



WERE CZECH INDUSTRIAL POLICY INTERESTS REFLECTED IN EU 2024-2029 STRATEGIC AGENDA DISCUSSIONS?

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Introduction: The return of industrial policy

In recent years, we have been witnessing the return of sectoral industrial policy both to the EU and global stage. Following decades of liberalism and globalization, both the European Commission and national governments are shifting their focus towards identifying and subsequently supporting domestic “strategic industries”.¹ These are deemed crucial for the bloc to reach its decarbonisation goals, promote resilience, strategic autonomy and competitiveness in the context of the ongoing heightened geopolitical tensions and twin transition.² According to proponents of industrial policy, these sectors therefore deserve targeted governmental support, which can be provided through various instruments.³ On the EU level, the relaxation of the EU state aid and competition rules within the so-called Temporary Crisis and Transition Framework⁴, which allows the Member States to subsidize their national industries, was one of the most discussed and controversial industrial measures in the past 5 years.

Following the European Parliament elections in June 2024, a new European Commission (EC) will start its mandate. As a guidance for the executive’s actions in the following 5 years, the leaders of the European Council (EUCO) shall adopt its strategic agenda (SA) at the end of June 2024, where “resilience and competitiveness” will be among the priorities.⁵ In this context, two former Italian Prime Ministers, Enrico Letta and Mario Draghi, had been tasked to prepare

1 Tagliapietra and Veugelers, ‘Industrial Policy in Europe: Past and Future’; Zavorská et al., ‘Industrial Policy for a New Growth Model: A Toolbox for EU-CEE Countries’.

2 Strategic sectors can include, inter alia, critical raw materials crucial for the twin transition (like lithium), chips, batteries or pharmaceuticals.

3 Tagliapietra and Veugelers, ‘Industrial Policy in Europe: Past and Future’.; Industrial policy instruments have traditionally included trade barriers on imports, subsidizing of local industries, preferential treatment of selected firms in public procurement, targeted R&D investments, nationalization of strategic industries, private-public partnerships and others

4 European Commission, ‘Temporary Crisis and Transition Framework - European Commission’.

5 European Council, ‘EU Strategic Agenda 2024–2029’.

reports and make suggestions on how to improve the Single Market and EU competitiveness. Letta's high level report on the Single Market ("Letta Report") was published in April 2024, while the report of Mario Draghi on competitiveness shall come out later during the summer.⁶

Like other EU Member States, Czechia enters the new era of a more proactive, sectoral industrial policy as a country with specific interests. **The aim of this policy brief is to outline how these interests were reflected in debates leading up to the adoption of 2024-2029 strategic agenda.** After defining the Czech interests regarding the industrial policy, the brief will review the industrial policy commitments made in the EUCO conclusions leading to the SA adoption, and the industrial chapters of the Letta Report. Subsequently, the brief will discuss to what extent Czech interests were reflected in these documents.

Methodologically, the brief relies on the analysis of the Letta Report and EUCO conclusions, as well as on relevant secondary literature. The method will be complemented by insights from interviews with relevant stakeholders, from the roundtable "*A more ambitious EU industrial policy: Role of Czechia and other Central European countries*", organized by EUROPEUM in March 2024 in Brussels⁷, and from closed discussions.

Liberal or progressive? Defining Czech interests in EU industrial policy

This section first sketches the key characteristics of the Czech economy. Secondly, it discusses two alternative approaches to industrial policy: the liberal and progressive one. Based on this, it defines Czech interests in the EU industrial policy.

⁶ Robustelli, 'Draghi and Letta Axis to Forge Tomorrow's Europe'.

⁷ This event was held according to Chatham House Rule

Within the EU, the Czech economy is above average both in its openness and in its orientation on manufacturing. At the beginning of 2020s, almost three quarters of Czech GDP consisted of foreign exports, predominantly to other EU countries,⁸ while the value added from manufacturing stood at 25 % of Czech GDP, compared to the 15 % of EU average.⁹ The Czech economy can also be characterized as semi-peripheral (or semi-central¹⁰). Rather than specializing in better valued tasks within the value chains, it is still predominantly a factory economy, heavily reliant on foreign direct investment¹¹ and lagging behind the core EU states both in research and development¹², and wages.¹³ The country is a part of the so-called Central European Manufacturing Core, where the firms (predominantly focused on automotive and electronics) are headquartered in Germany with subsidiaries in the Visegrad 4 states.¹⁴

In light of this, Czech governments, irrespective of their party affiliations, consistently strive to keep the European and Czech industry open and competitive¹⁵, considering also the interests of energy intensive industries located in the country.¹⁶ They perceive the ongoing global shift from free trade to securitization of trade policies, and from horizontal to sectoral industrial

⁸ Marek, Franče, and Pastucha, 'Výhled České Ekonomiky Na Rok 2022: Sezona Pozvolného Návratu'.

⁹ Vienna Institute for International Economic Studies, 'Industrial Policy for a New Growth Model: Country Briefing Czechia'.

¹⁰ Ministry of Industry and Trade employee, Interview.

¹¹ Marek, Němec, and Tkáčik, 'Made in the World: Analýza Českého Zahraničního Obchodu a Pozice v Globálních Hodnotových Řetězcích'; Grieveson et al., 'Avoiding a Trap and Embracing the Megatrends: Proposals for a New Growth Model in EU-CEE'.

¹² European Commission, 'European Innovation Scoreboard - European Commission'.

¹³ Eurostat, 'New Indicator on Annual Average Salaries in the EU - Eurostat'.

¹⁴ Zavorská et al., 'Industrial Policy for a New Growth Model: A Toolbox for EU-CEE Countries'.

¹⁵ Vláda ČR, 'Strategie Působení ČR v EU: Aktivní Politika pro Růst a Konkurenceschopnou Evropu'; Participant, "'A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries" Roundtable'.

¹⁶ Ministry of Industry and Trade employee, Interview.

policies as a threat to Czech interests,¹⁷ because it limits exporting opportunities outside of the EU and also distorts the level playing field in the Single Market.¹⁸ After all, the seamless functioning of the Single Market, including in services, has been a top policy priority of Czechia since its 2004 EU accession.¹⁹ Unsurprisingly then, Czechia has been assuming liberal positions in the ongoing debate on the EU industrial policy. It would prefer the EU keeps focusing on removing barriers in the Single Market and setting favourable horizontal conditions for all European businesses, rather than choosing strategic industries in advance and targeting support only at them.²⁰ These positions can, in sum, be coined as a **liberal approach** to the EU economic and industrial policies, which clearly dominates the Czech public debate and governmental positions.²¹

The alternative **progressive approach** perceives industrial policy as a developmental tool and its current onset as an opportunity for Czechia. Industrial policy instruments, if well targeted and implemented, have the potential to help semi-peripheral countries to grow strategic domestic industries, diversify their economic models, reorient towards higher added value tasks and

¹⁷ Ministry of Industry and Trade employee; Participant, “A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries” Roundtable’.

¹⁸ Participant, “A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries” Roundtable’; Ministry of Industry and Trade employee, Interview.

¹⁹ Ministry of Industry and Trade of the Czech Republic, ‘Priority ČR v Agendě Vnitřního Trhu EU 2021-2025’; Vláda ČR, ‘Strategie Působení ČR v EU: Aktivní Politika pro Růst a Konkurenceschopnou Evropu’.

²⁰ Participant, “A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries” Roundtable’.; Packroff, ‘Smaller EU Countries Revolt against State Aid Spree’.

²¹ This dominance of the liberal approach can be explained by the fact that it capitalizes on the already identified strengths of local industry: its deep integration into the EU and global value chains and its competitive advantage of providing foreign firms a geographical closeness and skilled, but relatively cheap labour. The fear of a more interventionist approach to EU industrial and economic policies may also be informed by the negative experience with state economy planning from the communist times, lack of state capacities to administer effective support for strategic industries and by fears of disrupting the established FDI dependent model of the Czech economy.

subsequently close the innovation and wage gap with the economic cores.²² While many of these interventions would have to be done at the national level (national subsidies, public R&D investments, tweaking local export and FDI strategies, use of state owned firms...), the progressive approach also has implications for the EU level industrial policies. These would have to be better aligned with the EU cohesion goals, tailored to specific regional needs and strengths and geographically target also the economically lagging regions of the EU.²³ While progressive approach proponents also acknowledge that maintaining demand for local industrial products is important, they point out that it can be generated also through stimulating domestic demand in the EU, rather than solely focusing on foreign exports.²⁴ Even though it remains rather marginal, elements of the progressive approach are also evident in some Czech positions on the EU industrial policy. Notably, both the government²⁵ and businesses²⁶ claim it is important to reorient the Czech economy towards higher added value tasks and warn that should the EU industrial policy remain dependent on national subsidy schemes, it is potentially detrimental for cohesion.²⁷ Similarly to the liberal approach, this progressive perspective is also critical of relaxing state aid and

²² Hrubý, 'Rethinking Industrial Policy for Central and Eastern Europe'; Chang, 'Industrial Policy in East Asia: Lessons for Europe'; Zavorská et al., 'Industrial Policy for a New Growth Model: A Toolbox for EU-CEE Countries'; Grieveson et al., 'Avoiding a Trap and Embracing the Megatrends: Proposals for a New Growth Model in EU-CEE'; Cherif and Hasanov, 'The Return of the Policy That Shall Not Be Named: Principles of Industrial Policy'.

²³ European Commission, 'Forging a Sustainable Future Together: Cohesion for a Competitive and Inclusive Europe: Report of the High-Level Group on The Future of Cohesion Policy'.

²⁴ Nolke, 'Germany's Dangerous Export Fetish'; Šitera, 'Vyléčit se ze závislosti na globalizaci. Novoroční předsevzetí pro Evropu i Česko'.

²⁵ Participant, "'A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries" Roundtable'; Vláda ČR, 'Programové Prohlášení Vlády České Republiky'.

²⁶ Druhá ekonomická transformace, 'Druhá Ekonomická Transformace'.

²⁷ Participant, "'A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries" Roundtable'; Ministry of Industry and Trade employee, Interview.; Panel participant

competition rules, as this favours already rich regions²⁸, posing a threat to the European cohesion.

While Czech interests in the EU industrial policy differ, according to the proponents of liberal and progressive approaches, they still share some common grounds. Firstly, proponents of both these approaches **criticize the relaxation of the state aid rules that favour big EU states**, as this undermines both the level playing field in the Single Market, and EU cohesion. Secondly, **they both call to reorient Czech economy towards higher added value tasks**, including in the least developed regions. Thirdly, both approaches believe that it is important to **maintain demand for Czech industrial products**. However, to achieve this, these approaches suggest different paths. Competitiveness, the Single Market and external trade play pivotal role according to the dominant liberal approach, while upgrading the purchasing power of the EU consumers is crucial for the progressive approach.

Industrial policy in the strategic agenda and the Letta Report

The following section will outline how the above described Czech interests in industrial policy – setting stricter EU state aid rules, reorienting Czechia towards higher added value tasks and maintaining demand for the Czech and EU industrial products – are reflected in the European Council conclusions leading up to the SA adoption and in the Letta Report.

Strategic agenda conclusions

The EU 2024-2029 strategic agenda was first discussed by the leaders of the EU states during the Granada informal European Council in October 2023.²⁹ Between this EUCO and the final adoption of SA in June 2024, the leaders discussed economic topics at the EUCO level two times: in October 2023 and April 2024.

²⁸ Liboreiro, 'Germany & France Account for Most EU Subsidies. Why Is That a Concern?'

²⁹ European Council, 'The Granada Declaration'.

A leaked outline of the SA from April 2024³⁰ provides further insight into the priorities the EUCO will set for the incoming European Commission.

Conclusions from the EUCO meetings³¹, as well as the outline, acknowledge that industrial policy will be needed to support the EU strategic sectors in green tech, digital and security during the upcoming 5 years. Regarding **state aid**, importance of maintaining the level playing field in the Single Market is highlighted in all these documents. This signifies that in the future, the EU states may be less willing to tolerate national state aid schemes. Should the Member States wish to provide public financing to strategic industries, European level funding will need to be sourced and utilized to this end.³² Regarding the Czech interest to **upgrade the added value of its businesses**, the Granada declaration specifically calls for the EU to focus on “high added value where the continent can become a frontrunner”³³, but this intention is aimed at the entire continent. Little attention is given to cohesion, or place-based industrial policies thorough the SA documents. Regarding the interest to **maintain demand** for Czech products, the ongoing EU wide shift of focus from green ambitions to competitiveness³⁴ is evident in the SA documents. Notably, the leaked 2024-2029 SA outline³⁵ focuses primarily on security and competitiveness at the expense of climate or social issues, especially when compared to the 2019-2024 SA.³⁶ This means that in the upcoming 5 years, the EU will clearly strive to maintain competitiveness, and demand for its

³⁰ European Council, 'OUTLINE: STRATEGIC AGENDA 2024-2029'.

³¹ European Council, 'The Granada Declaration'; European Council, 'European Council Meeting (26 and 27 October 2023)- Conclusions'; European Council, 'Special Meeting of the European Council (17 and 18 April 2024) – Conclusions'.

³² Ministry of Industry and Trade employee, Interview.

³³ European Council, 'The Granada Declaration'.

³⁴ Liboreiro, 'State of the European Union: Five Takeaways from Ursula von Der Leyen's Speech | Euronews'.

³⁵ European Council, 'OUTLINE: STRATEGIC AGENDA 2024-2029'.

³⁶ Open for Climate Dialogue, 'Breaking News'.

products globally (in line with the liberal approach), rather than focusing on the domestic demand (progressive approach).

Industrial policy in the Letta Report

Enrico Letta's report *Much More Than a Market: Speed, security, solidarity*³⁷ does not dedicate any chapter specifically to industrial policy, but its resurgence, motivated by geopolitical competition and the twin transition, is taken for granted throughout the document.

Letta addresses the contentious debate **on state aid** and European champions (p. 39). He acknowledges that the Temporary Crisis and Transition Framework has fragmented the Single Market and that the ongoing resurgence of industrial policy in the EU creates a risk of widening, rather than effacing regional inequalities within the union (p.90). To remedy this situation, Letta argues that a more Europeanized approach to industrial policy is needed. He specifically suggests the creation of a so-called "state-aid contribution mechanism", which would oblige the Member States to contribute to a joint pool of resources dedicated to European level state-aid whenever they decide to provide state aid to their domestic industries (p.26-27). Letta also claims that there should be strong conditionalities³⁸ for providing state-aid, which would ensure that the supported industries have a joint European goal and engage partners from multiple states (p.39-40). The EU's Important Projects of Common European Interests (IPCEIs)³⁹, which include such conditionalities, is a model that should be followed and expanded in the EU industrial policy, he recommends.

³⁷ Letta, 'Much More than a Market: Speed, Security, Solidarity. Empowering the Single Market to Deliver a Sustainable Future for All EU Citizens'.

³⁸ Mazzucato and Rodrik, 'Industrial Policy with Conditionalities: A Taxonomy and Sample Cases'.

³⁹ European Commission, Communication from the Commission Criteria for the analysis of the compatibility with the internal market of State aid to promote the execution of important projects of common European interest 2021/C 528/02.

Regarding the question of **added value of the EU and Czech businesses**, Letta believes the EU should increase its collective added value. Specifically, it should strive to create leadership in cutting edge green and digital technologies, building its own industrial base in these sectors (p. 20). At the same time, he also dedicates a significant portion of his report to convergence. While not specifically acknowledging the characteristics of dependent semi-peripheral economies at the Eastern periphery of the EU, he concedes that growth has been too concentrated in and around big cities (p.95). To help the EU's lagging and peripheral regions, he believes that cohesion policy needs to be better aligned with EU Single Market, industrial and social policies. He also argues that these policies should be place based – or tailored to specific regional needs and strengths (p.96).

Regarding the Czech interest to maintain **demand for local industrial products**, Letta clearly states his support for the free trade and the Single Market, which he believes are the engines of the EU growth and convergence (p.9, 92). He also believes that the Single Market needs to be expanded to new areas of finance, energy and telecom markets, as the integration of these sectors has been underdeveloped so far. This, he believes, is a condition for the EU industrial policy to work (p.9, p.20). On the other hand, the report does not dedicate much space⁴⁰ specifically to removing Single Market obstacles⁴¹. In general, Letta speaks in favour of improving the EU competitiveness, which is a way to increase demand for EU and Czech industrial products, but he doesn't do that enough, especially in the eyes of liberal Czech policymakers.⁴²

⁴⁰ Ministry of Industry and Trade employee, Interview.

⁴¹ insufficiently harmonized or enforced Single Market rules; differing permitting and administrative procedures; lack of recognition of qualifications, barriers to the posting of workers etc.

⁴² Ministerstvo průmyslu a obchodu, 'Lettova zpráva říká, že vnitřní trh EU potřebuje restart. Jaké změny navrhuje?'; Ministry of Industry and Trade employee, Interview.

Debate and conclusions

The following section discusses how the reviewed documents consider Czech interests in industrial policy, as they were outlined in section 2. Specifically, it will focus on state aid, upgrading the Czech position in global value chains and maintaining demand for Czech industrial products, while considering both the liberal and progressive approaches to these interests.

Regarding **state aid**, the rising acknowledgement that the Temporary Crisis and Transition Framework distorts the Single Market, is evident both in the SA documents and the Letta Report. This is positive both from the Single Market (liberal) and the convergence (progressive) perspective on Czech industrial policy priorities, because it considers the existing concerns both about the Single Market level playing field and about unfavourable impacts this has on EU regional cohesion. It seems that more permanent state aid rules will need to be created to facilitate the EU industrial policy, and that these rules will have to be both stricter and more Europeanized.⁴³ However, it is not yet clear in which way this Europeanization of state aid will occur. Should state aid be aimed at sectors, or pan-European value chains? And could Enrico Letta's state aid contribution mechanism work?⁴⁴ Lastly, where to find money for a pan-European industrial policy and state aid, if the Czech (but also other) governments are sceptical of increasing the EU budget? Can private investments, and a better integrated Capital Markets Union, which Letta also advocates for, be the answer?⁴⁵ While the discontinuation of state aid relaxations in their current form is clearly in line with the Czech industrial policy position, it is not yet clear how state aid will work in the future and if it will indeed serve the Czech interests.

⁴³ 'Roundtable'; Ministry of Industry and Trade employee, Interview.

⁴⁴ Participant, "A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries" Roundtable'; Ministry of Industry and Trade employee, Interview.

⁴⁵ Mathiesen et al., 'A New Inconvenient Truth'; 'Roundtable'.

Moving on to the **Czech interest to upgrade its position in the value chains**, both the Letta Report and the SA documents focus primarily on (re)creating a pan-European industry base with a high added value. Through developing its own leading companies specializing in green and digital tech the continent could avoid becoming dependent on other global superpowers (or in other words, becoming a continent-wide economic periphery). While this is certainly in the interest of the Czech industrialised economy⁴⁶, there is a risk that European leading industry corporations will once again not be headquartered in Czechia and other V4 states, which will keep their sub-par positions of Europe's assembly lines.⁴⁷ While convergence and the place based approach to the EU industrial and Single Market policies is advocated for in the Letta Report, these concerns are missing in the SA documents. Therefore, geographical scale matters when considering whether the Czech industrial policy interests were reflected in the debates leading to the 2024-2029 SA adoption: It would be positive for Czechia if the EU as a whole manages to keep and upgrade its added value in the global value chains. But in relation to developing added value specifically in Czechia and its lagging regions, not much is to be expected from the incoming European Commission, should the current SA guidelines be followed.

Regarding the interest to **maintain demand for Czech industrial products**, the SA documents especially indicate that the EU's focus is shifting from decarbonisation towards competitiveness, security and resilience.⁴⁸ As Czechia is a long term proponent of the liberal approach – and laggard of the EU decarbonisation policy⁴⁹ – its policymakers are clearly in favour of this

⁴⁶ Participant, "A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries" Roundtable'.

⁴⁷ Grieveson et al., 'Avoiding a Trap and Embracing the Megatrends: Proposals for a New Growth Model in EU-CEE'; Gerasimcikova, 'The EU's Green Deal Industrial Plan Is a Windfall for Corporations'.

⁴⁸ Pristach et al., 'Evropská Unie a Nová Strategická Agenda'; 'Roundtable'.

⁴⁹ Grieveson et al., 'Avoiding a Trap and Embracing the Megatrends: Proposals for a New Growth Model in EU-CEE'.

development⁵⁰, which they also believe will increase the falling demand for European industrial products. Therefore, the current outline of the SA is in line with the liberal Czech interests in industrial policy. The progressive approach, which would focus more on social issues and Europeans' purchasing power is currently not at the forefront of the agenda of the Czech government, nor of the anticipated EU strategic agenda.

Determining how Czech interests in industrial policy were reflected in the EU debates leading up to the 2024-2029 SA adoption is no easy task. Firstly, because Czech interests can be defined in different ways. And secondly, because the analysed documents are very complex: Letta's 146-page report has been criticized for being excessively vague and not presenting a coherent political agenda⁵¹, while the EUCO conclusions, in their usual format, strive to reconcile so many contradictory interests that their general direction can appear fuzzy. Still, some key conclusions can be drawn from the analysis of these documents. Most notably, the rising criticism of **national state aid schemes** in the conclusions and the Letta Report is clearly a positive development for the Czechia. It is also positive for the Czech industrial economy that according to all these documents, the EU shall strive to maintain its industrial base and **develop its added value**. Lastly, regarding **demand for Czech industrial products**, the EUCO's heightened accent on competitiveness, instead of decarbonisation, is viewed positively by the Czech liberal government, as it can boost global demand for these products. However, the SA conclusions, in particular lack accent on cohesion, social issues and on tailoring industrial policy specifically to the needs of economically weak and peripheral regions.

⁵⁰ Participant, "A More Ambitious EU Industrial Policy: Role of Czechia and Other Central European Countries" Roundtable; 'Roundtable'; Ministry of Industry and Trade employee, Interview; Pristach et al., 'Evropská Unie a Nová Strategická Agenda'.

⁵¹ Berg and Meyers, 'Enrico Letta's Report'; Ministry of Industry and Trade employee, Interview.

To further determine how well Czech industrial policy interests will be reflected in the next Commission's priorities, the final strategic agenda and the EC President letters to his college will provide additional guidance.

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