

# Report on the State of the Digital Decade 2024

## Annex - Short Country Report 2024

**France**

## Executive summary

**France brings a positive contribution** to the European Union's (EU) Digital Decade objectives and targets, in view of a successful digitalisation that fosters competitiveness, resilience, sovereignty, European values and climate action.

In 2023, France made notable **progress** in **e-health** and rolling out its **fibre network**. However, **important challenges** persist in the **digitalisation of SMEs** and the **adoption of advanced technologies** (such as AI and cloud) by enterprises.

**Digitalisation is a priority for the French authorities with an emphasis on infrastructure and research and development (R&D) in key technologies.** Under its investment plan 'France 2030', France is investing massively in research and innovation in new technologies such as cloud, cybersecurity, Artificial Intelligence (AI), and quantum. The production of semiconductors on the national territory is also given a top priority. France also benefits from robust digital infrastructures. Although its digitalisation policies cover a broad range of areas, there is scope to improve several metrics related to the general population of citizens and enterprises. According to the **special Eurobarometer survey on the 'Digital Decade 2024'**<sup>1</sup>, only 64% of the French population consider that the digitalisation of daily public and private services makes their life easier, one of the lowest scores in the EU.

France is hosting the **European Digital Infrastructure Consortium (EDIC) ALT-EDIC** (already set up), which addresses the scarcity of European language data needed for AI solutions, and is candidate to host two more EDICs, both in the making: Agrifood EDIC and (along with The Netherlands) and Digital Commons EDIC. France is also a member of the Local Digital Twins towards the CitiVERSE EDIC (already set up). In addition, France is developing the Statute of the possible future Mobility and Logistics Data EDIC and the Genome EDIC<sup>2</sup>.

France allocates 21.6% of its total Recovery and Resilience plan to digital (EUR 8.1 billion)<sup>3</sup> with the priorities given to e-Health and R&D in key technologies (5G, quantum, and cloud). Under Cohesion Policy, an additional EUR 1.9 billion (11% of the country's total Cohesion Policy funding) is allocated to the country's digital transformation<sup>4</sup>.

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<sup>1</sup> Special Eurobarometer 551 on 'the Digital Decade' 2024: <https://digital-strategy.ec.europa.eu/en/news-redirect/833351>

<sup>2</sup> Information last updated on 31 May 2024.

<sup>3</sup> The share of financial allocations that contribute to digital objectives has been calculated using Annex VII to the Recovery and Resilience Facility Regulation.

<sup>4</sup> This amount includes all investment specifically aimed at or substantially contributing to digital transformation in the 2021-2027 cohesion policy programming period. The source funds are the European Regional Development Fund, the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.

Digital Decade KPI <sup>(1)</sup>	France			EU		Digital Decade target by 2030	
	DESI 2023	DESI 2024	Annual progress	DESI 2024 (year 2023)	Annual progress	FR	EU
Fixed Very High-Capacity Network (VHCN)	73.4%	81.4%	10.9%	78.8%	7.4%	100%	100%
Fibre to the Premises (FTTP) coverage	73.4%	81.4%	10.9%	64.0%	13.5%	x	-
Overall 5G coverage	88.8%	93.2%	4.9%	89.3%	9.8%	100%	100%
Semiconductors		NA					
Edge Nodes		257		1 186		x	10 000
SMEs with at least a basic level of digital intensity	47.0%	52.0%	<sup>(2)</sup>	57.7%	2.6%	90%	90%
Cloud	25.3%	22.9%	<sup>(2)</sup>	38.9%	7.0%	53.3%	75%
Artificial Intelligence	6.7%	5.9%	<sup>(2)</sup>	8.0%	2.6%	46.7%	75%
Data analytics	NA	33.9%	NA	33.2%	NA	49.7%	75%
AI or Cloud or Data analytics	NA	44.9%	NA	54.6%	NA		75%
Unicorns		40		263		100	500
At least basic digital skills	62.0%	59.7%	-1.9%	55.6%	1.5%	80%	80%
ICT specialists	4.3%	4.7%	9.3%	4.8%	4.3%	10%	~10%
e ID scheme notification		Yes					
Digital public services for citizens	71.3	72.1	1.1%	79.4	3.1%	100	100
Digital public services for businesses	79.3	79.3	0.0%	85.4	2.0%	100	100
Access to e-Health records	54.5	79.3	45.5%	79.1	10.6%	100	100

<sup>(1)</sup> See the methodological note for the description of the indicators and other descriptive metrics

<sup>(2)</sup> Comparison with previous years cannot be done for France due to methodological changes.

## National digital decade strategic roadmap

With respect to **France's** contribution to the Digital Decade reflected in its roadmap, it is demonstrating **a high ambition** and, based on this document, intends to allocate **some effort** to achieve the Digital Decade objectives and targets.

**Overall, France's roadmap is ambitious and consistent including on objectives but with some weaknesses in the digitalisation of enterprises.** France's national roadmap includes 2030 targets for all KPIs except for **FTTP and edge nodes** (the former is assumed to be similar to VHCN but needs formalisation). In total, 9 national targets are aligned with EU 2030 targets, but 3 are below: **take up of AI, take up of data analytics and take up of cloud**. Trajectories are missing for **FTTP, edge nodes and unicorns**. The roadmap covers all objectives of the Digital Decade such as a human-centred digital space, resilience and security, sovereignty, green, and protection of the society with a high level of ambition, especially on the human centred digital space, on sovereignty, and on the green transition.

The total budget of the measures (public and private) presented in the roadmap is **estimated to EUR 17.8 billion** (about 0.6% of GDP) with the priorities being semiconductors, connectivity, and e-Health. Some aspects require more action, especially regarding ICT specialists to double the current number of ICT professionals and for the digitalisation of enterprises (both in terms of basic digital intensity and the rate of adoption of advanced technologies).

## Recommendations for the roadmap

France should, when submitting adjustments to its national roadmap in accordance with Article 8(3) of the Digital Decade Policy Programme (DDPP) Decision:

- **TARGETS:** (i) Provide a target and trajectory for **edge nodes**, design a trajectory for **unicorns**, and formalise the trajectory for **FTTP**; (ii) Consider aligning **the level of ambition of targets for the 3 technologies take-up by enterprises (AI, cloud, data analytics) to the EU's targets**.
- **MEASURES:** (i) Strengthen the measures contributing to targets that are the most difficult to achieve, especially as regards **skills and digitalisation of enterprises**; (ii) Review the budget description of all presented measures, duly highlighting EU sources such as Recovery and Resilience Facility (RRF); (iii) Provide **more information on the implementation of digital rights and principles** (and Digital Decade general objectives), including what national measures contribute to it.
- **CONSULTATION:** Report on the consultation of stakeholders in the roadmap. .

## Digital rights and principles

The Special Eurobarometer 'Digital Decade 2024' provides insights into French perceptions of digital rights. Although 39% of French respondents believe the EU protects their digital rights effectively, this marks a decrease and is below the EU average of 47%. Concerns have intensified, with 52% worried about children's online safety and 45% about control over personal data, reflecting growing unease. On a positive note, 85% value digital technologies for connecting with friends and family, and 82% for accessing public services, indicating strong appreciation for digital advancements. The monitoring of the Declaration on Digital Rights and Principles shows that increasing the profile of the Declaration at national level and fostering better stakeholder engagement could help improve outcomes in the years to come<sup>5</sup>.

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

**To underpin its technological leadership and competitiveness, France is equipped with good infrastructures with a positive deployment dynamic but should boost the digitalisation of its businesses.** On infrastructures, France is on track to reach 100% coverage for VHCN (+3.5 million fibre connections in 2023) and 5G for 2025, 5 years earlier than the EU target. France shows the highest share of fixed broadband subscriptions with speed > 1 Gbps in the EU with 51.6%. This is mainly due to the successful roll-out of the fast broadband plan 'France très haut débit', the choice of FTTH as the leading technology, and the French appetite for high-speed broadband. 5G coverage stands at 93.2% with 64.8% of French households covered by the 3.4-3.8 GHz band, an essential band for enabling advanced applications requiring large spectrum bandwidth. Several calls for projects were launched to develop industrial 5G and the 26GHz band has been open since 2019 for experimentation purposes. However, the indicators on the digitalisation of enterprises (basic intensity of SMEs and take-up of data analytics, AI, and cloud) all point to a performance below the EU average. Although France hosts some innovative frontrunners (including dynamic start-ups), as a whole, the global business sector

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<sup>5</sup> See SWD 'Digital Decade in 2024: Implementation and perspective' with annexes, SWD(2024)260: <https://digital-strategy.ec.europa.eu/en/news-redirect/833325>, Annex 4.

underperforms on digitalisation. France has made digital sovereignty a priority by, for example, increasing the production of semiconductors and is developing sovereign solutions in AI, cloud, quantum, and cybersecurity. On AI, a national commission recently released [a report](#) guiding the future actions of the government. The national cybersecurity strategy will be updated in 2024 with a focus on skills.

## Recommendations – France should:

- **CONNECTIVITY INFRASTRUCTURE:** Ensure sufficient access of new players to spectrum for innovative business-to-business (B2B) and business-to-consumer (B2C) applications and encourage operators to speed up the deployment of 5G stand-alone core networks.
- **CYBERSECURITY:** (i) Continue efforts in cybersecurity to address evolving threats and restore the confidence of enterprises and general public; (ii) Continue the implementation of the 5G Cybersecurity Toolbox to ensure secure and resilient 5G networks.
- **SMEs:** Set up additional measures and increase resources for existing schemes to improve the SMEs digitalisation performance and to further leverage the impact of the European Digital Innovation Hub in regions and its close presence to regional ecosystems, paying special attention to its outermost regions.
- **AI/CLOUD/DATA ANALYTICS/EDGE NODES:**
  - o (i) Review the mix of measures to support the adoption of advanced digital technologies (with a particular attention to AI and cloud). Foster the creation of local ecosystems to allow technologies (AI, cloud, data analytics) and best practices to diffuse across the broader business sector. Build on the recent national AI Commission report to design new measures to develop the AI ecosystem and foster related technologies adoption by enterprises.
  - o (ii) Ensure the broad uptake of the next generation of cloud infrastructure and services under development in the IPCEI-CIS by companies of all sizes, including by developing a country-specific dissemination strategy (complementing what has already been committed under IPCEI-CIS); contributing to the additional dissemination activities led by the Cloud IPCEI Exploitation Office.
  - o (iii) Consider measures specific to edge nodes deployment, supplementary to the IPCEI-CIS participation.

## Protecting and empowering EU people and society

**France is well equipped to deliver an inclusive digital transition, but it will require sustained efforts to continuously increase the level of digital skills of the population and train ICT specialists.** The level of digital skills of the population is still slightly above the EU average, with a slight decrease compared to last year's report, possibly due to post-COVID-19 effects (i.e., lower usage of ICT tools). Over the last years, France has integrated digital skills in curricula at different stage. In 2023 it also announced measures to strengthen the basic education (especially in mathematics) and boost the attractiveness of science, technology, engineering, and mathematics (STEM). This could increase the number of young people embarking on a digital career in the future. The proportion of ICT specialists (4.7%) in employment is broadly in line with the EU average and in strong progress. However, it will require sustained action to reach the EU and national Digital Decade targets given the relatively slow change in population indicators. The digitalisation of public services will require acceleration as France is

slightly below the EU average. France improved its overall e-Health maturity score from 54.5 in 2022 to 79.3 in 2023. In February 2024, the authorities launched 'France Identité', a companion application enabling e-ID users to authenticate and access digital ID services. France has a long history of prioritising inclusiveness in designing policies. Digitalisation is current practice with measures in place to narrow the geographical divides and the gender gap and to reduce digital illiteracy.

## Recommendations – France should:

- **BASIC DIGITAL SKILLS:** Take measures to boost the digital skills of the population on the shorter term, with additional efforts in its outermost regions.
- **ICT SPECIALISTS:** (i) Increase the attractiveness of STEM disciplines at school to boost the number of young people, including girls, interested in taking up ICT-related studies or careers; (ii) Increase the visibility and readability of training and reskilling options. Design incentive schemes to attract and retain ICT specialists.
- **KEY DIGITAL PUBLIC SERVICES:** Make efforts to digitalise public services, with particular attention to re-use of information available to public administrations and user support.
- **E-HEALTH:** (i) Make all data types available to citizens through the online access service; (ii) Enhance the authentication method for logging in to the online access service by using a (pre)notified e-ID; (iii) Introduce a legal basis and provide the technical functionality for authorised persons to access electronic health data on behalf of others.

## Leveraging digital transformation for a smart greening

**France emerges as an EU leader in its ability to create links between the digital and green transitions.** It is at the forefront in monitoring the footprint of the ICT sector and in promoting energy sobriety and the eco-design of ICT equipment and services. During the French presidency of the EU, France drafted a joint declaration on the dual digital and environmental transition, signed by 22 Member States.

## Recommendations - France should:

- Develop a coherent approach to twinning the digital and green transitions. First, promote improvements in energy and material efficiency of digital infrastructures, in particular data centres. Second, support the development and deployment of digital solutions that reduce the carbon footprint in other sectors, such as energy, transport, buildings, and agriculture, including the uptake of such solutions by SMEs.
- Demonstrate leadership and continue monitoring and quantifying the emission reductions of the deployed digital solutions in line with the relevant EU guidance and with the support of the methodology developed by the [European Green Digital Coalition](#), in view of future policy development, as well as of attracting relevant financing.