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OECD REVIEWS OF DIGITAL TRANSFORMATION
GOING DIGITAL IN SWEDEN

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OECD Digital Economy Policy



Background to the Review

- OECD-wide “*Going Digital*” project
- Aims to an integrated policy framework:
 - interconnections across policy domains
- Review of Sweden is an opportunity:
 - for Sweden, to benefit from GD ongoing work
 - for GD, to test its (evolving) policy framework



The Review

Chapter 1. Sweden in the digital transformation: opportunities and challenges

Chapter 2. Infrastructure for the digital economy

Chapter 3. Fostering the digital transformations among individuals, firms and in the government

Chapter 4. Digital security policy

Chapter 5. Seizing the opportunities from digitalisation

Chapter 6. Policy recommendations



Chapter 1. Sweden in the digital transformation: opportunities and challenges

Sweden among the best performing economies in recent years:

- fast growth in GDP per capita
- drop in unemployment
- despite large population increase

Sweden among the leaders in the diffusion and use of digital technologies:

- digital divides (age, education, income and firms' size) are narrower
- broadband availability, quality and affordability among the best in OECD

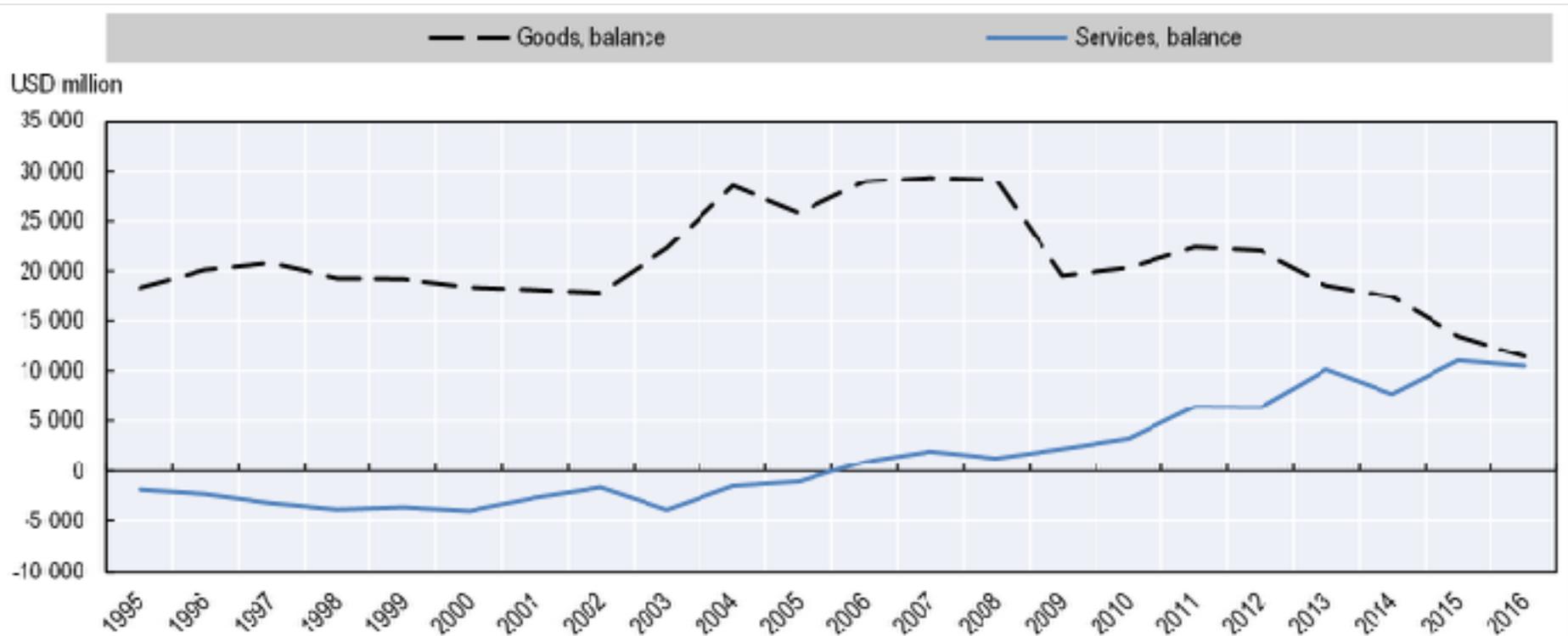
Digital transformation has been a main driver of strong economic performance in Sweden:

- highest share ICT in value added in OECD
 - among the top ten exporters of ICT services worldwide
 - upgrade along GVCs in manufacturing
 - focus on high value-added services
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Chapter 1. Sweden in the digital transformation: opportunities and challenges

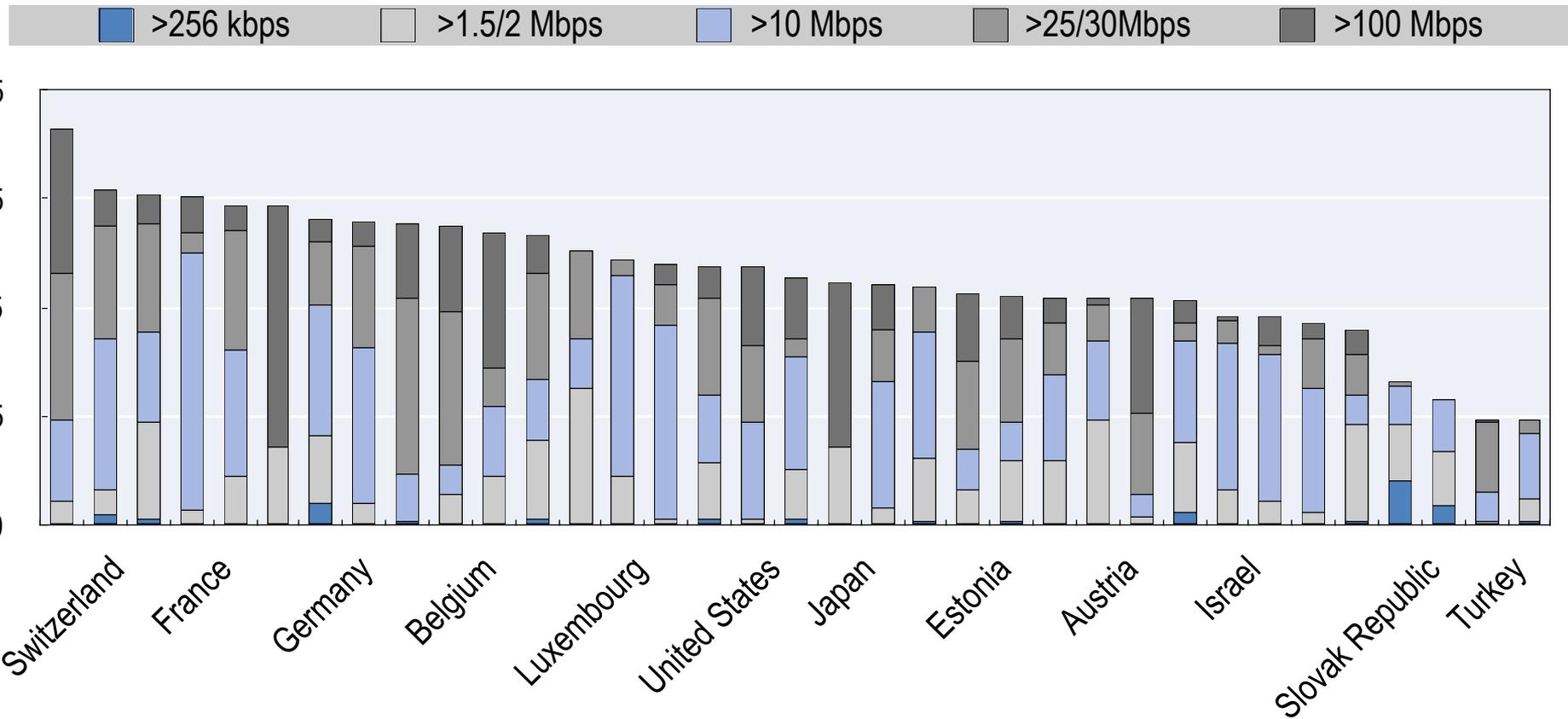
Net exports of goods and services from Sweden





Chapter 2. Infrastructure for the digital economy

Fixed broadband subscriptions per 100 inhabitants, per speed tiers December 2016





Chapter 2. Infrastructure for the digital economy

Policy recommendations to foster connectivity:

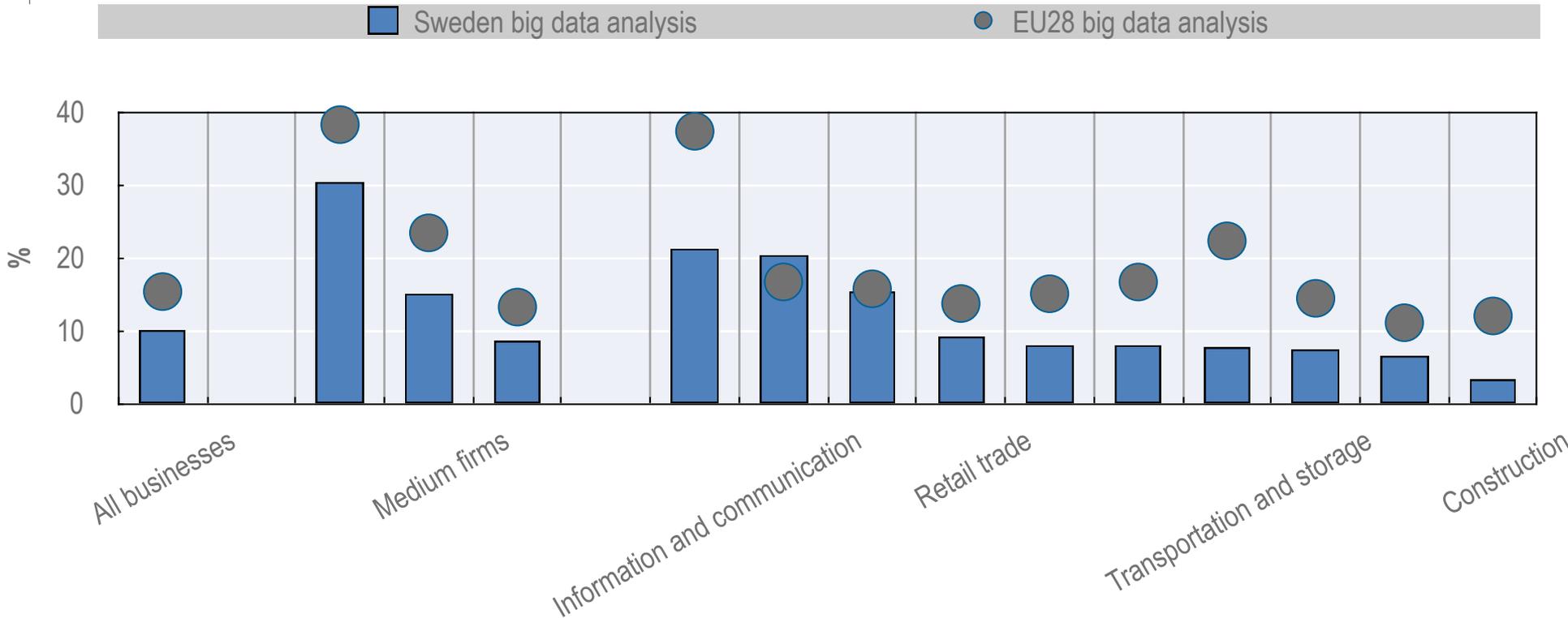
- Enhance coordination among national and regional/local plans for broadband (fibre) deployment – stronger role for the Broadband Forum (BF)
- Promote deployment of high-speed broadband networks in sparsely populated areas – closer coordination among PTS, BF and the Digitalisation Council
- Foster robust fibre networks – stronger role for PTS and BF
- Spur the uptake of IPv6 – increase competition in infrastructure provision, raise government's incentives to adoption



Chapter 3. Fostering the digital transformations among individuals, firms and in the government

Firms performing big data analysis, 2016

% of non-financial firms, by firm size and sector

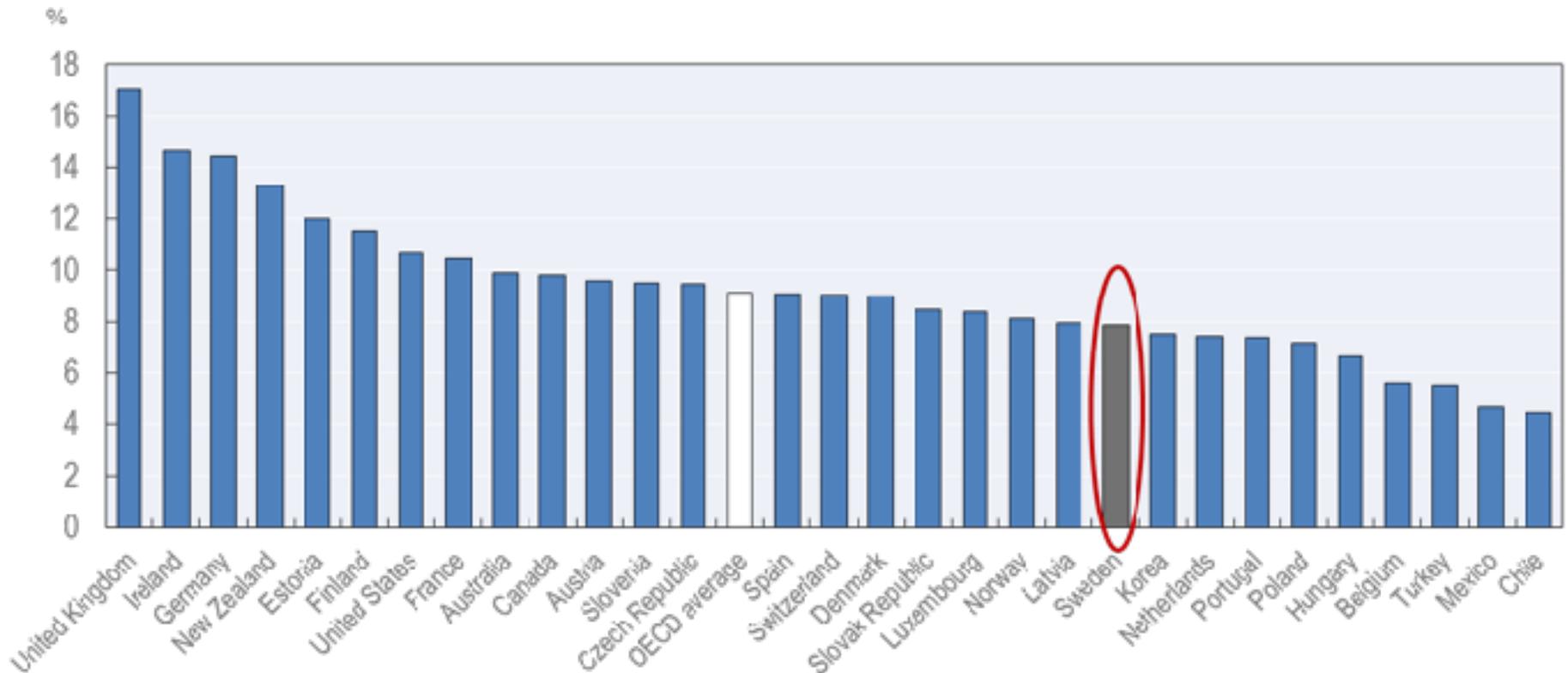




Chapter 3. Fostering the digital transformations among individuals, firms and in the government

Tertiary graduates in ICT and data specialist studies, 2015

% of all tertiary graduates

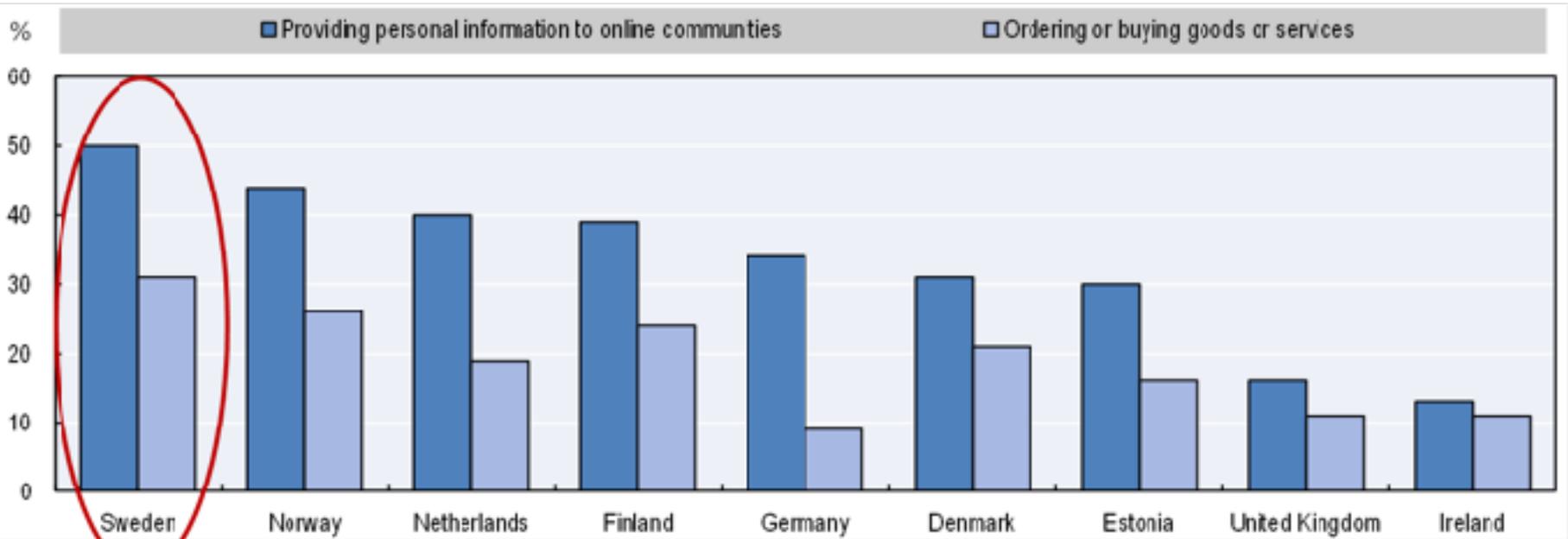




Chapter 4. Digital security policy

Individuals who did not carry out Internet activities because of security concerns, 2015

As a proportion of all individuals aged 16-74 years





Chapter 4. Digital security policy

Policy recommendations to strengthen digital security

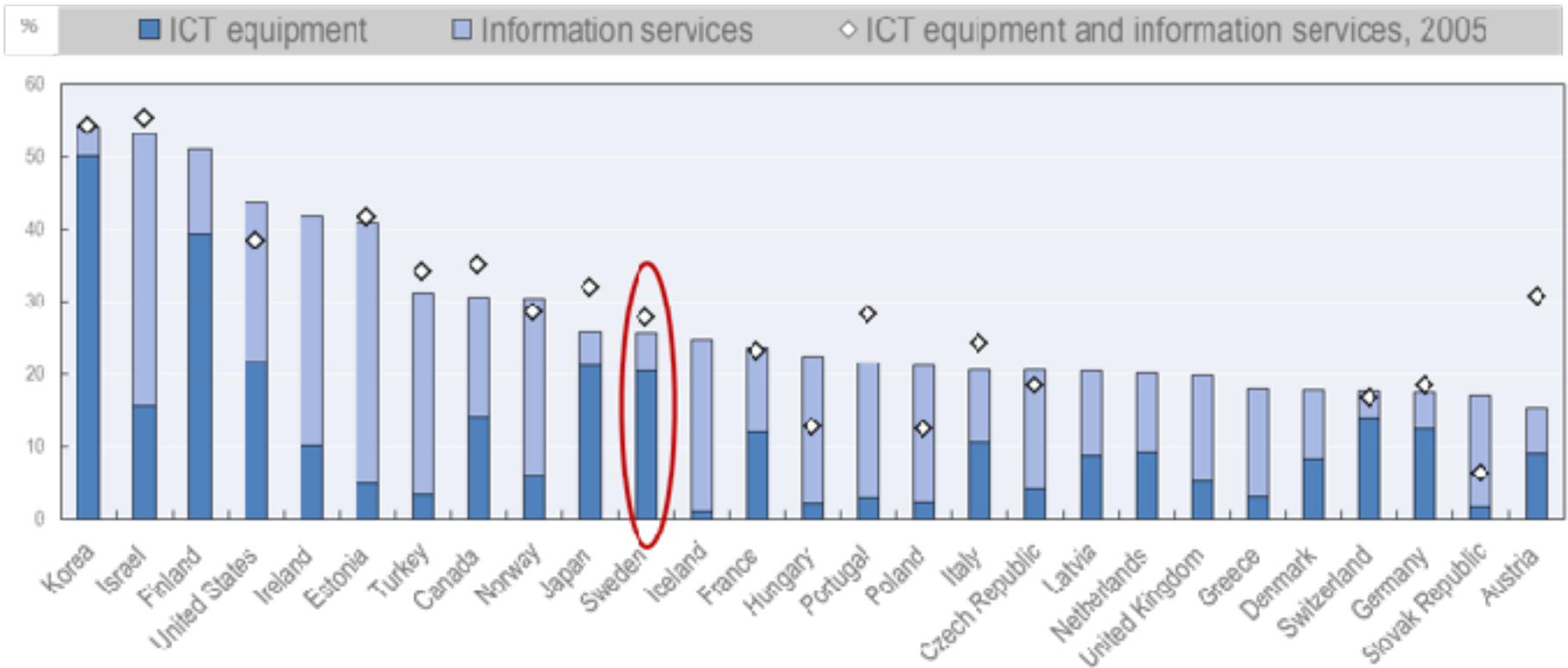
- Promote a clearer vision of digital security risk management as:
 - an economic and social responsibility
 - of leaders and decision-makers
 - in public and private organisations
- Provide policy leadership on the economic aspects of digital security, by strengthening Ministerial co-ordination
- Promote the Digitalisation Council as a hub for co-operation on economic & social digital security issues
- Develop adequate mechanisms for policy co-ordination on digital security, taking stock of the different approaches among OECD countries.



Chapter 5. Seizing the opportunities from digitalisation

ICT-related patents, 2002-05 and 2012-15

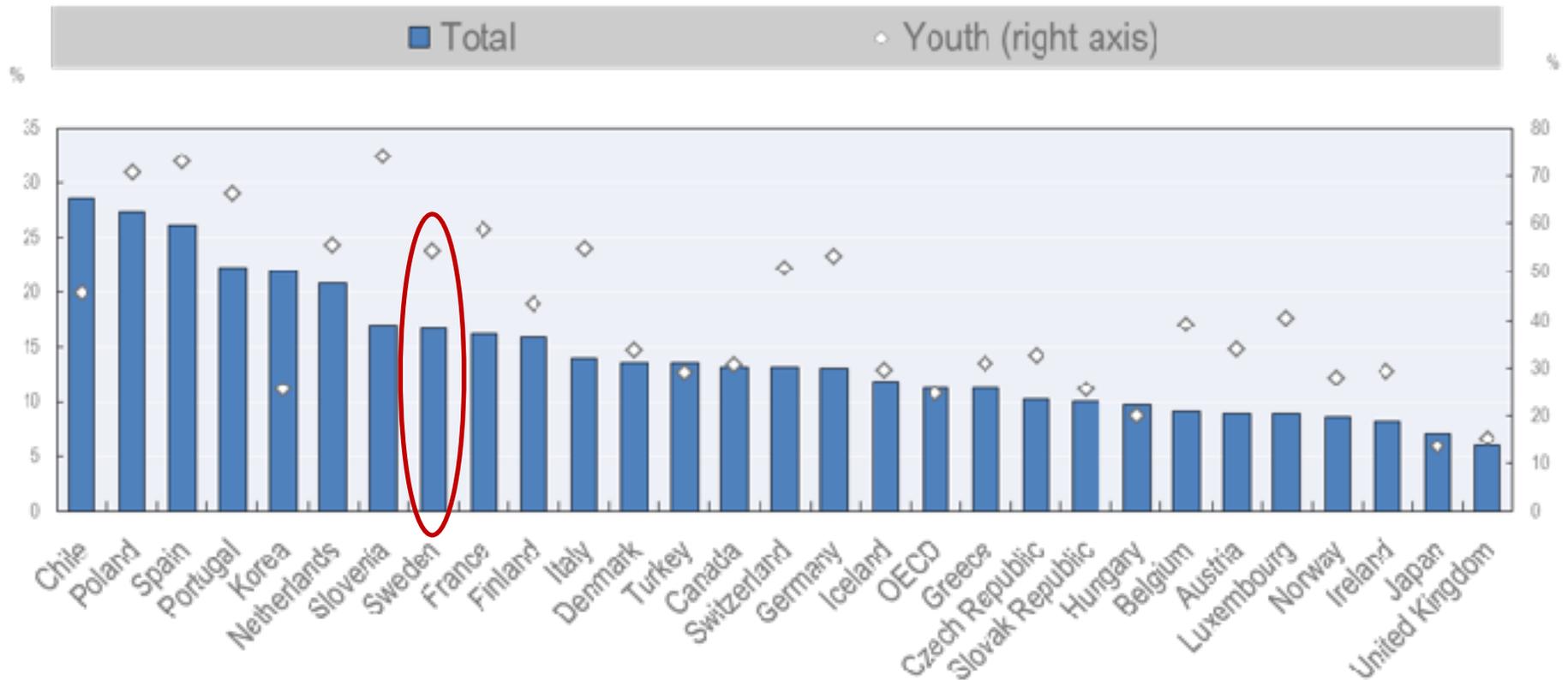
As a percentage of total IP5 patent families owned by economies





Chapter 5. Seizing the opportunities from digitalisation

Incidence of temporary workers in dependent employment 2016





A new Digital Strategy for Sweden

- A new Digital Strategy (DS) in 2017
- DS' goal is for Sweden to be the best in the world in the use of digitalisation opportunities
- DS sets 5 targets to achieve this goal:
digital literacy, digital security, digital innovation, digital leadership and digital infrastructure

Turning the Digital Strategy into policy actions

- Link the DS targets to policy instruments, with quantifiable objectives
- Assign institutional responsibilities for DS targets, to facilitate policy coordination and increase accountability
- Provide for clear appropriations in the Budgetary Bill, to signal the government's commitment to the Strategy
- Build a whole-of-government policy approach to digital transformation



Improving governance for the digital transformation

3 recent initiatives to increase co-ordination :

- Digitalisation Council (2017)
- Agency for Digital Government (01/09/2018)
- Chief Digital Officer (2018)

Good steps but...

...need for stronger co-ordination mechanisms among Ministries, agencies and levels of government...

... possibly through an appropriate matching grants scheme