



Establishing the Best Foundation for Europe's Digital Decade: GIGAEurope's vision for the 2024-2029 mandate

Europe's competitiveness depends on a successful digital transformation. This requires future-oriented regulatory policies that acknowledge connectivity's central role in the digital value chain.

The transformative power of advanced Gigabit and 5G connectivity plays a decisive role in asserting Europe's competitiveness in the global economy. Integration of digital technologies across the broader EU market will be a key agent of growth. Digitalisation facilitates job creation and upskilling. Companies investing in data-driven innovation enjoy higher efficiency and productivity. A digitalised Europe is vital to a smarter, more efficient, safer, and cleaner society.¹

Continuing to roll out cutting-edge networks across the EU requires significant investment. **The European Commission Report on the State of the Digital Decade estimates that total required investment is likely greater than €200 billion.** As industrial use of connectivity rises, security needs will increase and become more complex. This requires greater investment. Companies participate in a tightly regulated market where competition has continuously lowered the price of services for European customers – even as demand for data and the cost of providing ultra-fast, intelligent networks are increasing. It is crucial that connectivity providers have the legal certainty to innovate and explore new business models (such as network-as-a-service) to support future investments. Fragmentation and legally uncertain policy frameworks hinder investment, stunt innovation, and prevent the development of a true EU Digital Single Market. Furthermore, consolidation that fosters necessary scale is a prerequisite to future-proofing the industry.

Call to action: In the anticipated Digital Networks Act, connectivity providers should be recognised as proactive and willing contributors to Europe's digital ecosystem. **GIGAEurope calls for:**

- Harmonised spectrum management policies to ensure consistent licensing terms that support ongoing investment incentives.
- A more practical approach to consolidation that fosters a holistic assessment of all (static and dynamic) factors.
- Regulatory frameworks that are flexible enough to allow for new applications and innovation, focusing on the benefit of customers.
- A technology neutral approach that leverages the positive dynamics of infrastructure competition between all future-proof technologies. This is the most effective path to full Gigabit coverage.

The telecommunications sector is rolling out more sustainable and secure networks that enable Europe's green transition and foster resilience. Companies are doing so with their own Net Zero targets in mind.

Building resilience and having the ability to withstand and emerge even stronger after socioeconomic and environmental shocks will be paramount during the 2024-2029 mandate. Gigabit and 5G technologies will be key to managing the ICT industry's overall energy usage and carbon footprint, while enabling transformative decarbonisation initiatives for other sectors.

¹ [Long-term competitiveness of the EU looking beyond 2030](#), European Commission, March 2023.

The evolution of connectivity itself also encompasses significant sustainability enhancements. **The transition to 5G technology brings about a remarkable 90% increase in energy efficiency when compared to earlier generations of mobile networks.**²



Improving resistance to cyberattacks and building related knowledge and competencies will also be key components of a resilient EU economy. As the world becomes more connected and digitalised, a new sense of strategic vulnerability arises. Operators are under acute pressure to maintain network resilience.³ While increased cybersecurity is an asset for Europe, it comes with a substantial cost that needs to be accommodated.

Call to action: If Europe is to become the first carbon-neutral continent, and secure its networks, Gigabit and 5G network deployments need to be significantly ramped up and new energy-saving technologies utilised at scale. **GIGAEurope calls for:**

- Reducing the time and cost of rolling out Gigabit and 5G connectivity, by ensuring a fast and effective implementation of a robust Gigabit Infrastructure Act.
- More harmonised incident and vulnerability assessment and risk management measures to increase common response capabilities to threats such as cyberattacks, natural disasters or energy blackouts.
- Supportive policy frameworks that crowd in private investment as telecommunications companies work to provide even more sustainable and secure networks.

Unlocking the full socioeconomic potential of the EU's digital transformation means adopting an inclusive, user-centric mindset that proactively promotes a digitally engaged culture.

Smart homes and cities, digital twins, precision agriculture, connected cars, remote surgery, and other advanced applications promise to transform our learning, entertainment, work, transport, and health experiences.

We must maintain a growth mindset on the key Digital Decade policy pillars that drive digital adoption. Unlocking the full potential of an integrated market will require greater uptake of digital solutions by EU citizens and businesses. **The Digital Decade Programme sets a 75% target for technology uptake by enterprises. Recent EU projections for 2030 suggest that only 66% of businesses will adopt cloud services, 34% will engage with big data, and 20% will implement AI.**⁴

Call to action: Our vision is to offer developers the best internet service to build, test, and bring their innovations to an active market. Ensuring that no technology passes Europe by. **GIGAEurope calls for:**

- Ongoing digital literacy initiatives building on the important actions around the Year of Skills.
- Incentives to foster the uptake of emerging digital technologies by industry verticals, SMEs, and individual users.
- EU policies to attract, build and retain ICT talent pools in Europe.

Use the QR code below to visit our website and learn more about GIGAEurope's priorities



² [Connecting a Sustainable Future](#), EY report, June 2022.

³ [Gartner Top Security and Risk Trends in 2022](#).

⁴ [2023 Report on the State of the Digital Decade](#), European Commission, September 2023