

# Community Innovation Survey

- Sectorial Innovation performance -

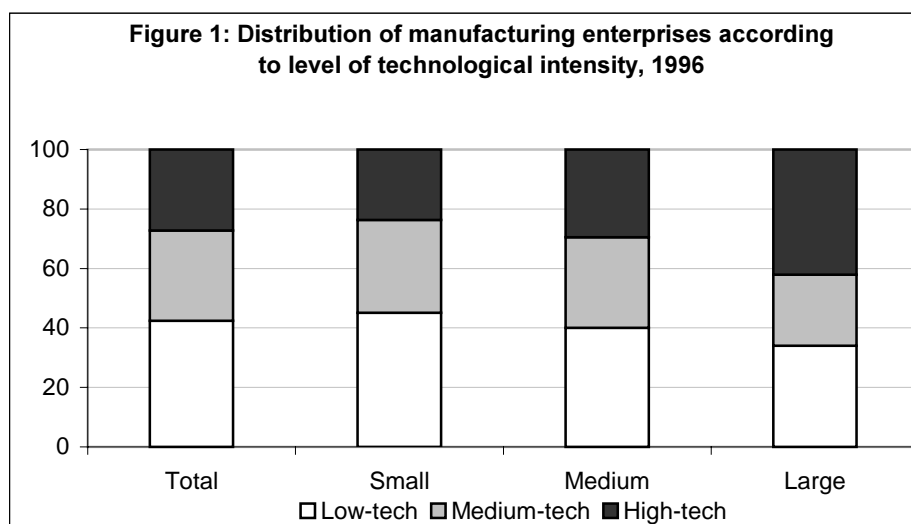
Frank FOYN

## High-tech firms

High-tech firms are often associated with technological innovation, gain in market share and creation of new product markets. They are also frequently related to high value-added production and success in global markets. Furthermore, industrial R&D performed by these firms also have spill-over effects that can be used by other sectors, generating new products and processes that lead to productivity gains, business expansions and the creation of high-wage jobs.

The breakdown of EU enterprises with more than 20 employees according to the level of technology<sup>1</sup> shows that the low-tech sector constitutes the bulk of firms, with a share of 43%; 27% of manufacturing enterprises are classified in the high-tech sector while the remaining 30% is made up of medium-tech sector. An approach by size class, however, reveals that this picture is not maintained throughout all classes. Small enterprises are quite close to the EU average, consisting mainly of low-tech firms (45%) and with only 24% of enterprises in the high-tech sector. In contrast, 34% of the large companies are in the low-tech and 42% are high-tech firms.

Figure 1: Distribution of manufacturing enterprises according to level of technological intensity, 1996



According to country data (see Table 4), Portugal and Spain have the lowest share of high-tech enterprises, with respectively 13% and 19%. On the other end are Sweden and Finland with the highest proportion of enterprises in the high-tech sectors, 34% and 35%.

<sup>1</sup> See definition in Methodological note, p.7.

Statistics  
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R&D STATISTICS

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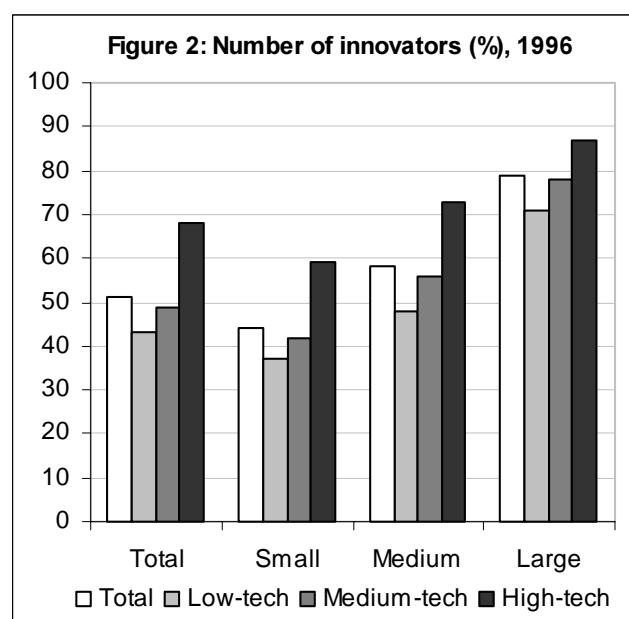
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## Innovating enterprises

Results from the second Community Innovation Survey show that 68% of enterprises in the high-tech sector have commercialised products that are technologically new or significantly improved to the firm or have introduced a new technological process in their production system. The comparable result is 43% for the low-tech sector, while the medium-tech sector is in between with 49% of innovators. In general, the share of innovating firms is higher, the higher the branch's level of technology. This pattern is the same throughout all the size classes, as illustrated in Figure 2. The figure also shows that the propensity to innovate increases with the size of the enterprise.

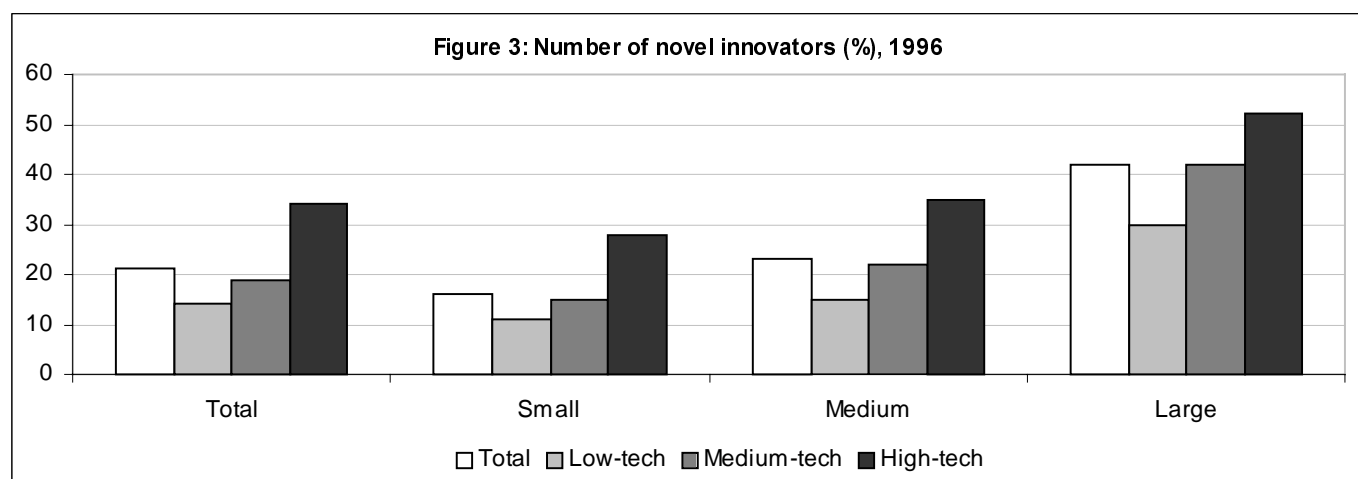
An important finding is, nevertheless, that the share of innovating enterprises in the low-tech sector is by no means negligible. In this category, in fact, over a third of small enterprises are innovators, almost every second one for medium-sized and 7 out of 10 of large enterprises have successfully introduced an innovation on the market.



## Novel innovators

On average, 21% of European enterprises have introduced on the market products that are new or significantly improved, not only to the enterprise, but also to the enterprise's market (novel innovators). There is however a large discrepancy across the three different sectors of technology level. 14% of low-tech enterprises are novel innovators, but the share is over two times higher for the high-tech sector: 34%. Figure 3 shows the same pattern as for all innovators; the proportion of novel innovators increases both with the level of technological intensity and with size. In this respect, the share of novel innovators varies between 30% and 52% for large firms against 11% to 28% for small firms.

At the country level, the Netherlands, as shown in Table 6, exhibits the highest share of novel innovators in the high-tech sector (44%), followed by Italy. At the opposite end are Portugal and Belgium with respectively 15% and 22%. As for the low-tech sector, Denmark is well above the EU average; more than a quarter of the enterprises have introduced a product that is new to the enterprise market. This contrasts with Spain and Portugal where respectively 6% and 4% of the low-tech enterprises are characterised as novel innovators.



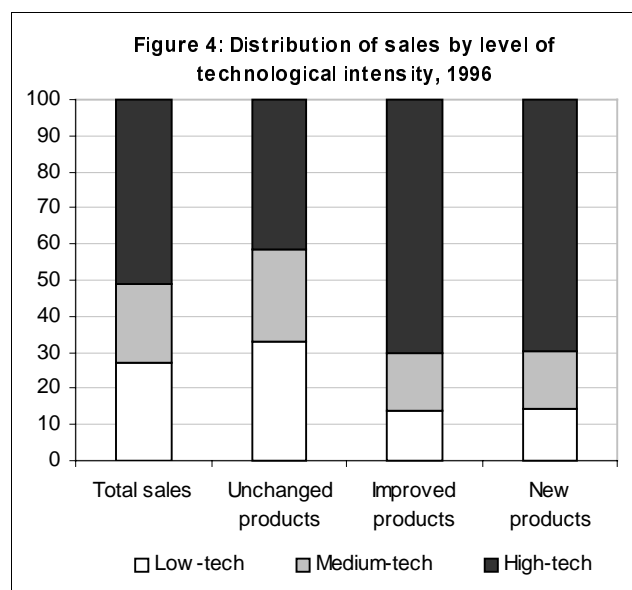
## Turnover

Slightly more than half of the turnover in the manufacturing sector result from enterprises in the high-tech sector (Figure 4). This represents a relatively high share since these enterprises represent only 27% of the total number of firms. However, as shown in Figure 1, the proportion of high-tech firms is high in large firms and low in small firms; large enterprises contribute to a much larger share of turnover than small ones.

Dividing the total sales into turnover due to unchanged, improved and new products reveals that high-tech is the dominating sector for all three categories. The most striking feature is, however, that the share of the high-tech sector in new and improved (innovative) products is higher than their overall share in total output, and lower for unchanged products.

The dominant position of the high-tech sector in the innovation process is also illustrated in Table 7. The share in turnover of innovative products, on average, amounts to 33%; 45% for the high-tech sector compared to 17% in the low-tech sector.

German and Irish high-tech enterprises have a higher share than average of innovative products in their turnover, respectively 57% and 51%. In contrast, only 18% of Belgium high-tech turnover is due to products that are new or improved to the firm.

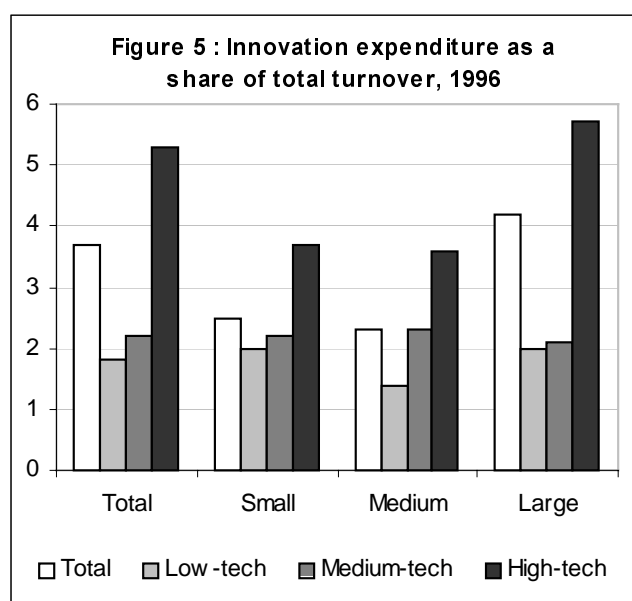


Novel products, i.e. products new to the enterprise's market, represented 8% of total turnover for the high-tech sector as against 4% in the low-tech (see Table 8). In Germany, the share is much lower, 4% in both sectors; this contrasts with the previous picture on innovative sales. On the other hand, over 20% of the turnover of Portuguese and Italian enterprises in the high-tech sector comes from novel products.

## Innovation expenditure

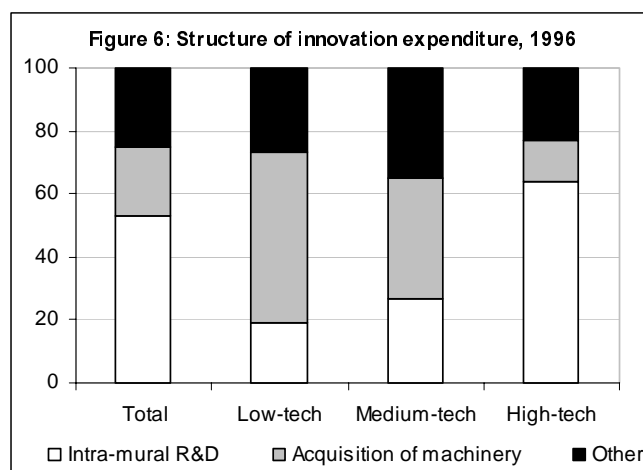
High-tech enterprises have been spending more on innovation activities, as percentage of their total turnover, than enterprises in low- or medium-tech sector. Whereas the total innovation expenditure represented 5.3% of their turnover in the high-tech sector, the two other sectors have been devoting much less financial resources on developing innovations, respectively 1.8% and 2.2%. Country-wise, the difference between the high- and low-tech sectors can be even larger, such as in Sweden contrasting with countries like the UK or Portugal (see Table 9).

On average, the higher the level of technological intensity, the higher is the spending on innovation activities. This feature is true throughout all the size bands. In this respect, it has to be mentioned that large high-tech innovators have a much higher level of innovation expenditure than small- and medium-sized ones.



There is a large variation in the structure of innovation expenditures across the different levels of technological intensity. High-tech sectors invest more on internal creative research to back up their innovations, while low-tech enterprises rely much more on the acquisition of machinery and equipment.

On average, intra-mural R&D represents some 53% of the total innovation expenditures, as much as 64% in high-tech, but in low-tech it accounts for only 19%. In contrast, more than half of the spending on innovation activities is used for the acquisition of machinery and equipment in the low-tech sector, whereas this expenditure represented only 13% of the high-tech spending on innovation.



## Turnover of new and improved products for the firm

Table 1 (first part) shows that, on average, 1% of product innovators with the highest turnover in new and improved products represent 55% of the total turnover of innovative products in the manufacturing sector.

Broken down by NACE the concentration is highest in the Transport equipment (72%), closely followed by the Electrical and optical equipment sector (67%). This means that 1% of product innovators contribute to more than two thirds of sales of new or improved products in these two sectors. On the other hand, enterprises in the Non-Elsewhere Comprised and recycling activities are the least concentrated (22%).

On average, 32% of the turnover of manufacturers is due to new or improved products. Focussing on the 1% of manufacturers with the highest innovative

turnover reveals that 55% of their sales comes from products that are new or improved to the enterprise (see second part of Table 1). Regarding the remaining product innovating firms (smallest 99% of enterprises) the share of turnover coming from innovative products is much less: 21%.

Contrasting the largest 1% with the smallest 99% shows that the most heterogeneous sector is Textile and leather. Among the 1% largest product innovators the share of new and improved products is 88%. On the other hand the vast majority of enterprises in this sector has low share of innovative products, 15%. That is the reason why the 1% largest innovators make 25% of the total in this sector, much less than for other manufacturing.

Table 1: Concentration of new and improved products	Concentration of new and improved products within sector <sup>1</sup>	Share of new or improved products in total turnover		
		All product innovators	Largest 1% of product innovators	Smallest 99% of product innovators
Total Manufacturing	55	32	55	21
Food, beverages & tobacco	34	17	41	13
Textile & leather	25	18	88	15
Wood, pulp & printing	33	15	42	11
Coke & chemicals	44	27	47	20
Rubber & other non-metallic	41	27	56	20
Basic & fabricated metals	41	16	20	14
Machinery & equipment	39	37	44	33
Electrical & optical equipment	67	52	72	33
Transport equipment	72	54	65	37
NEC & recycling	22	29	55	25

<sup>1</sup> Share of the group of 1% of enterprises with the highest turnover of new and significantly improved products in total turnover of new and significantly improved products of the sector

## Turnover of new and improved products for the market

The largest 1% of novel innovators according to turnover from novel products account for 46% of the total turnover due to products that are new or improved to the enterprise market (Table 2). Across the different NACE classes, this share varies from a minimum of 19% for NEC & recycling and a maximum of 64% for Electrical & optical equipment.

There is large difference between the largest 1% of enterprises compared to the 99% smallest. On average, novel products represent 4% of total turnover for the latter but 24% for the former,

compared to an overall average of 7% for all innovators.

On a sector-based level, the difference can be even larger. As in the case of innovative products, the largest 1% of novel innovators in Textile and leather manufacturers are highly innovative; 43% of their turnover comes from novel products and they rank first among the other manufacturing sectors. The picture is the same for novel innovators in the Wood, pulp and printing branch. This contrast with the sector averages where they rank among the last.

	Concentration of turnover due to novel products within sectors <sup>1</sup>	Share of novel products in total turnover		
		All novel innovators	Largest 1% of novel innovators	Smallest 99% of novel innovators
Total Manufacturing	46	7	24	4
Food, beverages & tobacco	35	4	21	3
Textile & leather	26	5	43	4
Wood, pulp & printing	37	3	43	2
Coke & chemicals	49	8	33	4
Rubber & other non-metallic	37	7	17	5
Basic & fabricated metals	35	3	19	2
Machinery & equipment	29	8	16	6
Electrical & optical equipment	64	12	19	8
Transport equipment	48	7	41	4
NEC & recycling	19	7	30	6

<sup>1</sup> Share of the group of 1% of enterprises with the highest turnover of novel products in total turnover of novel products of the sector

## Innovation expenditure

As shown in Table 3, on average, 55% of the total innovation expenditure is due to 1% of the largest enterprises according to innovation investment. As for the preceding two indicators, both Electrical & optical instrument and Transport equipment are highly concentrated while NEC & recycling and Textile & leather are the least concentrated.

The 1% of innovators devoting the highest expenditure on innovation activities reveals that the

Textile & leather industry together with Wood, pulp & printing have a small number of firms that spend as much, if not proportionately more, as those enterprises in Machinery & equipment and Transport equipment.

The ranking of the different NACE classes for the other 99% does not show any significant differences compared to all innovators, albeit for Machinery & equipment.

	Concentration of total innovation expenditure within sectors <sup>1</sup>	Innovation intensity		
		All innovators	Largest 1% of innovators	Smallest 99% of innovators
Total Manufacturing	55	3.7	7.3	2.3
Food, beverages & tobacco	37	1.6	3.5	1.2
Textile & leather	23	1.6	8.8	1.3
Wood, pulp & printing	43	2.5	9.8	1.6
Coke & chemicals	45	4.1	10.6	2.7
Rubber & other non-metallic	31	2.7	4.9	2.2
Basic & fabricated metals	52	2.1	2.9	1.6
Machinery & equipment	45	3.8	7.3	2.7
Electrical & optical equipment	71	8.4	11.6	5.1
Transport equipment	65	4.3	6.5	2.7
NEC & recycling	24	2.4	5.8	2.0

<sup>1</sup> Share of the group of 1% of enterprises with the highest innovation expenditure in total innovation expenditure of the sector

**Table 4: Relative distribution of total number of enterprises, manufacturing sector (%), 1996**

	EU	B	D	DK	E	F	I	IRL	L	NL	A	P	FIN	S	UK	EEA	NOR
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Low-tech	42	48	33	39	51	43	44	44	31	40	52	68	41	36	38	43	51
Medium-tech	30	31	34	28	30	32	30	24	43	32	28	19	24	30	29	30	29
High-tech	27	22	32	33	19	26	26	32	26	28	20	13	35	34	32	27	20

**Table 5: Number of innovators (%), 1996**

Total	51	34	69	71	29	43	48	73	42	62	67	26	36	54	59	51	48
Low-tech	43	28	64	66	20	36	41	65	26	55	66	21	29	44	52	43	43
Medium-tech	49	36	62	59	28	37	49	73	46	57	61	28	35	47	54	49	45
High-tech	68	47	80	85	53	62	59	86	53	79	81	49	46	71	71	68	66

**Table 6: Number of novel innovators (%), 1996**

Total	21	14	24	27	11	20	26	27	21	28	24	7	18	25	19	21	14
Low-tech	14	10	16	26	6	12	19	21	15	20	19	4	12	13	12	14	10
Medium-tech	19	15	19	27	9	18	26	24	15	24	24	10	15	27	16	19	12
High-tech	34	22	36	30	25	33	40	36	36	44	36	15	25	34	29	34	27

**Table 7: Turnover due to new or improved products as a share of total turnover (%), 1996**

Total	33	14	45	21	27	21	27	32	:	25	31	14	25	31	23	32	20
Low-tech	17	11	25	10	14	10	18	13	:	19	24	7	10	16	17	17	11
Medium-tech	23	10	24	22	25	17	31	30	:	20	29	4	17	19	20	23	21
High-tech	45	18	57	38	39	29	33	51	:	35	42	34	47	39	29	45	33

**Table 8: Turnover due to novel products as a share of total turnover (%), 1996**

Total	6	3	4	5	9	8	13	8	:	7	6	7	7	7	7	4	6
Low-tech	4	2	4	3	4	3	8	3	:	4	6	1	2	2	4	2	4
Medium-tech	6	2	3	5	10	9	11	16	:	11	4	1	5	3	6	5	6
High-tech	8	3	4	9	14	11	20	10	:	8	7	22	16	10	9	7	8

**Table 9: Total innovation expenditure as a share of total turnover (%), 1996**

Total	3.7	2.1	4.1	4.8	1.8	3.9	2.6	3.3	:	3.8	3.5	1.7	4.3	7.0	3.2	3.7	2.7
Low-tech	1.8	1.2	1.9	2.3	1.1	1.0	1.7	1.4	:	1.6	1.9	1.8	4.0	2.8	2.6	1.8	1.7
Medium-tech	2.2	2.5	2.3	5.9	1.4	1.8	2.2	3.5	:	1.8	3.2	1.0	1.1	2.3	2.3	2.2	1.8
High-tech	5.3	2.7	5.3	8.5	2.9	6.8	3.8	5.1	:	7.9	5.5	2.2	6.9	9.8	3.9	5.3	5.3

## ➤ 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 results for 14 EU countries and Norway. The data for Norway and Portugal refers to 1997, for the other countries the reference year is 1996. The results presented here can deviate from national published results, mainly due to different target population.

### THE TARGET POPULATION

The statistical unit is the enterprise.

Apart from the manufacturing sector, the following economic activities have been included in the target population: electricity, gas and water supply, wholesale trade, transport, telecommunications, financial intermediation, computer and related activities and engineering services.

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 39 500 enterprises, thus yielding a response rate of 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 number of enterprises in the realised sample and total number of enterprises in the population for 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 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 following **size bands**, based on number of employees, have been used to characterise enterprises.

	Manufacturing	Service
Small	20 to 49	10 to 49
Medium	50 to 249	50 to 249
Large	250 +	250 +

The level of technological intensity as used in this SIF is based on the OECD "Revision of the high-technology sector and product classification". The OECD "high-tech" and "medium high-tech" have been merged together, and the "medium low-tech" has been named "medium-tech".

High-tech*	<i>Aerospace, computers &amp; office machinery, electronics-communications, pharmaceuticals, scientific instruments, motor vehicles, electrical machinery, chemicals (except pharmaceuticals), other transport equipment (except aerospace and shipbuilding), non-electrical machinery</i>
Medium-tech	Rubber and plastic products, shipbuilding, other manufacturing (except furniture), non-ferrous metals, fabricated metal products, petroleum refining, ferrous metals
Low-tech	Paper printing, textiles & clothing, food, beverages & tobacco, wood, furniture

\*: The sectors in italics form part of the OECD high-tech sector while the remaining are part of the medium-high tech sector.

The concept of concentration as used in tables 1 to 3 refers to the share of 1% of the enterprises with the highest values for the particular indicator.

# Further information:

## ➤ Databases

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