



# Masters of Digital 2025

20 FEBRUARY 2025 | BRUSSELS & ONLINE

Event Report





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# Masters of Digital 2025

The biggest tech policy event in Europe returned on 20 February 2025 for its 8th and biggest edition yet. Masters of Digital 2025 brought together tech leaders and policymakers to tackle the different challenges Europe faces, through lively debates and (contrasted) insights that helped us understand the current digital situation in Europe in connectivity, healthcare, data, connectivity, sustainability, and much more.

What a pleasure to have welcomed over 600 at the Steigenberger Wiltcher's Hotel in Brussels. And even more, we were joined by more than 700 people online.

The level of speakers is just increasing year by year with key influential figures such as Commissioner Ekaterina Zaharieva and Commissioner Valdis Dombrovskis, as well as member state Ministers such as Janos Boka from Hungary and Liisa-Ly Pakosta from Estonia, and many members of the European Parliament and the European Commission.

Listening to the valuable insights from our panellists and keynote speakers, some key concluding points stand out:

1. Europe can win the Tech Race: while the race is on, Europe has to become a digital leader. For that, 3 steps are necessary: cutting the burden, incentivising the innovation, and simplifying processes.
2. Europe's connectivity lags behind: we need to see more adoption of 5G to prepare for the rollout of 6G, as well as new investment and simplified regulations to make it happen.
3. Europe spends €1 trillion annually on healthcare, yet without significant digital transformation, this spending is unsustainable.
4. Transatlantic relationships remain essential, as our deeply connected economies highlight the need for cooperation despite current challenges.

5. AI plays a critical role in healthcare, cybersecurity, and digital transformation. While Europe has world-class AI talent, it struggles with its adoption due to administrative burden and lack of investments.

Another key conclusion reached by all speakers was the need for Europe to win the tech race to ensure its security. Against the current geopolitical backdrop and the challenges in transatlantic cooperation, the positive role of technology allows us to strengthen our digital resilience, competitiveness, and democracy.

#EuropeCan win the Tech Race, as outlined in our recently published [Winning the Tech Race](#), with a 3-step gameplan to put EU tech leadership at the front. One step, in particular, resonated strongly throughout the panels: we must end the era of over-regulation to reduce regulatory burden on EU companies. Now it's time to shift from words to action and create the right conditions for companies to scale up in Europe.

A heartfelt thank you to everyone who attended this year's Masters of Digital, to our speakers and sponsors without whom this successful event would have not been possible.

We look forward to seeing you again in 2026 for the next edition!

## MoD in Numbers



**542**  
in person attendees



**71**  
countries represented



**245,000**  
estimated people reached with #MoD2025

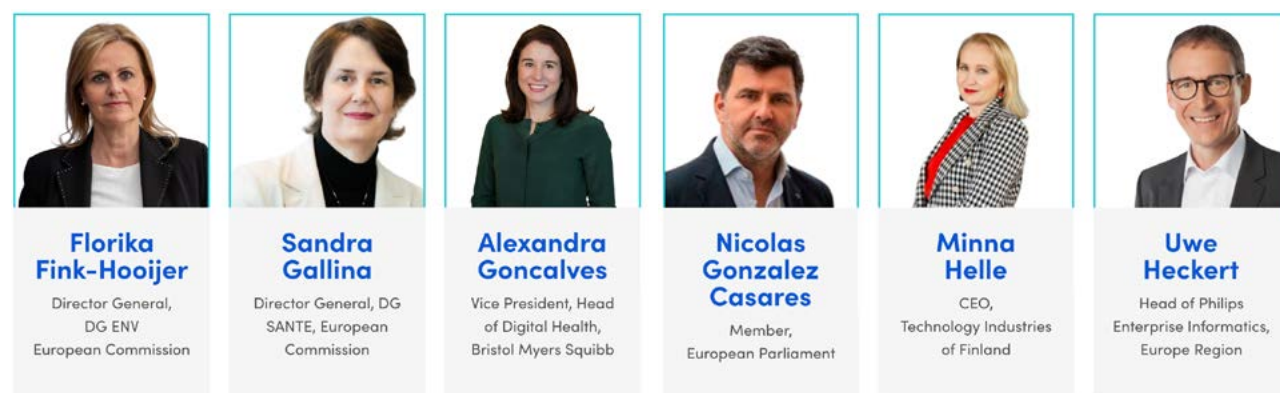
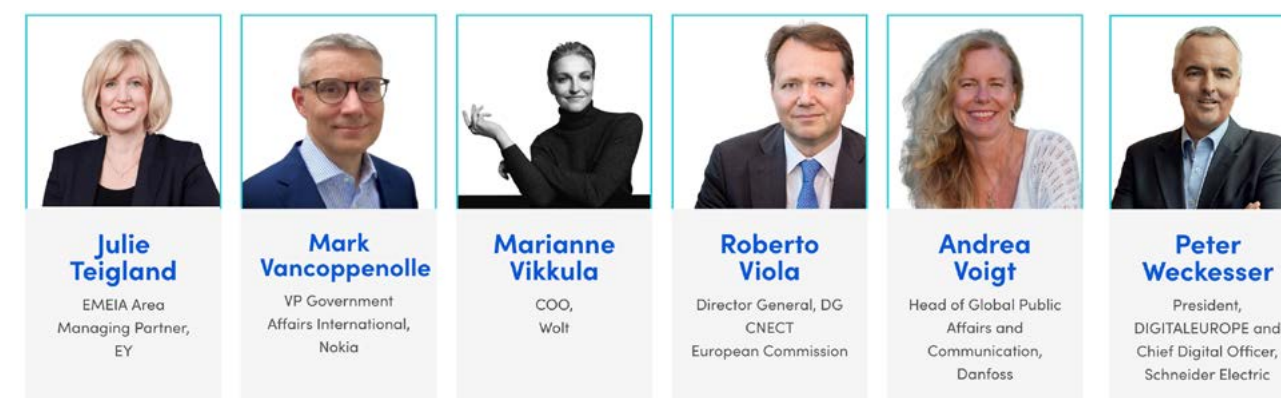
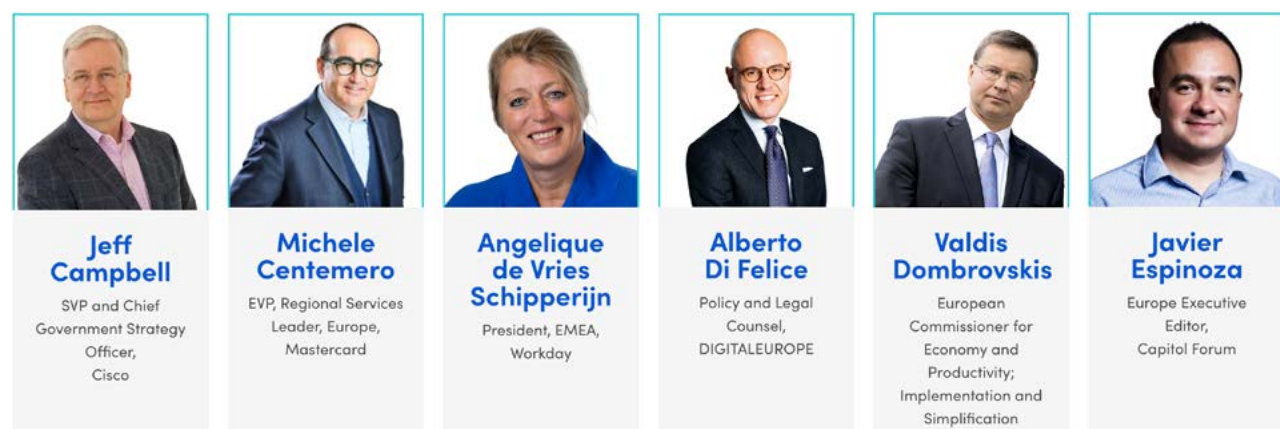
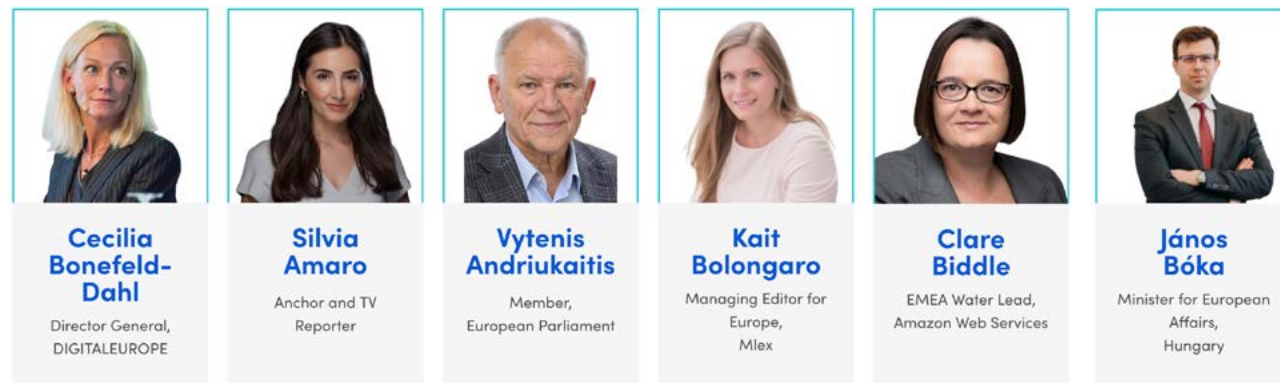


**40**  
speakers





# Speakers





# Opening remarks

Masters of Digital 2025 was officially kicked off by the President of DIGITALEUROPE, Peter Weckesser, and Director-General of DIGITALEUROPE, Cecilia Bonefeld-Dahl delivering opening remarks and delving into the challenges and opportunities of the next years for Europe to win the Tech Race.

## Cecilia Bonefeld-Dahl, DIGITALEUROPE

"The tech race is on, and it is time for us to wake up and do fundamental changes, let's just do what it takes".

We need:

- 1 To cut unnecessary regulation detangle the regulatory bowl
- 2 Simplify, one stop shop is essential for companies
- 3 Incentivise, we need to incentivise on a large scale critical and dual-use tech to protect our infrastructure, as Ukraine has shown us.

## Peter Weckesser, President Digital Europe and Chief Digital Officer of Schneider Electric

### EU is not attractive anymore:

- There is a declining investment by the private and public sector, while security and defence need urgent funding.
- European talent is leaving our borders, as young talent doesn't see their future in Europe anymore.

### Tech can be the solution:

- AI can be a key technology for digital differentiation
- We need smarter energy, as the best energy is the one we don't even have to produce.





# Opening High-Level Panel – Critical Technologies: Driving Europe’s competitiveness in the digital age

This panel focused on how critical technologies can drive Europe’s competitiveness in the digital age. The discussion highlighted the importance of collaboration between governments and businesses, the need for a supportive regulatory environment, and Europe’s role in the global tech race.

Speakers emphasized that data is a key resource, and Europe must trust its companies to innovate rather than burden them with excessive regulations. There was strong optimism about AI and digital transformation, with calls for better infrastructure, secure data sharing, and strategic investments to help European companies compete globally.

A major theme was the need for Europe to use its own digital solutions and leverage its diversity as a strength. While challenges like administrative burdens and overregulation exist, the panel agreed that the race isn’t over: Europe still has time to lead in AI and tech innovation if it creates the right environment for growth.



## Key takeaways from the panelists:

**Liisa-Ly Pakosta**, Minister of Justice and Digital Affairs, Estonia

“Innovation never comes from bureaucrats. The innovation comes from companies”

**Roberto Viola**, Director General, DG CNECT, European Commission

“We will make sure that our strength, our people, our data will be unlocked by doing something that European companies cannot do: amassing enough capital”

**Rolf Schumann**, CDO, Schwarz Group and Co-CEO, Schwarz Digits

“Data is the fuel of AI. And AI is the future of our societies”

**Jean-Marc Ollagnier**, Chairman EMEA, Accenture

“EU companies are investing in AI, matching the US at 80%. There’s still room to improve, but AI is a big change, and the single market can get better”.

**János Bóka**, Minister for European Affairs, Hungary

“if the European Union would be part of the solution when it comes to overregulation and administrative burden, then we would be further ahead”





# The Future of Work in the Age of AI

This keynote explored how AI fundamentally reshapes work, accelerates business processes, and unlocks new opportunities for public and private organisations. The speaker highlighted that AI is not just about automation but about a new phase of business transformation, where AI agents work alongside humans to improve efficiency and productivity.

The speaker emphasised that AI can help businesses grow faster than ever before, serving as a powerful tool to streamline tasks and enhance daily operations. With the rise of digital agents, AI will become an integral part of decision-making and workflow optimisation, transforming the way companies operate. The key takeaway was clear: AI is not replacing people, it is augmenting human capabilities, enabling organisations to move faster and innovate more effectively.



## Key takeaways:

**Angelique de Vries Schipperijn**, President, EMEA, Workday

*"AI agent – it will not be only automation, but like a human, performing tasks. This is the next phase. Leveraging the agent's skills will be key. You can see the agent as a person. It will change the way people work"*





# Panel: Europe and the AI Race: will Europe lead or lag?



**This panel explored Europe's position in the global AI race, questioning whether the EU can adapt quickly enough to remain competitive.**

The discussion highlighted the contrast between the EU's structured, regulation-driven approach and the US's aggressive, de-regulated AI development, raising concerns about whether European AI products can keep pace under the current rulebook. Speakers acknowledged that Europe has world-class AI talent, a promising start-up ecosystem, and key technology assets. However, challenges remain in scaling businesses, securing private investment, and ensuring that regulation enables rather than hinders innovation.

Business leaders stressed the need for greater collaboration, data sharing, and strategic investment to help European companies compete globally. A recurring theme was the need for cutting bureaucracy, incentivising AI adoption, and ensuring legislation supports both compliance and growth.

## Key takeaways from the panelists:

**Eva Maydell** Member, European Parliament

"We live in an accelerationist moment – an intensity that affects geopolitics and tech advancements"

**Lucilla Sioli**, Head of AI Office, European Commission

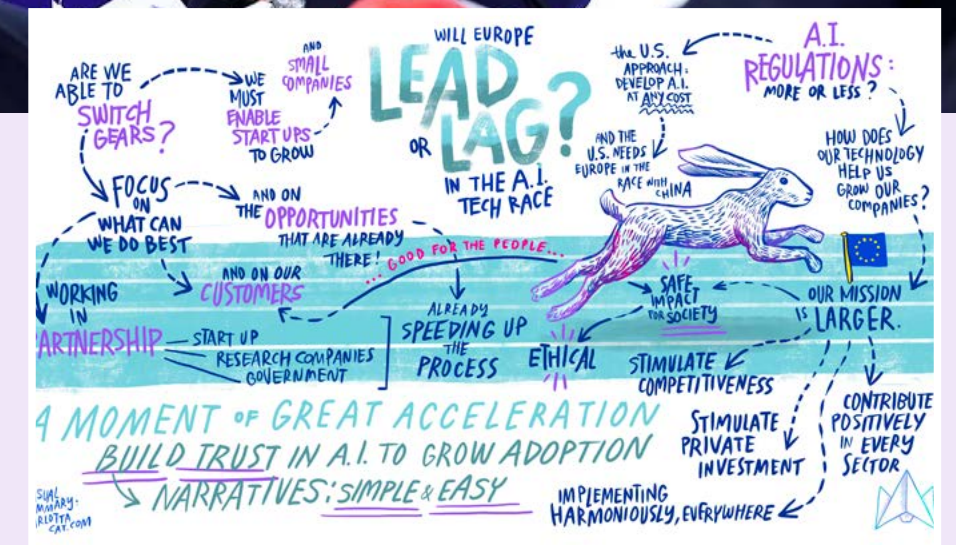
"Half the difference in productivity growth was the slow uptake of digital technologies"

**Uwe Heckert**, CEO, Philips DACH

"There is not so much to do, we just have to do it."

**Marianne Vikkula**, COO, Wolt

"We've been good at waiting and communicating, now is the time to walk the talk"





# Panel: Innovation for Impact: the role of digital technologies in the EU sustainability agenda

This panel examined the role of digital technologies in advancing the EU's sustainability agenda, emphasising the need for greater synergy between digital and green transitions. Conversations focused on how innovation can streamline regulatory processes, improve efficiency, and support climate and environmental goals while ensuring European businesses remain competitive.

A key theme was simplification and the reduction of regulatory burdens, particularly in sustainability reporting. Speakers stressed that data should be leveraged not just for compliance, but for optimisation, enabling companies to make informed decisions and drive meaningful sustainability outcomes. The panel also highlighted the importance of public-private partnerships in fostering innovation and accelerating the deployment of green technologies.

Specific attention was given to water management and energy efficiency, particularly in sectors like data centres, where AI and digital solutions can enhance energy efficiency, optimise water use, and enable waste heat recovery. The discussion reinforced that digital transformation must go hand in hand with sustainability efforts, ensuring that Europe can lead in both innovation and climate action.



## Key takeaways from the panelists:

**Florika Fink Hooijer**, Director General, DG ENV, European Commission

"Water strategy is not only about awareness rising but where innovation and investments have to go"

**Andrea Voigt**, Head of Global Public Affairs & Communication, Danfoss

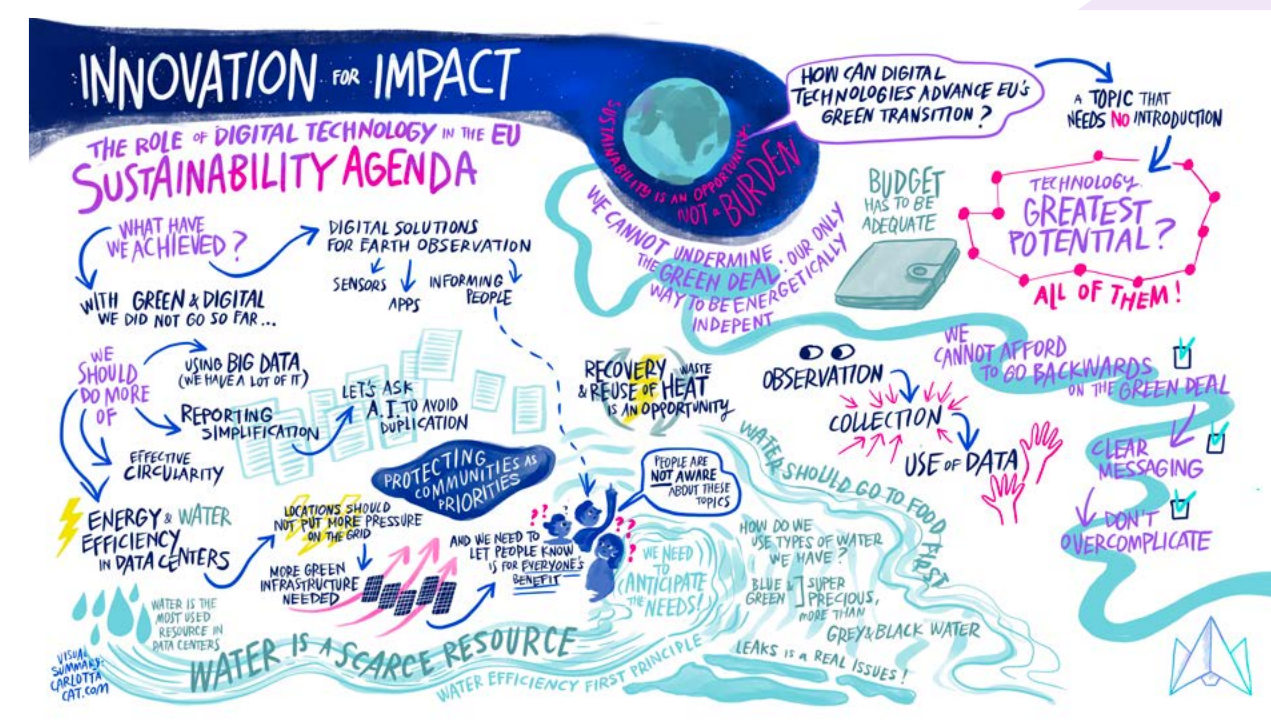
"Cooperation among stakeholders is needed to integrate solutions and ensure business success"

**Nicolas González Casares**, Member, European Parliament

"We need to deploy AI in the EU to remain competitive while respecting the Green Deal, which is key to achieving energy independence through decarbonisation"

**Clare Biddle**, EMEA Water Lead, AWS

"We shall not miss the opportunity to simplify and enable smart decisions"





# Panel: Data for Innovation – what will the world look like in 2030?

This panel explored the transformative role of data and AI in shaping Europe's digital and economic future, with a strong emphasis on trust, collaboration, and regulatory simplification.

The discussion underscored that data is a fundamental driver of innovation, essential for business growth, improved services, and global competitiveness. However, challenges remain in ensuring high-quality, accessible data, reducing regulatory duplication, and fostering trust among businesses and consumers.

Speakers stressed the need for coherent, EU-wide digital investment strategies that prevent fragmentation and allow companies to scale across the Single Market. They also highlighted the importance of removing silos between industries, integrating AI into supply chains, and ensuring digital identity frameworks that protect privacy while unlocking new economic potential.

Europe's regulatory approach must evolve, shifting from excessive reporting burdens towards a framework that enables companies to innovate with confidence. Without bold moves, speakers warned, Europe risks falling behind in the global tech race.



## Key takeaways from the panelists:

**Michele Centemero**, EVP, Regional Services Leader, Europe, Mastercard

"The barriers to utilisation of the data we have are: Usability of the data, quality of the data and right access to it"

**Minna Helle**, CEO, Technology Industries of Finland

"Data sharing is the key for innovation. Collaborating with other companies and customers is a must but this has to be based on trust. Without it, collaboration, data sharing cannot be possible"

**Sandra Sarav**, Deputy Secretary General for Economy and Innovation, Estonia

"We need to listen to companies and end users more. In the single market when we speak to key companies, if we do not understand what we are regulating how can we regulate it properly"

**Katie McGinty**, Vice President and Chief Sustainability and External Relations Officer, Johnson Controls

"Data, digital, and AI are disruptive forces. Businesses are holding back capital, but instead of sitting on it, we should direct that money into innovation. We can become a tech leader by working together: without always needing more funding."



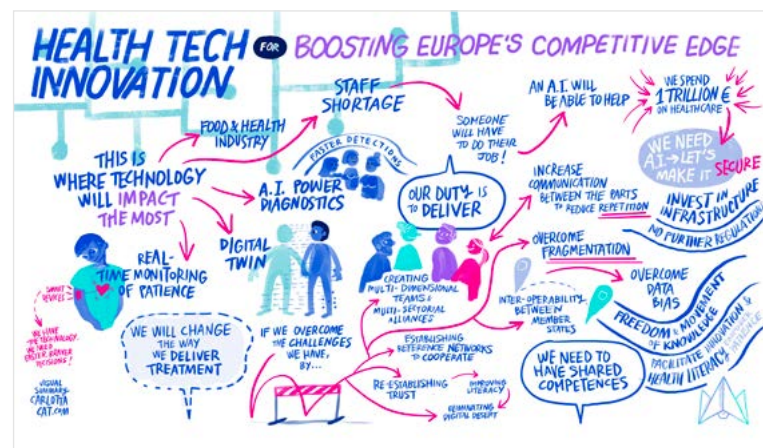


# Panel: Health Tech and Innovation: Boosting Europe's competitive edge

With the right approach, health tech can make Europe's healthcare systems more digital, sustainable, and accessible for the future.

AI is already transforming drug development and diagnostics, making treatments faster and more efficient. However, challenges like fragmented regulations, lack of trust, and digital literacy gaps must be addressed.

Panelists emphasized that Europe has world-class institutions and strong foundations, but it must invest strategically, cut regulation, and empower both healthcare workers and patients through digital skills.





# The Future of Transatlantic Cooperation: What lies ahead of businesses?

This panel explored the future of transatlantic cooperation in tech, highlighting the need for harmonized rules, stronger cybersecurity strategies, and greater investment in AI and digital infrastructure.

Speakers emphasized that the EU and US share deeply connected economies and must work together to protect their security and competitiveness. Investment was also a key theme, with calls for the EU to boost AI adoption, build data centers, and upskill its workforce. The discussion reinforced that speed, collaboration, and the right policies are essential for strengthening transatlantic tech leadership.

## Key takeaways from the panelists:

**Jeff Campbell**, SVP and Chief Government Strategy Officer, Cisco

"Our economies are deeply intertwined, and we've all benefited from this close transatlantic relationship that drives innovation: let's not unscramble that egg."

**Dariusz Standerski**, Secretary of State at the Ministry of Digital Affairs of Poland

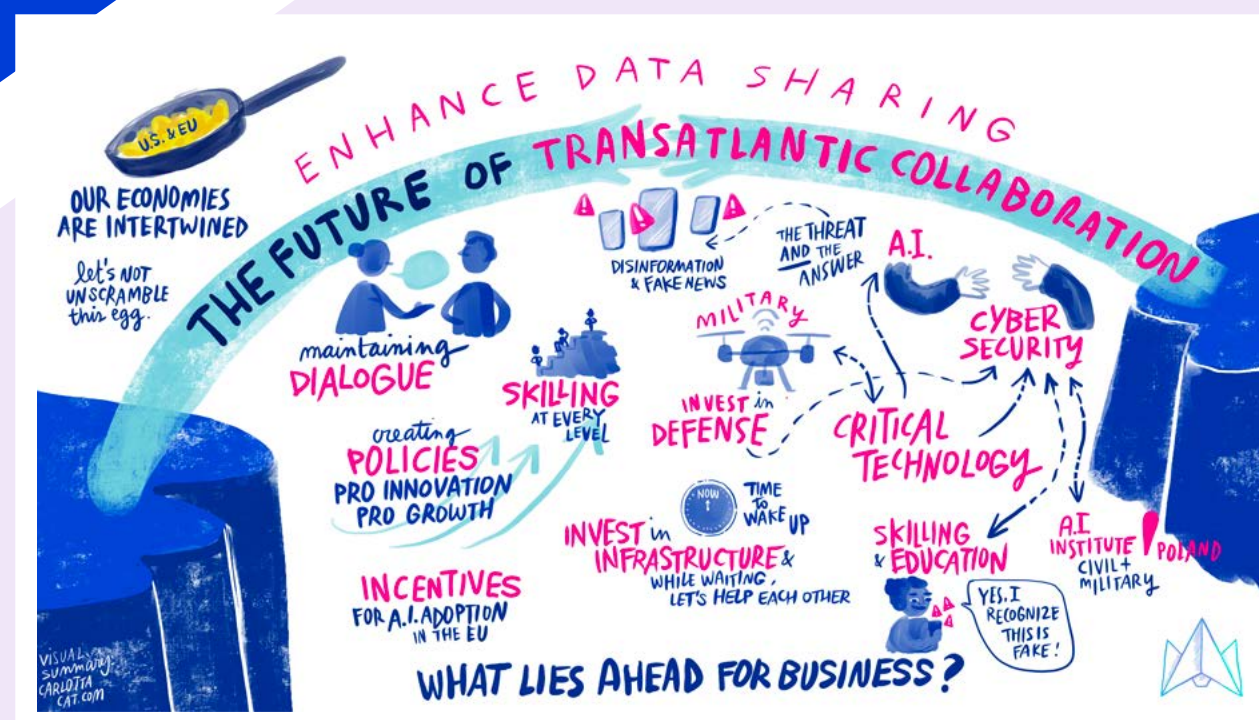
"In light of US withdrawal of support, the EU needs to merge three important perspectives: cyber, digital and military"

**Nanna-Louise Linde**, Head of Government Affairs, Europe, Microsoft

"We need to bring each other strengths, bring more collaboration and we need more skills and education against cyberthreats"

**Alex Arapov**, Chief Product Officer, Swarmer

"The top priority in transatlantic cooperation should be speed: speed saves lives and means adopting innovation faster."





# Panel discussion: Fireside chat- Tech as a catalyst: transforming Europe into a competitive and attractive powerhouse

This session explored how technology can drive Europe's competitiveness, with a focus on foreign direct investment (FDI), regulatory challenges, and the need for stronger collaboration between businesses and policymakers.

The exchange highlighted Europe's declining FDI trends, the impact of high energy prices, and the need for a more business-friendly environment to support innovation and growth.

Panellists showcased the importance of simplification without deregulation, advocating for reducing administrative burdens, fostering digitalisation, and creating incentives for investment in strategic sectors. The conversation also touched on Europe's need to scale up its companies more effectively, ensuring the Single Market provides the right conditions for businesses to grow and compete globally.

A key theme was the role of sustainability reporting, with concerns raised about excessive compliance burdens. Instead, reporting should be used as a tool for business transformation, helping companies measure real progress rather than just fulfilling regulatory requirements. The discussion concluded with a call for stronger public-private dialogue, ensuring that industry voices help shape policies that promote both economic growth and sustainability.



## Key takeaways from the panelists:

**Julie Linn Teigland**, EMEA Area Managing Partner, EY

"We are our worst enemy, we are divided, we do not speak the same language, and we do not have faith that problems can be addressed. More dialogue is needed to find trust across tables"

**Valdis Dombrovskis**, Commissioner, European Commission

"We are very clear on emphasising that simplification is not deregulation. We are not abolishing our policy goals or standards; we are just looking at how to reach goals in a simpler and cost-efficient way"

**Peter Weckesser**, President of DIGITALEUROPE and Chief Digital Officer, Schneider Electric "Companies are investing to reduce energy consumption, but are these investments significant enough, and is the return fast enough?"





# Panel – Future of connectivity in Europe: building Europe's digital backbone

This panel examined Europe's connectivity landscape, highlighting challenges in infrastructure deployment, regulatory fragmentation, and spectrum management.

While Europe leads in connectivity research and development, its slow rollout of 5G and fibre networks threatens its competitiveness. Speakers stressed that robust digital infrastructure is essential not only for economic growth but also for security and AI adoption.

A key concern was the lack of coordination in spectrum allocation, with calls for a more unified EU-wide approach to accelerate 5G and prepare for 6G. The discussion also showcased the geopolitical significance of connectivity, emphasising the need for greater digital sovereignty and reduced reliance on external players. Strengthening the Single Market for telecommunications, securing strategic investments, and simplifying regulations were seen as priorities for ensuring Europe remains competitive in the global digital economy.



## Key takeaways from the panelists:

**Renate Nikolay**, Deputy Director General, DG CNECT, European Commission

"We are behind schedule when it comes to fibre rollout and 5G"

**Michal Kobosko**, Member of the European Parliament

"We cannot stay dependent on other players because other countries are turning their back towards us"

**Tom Smyth**, CEO, Wireless Connect

"While regulatory burden can be hard for big businesses, it is terminal for small businesses"

**Marc Vancoppenolle**, VP of Government Affairs International, Nokia

"There is no AI and no digitalisation without connectivity"





# Closing Remarks

**As Masters of Digital 2025 came to an end, one message is clear: Europe must act with urgency to lead the global tech race.**

Over the past sessions, we have explored AI, connectivity, sustainability, investment, and transatlantic cooperation, all pointing to the same conclusion: simplification, investment, and innovation must go hand in hand.

The EU has the talent, the infrastructure, and the ambition to succeed, but we need bolder action: cutting red tape, enabling growth, and fostering a competitive business environment. Digital transformation is not a choice but a necessity for Europe's security, sustainability, and economic strength. Now is the time to step up, collaborate, and drive Europe's digital future forward.





# Gala Dinner and Future Unicorn Award

The gala dinner took place the evening before the main event on 19 February at Théâtre du Vaudeville, where we welcomed over 125 high level guests.

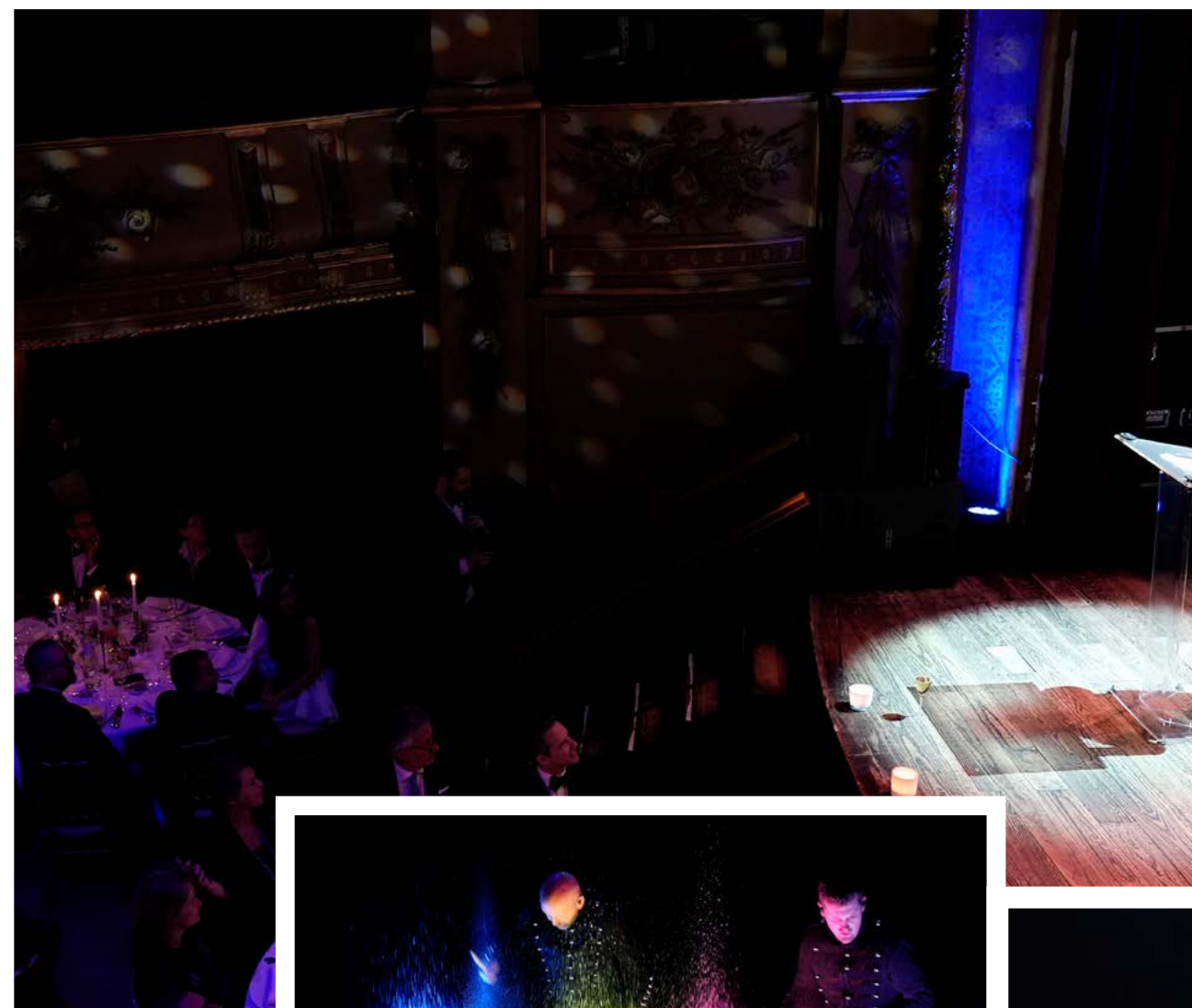
The winners of the Future Unicorn Award were announced by Ekaterina Zaharieva, European Commissioner for Startups, Research and Innovation. For the first time ever, the award featured two categories:

- Future Unicorn, recognizing the potential to become Europe's next tech unicorn, was awarded to Pactum AI (Estonia).
- Dual-Use Technologies, celebrating innovations with applications in both civilian and military domains, was awarded to Quantum Systems (Germany).

## About the Future Unicorn Award

Since 2018, the Future Unicorn Awards stands as a beacon of excellence in Europe's tech ecosystem. More than just a prize, it is an initiative designed to showcase Europe's future tech champions and elevate their voices within EU policy-making circles.

At DIGITALEUROPE, we have set a bold objective in our manifesto: to double the number of European unicorns by 2030. This award is pivotal in realising that vision, by providing a platform that propels companies into the next phase of growth and innovation.





# DIGITALEUROPE-NATO Joint Innovation Event: Shaping the future of digital defence

On 19 February 2025, in Brussels, DIGITALEUROPE and NATO hosted the Joint Innovation Event: Shaping the Future of Digital Defence – Harnessing Innovation to Strengthen NATO's Strategic Edge.

This event gathered key stakeholders from both the private sector and government to explore strategies, such as Assistant Secretary General of NATO, Jean Charles Ellerman-Kingombe and the Deputy Minister of Defence of Ukraine, Kateryna Chernohorenko.

Through three insightful panels led by industry experts, participants concluded that SMEs play a key role in driving innovation in the defence sector. However, they face challenges like slow processes, lack of funding, and heavy regulations. To foster growth, Europe must speed up its processes, encourage investment in new technologies, and support SMEs with finalized contracts and access to essential defence data.

This landmark event provided an essential platform for shaping the future of defence and advancing its digital transformation, ensuring it remains resilient and prepared for emerging challenges.





# Our first Defence Executive Council

As emerging technologies reshape global security, on 19 February 2025 we launched at Steigenberger Wiltcher's Hotel our first Defence Executive Council. This Council unites top executives from defence, cybersecurity, and tech industries to help shape policies that boost resilience, competitiveness, and strategic autonomy.

## Key Takeaways:

- Europe's fragmented defence procurement system slows innovation and increases costs.
- 179 different weapon systems exist across EU nations compared to 33 in the U.S., creating inefficiencies.
- Defence innovation must match the fast cycles of the tech industry (2–6 weeks) rather than rigid government processes.
- 5G & 6G networks are essential for battlefield operations, but military infrastructure lags behind commercial advancements.

## Policymaker reactions

- The European Defence Agency (EDA) stressed the political reluctance to scale up joint EU procurement despite its potential.
- NATO officials emphasized the need for faster, structured technology adoption with early end-user involvement.
- The European Investment Bank (EIB) proposed Defence Bonds to ensure stable funding for digital defence projects.





# Masters of Digital Award

The Master of Digital Award was given out for the first time in 2021 to recognise individuals who have been trailblazers in digital transformation.

This year, Enrico Letta received the award for his work in breaking down barriers within the Single Market, ensuring it functions as a truly unified space. His contributions have made a lasting impact, making him a worthy recipient.



# Roundtable with Commissioner Valdis Dombrovskis

During the event, we hosted a closed-door executive roundtable with Commissioner Valdis Dombrovskis and 14 top technology leaders to discuss Europe's digital and economic future.



## Discussions highlighted:

- Ensuring competition law enables, rather than hinders, European champions.
- The need to reduce duplicative regulations that slow down innovation.
- Addressing lengthy compliance processes, which take up to two years in the EU compared to six months in the U.S.
- A shift from overregulation to value-driven policies and incentives, particularly in AI, cybersecurity, healthcare, and SMEs & Startups

## Commissioner Dombrovskis' Response

The Commissioner acknowledged concerns and outlined steps for simplification and competitiveness, including:

- A biannual stakeholder dialogue with industry.
- A review of EU laws to identify areas for simplification.
- Targeted reforms in key areas like REACH, AI, and medical devices.



# Celebration of DIGITALEUROPE's 25th anniversary

*We have turned 25! And we marked this milestone right after the Masters of Digital event, bringing the celebration to a fitting close. The occasion was made even sweeter with a giant cake and 100 cupcakes shared among our community.*

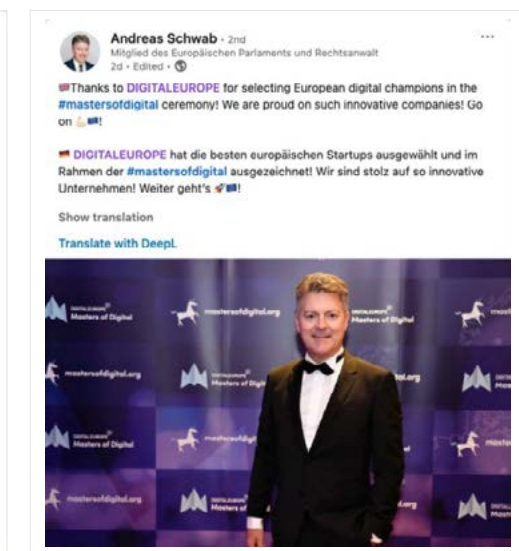
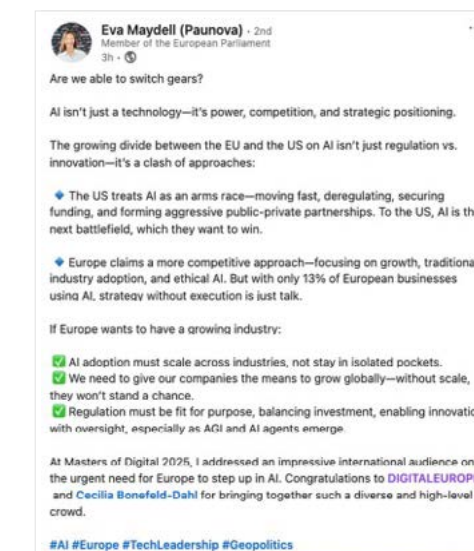




# In-Person and Virtual Exhibitions



# MoD Online





# Sponsors

This year’s event was graciously sponsored by:



# 2026 Sponsorship Opportunities

	€55,000	€40,000	€20,000
Benefits	Gold	Silver	Bronze
Named as a sponsor (at selected level) with logo on relevant event materials	✓	✓	✓
Guaranteed and complimentary delegate places at the on-site element (due to venue capacity restrictions) in addition to your speaker (if applicable)	3	2	1
Place at exclusive VIP additional events (dinner, lunch etc. where organised)	2	1	1
Opportunity to have an exhibition booth at the venue - <i>to ensure maximum impact we ask that this is a hands on and exciting experience for attendees. DIGITALEUROPE are to sign off on all booths to guarantee audience satisfaction</i>	✓		
Guaranteed speaking slot - <i>session choice to be discussed and agreed with DIGITALEUROPE, stage dependent on registrations and room capacities</i>	✓	✓	✓ Second Stage
Opportunity to help shape the chosen session your company representative will be participating in, including audience polls	✓		
Opportunity to host video content or documents online for the virtual audience	✓	✓	
Video interview opportunity with your speaker - with a clip included in the event highlights video, and a full interview edited into a standalone video (filmed at event)	✓		
Access to booking private meeting rooms for bilateral meetings on site and assistance with coordinating meetings with other event speakers and VIPs	✓	✓	



# About DIGITALEUROPE

**DIGITALEUROPE is the leading trade association representing digitally transforming industries in Europe.**

We stand for a regulatory environment that enables European businesses and citizens to prosper from digital technologies. We wish Europe to grow, attract and sustain the world's best digital talents and technology companies.

Together with our members, we shape the industry policy positions on all relevant legislative matters and contribute to the development and implementation of relevant EU policies. Our membership represents over 45,000 businesses who operate and invest in Europe. It includes 109 corporations which are global leaders in their field of activity, as well as 41 national trade associations from across Europe.

## **Our Mission**

As leaders of digital industries, we engage with policymakers and citizens to shape a more secure and competitive business environment for a stronger digital Europe.

## **Our Vision**

We strive for a Europe leading on digital for its people, its businesses, and the climate.

## **About Masters of Digital**

Masters of Digital is our annual flagship summit and Europe's largest digital policy conference. Every February, we bring together top EU policymakers, digital industry leaders, and representatives from academia and civil society to shape the EU digital policy agenda for the year to come. Masters of Digital has seen the participation of European Presidents and Commissioners, Members of the European Parliament, national ministers and C-suite representatives of the largest digital businesses in Europe and beyond.

Now in its eighth year, and under the theme "Europe 2030: A Digital Powerhouse", Masters of Digital delved into the profound impact of AI and emerging technologies on Europe's economy, society, and sustainability. The conference explored the transformative potential of digital innovation in fostering economic growth, driving





# #MOD2025

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