

Trade in royalties and licence fees: a key means for technology diffusion

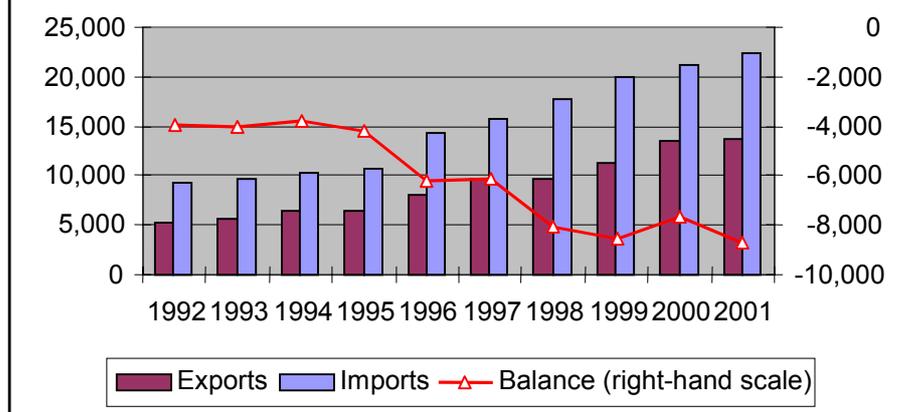
Luis Biedma

Extra-EU trade in *royalties and licence fees* increased by 4% in 2001, after growing by 11% and 14% in 2000 and 1999, respectively. This slowdown was consistent with that experienced in extra-EU trade in total commercial services¹, which expanded by 5% in 2001, 13 percentage points less than in 2000. However, the deceleration of *royalties and licence fees* trade growth was chiefly due to the stagnation of exports, rather than imports.

The slowing down of trade in *royalties and licence fees* was more marked in the main EU partners in 2001. Thus, trade in this type of services grew by 3% in the USA in 2001, whilst the growth rate in 2000 was 29%. Similarly, Japan's imports and exports of *royalties and licence fees* went up by 5% in 2001, which contrasts with the 36% increase recorded in 2000.

The share of EU *royalties and licence fees* exports in GDP increased notably over the period 1992-2001, passing from 0.09% to 0.15%. Nevertheless, there were significant disparities among Member States. Highly specialised countries in the provision of these services, such as Sweden, United Kingdom, Finland and the Netherlands, recorded shares of *royalties and licence fees* exports² in GDP above 0.40%, whereas five Member States showed shares below 0.10%.

Graph 1: Extra-EU trade in royalties and licence fees
Mio. EUR (ECU up to end 1998)



Statistics in focus

ECONOMY AND FINANCE

THEME 2 – 59/2003

BALANCE OF PAYMENTS

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¹ Commercial services comprises all services except government services, n.i.e.
² Extra-EU + Intra-EU exports.

Royalties and licence fees: a knowledge-based service

It is generally accepted that knowledge has a major influence on economic growth and that investment in the generation of knowledge, capacity for innovation and the exploitation of new ideas are key requirements of success³. This was also recognised at the Lisbon European Council, in March 2000, which represents the Union's first major attempt to come to grips with the transition to a knowledge-based economy⁴.

But for investment in knowledge to take place, an appropriate legal framework must be in force. Thus, there must be effective property rights such as patents, copyrights, trademarks, franchises..., which protect and foster innovation. These rights as well as other intangible assets can be traded as any good or service, and therefore, knowledge is tradable.

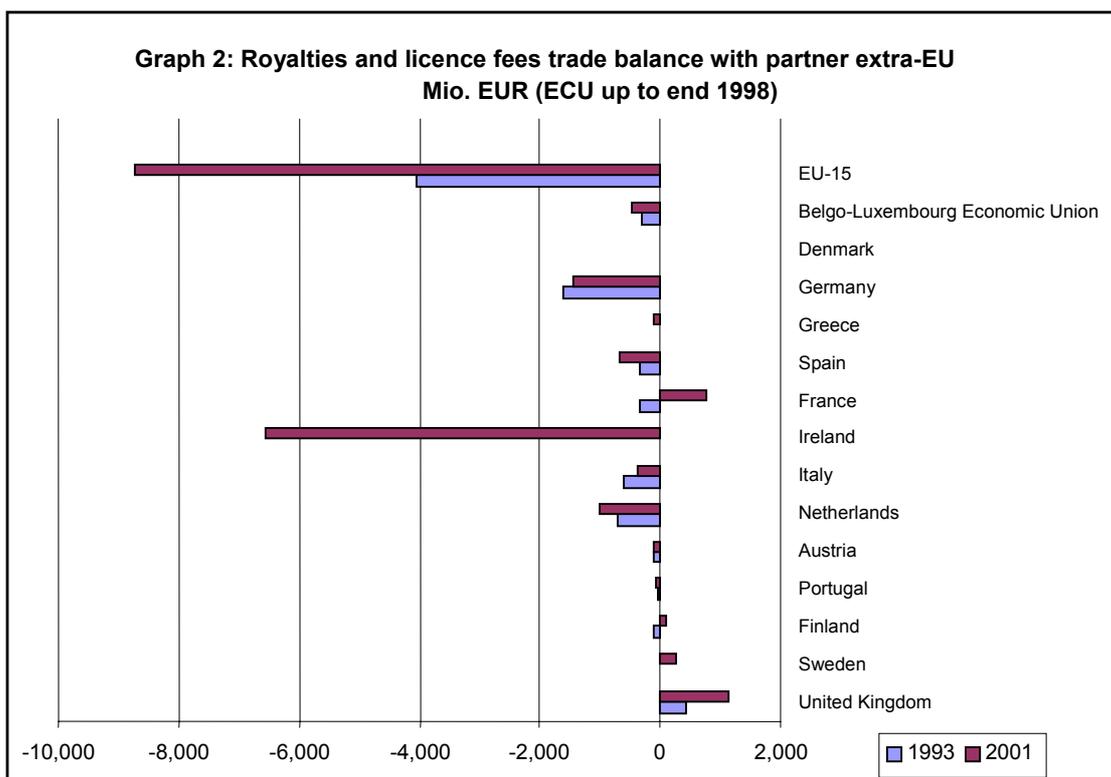
Royalties and licence fees is a service item of Balance of Payments, which covers the exchange of payments and receipts between residents and non-residents for the authorised use of intangible, non-produced, non-financial assets and proprietary rights (such as patents, copyrights, trademarks, industrial processes, franchises...) and with the use, through licensing agreements, of produced originals or prototypes (such as manuscripts and films).

Royalties and licence fees and international technology transfers

Royalties and licence fees is a key item of the so-called Technology Balance of Payments⁵, which measures international technology transfers. It should be noted that payments and receipts related to the above item concern production-ready technologies⁶, unlike Research & Development expenditure.

Countries can have access to technology through investment on R&D, but also through imports of *royalties and licence fees*; in this case innovation takes place abroad and somebody other than the producer, located in another country, can exploit the results. This could be interpreted as a model with leaders and followers, where some countries may benefit from others' findings by paying the corresponding *royalties and licence fees*. However, when talking about technology transfers, there cannot be real followers, since it is mandatory to identify the best practices in advance and have the required know-how to exploit the technology effectively.

EU: net importer of royalties and licence fees



3 UK Department of Trade and Industry. *The 1998 Competitiveness White Paper*.

4 European Commission – Internal Market. *Special feature - No 21 (May 2000)*.

5 See methodological notes at the end of the document.

6 OECD – Directorate for Science, Technology and Industry. *Indicators of Economic Globalisation*. March 2003.

Graph 2 shows that the EU recorded a deficit in *royalties and licence fees* with partner extra-EU in 2001, which has doubled since 1993. The deficit amounted to EUR 4.0 bn in 1993 and reached EUR 8.7 bn in 2001. The main contribution to the EU deficit comes from Ireland, whose trade balance with partner extra-EU stood at EUR -6.6 bn in 2001, accounting for three quarters of the total EU deficit. However, the cause of Ireland's large deficit lies in the presence of foreign affiliates (mainly from the USA) in Irish territory, since they receive significant technology transfers from parent companies. In Balance of Payments, payments and receipts for technology transfers, even within the same company, are recorded as imports or exports, respectively.

Germany's EUR 1.4 bn deficit also had a significant influence on the overall extra-EU trade balance in 2001. In contrast to this, the United Kingdom's transactions with partner extra-EU in *royalties and licence fees* had a EUR 1.1 bn surplus in 2001, nearly three times larger than in 1993. It is notable that France recorded continuous deficits with partner extra-EU over the period 1992-1999, although they decreased after 1996, and that the surplus attained in 2000 was exceeded in 2001.

A deficit in *royalties and licence fees* can be read in various ways as the interpretation of this item differs from that of other *services* or *goods*. On the one hand, a deficit reflects that the country is not competitive in the production of this service, and for this reason, imports exceed exports. On the other hand, a deficit in *royalties and licence fees* does not inevitably denote low competitiveness, since it could be the consequence of a rise in the level of imports of foreign technology. This increase in imports could simply indicate that resident enterprises are willing to invest more than before in technology, precisely to become more competitive in their field. Moreover, a deficit derived from a high level of imports may have positive connotations, such as permeability to foreign technology and adaptability to new scenarios.

EU deficit with the USA remains stable since 1999

Table 1, below, shows that the EU's EUR 8.7 bn deficit with the rest of the world in 2001 was mainly due to the bilateral deficit contracted with the USA, amounting to EUR 10.2 bn. However, this bilateral deficit remained stable since 1999, the year in which it grew substantially. The largest EU bilateral surplus in 2001 was attained with Asia excluding Japan, EUR 1.3 bn, EUR 136 Mio. less than in 2000. In general, the EU bilateral surplus with the selected partners below tended to diminish in 2001. Only the EU surplus with Japan expanded during this period, confirming the tendency since 1998.

Table 1: EU trade balance in royalties and licence fees with selected partners
Mio. EUR (ECU up to end 1998)

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Extra-EU	-3,953	-4,047	-3,784	-4,165	-6,171	-6,131	-8,058	-8,576	-7,625	-8,716
EFTA (1)	-737	-697	-819	-847	-1,292	-970	-1,369	-829	-652	-1,000
Other European Countries (2)	33	68	97	92	2	166	-115	228	414	127
Africa	124	144	151	157	39	84	-27	215	303	202
America excluding USA	205	167	157	131	-56	277	-84	258	568	295
USA	-4,533	-4,769	-4,309	-4,447	-5,348	-6,292	-6,435	-10,292	-10,181	-10,182
Asia excluding Japan	269	323	300	329	286	415	-31	1,335	1,436	1,300
Japan	347	437	408	274	100	59	-97	206	242	328
Oceania and Polar Regions	109	112	130	152	116	181	176	235	191	165
Other	230	168	101	-6	-18	-51	-76	68	54	49

(1) European Free Trade Association; it includes Iceland, Liechtenstein, Norway and Switzerland.

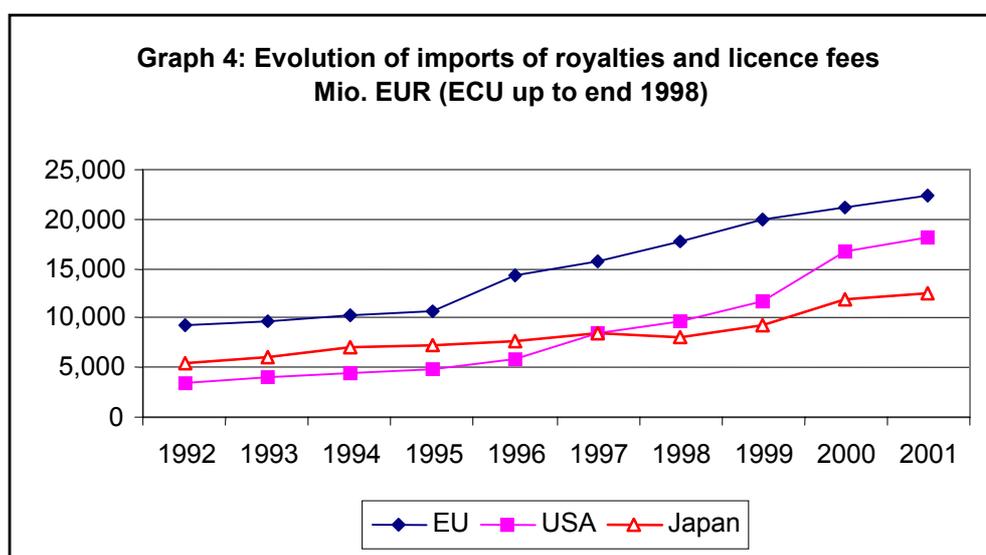
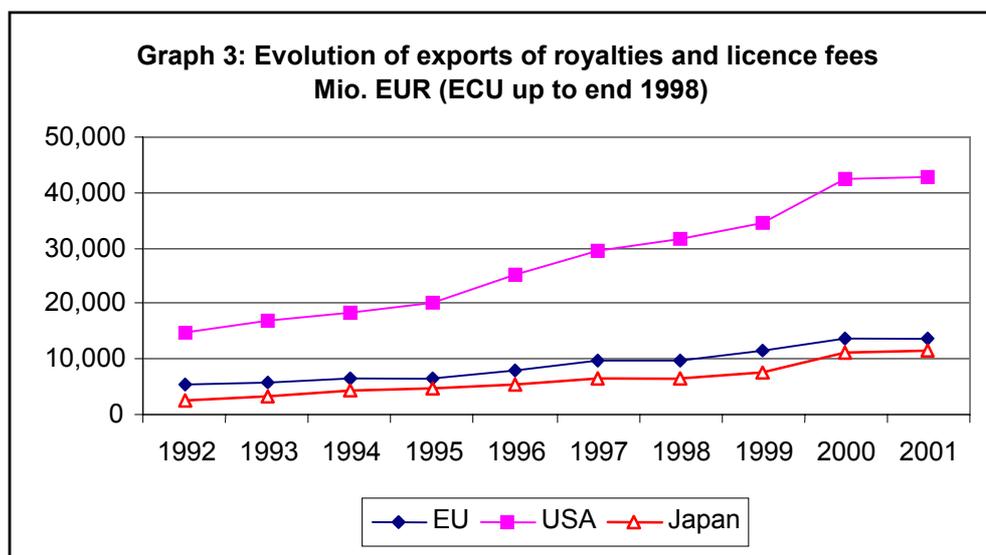
(2) European countries other than EU and EFTA countries.

EU exports of royalties and licence fees slackened in 2001

Extra-EU exchanges of *royalties and licence fees* went up by 4% in 2001 to EUR 36.1 bn. This was the lowest growth rate since 1996, when imports and exports grew by 30%. Exchanges of *royalties and licence fees* increased by 11% and 14% in 2000 and 1999, respectively. Nevertheless, this slowing down in 2001 was due to the slackening of exports, which only grew by 1% to EUR 13.7 bn, standing in stark contrast to the 20% growth rate recorded in 2000. On the contrary, imports grew by 6% in 2001, at exactly the same pace as in 2000, amounting to EUR 22.4 bn. In spite of this, this evolution of imports is sluggish if we compare it with the double-digit growth rates attained over the period 1996-1999.

The slowing down seen in exchanges of *royalties and licence fees* was consistent with the general deceleration undergone by *commercial services*, which expanded by 5% in 2001 after growing by 18% during the previous year. Nevertheless, the situation was more severe in the USA and Japan, where trade in *royalties and licence fees* suffered a sudden braking⁷ in 2001 in relation to the previous year.

Imports and exports of *royalties and licence fees* rose by 3% in the USA in 2001 to EUR 60.9 bn, which contrasts with the 29% growth rate accomplished in 2000. However, this service item performed better than the aggregate *commercial services*, whose transactions contracted by 2% in 2001. The situation in Japan was similar, with imports and exports of *royalties and licence fees* increasing by 5% to EUR 24.1 bn in 2001, after having boosted by 36% in 2000. Trade in *commercial services* also went down by 4% in 2001.



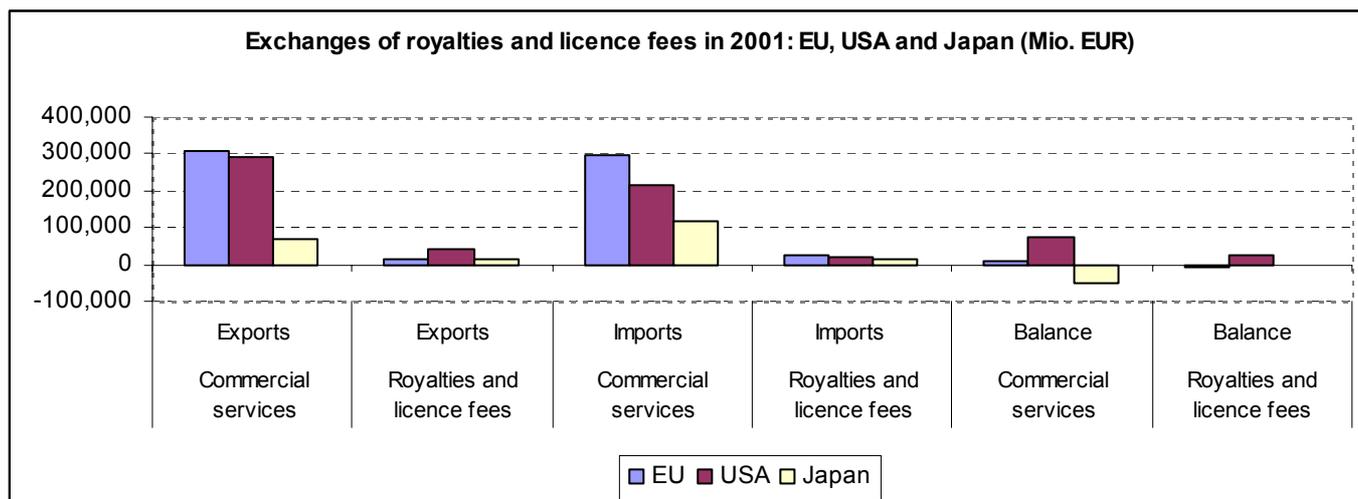
Graph 3 above shows that the USA is leader in the provision of *royalties and licence fees* to the rest of the world, with exports amounting to 42.8 bn in 2001. Indeed, the USA exported about three times more *royalties and licence fees* than the EU in 2001, when EU exports amounted to EUR 13.7 bn. The gap in the volume of exports between the USA on the one hand, and the EU and Japan on the other hand, increased over time. In fact, US exports were always about three times higher than EU exports during the period 1992-2001, but at the same time, both EU and US exports experienced nearly a three-fold increase over the same period.

⁷ The data presented in this issue of *Statistics in Focus* are denominated in euro, and consequently, variations in the exchange rate of the euro against the US dollar and the Japanese yen between two different periods are reflected in the evolution of transactions of the USA and Japan.

The EU imported *royalties and licence fees* totalling EUR 22.4 bn in 2001, which represents 6% more than in 2000; this amount is 2.5 times higher than in 1992, when extra-EU imports were valued at ECU 9.2 bn. Graph 4 shows that EU imports of *royalties and licence fees* topped those of the USA and Japan by 25% and 80%, respectively, in 2001.

Share of royalties and licence fees in commercial services in the EU, the USA and Japan

Graph 5 illustrates that the EU was leader in the provision of *commercial services* to the rest of the world in 2001 with EUR 306.7 bn. However, exports of *royalties and licence fees* amounted to EUR 13.7 bn, representing 4% of all exports of *commercial services*. In 2001, the USA exported *commercial services* worth EUR 289.6 bn but exports of *royalties and licence fees* totalled EUR 42.8 bn, which gives 15% of total exports of *commercial services*. Nevertheless, the highest share of exports of *royalties and licence fees* in exports of *commercial services* was accounted for by Japan with 16%.



The share of imports of *royalties and licence fees* in total imports of *commercial services* in 2001 was 8% for the EU and the USA and 10% for Japan. Graph 5 shows that actually one third of the USA's surplus in *commercial services* was due to the balance (EUR 24.7 bn) attained in *royalties and licence fees*. The large US surplus in *royalties and licence fees* points towards significant transactions between parent companies and affiliates and some kind of dependency on US technology by other countries. As a matter of fact, the possibility of trading internationally *royalties and licence fees* has given rise to specialisation in this type of services in the USA and exploitation of its comparative advantage.

Disparities between Member States in the exporting of royalties and licence fees

The share of exports of *royalties and licence fees* in GDP is a good indicator of a country's degree of specialisation in the provision of this type of services. Cross-country comparisons of the level of *royalties and licence fees* exports may not be very revealing if the sizes of the economies are not taken into consideration. For this reason, calculating this share is a way to relate the volume of exports to the size of a given economy, and therefore, obtain a better picture of the relative importance of this service item.

Table 2 illustrates that there are considerable differences between the EU Member States. In 2001, Sweden had the highest share with 0.66%. The United Kingdom ranked second with 0.57%, Finland third with 0.48% and the Netherlands fourth with 0.45%.

At the other end of the spectrum were Greece and Portugal with 0.01% and 0.02%, respectively, followed by Italy with 0.04%, Spain with 0.06% and Austria with 0.07%. Two of the largest EU economies, France and Germany, showed shares of 0.20% and 0.17%, whereas BLEU and Ireland recorded considerably high shares with 0.36% and 0.34%, respectively.

Table 2: Share of exports¹ of royalties and licence fees in GDP

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
European Union	0.09%	0.09%	0.10%	0.10%	0.12%	0.13%	0.13%	0.14%	0.16%	0.15%
BLEU ²	0.36%	0.43%	0.43%	0.20%	0.23%	0.25%	0.26%	0.29%	0.31%	0.36%
Denmark	:	:	:	:	:	:	:	:	:	:
Germany	0.10%	0.11%	0.11%	0.13%	0.14%	0.15%	0.16%	0.15%	0.15%	0.17%
Greece	:	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%	0.01%	0.00%	0.01%
Spain	0.02%	0.03%	0.04%	0.03%	0.04%	0.04%	0.04%	0.06%	0.08%	0.06%
France	0.12%	0.11%	0.11%	0.12%	0.12%	0.15%	0.16%	0.14%	0.18%	0.20%
Ireland	0.07%	0.13%	0.16%	0.20%	0.14%	0.15%	0.20%	0.43%	0.54%	0.34%
Italy	0.04%	0.05%	0.06%	0.08%	0.06%	0.10%	0.06%	0.05%	0.05%	0.04%
Netherlands	0.48%	0.59%	0.63%	0.57%	0.59%	0.58%	0.64%	0.61%	0.58%	0.45%
Austria	0.06%	0.06%	0.06%	0.06%	0.08%	0.09%	0.05%	0.06%	0.09%	0.07%
Portugal	0.02%	0.04%	0.03%	0.02%	0.02%	0.02%	0.04%	0.02%	0.03%	0.02%
Finland	0.06%	0.10%	0.08%	0.05%	0.05%	0.08%	0.08%	0.51%	0.74%	0.48%
Sweden	0.25%	0.38%	0.54%	0.32%	0.33%	0.38%	0.46%	0.56%	0.53%	0.66%
United Kingdom	0.33%	0.35%	0.38%	0.41%	0.56%	0.51%	0.52%	0.55%	0.55%	0.57%
United States	0.31%	0.30%	0.31%	0.36%	0.41%	0.40%	0.40%	0.39%	0.40%	0.38%
Japan	0.08%	0.09%	0.11%	0.11%	0.14%	0.17%	0.19%	0.18%	0.21%	0.25%

¹ Partner extra-EU for the EU and partner world for the EU Member States, the USA and Japan

² Belgo-Luxembourg Economic Union

Table 2 shows that EU exports of *royalties and licence fees* became increasingly important over time. Thus, these exports represented 0.09% of the EU GDP in 1992, while they rose to 0.15% of the GDP in 2001. The Member States contributing most to this increase during this period were Germany, France, Ireland, Finland, Sweden and the United Kingdom. However, over the period 1992-2001 some Member States did not increase their share of exports in GDP or did it modestly. This was the case for BLEU, Italy, Portugal, Greece and Austria.

The relative importance of EU *royalties and licence fees* exports was substantially lower than for its main partners. US exports of *royalties and licence fees* to the rest of the world amounted to 0.38% of the USA GDP in 2001, which reveals an increase of 7 basic points since 1992. Nevertheless, the progressive specialisation of Japan in the exports of this service was more remarkable; the share of *royalties and licence fees* in GDP passed from 0.08 in 1992 to 0.25 in 2001.

Table 2 shows that the absolute increase in the share of *royalties and licence fees* exports in GDP in the EU and the USA over the period 1992-2001 was very similar (0.06 and 0.07) and subsequently, the gap between both economies in this respect remained stable. It is noteworthy that four Member States (Sweden, United Kingdom, Finland and the Netherlands) are highly specialised in the provision of *royalties and licence fees* services abroad and presented shares notably higher than those of the USA and Japan in 2001.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The data used in this issue of Statistics in Focus are from the Balance of Payments statistics. The balance of payments records all economic transactions between a country (i.e. its residents) and foreign countries or international organisations (i.e. the non-residents of that country) during a given period. As part of the balance of payments, the *current account* takes care of real resources and is divided into four basic components: *goods*, *services*, *income* and *current transfers*.

Goods cover general merchandise, non-monetary gold, goods for processing, repairs on goods and goods procured in ports by carriers. When calculating the balance of payments both exports and imports should be valued free on board (f.o.b.). **Services** are the second major category of the *current account*, and it is subdivided in three components: *transportation*, *travel* and *other services*. The item *other services* comprises the following sub-items: *communications services*; *construction services*; *insurance services*; *financial services*; *computer and information services*; *royalties and licence fees*; *other business services*; *personal, cultural and recreational services*; *government services*. **Income** contains two main items: *compensation of employees* and *investment income*. The former records wages, salaries and other benefits, in cash or in kind, earned by individuals for work performed for economic units whose place of residence is different from their own. *Investment income* covers income that a resident entity derives from the ownership of external financial assets (credit) and income non-residents derive from their financial assets invested in the compiling economy (debit). This includes interest and dividends on direct, portfolio and other investments. **Current transfers** consist of all transfers that are not transfers of capital. They directly affect the level of disposable income and should influence the consumption of *goods* and *services*.

The methodological framework used is that of the fifth edition of the International Monetary Fund (IMF) Balance of Payments manual.

The EU balance of payments is compiled by Eurostat in accordance with a methodology agreed with the European Central Bank (ECB) based on extra-EU transactions, i.e. by aggregating cross border transactions of EU residents vis-à-vis non-EU residents as reported by the 15 participating Member States. The balance of payments of the EU institutions is added to the EU aggregate.

Inclusion of *royalties and licence fees* under *services*, rather than under *income*, is in accordance with the SNA treatment of such items as payments for production of *services* for intermediate consumption or receipts from sales of output used as intermediate inputs.

Technology balance of payments⁸

Technology receipts and payments constitute the main form of disembodied technology diffusion. Trade in technology comprises four main categories:

- Transfer of techniques (through patents and licences, disclosure of know-how).
- Transfer (sale, licensing, franchising) of designs, trademarks and patterns.
- Services with a technical content, including technical and engineering studies, as well as technical assistance.
- Industrial R&D.

The following operations should be excluded from technology balance of payments: commercial, financial, managerial and legal assistance; advertising, insurance, transport; films, recordings, material covered by copyright; design; software.

Further reading:

IMF, Balance of Payments Manual, fifth edition (BPM5), 1993.

United Nations, Manual on Statistics of international trade in services, 2002.

European Union international transactions, data 1991-2001, Eurostat, 2003. A CD-ROM with the geographical breakdown of the EU current account is part of this publication.

OECD Statistics on International Trade in Services 1992-2001, OECD, 2003.

⁸ OECD Science, Technology and Industry Scoreboard 2001 – Towards a knowledge-based economy.

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