



Advanced Connectivity: the essential pillar of European competitiveness and sovereignty

Networld Europe and 6G-IA workshop, 13 May 2025

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International political context

- Competitiveness compass priorities: competitiveness, decarbonisation, security
- (Inter)dependence vs rivalry: economic security, [open] autonomy
- Fast change vs longer term goals; openness vs collaboration: industrial policy, PPP

Technology & market context

- Data economy pervasive; digital technologies critical; e-infrastructures enabling
- Virtualisation/ softwarisation; telco-cloud-edge convergence/continuum; AI revolution
- EU gaps [5G lessons]: dependencies, fragmentation, uptake; RoI, investment, deployment

Challenges & opportunities

- Networks vs other technologies: what will be the market centre of gravity/ power?
- Physical layer of connectivity [still...]: dependencies, sustainability/ resources, security
- Virtual layer: openness vs orchestration, resilience/ cyber, eID/ data protection

Elements of response

- Actors [EU vs MS vs private sector] & tools [coordination, legislation, funding]
- Intervention scope; innovation/ commercialisation cycle
- Public policy goals vs private sector drive for profit; dual use



EU public funding: from current to next MFF

- Drivers: programs [specific scope, instruments, rules] vs policy [results, impact]
- Aims: policy-oriented budget, less programs [no overlap], full market cycle, simpler rules
- Competitiveness fund; digital window: next Horizon, CEF, DEP?



The case of future networks; role of SNS

- SNS positive mid-term review; What next [what, who, how]? more scope, tools, partners?
- Policy targeting level vs accountability
- Policy "RoI": conditionality, share/ exploitation of results, IPR...



Future governance ingredients

- Instruments: grants, procurements, prizes, financial guarantees...
- Innovation to exploitation cycle; stages to be addressed
- EU vs MS vs private players' influence over programming + execution; EU dimension



Future governance ingredients (2)

- Openness to non-European participation
- Contributions [by actor]: financial vs in-kind, co-funding level
- Cost/ reimbursement model