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Swedish Ministry of Enterprise  
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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

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- 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

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**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

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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

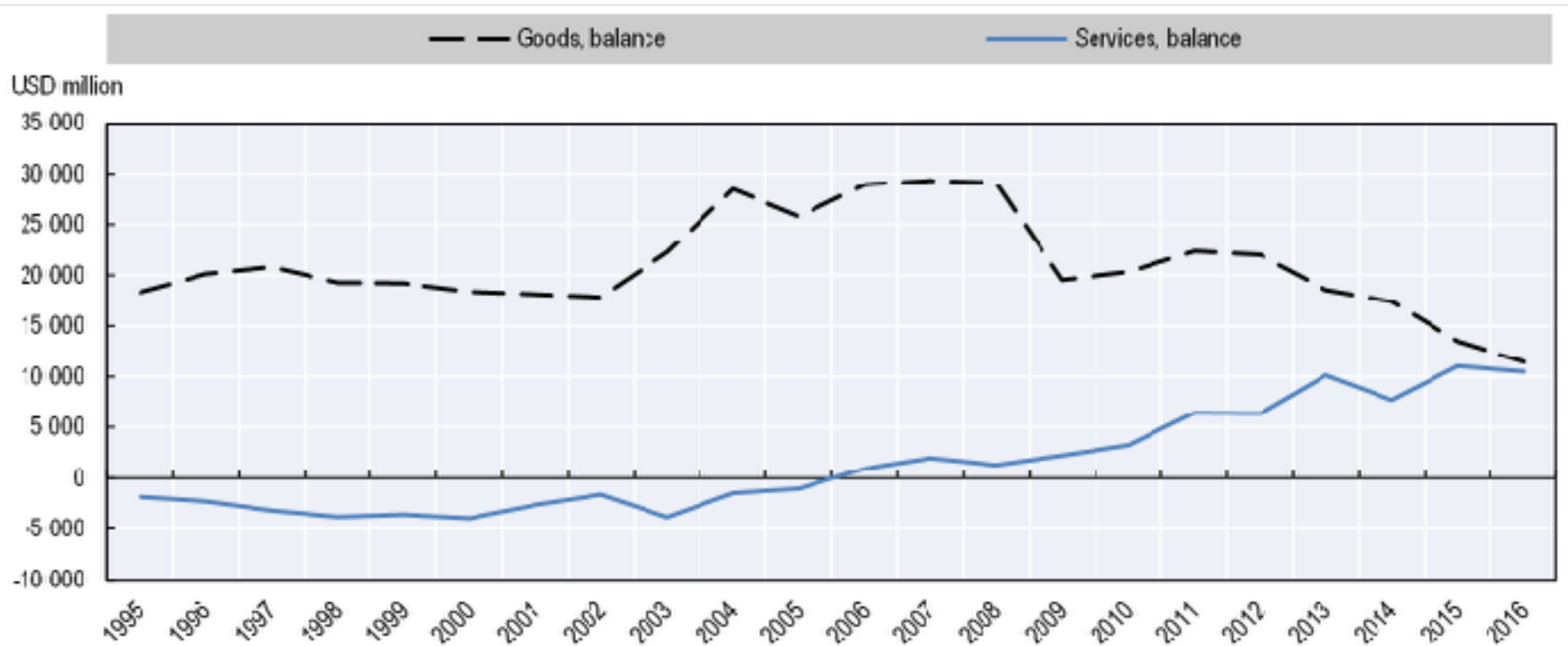
Digital transformation has been a main driver of strong economic performance in Sweden:

- 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

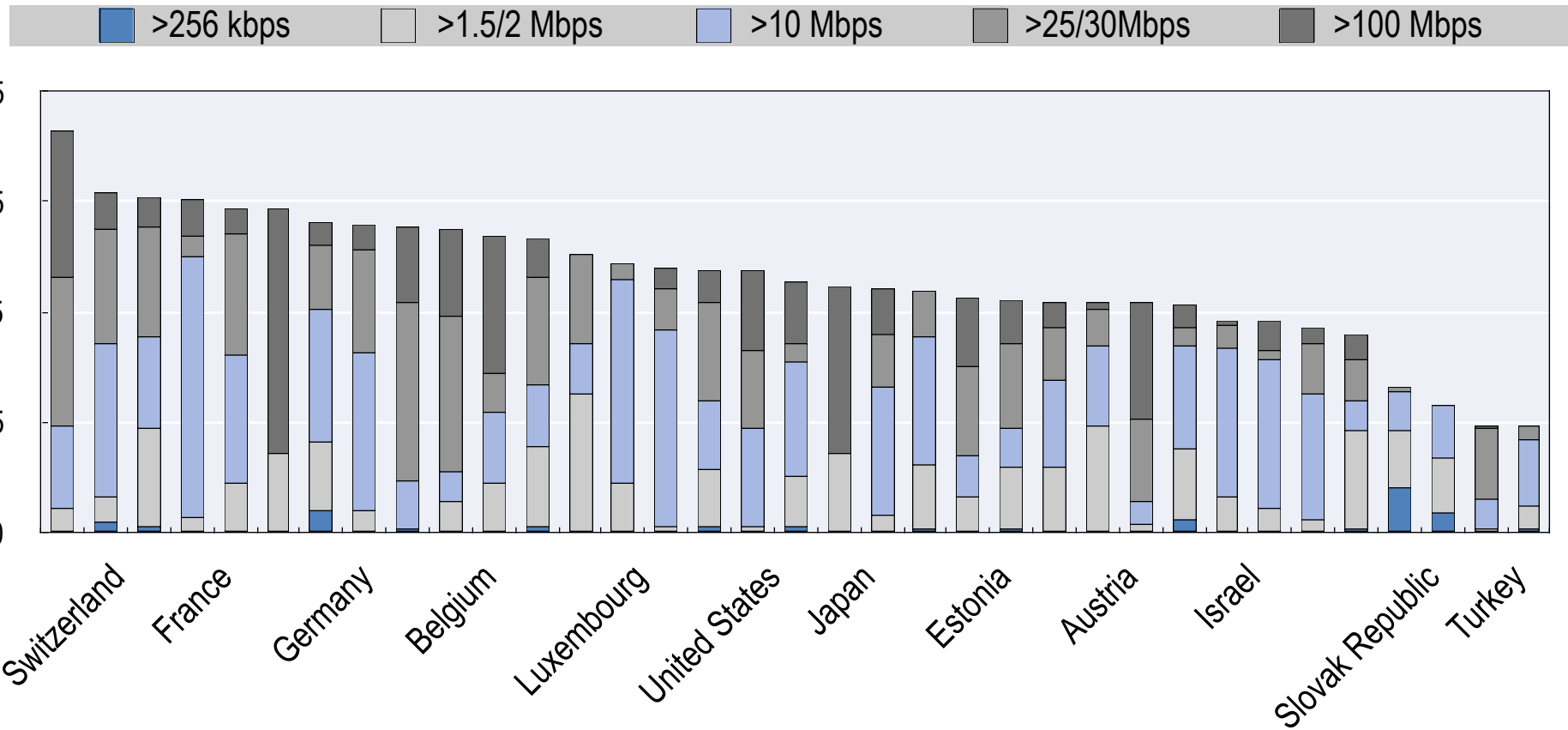
## Net exports of goods and services from Sweden





# 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

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### **Policy recommendations to foster connectivity:**

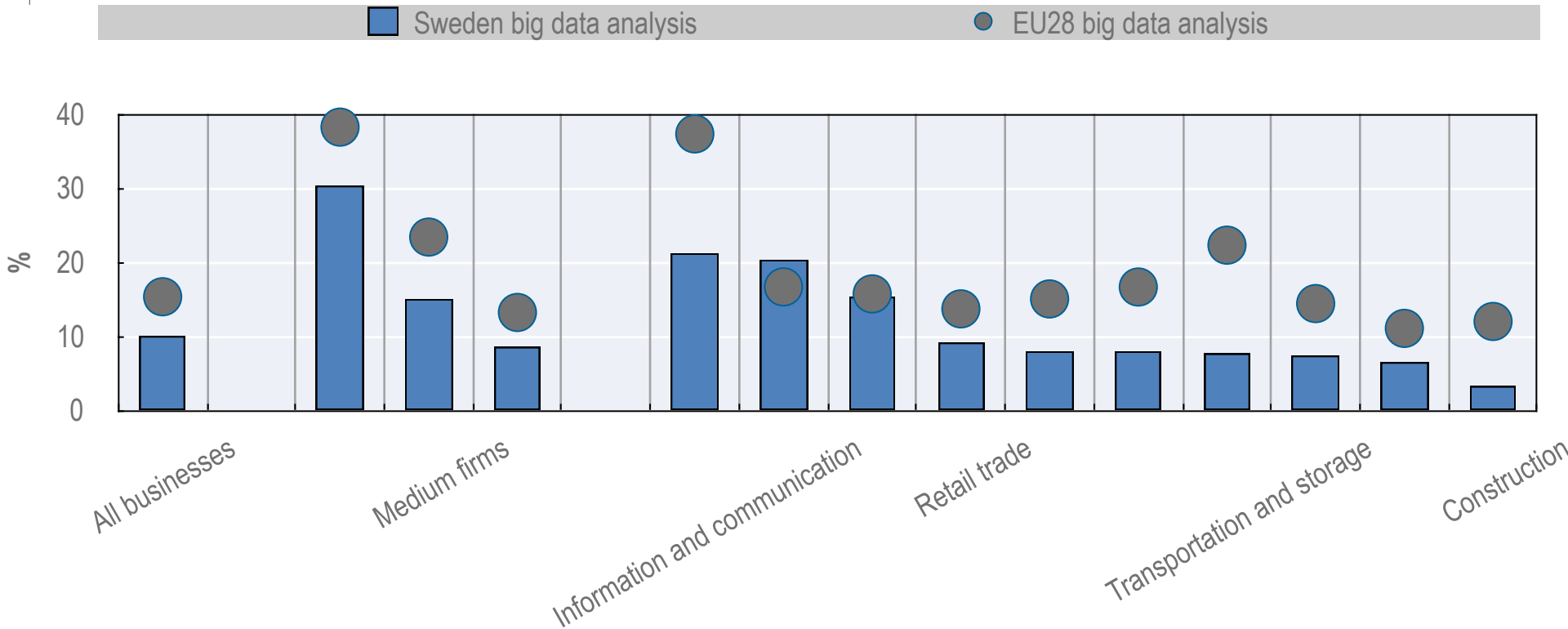
- Enhance coordination among national and regional/local plans for broadband (fibre) deployment – stronger role for the Broadband Forum (BF)
- Promote deployment of high-speed broadband networks in sparsely populated areas – closer coordination among PTS, BF and the Digitalisation Council
- Foster robust 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



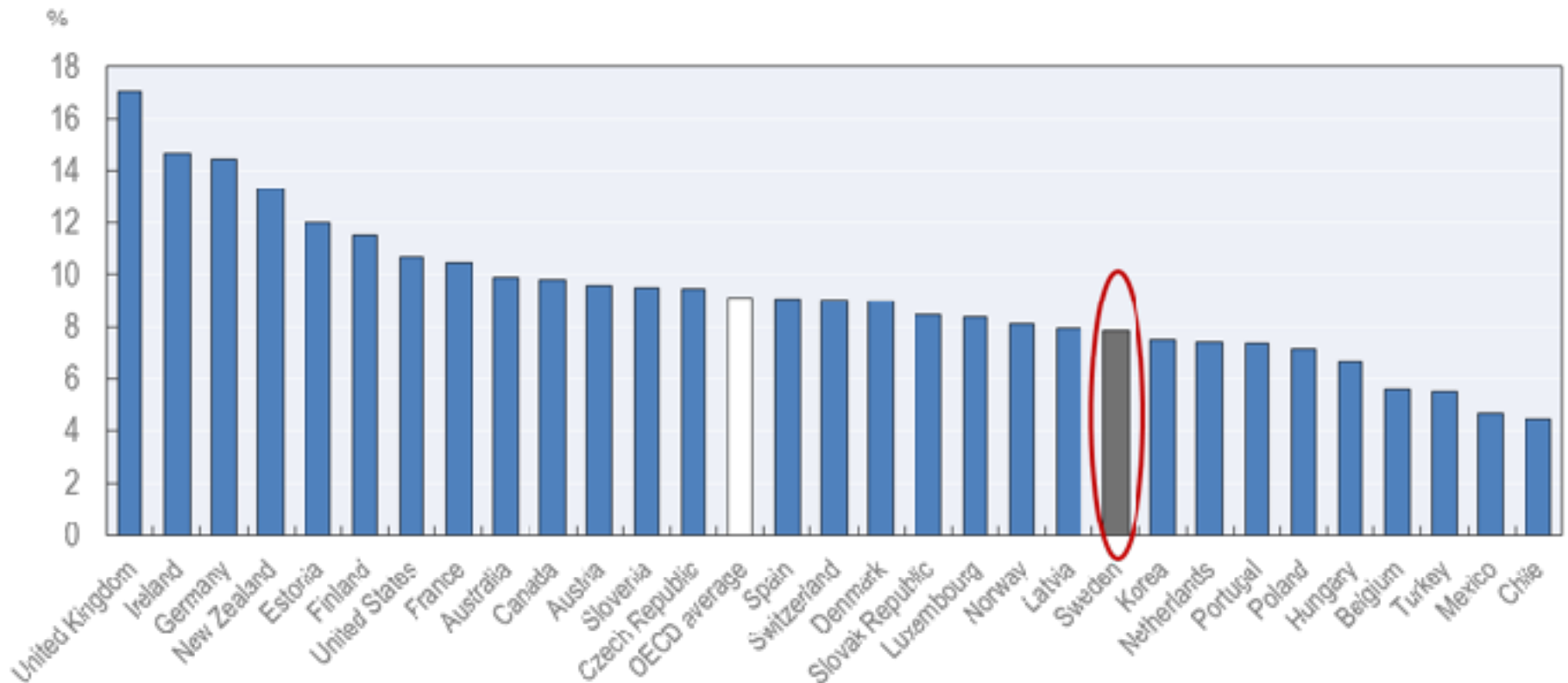




## Chapter 3. Fostering the digital transformations among individuals, firms and in the government

### Tertiary graduates in ICT and data specialist studies, 2015

% of all tertiary graduates

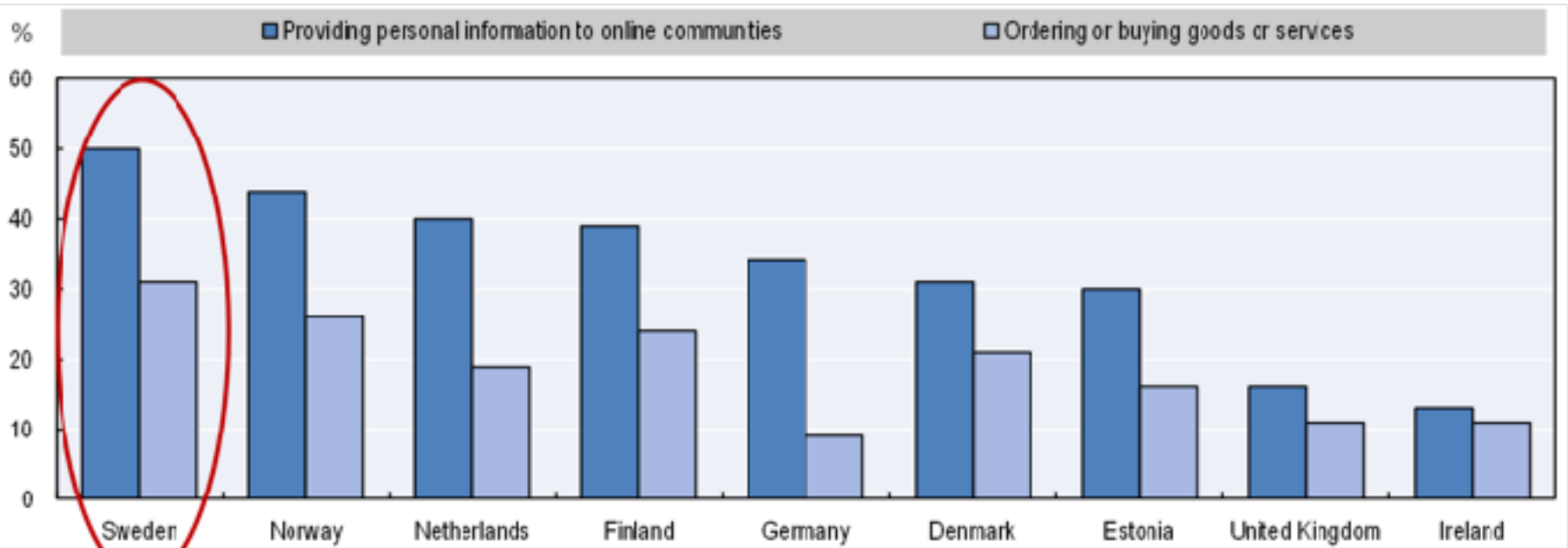




# Chapter 4. Digital security policy

## 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

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## **Policy recommendations to strengthen digital security**

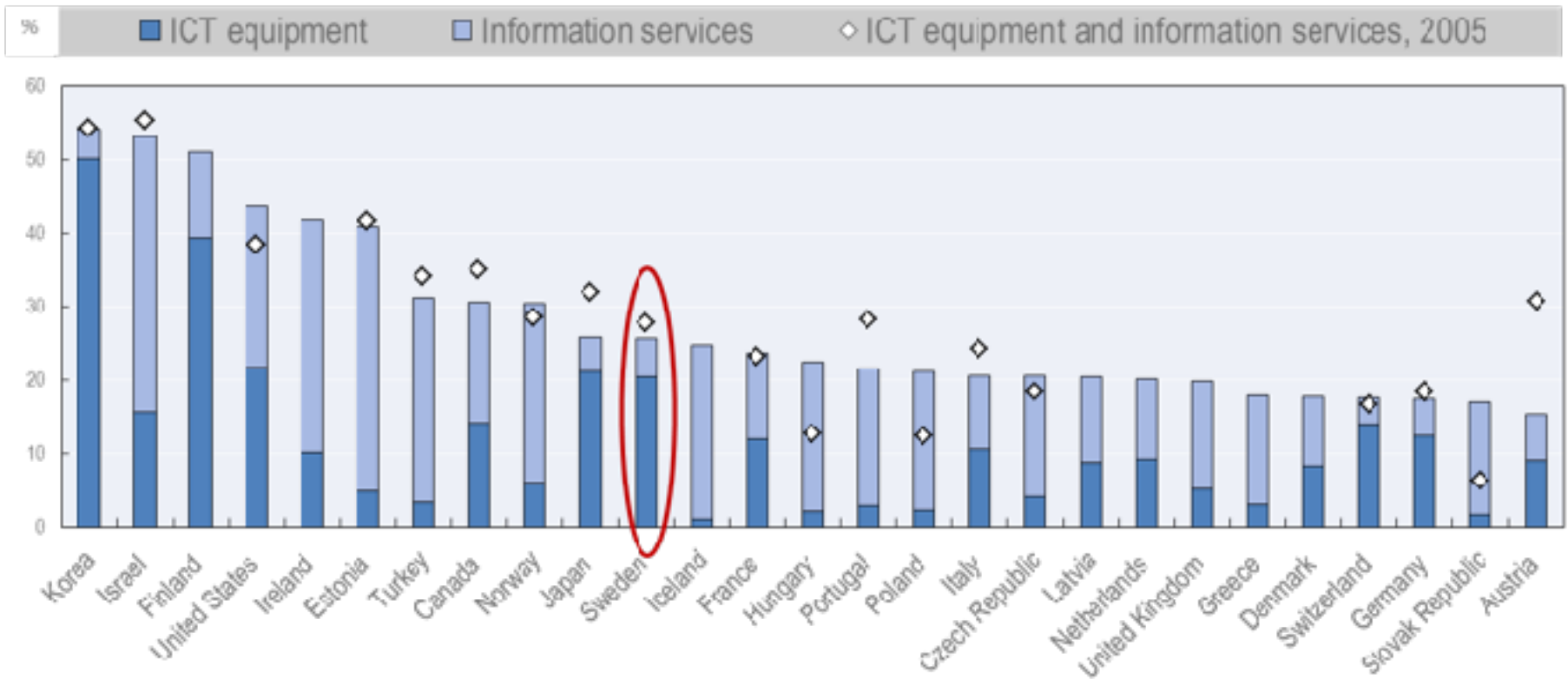
- Promote a clearer vision of digital security risk management as:
  - an economic and social responsibility
  - of leaders and decision-makers
  - in public and private organisations
- Provide policy leadership on the economic aspects of digital security, by strengthening Ministerial co-ordination
- 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

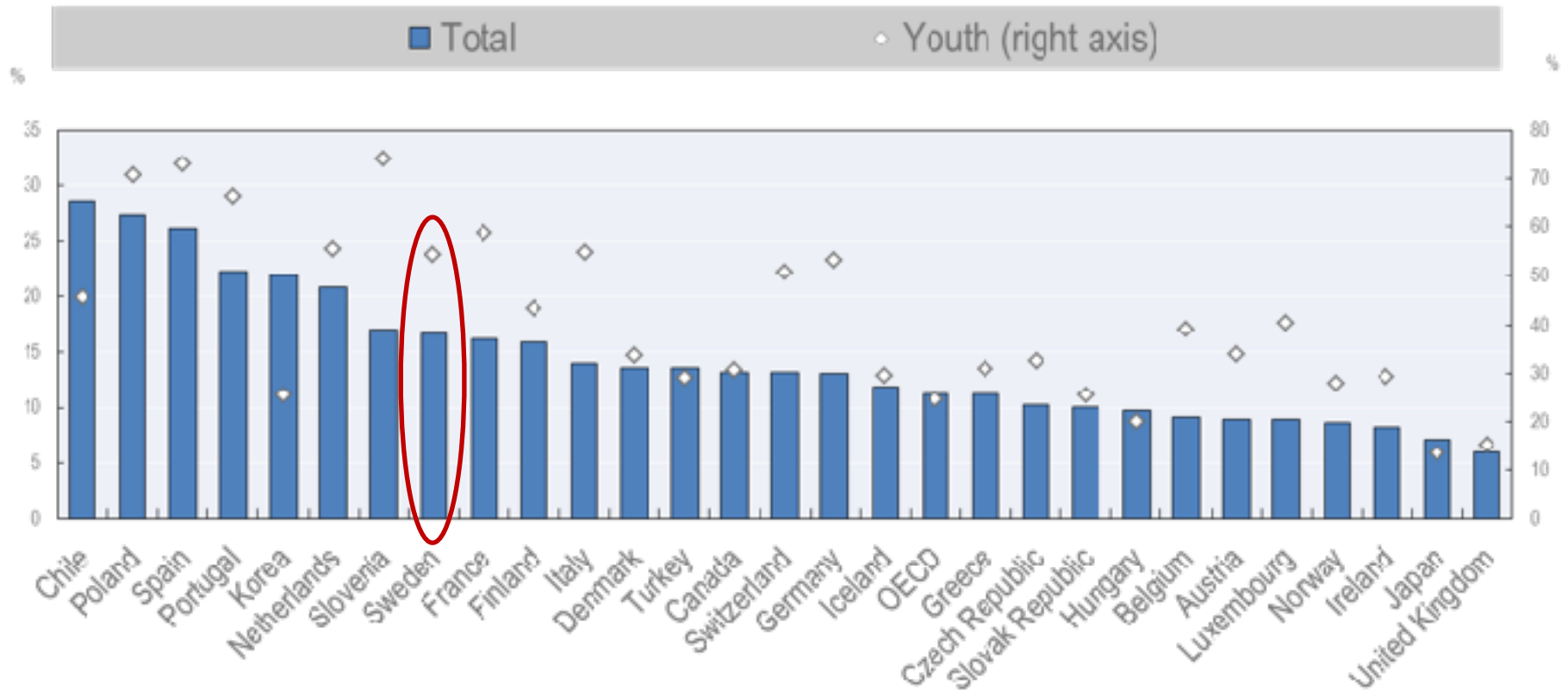
As a percentage of total IP5 patent families owned by economies





# Chapter 5. Seizing the opportunities from digitalisation

## Incidence of temporary workers in dependent employment 2016





# A new Digital Strategy for Sweden

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- 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

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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