Council of the European Union

Brussels, 24 June 2026
(OR. en)

10476/26
ADD 50

TELECOM 314
DIGIT 173
CYBER 287
COMPET 802
RECH 291
PI 74
MI 673
EDUC 279
JAI 851
ENFOPOL 232
COSI 103

COVER NOTE

From:	Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director
date of receipt:	17 June 2026
To:	Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union
No. Cion doc.:	SWD(2026) 155 annex
Subject:	PART 21/27 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

Delegations will find attached document SWD(2026) 155 annex.

Encl.: SWD(2026) 155 annex

EUROPEAN
COMMISSION

Brussels, 17.6.2026
SWD(2026) 155 final

PART 21/27

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

Poland

Poland

Contents

Executive summary

Overall, Poland is making promising progress in digitalisation, particularly in continuously improving the availability of digital public services. However, it continues to lag behind in terms of business digitalisation and uptake of key technologies, especially among SMEs, in terms of the basic digital skills of the wider population and in terms of its pool of ICT specialists. While fibre coverage is above the EU average, progress appears to have slowed in recent years. The draft State Digitalisation Strategy until 2035 (*Strategia Cyfryzacji Państwa do 2035*), expected to be adopted in June 2026, offers a promising and comprehensive direction for Poland's digital transformation. However, its impact will depend on the timely, well-coordinated identification and implementation of concrete measures. In this context, work is currently underway on an operational plan setting out the actions to be taken across the administration to implement the strategy.

The slow pace of digitalisation among SMEs is undermining Poland's **competitiveness**, considering that SMEs account for the vast majority of firms in Poland and play a key role in value creation. Furthermore, businesses with low digital intensity are less able to realise productivity gains from both basic and advanced digital tools and to expand into new business opportunities. Moreover, limited digital literacy constrains citizens' effective use of technology and weakens labour productivity growth, while a limited pool of ICT specialists reduces the capacity to fully leverage technological leadership assets.

In terms of **digital leadership**, Poland has been proactive in building quantum computing capabilities, notably through the launch of the PIAST-Q quantum computer under the EuroHPC Joint Undertaking in June 2025. It is also increasing AI capacity, with two AI Factories under development, the first of which is expected to begin offering services in 2026, while actively contributing to the European AI Gigafactory project. Poland has also developed niche expertise in certain areas of microelectronics and ranks as a highly attractive location for establishing back-end production. However, it has not yet been able to attract major investments which would enable it to develop its manufacturing capacity.

Poland in the Digital Decade

Poland shows a moderate level of ambition in its contribution to the Digital Decade having set 14 national targets (out of 14 possible), 71% of which aligned with the EU 2030 targets. In its national roadmap, Poland provided 13 trajectory points for 2025 (out of 13 analysed). The country is following them not well with only 31% considered on track. On the other hand, Poland addressed 70% of the 10 recommendations issued by the Commission in 2025 by making some changes through new measures. According to the national roadmap, by the end of 2026, 40% of the measures will come to an end. The total public budget associated to these measures is EUR 3.69 billion, representing 30% of the total public budget outlined in the roadmap.

According to the special Eurobarometer on the Digital Decade 2026, 78% of the Polish people consider that digital policy should have a very high/high priority for the EU in shaping our future in Europe. They also think that, in the next ten years, the EU should cooperate with Member States to reinforce cybersecurity and protection from online threats (87%), promote digital education and skills programs (87%) and strengthen the regulation of online platforms (e.g. online social networks, marketplaces, app stores, etc.) (85%).

In addition, 80% of Polish respondents think that the EU should reduce its dependencies on digital from third countries, and 84% that EU should prioritise investments in digital infrastructure and

services that are developed and controlled in Europe. Meanwhile, 64% 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

Poland allocates 21.3% of its total recovery and resilience plan to digital (EUR 7.3 billion). In addition, under cohesion policy, EUR 5.8 billion, representing 8% of the country's total cohesion policy funding, is dedicated to advancing Poland's digital transformation.

Poland is a member of the Alliance for Language Technologies EDIC, of the EUROPEUM EDIC and of the IMPACTS EDIC. Poland is directly participating in the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT) and in the IPCEI on Next Generation Cloud Infrastructure and Services (IPCEI-CIS). Poland is also a participating state of the EuroHPC Joint Undertaking (JU) and of the Chips JU.

Digital Decade KPI (1)	Poland				EU		Digital Decade target by 2030	
	Last available	DESI 2026 (year 2025)	Annual progress	National trajectory	DESI 2026	Annual progress	PL	EU
Fixed Very High Capacity Network (VHCN) coverage	83.8%	84.1%	0.3%	90.0%	85.5%	3.7%	100.0%	100%
Fibre to the Premises (FTTP)	77.8%	78.6%	1.1%	90.0%	74.1%	7.1%	100.0%	-
Basic 5G coverage	89.3%	94.0%	5.3%	99.6%	96.8%	2.6%	100.0%	100%
Edge Nodes (estimate, new methodology)	-	574	-	21	7451	-	370	10000
SMEs with at least a basic level of digital intensity *	50.0%	59.0%	8.6%	71.9%	71.4%	11.0%	90.0%	90%
Cloud *	46.5%	45.8%	-0.8%	58.6%	46.7%	9.5%	75.0%	75%
Artificial Intelligence	5.9%	8.4%	41.7%	5.0%	20.0%	48.0%	10.0%	75%
Data analytics *	19.3%	24.5%	12.6%	23.3%	39.9%	9.5%	35.0%	75%
AI or Cloud or Data analytics *	51.8%	52.7%	0.9%	-	63.2%	7.5%	-	75%
Unicorns	12	13	8.3%	14	324	10.2%	20	500
At least basic digital skills *	44.3%	50.4%	6.7%	54.5%	60.4%	4.3%	80.0%	80%
ICT specialists	4.5%	4.5%	0.0%	4.9%	5.0%	2.0%	6.0%	~10%
e-ID scheme notification		Yes						
Digital public services for citizens	70.7	83.9	18.7%	88.5	84.6	2.8%	100.0	100
Digital public services for businesses	85.0	88.8	4.4%	91.9	88.6	2.7%	100.0	100
Access to electronic health records	91.8	91.8	0.0%	90.0	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

Poland's digital **connectivity** performance shows a mixed picture, with its FTTP coverage above the EU average and its VHCN and 5G coverage below the EU average, particularly in the key 3.4–3.8 GHz band. To allow for further progress in broadband coverage, overcoming urban-rural and regional disparities will be crucial, as significant gaps persist in VHCN and FTTP rural coverage particularly in northern Poland, driven by the challenging terrain, low population density and dispersed housing. Moreover,

by further reinforcing its backbone infrastructures, including internal country links, Poland could strengthen its role as a secure regional data hub, also in view of connectivity with neighbouring regions.

On the business side, **SMEs** are still lagging behind in basic digitalisation, with key bottlenecks being difficulties in accessing funding opportunities, and limited skills, awareness and internal capacity leading to piecemeal implementation of digital solutions. **Uptake of advanced technologies** by businesses, especially SMEs, is also subpar, with adoption rates for data analytics and AI the lowest and second lowest in the EU respectively. Recent reports suggest the primary constraint for AI adoption is not necessarily a lack of awareness, but rather the transition to deployment, with doubts about the reliability of AI outputs, concerns over data security and high implementation costs cited as the main barriers. Meanwhile, limited access to finance, including venture capital funds, continues to restrict the growth of Polish **start-ups**, although Poland has taken measures to address this and plans to adopt a comprehensive strategy to develop its startup ecosystem.

In the area of **cybersecurity**, Poland is strengthening its cybersecurity governance framework, notably through an amendment to the Act on the National Cybersecurity System as part of reforms under the Polish recovery and resilience plan (RRP). It is also implementing measures to improve cybersecurity in public administration and businesses. However, Poland's geopolitical situation and its heightened exposure to hostile activity, including an attempt to infiltrate the country's energy system in December 2025, as well as a growing number of cyber-related incidents being reported by Polish businesses, underscore the need to sustain efforts to reinforce resilience.

Protecting and empowering EU people and society

Despite improvement, the level of **basic digital skills** remains below the EU average and significant urban-rural and age-related disparities persist, with several large-scale measures (e.g. Digital Development Clubs) so far in the early stages of implementation. Amid recent targeted Foreign Information Manipulation and Interference (FIMI) linked to security incidents, Poland's below-average performance in terms of verifying online information and its still fragmented coordination of counter-disinformation activities point to a need to strengthen efforts to foster online safety and critical-thinking skills.

The size of Poland's pool of **ICT specialists** remains below the EU average and largely unchanged since 2024, potentially hindering Poland's increased ambition to leverage its digital leadership assets in areas such as AI, quantum technologies and semiconductors. The share of women working as ICT specialists has been declining since 2023, with initiatives designed to address this showing limited results so far.

Poland has launched a number of initiatives to **digitalise public services** and administration, placing emphasis on digital sovereignty by developing state-owned cloud and open-source Polish LLMs, one of which is already in use for its public service app mObywatel. Poland performs at around EU average level in terms of availability of digital public services for businesses, but below the EU average in terms of availability for citizens. Nevertheless, the gap has narrowed as significant progress has been made since 2024, to a great extent thanks to investments under the Polish RRP. However, there is still room for improvement in the cross-border availability of digital public services for both citizens and businesses. Notably, the amendment to the Act on the Computerisation of the Operations of Entities Performing Public Tasks, adopted in 2025 as part of the Polish RRP reforms package, lays the groundwork for the development of solutions in the area of national and European interoperability.

Recommendations

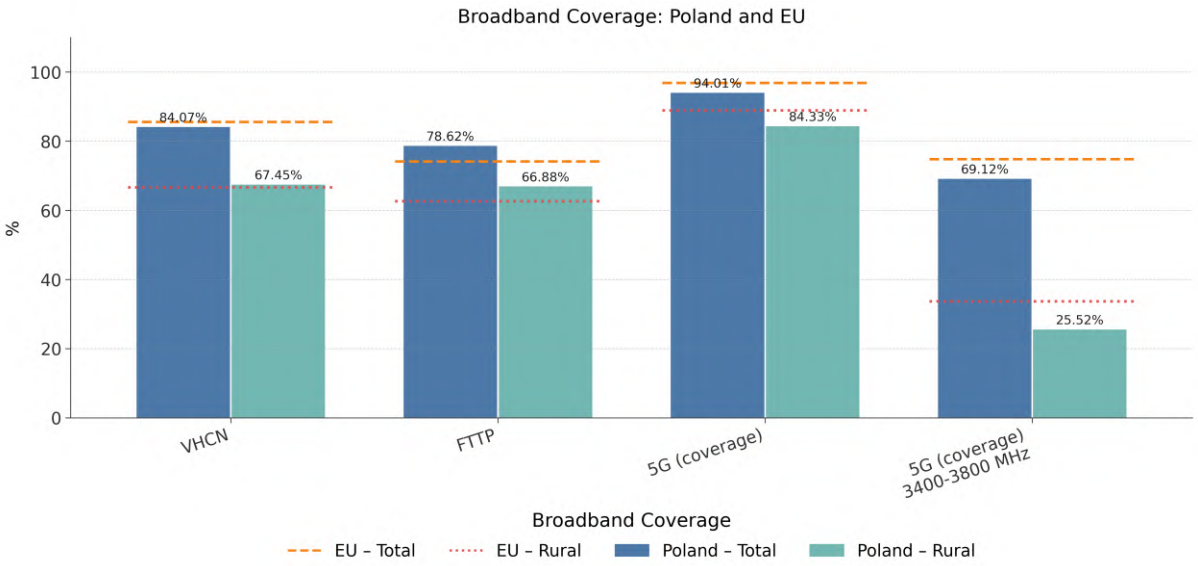
- **Digital skills:** Foster digital skills and strengthen measures supporting social groups with lower digital skills, such as older adults and inhabitants of rural areas, including through raising awareness of existing and planned measures, and building on the ongoing revision of the Digital Competence Development Programme. Improve coordination and strengthen measures aimed at raising awareness of Foreign Information Manipulation and Interference (FIMI) and fostering critical thinking skills.
- **Digitalisation of SMEs and uptake of advanced technologies**: Strengthen the digitalisation of SMEs and accelerate the uptake of advanced technologies, such as AI, in particular by: (i) directing existing and future support towards businesses with lower levels of digital maturity, especially micro-enterprises, including through tailored advisory services, and assistance in accessing funding opportunities; (ii) supporting the deployment and effective use of AI infrastructures for businesses such as AI Factories, AI Testing and Experimentation Facilities, and European Digital Innovation Hubs; (ii) translating the revised national AI policy into concrete measures for key sectors, including via sectoral flagship initiatives of the Apply AI Strategy.
- **ICT specialists:** Increase the ambition of measures to expand the supply of ICT specialists, especially in key frontier technologies, in particular by: (i) strengthening the national offer of training pathways for ICT specialists and increasing participation in STEM fields in higher education; (ii) introducing incentives to attract and retain ICT specialists; (iii) taking action to reverse the decline in the share of women among ICT specialists by scaling up targeted training and mentoring schemes.
- **Connectivity:** Strengthen connectivity infrastructure, in particular by: (i) accelerating the rollout of gigabit coverage and strengthening focus on reducing rural-urban and regional disparities, e.g. through strengthening the role of the local authorities on the telecommunications market, (ii) building on the achievements of the National Broadband Plan (2020-2025) by swiftly adopting a post-2025 roadmap, (iii) accelerating 5G rollout in the 3.4–3.8 GHz band and promoting the deployment of 5G SA networks, while enabling advanced use cases, and taking advantage of the upcoming expiry of rights of use to negotiate pro-investment conditions, (iv) reinforcing backbone infrastructure resilience to effectively play a role as a secure regional data hub, including diversifying submarine cable routes and enhancing high-capacity terrestrial links.
- **Cybersecurity:** Support the public and private sector, and in particular SMEs in implementing cybersecurity measures, in particular by increasing cybersecurity awareness and the cybersecurity talent pool in order to enhance resilience and preparedness for cybersecurity incidents.
- **Digitalisation of public services:** Build on recent legal achievements to strengthen digital public services and improve efficiency, in particular by strengthening interoperability and practical application of the once-only principle across different levels of government, as well as by improving cross-border usability.
- **Semiconductors:** Invest in the development of semiconductor back-end technologies, notably heterogeneous integration and advanced packaging and support the development and retention of specialised semiconductor skills, particularly in the fields of engineering, design, research and advanced semiconductor technologies.

A competitive, sovereign and resilient EU based on technological leadership

Building technological leadership: digital infrastructure and technologies

Connectivity infrastructure

Performance assessment



Poland's Very High Capacity Network (VHCN) coverage reached 84.07% in 2025, marking an annual growth rate of 0.3% (from 83.84% in 2024). Poland is now below the EU average, which grew by 3.7% to 85.54%, compared to the 2024 EU average of 82.49%. In 2024, Poland's coverage exceeded the EU average, but following slow growth in 2025 has since slipped behind the EU average. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

Poland's VHCN coverage for rural households was 67.45% in 2025, an increase of 1.4% compared with 2024 (66.49%). While Poland's coverage in rural areas remains above the EU average which grew from 61.87% in 2024 to 66.66% in 2025, the annual growth rate for the EU as a whole (7.7%) far outpaced that of Poland's.

Poland fibre-to-the-premises (FTTP) coverage reached 78.62% in 2025, reflecting an annual growth rate of 1.1% from 77.79% in 2024. Although Poland's FTTP coverage continues to exceed the EU average, which increased from 69.24% in 2024 to 74.13% in 2025, the annual growth rate for the EU as a whole (7.1%) is significantly higher than that of Poland. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

Poland's FTTP coverage in rural areas was 66.88% in 2025, an increase of 1.9% compared with 2024 (65.64%). Poland's coverage in rural areas remains above the EU average, which rose from 58.76% in 2024 to 62.61% in 2025. However, the annual growth rate for the EU as a whole (6.5%) exceeded that of Poland.

Poland

Poland's basic 5G coverage stood at 94.01% in 2025, marking an annual growth rate of 5.3% from 89.28% in 2024. Poland's coverage remains below the EU average, which increased from 94.35% in 2024 to 96.79% in 2025. The annual growth rate for the EU as a whole (2.6%) is lower than that of Poland, although the average EU level of basic coverage is higher. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

Poland's 5G coverage for rural households was 84.33% in 2025, representing a substantial annual growth rate of 16.6% (compared with 72.35% in 2024). Although Poland's coverage in rural areas is below the EU average which grew from 79.58% in 2024 to 88.88% in 2025, Poland's growth rate surpassed that of the EU (11.7%).

Poland's 5G coverage in the 3.4–3.8 GHz band was 69.12% in 2025, an increase of 14.8% from 60.2% in 2024. Poland's coverage remains below the EU average which rose from 67.6% in 2024 to 74.75% in 2025. However, Poland's annual growth rate exceeded that of the EU (10.6%).

In sparsely populated areas, Poland's coverage in the 3.4–3.8 GHz band was 25.52% in 2025, representing an annual growth rate of 46.9% (compared with 17.38% in 2024). While Poland's coverage is lower than the EU average which increased from 25.36% in 2024 to 33.71% in 2025, Poland's growth rate outpaced that of the EU (32.9%).

Overall, Poland's performance in relation to digital infrastructure shows a mixed picture relative to the EU average. Poland’s FTTP coverage remained higher than the EU average, while its VHCN coverage slipped behind the EU average. In terms of 5G coverage, despite improvements, Poland remains below the EU average, particularly in the key 3.4-3.8 GHz mid-band, which provides a good balance between coverage and high capacity, making it a cornerstone for advanced 5G use cases that can be replicated as reference models across sectors and socio-economic drivers (e.g. industrial IoT, telemedicine). Sustained investment and policy support will be crucial to ensure Poland continues to improve its digital infrastructure and competitiveness within the EU. Notably, the upcoming spectrum licence expiry in 2030 presents an opportunity to establish pro-investment conditions[1].

The table below provides an overview of VHCN, FTTP and 5G coverage across NUTS-2 regions in Poland. It reveals **significant regional differences in VHCN and FTTP rural coverage**, with the lowest coverage rates observed for Kujawsko-Pomorskie, Pomorskie and Warmińsko-Mazurskie provinces. For 5G meanwhile, coverage is strong across all regions with only minor differences.

[1] 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.

	VHCN coverage		FTTP Coverage		5G Coverage	
	Overall	Rural	Overall	Rural	Overall	Rural
National coverage	84.07%	67.45%	78.62%	66.88%	94.01%	84.33%
Dolnośląskie	79.14%	52.53%	72.64%	52.31%	88.78%	66.07%
Kujawsko-pomorskie	75.20%	41.76%	71.29%	41.42%	96.50%	90.69%
Łódzkie	87.77%	72.87%	79.63%	72.79%	96.95%	90.22%
Lubelskie	80.89%	72.38%	79.03%	72.38%	84.05%	69.71%
Lubuskie	75.14%	48.78%	66.08%	47.83%	92.29%	79.73%
Małopolskie	90.46%	84.77%	88.33%	84.77%	90.73%	79.42%
Mazowiecki regionalny	73.64%	56.50%	71.96%	56.47%	93.61%	87.82%
Opolskie	89.22%	83.15%	84.46%	83.15%	94.26%	86.32%
Podkarpackie	89.84%	87.33%	88.92%	87.33%	90.13%	81.55%
Podlaskie	80.77%	51.36%	80.17%	51.36%	96.61%	90.96%
Pomorskie	72.56%	43.71%	54.54%	39.10%	95.69%	88.09%
Śląskie	93.10%	92.12%	85.45%	92.12%	95.88%	85.05%
Świętokrzyskie	85.21%	77.35%	82.72%	77.35%	93.56%	87.82%
Warmińsko-mazurskie	73.09%	37.64%	68.86%	36.98%	94.75%	86.61%
Warszawski stołeczny	95.83%	79.96%	95.36%	79.00%	97.55%	92.97%
Wielkopolskie	80.28%	67.72%	74.71%	66.55%	96.43%	91.43%
Zachodniopomorskie	80.66%	54.45%	67.28%	52.98%	97.10%	90.24%

In terms of take-up, Poland reached 10.23% fixed broadband subscriptions >= 1 Gbps in 2025, representing an annual growth rate of 12.2%. Nevertheless, it remains below the EU average of 26.97%. In 2024, the figure for Poland was 9.11%, which was also lower than the EU average of 22.25%. Poland's annual growth rate in 2025 was lower than that of the EU (21.2%).

The share of the population in Poland with a 5G SIM card was 91.0% in 2025, representing an increase of 179.1% and standing well above the EU average of 55.55%. In 2024, the figure for Poland was 32.6%, which was lower than the EU average of 35.56%. Poland's annual growth rate in 2025 was significantly above that of the EU (56.2%).

Policy context and assessment of recommendations

In 2025, Poland continued to expand VHCN and FTTP coverage through EU-funded investments, although progress was slower than in previous years. Poland continued to rely on investments under its RRP and under the European Funds for Digital Development (*Fundusze Europejskie na Rozwój Cyfrowy, FERC*) to improve access to high-speed internet in white-spot areas and reduce regional disparities. However, implementation difficulties prompted an amendment to the Polish RRP in 2025, reducing the ambition for the number of additional households with broadband access (at least 100Mbps). The Polish authorities envisage the continuation of similar measures under the next revision of the national broadband plan after the end of the current 2020-2025 roadmap.

While overall VHCN and FTTP coverage in rural areas is above the EU average, pronounced regional differences persist. Coverage is notably lower in northern Poland, specifically in Kujawsko-Pomorskie, Pomorskie and Warmińsko-Mazurskie provinces, where less than 45% of rural households have access to gigabit connectivity. The primary obstacles stem from the challenging terrain, low population densities and scattered housing, which make rollout relatively costly. The Polish authorities aim to conduct targeted analyses at municipality (*gmina*) level to identify the main barriers to

implementation. Depending on the outcomes, they may initiate regional-specific actions or make legislative amendments to mitigate issues, e.g. by giving local and regional authorities the powers to act on the telecommunications market in the same way as commercial operators or by introducing subsidies for the construction of fibre connections to base stations.

Gradual progress, driven predominantly by market demand, is being made in the decommissioning of copper cable networks. In February 2026, the incumbent operator Orange Polska S.A. stopped offering new retail services based on xDSL technology. It will continue to maintain existing services while progressively switching over to fibre or mobile technology. Overall, the share of copper cable networks is steadily declining as operators tend not to upgrade existing networks but are instead investing in fibre due to increased market demand and the availability of EU funding. In 2024, less than 10% of users were still utilising xDSL, down from 14% in 2022. By the end of 2025, approximately 450 000 households had access only to the fixed copper networks. However, as broadband markets in Poland are no longer subject to sector-specific regulation, there is no longer an obligation to formally notify or report copper decommissioning to Poland's national regulatory authority. Furthermore, there is no dedicated plan and no date for full copper switch-off.

Investments in 5G coverage have been progressing since Poland finalised the allocation of key frequency bands. Following the allocation of the 3.6 GHz pioneer band in 2024, the auction to distribute rights to the key 700 MHz band was completed in March 2025, while reservation decisions assigning spectrum were issued in June 2025. Under these agreements, operators have committed to significant investments aimed at extending 5G coverage, with the objective to of reaching 99% of households and 90% of Poland's territory within three to five years, ensuring a target bandwidth of 120 Mbps. Meanwhile, consultations regarding the 26 GHz band have revealed a cautious approach, with key operators agreeing on the premature nature of its commercial utilisation and recommending it to be made available between 2027 and 2030. 5G standalone networks are still in pilot phase and not yet commercially available.

Poland is developing backbone infrastructure, including with support under the Connecting Europe Facility (CEF) Digital Programme. CEF Digital is supporting six Digital Global Gateway projects involving Poland (total EU contribution of EUR 17 million), including Bridging Eastern Europe, with the intention of deploying 873 km of new fibre optic routes running through Warsaw and interconnected with existing networks at several sites near Poland's borders (Kostrzyn, Zwardoń, Cieszyn and Budzisko). Meanwhile, the recent report on the security and resilience of EU submarine cable infrastructures highlights the need for a new submarine cable in the Baltic Sea to improve and diversify links between Member States in the region, including Poland, in view of strengthening the resilience of digital infrastructure.

2025 recommendation on 5G: Encourage operators to speed up the deployment of 5G stand-alone core networks.
No information available on measures taken to address the recommendation. For the moment, operators are focusing primarily on non-standalone 5G coverage as part of the obligations following the auctions of the 700 MHz (concluded in mid-2025) and 3.6 GHz bands. Pilots for 5G SA networks have been carried out by some operators, but broader commercial deployment has yet to start.

Semiconductors

In the field of microelectronics, Poland's expertise lies primarily in research and development, while manufacturing capacity remains limited. Poland has built up expertise in the areas of photonic

integrated circuits, notably through the key HyperPIC project led by Vigo Photonics under IPCEI ME/CT, which aims to develop integrated photonics technology and create a national platform for the production of advanced photonic systems. Polish R&D centres (IWC PAN, Łukasiewicz-IMiF, CEZAMAT) are also participating in the development of pilot lines under the Chips Joint Undertaking (Chips JU), including the Wide Band Gap and FAMES pilot lines. However, for now, domestic front-end and back-end manufacturing capacities remain limited. Poland is ranked as a highly suitable location for hosting back-end semiconductor production, however this potential has yet to be realised after Intel abandoned plans for the construction of a back-end facility in Wrocław in July 2025, following the initial suspension of the investment in September 2024.

Poland plans to adopt a comprehensive national strategy for the semiconductor industry development and strengthen cross-border collaboration. The draft strategy Poland in the game for the future: Policy for the semiconductor sector 2026+ (*Polska w grze o przyszłość: Polityka dla sektora połprzewodników 2026+*), initially presented in February 2025, was submitted for further public consultation in March 2026, with adoption expected in the second half of 2026. The draft document includes an objective to sign a trilateral memorandum of understanding with Czechia and Germany (state of Saxony) in 2027 on the creation of a "semiconductor triangle", with the intention to leverage the potential of neighbouring regions to create a technological microregion that will focus efforts on joint investments, research, and education in the semiconductor sector. There are also ongoing efforts to increase cooperation with Taiwan, and in March 2026 the Taiwan Electrical and Electronic Manufacturers' Association (TEEMA) announced its decision to establish a technology park in Poland. Poland also launched calls under the upcoming IPCEI on Advanced Semiconductor Technologies (IPCEI AST).

2025 recommendation on semiconductors and digital innovation: Invest in the development and manufacturing of critical technologies in the areas of digital and deep tech.
Poland made some efforts to address the recommendation through new policy actions in 2025. In 2025, the first calls were launched under the European Funds for Smart Economy programme (*Fundusze Europejskie dla Nowoczesnej Gospodarki, FENG*) concerning the Strategic Technologies for Europe Platform (STEP) in the area of digital technologies and deep tech innovation, with the objective of supporting businesses in the development of critical technologies. Poland continued investments under its main support instrument, i.e. the national framework for supporting strategic semiconductor investments (*Krajowe Ramy Wspierania Strategicznych Inwestycji Półprzewodnikowych*), backed by a budget of EUR 1.5 billion for the period 2024-2026, which is aimed at supporting projects for developing the production of semiconductors in Poland and enhancing the competitiveness of the EU economy. Poland has plans to extend and increase the flexibility of this instrument, as well as to increase investments in line with the draft national strategy for the semiconductor sector. However, for now only limited information is available on specific measures.

Edge nodes

Performance assessment

According to the Edge Node Observatory, Poland is estimated to have deployed a total of 574 edge nodes by 2025. Due to a change in methodology, this number cannot be compared to previous estimates.

Poland

Policy context and assessment of recommendations

In 2025, Poland began implementing the EdgePL project with a view to developing a model for a full-scale system of edge node infrastructure. A pilot network of 32 edge nodes was deployed as part of Poland's PIONIER network architecture and academic MAN networks. The infrastructure, comprising a computing layer, a service quality monitoring system and delay measurement mechanisms, lays the foundation for further infrastructure development on a nationwide scale. The draft State Digitalisation Strategy until 2035 identifies edge computing as one of the current breakthrough technologies, but without setting out targeted measures to support it.

As part of Poland's efforts to strengthen digital sovereignty and reduce dependence on external resources for data processing, work is underway to expand the services and infrastructure of the Government Cloud (*Rządowa Chmura Obliczeniowa, RchO*). This state-owned cloud is intended for use by the public administration. Poland is also implementing several projects under IPCEI-CIS, including a cross-border initiative also involving France, Germany, Hungary, Italy, the Netherlands and Spain, aimed at developing a multi-provider cloud-to-edge continuum, with a total public investment worth EUR 1.2 billion.

Quantum technologies

In 2025, Poland made significant progress in building up quantum computing capacity, with notable developments in quantum infrastructure. The launch of the PIAST-Q quantum computer at the Poznań Supercomputing and Networking Centre (PCSS) in June 2025 was a major event, marking the operational deployment of the first quantum computer under the EuroHPC Joint Undertaking. In terms of its availability for businesses, a pilot programme for business users is planned, with performance tests and example use cases due to be developed to prepare for the deployment phase and for use by the private sector in areas such as quantum optimisation, quantum chemistry, quantum materials sciences and quantum machine learning. Poland was also part of the international consortium financing the second EuroHPC quantum computer, VLQ, which was launched in September 2025 in Ostrava, Czechia. In addition to EuroHPC initiatives, the Odra 5 quantum computer was launched in May 2025 at the Wrocław Centre for Networking and Supercomputing. The Ministry of Digital Affairs is preparing a national policy for quantum technologies, which will cover activities until 2035, expected to be adopted in the second half of 2026.

Poland is strengthening its position in the European quantum communication infrastructure (QCI) ecosystem. As part of the EuroQCI, Poland will participate in projects intended to develop Quantum Key Distribution (QKD) communications, which together with the satellite-based PIONIER-Q-SAT project (EUR 9.9 million) will connect the national PIONIER-Q network with the infrastructures of other EU countries. Notably, migration to post-quantum cryptography and the development of national cryptography and quantum technologies are priorities under the recently adopted National Cybersecurity Strategy 2025-2029.

Supporting EU-wide digital ecosystems and scaling up innovative enterprises

SMEs with at least basic digital intensity

Performance assessment

In Poland, 58.98% of SMEs now have at least a basic level of digital intensity after an annual progression of 8.6% between 2023 and 2025, still below the EU average of 71.39%. In 2023, the figure for Poland was 50.04%, which was also lower than the EU average of 57.9%. Despite the increase, Poland's SMEs are digitalising at a slower pace compared to the EU average annual growth rate of 11.0%. This indicates that while progress is being made, Polish SMEs are not keeping up with the pace of digitalisation in the EU. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

When examining SMEs with a very high digital intensity, Poland is at 5.18% after an annual growth rate of 25.3% since 2023, but well below the EU average of 9.07%. In 2023, the figure for Poland was 3.3% compared to the EU average of 4.38%. The EU's annual growth rate for this indicator was 43.9%.

Policy context and assessment of recommendations

The level of digitalisation among Polish SMEs remains inconsistent and is being held back by complexities in accessing funding opportunities, haphazard implementation and persistent awareness gaps. The 2026 report on SME digitalisation by the Polish National Development Bank (Bank Gospodarstwa Krajowego, BGK) found that progress was weakest among micro and small enterprises, where day-to-day operational pressures reduce the scope for strategic adoption of technology. This has a significant impact since SMEs and, in particular, micro-enterprises, account for the vast majority of the country's firms and contribute an estimated 47% of GDP (27.9% from micro enterprises). According to the BGK report, Polish SMEs point to market uncertainty as well as insufficient and complex access to tailored funding opportunities as key barriers to digitalisation. Many SMEs also lack the skills and internal capacity to implement solutions systematically, often relying on outsourced providers. Digital investments are frequently implemented piecemeal and carried out in response to immediate operational pressures rather than as part of a coherent strategy. As a result, firms may digitise individual functions without integrating systems, building internal capabilities or setting measurable objectives, which limits the productivity gains and business opportunities these investments could deliver. Furthermore, significant knowledge gaps persist around basic tools such as e-commerce and customer service platforms, which limits the possibility to transition from implementing basic technologies to advanced digital solutions. Targeted, size- and sector-specific advisory support could help SMEs raise awareness of funding opportunities, diagnose needs, and implement appropriate solutions in a way that maximises benefits and avoids costly trial-and-error.

Against this backdrop, the Polish authorities aim to strengthen coordination and scale up efforts to accelerate SME digitalisation. The Ministry of Development and Technology is developing the SME Digital Transformation Programme (Program Transformacji Cyfrowej Małych i Średnich Przedsiębiorstw) as an implementing document to the upcoming State Digitalisation Strategy which is expected to be adopted in the first half of 2026. The programme aims to strengthen institutional ownership in the digital transformation of companies and bring together existing support measures under a single authority, as well as increase the level of digital technology uptake, cybersecurity and digital awareness of micro, small and medium-sized enterprises.

2025 recommendation on digitalisation of SMEs: Enhance digitalisation of SMEs, including by directing existing support to those who lag in digitalisation and improving their awareness of the benefits offered by digitalisation and of the available support options.
Poland made some efforts to address the recommendation through new policy actions in 2025. In 2025, the first call was launched under the new DIG.IT program co-financed by the European Funds for Smart Economy (*Fundusze Europejskie dla Nowoczesnej Gospodarki, FENG*), which assists SMEs in the manufacturing sector with implementing digital technologies (including big data, AI and cybersecurity) via non-repayable grants. Poland continued the implementation of the information and education campaign targeting entrepreneurs project, moving beyond its pilot phase and launching a large-scale campaign in October 2025, including webinars, training materials and guides on digital transformation, cybersecurity, AI use, public e-services, aiming to raise awareness of the benefits of digitalisation and support the safe deployment of new technologies. The campaign is expected to run until May 2027. In addition, Polish SMEs had continued access to support from European Digital Innovation Hubs (EDIHs), co-financed under FENG and the Digital Europe Programme, and through the Digital Business Kit (Cyfrowa wyprawka dla firm) which offers comprehensive advice on digitalisation.

Take up of advanced technologies

Performance assessment

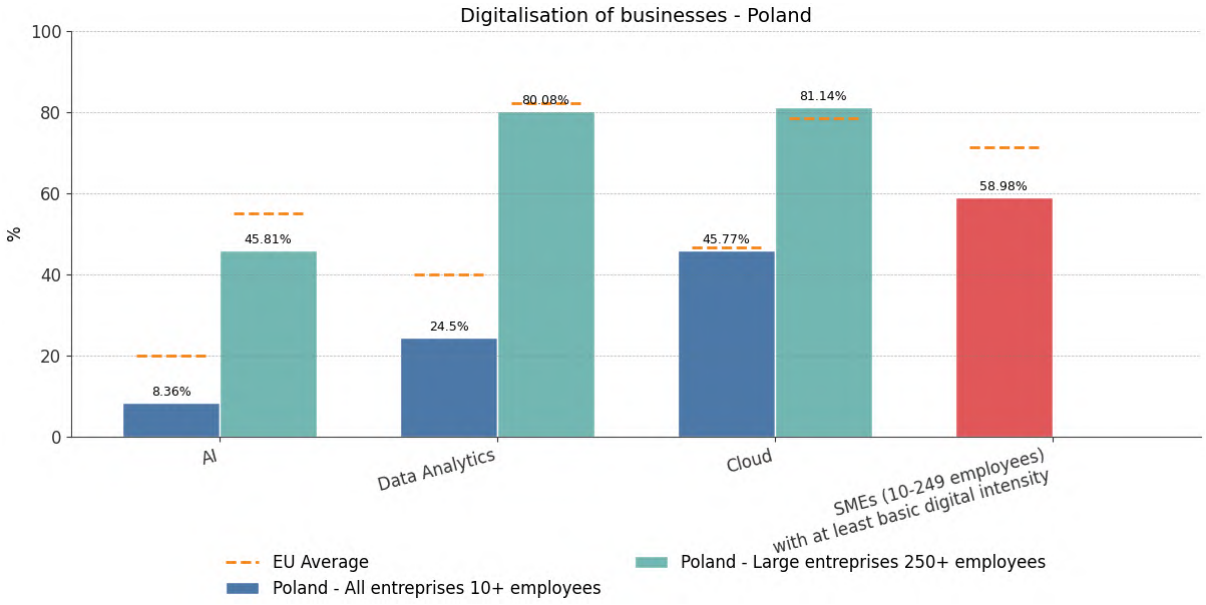
In terms of data analytics, Poland is at 24.5% adoption among all enterprises after an annual growth rate of 12.6% since 2023, which is below the EU average of 39.85%. The country is on track according to its trajectory presented in the Digital Decade national roadmap. In 2023, the figure for Poland was 19.31%, compared to the EU average of 33.25%. However, Poland's annual growth rate exceeds that of the EU (9.5%), suggesting it is successfully managing to catch up with the EU average. Specifically among SMEs, the figure for Poland is 22.61% after a growth rate of 13.3%, as compared to an EU average of 38.59% and an EU average growth rate of 9.7%. Use of data analytics by large enterprises in Poland is higher (80.08%), having increased by 10.4%, but is still below the EU average of 82.03%.

Regarding cloud technologies, Poland's adoption among all enterprises is 45.77%, broadly unchanged since 2023 (-0.8% annually) and below the EU average of 46.69%. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap. In 2023, the figure for Poland was 46.5%, surpassing the EU average of 38.97%. Among SMEs, the figure for Poland is 44.57%, down 1.0%, as compared to an EU average of 45.74% and an EU average growth rate of 9.7%. Large enterprises in Poland, however, show a higher adoption rate of 81.14% after a growth of 3.6%, exceeding the EU average of 78.32%.

In terms of the adoption of artificial intelligence, Poland is at 8.36% among all enterprises after an annual growth rate of 41.7%, which is below the EU average of 19.95%. The country is on track according to its trajectory presented in the Digital Decade national roadmap. In 2024, the figure for Poland was 5.9%, compared to an EU average of 13.48%. Among SMEs, the figure for Poland is 7.09% after a growth rate of 44.1%, as compared to an EU average of 18.9% and an EU growth rate of 49.5%. Large enterprises in Poland show a higher adoption rate of 45.81% after a growth of 39.0%, though this is still below the EU average of 55.03%.

When considering the adoption of AI, cloud, or data analytics technologies combined, Poland is at 52.73% among all enterprises after a minimal growth of 0.9%, significantly below the EU average of 63.2%. In 2023, the figure for Poland was 51.77%, compared to an EU average of 54.7%. Among SMEs,

the figure for Poland is 51.35% after a growth of 0.9%, compared to an EU average of 62.32% and an EU growth rate of 7.7%. Large enterprises in Poland show a higher adoption rate of 93.22% after a growth of 2.6%, slightly above the EU average of 92.78%.



Policy context and assessment of recommendations

Despite recent progress, advanced technology adoption rates in Poland are still well below the EU average, particularly among SMEs, which is holding back advanced digital transformation. While it is more common for Polish businesses to adopt cloud technologies, their use of data analytics and AI remains niche, with adoption rates the lowest and second lowest in the EU respectively. According to the aforementioned 2026 report by the BGK, the majority of SMEs state that they either lack familiarity with or lack deployment plans for AI and business intelligence/big data. A 2025 COMARCH report indicates that low AI uptake among Polish SMEs is primarily due to limited recognition of its strategic value: only 11% of surveyed firms viewed AI as a key technology, while 28% expected it to have no business impact. The report points to doubts about the reliability of AI outputs, concerns over data security and high implementation costs as the main barriers to adoption, while for cloud technology adoption, the key obstacles are perceived high costs, security concerns, and a belief that existing IT solutions are already sufficient. The Polish authorities also point to the lack of sufficient implementation capacity and deployment-oriented support as the main obstacles to accelerating advanced technologies adoption among SMEs.

Poland's AI ecosystem remains fragmented, but the Polish authorities recognise the need for prioritisation and consolidation. Although funding programmes exist, coordination between actors, continuity of long-term investment, and practical access to infrastructure are still a work in progress, underscoring the need for stronger governance and sustained commitment. The Polish authorities are in the process of setting up a Council for Artificial Intelligence Funds to coordinate AI-related funding, but its establishment, originally expected in June 2025, has been significantly delayed. The revised Policy for the Development of Artificial Intelligence in Poland until 2030, expected to be adopted by the Council of Ministers in the second half of 2026, identifies AI take-up in business as a key area, and sets the goal for 34% of Polish SMEs to be using AI tools in their business processes by 2030. The policy also foresees development of sectoral implementation maps allowing for targeted investments in industries with the greatest potential as well as ongoing monitoring of the impact of AI on the economy and the labour market. The strategy also calls for the AI ecosystem to be developed based

on open data and open-source models, including the continuous development of two Polish open-source LLMs (PLLuM and Bielik), as well as by strengthening human capital through training initiatives for entrepreneurs, scientists and public servants. At the same time, the Polish authorities continue to count on cooperation with global companies such as Microsoft which is expected to invest PLN 2.8 billion in expanding cloud and AI infrastructure in Poland by June 2026.

Poland will play an important role in the EU's AI Factory ecosystem. The PIAST-AI Factory is being developed at the Poznań Supercomputing and Networking Centre (PCSS) under the EuroHPC JU, with services due to be made available in the third quarter of 2026. The AI Factory is expected to integrate HPC, cloud-based AI services, and cutting-edge research infrastructure to provide an integrated ecosystem of AI services across sectors such as healthcare and life sciences, IT and cybersecurity, space and robotics, sustainability (energy, agriculture, climate change), and the public sector. In October 2025, a second AI factory, Gaia AI Factory, was selected for development in Kraków, with construction officially inaugurated in May 2026. It is expected to collaborate with the PIAST AI Factory and the LUMI AI Factory in Finland to create an integrated AI ecosystem in central Europe. Meanwhile, in March 2026 the Polish national research institute NASK launched its first supercomputer for AI computations, a project worth PLN 30 million aimed at supporting research and development of tools to address the needs of the state and the general public.

2025 recommendation on Artificial Intelligence: Create an AI friendly ecosystem by stimulating public and private investments in research and innovation, raising awareness among entrepreneurs, increasing access to specialised knowledge and computing power, and implementing consistent legal frameworks and standards.
Poland made some efforts to address the recommendation through new policy actions in 2025. Many of these actions are still in the preparatory stages, while the creation of the Council for Artificial Intelligence Funds has been delayed. Future AI Factories are expected to give businesses and research organisations access to high-performance computing capacity, experimentation support and a broader innovation network, and Poland has plans to further foster the creation of an AI friendly ecosystem by way of a comprehensive national AI policy (see above). Poland continued the implementation of the information and education campaign targeting entrepreneurs project, taking it beyond the pilot phase and launching a large-scale campaign in October 2025 with the aim of raising awareness of the benefits of digitalisation and supporting the deployment of new technologies, including AI. In March 2026, the Council of Ministers adopted the draft act on AI systems, intended to implement the AI Act in Polish law, set up national supervision, and support innovation through a clearer framework.

2025 recommendation on cloud: Encourage the adoption of cloud technologies by businesses, focusing on sovereign European solutions.
Poland continued the implementation of existing measures but did not take any new measure. Poland continued the implementation of the information and education campaign targeting entrepreneurs project, taking it beyond the pilot phase and launching a large-scale campaign in October 2025 with the aim of raising awareness of the benefits of digitalisation and supporting the deployment of new technologies, including cloud.

Unicorns, scale-ups and start-ups

Performance assessment

At the beginning of 2026, Poland had 13 unicorns (national target of 20 by 2030), which is 1 more than in 2025 (12, figure revised). In its roadmap, Poland aimed at 14 unicorns by the end of 2025. The country is thus lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

Policy context and assessment of recommendations

According to the Global Startup Ecosystem Index 2025 Poland ranks 33rd globally and 20th in Europe, up one spot from 2024 in each case. Warsaw is Poland's leading start-up ecosystem and has a special strength in robotics where it ranks 21st globally. The report points to persisting challenges with overreliance on public funding and difficulties in attracting talent.

Polish start-ups face significant challenges, primarily stemming from limited access to venture capital and weak availability of long-term financing, which are crucial for scaling up operations. According to the 2025 annual report on Polish start-ups (Polskie startupy 2025), Polish start-ups are financed mainly by a mix of internal funds (76% of surveyed start-ups), domestic business angels (20%) and domestic venture capital, including the Polish Development Fund (PFR) (17%), while foreign investment remains low (1% foreign venture capital and 8% foreign business angels). The report highlights a lack of funding (reported by 49% of surveyed start-ups, with 33% reporting difficulties in obtaining late-stage funding), high labour costs (reported by 41% of start-ups, with 12% reporting also a lack of staff) and administrative burden (reported by 34% of start-ups) as the main barriers to the development of start-ups.

To address these challenges, Poland is looking to mobilise private capital and utilise public procurement for innovation. In November 2025, the Innovate Poland programme was launched, inspired by the French Tibi initiative. The programme will support projects at various stages of development, from their initial conception through to scale-up. PLN 4 billion in institutional funding[2] has been committed and will be invested through private equity and venture capital funds in approximately 250 companies, with plans to mobilise another PLN 4 billion in private capital. The revised Policy for the Development of Artificial Intelligence in Poland until 2030 also sets out plans to launch a dedicated venture capital fund for the AI industry. Furthermore, the National Centre for Research and Development (NCBR) has initiated calls for new research projects via public procurement (pre-commercial procurement, PCP), allocating approximately PLN 505 million in EU funds in 2025. This is expected to enable start-ups, including those developing digital technologies, to engage with the public sector, test and validate solutions in close-to-market conditions.

Poland also plans to adopt a comprehensive strategy for the development of the start-up ecosystem in Poland until 2035. The strategy will be preceded by an in-depth analysis of the start-up market in Poland and is intended to outline the long-term public policy approach to start-ups.

2025 recommendation on unicorns: Continue to improve the business environment and access to finance for digital start-ups, provide more tailored support to address the challenges for scaling business.

[2] Institutions involved include the Polish Development Fund (PFR), Bank Gospodarstwa Krajowego (BGK), the European Investment Fund (EFI), and the first commercial partner PZU.

Poland made some efforts to address the recommendation through new policy actions in 2025. While access to finance remains a key barrier to the development of start-ups, Poland has taken steps to mobilise investments for supporting projects at various stages of development (e.g. through the Innovate Poland programme). In 2025, Poland set up a Government Deregulation Team and launched a series of deregulation measures with a view to improving the overall business environment for enterprises.

Strengthening Cybersecurity & Resilience

Polish enterprises are lagging behind their EU peers in terms of their implementation of cybersecurity measures. In 2024, 53.24% of Polish enterprises had applied at least 5 cybersecurity measures (out of 11 measures as measured by Eurostat), below the EU average of 56.85%. The gap with the EU is particularly pronounced in the use of data backups (71.10% in Poland, 79.23% in the EU), maintaining log files after security incidents (33.95%, EU: 45.16%), and ICT risk assessment (25.88%, EU: 34.10%). However, Polish enterprises perform above the EU average in the use of encryption techniques (49.26%, EU: 39.72%).

Poland is facing growing challenges in the area of cybersecurity. Poland's frontline geopolitical position contributed to heightened cybersecurity risks, culminating in a targeted sabotage cyberattack on Poland's energy infrastructure in December 2025. Polish enterprises also face a significant risk of cyber-related incidents. In 2024, 32.47% of Polish enterprises experienced ICT security related incidents leading to unavailability of ICT services, destruction or corruption of data, disclosure of confidential information (for any reason), compared with the EU average of 21.54%. The Report on Cybersecurity in Polish companies (Cyberbezpieczeństwo w polskich firmach), prepared each year by Vecto, found that 76.2% of surveyed companies experienced at least one cybersecurity incident in 2025 (an increase of 2.3 pp year on year).

To address growing cybersecurity challenges, Poland has been strengthening its cybersecurity governance framework, notably through an amendment to the Act on the National Cybersecurity System (entered into force in April 2026) transposing the NIS2 Directive into national law, and the adoption of the National Cybersecurity Strategy 2025-2029 in March 2026. The revised legislation is intended to strengthen the role of the Joint Cybersecurity Operations Centre (PCOC) as a central institution for coordinating cybersecurity at national level, while expanding sectoral cybersecurity incident response teams (CSIRTs). The new strategy also reinforces technological sovereignty with plans to implement mechanisms to eliminate high-risk suppliers, as well as extend anti-distributed denial-of-service (DDoS) protection for key public institutions and the Polish armed forces.

In 2025, Poland continued its efforts to raise cyber-awareness, in particular in public administration. Poland continued the Cybersafe Self-Government project (*Cyberbezpieczny Samorząd*), started in 2023 under the FERC, which aims to increase information security at local government level (PLN 1 318 million by January 2026). It also launched a new initiative, called the Cybersafe Government (*Cyberbezpieczny Rząd*), which rolls out cyber-protection to various government institutions and provides training for managerial and IT staff, with completion expected by June 2026. NASK-PIB[3] also carried out a series of initiatives for improving cybersecurity, which comprised training for prominent

[3] NASK-PIB is a National Research Institute supervised by the Polish Ministry of Digital Affairs, primarily focused on research and development in cybersecurity, ICT, and AI, and on ensuring the security of cyberspace at the national level. It also serves as the national registry for .pl internet domains and runs CERT Polska, which responds to cybersecurity threats.

figures and staff in the state-level administration, local government staff and employees of the National Electoral Office, in total covering nearly 5 000 individuals.

Poland continued its efforts to help businesses improve their cybersecurity, including through the RRP-funded project Enhancing the digital maturity and cybersecurity of companies by providing digital services, taking it beyond the pilot phase in 2025. The first service to be introduced under this project, which analyses digital maturity and cybersecurity, was made available to SMEs on the Biznes.gov.pl website. By the end of 2025, 19 companies had benefited from the service. Furthermore, efforts to promote this service will begin in 2026. Two more services to assist businesses in verifying compliance with the NIS2 and CRA Directives are expected to go online by August 2026. In March 2026, Poland also launched an education campaign intended to cover digital skills in five areas, including the development of cybersecurity knowledge among entrepreneurs and managers (see section on digital skills), while the information and education campaign targeting entrepreneurs launched in October 2025 covers, among other topics, cybersecurity in companies (see section on SMEs).

2025 recommendation on cybersecurity: Continue efforts in cybersecurity to address evolving threats, particularly for enterprises and administration.
Poland made some efforts to address the recommendation through new policy actions in 2025. In particular, Poland made efforts towards strengthening and centralising national cybersecurity coordination. Poland mostly continued implementing its existing measures. However, it also launched a few new measures which were already in the pipeline aimed at increasing cyber awareness at various levels of public administration and assessing cybersecurity in SMEs (e.g. the Cybersafe Government (*Cyberbezpieczny Rząd*) project).

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

In 2025, 50.42% of individuals aged 16-74 had at least basic digital skills after an increase of 6.7% annually since 2023, when the figure stood at 44.3%. This places Poland below the EU average, which rose from 55.56% in 2023 to 60.4% in 2025, reflecting an annual growth rate of 4.3% for the EU. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

Regarding the **gender gap**, Poland registers a disparity of 1.24 percentage points in favour of men, with 51.05% of men possessing basic digital skills compared to 49.81% of women. Nevertheless, this gap is smaller than the EU average which stands at 2.75 percentage points in favour of men. Poland's figures for both genders are below the EU averages of 61.79% for men and 59.04% for women.

The level of education has a significant impact on digital proficiency in Poland. Individuals with no or low formal education have a digital skills attainment rate of 41.82%, which is higher than the EU average of 37.56% for this group. The gap between all individuals and those with low education in Poland is 8.6 percentage points, which is considerably smaller than the EU average of 22.84 percentage points.

In terms of **living areas**, 60.87% of individuals in Polish cities possess basic digital skills, compared to an EU average of 66.5%. By contrast, in Poland's rural areas, 40.97% of individuals have basic digital skills, which is lower than the EU average of 52.83%. The urban-rural gap in Poland is 19.9 percentage points, which is more than the EU average of 13.67 percentage points.

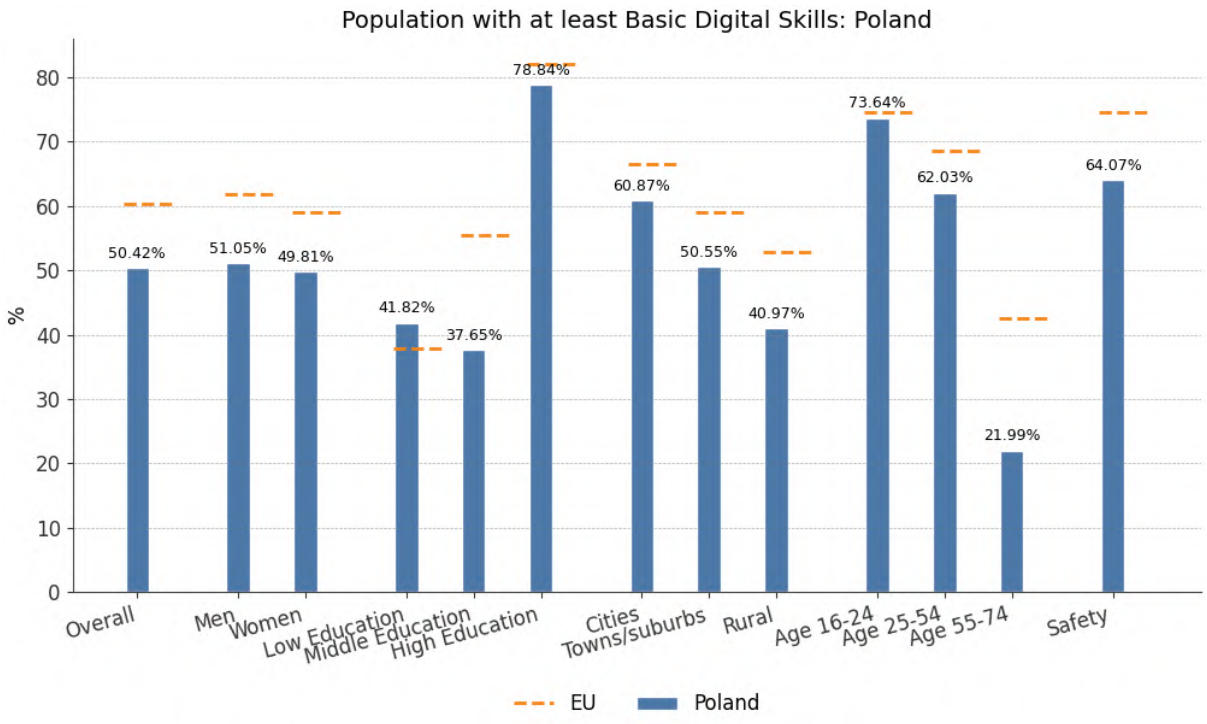
Among **age groups**, young adults aged 16 to 24 in Poland have a digital skills proficiency rate of 73.64%, slightly below the EU average of 74.55%. Among older adults aged 55 to 74, the proficiency rate in Poland is 21.99%, significantly less than the EU average of 42.6%. The gap between young and older adults in Poland is 51.65 percentage points, which is much more than the EU average of 31.95 percentage points.

In terms of **digital safety skills**, 64.07% of individuals in Poland have at least basic safety skills, which is lower than the EU average of 74.63%.

Regarding the **use of generative AI**, 22.68% of people in Poland used it in 2025 for all purposes, which is less than the EU average of 32.66%. Taking only professional purposes into account, 8.36% of people in Poland used generative AI in 2025, compared to an EU average of 15.36%.

According to the Digital Decade Eurobarometer 2026, the main obstacles preventing greater use of generative AI tools are q lack of training or relevant skills (29%), not seeing a need to use generative AI tools (27%) and concerns about ethical use or misuse (24%).

Poland



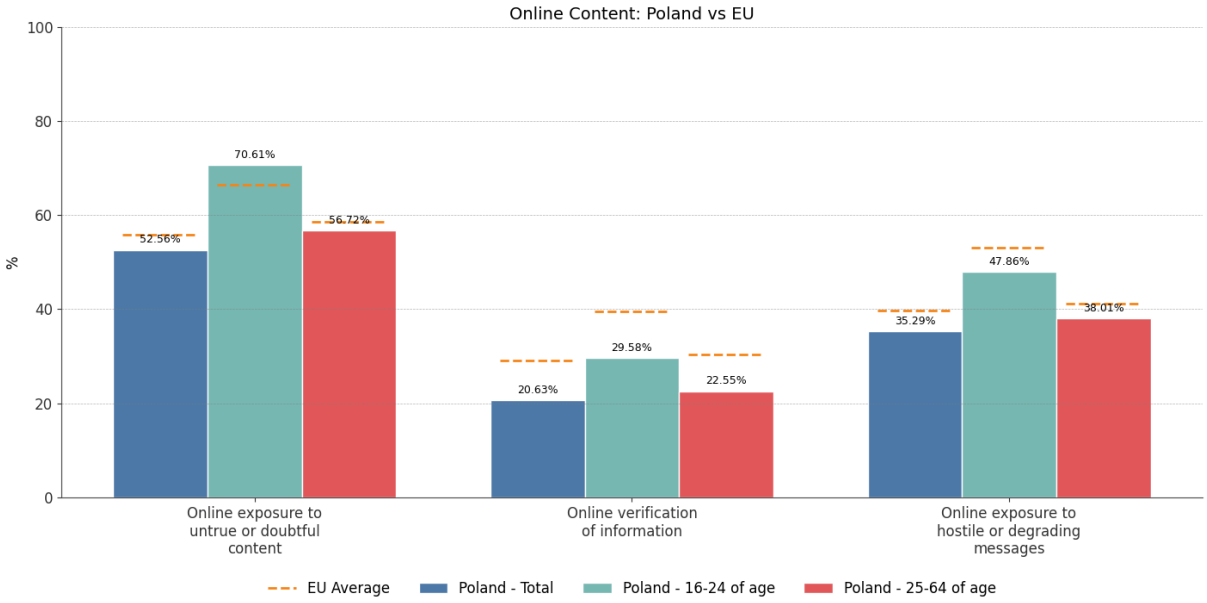
In 2025, 52.56% of individuals in Poland were **exposed to untrue or doubtful content online**, marking an increase of 5.5% annually since 2023, when the figure stood at 47.23%. This puts Poland below the EU average, which rose from 49.25% in 2023 to 55.90% in 2025, with an annual growth rate of 6.5%. Broken down by age group, younger individuals aged 16-24 in Poland reported a higher exposure rate of 70.61% in 2025, up from 61.43% in 2023, reflecting an annual growth rate of 7.2%. This is above the EU average for the same age group, which increased from 61.66% to 66.34% over the same period, with a growth rate of 3.7%. The gap between the younger age group and older adults (25-64) in Poland is 13.89 pp, higher than the EU average gap of 7.77 pp. For older adults in Poland, the exposure rate was 56.72% in 2025, up from 51.2% in 2023, representing an annual growth rate of 5.3%, compared to an EU average of 58.57% in 2025 and 51.7% in 2023, and thus an EU annual growth rate of 6.4%.

Poland reported that 20.63% of individuals **verified the truthfulness of online content** in 2025, an increase of 5.9% annually from 18.4% in 2023. This figure remains below the EU average, which rose from 24.29% in 2023 to 29.16% in 2025, representing an annual growth rate of 9.6%. Among younger individuals aged 16-24, 29.58% verified online content in 2025, up from 25.97% in 2023, representing an annual growth rate of 6.7%, which is in line with the EU average growth rate for this age group. The gap between younger individuals and older adults in Poland is 7.03 pp, smaller than the EU average gap of 9.09 pp. Among older adults aged 25-64 in Poland, the verification rate was 22.55% in 2025, up from 20.19% in 2023, with an annual growth rate of 5.7%, as compared to an EU average of 30.4% in 2025 and 25.18% in 2023, and thus an EU annual growth rate of 9.9%.

35.29% of individuals in Poland were **exposed to hostile or degrading messages online** in 2025, an increase of 8.5% annually from 29.95% in 2023. This is below the EU average, which rose from 33.5% in 2023 to 39.72% in 2025, representing an annual growth rate of 8.9% for the EU. Among younger individuals aged 16-24, the exposure rate in Poland was 47.86% in 2025, up from 41.95% in 2023, representing an annual growth rate of 6.8%, above the EU's growth rate of 5.6% for this age group. The gap between younger individuals and older adults in Poland is 9.85 pp, smaller than the EU average gap of 11.85 pp. For older adults aged 25-64 in Poland, the exposure rate was 38.01% in 2025,

up from 31.74% in 2023, with an annual growth rate of 9.4%, slightly higher than the EU's growth rate of 9.2%.

The data reveals that Poland is consistently below the EU average across all key performance indicators related to online content behaviour. While exposure to untrue or doubtful content and hostile messages is increasing, the rates of verification of online information remain lower than the EU average. Notably, younger individuals aged 16-24 in Poland are more exposed to untrue or doubtful content. However, they are also more likely to verify online content than older adults. Differences between age groups in Poland are generally more pronounced than at EU level, highlighting the need for targeted initiatives to address disparities and improve overall digital literacy and awareness.



According to the **Digital Decade Eurobarometer 2026**, 86% of the Polish population consider that online manipulation (such as disinformation, foreign interference, AI-generated content, deepfakes) poses a threat to the democratic processes. In addition, when asked about online issues with the biggest personal impact on them, Polish citizens highlighted fake news and disinformation (46%, up 14 pp on 2024), hate speech (39%) and insufficient protections for minors (36%). Furthermore, 87% thought strengthening the protection of children and young people online should be a priority for the EU.

Policy context and assessment of the recommendations

In 2025, Poland continued implementing 28 initiatives under its national Digital Competence Development Programme until 2030 (*Program Rozwoju Kompetencji Cyfrowych*), which includes actions by many different state entities. A revision of the Programme is ongoing and expected to update existing measures and introduce new ones, including several that already started to be implemented in 2025. One of the flagship initiatives under the Programme are the Digital Development Clubs (Kluby Rozwoju Cyfrowego) financed under the European Funds for Social Development (*Fundusze Europejskie dla Rozwoju Społecznego – FERS),* aimed at improving digital skills at the local level. In 2025 the project has started operating in its pilot phase, with about 1 200 people trained in 40 Clubs. Wider implementation of the initiative is planned as of late 2026, with PLN 976 million to support its scaling phase and ambitious plans to establish 2066 Clubs and train 450 000 adult citizens by the end of 2028.

Poland has strengthened efforts to raise awareness of existing initiatives. The kompetencjecyfrowe.gov.pl portal is intended to serve as a one-stop-shop for comprehensive information on digital skills initiatives and available training, courses and conferences. In February 2026 Poland launched a large-scale media campaign Build your digital form click by click (*Buduj cyfrową formę klik po kliku*) to promote digital skills development and ICT education. The campaign consists of 5 areas: (1) general digital skills; (2) digital professional skills; (3) ICT careers and education; (4) women in ICT; (5) cyber security awareness among entrepreneurs and managers.

Raising the level of digital skills will be key to countering evolving cyber threats and disinformation. Recent incidents such as the violation of Polish airspace by Russian drones and the attempted sabotage of a railway line, together with online disinformation campaigns, have highlighted the need to counter a sharp rise in Foreign Information Manipulation and Interference (FIMI). In this context, it is particularly concerning that the level of verification of online information among all age groups in Poland is below the EU average. Various Polish state entities are working on countering disinformation. In this context, the Interministerial Group for Counteracting Foreign Information Manipulation and Interference, established by the Prime Ministerial Regulation of April 2025, serves as a cross-governmental platform for aligning the activities of relevant ministries and agencies. Still, the institutional landscape remains fragmented, and both the Ministry of Digital Affairs and the Ministry of Foreign Affairs are taking further steps to improve coordination and strategic coherence of efforts countering disinformation, in line with a whole-of-government approach.

2025 recommendation on basic digital skills: Increase the attractiveness of STEM disciplines at school to raise interest in taking up ICT-related studies and careers, including by girls and women. Strengthen the measures focused on social groups with lower digital skills, such as older adults, inhabitants of rural areas, and people with disabilities.
Poland made some efforts to address the recommendation through new policy actions in 2025. Poland has launched a new initiative aiming to raise interest in taking up ICT-related studies and careers, including among girls (see section on ICT specialists). Poland continued implementing measures under the Digital Competence Development Programme, with nearly 400 000 people trained by August 2025 since the programme's launch. In 2025, Poland has also reduced the level of ambition of digital trainings (including for vulnerable groups) to be completed by June 2026 under its RRP, due in part to the lower-than-expected level of interest in training among target groups, with close to 97 000 citizens trained by 2025. The flagship Digital Development Clubs initiative is expected to raise the level of digital skills, including among older adults and in rural areas, but wider implementation has yet to start.

ICT specialists

Performance assessment

In 2025, ICT specialists represented 4.5% of total employment in Poland (2030 national target 6% vs the EU target of 10%), a share unchanged since 2024 and below the EU average of 5.0%. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

A concerning trend has been observed in the share of women working as ICT specialists in Poland. In 2023, the share of female ICT specialists in Poland was around the EU average (19.1% vs an EU average of 19.4%), however by 2025 this figure had dropped to an estimated 16.6%, putting Poland below the EU average in 2025 of 19.5%. This suggests that Poland is not effectively retaining or attracting female talent in the ICT sector.

Poland

In 2024, Poland was one of the Member States with the lower share of ICT graduates (5.1% of all graduates). This is cause for concern since a low share of ICT graduates limits the talent pipeline, making it more difficult to sustain and grow the workforce of ICT specialists.

In 2024, 5.6% of Polish enterprises recruited or tried to recruit personnel with ICT specialists' skills (EU average: 9.55%).

Policy context and assessment of the recommendations

Poland is taking measures to strengthen STEM education in schools, including among girls, with a view to developing IT talent in the long term. In 2025, Poland continued implementing its 2019-2029 Programme for the Development of IT Talent which helps gifted students develop their programming skills. 2 249 school students participated in the programme in 2025. The national research institute NASK-PIB launched a new initiative, called the Digital Opportunities Club 2025-2029 (Klub Cyfrowych Możliwości), which offers schoolchildren, in particular girls, free courses in programming, robotics, AI and online safety, taught by female university students enrolled in ICT courses. In addition, by 2029 Poland is expecting to train more than 100 000 schoolteachers in digital skills, including AI and STEM (PLN 91 million in EU funding).

Highly qualified specialists will be crucial in the context of Poland's ambitions in the development of critical technologies, as well as the increasing number of cybersecurity incidents. The importance of ICT talent is recognised in Poland's draft State Digitalisation Strategy and in its draft strategies for the semiconductor, AI and quantum sectors, which set the broad goal to increase the number of ICT specialists to meet a projected increase in demand. The evolving cyber threat landscape also underscores the need to maintain trained staff in both public administration and the private sector (see section on cybersecurity).

2025 recommendation on ICT specialists: Take measures to increase the number of ICT specialists (e.g. improved training and reskilling options; incentive schemes to attract new / retain current ICT specialists, including specialists from other countries) and continue promoting ICT studies and careers to women and girls.
Poland made some efforts to address the recommendation through new policy actions in 2025. Poland continued implementing existing measures such as the training of digital accessibility specialists (financed under the FERS programme), with 1 022 individuals trained by the end of 2025 out of the total 2 200 expected by 2028. In 2025, the National HPC Competence Centre continued to organise educational events and training courses for users of different levels of expertise. Regarding the promotion of ICT studies and careers among women and girls, Poland continued the implementation of existing measures, such as the Women in ICT initiative included in the national roadmap, which improved the advanced digital skills of 1 414 women in 2025 (PLN 5 million grants). Moreover, Poland launched a new initiative, called the Digital Opportunities Club (see above). In addition, one of the pillars of the large-scale RRF-funded media campaign Build your digital form click by click launched in February 2026 is aimed at promoting the attractiveness of ICT education and careers, including among girls and women. An European Technical Support Instrument (TSI) project Improving girls' and women's interest and participation in ICT in Poland | OECD launched in October 2025 is expected to identify reasons for female underrepresentation in ICT and offer recommendations to increase participation.

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

Performance assessment

In 2025, Poland's total digital public services score for citizens (which covers both national and cross-border users) was 83.93/100. **This represents a 18.7% increase compared to 2024. As such, Poland is below the EU average of 84.64/100**. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap. Specifically in terms of digital public services for national citizens, Poland scored 97.14/100 in 2025. This is above the EU average of 94.01/100 and marks a 5.8% compared to 2024. In terms of cross-border digital public services for citizens, Poland scored 70.71/100 in 2025 representing a 42.6% increase on 2024, but below the EU average of 75.28/100.

Poland's total digital public services score for businesses (covering both national and cross-border businesses) was 88.75/100 in 2025, just above the EU average of 88.59/100. **This represents a 4.4% increase compared to 2024**. The country is on track according to its trajectory presented in the Digital Decade national roadmap. The business-related life event for which Poland scored the highest was regular business operations (95.0), whereas the life event which had the most room for improvement was business start-up (82.5). Poland's cross-border digital public services score for businesses reached 77.50/100 in 2025, representing a 10.7% increase compared with 2024, but was below the EU average of 78.37/100. By contrast, Poland's score for digital public services for businesses available to national users was 100.0/100, unchanged since 2024 and putting the country above the EU average of 98.81/100.

In terms of auxiliary e-government indicators, Poland scored well on mobile friendliness (96.67 compared to an EU average of 97.35), transparency of service delivery, design and personal data (77.74 vs EU average of 69.59), availability of pre-filled forms (87.97 vs EU average of 75.93) and user support for national services (100 vs EU average of 96.06). However, user support for cross-border services was lagging behind (70.37 vs the EU's 83.95), as was the share of internet users interacting with eGovernment services, which remains below the EU average (67.5% vs EU average of 76%).

In terms of access to e-Health records, Poland scored 91.82 (2030 national target of 100), unchanged since 2024 and above the EU average of 86.51. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

According to the Digital Decade Eurobarometer 2026, **84% of the Polish population believe digitalisation of daily public and private services is making their life easier**, which represents an increase of 6 pp compared with 2025 and is above the EU average of 73%.

Policy context and assessment of the recommendations

Poland's electronic identification infrastructure is relatively mature and offers citizens three means of electronic identification: the Trusted Profile (Profil Zaufany), the personal profile/electronic ID card (profil osobisty/e-dowód), and the mObywatel profile (not notified under eIDAS). The mObywatel ecosystem is a flagship project enabling access to a wide range of public e-services via the mObywatel 2.0 mobile application, which in 2025 had 11.5 million users. In 2025, several new features were added to the application, including the possibility to request an ID card online, report the loss of a passport, and complete formalities after a road collision (mStłuczka). The draft State Digitalisation Strategy sets out a vision for all key public services to be available via the mObywatel ecosystem by 2035. The application also functions as a digital wallet, notably for the mDowód digital identity document, which had 10.9 million users in 2025 (up by 2.4 million users since 2024). While mDowód is separate from

the physical eID card (e-dowód) and is currently valid only in Poland, the authorities plan to align mObywatel with the EU Digital Identity Wallet standards.

Poland is making progress on the development of the EU Digital Identity Wallet and has continued participating actively in several large-scale pilots (LSPs) designed to test use cases. As part of the POTENTIAL LSP, which ended in September 2025, Poland tested four of six use cases (eGovernment, eSIM registration, mobile driving licence and ePrescriptions). Since October 2025, Polish stakeholders have also been involved in the new APTITUDE LSP, testing three of four use cases for the EU Digital Identity Wallet, namely digital travel credentials, mobile vehicle registration certificates, and payments and banking, including cross-border and cross-sector environments. The national legal and organisational framework is also being updated to support implementation. However, while a Conformity Assessment Body has been identified, the certification and accreditation framework is not yet fully operational.

Digital public services for citizens and businesses are continuing to expand. In 2026, the e-Delivery (eDoręczenie) system became fully mandatory for all public entities following a transition period in 2025, obliging them to issue digital equivalents for all registered paper letters. The e-Delivery system has been integrated notably with the Entrepreneur's Account (Konto Przedsiębiorcy) in the Biznes.gov.pl portal, a website intended by the Polish authorities as a one-stop-shop providing comprehensive information and services for entrepreneurs. Similarly, it became mandatory for all businesses to use the system of structured e-invoices registered in the national e-invoicing system (Krajowy System e-Faktur, KSeF), introduced in 2022. Furthermore, the e-Tax Office (e-Urząd Skarbowy), which the Polish authorities consider a flagship initiative for the digitalisation of public administration under the Polish RRP, has expanded the range of services available to individuals and organisations, and a new mobile application has been introduced.

In 2025 Poland adopted an amendment to the Act on the Computerisation of the Operations of Entities Performing Public Tasks (*ustawa o informatyzacji działalności podmiotów realizujących zadania publiczne*), with the aim of better coordinating digitalisation efforts in Poland, in particular in public services. The Act introduces, among all: a legal basis for the creation of a Committee on Digitalisation to ensure coordination and efficient decision-making; minimum requirements for public registers with the view of developing solutions in the area of national and European interoperability; the appointment of plenipotentiaries for digitalisation in ministries who will be responsible for the implementation of the upcoming state informatisation strategy and for identifying where there are needs for new digital technologies and skills in a given office.

Poland is developing innovative digital solutions for its public administration. These include a Polish national large language model PLLuM, already being used in the mObywatel application to operate a live AI-based virtual assistant, with more pilot implementations to come. The draft AI strategy (see section on Artificial Intelligence) also foresees the establishment of the AI HUB Poland platform, which will become the central mechanism for coordinating AI roll-out in the public sector, supporting knowledge exchange, process standardisation, and digital project management. According to the draft AI Policy, by 2030 most key public services will be based on AI solutions, which is expected to lead to increased transparency in institutional operations, reduced administrative burdens and faster service delivery for the general public.

Polish citizens can access their healthcare records through an online account, the Internetowe Konto Pacjenta (IKP) and the mojeIKP app, which now act as the main gateway for patients to access and share health information and services, with around 20 million active users by the end of 2025. In

January 2026, a centralised e-registration was made available for selected healthcare services, including mammography, cytology and cardiology, with more services due to be added in the future. The Polish authorities plan to step up work on cross-border e-health services in 2026, including the Patient Summary project, which will enable critical patient medical information to be exchanged across countries. Work is also ongoing to ensure compliance with the requirements of the European Health Data Space (EHDS). In addition, in 2026, the development of cybersecurity was identified as a major priority, including through the expansion of CSIRT CeZ, which is responsible for monitoring threats, responding to incidents and building the resilience of the e-health system.

Leveraging digital transformation for a smart greening

In Poland, the ICT sector generates higher air emissions than the EU average, however recycling of electronic equipment is widespread. Sectoral data on air emissions show that the ICT sector in Poland emitted 29.7 kg CO_2 per capita, as compared to an EU average of 22.8 kg CO_2 per capita. Nearly all these emissions are attributed to ICT services activities (97.5%). Nevertheless, the ICT sector accounts for only 0.31% of air emission in the total economy, slightly below the EU average (0.35%). Furthermore, 95.19% of ICT-related waste collected (corresponding to two categories of waste electrical and electronic equipment) were recycled or prepared for reuse in 2023, above the EU average of 80.23%, thus making Poland one of the EU's top performers in this regard.

According to the Digital Decade Eurobarometer 2026, **72% of the Polish population believe that AI should be developed as a priority in an environmentally sustainable way** (e.g. using renewable and clean energy). In addition, 45% consider green digital technologies (e.g. energy-saving tech) as the technology with the most positive impact in the next ten years.

The Polish authorities recognise that the digital and green transitions are interlinked and have integrated this as a separate thematic area in the draft State Digitalisation Strategy. The strategy broadly outlines Poland's intentions to assess and mitigate the environmental impact of ICT solutions in public administration, establish principles for sustainable ICT development within public bodies, promote the adoption of energy-efficient solutions by telecommunications operators, and encourage data centre operators to implement the best practices set out in the EU Code of Conduct on Date Centre Energy Efficiency.

In 2025, the Ministry of Climate and Environment took measures to support the digital and green transitions, including obtaining access to a professional automotive market database managed by the Institute for Automotive Market Research SAMAR. This was fed into efforts to establish an analytical foundation to enable the effects of electromobility and energy efficiency programmes to be monitored.

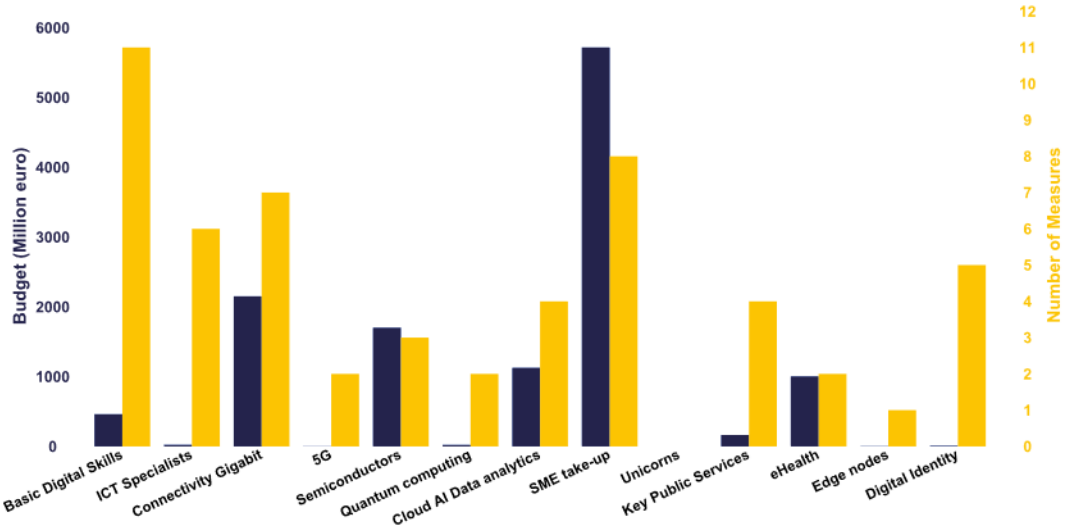
2025 recommendation on green: Develop a system for monitoring and quantifying the emission reductions of the digital solutions deployed.
No information available on measures taken to address the recommendation. Poland plans to adopt a more comprehensive approach to addressing the twin digital and green transitions, including by introducing a mechanism for monitoring the carbon footprint generated by digital solutions used in public administration.

Annex I: National roadmap analysis

[Poland's national Digital Decade strategic roadmap]

Poland adopted its national Digital Decade roadmap on 22 October 2024. Polish authorities have yet to submit the adjustments to the roadmap. They declared their intention to do so, in line with article 8 (3) of the decision establishing the Digital Decade Policy Programme, but at time of writing neither the formally endorsed document nor its draft has been shared with the Commission.

Measures and budget in the national roadmap[4]



The roadmap includes 55 measures, with a total value of almost EUR 12.4 billion (about 1.5% of GDP). They cover all Digital Decade targets, but some measures are deemed to contribute to more than one target (e.g. measures related to digitalisation of businesses), making precise attribution difficult. The roadmap also lists measures relating to general objectives, but without providing information about their budget or timing.

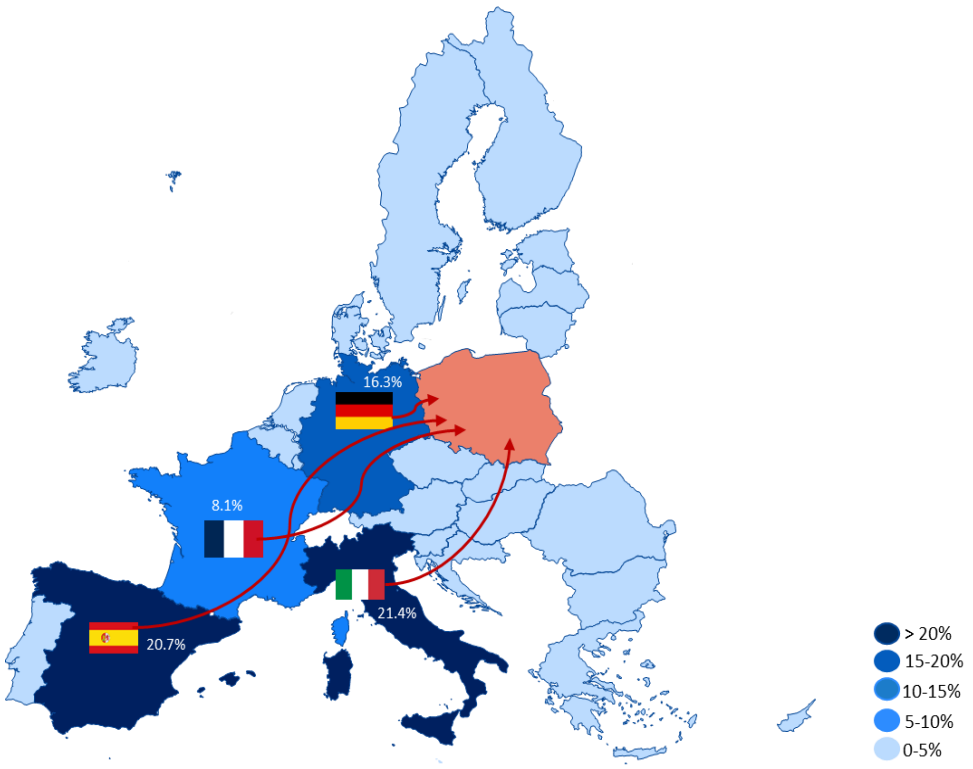
[4] When referring to national roadmaps, data used in this report are those declared by the Member States in their national roadmaps, on the basis of the Commission's guidance (C(2023) 4025 final). Data might reflect possible variations in reporting practices and methodological choices across Member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

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

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

A modelling study conducted by the European Commission services, with the FIDELIO model, assesses the economic impact of the digital component of the RRF. As of November 2025, the digital part of the Recovery and Resilience Plan of Poland was estimated to EUR 7.25 billion with EUR 1.26 billion for digital infrastructures, EUR 1.97 billion for digital skills, EUR 1.48 billion for the digitalisation of businesses, EUR 1.50 billion for the digitalisation of public services, and EUR 1.04 billion for other digital priorities.

The total economic impact of RRF digital measures is estimated to EUR 8.04 billion for the national economy. Of this, EUR 5.78 billion stems from the direct effects of Poland's own RRP and EUR 2.26 billion corresponds to spillover effects from the implementation of other EU Member States' plans. Poland benefited the most from spillover effects from RRPs of Italy (EUR 483 million), Spain (EUR 468 million), Germany (EUR 368 million). The most impacted sectors are ICT Services (EUR 1.68 billion), Manufacturing (EUR 1.51 billion), and Construction (EUR 1.46 billion).



RRF spillover effects to Poland

Poland

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

Poland allocates 21.3% of its total recovery and resilience plan to digital (EUR 7.3 billion)[5]. In addition, under cohesion policy, EUR 5.8 billion, representing 8% of the country's total cohesion policy funding, is dedicated to advancing Poland's digital transformation[6].

Multi-Country Projects

Poland is a member of the Alliance for Language Technologies EDIC, of the EUROPEUM EDIC, and of the IMPACTS EDIC and is an observer to the Digital Commons EDIC. It is also participating as observer in the consortium that aims to set up an EDIC in the area of cybersecurity skills. Poland is directly participating in the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT) and in the IPCEI on Next Generation Cloud Infrastructure and Services (IPCEI-CIS). Poland is also 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.