

# Sources and resources for EU innovation

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The third round of the Community Innovation Survey (CIS3) provides data on, among other subjects, the sources and resources used by enterprises in their innovation activities. These are the main focus of this publication, which concentrates on an EU aggregate that has been created from the data for 12 Member States (excluding Ireland, Luxembourg and the United Kingdom for reasons of availability). When reference is made to the EU in the text, it is to this aggregate for the 12 Member States, rather than the EU as a whole.

The main objectives are:

- to explore the link between innovation and growth;
- to identify the main sources of innovation, including co-operation;
- to measure the extent of public funding, with respect to innovation;
- and to study human capital and innovation.

## 1. Growth and innovation

While there were fewer enterprises with innovation activity (201 000) than there were enterprises without such activity (256 000) in the EU in 2000, enterprises with innovation activity had a larger workforce (25 million employees against 10 million). These figures support the view that innovation is more frequently carried out among relatively large enterprises. Note that only enterprises with 10 or more employees were included in the target population of CIS3.

Employment growth was higher among enterprises with innovation activity as opposed to those without such activity. Indeed, this was the case in both industrial and service activities. A sectoral breakdown shows that in general employment grew somewhat faster in the services sector than in industry between 1998 and 2000. This observation was true across all types of innovator for which a complete set of data is available (see table 1).

*Table 1: Employment growth in the EU, by type of enterprise*

	Employees, 2000 (000)	Employee growth 1998 to 2000 (%)		
		All	Industry	Services
All enterprises	35 284	7	5	9
Enterprises with innovation activity	25 279	8	7	11
Successful	:	:	7	:
Product only	3 937	8	5	14
Process only	:	:	4	:
Product and process	17 746	9	8	11
On-going and/or abandoned	:	:	2	:
Enterprises without innovation activity	10 006	4	2	6

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THEME 9 – 5/2004

## Contents

1. Growth and innovation.....	1
2. Sources of innovation .....	2
3. Innovation co-operation .....	3
4. Intramural research and development (R&D).....	4
5. Innovation funding.....	5
6. Human resources for innovation .....	6



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## 2. Sources of innovation

Table 2: Main sources of information for innovation in the EU, by sector and by size-class, 1998-2000

	Industry					Services				
	Enterprises with innovation activity (absolute figures)	Proportion of enterprises with innovation activity indicating that selected sources were of high importance for new projects or implementing existing projects (%)				Enterprises with innovation activity (absolute figures)	Proportion of enterprises with innovation activity indicating that selected sources were of high importance for new projects or implementing existing projects (%)			
		All	Small	Medium	Large		All	Small	Medium	Large
Within the enterprise	47 633	37	32	40	70	28 638	40	37	41	69
Other enterprises within the enterprise group	8 776	7	3	10	28	9 622	13	9	23	38
Suppliers of equip., material, components or software	25 336	19	19	17	29	14 014	20	19	19	29
Clients or customers	34 465	27	22	32	51	22 079	31	32	25	37
Competitors and other enterprises from the same industry	13 801	11	9	13	21	9 978	14	14	13	22
Universities/higher education institutes	5 122	4	3	4	11	4 269	6	6	6	6
Government/non-profit research institutes	3 491	3	2	3	7	2 098	3	3	4	3
Conferences; meetings; journals	11 399	9	8	9	15	10 660	15	15	15	18
Fairs and exhibitions	22 697	17	17	18	20	9 956	14	15	9	10

Table 3: Main sources of information for innovation in the EU, by sector and by type of innovator, 1998-2000

	Industry						Services					
	Number of enterprises with innovation activity (absolute figures)	Proportion of enterprises with innovation activity indicating that selected sources were of high importance for new projects or implementing existing projects (%)					Number of enterprises with innovation activity (absolute figures)	Proportion of enterprises with innovation activity indicating that selected sources were of high importance for new projects or implementing existing projects (%)				
		All	Prod. only	Proc. only	Product and process	On-going and/or abandoned		All	Prod. only	Proc. only	Product and process	On-going and/or abandoned
Within the enterprise	47 633	37	47	31	35	32	28 638	40	47	:	34	:
Other enterprises within the enterprise group	8 776	7	8	7	6	6	9 622	13	14	:	13	:
Suppliers of equip., material, components or software	25 336	19	18	31	17	12	14 014	20	21	:	16	:
Clients or customers	34 465	27	40	18	25	21	22 079	31	37	:	28	:
Competitors and other enterprises from the same industry	13 801	11	16	8	9	11	9 978	14	15	:	13	:
Universities/higher education institutes	5 122	4	5	2	4	7	4 269	6	3	:	6	:
Government/non-profit research institutes	3 491	3	4	2	2	3	2 098	3	2	:	3	:
Conferences; meetings; journals	11 399	9	13	10	7	6	10 660	15	14	:	15	:
Fairs and exhibitions	22 697	17	24	21	14	11	9 956	14	16	:	12	:

### 3. Innovation co-operation

The CIS survey looked at whether or not enterprises with innovation activity actively participated with other enterprises or non-commercial institutions in joint R&D or other innovation projects. The definition of co-operation used in CIS3 does not imply that both partners derived immediate commercial benefit from their ventures.

Table 4 provides information on the most frequent partners for innovation co-operation, broken down by geographical location and the type of co-operation partner.

It would appear that enterprises with innovation activity have a higher propensity to engage in joint innovation ventures with their business partners, especially their suppliers (upstream) and their

clients and customers (downstream) than with other types of partners. However joint projects with enterprises within the same enterprise group or with universities were also relatively frequent, while commercial laboratories or R&D enterprises were the least frequently used innovation partners.

Co-operation projects were most often with national partners. When co-operation extended outside of the EU and EFTA, it was mainly with enterprises and organisations that were located in the United States, rather than Japan or the candidate countries.

CIS3 reveals that large enterprises were more likely than smaller enterprises to set up co-operation arrangements. Indeed, some 61 %

of large industrial enterprises with innovation activity and 47 % of large services enterprises with innovation activity had some form of co-operation. The corresponding shares for small enterprises were 11 % and 18 % respectively.

There were few differences between industrial and services enterprises as regards their propensity to co-operate. Some 17 % of industrial enterprises with innovation activity had some form of co-operation, while the corresponding share in services was 22 %. The largest difference was reported for process only innovators, 21 % of which in services had some form of co-operation compared to 9 % in the industrial economy.

Table 4: Incidence of innovation co-operation in the EU, by partner and by location: proportion of enterprises with innovation activity indicating co-operation with specified partners in specified locations, 1998-2000 (%)

Partner	Location					
	National	EU or EFTA countries	Candidate countries	US	Japan	Other
Other enterprises within the enterprise group	23	13	2	6	1	2
Suppliers	36	16	2	5	1	3
Clients or customers	35	15	3	6	2	4
Competitors within the same industry	25	8	1	2	1	2
Consultants	24	4	0	1	0	1
Commercial laboratories/R&D enterprises	16	5	1	1	0	1
Universities or higher education institutes	35	7	1	2	0	1
Government or non-profit research institutes	21	4	0	1	0	1

Table 5: Incidence of innovation co-operation in the EU, by sector and by size-class, 1998-2000

	Number of enterprises (units)	Industry				Services				
		Proportion of enterprises indicating that they had co-operation agreements (%)				Proportion of enterprises indicating that they had co-operation agreements (%)				
		All	Small	Medium	Large	All	Small	Medium	Large	
Enterprises with innovation activity	129 995	17	11	22	61	71 284	22	18	29	47
Successful innovators	121 967	18	11	23	62	64 400	22	18	30	47
Product only	27 146	20	14	29	68	20 333	21	18	32	40
Process only	23 739	9	5	20	51	8 725	21	17	31	42
Product and process	71 082	19	12	21	62	35 341	23	19	29	49
On-going and/or abandoned	8 028	12	8	19	42	6 884	17	16	18	51

## 4. Intramural research and development (R&D)

As part of the CIS3 survey, enterprises were asked if they had intramural research and development (R&D) activities. For those enterprises that answered positively to this question, data were compiled on the number of persons involved in intramural R&D in 2000, for persons inside and outside the enterprises' R&D department. Furthermore information concerning the nature of the enterprise's engagement in R&D during the period 1998-2000 was collected, distinguishing between continuous or occasional activity. Intramural R&D is defined as all creative work undertaken within the enterprise to increase the stock of knowledge and the use of this stock to devise new and improved products and processes. Tables 6 and 7 below present results for enterprises with innovation activity.

Table 6 indicates that a higher share of industrial enterprises tended to be engaged continuously in intramural R&D than services enterprises. Indeed, almost a third of industrial enterprises did so, whereas the corresponding share for services enterprises was closer to a quarter.

The proportion of enterprises that were engaged in continuous R&D was much higher among large industrial enterprises (69%) than among small industrial enterprises (21%). Shares were lower among enterprises in the services sector, at 44% and 20% respectively. Around a quarter of small and medium-sized industrial enterprises were engaged occasionally in intramural R&D, while among large industrial enterprises the share was 14%.

Table 7 provides results broken down by type of innovator. It would appear that product and process innovators (41%) and product only innovators (32%) in the industrial sector were the most likely to engage continuously in R&D, while process only innovators were the least likely (8%).

Among industrial enterprises, the highest share of enterprises occasionally engaged in intramural R&D was registered by enterprises with only on-going and/or abandoned innovation activity (28%).

Table 6: Intramural research and development (R&D) in the EU, by sector and by size-class

	Industry				Services			
	Enterprises with innovation activity, by size-class				Enterprises with innovation activity, by size-class			
	All	Small	Medium	Large	All	Small	Medium	Large
Persons involved in intramural R&D, 2000 (full-time equivalents)	747 944	77 783	108 916	561 245	367 384	70 472	54 292	242 618
Enterprises engaged in R&D continuously, 1998-2000 (%)	30	21	40	69	23	20	26	44
Enterprises engaged in R&D occasionally, 1998-2000 (%)	24	24	26	14	19	20	16	17

Table 7: Intramural research and development (R&D) in the EU, by sector and by type of innovator

	Industry					Services				
	Enterprises with innovation activity, by type of innovator					Enterprises with innovation activity, by type of innovator				
	All	Prod. only	Proc. only	Product and process	On-going and/or abandoned	All	Prod. only	Proc. only	Product and process	On-going and/or abandoned
Persons involved in intramural R&D, 2000 (full-time equivalents)	747 944	:	:	592 093	:	367 384	:	:	294 576	:
Enterprises engaged in R&D continuously, 1998-2000 (%)	30	32	8	41	23	23	22	:	34	:
Enterprises engaged in R&D occasionally, 1998-2000 (%)	24	25	19	25	28	19	19	:	21	:

## 5. Innovation funding

Questions on public funding were included as part of the CIS3 survey. Public funding is defined as financial support in terms of grants and loans, including a subsidy element, and loan guarantees.

The three types of public funding that were taken into account for the survey were: local or regional funds, central government funds and EU funds. The third of these headings was further investigated to identify funding from the 4<sup>th</sup> or 5<sup>th</sup> RTD (research and technological development) Framework programmes. These programmes covered all research activities funded by the European Commission during the periods 1994-1998 and 1998-2002 respectively, with budgets in excess of 13 billion Euros.

It is important to note that the total number of enterprises that received funding is lower than the sum of enterprises receiving the different types of funding, as multiple sources of funding are possible.

In the EU, during the period 1998-2000, more than 45 000 industrial enterprises with innovation activity received public funding. The corresponding figure for services enterprises was close to 14 000.

Table 8 presents the results with a breakdown by size-class. It appears that large enterprises with innovation activity were more likely to receive public funding than SMEs. Indeed, more than 50 % of large industrial enterprises received some form of funding, while 32 % of small and 35 % of medium-sized

enterprises did. The relative difference between size classes was smallest with respect to local or regional funding, and greatest for EU funding.

When looking at the results broken down by type of innovator, in table 9, it can be noted that all three types of successful innovators in industry generally benefited more often from public funding than enterprises with only on-going and/or abandoned innovation activity. Almost half of all industrial process only innovators received some form of funding, compared to around one third of the other types of industrial innovators.

Table 8: Public funding in the EU among enterprises with innovation activity, by size-class, 1998-2000

	Industry					Services				
	Absolute figures	Proportion of enterprises having received public funding (%)				Absolute figures	Proportion of enterprises having received public funding (%)			
		All	Small	Medium	Large		All	Small	Medium	Large
Received funding	45 128	35	32	35	57	13 727	19	18	21	26
Local or regional	22 704	17	18	15	22	7 718	11	11	12	12
Central government	23 859	18	15	21	41	6 116	9	8	10	16
EU	10 141	8	6	8	22	3 504	5	4	7	14
4th or 5th RTD	5 357	4	3	4	17	2 560	4	3	6	10

Table 9: Public funding in the EU among enterprises with innovation activity, by type of innovator, 1998-2000

	Industry						Services					
	Absolute figures	Proportion of enterprises having received public funding (%)					Absolute figures	Proportion of enterprises having received public funding (%)				
		All	Prod. only	Proc. only	Product and process	On-going and/or abandoned		All	Prod. only	Proc. only	Product and process	On-going and/or abandoned
Received funding	45 128	35	36	46	32	25	13 727	19	21	:	18	:
Local or regional	22 704	17	18	25	16	8	7 718	11	11	:	9	:
Central government	23 859	18	19	20	18	13	6 116	9	9	:	9	:
EU	10 141	8	8	9	7	9	3 504	5	5	:	5	:
4th or 5th RTD	5 357	4	4	4	4	3	2 560	4	5	:	3	:

## 6. Human resources for innovation

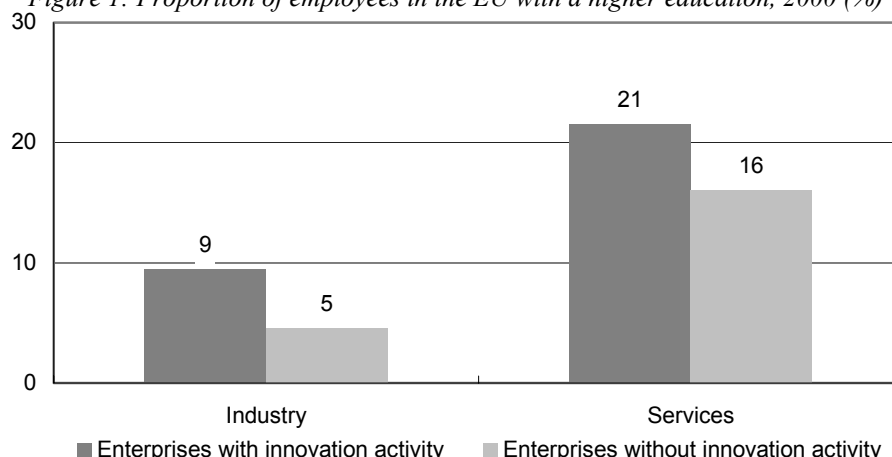
The implementation of innovation activities is thought to be linked to the quality of human resources available to each enterprise. CIS3 clearly highlights a pattern between the level of education of the workforce and the propensity of enterprises to innovate.

Table 10 shows that across nearly all size classes and sectors, enterprises with innovation activity reported larger proportions of their workforce with a higher education than non-innovators.

Enterprises of all sizes in the services sector had a higher proportion of employees with a higher education than their counterparts in industrial activities - whether the enterprise had some form of innovation activity or not.

The difference in the proportion of employees with a higher education between enterprises with and without innovation activity was largest among small enterprises in the services sector.

Figure 1: Proportion of employees in the EU with a higher education, 2000 (%)



Within industry, the proportion of employees with a higher education was clearly linked to the average size of the enterprise: the larger the enterprise, the higher the proportion of employees that had attained a higher education. This observation held true for both enterprises with and without innovation activity. Note that the proportion of employees with a higher education in the industrial sector was usually at least 10 percentage points below the corresponding proportion reported for the services sector.

Among enterprises in the services sector in contrast, smaller enterprises with innovation activity generally reported a larger proportion of employees with a higher education (26 %) than their medium-sized (24 %) and large (20 %) counterparts.

On the other hand, among enterprises without innovation activity in the services sector, it was large enterprises that had the highest proportion of employees with a higher education.

Table 10: Proportion of employees with a higher education, EU, 2000

	Industry					Services				
	Employees with a higher education (000)	Proportion of employees with a higher education (%)				Employees with a higher education (000)	Proportion of employees with a higher education (%)			
		All	Small	Medium	Large		All	Small	Medium	Large
All enterprises	1 739	8	5	7	10	2 732	20	18	20	20
Enterprises with innovation activity	1 472	9	7	8	11	2 080	21	26	24	20
Successful innovators	1 430	9	:	:	:	:	:	:	:	:
Product only	:	:	:	11	:	:	:	:	27	:
Process only	:	:	:	:	:	:	:	:	:	:
Product and process	1 050	10	6	6	11	1 548	22	30	27	21
On-going and/or abandoned	42	8	:	:	:	:	:	:	:	:
Enterprises without innovation activity	267	5	4	5	6	652	16	14	16	21

## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The first Community Innovation Survey (CIS1) was carried out in 1993 and the second round (CIS2) in 1997/1998. The third round (CIS3) was implemented in 2000/2001. Norway, Iceland, Luxembourg and Greece launched it in 2002.

CIS3 covered the period 1998 to 2000; while the reference period was 1999 to 2001 for Norway. As in previous Community Innovation Surveys, CIS3 was based on the Oslo Manual (second edition from 1997) which gives methodological guidelines and defines basic innovation concepts. CIS3 data were collected using a common core questionnaire and survey methodology developed by Eurostat in close co-operation with the EU Member States. The objective was to have comparable, harmonised and representative data on a pan-European scale. The Spanish data is based on an earlier version of the CIS3 questionnaire. The organisations responsible for CIS3 at a national level were in most cases the National Statistical Office or a government ministry.

### **TARGET POPULATION**

The statistical unit in CIS3 was the enterprise. The target population was the population of enterprises with 10 employees and more. Industry is an aggregate of NACE Sections C to E and the services sector is an aggregate of the remaining NACE headings:

	NACE
Mining and quarrying	Section C
Manufacturing	Section D
Electricity, gas and water supply	Section E
Wholesale trade	Division 51
Transport, storage and communication	Section I
Financial intermediation	Section J
Computer and related activities	Division 72
Research and development	Division 73
Architectural and engineering activities	Group 74.2
Technical testing and analysis	Group 74.3

### **SURVEY METHOD**

Innovation data from CIS3 was in most cases collected using a stratified sample survey. The samples in CIS3 were drawn by using random selection in each stratum, the latter being defined by a combination of employee size classes and NACE Divisions.

CIS3 data is based on answers from more than 60 000 enterprises spread across the EU Member States, Norway and Iceland. The response rates varied from as low as 22 % to over 80 %. The results presented are grossed-up figures for the whole population; the results of a non-response analysis may also have been taken into account by some countries.

### **CIS3 definitions**

#### ***Innovation***

An *innovation* is a new or significantly improved product (good or service) introduced to the market or the introduction within an enterprise of a new or significantly improved process. Innovations are based on the results of new technological developments, new combinations of existing technology or the utilisation of other knowledge acquired by the enterprise.

Innovations may be developed by the innovating enterprise or by another enterprise; however, purely selling innovations wholly produced and developed by other enterprises is not included as an innovation activity.

Innovations should be new to the enterprise concerned; for product innovations they do not necessarily have to be new to the market and for process innovations the enterprise does not necessarily have to be the first to have introduced the process.

A *product innovation* is a product (good or service) which is either new or significantly improved with respect to its fundamental characteristics, technical specifications, incorporated software or other immaterial components, intended uses, or user friendliness. Changes of a solely aesthetic nature are not included.

A *process innovation* includes new and significantly improved production technology, methods of supplying services and of delivering products. The outcome (of the process) should be significant with respect to the level of output, quality of products or costs of production and distribution. Purely organisational or managerial changes are not included.

#### ***Enterprises with innovation activity***

Enterprises that have had any kind of innovation activity during the survey period, i.e. have introduced or implemented new products and/or processes and/or have had on-going and/or abandoned innovation activity.

#### ***Successful innovators***

Enterprises that have introduced or implemented new products and/or processes.

#### ***Size classes***

The following size classes, based on the number of employees, were used for the compilation of aggregated results:

Small enterprises	10 to 49 employees
Medium-sized enterprises	50 to 249 employees
Large enterprises	250 or more employees

#### ***Symbols***

: Not available.

The data used for this publication were extracted on 07/01/2004.

# Further information:

## ➤ Reference publications

Title Innovation in Europe (forthcoming)

## ➤ Databases

NewCronos, Theme 9, Domain: innovat

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