Statistics in focus

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Community Innovation Survey 1997/1998

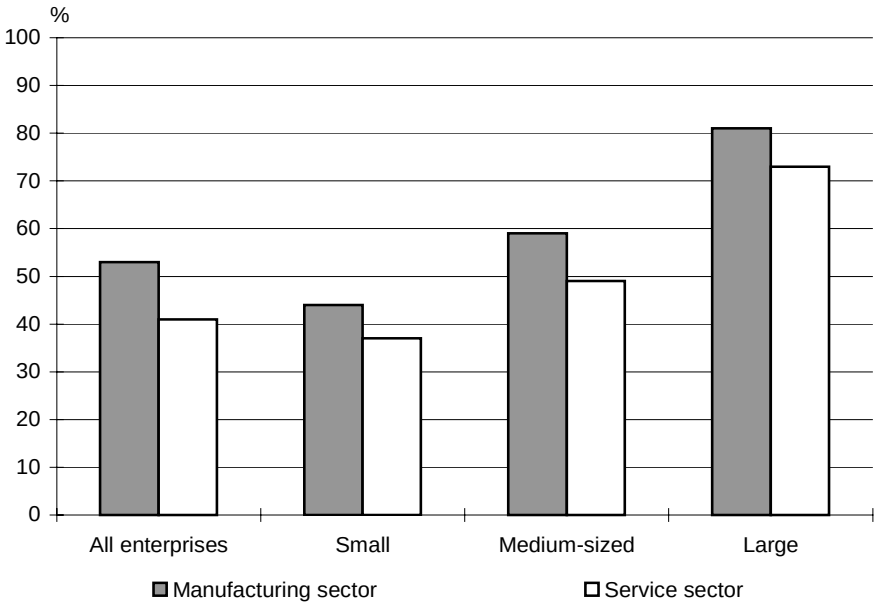
Frank FOYN

Innovating enterprises

On average 53 percent of all enterprises in manufacturing sector in 12 EEA[(1)] Member States was innovative in the period 1994-96 (1995-97). An innovating enterprise has either introduced new or improved products on the market or has introduced new processes. Large enterprises are definitely more innovative than small and medium-sized enterprises. 81 percent of enterprises with more than 250 employees were innovative, while the percentage for medium-sized and small enterprises was 59 and 44 respectively. The figures are preliminary results from the second Community Innovation Survey (CIS2). Final results will be available in 3rd quarter.

This general picture is common for all the countries, but with some deviations. In Germany and Ireland the differences between large and small enterprises are lower than in the other countries. In Spain, Luxembourg and Finland the differences are larger.

Figure 1. Number of innovating enterprises by size-class. Percentage



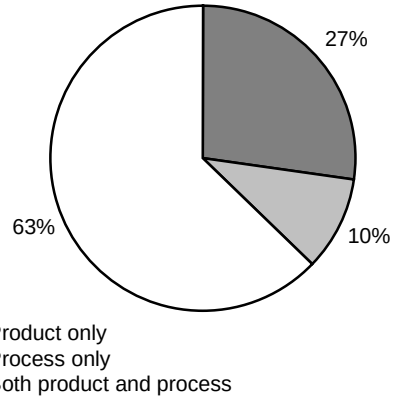
[(1)] *European Economic Area (EU and EFTA)*

Sectors with high percentage of innovators are Chemical and chemical products, Machinery and equipment and Electrical and optical equipment.

Of all manufacturing enterprises 48 percent have developed new products. For around 40 percent of these enterprises the products were also new to the market. 39 percent of all enterprises had developed new processes.

In the service sectors covered by the survey 41 percent of the enterprises were innovative, that means less innovative than the manufacturing sector. The same structure by size-class appears in the service sector; 73 percent of the large enterprises were innovative compared to 49 and 37 for the medium-sized and the small ones.

Figure 2. Innovating enterprises by type of innovation, in manufacturing. Relative distribution



Innovation intensity

On average, the expenditure on innovation activities for the manufacturing enterprises represented 4 percent of the turnover in the sector. In general the innovation intensity was highest among the large enterprises, but there was no significant difference between the medium-sized and small ones. The sectors with the highest innovation intensity were much the same as the sectors with the highest share of innovators. Among the countries the structure was a little complex and differences between the countries should be treated with caution. The innovation intensity has highest value for Sweden and lowest for Spain.

In the service sector the innovation intensity was just below 3 percent on average, excluding Wholesale trade and Financial inter-mediation. Due to the concept of turnover in these sectors the figures for innovation intensity are not comparable with the other sectors.

With innovation activities are meant research and development, acquisition of machinery, equipment and other external technology, industrial design, training and marketing linked to technological innovations. Quantification of these costs was one of the main difficulties in the survey.

Turnover of new products

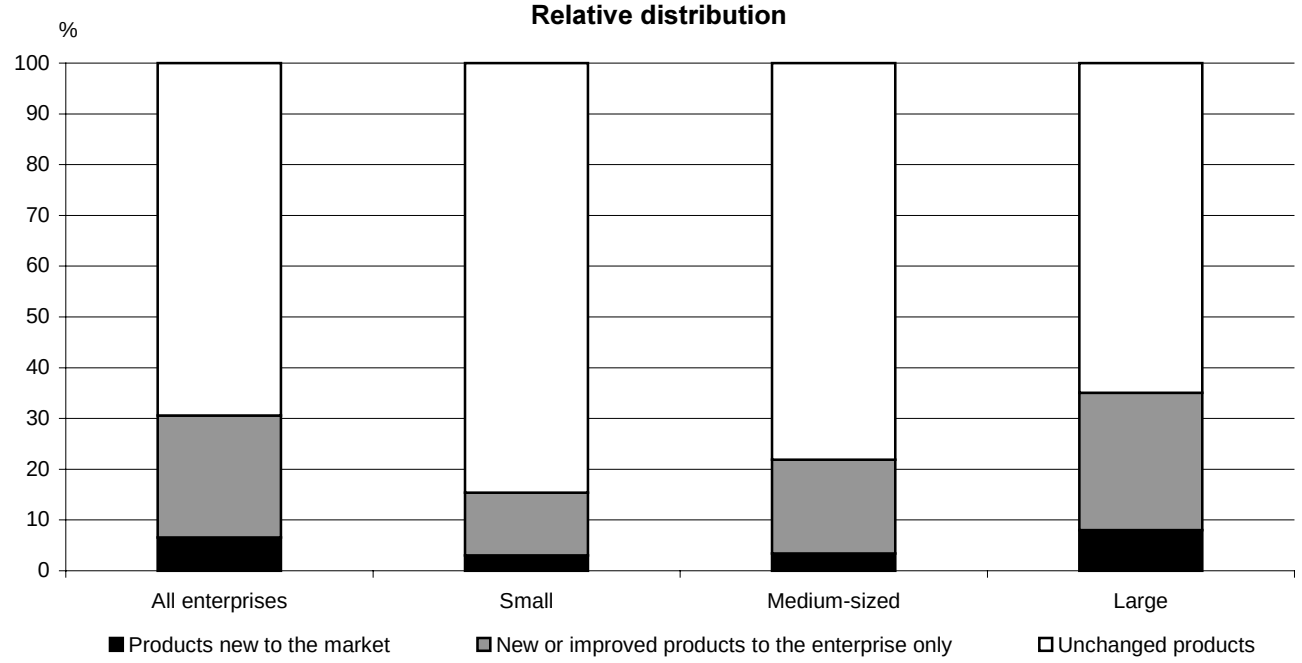
One important indicator on the impact of innovation activities is the relative share of the turnover of new or improved products. 31 percent of turnover in the manufacturing sector was new or improved products for the enterprises introduced in the market the last 3 years. Not all this turnover was really new or improved products for the market. Approximately only 7 percent of the turnover was brand new products for the market.

Large enterprises had the highest proportion of new products in the turnover. They are also largely affecting the average value since large enterprises contribute to about 70 percent of the total turnover in the sector. In small enterprises 15 percent of turnover consists of new or improved products.

Taking only innovating enterprises into account, the difference between the size-classes is nearly eliminated. The share of new products for small and medium-sized product-innovators is just below the share for large enterprises.

Of conceptual reasons this question was not asked to the enterprises in the service sector.

Figure 3. Turnover of new or improved products in manufacturing by size-class. Relative distribution



Objectives for innovation

On a specified list of different objectives, Improving product or service quality was the most important objective for innovation activity. 60 percent of the innovators in Manufacturing and 68 percent in Services reported this to be very important. This was the dominating objective for all size-classes. Extend product or service range and Open up new markets or increase market share were also reported as important objectives. In the manufacturing sectors in Belgium, France, Ireland and Luxembourg new markets / market share was reported as more important than Improving product quality.

Innovation activity to Fulfil regulations and standards or to Reduce material and energy consumption or environmental damage was of minor importance, also Replace products being phased out.

Table 1: Objectives considered as very important for innovation. Percentage of innovating enterprises

	Manufacturing	Services
Replace products / services being phased out	25	18
Improving product / service quality	60	68
Extend product / service range	46	49
Open up new markets or increase market share	54	48
Fulfilling regulations ans standards	22	17
Improve production / internal business process flexibility	33	40
Reduce labour costs	40	38
Reduce material consumption	31	18
Reduce energy consumption	23	16
Reduce environmental damage	25	18

Sources of information

The dominating sources of information for innovation in the manufacturing sector are Clients or customers and Sources within the enterprise or within the enterprise group. This is valid for all size-classes, but the importance of Sources within the enterprise increases with the size of the enterprise. This seems reasonable since the internal human information base is higher in large enterprises. Which of the main sources is the most important one depends on the countries. It is difficult to find a structure and reason for this difference. There is tendency that Clients or customers are more important in the Nordic and Anglo-Saxon countries, but also in Austria and Belgium the importance of clients or customers is high.

In the service sector the picture is much the same, but the importance of Clients or customers seems less dominant.

Table 2: Sources of information considered as very important for innovation. Percentage of innovating enterprises

	Manufacturing	Services
Sources within the enterprises	51	52
Other enterprises within the enterprise group	26	39
Competitors	18	19
Clients or customers	46	38
Consultancy enterprises	4	11
Suppliers of equipment;material;components or software	19	18
Universities or other higher education institutes	5	5
Government or private non-profit research institutes	3	3
Patent disclosures	3	1
Professional conferences;meetings;journals	8	15
Computer based information networks	4	11
Fairs and exhibitions	21	17

Hampering factors

In the survey the enterprises were asked if some innovation projects either had been seriously delayed, been abolished or not even started. 48 percent of the enterprises in the manufacturing sector and 49 percent in the service sector reported to have such cases. Of these categories Seriously delayed projects was most frequent.

In addition the enterprises were asked about the main hampering factors for such projects. In manufacturing sector economic factors were important obstacles for all the three types of unsuccessful projects, that means Excessive perceived economic risks, Innovation costs too high and Lack of appropriate sources of finance. All these factors were important obstacles for projects not yet started, while Lack of sources of finance was not so important for abolished projects. For projects seriously delayed a variety of other factors were also crucial without any dominating factor.

The picture was much the same for the service sector. But for seriously delayed projects Organisational rigidities and Lack of qualified personel were larger obstacles than economic factors.

Table 3. Hampering factors for projects with progress problems. Percentage of innovating enterprises

	Seriously delayed projects		Abolished projects		Not even started projects	
	Manufacturing	Services	Manufacturing	Services	Manufacturing	Services
Projects with progress problems.	35	38	21	15	19	26
Hampering factors. (proportion of enterprises within each category)						
Excessive perceived economic risks	24	18	36	34	39	54
Innovation costs too high	26	25	30	33	40	42
Lack of appropriate sources of finance	25	27	17	30	35	55
Organisational rigidities	31	46	12	21	15	20
Lack of qualified personnel	36	40	12	19	21	22
Lack of information on technology	24	14	11	16	14	10
Lack of information on markets	19	13	11	12	19	19
Fulfilling regulations and standards	19	19	10	15	15	24
Lack of customers responsiveness to new products	16	13	28	25	16	18

Table 4. Number of innovating[1] enterprises by country, NACE and size-class. Percentage

Codes	BREAKDOWN	B[2]	D	E	F	IRL	L	NL[3]	A	FIN	S	UK	NOR	TOTAL
	Manufacturing sector, total	27	69	29	43	73	42	62	67	36	54	59	48	53
	Size-class													
20-49	Small	22	63	21	34	68	21	54	59	26	43	54	39	44
50-249	Medium-sized	29	70	43	48	78	52	71	73	40	61	59	56	59
250 +	Large	50	85	76	75	85	85	84	88	77	79	81	77	81
	NACE													
15-19	Food products; beverages and tobacco;Textiles and leather	17	66	20	38	62	15	56	62	30	40	57	47	45
20-22	Wood;pulp and paper;publishing	21	59	21	32	68	43	53	62	30	45	51	36	45
23-26	Coke;chemicals;rubber and plastic;other non-metallic minerals	34	69	40	55	79	52	73	50	49	59	62	60	58
27-28	Basic metals and fabricated metal products	30	59	25	31	68	44	53	68	31	41	56	43	47
29-33	Machinery and equipment NEC;Electrical and optical equipment	44	81	50	62	88	61	78	83	44	74	70	64	71
34-37	Transport equipment and manufacturing NEC	25	70	30	43	77	0	59	82	28	58	52	47	52
40-41	Electricity; gas and water distribution	60	37	37	24	n.a.	n.a.	58	22	19	n.a.	64	24	36
	Service sector, total	13	46	n.a.	31	58	48	36	55	24	32	40	22	41
	Size-class													
10-49	Small	11	41	n.a.	25	60	45	32	54	22	29	40	20	37
50-249	Medium-sized	21	60	n.a.	33	49	55	45	58	30	48	37	26	49
250 +	Large	55	83	n.a.	73	87	83	71	74	43	45	55	50	73
	NACE													
51	Whole sale trade and commission trade	10	39	n.a.	n.a.	52	37	36	58	15	29	33	18	35
60-62, 64.2	Transport and telecommunications	9	26	n.a.	12	38	57	22	54	22	20	36	7	25
65-67	Financial inter-mediation	13	69	n.a.	45	67	43	40	55	28	56	49	44	55
72, 74.2	Computer and related activities;Engineering services	42	63	n.a.	46	75	83	58	41	44	50	56	42	59

n.a. : Non available

(1) : An innovating enterprises is an enterprise who has introduced new or improved products on the market or new or improved processes. Enterprises with innovation activity without finished projects are not included.

(2) : Preliminary results

(3) : In NL, medium-sized is defined as 50 to 199 and large as more than 200 employees.

Table 5. Innovation expenditures by country, NACE and size-class. Percentage of total turnover

Codes	BREAKDOWN	B(2)	D	E	F	IRL	NL(3)	A	FIN	S	UK	NOR	TOTAL
	Manufacturing sector, total	2.2	4.1	1.8	3.9	3.3	3.8	3.5	4.3	7.0	3.2	2.7	3.8
	Size-class												
20-49	Small	1.5	3.3	1.0	1.4	2.8	3.0	4.4	1.6	2.6	3.3	2.2	2.3
50-249	Medium-sized	1.2	2.4	1.6	2.2	3.2	1.8	3.1	1.6	2.7	2.9	2.8	2.3
250 +	Large	2.6	4.7	2.2	4.8	3.7	4.6	3.5	5.1	8.2	3.2	2.8	4.4
	of which												
23-26	Coke;chemicals;rubber and plastic;other non-metallic minerals	2.7	5.0	1.7	3.2	4.2	4.4	4.9	2.7	6.3	2.9	4.5	3.8
29-33	Machinery and equipment NEC;Electrical and optical equipment	5.0	5.6	3.1	8.9	4.9	9.9	5.7	7.4	10.4	6.1	4.2	6.4
34-37	Transport equipment and manufacturing NEC	1.3	4.6	2.7	6.2	5.2	5.3	3.3	1.4	10.2	1.7	2.5	4.5
40-41	Electricity; gas and water distribution	1.0	0.6	0.8	1.5	n.a.	2.6	0.4	1.5	n.a.	0.4	0.3	0.8
	Service sector(1), total	1.2	3.0	n.a.	1.3	2.1	1.6	3.0	2.4	3.8	4.0	2.5	2.7
	Size-class												
10-49	Small	0.9	3.1	n.a.	0.8	6.0	2.4	2.8	3.6	1.1	6.9	2.2	2.9
50-249	Medium-sized	2.8	2.5	n.a.	1.0	1.2	2.4	3.9	3.0	6.1	2.7	1.2	2.3
250 +	Large	1.1	3.0	n.a.	1.5	2.9	1.3	2.7	1.8	5.0	3.7	3.3	2.8
	NACE												
60-62, 64.2	Transport and telecommunications	0.7	1.7	n.a.	0.9	2.7	1.2	2.1	1.7	1.9	3.4	1.3	1.8
72, 74.2	Computer and related activities;Engineering services	2.2	5.1	n.a.	2.0	1.7	1.9	4.9	4.4	8.1	5.3	5.9	4.4

Table 6. Turnover of new and improved products in manufacturing by country, NACE and size-class. Percentage of total turnover

	BREAKDOWN	B(2)	D	E	F	IRL	NL(3)	A	FIN	S	UK	NOR	TOTAL
	Total	14	43	27	21	32	25	31	25	31	23	20	31
	Size-class												
20-49	Small	7	30	9	8	21	15	29	6	11	14	8	15
50-249	Medium sized	10	31	16	14	26	20	20	13	22	21	16	22
250 +	Large	16	47	37	25	43	28	37	28	34	25	26	35
	NACE												
15-19	Food products; beverages and tobacco;Textiles and leather	8	27	15	8	12	20	23	11	16	16	14	17
20-22	Wood;pulp and paper;publishing	5	16	13	12	20	15	26	10	16	18	6	15
23-26	Coke;chemicals;rubber and plastic;other non-metallic minerals	15	38	26	20	25	29	25	19	19	19	24	26
27-28	Basic metals and fabricated metal products	10	24	17	13	26	14	28	12	19	22	23	20
29-33	Machinery and equipment NEC;Electrical and optical equipment	32	54	42	36	69	40	47	54	51	44	37	49
34-37	Transport equipment and manufacturing NEC	14	62	46	28	22	28	38	27	39	19	21	39

n.a. : Non available
(1) : Excluding Wholesale trade and Commission trade (NACE 51) and Financial inter-mediation (NACE 65-67)
(2) : Preliminary results
(3) : in NL, medium-sized is defined as 50 to 199 and large as more than 200 employees.

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The second Community Innovation Survey (CIS2) was launched in the EEA Member States in 1997/1998. The first Community Innovation Survey was done for 1992. In general, the results from the two surveys are not directly comparable. All the participating countries have agreed on a common set of methodology and a core questionnaire aimed at providing comparable, harmonised and representative data on a pan-European scale. The survey is based on the Oslo-manual. In general, it is either the National Statistical Institute or a Ministry that is directly responsible for the survey at the national level.

This Statistics in Focus presents preliminary results for Belgium, Germany, Spain, France, Ireland, Luxembourg, Netherlands, Austria, Finland, Sweden, United Kingdom and Norway. The data for Norway refers to 1997, for the other countries the reference year is 1996. Final results for all participating countries are planned to be published in 3rd quarter 1999. The results can deviate from national published results, mainly due to different target population.

The target population

The statistical unit is the enterprise.

The following economic activities have been included in the target population: all manufacturing industries, electricity, gas and water supply, wholesale trade, transport, telecommunications, financial intermediation, computer and related activities and engineering services. In Spain the survey was only done for manufacturing industry.

The cut off point for inclusion in the target population is 20 employees in the manufacturing sector and 10 employees in the service sector. The sampling frames are business registers with as good quality as possible. Official statistical business register have been used whenever available.

The Survey method

A combination of sampling and census has been used; census down to a certain threshold of employees depending upon the country's enterprise population, and sampling for the rest. The samples have been selected by using a simple random selection in each stratum (defined by size class according to number of employees and economic activity based on NACE Revision 1 at 2-digits level). A full census is applied if the total number of enterprises in the frame population in a particular stratum is less than 5.

The results are based on answers from 33 700 enterprises, thus yielding a response rate of about 57%. Nationally the response rate varies from 24% to over 90%.

The results presented are grossed-up figures for the whole population. The weighting factors are based on shares between the numbers of enterprises in the realised sample and total number of enterprises in each stratum of the frame population (combined non response correction and weighting).

A non-response analysis has been carried out whenever the national response rate is below 70%. In these cases the results of the non-response analysis is used in the calculation of weighting factors.

DEFINITIONS

Technological innovations
comprise implemented technologically new products and processes and significant technological improvements in products and processes. It requires an objective improvement in the performance of a product or in the way in which it is produced or delivered. An innovation has been **implemented,** if it has been introduced on the market (product innovation) or used within a production process (process innovation). The product or process should be **new (or significantly improved) to the enterprise** but does not necessarily have to be new to the enterprise's market.

Innovating enterprise
is an enterprise who has introduced new or improved products on the market or new or improved processes. Enterprises can have innovation activity without introducing an innovation on the market (it has either unsuccessful or not yet completed projects to develop or introduce).

Innovation intensity
is defined as the innovation expenditure as percentage of turnover.

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Payment on receipt of invoice, preferably by:
❒ Bank transfer
❒ Visa ❒ Eurocard
Card No: _____ Expires on: ____/____
Please confirm your intra-Community VAT number:
If no number in entered, VAT will be automatically applied. Subsequent reimbursement will not be possible.
_____