

A REPORT FROM TECHSVERIGE

A techagenda for the EU



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1. An important choice for tech in the EU

On 9 June, Sweden will hold elections for the European Parliament during which 21 Swedish MEPs will be elected. The Parliament will approve the European Commission for the term of office extending until 2029. Europe's digitalisation, and its impact on competitiveness and the green transition, will be pivotal during this mandate.

TechSverige would like to contribute to a factual and evidence-based debate before the election. With this report we hope to help voters, parties and candidates in the election get a better understanding of the significance of digitisation and the tech industry for the prosperity of both the EU and Sweden.

We hope that the future Swedish MEPs will be strong advocates for a competitive EU that can flourish in the digital and green transition. We also hope that they will assume leading roles in key committees and legislative initiatives for digitisation and competitiveness.

Fact box: European Parliament

The European Parliament, the only EU institution directly elected by the citizens of the EU, holds general elections between April and July every five years, usually in May or June. The next elections for the European Parliament are scheduled for 6–9 June 2024. During this period, 720 members will be elected to serve from 2024 to 2029. Of these, 21 are Swedish members who will be elected by Swedish voters on 9 June 2024. Germany has the largest representation with 96 members; while the smallest Member States have six members each.

Together with the Council of Ministers, which comprises representatives from the governments of the Member States, the European Parliament plays a crucial role in deciding on EU laws and budget. Following the elections, the Parliament also votes to approve the proposed President and Commissioners of the European Commission. The European Commission is the only EU institution with the power to create new laws. Thus, the European elections are an important opportunity for all Swedes to influence the future direction of the EU, as the European Parliament to some extent shapes the framework within which the Commission operates.

Digitalisation continues to transform society

Digitalisation creates new conditions and reshapes the business landscape, altering how we live and work. This is crucial for economic growth, productivity and innovation in business. Digitalisation also serves as a fundamental tool for creating sustainable welfare in the public sector.

The European Commission highlights in a White Paper that the future competitiveness of Europe in all sectors depends on sophisticated digital network infrastructure and services. These elements are crucial as they underpin global GDP growth of EUR 1–2 trillion and are instrumental in driving the digital and green transformation of our society and economy.¹

The tech industry in the EU is important in itself but also plays a significant role for the EU economy. Swedish tech companies, along with other companies operating within the EU, enhance other industries when leveraging the benefits of digitalisation. This is of great importance for innovation and competitiveness in both Sweden and Europe. The EU single market is equipped with the appropriate conditions for digitalisation.

EU lagging behind

The pace of digitalisation is rapidly advancing globally and there is a genuine concern that the EU could fall behind. The utilisation of high-capacity connections, which is the basis for the advanced services of the future, is lower in the EU compared to countries like the United States, South Korea and Japan.² The pace of digitalisation is rapidly advancing globally. Furthermore, only eight percent of small and medium-sized enterprises (SMEs) engage in cross-border trade within Europe. This figure is on the same level as five years ago.³ In a recent survey conducted among the members of the trade association Digital Europe, eight out of ten members report that the

¹ European Commission (2024), p. 3.

² European Commission (2024), p. 6.

³ Digital Europe (2023), p. 4.

business climate and the regulatory burden have deteriorated significantly during the same period.⁴

The EU's share of the global IT market has decreased over the past decade from 22 percent in 2013 to 11 percent in 2022.⁵ Det är bara 11 procent av världens mest lönsamma techbolag som har sitt huvudkontor i EU och 80 procent av europeiska vd:ar är pessimistiska i sin syn på europeisk konkurrenskraft – hela 60 procent säger att de överväger att flytta verksamhet eller investeringar till USA de närmaste två åren.⁶

Securing capital in the EU is more challenging compared to the US, which benefits from a more well-established venture capital culture. For example, after nine years, European startups have received 54 percent less in private investments compared to American counterparts. As much as 61 percent of the global funding for artificial intelligence (AI) is allocated to US companies, while European firms receive only 6 percent of this funding.⁷

Sweden has good conditions

Sweden and companies operating in Sweden are well-positioned to spearhead the digital transformation and broadly benefit from digitalisation in the society. This is supported by the country's relatively well-developed digital infrastructure and a population with high digital maturity, not to mention that we are quick to adopt new technologies and use digital tools.

In terms of integrating digital technology into business operations, Sweden ranks third in the EU. Sweden boasts the highest share of SMEs with basic digital intensity (86 percent) or higher and of companies using cloud services (69 percent) within the EU. Furthermore, in Sweden, 19 percent of the companies engage in big data analysis and 10 percent use AI technology, figures that are above the EU average. At the same time, Sweden is one of the leaders in the EU for small and medium-sized companies with online sales (33 percent) and total sales from e-commerce (19 percent). However, only 11 percent of online sales take place across national borders, slightly above the low EU average.⁸

For Sweden to excel and for the EU to effectively compete on the global stage, EU rules must be proportionate, technology-neutral and risk-based. Legislation should facilitate the use of self-certification, codes of conduct and market-driven standards to efficiently achieve intended objectives. This approach will provide the business community with optimal conditions and will enable companies operating within the EU and Sweden to effectively compete with emerging technologies. It will also be easier to manage risks using the latest technology available on the market. The public sector needs to be steered more decisively towards embracing the possibilities digitalisation has to offer and should be allowed to do so to a greater extent by using them to create a more sustainable and efficient society for all citizens.

Sweden's digitalisation in a broader perspective

Sweden needs to reverse the current trend and reclaim its position as leader in digitalisation. Achieving this requires, among other things, political commitment and leadership as well as a proactive and clear digitalisation and tech policy. This applies in our cooperation with the EU as well as nationally.

The Swedish tech industry accounts for 11 percent of Sweden's exports, a share that amounted to nearly SEK 350 billion in 2022, making tech one of Sweden's most significant export segments. The tech industry also creates new jobs. Since 2020, it has generated 33,000 new jobs and in the second quarter of 2023, the industry employed more than 265,000 people.

⁴ Digital Europe (2023), p. 4.

⁵ European Commission (2023), p. 12.

⁶ ERT (2024).

⁷ Digital Europe (2024), p. 10.

⁸ European Commission (2022).

Despite positive developments in Sweden, there are challenges as global tech competition intensifies. TechSverige's Swedish Tech Industry Report 2023 shows that tech growth in countries like Denmark, Finland, the Netherlands and Austria was twice as fast between 2015 and 2020. The robust digitisation reforms implemented by other countries and the lack of reforms in Sweden have caused us to lose our previous head start. This is particularly evident in public sector digitalisation, where Sweden is also falling behind other nations. Moreover, compared to the United States and countries in Asia, Europe is losing ground in the global tech race.⁹

The goal of the Swedish digitization policy is to position Sweden as the best in the world at utilising digitisation opportunities. For several years, the European Commission has been measuring the digital progress of Member States through the Digital Economy and Society Index (DESI) survey. Historically, Sweden has been among the forerunners within the EU countries, although it no longer secures a top-three position in Europe.

Indexes like DESI and rankings have their limitations and merits and do not always capture the big picture of digitalization. DESI has been going on for a number of years and some trends have now become clear. Sweden has dropped in ranking and is now in fourth place. This does not bode well. In 2018, we were at the top of the list and then fell to second place (in 2019 and 2020) and then to third place (in 2021). Considering the competition from North America and Asia, this position is far from the best in the world. In the Swedish speciality branch "connectivity", which evaluates, among other things, the use of and access to broadband and mobile networks, we place ninth for the first time.

The situation might be even more dire in specific areas. According to DESI, Sweden ranks ninth in digital public services. In OECD's Digital Government Index 2023, which assesses the digitisation of public administrations across 38 countries, Sweden is positioned 27th. At the top are Korea, Denmark and the UK. Our Nordic neighbours all perform above average.

This stands in strong contrast to the goal of the Swedish digitization policy – to position Sweden as the global leader in utilising digitisation opportunities. Even in the area where different governments have historically had significant potential for influence, namely the state administration, the results are far from impressive.

⁹ TechSverige (2023) p. 30.

2. EU's tech policy is key

For enhanced competition within the EU, it is important to push for increased digitalisation and technology development. Sweden and the EU need a tech policy that strengthens and does not prevent new companies from being born in Sweden, growing up in Europe and competing globally.

The business community has clearly articulated that the EU needs to have an ambitious and sustainable competitiveness policy. In important domains and not least in AI and broader digitalisation, companies from other parts of the world dominate. One example is that close to 60 percent of all external financing (capital raised outside the company such as venture capital) for 5G investments goes to China, while 27 percent is directed to the United States, leaving only 11 percent to Europe. In the AI field, the US has a share of 40 percent, Asia including China has 32 percent and Europe 12 percent.¹⁰

Some of the European problems are self-inflicted with increased regulation and state aid preventing the development of real competitiveness. The competitiveness agenda presented by the Commission during the Swedish Presidency in 2023 must therefore be realised.

In the area of digitalisation, the Commission's proposals and EU legislation have largely focused on the consumer perspective and the protection of citizens (such as privacy issues). These issues are also important for the business sector because trust forms the foundation of all customer relationships and a well-functioning market. However, achieving this trust requires striking the right balance. Furthermore, the regulations have been intense. The speed, volume and level of detail of EU regulations in recent years are unprecedented. During the period 2019–2024, 116 EU legal acts relating to digitalisation were adopted.¹¹ In other words, almost two acts per month during the period.

Companies must be able not to understand but also comply with the laws in practice. This task has become increasingly challenging, especially in an area such as digitalisation where development is fast-paced. Therefore, the legislation needs to be well-prepared and well-designed. Here, too, the European Parliament has a key role to play in the legislative process.

Before initiating legislative work, careful analysis of the problem to be addressed and the potential consequences of new laws for companies and society is essential. The new rules must be technology-neutral and must not create unnecessary bureaucracy or administrative burden for companies. They should not entail unjustifiable costs for companies or make it more difficult to sell goods and services online. Moreover, rules should be formulated to ensure consistent application and interpretation across all EU Member States. One example is the complex data protection regulation GDPR which has proven difficult to implement, especially for SMEs.

Well-balanced and well-designed rules also contribute to strengthening both the internal market and European competitiveness. Legislation within the EU should not be allowed to compromise our competitiveness. Hence, the regulatory burden on tech companies needs to be eased and aligned with the global competition. Regulatory compliance needs to be simplified, especially for SMEs, and where feasible it should be fully automated.

The Commission has recently released a White Paper titled "How to master Europe's digital infrastructure needs?" according to which the EU is at a crossroad, facing significant technical and regulatory transformations in the near future.¹² Here, Sweden needs to elevate its presence in the debate in Brussels in order to secure regulations that enable us, as an export-dependent nation, to thrive as a leading tech hub in competition with the United States and the countries in Asia.

Taking on a leading role requires not only clear political will to elevate ambitions, but also sharp proposals and national investments. This entails setting high aspirations for Sweden's

¹⁰ McKinsey Global Institute (2022), p. 59.

¹¹ Cited in Meyers (2024), p. 4.

¹² See European Commission (2024).

engagement within EU cooperation, both in the Council of Ministers, where our government is represented, and in the European Parliament.

A Commission on digital competitiveness

Sweden holds strong interests in a well-designed EU digitalisation policy. This is essential partly in order to continue to strengthen Swedish companies' digitisation, and partly in order to further digitise the public sector in Sweden. Therefore, the proposals put forth by the European Commission, and their design, carry immense importance. During the Swedish Presidency, the matter of competitiveness was once again brought to the forefront of the EU agenda. That effort must now be substantiated with content.

The EU needs a Single Market Commissioner in the upcoming Commission, tasked with a clear mandate to develop a Single Market for services and digital solutions. One important mission of the new Commission is to simplify the existing EU tech regulatory framework and ensure its effective implementation and adherence across Member States before the introduction of new regulatory frameworks. This initiative can lead to enhanced innovation and growth. Efforts must persist to open up a data-driven economy presenting new business opportunities. Europe has the chance to take the lead in the development of data-driven innovation that takes privacy issues into account.¹³

There is room to simplify and rationalise existing regulations. At present, there are gaps, overlaps and inconsistencies in the regulations pertaining to digitisation that need to be addressed. The regulations also need to be future-proofed and based on principles and overarching goals, rather than solely addressing immediate issues. Self-regulation plays an important part as well. It is desirable for the Commission to continue its efforts to reduce the possibilities for Member States to introduce additions or deviations from EU-wide rules.¹⁴

It is also important that the regulations governing digitalisation promote open markets and make it possible for companies operating in Europe to access the best technologies and global markets.

A European Parliament for digital competitiveness

The European Parliament and its members have a great responsibility in fostering conditions that enable companies operating within the EU to achieve digital competitiveness. The Parliament must endorse the new European Commission and its Commissioners, in addition to participating in decisions regarding the budget and EU legislation. The Parliament will be involved in shaping the framework for digital competitiveness and exerting influence on individual proposals for EU legislation put forward by the European Commission.

Swedish MEPs should promote competitive utilisation of technology, enhanced digitalisation in society and digital capacity at the forefront of development – in line with what has been described above about the Commission's priorities. The Parliament – and the MEPs – also bear the responsibility to consider and describe the consequences of the positions and amendments they introduce into the decision-making process.

Swedish MEPs need to take responsibility in the committees that affect digitalisation and competitiveness, but also increase efforts to exert influence in their political groups (parties) in Parliament. This would also affect the digitisation and development of Swedish companies.

¹³ Meyers (2024), p. 3.

¹⁴ Compare Meyers (2024).

3. A tech agenda for the EU

Given that Europe is lagging behind in relation to North America and Asia, digitalisation within the EU must be compared to these globally leading regions. To make a competitive digital Europe possible, it is paramount to implement regulations that keep pace with advancements together with effective stimulus measures.

A competitive digital EU

During the Commission's next five-year mandate, efforts should focus on the implementation and the conditions for compliance with the legislation. Swedish MEPs must amplify their influence in discussions and negotiations on digitalization policies in Brussels. They should actively promote legislation based on the "Think Small First" principle to facilitate compliance. Automation, such as digitised decisions and permits, should be pursued wherever feasible.

Digitalisation grows stronger as usage increases. More Swedish and European SMEs need to undergo digitalisation. Of course, it benefits the tech industry, but also improves the competitiveness of the entire business community.

A Europe at the forefront of green and digital transformation

The green and the digital transformation, the so-called twin transition, must take place in parallel and be accelerated. Digital technology facilitates and is a prerequisite for the entire society's climate transition through, among other things, energy efficiency and circular economy. Furthermore, in the context of the green transition, the EU has a significant competitive edge.

Close cooperation between Member States, increased interoperability and a well-developed and reliable digital infrastructure are needed for the EU to achieve its climate and environmental objectives and realise its full global competitive potential. Swedish MEPs are urged to take action to ensure that the digital infrastructure serves as basis for this transition and is accessible to a broad spectrum of users.

Sweden as a digital pioneer

If the EU is to join and take the lead in digital development, the Member States' good examples and knowledge need to be used in EU cooperation. Sweden has unique opportunities to contribute to development through, among other things, strong companies, educated population and renewable energy. Within the scope of their responsibilities, Swedish MEPs are encouraged to utilize this opportunity by fostering increased dialogue with the business community.

4. A tech agenda for the EU – proposals

TechSverige's tech agenda for the EU contains proposals in nine domains aimed at developing the EU's efforts on digitalisation and on which the Swedish MEPs need to focus.

1. Let the new rules take effect

During the last mandate, the digitalisation regulation has significantly intensified. After an intensive legislative period, companies operating within the EU must be afforded a respite from new requirements and should be allowed to capitalise on the benefits offered by the regulations and adjust to the requirements. Some of the legislation has been deemed desirable and necessary, but it has often been too fast and the consequences have not been adequately analysed.

The introduction and conditions for compliance with the legislation must now be a priority for the Commission. The "Think Small First" principle facilitating compliance could be implemented through automated, digitised processes and decisions for, for example, permits.

- The EU needs a Single Market Commissioner in the next Commission with a clear mandate to develop a single market for services and digital solutions, including by focusing on their introduction and conditions for compliance.
- It should be possible and straightforward for companies seeking growth to use regulatory sandboxes. This legal framework allows companies to offer products or services in a modified regulatory environment. Then companies can test a product or service before it is offered to a wider market.

2. Accelerate the EU's green and digital transformation

In the EU Green Deal, similar to Sweden's industrial strategy, digitalisation and digital solutions are recognised as keys to the transition. Digital solutions can reduce emissions in society in several ways. Significant emissions reductions can be achieved through further digitisation of large systems (such as energy and transport), more efficient processes and new working methods.

5G technology, alongside the Internet of Things (IoT) and A,I form the basis for many of the solutions required to achieve the climate objectives and foster a society that is more resource-efficient with reduced climate impact. These technologies are estimated to contribute to reducing global emissions by up to 15 percent, indirectly contributing to a further 35-percent reduction by influencing consumer and corporate decisions as well as through system transformations.¹⁵

Digital solutions serve as tools capable of reducing emissions across various sectors, including food production, manufacturing, the public sector and its energy consumption, construction, real estate and transportation. Already existing digital solutions can be scaled up both nationally and globally and spread to more industries to maximise their benefit.

Interoperability and reliable communication infrastructure with high capacity and close cooperation between Member States will be crucial for the digital and green transformation, the so-called twin transition.

We want to see more EU-wide initiatives and action between the digital and green transitions.

- The EU's connection between the digital transition and the climate transition may not necessarily require further legislation, but rather a new injection of energy and visibility regarding this strong connection in order for the use of digitalisation as a tool to rapidly increase.

¹⁵ Exponential Roadmap 2030.

- At EU level, there must be a focus on how the power of digitalisation can be used in environmental and climate initiatives in discussions in much earlier stages of all processes, including new proposals.
- To maximise the benefits of digitisation, a significant amount of renewable energy is required in relation to what is produced in the EU today, and the implementation of Fit for 55 is therefore of great importance.

3. Simplify for data-driven innovation and growth

A more coherent policy is needed regarding how data can be harnessed and utilised within the EU. Today, important rules for data usage are scattered in different legislations and the implementation in the Member States varies. This fragmentation risks exacerbating with the new rules developed during the current mandate. The next commission should therefore focus on implementing the current data strategy, refraining from adding further regulation.

- The EU should remain open to ideas aimed at simplifying and harmonising existing legislation on data usage.
- EU cooperation should support market-led standardisation efforts to address data management, data access and interoperability issues.
- Voluntary data exchange should be encouraged within frameworks based on specific use cases that meet actual industrial needs.
- Both GDPR and sector-specific rules make it difficult and costly to comply with business-to-business data sharing rules. Companies are often required to interact with 12 regulators in a single Member State. It is crucial to establish a clear framework where companies are subject to one principal authority according to the Data Act.
- The data file shall be paramount when it comes to the right of European statistical authorities to request data from companies.
- Reduce the reporting burden by introducing the once-only reporting principle for reporting requirements in EU legislation such as GDPR, the Data Act, the AI Act, the Cyber Resilience Act (CRA) and other regulatory frameworks.

4. Reclaim the position as a leading network nation

To regain its position as a leading network nation, Sweden needs an EU policy that supports this ambition. Sweden has historically been a strong and driving force in European digitalisation efforts. Modern and secure communication and broadband networks are the foundation for a sustainable digital transformation of society and business.

In TechSverige's report Billion Reasons for 5G, the potential for a rapid introduction of 5G has been estimated to increase GDP by SEK 126 billion annually through enhanced efficiency and innovation.

TechSverige believes that Sweden should and can assume a more prominent role in EU initiatives. Within the framework of the government's work on a new digitisation strategy, we therefore propose that the government include a Swedish EU policy for 5G, 6G and connectivity, aiming to position the EU as a leading network union. Stable conditions are also needed for other digital infrastructure such as data centres. We also wish to see future Swedish MEPs in Brussels engaging in network-related issues by:

- Promoting a European policy that emphasises the importance of networks for EU business and competitiveness and encourages innovation for the digital transformation.
- Creating regulations that foster a good investment climate where it is easy and cost-effective to establish networks and other digital infrastructure.
- Promoting a coherent single market for mobile communications, including harmonised and efficient spectrum allocation
- Stimulating the spread of good examples of 5G applications between EU Member States.

5. Coordinate and simplify efforts for high information and cybersecurity

Response from the EU to information and cybersecurity problems has been necessary but it has also led to several organisations having assignments and responsibilities in the area, as well as increasingly complex regulation in the EU. The risk of over-regulation is also real, coupled with the lack of expertise in the field. As a result, the EU can become less secure as information and cybersecurity risks increase. In practice, the regulations may become overlapping and the reporting requirements unnecessarily complicated. In practice, both CRA and NIS2 may require reporting, which may also be mandatory under GDPR. There are also risks of conflict with sectoral legislation.

- Coordinate the EU's efforts on information and cybersecurity by merging organisations such as ENISA, the European Cybersecurity Competence Centre (ECCC), the EU-level CSIRTs network and other organisations responsible for information and cybersecurity.
- Cloud services are regulated by both CRA and NIS2. Clarify how NIS2 and CRA should interact when it comes to remote data processing.
- Reduce the reporting burden by implementing the once-only reporting principle for reporting requirements to one designated authority.

6. Strengthened skills provision for EU competitiveness

The digital transformation, accompanied by rapid technological advancements, creates a demand for people with the right skills to fill the new job opportunities emerging. Member States need to cooperate with the business sector so that there are training courses that meet the needs of the labour market and are better tailored to the jobs that exist and are created in digitalisation. This also entails that Member States must be able to attract more people with the requisite skills from both the EU and the rest of the world. It also places great demands on well-functioning Swedish rules for labour immigration. For Sweden, additional reforms are needed to improve job matching in the labour market.

Swedish MEPs should advocate the free movement of persons.

- It should be easier for both EU citizens and third-country nationals to work and move within the EU. This may include creating better conditions and mutual recognition of qualifications, as well as facilitating access to each other's labour markets.

7. Research and innovation for advanced digitalisation

In a globalised economy characterised by rapid technological development, the EU needs to invest in innovation, research and development to address future challenges effectively. Therefore, investment in research and innovation must increase. This is particularly true in advanced areas such as AI, quantum computers, 6G, information and cybersecurity. This concerns both EU research funding and better conditions for the R&D initiatives of the business sector.

- The administrative burden surrounding applications for research funding from the EU should be reduced. Time and money should go towards research activities, not towards paperwork.
- Research and innovation initiatives should promote a broad dissemination of knowledge and learning between industries and domains. Today, there are too many examples where large research projects create bottlenecks, thereby passively limiting the benefit of innovations.
- There is a need for increased investment in research and development programmes at EU level covering the entire chain from basic research to applications.

8. Paving the way for AI and new technologies

To ensure that the EU remains at the forefront of AI and cutting-edge digital technology, several fundamental improvements are necessary. Accelerating the use of these technologies is crucial

for meeting both climate challenges and the EU's welfare challenge, while also enhancing its competitiveness.

- Reduce the regulatory burden. Although regulations such as the AI Act and the Data Act have been established, a clear policy for interpreting the legislation is now needed, focusing on compliance, but without limiting innovation and global competitiveness.
- Improve the conditions for companies to develop and utilise AI, with a focus on increasing readiness to adapt to the AI Act. In addition, the AI agency needs to have real opportunities to make things easier for companies.
- Ensure a good AI and digital technology competence pool at the forefront as well across – a good supply of skills paves the way for widespread use and the introduction of these technologies provides economies of scale and leverage around benefits in the public sector and the competitiveness of the business sector.
- Advocate for a global standard for the ethical use of AI.
- Promote the EU's active and constructive role in the international efforts on AI and new technologies, for example in the work on global standards.

9. A competitive labour market

EU social policy should contribute to strengthening the competitiveness of companies operating in the EU, creating jobs and ensuring the supply of skills. The role of the social partners, both at EU and national level, should continue to be reinforced in order to ensure that collective agreements are recognised as a competitive and flexible regulatory instrument for working conditions.

- Reduce EU labour market regulations to alleviate the regulatory burden on employers.
- Design directives in the field of social policy with flexibility to adapt to various industries and national labour market systems.
- In particular, assess the impact on the competitiveness of companies in the impact assessments of the Commission's proposed legislation in the field of social policy.
- Uphold the EU's subsidiarity principle and maintain the distribution of the respective competences of the EU and the Member States in this area.
- Safeguard the Swedish collective agreement model in the long term by highlighting the benefits of collective agreements as a regulatory instrument as an alternative to legislation.

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TechSverige is an industry and employer organisation for all companies in the tech sector, with the mission of working together with our members to create the best possible conditions for a competitive tech industry in Sweden. We have more than 1,400 member companies – with close to 100,000 employees in total in Sweden – ranging from small startups with just a few employees, to large, multinational companies with thousands of employees around the globe.

You are welcome visit us at techsverige.se

