



Department for
International Trade



Europe Trade Month

November 2021





TechExports Europe

Hear from the UK's Department for
International Trade market specialists to find
the greatest opportunities for your business



TechExports Europe – Sector webinars



The tech sector offers high quality opportunities for British companies across Europe and there is an appetite for British technology and innovation.

From AI to Fintech, robotics to emerging technologies and more, the UK is a benchmark for tech innovation and solutions. These sessions will allow you to explore the trends, challenges and how to make the most of the opportunities on offer.

Click on the sector from the list on the right to find an overview of the different European markets that will be presented in the sessions.

16 November 2021 (GMT)

<u>AgriTech & FoodTech</u>	9:00 – 9:30
<u>CleanTech & Future Mobility</u>	9:30 – 10:00
<u>Cybersecurity</u>	10:00 – 11:00
<u>Defense & Security</u>	11:00 – 11:30
<u>EdTech</u>	11:30 – 12:00
<u>Fintech & InsurTech</u>	12:30 – 13:30
<u>Healthtech, Medtech & Biotech</u>	13:30 – 14:30
<u>Industry 4.0</u>	14:30 – 15:00
<u>Infrastructure</u>	15:00 – 15:30
<u>Smart Cities</u>	15:30 – 16:30
<u>Telecoms</u>	16:30 – 17:00



COUNTRIES PRESENTING:

BELGIUM

Market trends in Belgium demonstrate a clear demand for food and drink products that are healthy, local, socially responsible and environmentally friendly. Belgium is home to several R&D centres and innovation clusters which focus on **innovation in the agrifood industry** to tackle topical challenges such as water issues. **Sustainability**, and **efficiency improvement through innovation** are for example two key aspects of the industry.

IRELAND

While grass-based milk and meat production are the most visible outputs of the diverse Irish agriculture industry, many of the end products of the crop and horticultural sectors are world renowned brands in their own right. The focus in Ireland on quality has always been supported by high-quality equipment and has created a world-class agriculture industry.

Ireland is the home to some of the biggest and most innovative global players in technology and many opportunities exist for UK agritech companies:

- **Increased productivity** through greater efficiency in farming/supply chain operations
- Increasing the **usefulness of data** by way of capture or interpretation
- Helping the industry respond to sustainability pressures
- Farm animal welfare or disease control
- Simple and effective **automation**

(Cont. page 5)



POLAND

Agriculture is currently the **fourth largest sector of the economy in Poland**, and its contribution to the country's GDP is much higher than the EU average. Rural areas constitute 93% of Polish territory, and are inhabited by nearly 40% of the population. The agrifood sector is an important component of the country's economic potential as it accounts for almost 8% of the total gross added value. Polish market is open to the emerging AgriTech and FoodTech solutions. Opportunities can be found in: using **drones, robots**, sensors and farm management software for **precision farming**, as well as **next generation farms** and **urban farming**.

As to **FoodTech**, opportunities can be in **innovation** in the products, **distribution, marketing and business modelling** in the food sector.

THE NETHERLANDS

The agrifood sector is one of the 9 declared 'top sectors' in the Netherlands. Due to the climate ambitions of the Dutch government, the main challenge is the transition towards a **more circular and energy efficient system**. The Dutch are keen to export their expertise, but are also open to ideas from abroad. They proactively seek cooperation with organisations in other climate zones to develop methods for how to deal with drought or long periods of heavy rainfall. The industry is focusing on: developing **robust farming systems** (on healthy land with minimal inputs), **preventing food waste** across the whole supply chain, **climate smart sourcing** and **smart technologies** (AI, robotics, digital) that support **circularity and energy efficiency** (low carbon).



COUNTRIES PRESENTING:

GERMANY

Recent top court rulings and a new (greener) government will set tougher rules to bring **carbon emissions down to zero** in Germany. Industry will look out for innovative tech solutions to support with this task.

GREECE

In Greece, there is an ambitious plan by the government to give grants for the **transition to zero-emission vehicles**, so 1 in 3 vehicles will be electric by 2030. The Ministry of Transport has announced tenders for the purchase of 250 electric buses in total during the next months, which will cost €123,75 million. There are opportunities for UK **suppliers of buses** as well as **portable EV chargers** and other **innovative technology** for charging stations networks, smart cars, driving/parking applications etc.

ROMANIA

There is increased interest for electrification development and future mobility technologies in Romania. As Carbon dioxide regulation is likely to continue to tighten, public authorities will invest more in **e-mobility solutions**, **energy efficiency** and **SMART technologies**. There is an estimation of acquisition of hundreds of electric buses/hydrogen or CNG buses by 2025. Government and EU funds will be available to develop green mobility infrastructure, electric stations networks and shared mobility programmes. Public municipalities and local companies are adapting to new trends and demand for know-how and innovative technologies is growing.

(Cont. page 7)



THE NETHERLANDS

Following the publication of the 2019 Climate Agreement, the Netherlands is implementing a series of strategies and projects that aim to transform the Dutch economy to a **carbon-neutral system**. These include looking to export renewable electricity and facilitate the development of a robust market for low-carbon hydrogen, supporting carbon capture and storage to lower industrial emissions and help the country achieve its national climate change mitigation targets. Considering this, the UK plc is well positioned to engage with Dutch counterparts on **project development, installation, equipment, O&M and specialised maritime services**.



COUNTRIES PRESENTING:

BELGIUM

Following the publication of its [Cyber Strategy 2.0](#), the Belgian government aims to become 'one of the least vulnerable countries in Europe' regarding cyber criminality. By identifying cybersecurity as a **key element to its digital transition** and continuing to invest in it, Belgium hopes to protect its organisations and enhance collaboration between the different sectors (public, private and academic). ['IT Security Strategy'](#), ['Data Governance'](#) or ['User Awareness'](#) are some of the main areas of focus for local organisations and digital leaders and represent therefore opportunities for UK companies.

GERMANY

Germany has the second biggest security market in Europe after the UK and **demand** in Germany **continues to grow** as changing regulatory environment, increased awareness and digital business models continues to gain momentum. **Ransomware** is a key challenge.

LITHUANIA

With a quick emergence of smart cities, fintech and other tech sectors in Lithuania, the market is opening up for more and more **advanced technologies to manage cyber risks**. UK is perceived as an ally for Lithuanian across a range of areas and thus cyber tech might potentially become another area of close co-operation.

(Cont. page 9)



POLAND

Cyber security is high on the Polish agenda with the **new Cybersecurity Strategy** for Poland for 2019-2024 approved by the Polish government. Opportunities include cyber security solutions for **law enforcement** and **public administration**, cyber security solutions for **military** (includes £40m from Cyber.Mil operational programme), systems related to **data/network protection and data processing**, solutions for collection, storage, analysing and distribution of information, IT security solutions for critical infrastructure sectors and cyber security training.

SWEDEN

The Swedish government is planning to heavily invest into cyber security - £5m have been allocated for 2021 alone, to strengthen the establishment of a **Swedish National Cyber Security Centre** (NCSC). Opportunities for innovative UK companies are especially within **CNI**. Sweden is tackling threats against **payment systems** and the **financial sector** in general. As Sweden is moving towards a gradual phase-out of cash society and ranks among the top digitalised countries in the EU, its financial systems is relying heavily on digital payment systems. And during the pandemic, we have seen an increase of cyber-attacks of just these systems.



COUNTRIES PRESENTING:

PORTUGAL

Despite budgetary constraints in Portugal, police and security forces have been investing in **innovative surveillance**, tracking and tactical **operations solutions**, such as video and audio surveillance, electronic surveillance and tracking, digital forensics, Wi-Fi interception and unmanned aerial vehicles. The use of signal inhibitors of mobile devices in prisons is also being considered by prison services.

ROMANIA

Romania is a member of NATO and the EU. On 30 June 2020, a new National Defence Strategy was adopted, continuing commitment to membership of the NATO 2% club (percentage to be maintained until 2027) and the modernisation of Romanian armed forces. 30% of this budget is allocated for modern military equipment and training. The increased budget for acquisitions offers a clear opportunity for the British **defence equipment and service providers**.

SLOVAKIA

Long-term plan of defence development projects investments equals 30 billion EUR until 2030 in Slovakia (TOP projects incl. modernization of heavy brigade, air defence and other); cyber security opportunities - **monitoring of suspicious web activities** (i.e. darkweb, malware, intrusion from foreign forces); **innovation** within the military forces.



COUNTRIES PRESENTING:

AUSTRIA

Covid showed that two thirds of teachers and students felt ‘overwhelmed’ by home schooling and 16% of 10-19 year olds did not have their own computer. June 2020 saw the Ministry for Education joined-up with the Ministry for Digitalisation to publish an **eight point plan for digital reform of education**. The target is to achieve **fully functioning ‘digital schools’** by 2024, with €250m invested. This strategy will implement a single national online portal for communicating between parent, teachers and students – giving access to learning tools, adoption of a single Learning Management System per school, Digital Teacher Training, “Seal of Approval” for apps – as well as upgrades to hardware and infrastructure.

POLAND

COVID-19 pandemic accelerated interest in and demand for EdTech solutions in schools in Poland. As part of the Polish Deal’s programme, in 2021, the Polish government has allocated over PLN 1 billion to invest in modern technologies (edtech), which will support development of the competences of the future, such as effective collaboration, creativity or problem solving and practical skills - STEAM. Beneficiaries of those funds will be in the first place 12,000 primary schools run by local governments in Poland and then non-public schools. This is a joint initiative of the Ministry of Education and Science and GovTech Centre in the Polish PM’s Chancellery and is called Laboratoria Przyszłości (Laboratories of the Future).

The UK has a strong offer in edtech, especially in areas such as **digital special needs, STEM content, AI and robotics and learning platforms** and there should be opportunities for UK companies to access business opportunities in the Polish education sector through participation in public tenders.



SPAIN

Edtech in Spain is a diverse and **rapidly growing industry**, with over 28,000 schools, 80 universities and more than 250 edtech startups in 2020. Even before COVID-19, there was already high growth and adoption in education technology, and the pandemic has accelerated this trend. Spain hosts the **second largest number of British schools outside the UK in the world** (over 120, with approximately 50,000 pupils) and has an impressive state bilingual education programme, with a firm political commitment to expand it. The **market for British education and related products is huge in Spain**, and the UK and Spain are important stakeholders in each other's educational services and provision. As many schools teach the English national curriculum, any products that sell well in the UK are likely to have a market in Spain. These are just some of the factors that make Spain a good place for UK EdTech companies to grow in!

SWEDEN

Sweden invests heavily in education and training, with general **government expenditure on education being among the highest in the EU**. The National Agency for Education is working towards increasing IT competence and e-learning amongst students and teachers. This includes **two national strategies** for teaching and pedagogical approaches as well as educational content. The digital market for education is still scattered and developing – presenting **diverse opportunities** to help shape new partnerships and ways of operating on the market.



COUNTRIES PRESENTING:

AUSTRIA

Austrian banks and insurers are **amongst the biggest operators in CEE markets**. Regional HQs are operating a number of incubators for innovative technologies which are being rolled out across the subsidiaries. Traditionally a conservative market - PSD2 has forced companies to reassess their offerings to clients. Estimated Euro 588 million invested in FinTech in 2020. Fintechs now being viewed more as a **collaborator** than a competitor.

FINLAND

Finland has a young and growing fintech ecosystem and is home to a digitally savvy user base. Financial institutions are on the lookout for new innovative ideas to match customer needs. There is a **need for original solutions, especially in customer experience design**, beyond banking solutions, **digital identity management, AI, machine learning, and open banking**.

FRANCE

FinTech is a **rapidly growing** market in France, especially since Brexit. Other areas expected to grow in the near future include **regtech, insurtech and green finance**. Continuous demand for UK capabilities in fintech and management/consultancy services, due to innovation needs of the local financial services sector. The Paris-based **FinTech cluster** is one of the biggest in continental Europe.

(Cont. page 14)



POLAND

The COVID-19 pandemic and switch to remote operations has accelerated digitisation in the Polish financial sector and created opportunities for UK companies which offer **innovative AI-based technologies for banking and insurance** to: ensure strong authentication and smooth service provision, automate processes, prevent cyberattacks and fraud and enhance customer experience.

PORTUGAL

With financial players facing increasing challenges such as the need to increase income, reduce operating costs and adjust business models to digitisation, **banks** and other **financial stakeholders are updating and developing their digital channels and creating synergies** with the **fintech companies** in an environment of co-operation.

Main **opportunities** for UK companies will lay on:

- Digital Banking /Open-Banking /Neobanks /
- Fintech/ Legaltech, Insurtech, Regtech
- Financial Crime & Cyber Fraud
- Blockchain/ Distributed ledger technology solutions/ CryptoCurrency
- ESG / Green Finance

SLOVAKIA

Rapid **rise of banking industry** provides space for constant **innovation** activities in the sector. Continuous demand for UK capabilities in **fintech and management/consultancy services**, due to innovation needs of the local financial services sector, incl. 'green finance' consultancy, optimization of cash processes; AI solutions (fintech); eGovernment services in the public sector; Big data & Data centres; Automation & Robotics; Legaltech; Insurtech.

(Cont. page 15)



SWEDEN

Stockholm-based companies account for nearly 90% of all fintech investment deals in Sweden and 85% in the respectively.

The fintech category payment and transfer continues to dominate the Nordic fintech investment scene where Klarna alone raised nearly € 2,2 bn during the past 18 months. Other areas **expected to grow** in the near future include **regtech**, **insurtech** and **green finance**. The case for the Swedish FinTech is strong: widespread adoption of digital financial services goes hand in hand with both public and private support for a **growing FinTech ecosystem and start-ups** in general. A large part of the reason why FinTech and start-ups are more prominent in Sweden and the ecosystem is stronger, is also due to cultural reasons. Success stories such as Spotify, King and Klarna, have made it more acceptable to take entrepreneurial risks.

Major opportunities within: **Regtech** due to the need to comply with the changing system of financial directives as well as anti-money laundering (AML) supervision following the AML issues in the Baltics with certain Nordic banks, including some changes to the Swedish AML regime that came into force in 2020.



COUNTRIES PRESENTING:

AUSTRIA

Building upon an already robust healthcare system, digital health solutions are a key element as Austria strives to strengthen Value-Based HealthCare and increase healthy life years in the long term. The following are the key focus areas aimed at making healthcare more accessible for everyone, thus reducing existing disparities and health inequalities: **telemedicine; e-prescription; digital triage; operational solutions; patient empowerment; chronic care and oncology; mental health; and remote care.** With the Austrian health system being decentralised consisting of more isolated data sets, particular focus is also placed on integrated real-time database management products and services. Countries which Austria looks to for best-practise examples to construct a landscape more welcoming for digital health technologies are the UK, Germany and the Nordic countries.

FINLAND

Finland's new Health and Social Services Reform is well underway and is designed to safeguard equal and quality health and social services for all. It will restructure the organisation of public healthcare and social welfare. The reform is used as an opportunity to **speed up the digitalisation** of Finnish public healthcare. The growing demand for **innovative health tech solutions** is driven by Finland's rapidly ageing population and the decreasing workforce of the healthcare sector. **Growing private healthcare sector** is also looking for new health tech solutions which might give them a competitive advantage.

(Cont. page 17)



GREECE

The main priorities for the Greek Ministry of Health are the creation of **National Digital Health Records**, the need to expand the use of **Telemedicine** with particular focus on homecare and teleconsultation, the creation of **Cancer records/Oncology regimens** and the need to address the challenge of **Digital readiness** of public hospitals, an area where Greece is significantly lagging behind, based on the practices of the NHS Digital Academy.

Furthermore, opportunities for UK companies lie in the **new health and safety requirements** under the C-19 pandemic, which have created demand for relevant applications.

IRELAND

The digital transformation of Ireland's healthcare system is well underway. €58m has also been allocated to eHealth projects as part of Budget 2021 in order to continue building on the acceleration of **deployment of effective eHealth solutions so far throughout the pandemic**. After developments in digital health had stalled in recent years, accelerated progress was seen in 2020. Ireland aims to go from a European digital health laggard to digital health leader by 2025 and is in line to achieve this. When considering **MedTech**, there is significant appetite amongst Irish healthcare providers and distributors to engage with companies who can provide **technology** that will **improve quality of care and patient outcomes**.

(Cont. page 18)



ITALY

Italy and UK healthcare systems have several similarities being both inspired to the Beveridge model. The pandemic outbreak has highlighted the urgency for an in depth modernisation of the healthcare system to cope with demographic changes and face future health challenges. To this aim Italy plans to invest a significant share of the EU Recovery Fund (roughly € 15 bn) to **upgrade healthcare infrastructures** and **technological equipment**, promote **research and innovation** thus creating opportunities in: **digital health, telemedicine** and **remote monitoring devices**; innovative **diagnostic equipment**, technologies/devices for **ageing population** and treatment of **chronic diseases** (Italy is the European country with the highest percentage of elderly population), **data management/ health electronic record solutions** to improve health events prevention and decision making processes.

POLAND

For Poland, **digitalisation, robotic surgery** and **AI-based technologies** are top priorities. Accelerated expansion of digital health services in PL during COVID-19 (remote diagnosis, consultation and treatment) and digital health technologies (screening, tracking, self-isolation and clinical management) created opportunities for UK companies; increased use of digital solutions increases the risk of cyberattacks therefore we see an opportunity in promoting **UK cybersecurity solutions** as well; Robotic surgery will be another area of focus. Polish public and private sector is more and more interested in implementing innovative technologies and AI-based technologies in healthcare to cope with the shortage of medical staff



COUNTRIES PRESENTING:

GERMANY

Germany accounts for a fourth of Europe's manufacturing market and is **home to Europe's largest manufacturers**. It is home of the world's largest industrial trade fair and a leader in smart manufacturing **technology trends**.

SPAIN

Industry is **going through a global transformation** known as the fourth industrial revolution influenced by technological breakthroughs. Industry 4.0 is the future of manufacturing leading to considerable and sustainable growth. There is a clear opportunity in this area in Spain, especially in the **Basque Country which is the most industrialized part of Spain** with 24.2% of its GDP being industrial. The UK is a global technology leader and with its state-of-art capabilities could effectively direct the digital transformation journey of the Spanish industrial companies.

THE NETHERLANDS

The Netherlands has positioned itself as an engineering powerhouse, with robust expertise across a number of fields that range from robotics and aeronautics to building design and sustainable development. Considering this, the Dutch government launched the **Smart Industry Implementation Agenda** in 2018, with the goal to have the most flexible and the best digitally connected production network in Europe, enabling the advanced manufacturing sector in the country to pioneer a variety of technologies that include: artificial intelligence, 3D printing, IoT and big data. Following this, the UK supply chain can find **opportunities in advanced materials and composites, automation and optimization**.



COUNTRIES PRESENTING:

ISRAEL

Israel's Infrastructure for Growth plans are ambitious. The Plan comprises over 200 projects with a total value of US\$120bn. Added to this plan, and the most significant infrastructure project currently being planned in Israel, is the Tel Aviv Metro which is valued at US\$50bn. The Metro will comprise 3 lines over 150 km, 109 underground stations, 4 maintenance depots with transformative oversite and adjacent developments that will span 24 municipalities plus 3/ 4 light rail lines. We know Israel is **keen to engage with international expertise** and we are positioning the UK/UK companies as a **potential partner** across a range of different **infrastructure projects**.

FRANCE

In France, Paris and Lyon metro networks are undergoing **large modernisation projects** that include the automation of metro vehicles and connection of heavy, medium and soft transport modes to create a more **synchronised user experience**. Another concern in the French transport network is **safety**, with great demand for solutions to secure the network and **use artificial intelligence** to identify hazards and use machine learning to prevent incidents. In addition, there are trials of autonomous trains taking place in the Bourgogne-Franche-Comté region that has attracted new **innovation** to ensure the safety of such train services.



COUNTRIES PRESENTING:

BELGIUM

In Belgium, digitisation and sustainability are key aspects of smart city developments for cities and communes. Up to now, several smart development initiatives are planned at different authority levels and could represent opportunities for UK companies. At administrative level, Belgium is for example looking at transforming its **healthcare, governmental and justice systems** through digitalization. At regional level, regional departments are looking at ways to make the **environment safer and smarter**. At city council level, numerous cities such as Antwerp, Brussels or Kortrijk are already involved in smart projects.

IRELAND

Ireland is working to position Dublin as a world leader in the development of **new urban solutions**, using open data, and with the city region as a test bed. Collectively, this data creates the evidence base to run cities more efficiently, productively, sustainably, healthily, transparently and fairly. Ireland is open to receiving expertise in **smart health, smart community building and improving liveability**. The Smart DCU scheme provides companies with access to a university campus that is used as a trial centre for innovation at scale.

(Cont. page 22)



LATVIA, LITHUANIA, ESTONIA

Smart cities in the three Baltic countries have been on top of the radar lately. **Vilnius** and **Tallinn** are being named among the smartest cities in Europe for a few years while **Riga** has ambitions to become the smartest in the region and is quickly catching up. These trends affect other cities and smaller towns across the region, which show interest in smart cities solutions as well. Following a scoping exercise performed in the beginning of 2021, the following areas of interest were identified: various **smart mobility and infrastructure solutions**, solutions increasing **sustainability** and promoting **green agenda**, also (perhaps in earlier stages) **smart health/ healthy lifestyle** promotion and **citizens' engagement**.

PORTUGAL

The Smart Cities and Future Mobility areas are considered a priority by the Portuguese government, as well as an increasing number of municipalities. Investment in sustainability projects for urban areas is expected to increase in Portugal over the next decade, boosted by **Government's Digital Transition Strategy and Recovery and Resilience Plan (EU funded)** and the need to **tackle the negative and long-term impact of the pandemic** and socio-economic changes on cities' economies, competitiveness and quality of life. We are currently exploring opportunities linked to **tech for sustainability and Smart Cities** in Portugal, also in advance to a possible UK participation in the Portugal Smart Cities Summit 2022.



COUNTRIES PRESENTING:

BELGIUM

Located at the crossroads of Western Europe, Belgium enjoys a **key position in the EU and is home to numerous ICT companies**. Telecom in Belgium is a **highly regulated, innovative and competitive market** which does not only limit itself to telecommunications and which therefore allows broad perspectives of opportunities for UK tech companies. The main players active in the country Proximus and Telenet/Base have for example both been involved in projects in relation to HealthTech, 5G or smart buildings, clearing the way for interest in many innovative technologies.

FRANCE

With France's **National Strategy on Future Technologies for 5G and Telecommunications Networks**, this is an ideal time to open up dialogue at the industrial & policy levels, while offering UK suppliers of **innovative 5G technologies business opportunities** in France. France acceleration strategy aims to mobilise €480 million of public funding to support priority projects by 2022, and aims for up to €735 million of public funding by 2025, which will leverage up to €1.7 billion of investment by 2025. There is also a growing and dynamic demand for more **Datacentres** to be built to underpin the digitisation of the economy, increase computing capabilities, enable data sovereignty and offers opportunities for **cloud** and distributed **cloud-based services**, innovation in **greening the sector** and make it even more **secure**.

SPAIN

Spain has **prioritised the digitalisation** of their economy. **Telecoms companies play a key role to help the government fulfil this ambition** in two key aspects – their **relationships with both consumer and company accounts**, and their **investment in digital infrastructure**, especially in **5G**. In Spain we are working with companies such as Telefonica, Cellnex, and Vodafone to help introduce innovative UK companies to them that can help achieve these goals.



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