

5GSC

5G for Smart Communities

Community Survey

Public funding
support for 5G
roll-out in EU
Member states
2026 edition

June 2026

Public funding support for 5G roll-out in EU Member States- 2026 edition

CONTENTS

<i>INTRODUCTION AND KEY FINDINGS</i>	<i>2</i>
<i>METHODOLOGICAL REMARKS</i>	<i>4</i>
<i>CHAPTER I: PUBLIC SUPPORT FOR 5G ROLL-OUT AT NATIONAL LEVEL THROUGH 2027</i>	<i>5</i>
<i>CHAPTER II: 5G INVESTMENT PRIORITIES IN THE NEXT MFF</i>	<i>13</i>
<i>CHAPTER III: NEW PUBLIC FUNDING FOR FIBRE ROLL-OUT IN 2025.....</i>	<i>15</i>
<i>ANNEX I: 5G PUBLICLY FUNDED PROJECTS IN EU MEMBER STATES</i>	<i>17</i>

INTRODUCTION AND KEY FINDINGS

This study, prepared by the 5GSC Support Platform, aims to provide a comprehensive overview of public support for the deployment of 5G infrastructure and pilot use cases across the EU-27 Member States, covering both EU and national funding made available at national level. It updates and further refines the findings of a similar study, published by the Commission in June 2025 and available [here](#).

The present edition aims to provide a deepened mapping of national 5G support measures. All EU Member States were approached to contribute to the report, ensuring comprehensive geographical coverage across the EU-27. For those Member States that have implemented relevant support schemes, the study seeks to capture key dimensions, such as the timeline of the measures; the volume of funding available and left-over budgets; whether the measures are oriented primarily towards supply-side objectives (such as coverage of geographical areas) or demand-side objectives (such as the promotion of specific use cases); and the types of applicants. The study also examines whether national authorities foresee the need for additional or complementary support going forward. The evidence gathered on these points, based primarily on responses provided by Broadband Competence Offices (BCOs) through the targeted survey, informs both the qualitative analysis in Chapter I and the forward-looking assessment of 5G investment needs under the next Multiannual Financial Framework (MFF) presented in Chapter II.

What is new in the 2026 edition of the study?

- The retrospective analysis of public funding measures supporting 5G investment has been maintained and updated to cover the period 2022–2025, with budgets broken down by the year in which each measure was adopted or launched. Measures launched in 2025 are specifically identified throughout the report.
- A new and dedicated section is included addressing the next MFF (2028–2034), with a view to identifying 5G investment needs considered important by respondents and that could potentially be supported in the next EU funding cycle.
- The targeted survey has been expanded to capture additional details on support measures, including, for example, the state aid regimes applied, the extent to which preference is given to 5G standalone (SA) technologies, and the market failure areas addressed.
- In addition, both the survey and the study include a separate section on public funding schemes supporting fibre rollout, with particular attention given to new schemes launched in 2025.

The structure of the report has also been revised to reflect these developments.

Key findings resulting from the study:

- During the period 2022–2025, 13 of the 27 EU Member States implemented national public support measures for 5G investment, covering the deployment of 5G infrastructure, the development of 5G use cases, or both.
- The total identified public budget allocated to 5G-related investment throughout 2022–2025 in these 13 Member States amounts to at least EUR 2.91 billion, with support directed predominantly towards infrastructure deployment. Measures dedicated exclusively to infrastructure account for approximately 77% of the total identified budget.
- Over 90% of the budgets identified above and associated with 5G support measures were adopted or entered implementation in 2022 and 2023, reflecting the significant stimulus to investment generated by the new generation of post-2020 EU funding instruments.

- Public funding remains highly concentrated geographically. Italy and Spain account for by far the largest identified funding envelopes, each mobilising more than EUR 1 billion over the period concerned.
- By Q1 2026 the identified schemes account for at least 653 approved projects. Of these, 39% relate to 5G infrastructure deployment, 17% support both infrastructure and use cases, and 43% concern 5G use cases only.
 - Across the 27 schemes identified, explicit targeting of 5G SA remains limited. Only two measures were reported as supporting 5G SA exclusively, suggesting that most schemes continue to support deployment in broader technological terms rather than prioritising 5G SA-specific roll-out. The extent to which publicly supported measures are directed toward exclusive 5G SA deployment, and the factors that may constrain such targeting, falls outside the scope of the present study and may merit further examination.
 - Looking ahead, the study points to continued, albeit more targeted, public support for 5G. While in most countries winding up the implementation of existing measures is currently under way, 6 of the 25 respondents to the survey (5 EU Member States and Norway) indicated plans for new support measures during 2026-2027, mainly focused on infrastructure deployment. Furthermore, the assessment of needs for the next MFF highlights underserved areas, public-service applications, enabling infrastructure, cybersecurity and the scaling-up of advanced use cases as key priorities for future intervention.

METHODOLOGICAL REMARKS

Data collection on public support schemes for 5G investment drew primarily on responses submitted by national BCOs through a **targeted survey**, complemented, where necessary, by **desk research** undertaken for certain EU Member States. The survey was launched on 5 February 2026, with an initial submission deadline of 20 February 2026; a number of responses were received after this deadline and have been incorporated into the final report. It was addressed to the BCOs of all 27 EU Member States, as well as Norway.

In total, written responses were received from national BCOs across **24 EU Member States** and Norway. For the three countries **Denmark, France and Romania no responses** were received, for them, the report draws **exclusively from desk research**. The findings presented throughout reflect this combined evidence base.

The **mapping of public support measures across the EU-27 Member States and Norway** builds on the methodology applied in the 2025 edition of the study.

For **5G investments**, the study combines a **retrospective view**, covering the period 2022-2025, with a **forward-looking view** addressing currently active or planned investments under the current MFF, notably for the period 2026-2027. A separate chapter examines priority investment areas for 5G under the **forthcoming 2028-2034 MFF**.

As regards **fibre rollout**, the present study is limited to **new measures initiated or adopted in 2025**. Numerous other investments launched in previous years remained ongoing in 2025, and some continue to be implemented in 2026; however, these measures fall outside the scope of this study.

The **geographical scope** of this edition of the study includes, in addition to the EU-27 Member States, Norway. As in the previous edition, the analysis remains limited to measures implemented at national level, with regional schemes excluded from the scope of the exercise.

The **funding sources** considered comprise both EU-funded measures, notably under the Recovery and Resilience Facility (RRF) and the European Regional Development Fund (ERDF), and measures financed from national budgets. Programmes implemented under direct EU-level management, such as the Connecting Europe Facility (CEF) and other centrally managed programmes supporting 5G investment, fall outside the scope of this study.

From a **technological perspective**, the study aims to map the availability of public funding support for the deployment of **5G infrastructure** and the **development of 5G use cases** across the EU Member States and Norway. Funding schemes whose primary objective is to provide broadband access to end users at a fixed location through 5G, namely fixed wireless access (FWA), were excluded from the scope of the analysis.

The structure of the study reflects the revised scope of the exercise:

- **Chapter I** provides a **quantitative and qualitative overview of public support measures for 5G through 2027**, combining a retrospective perspective covering the period 2022-2025 with a forward-looking perspective addressing the period 2026-2027.
- **Chapter II** sets out an initial assessment of **5G investment needs** that could be considered for support in the **next 2028-2034 MFF**.
- **Chapter III** presents a snapshot of public funding support measures for fibre roll-out launched in 2025.
- **Annex I** updates the repository of supported projects for both 5G use cases and 5G infrastructure roll-out.

CHAPTER I: PUBLIC SUPPORT FOR 5G ROLL-OUT AT NATIONAL LEVEL THROUGH 2027

Retrospective view: public support for 5G roll-out throughout 2022-2025

Based on the results of the survey, complemented by desk research, during the period 2022-2025, 13 Member States implemented national public support measures targeting the deployment of 5G infrastructure, the development of 5G use cases, or both. Although Norway is included within the geographical scope of the study, no 5G support measures were implemented there during the reference period. This section presents the main findings of the research from both a quantitative and a qualitative perspective.

New 5G support measures launched in 2025

As shown by the results of the survey, **three new public support measures** for 5G investment were **launched in 2025**, all aimed at **infrastructure deployment**.

In **Italy**, two measures were launched in 2025 in the context of preparations for the Milano-Cortina 2026 Olympic Games:

- The *Milano Cortina Healthcare Plan*, with a budget of EUR 18 million financed through the National Fund for Technological Innovation, aims to strengthen 5G mobile connectivity and deploy dedicated digital services.
- The *Milano-Cortina Tunnel Plan*, financed under the National Recovery and Resilience Plan – Complementary Plan with a total budget of EUR 12 million, aims to provide indoor 5G mobile connectivity in road tunnels located along the transport corridors linking the Olympic venues.

In **Slovenia**, a public call with a budget of EUR 4.2 million financed from national sources was launched to co-finance the construction of open base station infrastructure for 5G mobile networks in areas affected by the floods of August 2023. The measure is intended to support 5G mobile coverage in market failure areas, ensuring an ordinarily available outdoor data transmission speed of at least 100 Mbps upload.

Public support for 5G roll-out: 2022-2025 aggregate data

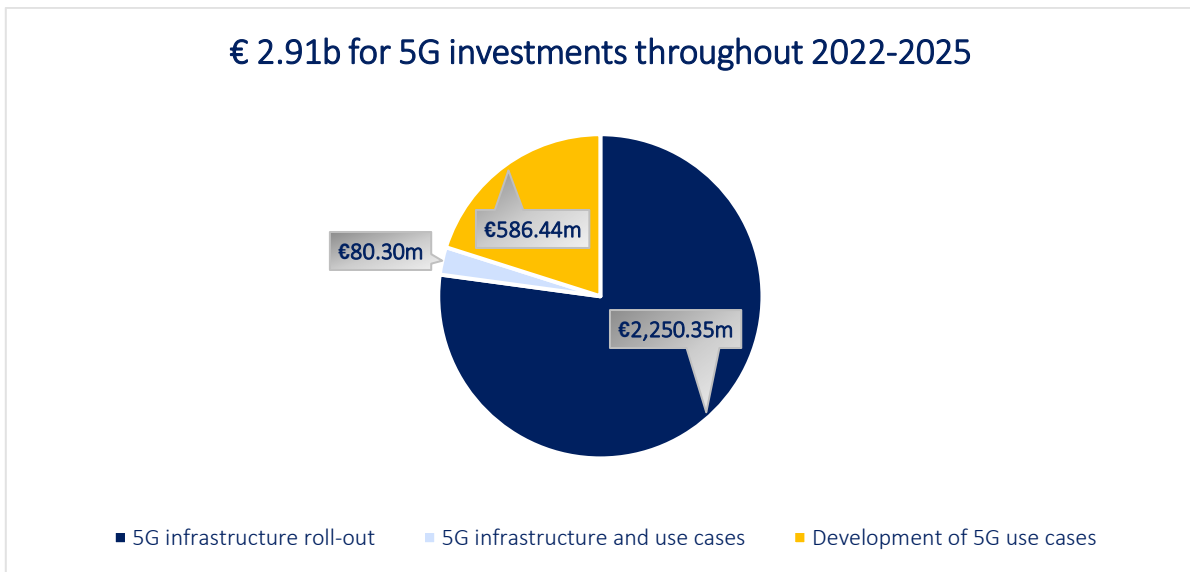
More than EUR 2.9 billion for 5G investments throughout 2022-2025 at national level

The updated **aggregate data** for the period 2022–2025 confirm that public support for 5G across EU Member States was driven primarily by the objective of supporting **infrastructure deployment**. The largest funding volumes were concentrated in a limited number of Member States and were financed predominantly through the **RRF**. At the same time, the data show that public intervention was not confined to network deployment alone. In several countries, support measures also aimed to foster the **development of 5G use cases**, thereby linking infrastructure investment to broader objectives relating to innovation, experimentation and market

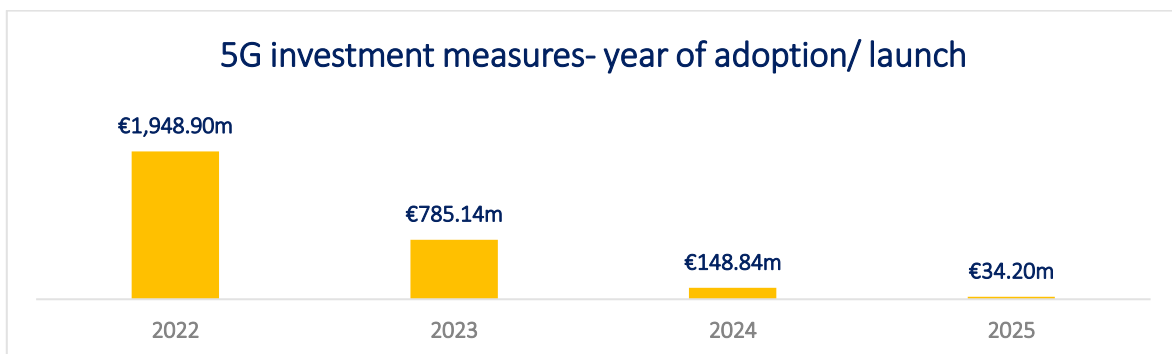
uptake. The analysis below sets out these trends on the basis of the available aggregate data on budgets and supported projects, while also highlighting significant differences in the scale and design of national support measures.

2022-2025 budgets for 5G investments

The total identified public budget allocated to 5G-related investment at national level across EU Member States (excluding regional support measures) amounts to at least **EUR 2.91 billion**, drawing on a combination of national and EU funding sources. The data point to a predominance of support for infrastructure deployment. Measures dedicated exclusively to infrastructure account for approximately 77% of the total identified budget. By contrast, measures dedicated exclusively to 5G use cases or combining infrastructure deployment and 5G use cases represent around 23% of total public support¹.



More than **90% of the budgets** associated with these measures were adopted or started implementation in 2022² and 2023, coinciding with the first implementation years for the RRF and the new 2021-2027 ERDF.

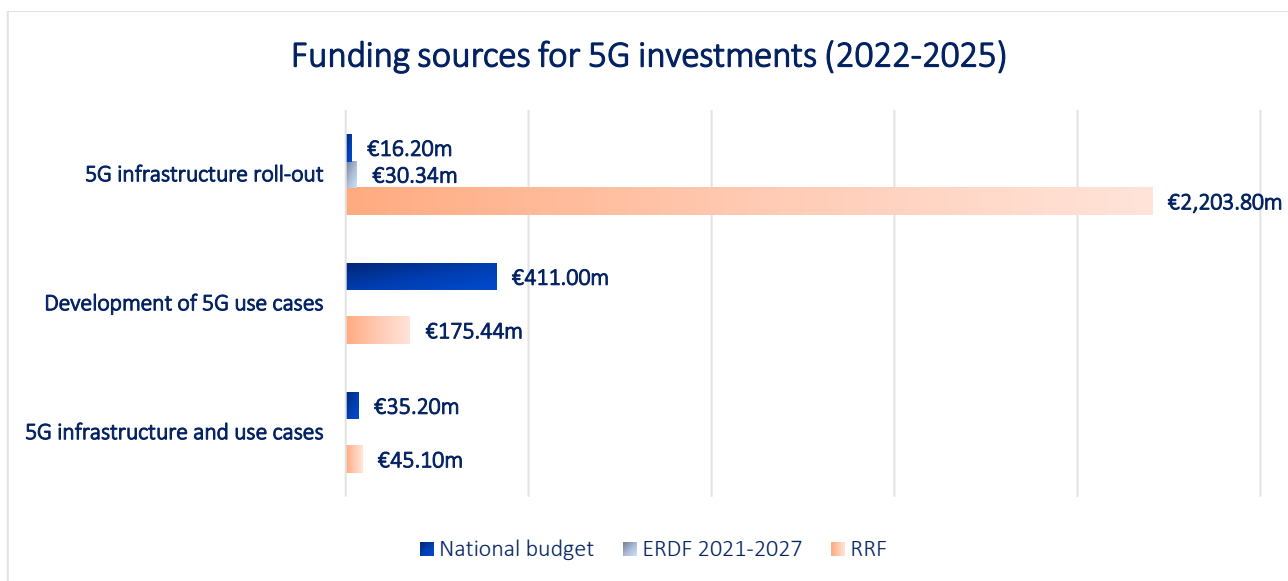


¹ In certain Member States, notably Latvia and Lithuania, 5G investments are included in broader connectivity measures financing both fixed and mobile infrastructure. As the budgets specifically attributable to 5G are not distinguished within these broader envelopes, the full budget of the measures is reflected in the aggregate figures presented here.

² The 2022 figure includes a EUR 220 million budget for the German 5G Innovation Programme which started in 2019 and continued implementation until 2024.

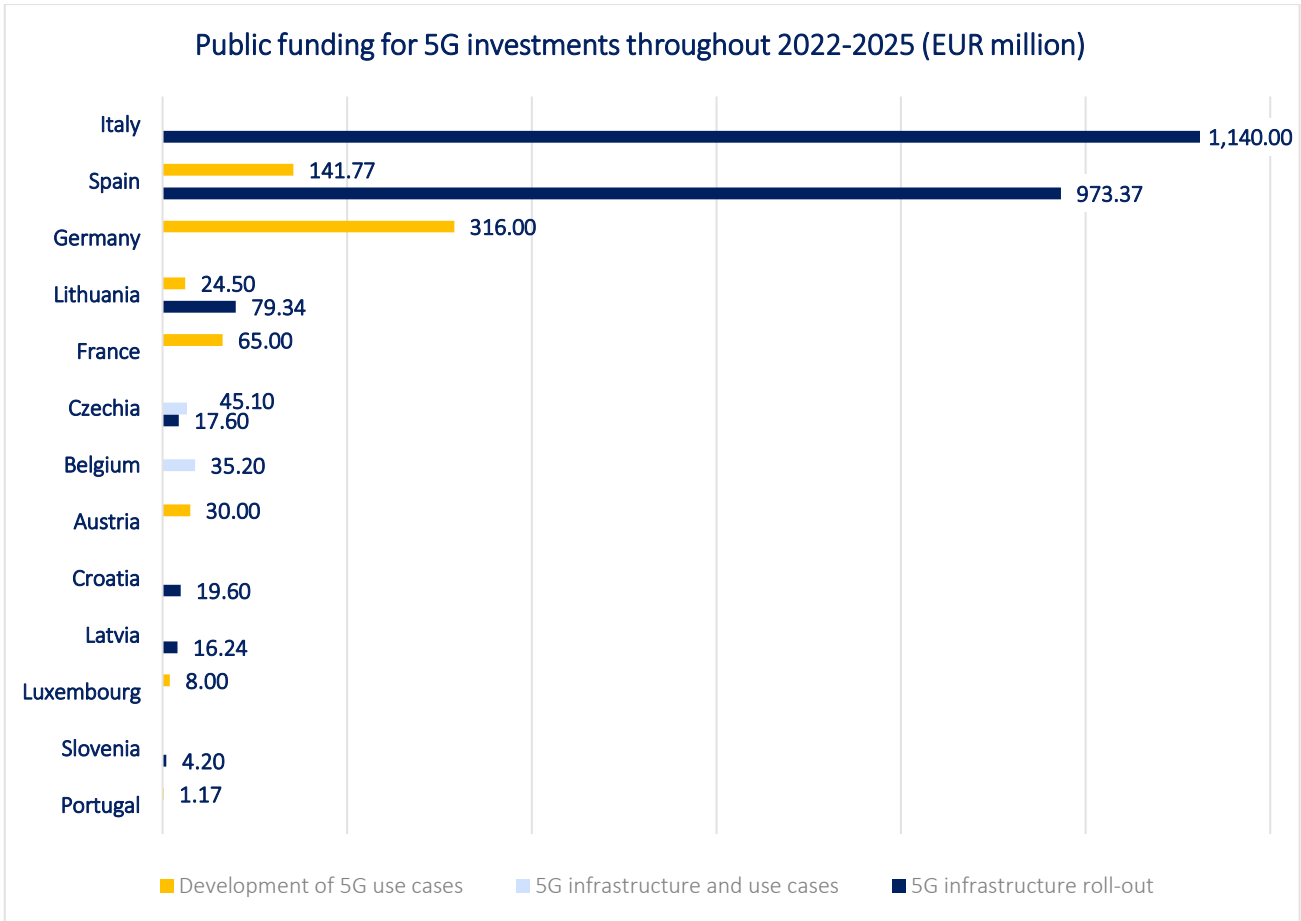
In terms of **funding sources**, RRF remains the main source of financing within the overall 5G funding mix, accounting for approximately 83% of the total identified budget. Other sources, including national budgets and, in a limited number of cases, ERDF 2021-2027, play a complementary role. As the implementation period of the RRF draws to a close, however, the focus is expected to shift increasingly towards the ERDF and national budgets.

This trend is already visible in relation to the **development of 5G use cases**, whether supported on a stand-alone basis or in combination with infrastructure measures, where **national budgets** account for around **two thirds of the total available funding envelopes over the period concerned**. In countries such as **Austria, France, Germany and Luxembourg**, support for 5G use cases is financed exclusively through national funds. **Belgium** also relies on national funding for measures combining infrastructure and use cases. By contrast, in Czechia, Lithuania, Portugal or Spain, the RRF remains the principal source of funding for the implementation of 5G use cases.



The aggregate budgets remain **highly concentrated geographically**. **Italy and Spain** account for by far the largest identified funding envelopes, each mobilising more than EUR 1 billion in public support over the period concerned. Germany follows, in a second category, with around EUR 316 million for development of 5G use cases. All other Member States remain below EUR 105 million. As a result, the overall EU picture is shaped to a significant extent by a limited number of large-scale national programmes.

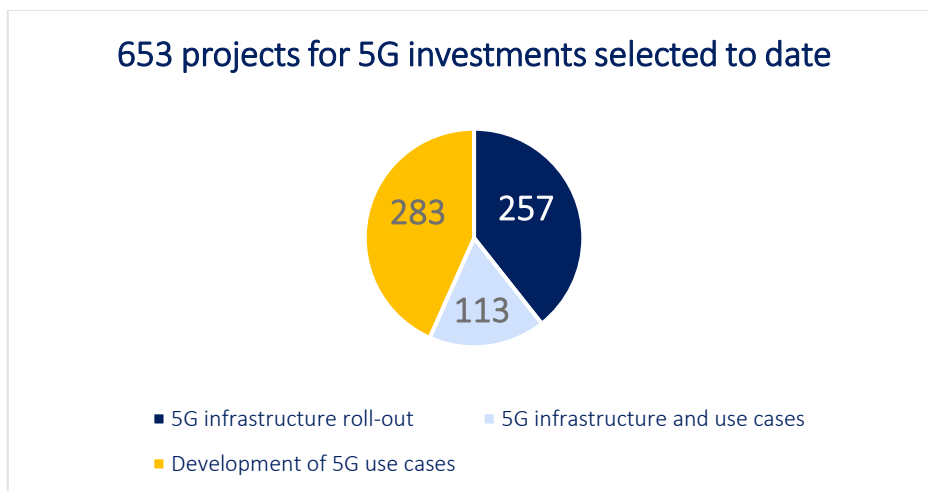
In most Member States, public funding is directed either towards the deployment of 5G infrastructure or towards the development of 5G use cases, in some instances accompanied by related infrastructure investment, but not both. Only **Spain, Lithuania and Czechia** have put in place measures supporting both infrastructure deployment and investment in 5G use cases. The graph below represents the aggregate budgets at national level in those countries where public support measures were identified, based on the results of the survey and desk research. No public funding initiatives for 5G investments were identified in the other 14 EU Member States throughout the reference period (2022-2025), based on the desk research and survey results.



When it comes to the **form of funding**, all identified funding measures provide support in the form of **grants**.

5G Projects

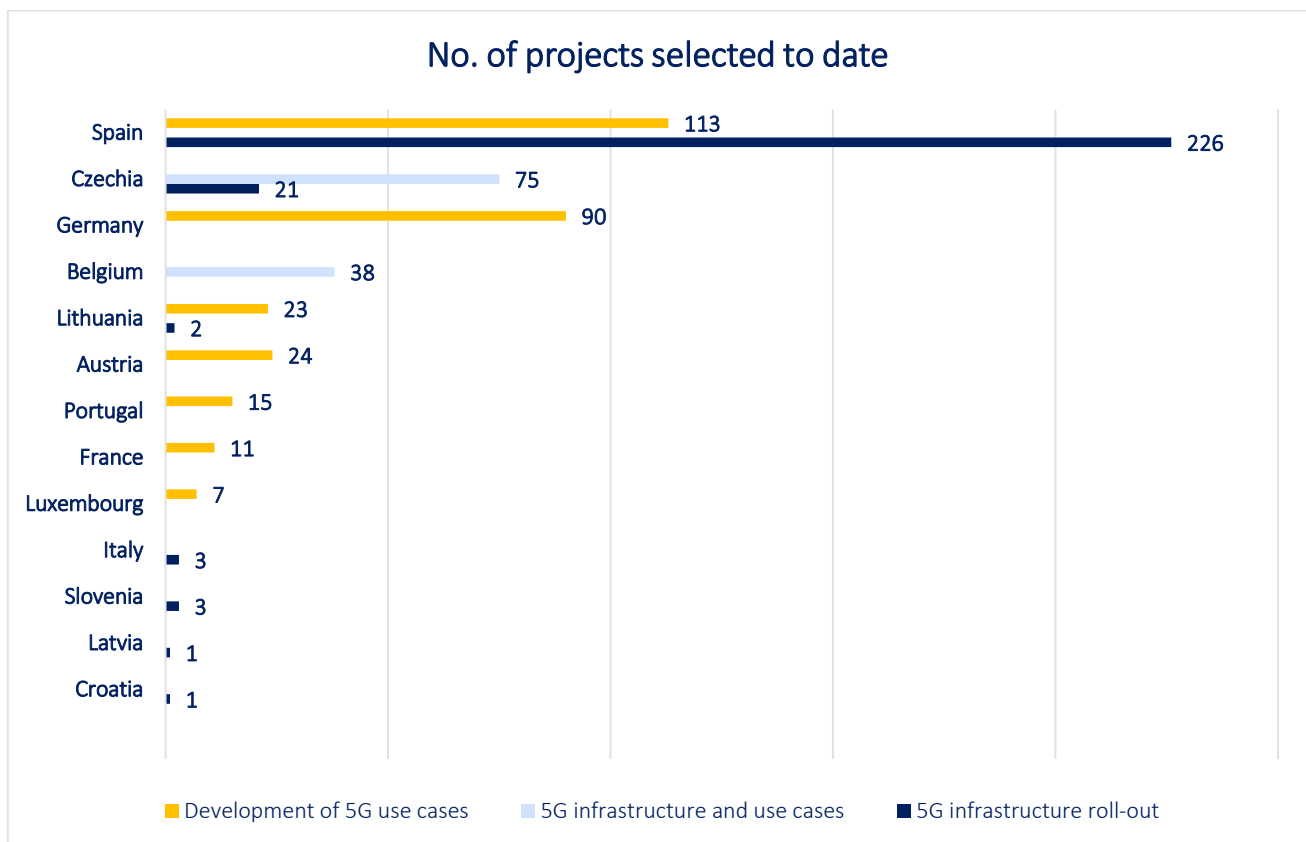
The identified schemes account, to date, for at least **653³ projects approved for funding**. Of these, 43% concern 5G use cases only, 17% support both infrastructure and use cases, while 39% are projects for deployment of 5G infrastructure.



³ Based on publicly available data and data provided by the BCOs in the targeted survey.

A comparison of budgetary and project data points to an important difference in the nature of the interventions supported. While infrastructure-related measures account for the vast majority of identified public funding, they represent a smaller share of the total number of projects than their budgetary weight might suggest. Conversely, measures supporting 5G use cases account for a relatively limited share of the overall budget, but for a considerably larger share of funded projects. This is consistent with the nature of the interventions concerned, as **infrastructure measures tend to be more capital-intensive, whereas use-case measures are generally smaller in scale and greater in number.**

The country data illustrate this contrast. In **Italy**, public support is concentrated in a small number of large infrastructure measures, resulting in very-high-budget volumes but a comparatively limited number of projects. **Spain**, by contrast, combines large-scale infrastructure support with dedicated measures for use cases, which contributes both to a high overall budget and to a much larger project portfolio. A similar pattern can be observed in **Germany, Czechia and Lithuania**, where support extends beyond infrastructure deployment to include measures linked to experimentation and uptake.



Project figures should also be interpreted with caution. The number of projects is based on available information provided through the survey and desk research and may therefore remain incomplete. In addition, the number of supported projects may change over time during implementation. For example, in Spain, under one of the three support measures identified (the UNICO 5G Redes Backhaul measure supporting 5G infrastructure roll-out), the initial number of awarded projects was 103, but 30 projects have so far been withdrawn by the beneficiaries.

Qualitative findings

The qualitative evidence complements the aggregate budgetary and project data by showing that national 5G support measures differ not only in scale, but also in their design. Across the **27 schemes identified in 13 Member States**, variations can be observed in the technological orientation of the measures, the state aid regimes applied, the market failures addressed, and the profile of eligible applicants. At the same time, a number of common patterns can be identified.

Limited explicit targeting of 5G SA. Data collected through the survey indicate that the explicit targeting of 5G SA remains relatively limited. Of the 27 schemes identified, only two explicitly support 5G SA exclusively. The remaining schemes either support both SA and non-SA deployment, or do not report a specific technological distinction.

The two measures specifically targeting **5G SA** technology were reported in **Latvia**, under the broader programme for very high-capacity broadband infrastructure, and in **Spain**, under the *UNICO 5G Active Networks* programme. Both measures support the deployment of 5G infrastructure. **No measure financing the development of 5G use cases was reported as specifically targeting 5G SA.**

This suggests that, during the period 2022- 2025, most schemes were designed to support 5G deployment in general terms, while **allowing for different technological configurations rather than limiting eligibility to SA-based deployment.** Measures supporting both SA and non-SA solutions appear to be particularly common in schemes focused on use cases and pilot projects, where the objective is typically to enable experimentation and deployment in real-life settings rather than to prescribe a specific network architecture.

State aid regime applied. The state aid regimes used are closely linked to the scope and nature of the support measures concerned. Schemes supporting the deployment of 5G infrastructure relied either **on Article 52a of the General Block Exemption Regulation (GBER)**, which sets out the conditions for aid to 4G and 5G mobile networks, or were implemented as **notified aid** measures. Article 52a GBER was applied in the case of ten schemes, while two infrastructure schemes, both in Spain, were implemented on the basis of notified aid.

As regards the development of 5G use cases, whether supported on a SA basis or in combination with infrastructure components, the state aid regime applied generally related to aid for research and development projects, in particular under **Article 25 GBER**. The state aid treatment of these schemes thus reflects their emphasis on experimentation, testing, innovation and application development, including in cases where infrastructure elements are also part of the supported intervention.

Market failure areas addressed. The analysis of market failure points to two broad intervention rationales.

Measures supporting the deployment of **5G infrastructure** were generally used to address **uneven commercial incentives for network rollout** across different territories. These measures typically target rural, remote, sparsely populated or white areas and, in certain cases, also cover transport corridors and cross-border areas.

By contrast, measures supporting the **development of 5G use cases**, including those with an infrastructure component, are primarily intended to address **barriers to innovation and adoption**. They are commonly linked to **pilot projects, early-adoption risks, research and development activities, the needs of public administrations, or thematic application areas such as smart cities, smart environment and Industry 4.0.**

Eligible applicants. The profile of eligible applicants also varies systematically depending on the type of scheme.

Schemes supporting **5G infrastructure deployment** tend to have the narrowest applicant base. They are typically addressed to mobile network operators, tower companies and other infrastructure providers. In some cases, public authorities or municipalities may also play a role; however, the applicant model remains centred on actors directly involved in network deployment. This is consistent with the technical complexity and capital-intensive nature of infrastructure rollout measures.

By contrast, schemes supporting **5G use cases** are markedly more open and heterogeneous. Eligible applicants frequently include network operators, undertakings, research organisations, universities, public authorities and consortia bringing together several of these actors. This indicates that support for use cases is designed not only to stimulate the development of network-enabled applications, but also to foster cooperation across the wider innovation ecosystem.

Overall, the applicant data point to two distinct governance models for public support to 5G. Support for infrastructure is generally channelled through a relatively closed group of deployment actors, whereas support for use cases relies on a broader ecosystem approach involving business, research and public-sector stakeholders. This distinction is significant, as it shows that the **policy architecture of 5G support extends beyond connectivity policy in the narrow sense and increasingly overlaps with industrial, research and public innovation policy.**

Scheme assessment. Evidence relating to the assessment of support schemes remains relatively limited, as in most cases the publicly funded investments are still under implementation. Given the significant share of RRF funding in the overall financing mix, it can be expected that further evidence on the effectiveness and impact of these measures will emerge in the broader context of RRF evaluation and assessment.

Where assessments have already been carried out, the available evidence points to positive results. In **Germany**, for example, the evaluation of implemented measures found them to be effective. In some cases, consultations with industry also identified a continued need for support schemes to facilitate the implementation of 5G projects, which in turn led to the launch of a new scheme in 2026.

Forward looking perspective: public support for 5G roll-out throughout 2026-2027

Continuation of support under existing schemes

For all currently identified support measures, the application process has closed, and no new projects may be submitted under the existing schemes.

New support measures for 5G roll-out throughout 2025-2027

Six BCOs responding to the survey (five EU Member States and Norway- see below), indicated that their countries intend to launch new support measures for 5G rollout during the period 2026-2027. Of these, only **two Member States (Germany and Greece)** reported plans to introduce a measure specifically supporting the **development of 5G use cases**. In the other countries concerned, the envisaged support relates exclusively to the **deployment of 5G network infrastructure**.

Planned support development of 5G use cases in Germany and Greece

In **Germany**, a new support measure finances the development of 5G use cases and the broader 5G ecosystem, with a view to assisting companies in the deployment of private 5G networks and other innovative network technologies. The scheme has an overall budget of approximately EUR 60 million and will run through 2026-2029, with a [first call for proposals](#) launched in March 2026.

The **Greek** BCO indicated, in response to the targeted survey, the intention to launch a support measure for the development of 5G use cases, with a total budget EUR 6.2 million to be financed from the national budget.

Planned support for 5G infrastructure roll-out in Estonia, Italy, Lithuania, Norway, Spain and Sweden

In four countries new support is being planned for the deployment of 5G infrastructure:

- **Estonia:** EUR 9.37 million from the ERDF 2021-2027 is expected to be made available for 5G infrastructure rollout during the period 2026-2029.
- **Italy:** Over the next two years, the Government plans to support:
 - i) pilot projects related to edge cloud computing platforms installed in telecom operators' networks, with funding of EUR 3 million;
 - ii) projects for the deployment of wireless distributed antenna system (DAS) infrastructure for 5G mobile networks in key areas of public interest, with funding of EUR 25.5 million; and
 - iii) the extension of the Italian 5G Backhauling Plan to additional existing mobile radio sites, with total funding of EUR 71 million.
- **Norway:** A new notified broadband scheme is expected to be adopted in the first half of 2026. The scheme would combine support for broadband rollout and mobile coverage, including both 4G and 5G, and would run over the period 2026-2030. It would have a maximum budget of NOK 5 billion for the full period, with annual funding of up to NOK 1 billion. Financing is to be provided through the national budget, with the possibility for additional contributions from county authorities and local municipalities
- **Spain:** The authorities are planning a support measure of EUR 37 million for 5G rollout in sparsely populated areas, financed through the ERDF 2021-2027.

The **Swedish** Government tasked the telecoms regulator, PTS, in February 2025 with examining the conditions for introducing State support for the expansion, management and operation of infrastructure for mobile services. In February 2026, PTS responded with a proposal for government support aimed at strengthening mobile coverage and capacity along designated roads and railways. No decision has yet been taken on the implementation of such a programme. Should it be introduced, implementation would begin no earlier than 2027. It should also be noted that state aid programmes for infrastructure in Sweden are technology-neutral and would therefore not be limited to 5G. Nevertheless, such a programme, if implemented in the 2027-2030 period, would be expected to generate additional 5G coverage and/or capacity.

The **Lithuanian** BCO also indicated an interest in launching new 5G support measures; however, no further details are currently available.

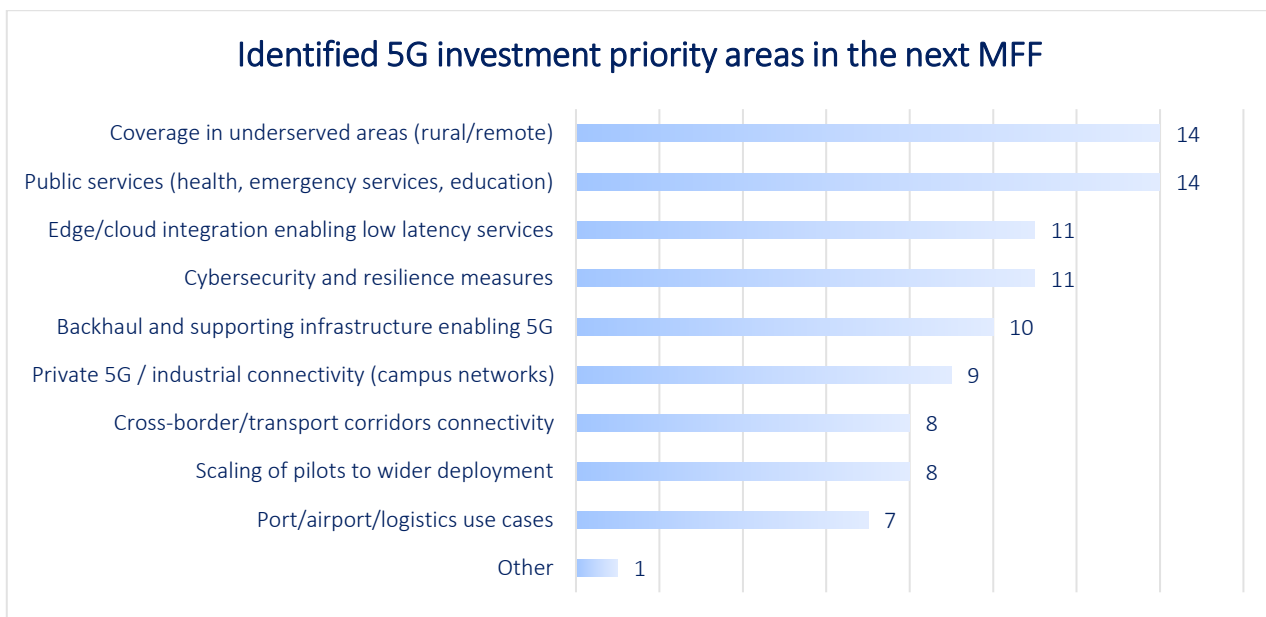
Finally, in **Hungary**, support is made available for the deployment of optical fibre connections to base transceiver stations (BTS) that do not yet benefit from such links. This support is included within the budget of the ongoing Gigabit Programme financed through the ERDF 2021-2027.

CHAPTER II: 5G INVESTMENT PRIORITIES IN THE NEXT MFF

This chapter provides an initial assessment of 5G investment needs that could be considered for support under the 2028-2034 MFF. The analysis is based on written responses to the targeted survey addressed to the national BCOs and indicates the areas in which Member States consider that continued EU support for 5G may remain justified, both for infrastructure deployment and for the development and wider uptake of 5G-enabled applications.

The survey results point to a broadly positive, although not unanimous, view on the **need for continued EU support**. Out of 24 EU Member States responding to the survey, 18 indicated that 5G investments, covering infrastructure rollout and/or 5G use cases, should be supported under the next MFF. By contrast, 6 Member States either considered that such investments should not be supported or expressed uncertainty. While these results confirm continued support for maintaining 5G as an eligible area for EU investment, they also suggest that future intervention may need to be targeted and clearly justified in terms of European added value.

Respondents supporting continued EU financing were invited to identify the types of 5G investment needs that should be prioritised. As multiple responses could be selected, the results indicate **relative priority areas** rather than a ranking of mutually exclusive options.



The strongest support was recorded jointly for **coverage in underserved areas**, including rural and remote areas, and for **public services applications**, including health, emergency services and education, each selected by 14 respondents. The first of these confirms that territorial deployment gaps remain a central investment concern for the next MFF, indicating that, despite progress in rollout, respondents continue to see a clear role for EU funding in areas where market-driven investment remains insufficient. This finding is consistent with the broader results of the study, which show that public support for 5G to date has been directed primarily towards infrastructure deployment. At the same time, the equally strong support for public services suggests that future EU intervention is expected not only to address connectivity gaps, but also to support socially relevant applications where 5G can contribute to improved service delivery, resilience and accessibility. More broadly, this points to an emerging rationale for future support that combines cohesion objectives with wider public value considerations.

A second cluster of priorities concerns the **enabling conditions for advanced 5G deployment and performance**. **Cybersecurity and resilience measures**, as well as **edge and cloud integration** enabling low-latency services, were each selected by 11 respondents, while **backhaul and supporting infrastructure** enabling 5G was selected by 10 respondents. The convergence of responses across these categories is notable, as it suggests that future 5G investment needs are increasingly understood in relation to the wider technical ecosystem required for secure, reliable and high-performance connectivity. Rather than focusing on coverage alone, respondents appear to attach growing importance to the underlying capabilities that determine whether 5G networks can support more demanding and strategic use cases.

A further group of priorities relates to specific **deployment environments and industrial applications**. **Private 5G and industrial connectivity**, including campus networks, was selected by 9 respondents, while **both cross-border and transport corridors connectivity** and the **scaling of pilots to wider deployment** were selected by 8 respondents. **Port, airport and logistics use cases** were selected by 7 respondents. These responses suggest that future support needs may increasingly lie at the intersection of connectivity policy and industrial transformation. In particular, interest in private 5G and campus networks points to continued demand for support in environments where advanced connectivity can enable automation, productivity gains and innovation. At the same time, the emphasis on scaling up pilots indicates that the challenge increasingly lies not only in testing 5G applications, but also in moving from demonstration to wider operational deployment.

Taken together, the responses point to three broad categories of expected investment needs under the next MFF. First, there remains clear **demand for support for territorial deployment**, particularly in underserved areas, alongside equally strong support for 5G-enabled public services. Second, respondents identify a need to **strengthen the technical and operational enablers of advanced 5G performance**, notably cybersecurity and resilience, edge and cloud integration, and backhaul. Third, there is visible support for investment in **high-value applications and adoption environments**, in particular industrial connectivity, transport corridors, logistics use cases and the scaling-up of pilot projects. This suggests that future EU support for 5G may need to combine a continued cohesion-oriented deployment logic with a stronger focus on performance, resilience and application uptake.

Some respondents also pointed out to the likelihood that future investment needs will require a sustained, multi-year funding perspective. This applies in particular to the deployment of next-generation digital infrastructures based on 5G SA networks, edge cloud computing, network densification and advanced DAS architectures, as well as to the launch of large-scale 6G experimentation.

Respondents were also asked to identify the **most suitable EU instruments for financing these investment needs**. The results show a clear preference for a combined delivery model. Twelve respondents considered that these needs should be supported through both central EU programmes and National and Regional Partnership Plans. By contrast, three respondents selected central EU programmes only, and two respondents selected National and Regional Partnership Plans only.

These responses suggest that future 5G investment needs are generally not regarded as best addressed through a single financing channel. Rather, the **preference for a combined approach** indicates that different types of 5G investment may require different implementation mechanisms. Central EU programmes may be better suited to priorities with a stronger European dimension, such as cross-border connectivity, technological innovation or strategic industrial applications, while National and Regional Partnership Plans may be better placed to address territorial coverage gaps and other context-specific investment needs. The preference for combining the two approaches therefore points to a differentiated intervention logic, under which future 5G support would benefit from both strategic EU-level steering and territorially tailored implementation.

Overall, the survey results indicate that a significant majority of respondents see continued justification for EU support to 5G under the 2028-2034 MFF, while also suggesting that the rationale for such support is evolving. Although coverage in underserved areas remains the most widely recognised need, respondents also point to the growing importance of public-service applications, enabling infrastructure, cybersecurity and the scaling-up of advanced use cases. Future EU support for 5G may therefore need to move beyond a narrow focus on rollout alone and reflect a broader policy approach combining coverage, performance, resilience and uptake.

CHAPTER III: NEW PUBLIC FUNDING FOR FIBRE ROLL-OUT IN 2025

This chapter provides an overview of new public support measures for fibre rollout that were launched or adopted in 2025. Several measures are of particular relevance.

In **Bulgaria**, a funding scheme amounting to EUR 200 million was operationalised. The measure, financed through the RFF, supports the project large-scale deployment of digital infrastructure in Bulgaria. Its objective is to establish symmetrical gigabit backhaul networks across the country, with a particular focus on underserved areas, while also facilitating interconnection with networks at European level. The technical specifications of the network are intended to ensure connectivity of 1 Gbps for end users. The newly built infrastructure is expected to support both fixed and mobile networks serving end customers. In January 2025, a [procedure](#) was launched to select beneficiaries for the deployment of very-high-capacity networks providing internet access, primarily in rural and sparsely populated areas; this selection procedure was [completed](#) in May 2025.

In **Estonia**, a EUR 45 million [support measure](#) co-financed through the 2021-2027 ERDF was launched. The measure supports the construction of very-high-capacity access networks capable of delivering download speeds of 1 Gbps to addresses located in rural and small-town settlements where no fixed access network currently enables broadband connectivity of at least 100 Mbps.

In **France**, the Directorate General for Enterprise launched an experimental [support scheme](#) for complex fibre-optic connection works carried out on private property. Initially introduced in September 2025 and limited to users in the 3 000 municipalities where the copper network switch-off was scheduled in the short term, the mechanism was extended nationwide in 2026. The scheme remains open until 31 January 2027 for private individuals and very small businesses. Its purpose is to support fibre rollout by addressing cases in which connection works on private property are particularly complex. It provides funding for all, or part of the works required for such complex fibre-optic connections.

In **Hungary**, the Government launched in 2025 the EUR 213.3 million ⁴ [Gigabit programme](#), co-financed from the 2021-2027 ERDF. The programme supports the rollout of high-speed internet infrastructure in areas lacking gigabit connectivity and considered economically non-viable.

In **Italy**, two measures were introduced:

- First, the [Strengthening of Backhaul Networks Plan](#) allocated EUR 95 million under the National Complementary Plan for the development of a new fibre-optic backhaul network. The measure supports 576 Access Network Collection Points, distributed across more than 500 municipalities, most of them located in white areas. These points are to be connected by fibre to the main backbone network, thereby enabling the use of access networks by end users. The tender for implementation of the measure was awarded in December 2025 for a budget of EUR 80.4 million.
- Second, the National Connectivity Fund, with a budget of EUR 733 million, was established following the revision of the National Recovery and Resilience Plan in November 2025. Structured as a facility-type instrument, the measure is intended to stimulate private investment and improve access to financing in the ultra-broadband network infrastructure sector. By easing financing constraints and encouraging market participation, the Fund is designed to support the rollout and upgrading of next-generation connectivity infrastructure. The [public consultation](#) for the implementation of the Plan was launched in early 2026.

In **Slovenia**, the [Agency for Communications Networks and Services](#) published a [call for expressions of market interest](#) for the construction of next-generation broadband networks or the upgrade or expansion of existing networks with a transmission speed of at least 100 Mbps. The [public consultation on the funding scheme](#), which

⁴ Representing a total 84.9 BHUF budget, calculated at an average rate of 398 HUF/EUR

is co-financed through 2021-2027 ERDF funds, was launched in December 2025. The call for proposals was [launched in April 2026](#), with a total budget of EUR 26 million.

From a forward-looking perspective, **Norway** is also expected to adopt, in the first half of 2026, a new notified broadband scheme with a budget of NOK 5 billion, combining support for broadband rollout and mobile coverage. Further details on this measure are provided in Chapter I.

In other EU Member States, previously established support measures continued to operate in 2025. This is the case, for example, in Cyprus, Czechia, Poland, Finland or Sweden. In Sweden, for instance, a multiannual programme was already in operation, with dedicated allocations for 2025 and 2026. The year 2027 will be the final year for new applications under the programme, while projects approved in that year are expected to be completed by 2030. Similarly, in Poland, support for the development of broadband infrastructure continued in 2025, with the fourth call for proposals for project funding under Poland's National Recovery and Resilience Plan- investment C1.1.1.

ANNEX I: 5G PUBLICLY FUNDED PROJECTS IN EU MEMBER STATES

This Annex aims to provide the basis for a repository of publicly funded 5G investments across EU Member States. It gathers, into a single place, links to the databases of 5G publicly supported projects at national level, distinguishing between 5G use cases & infrastructure projects and 5G infrastructure roll-out projects.

The information presented here depends on availability of data at national level, and may therefore remain incomplete.

Publicly funded 5G use cases & infrastructure projects

Austria	BBA2030: GigaApp projects
Belgium	5G Pilot projects (2022) 5G Pilot projects (2023) 5G Pilot projects (2024)
Czechia	5G for Smart Cities
France	5G and networks of the future
Lithuania	5G sandbox
Luxembourg	5G communication technology projects
Portugal	5G use cases
Spain	UNICO sectorial 5G (2022) UNICO sectorial 5G (2023) UNICO 6G innovation (2022) UNICO 6G innovation (2023)

Publicly funded 5G infrastructure roll-out projects

Croatia	5G passive infrastructure
Czechia	5G networks in white areas
Italy	5G backhaul 5G densification Milano Cortina Healthcare Plan Milano-Cortina Tunnel Plan
Latvia	Last-mile very high-capacity broadband infrastructure
Lithuania	Development of ultra-fast communication infrastructure Ultra-fast connectivity infrastructure
Slovenia	High-performance 5G mobile networks – Reconstruction Fund
Spain	UNICO 5G backhaul UNICO 5G active networks (2023) UNICO 5G active networks (2024)