98.35) remain above EU averages (90.01 and 97.35 respectively), despite a slight decline in mobile performance (99.17 in 2024). Pre-filled forms also exceed the EU average (80.63 vs 75.93) but declined compared to 2024 (84.33), while the EU improved. By contrast, transparency (63.07 vs EU 69.59) remains below average, with only marginal progress (from 63.00 in 2024). Overall, Belgium combines strong usability with weaker transparency and signs of stagnation in some areas.

Belgium continues to expand its digital identity ecosystem. MyGov.be, launched in May 2024, allows users to store and share official documents, access eBox messages, and initiate procedures via Loket. Since October 2025, it has supported logging in to public services (alongside eID and Itsme) and digital signatures (see new Measure 128 in Belgium's Digital Decade Roadmap). It is expected to become eIDAS 2.0 compliant by the end of 2026 and to integrate further functionalities, including attribute certificates. Complementary initiatives, such as Brussels Youth To Digital (new Measure 21), promote uptake among younger users.

Adoption is growing: by the end of 2025, MyGov.be had 528 122 users, including 464 236 new activations in 2025. The wider ecosystem is also expanding, with eBox reaching 4 260 010 users, 837 sending organisations, and an average of 7.8 million messages per month.

At regional level, initiatives are reinforcing portal-based delivery. In Flanders, the 'Municipality Hall of the Future' programme (EUR 3.5 million, 2025-2030) supports local digital transformation through coordinated project portfolios and shared architecture (new Measure 94). The 'Digital Assistant in Flanders', supported by EUR 2.5 million annually since 2025 (new Measure 113), will be available at four core portals that promote a unified user experience with single sign-in; in particular the 'My Citizen Profile' portal (and app) enables citizens to access services (certificates, permits, subsidies) through a single digital counter.

In Brussels, the Regional Web Strategy (EUR 12 million to 2026) strengthens user-centric governance through a Digital Competence Centre and improved service design (new Measure 45). Complementary initiatives include one-stop-shop solutions (MyBEE), digital permitting (MyPermit), IRISbox expansion, and implementation of the once-only principle via shared registers such as 'Best Address'.

Wallonia is actively engaged in administrative simplification efforts aimed at reducing the administrative burden for citizens and businesses. The Pact for Administrative Simplification, led by the Minister for Administrative Simplification, is built around four guiding principles: a user-centric approach, the digitalisation of procedures while maintaining physical service desks, the principle of trust — whereby administrations rely on users' declarations and avoid systematic checks — and the 'Only Once' principle, under which users should only need to provide data a single time. In this context, 'Mon Espace' serves as Wallonia's digital one-stop shop, enabling citizens and businesses to complete administrative procedures online and monitor their progress. The platform is progressively evolving towards more user-centric services, with recent advances including the digitalisation of environmental permits (new Measure 112) and the planned online availability of public planning permits from June 2026. The full digitalisation of the single permit process remains ongoing and is expected to be completed by the end of 2026.

Supporting these objectives, **ongoing initiatives across the regions** seek to strengthen the operational implementation of data sharing and reuse between public administrations. This includes efforts to structure authoritative data sources, improve interoperability frameworks, and facilitate the secure exchange and reuse of data in line with the 'Only Once' principle.

The **German-speaking Community** is implementing targeted eGovernment projects. These include the legal and technical rollout of the once-only principle (new Measure 114); a centralised service portal under the Digital Strategy for Ostbelgien (new Measure 115); and sector-specific applications such as digital construction files (EUR 135 000, new Measure 116), tourist accommodation registration (EUR 128 000, new Measure 117), and the 'Meine Kinderbetreuung' portal, a childcare platform (EUR 1.5 million development + EUR 32 000 annual costs, new Measure 123). Additional measures include ICT infrastructure for care centres (EUR 715 000, new Measure 88).

Belgium continues to strengthen interoperability of its online public services through several key initiatives: the Federal Action Plan for Administrative Simplification (2025-2029), the Federal Service Integrator, the Federated API Marketplace, and the rollout of the once-only principle across regions. These initiatives aim to improve coordination, interoperability and data-sharing across public administrations, though their impact on user-facing integration remains limited. The challenge is increasingly to translate technical interoperability into operational, end-to-end services supported by stronger governance coordination. The new plan, adopted in December 2025, specifically aims at reducing administrative burden and improving service delivery. It builds on the Kafka Plan and was developed through a broad consultation process that generated over 580 proposals, 78 of which were selected. The Federated API Marketplace, launched in 2025, acts as a supporting tool which lists 198 APIs (as of September 2025), with around 465 monthly visits and a budget of EUR 736 423.69 (new Measure 118). The Federal Service Integrator handled over 2.8 billion messages in 2025 across 31 authentic sources, with 296 services available to public partners.

Belgium has achieved full maturity on the 2030 eHealth target composite score on universal citizen access to electronic health records. Belgium has ongoing projects to optimise digital support for high-quality, continuous healthcare provision and citizen empowerment, such as the Belgian Integrated Health Record. In addition, Belgium adopted in 2022 the National convergence plan for the development of artificial intelligence with an objective dedicated to AI in healthcare, and there is an eHealth Action Plan. Health is also a crucial sector recognised in the Apply AI Strategy, although AI adoption and integration in healthcare remain limited and uneven. **To date, six Belgian 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. Further, the cross-border harmonisation, secure storage, processing, and analysis of health data for high-impact use cases is supported by federated infrastructures and governance. **Belgium has appointed a representative to the Genome EDIC Working Group.**

Belgium's strong performance on the eHealth composite indicator suggests that further progress will increasingly depend on going beyond the core requirements of the methodology, in particular by addressing remaining qualitative aspects of access and usability. This includes potential gaps in how people experience access to their health data, where structured feedback mechanisms could help identify limitations and inform continuous improvement. At the same time, while strategic frameworks for artificial intelligence in healthcare are in place, the translation into concrete investment priorities and large-scale deployment remains uneven. Participation in European initiatives such as the Network of AI-powered Advanced Medical Centres points to emerging capacity, but scaling up the adoption of

AI solutions in clinical settings may require clearer prioritisation of use cases and sustained support for implementation and testing across healthcare organisations.

Belgium is advancing the digitalisation of healthcare, with high uptake of digital health services and significant investment. Progress is driven by the eHealth Action Plan (2025-2027), the Belgian Integrated Health Record, and platforms such as Masante.be. However, integration challenges persist across providers and regions. Further progress will depend on translating investments into seamless, patient-centric services, including cross-border continuity of care.

According to the 2025 edition of the European Commission's Country Health Profile for Belgium under the State of Health in the EU report, Belgium has significantly increased ICT investment in healthcare, achieving EUR 5.1 million per 100 000 head of population in 2023 – more than double the EU average. Around EUR 40 million from the RRP supports further digitalisation. Governance is structured around the eHealth Action Plan, aligned with the European Health Data Space, and supported by the Health Data Agency. A key component is the Belgian Integrated Health Record, which will provide real-time, comprehensive patient data across care settings. At the same time, the use of digital health services by individuals is growing, particularly for accessing records and booking appointments. The Masante.be portal, launched in 2018, provides centralised access to medical data, prescriptions, vaccination status and insurance information, supporting transparency and patient empowerment.

Leveraging digital transformation for smart greening

The footprint of Belgium's ICT sector has a mixed environmental profile. While Belgium exhibits strong performance in areas such as recycling and circular economy practices, this reflects a structural imbalance: policy efforts have primarily focused on digital technologies as enablers of the green transition, while the direct environmental footprint of digital infrastructures has received comparatively less policy attention.

Air emissions from the sector reached **32.6 kg CO_2 equivalent per capita in 2022**, significantly above the EU average of 22.8 kg. That same year, the sector represented **0.45% of total national air emissions**, again slightly higher than the EU benchmark (0.35%). A comparatively smaller share of emissions came from ICT manufacturing (13.9%) than the EU average (18.2%), indicating that a large part of the footprint is linked to services, networks and usage patterns.

At the same time, Belgium performs relatively well in the **recycling and preparation for reuse of electronic waste**; it recorded a figure of **78.77%** for ICT-related waste collected (corresponding to two categories of waste electrical and electronic equipment) in 2023, close to the EU average of 80.23%. This suggests that while upstream and operational emissions remain a challenge, downstream circular management practices are comparatively advanced.

Belgium has taken visible steps to strengthen the monitoring and governance of the environmental impact of digitalisation, particularly through the work of the BIPT and participation in EU-level reporting mechanisms. Authorities also note increasing public awareness of the environmental footprint of digital services, including energy and water consumption associated with data centres and AI applications, which is reinforcing the policy focus on monitoring and transparency.

At federal level, the BIPT has further developed the monitoring of the telecom sector's environmental footprint. Belgium contributes to emerging EU-level monitoring mechanisms, notably through reporting requirements under the Energy Efficiency Directive on large data centres and the forthcoming EU database and rating scheme on the energy performance of such centres. These developments are improving transparency on energy consumption, water use and heat recovery associated with digital infrastructure. They also provide more granular insights into trends in emissions, electrification, renewable sourcing and waste streams. However, methodological challenges persist, notably regarding Scope 3 emissions and the reliance on guarantees of origin. Authorities underline that important information gaps remain, particularly regarding the environmental footprint of emerging technologies such as AI systems and large-scale computing infrastructure, as well as the availability of comparable indicators on energy and water consumption across digital services.

At regional level, initiatives increasingly connect digital technologies with decarbonisation pathways. In **Flanders**, research programmes in semiconductors and AI explicitly target reductions in carbon intensity, water use and material circularity, and support applications such as smart grids and renewable energy optimisation. **Wallonia** continues to deploy the Circular Wallonia strategy, in which digital solutions are recognised as enablers across priority value chains. In the **Brussels-Capital Region**,

climate and economic transition frameworks such as PACE and the Shifting Economy strategy maintain a strong link between digital tools, resource efficiency and social objectives. Additionally, the region's Responsible Digital Strategy formalises concrete actions to reduce the environmental footprint of digital activities.

Survey evidence from the European Investment Bank Investment Survey indicates that Belgium is among the leading countries regarding the proportion of firms investing in energy efficiency and the share of investment allocated to such objectives. This underlines the growing integration of competitiveness and sustainability considerations within corporate strategies, as well as the potential for aligning digital and green investments to strengthen both environmental sustainability and long-term competitiveness. **Regarding citizens' perceptions reflected in the 2026 Digital Decade Eurobarometer**, 53% of Belgians consider green digital technologies (e.g. energy-saving technologies) among those that will have the most positive impact in the next 10 years. In addition, 82% of respondents agree that is a priority that AI should be developed in an environmentally sustainable way.

2025 recommendation on Green and digital transition: Continue to coordinate efforts and develop more structured monitoring mechanisms for emission reductions, linking environmental sustainability with digital innovation.

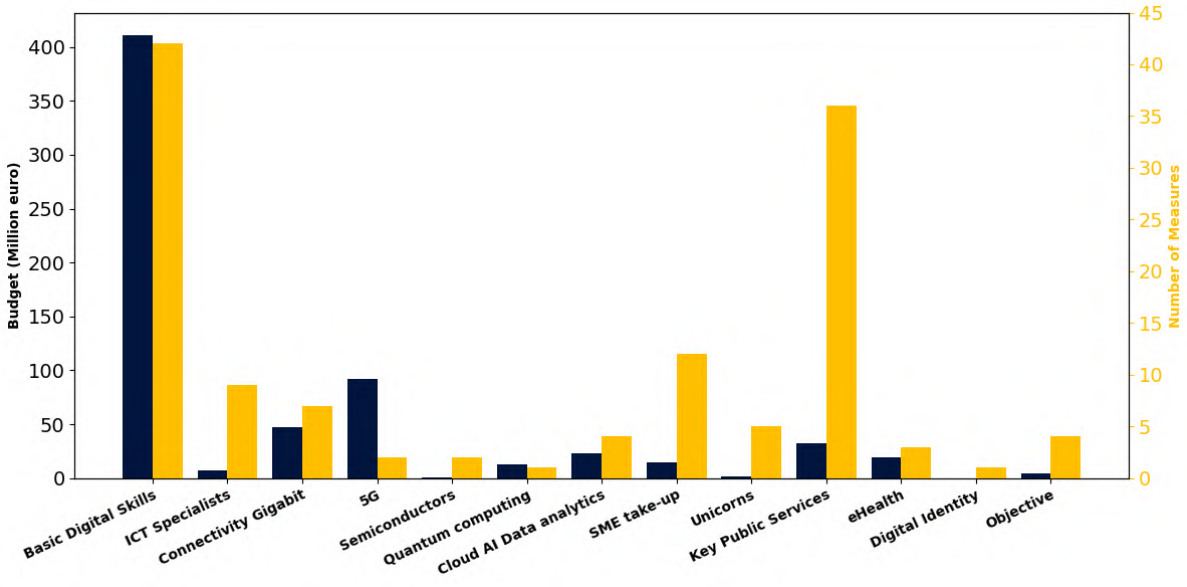
In 2025, Belgium continued the implementation of existing measures but did not take any new measures that directly address the environmental footprint of digital infrastructures. The country further improved monitoring and transparency, notably through the work of the BIPT and participation in EU-level mechanisms on data-centre energy performance. However, monitoring remains fragmented across governance levels and has not yet translated into quantified reduction targets, coordinated policy action or strategic steering for the ICT sector. Overall, Belgium strengthened its evidence base, but this has not yet resulted in measurable reduction pathways.

Annex I: National roadmap analysis

Belgium's national Digital Decade strategic roadmap

Belgium submitted a revised national Digital Decade roadmap in January 2026. The update introduces new trajectories for edge nodes, eHealth, fibre and VHCN, alongside an updated set of measures. The roadmap now includes **128 measures** (down from 166), of which 37 are new, reflecting continued policy efforts across federal and regional levels in a context of ongoing governmental transitions. These new measures focus on digital skills, business digitalisation, digital infrastructure and eGovernment. **The total budget associated to the 128 measures is EUR 664 million** (mostly coming from public budgets), corresponding to approximately 0.1% of Belgium's GDP in 2025.

Measures and budget in the national roadmap[4]



Expired measures were removed from the previous version and new initiatives introduced to address remaining gaps towards the 2030 targets and the recommendations from the 2025 State of the Digital Decade report. The roadmap remains aligned with EU priorities on AI, cybersecurity and the green digital transition, and continues to cover all Digital Decade objectives, including a human-centred digital space, resilience and security, technological sovereignty and sustainability. Reporting on stakeholder consultation has also improved.

This revision constitutes a targeted update rather than a full overhaul. Most trajectories remain unchanged, as Belgium considers itself broadly on track for 2030, while addressing specific gaps, notably in edge nodes, ICT specialists and fibre. It also reflects continued efforts to strengthen

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

coordination across governance levels and alignment with EU objectives, supported by enhanced consultation processes, including a 2025 outreach campaign led by the national digital taskforce.

The updated measures show a clearer structuring of policy efforts. Digital skills and inclusion remain the most prominent areas, with a stronger shift towards systemic interventions (e.g., curriculum reforms, AI-related training, and coordinated digital inclusion actions such as Digibanks and targeted regional programmes). In parallel, measures supporting the digital transformation of public administration and services have become more integrated, with greater focus on user experience, service delivery and interaction channels rather than standalone tools. Connectivity and infrastructure policies continue to prioritise fibre and 5G deployment, while increasingly incorporating emerging areas such as AI ecosystems, data infrastructure and advanced technologies. Overall, while core priorities remain unchanged, the 2026 update reflects a more coherent, system-oriented approach, with fewer standalone or pilot actions and greater emphasis on scalability, coordination and long-term impact.

The roadmap continues to address most recommendations from previous Digital Decade reports through a mix of existing and new measures, including initiatives in digital skills, inclusion, interoperability and data governance.

However, some limitations persist. Budgetary information, including EU funding sources, is still not systematically integrated and often remains in external documents. The integration of the twin transition also remains partial, partly due to the lack of fully developed indicators.

In terms of ambition, the roadmap confirms progress in infrastructure deployment and digital skills, while recognising that some targets – particularly in connectivity (notably fibre) and advanced technologies – depend on external factors such as regulatory developments, market conditions and private investment.

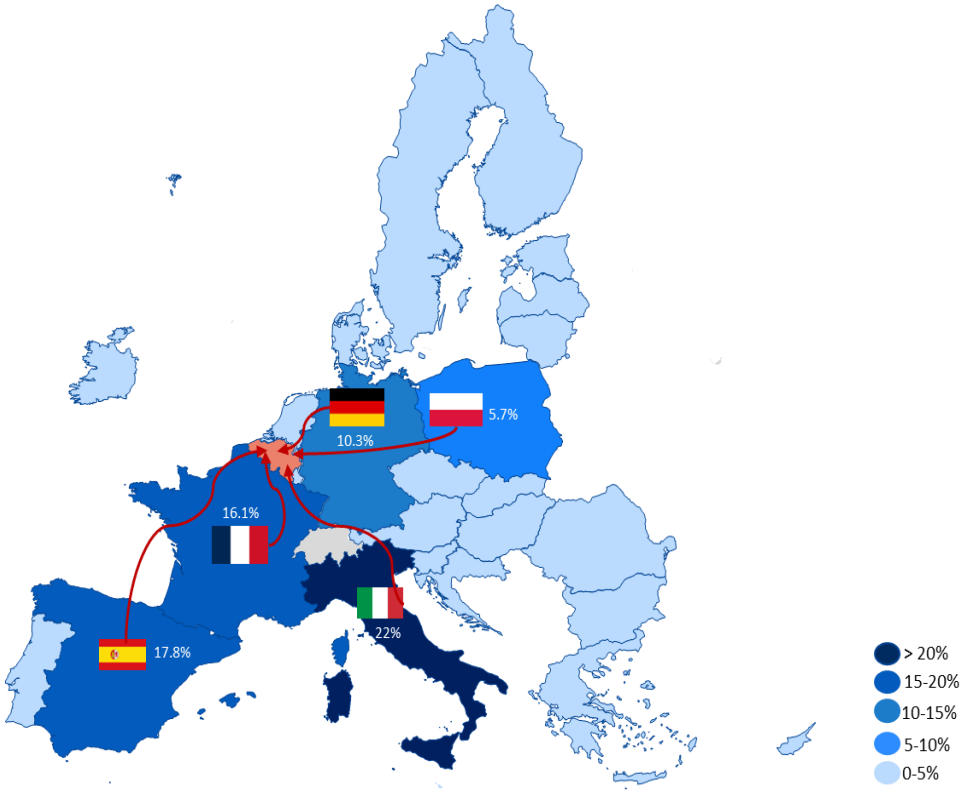
Overall, the revised roadmap demonstrates continued commitment to the 2030 Digital Decade targets, with a more streamlined policy framework and improved alignment with EU priorities. Strengths include the consolidation of measures, new initiatives in key areas such as digital skills, interoperability and data governance, and ongoing progress in infrastructure and advanced technologies. Remaining challenges relate to budget transparency, full integration of the twin transition, and delivery risks linked to external dependencies.

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

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

A modelling study conducted by the European Commission services, with the FIDELIO model, assesses the economic impact of the digital component of the RRF. As of November 2025, the digital part of the Recovery and Resilience Plan of Belgium was evaluated to EUR 1.20 billion with EUR 55 million for digital infrastructures, EUR 220 million for digital skills, EUR 384 million for the digitalisation of businesses, EUR 446 million for the digitalisation of public services, and EUR 99 million for other digital priorities.

The total economic impact of RRF digital measures is estimated to EUR 4.44 billion for the national economy. Of this, EUR 2.61 billion stems from the direct effects of Belgium's own RRP and EUR 1.82 billion corresponds to spillover effects from the implementation of other EU Member States' plans. Belgium benefited the most from spillover effects from RRPs of Italy (EUR 0.40 billion), Spain (EUR 0.32 billion), France (EUR 0.29 billion). The most impacted sectors are Manufacturing (EUR 0.82 billion), Professional Services (EUR 0.68 billion) and Construction (EUR 0.65 billion).



RRF spillover effects to Belgium

Belgium

Funding from the Recovery and Resilience Facility and Cohesion Policy

Belgium allocates 27% of its total RRP to digital (EUR 1.3 billion)[5]. In addition, under cohesion policy, EUR 0.4 million, representing 14% of the country's total cohesion policy funding, is dedicated to advancing Belgium's digital transformation[6].

Multi-Country Projects

Belgium is hosting the EUROPEUM EDIC. It is also a member of the Local Digital Twins towards the CitiVERSE EDIC and an observer to the Alliance for Language Technologies EDIC, for which the region of Flanders is a member. The Region of Flanders is an observer to the Digital Commons EDIC and is supporting the setting up of the EDIC in the area of agri-food. Belgian entities are indirect and/or associated partners in the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT) and in the IPCEI on Next Generation Cloud Infrastructure and Services (IPCEI-CIS). Belgium is a participating state of the EuroHPC Joint Undertaking (JU) and of the Chips JU.

[5] 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.

[6] 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.