

Innobarometer

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Fieldwork September 2003

Publication February 2004

This survey was requested by Directorate General Enterprise and coordinated by Directorate General Press and Communication

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FLASH EUROBAROMETER 144

“INNOBAROMETER”

Realised by EOS Gallup Europe upon the request of the European Commission
(Directorate General “Enterprise”)

Survey organised and managed by Directorate General “Press and Communication”
(Opinion Polls, Press Reviews, Europe Direct)

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SURVEY: September 2003

ANALYTICAL REPORT: October 2003

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PRESENTATION

Scope of the survey

"Innovation in 2003: experience and priorities of European managers" was the subject of the latest Innobarometer survey carried out in September 2003 for the European Commission in the 15 Member States of the European Union under the Flash Eurobarometer opinion poll system.

As in 2001 and 2002, its objective was to sound out the opinions of European managers on their companies' needs in innovation, their investments in innovation and the output achieved. In addition, it looked at the driving forces for innovation, the impact of the market on innovation as well as the development of new managerial approaches to innovation. It also aimed at assessing how the Single Market can be of further benefit to companies in the European Union.

The first wave of this survey, held in May 2001 (the second wave was in September 2002), had been foreseen by the Commission in its Communication to the Council and to the European Parliament, "Innovation in a knowledge-based economy", in September 2000¹. This opinion poll on attitudes towards innovation, featured as one of a number of measures designed to promote the objective of **moving towards a society open to innovation**. In fact enhancing innovation is a cornerstone of the strategy to meet the target agreed by the European Council in Lisbon in March 2000 of the Union becoming the most competitive and dynamic knowledge-based economy by the end of the decade.

In March 2003, the European Commission published a Communication to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions whereby the objectives are to describe the diverse routes to innovation and analyse the consequences for the design of innovation policy and for the different means by which innovation policy is put into action². Indeed this Communication states that studies such as the Innobarometer which, allow for the monitoring of managers' opinions, fall under the group of activities dedicated to the observation of innovation policy and performance in Europe.

The methodology used in the third wave of this survey, carried out by EOS GALLUP EUROPE, is that of the FLASH surveys of the Directorate General Press and Communication (Unit B/1 "Opinion polls")

A total of 3 010 managers at companies employing at least 20 people were interviewed by telephone between the 1st and the 18th of September 2003. The sample was selected according to three criteria: *country, size of company and activity sector*. In Member States with the most companies (**Germany, Spain, France, Italy** and the **UK**), 300 managers per country were interviewed. In those with the fewest companies (**Greece, Ireland, Luxembourg, Portugal** and **Finland**) the figure was 100 each, and 200 managers were consulted in each of the remaining EU Member States: (**Belgium, Denmark, the Netherlands, Austria** and **Sweden**).

The person interviewed at each company was a top-level executive either part of General Management or Financial Management. The term "innovation" was interpreted on the basis of the experience of the particular manager being interviewed. However, for the purposes of our analysis we will recall the definition cited by the European Commission in its Communication in 1995: *"innovation is the renewal and enlargement of the range of products and services and the associated markets; the establishment of new methods of production, supply and distribution; the introduction of changes in management, work organisation, and the working conditions and skills of the workforce"*³.

¹ COM (2000) 567 final « Innovation in a knowledge-driven economy »

² COM (2003) 112 final « Innovation policy : updating the Union's approach in the context of the Lisbon strategy »

³ COM (1995) 688

This definition continues to be a valid basis for the Commission's innovation policy and is consistent with the Lisbon European Council's perception of the importance of innovation to competitiveness.

For each theme addressed, our analysis looks at the:

- European Union as a whole and each of its 15 Member States;
- various types of companies (in terms of workforce size): "majors" (250 employees or more), "small SMEs" (20 to 49 employees) and "large SMEs" (50 to 249 employees);
- sector of activity: "construction", "industry" (manufacturing companies), "trade" and "services";
- share of sales accounted for by exports;
- age of the company.

Since the initial Innobarometer in 2001, this research has been carried out on an annual basis and the results presented here correspond to the third wave of this study. For questions that remained unchanged we will compare the results with those obtained in previous waves. When comparing results it is useful to recall the economic context. At the time of the initial Innobarometer study (May 2001) the overall economy was slowing down. A few months later, the September 11th attack on the World Trade Centre was the catalyst that accelerated the economic downturn across Europe. When a recession hits, innovation is often one of the first activities in a company to suffer. In our analysis, we will see some striking evolutions in the question related to unsatisfied needs.

Modifications to the questionnaire over the course of the three years aim at refining our research being the case for the questions we will analyse in chapter 1. The objective of these questions being to position companies in terms of their investment in innovation and the benefits ensuing.

The questions on new organisational and managerial approaches to management of innovation were first asked in September 2002 and are easily comparable with our latest results. Similarly, the question on the future receptiveness of the market to innovative products will be compared.

The pages that follow give a brief summary of managers' responses, which is then followed by a more in-depth analysis. A detailed description of the sample and methodological note are included in the annexes.

Managers' opinions can be summarised as follows

Increasing proportions of enterprises in the European Union engage in innovative activity from 2002 to 2003:

- In general, close to four out of five companies introduced new or renewed products or services over the last two years.
- The category of “*big investors*” whose investment in innovation corresponds to “51% or more” of total investment now represents 14% of companies, and only one company in ten has not made any investments in innovation during the last two years.
- The manufacturing sector stands out for the relatively high proportion of companies dedicating over 50% of their investment to innovation. Exporting and “younger” companies are also more likely to heavily invest in innovation.
- Over six in ten managers are optimistic about the improvement in their performance over the last two years, with considerably high levels of confidence in three of the Mediterranean countries: Italy, Spain and Greece.

Consumers are key to innovation; their needs and accessibility are the motors of innovation:

- Response to consumer needs is the most compelling factor for companies to innovate, being ranked highest by 35% of managers in the European Union. This factor seems to be a particularly important spur for large companies, those in services or, companies that have been established for less than 10 years.
- The most important unsatisfied need relating to innovation for EU managers is access to innovative customers and/or markets, being the case of 37% of respondents.

Support of staff proves exceptional:

- Company personnel seem to offer exceptionally high levels of support being confirmed by an average of 88% of managers in the EU and ranking as the most satisfactory player intervening in the innovative effort. High levels of unawareness seem to surround both the role of the European Institutions in innovation and national bodies granting patents.

The continued importance of co-operation with suppliers and users:

- 86% of business leaders are rather satisfied with their collaboration with suppliers or customers in order to access advanced technologies. One in two managers are rather satisfied with in-house R&D as a means of accessing advanced technologies. Technology transfer by way of contract research (co-operation with universities and R&D specialists) does not seem to be satisfactory at the European Union level.
- The strengthening of supplier/user relationships continues to rank as the top priority for an average of 23% of managers in the EU in their new approaches to the management of innovation. However, innovation fits into an overall strategy and is not just a specific independent improvement.
- Managers would clearly prefer advice on new methods of management from private external consultants, rather than from, for example, public or semi-public advisory centres.

Globalisation of markets is an opportunity for innovation and a majority are optimistic about rewards for future innovative efforts:

- The challenge of the time to market effect should spur companies to innovate: 90% of company managers agree that companies should continue to innovate when faced with shorter and shorter time lapses from the time of conception of a new product or service to its launch on the market.
- The vast majority of companies in the European Union are already convinced of the necessity to innovate: 86% of managers interviewed see the market their company is operating in as a force obliging companies to innovate. While the market obliges companies to innovate, it also rewards innovative efforts: 54% of executives believe that the market that their company is operating in will become more receptive to innovative products.
- Close to three in four managers in the European Union agree that the opening up of worldwide markets to goods, services, capital, technologies and people is an opportunity for innovation. In each Member State a majority of managers view globalisation of markets as an opportunity for innovation.

The European dimension: positive attitudes towards the Community Patent and improved regulations:

- Enthusiasm for the effectiveness of a Community Patent is shared by 58% of executives believing that this would be “effective” for companies in general to innovate and 46% believe that this would be “effective” for their own company. Moreover, levels of uncertainty are dispersed across Member States often with high proportions of managers unable to express an opinion on this.
- Managers view the European Single Market as an important driving force for innovation, through better access to new, innovative markets for products and services as well as its improved regulations.

The 2003 Innobarometer thus underlines the willingness of European managers to strengthen their competitive position through innovation. In a difficult economic climate, the role of markets that are open to innovative products is considered even more crucial. Managers expect their efforts in innovation to particularly benefit from both the market dimension of the European Union and its common rules.

The effect of a Community Patent should be clarified for many companies across the Member States in order to effectively reward the innovative efforts of companies operating in the Single Market. Continued efforts are needed to ensure that innovative companies are supported and rewarded and thereby lead the Union towards a truly common innovative economy.

1.1 Quel est le pourcentage approximatif de votre chiffre d'affaires réalisé par des produits ou services, nouveaux ou renouvelés, mis sur le marché au cours des deux dernières années ?

1.1 Approximately what percentage of your turnover comes from new or renewed products or services, introduced during the last two years?

	0%	1-5 %	6-10 %	11-20 %	21-50 %	> 51 %	BASE
EU 15	20%	22%	18%	15%	14%	10%	2849
DEUTSCHLAND	14%	25%	17%	16%	16%	11%	286
DANMARK	15%	17%	24%	16%	22%	6%	185
IRELAND	19%	14%	19%	17%	19%	12%	95
ITALIA	21%	22%	22%	16%	13%	7%	294
SWEDEN	21%	24%	21%	13%	10%	11%	172
PORTUGAL	22%	14%	15%	17%	17%	15%	87
OSTERREICH	22%	23%	21%	14%	11%	9%	172
FINLAND	23%	34%	17%	10%	12%	5%	90
UNITED KINGDOM	23%	13%	20%	14%	16%	14%	282
ESPANA	23%	15%	11%	19%	19%	13%	287
NEDERLANDS	23%	34%	19%	12%	9%	3%	198
LUXEMBOURG	24%	32%	16%	18%	8%	2%	92
FRANCE	27%	26%	17%	12%	11%	7%	286
ELLAS	32%	21%	15%	12%	13%	8%	94
BELGIQUE	34%	20%	20%	11%	8%	7%	188
SECTEURS - SECTORS							
industrie - industry	15%	19%	22%	20%	14%	10%	865
construction	30%	28%	16%	11%	9%	6%	356
trade - commerce	15%	23%	20%	15%	15%	12%	656
services	25%	21%	14%	13%	16%	11%	972
TAILLES ENTR.-BUSINESS SIZES							
SME 20-49	23%	22%	18%	14%	13%	10%	2055
SME 50-49	16%	21%	18%	17%	18%	11%	653
MAJORS 250+	10%	26%	19%	24%	16%	4%	141
EXISTE DEPUIS - ACTIVE SINCE							
+30ans / + 30years	22%	24%	20%	14%	13%	7%	1319
11-30ans / 11-30 years	19%	23%	16%	18%	14%	10%	950
0-10ans / 0-10 years	19%	15%	16%	14%	19%	17%	577
EXPORTS %							
Rien / None	27%	23%	15%	13%	13%	10%	1460
Moins de 50% / Less than 50%	15%	20%	21%	19%	16%	9%	953
Supérieur ou égal à 50% / More than or equal to 50%	13%	15%	24%	17%	16%	16%	327

1. THE IMPORTANCE OF INNOVATION TO COMPANIES

As for the previous waves of this study, the results in this chapter exclude respondents who fall under the “don't know/no answer” category, reducing the overall respondent base. The questions analysed in this chapter were modified since the previous waves in that this year, the answer options given allowed respondents to position themselves within a pre-defined range. The underlying objective of this modification was to reduce the overall proportion of respondents unable to give an estimated percentage and indeed in comparison to last year we can see that the respondent base has increased, or in other words the “don't know/no answer” category has decreased.

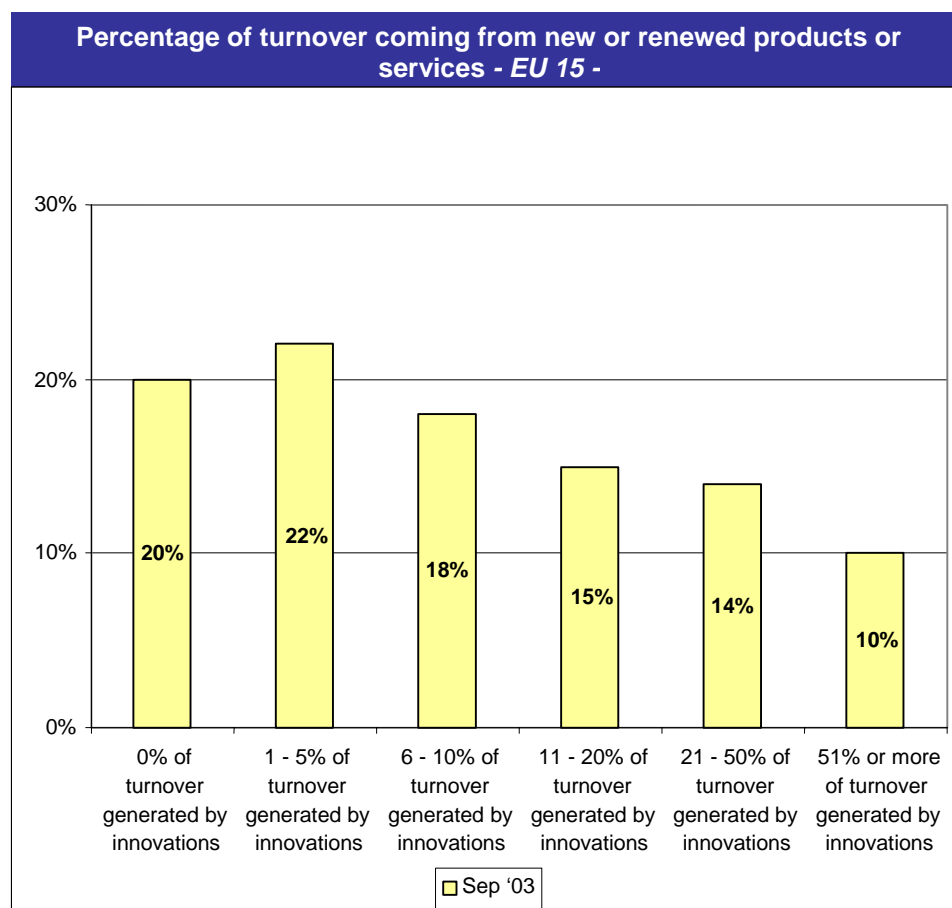
1.1. Share of turnover generated by innovations

- Close to four out of five companies introduced new or renewed products or services over the last two years -

* Overall picture:

In general, close to four out of five companies introduced new or renewed products or services over the last two years. The proportion of companies with some share of turnover due to innovative products or services has progressively increased since 2001, with seemingly more companies engaging in innovative activities.

The proportion of companies without any new or renewed products or services fell to 20% in September 2003. The decrease in this latest survey could be partly due to the fact that the ranges given as answer options helped respondents to more accurately position their company. 10% of companies can be considered to be “*highly innovative*”, with over half of their turnover generated by new or renewed products or services. Looking at “*moderately innovative enterprises*” i.e. companies with some 11% to 20% of turnover generated by new or renewed products or services, we can see that 15% of companies in the EU fall under this category.



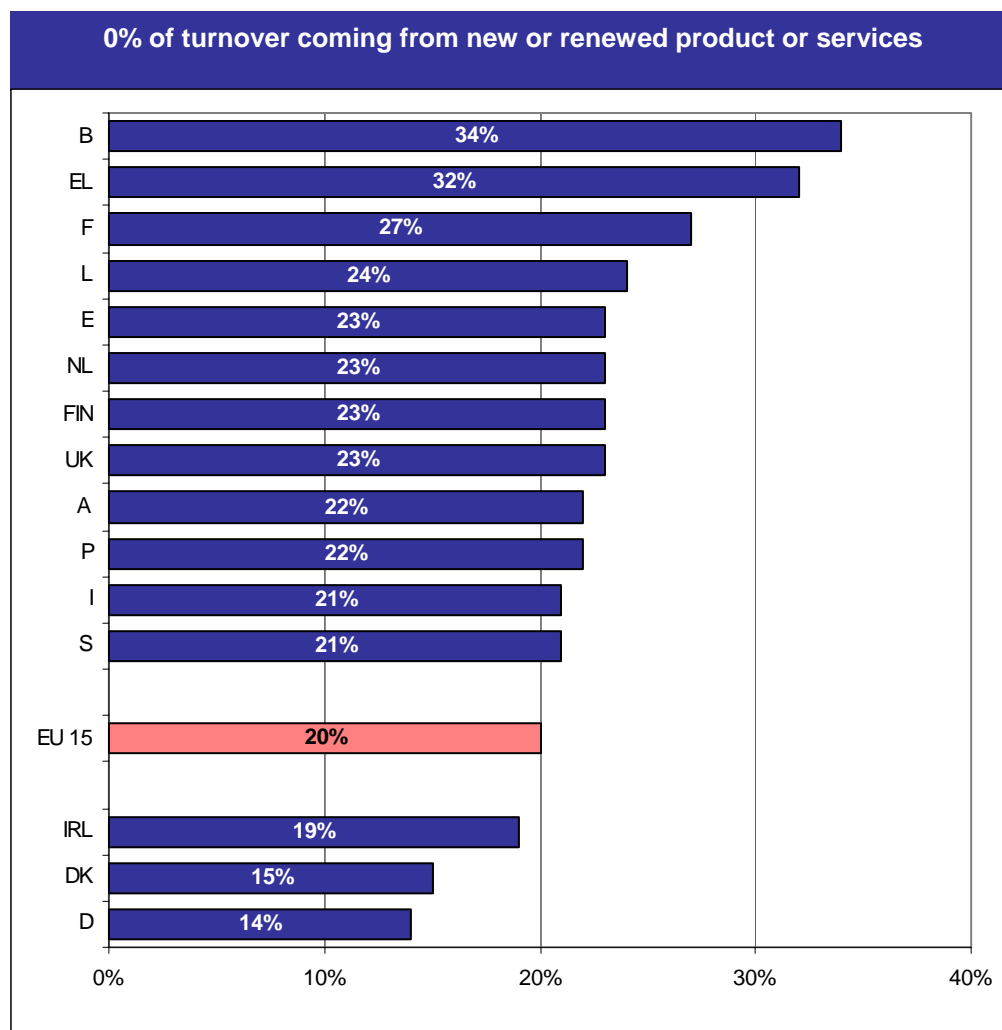
Flash EB 144 – September 2003 – Fig.1A

*

Breakdown by country:

A country-by-country comparison of the percentage share of companies' turnover accounted for by innovations shows that this proportion differs considerably between Member States.

The graph below (figure 1B) shows companies that are not reaping the rewards of innovation i.e. 0% of turnover coming from new or renewed products or services introduced during the last two years. Compared to other Member States, the countries where more companies are “non-innovators” are **Belgium** (34%), **Greece** (32%) and **France** (27%). In **Belgium** and **Greece** the overall proportion of “non-innovators” has risen compared to September 2002 while at the other end of the scale, in **Germany** and **Denmark** the proportion of “non-innovators” has decreased.



Flash EB 144 – September 2003 – Fig.1B

Looking at companies with a *high share of turnover* generated by innovations, the “51-100%” category, **Portugal** ranks highest with 15%, followed by the **United Kingdom** (14%), **Spain** (13%) and **Ireland** (12%). However, **Luxembourg** (2%) and the **Netherlands** (3%) can be distinguished in this group for the opposite reason and moreover, the results decreased since September 2002.

*

Breakdown by company category:

This year's survey confirms the findings revealed in the previous wave of this study.

Firstly that the age of the company bears an influence: "*younger companies*" (0-10 years) are more likely to have a larger percentage of their turnover ("21-50%" and "51% or more" categories) generated by new or renewed products or services.

Secondly, companies with exports amounting to at least 50% of their sales are more likely to be reliant on new or renewed products or services with over half of their turnover accounted for by innovations.

1.2 Durant ces deux dernières années, quel a été le pourcentage approximatif de vos investissements consacré à l'innovation, que ce soit pour vos produits, vos procédés ou votre organisation ?

1.2 In the last two years, approximately what percentage of your investment was dedicated to innovation either in your products, processes or organisation ?

	0%	1-5 %	6-10 %	11-20 %	21-50 %	> 51 %	BASE
EU 15	11%	26%	21%	16%	13%	14%	2864
ITALIA	4%	22%	24%	24%	14%	12%	295
PORTUGAL	5%	14%	21%	27%	19%	15%	95
ESPANA	7%	24%	18%	17%	15%	20%	286
DEUTSCHLAND	9%	24%	20%	16%	15%	16%	293
SWEDEN	9%	29%	14%	8%	18%	21%	170
ELLAS	10%	27%	22%	17%	16%	8%	94
IRELAND	11%	29%	27%	18%	9%	6%	93
LUXEMBOURG	12%	31%	22%	19%	15%	1%	92
BELGIQUE	14%	32%	23%	12%	11%	8%	191
FRANCE	17%	37%	23%	9%	7%	7%	292
NEDERLANDS	17%	32%	15%	14%	12%	10%	186
OSTERREICH	17%	27%	19%	11%	15%	10%	167
DANMARK	18%	27%	11%	11%	17%	17%	184
FINLAND	18%	42%	13%	10%	7%	11%	93
UNITED KINGDOM	18%	23%	22%	13%	12%	13%	272
SECTEURS – SECTORS							
industrie - industry	8%	20%	20%	19%	15%	18%	855
construction	11%	34%	25%	14%	9%	7%	358
trade - commerce	14%	29%	20%	14%	13%	11%	658
services	11%	26%	20%	14%	14%	14%	993
TAILLES ENTR.-BUSINESS SIZES							
SME 20-49	12%	27%	21%	15%	12%	13%	2077
SME 50-49	8%	23%	20%	17%	16%	17%	643
MAJORS 250+	6%	28%	20%	18%	16%	11%	145
EXISTE DEPUIS - ACTIVE SINCE							
+30ans / + 30years	14%	28%	22%	13%	12%	11%	1306
11-30ans / 11-30 years	9%	27%	19%	19%	13%	14%	960
0-10ans / 0-10 years	9%	19%	21%	16%	17%	17%	596
EXPORTS %							
Rien / None	14%	26%	22%	15%	11%	11%	1481
Moins de 50% / Less than 50%	8%	26%	19%	16%	14%	17%	950
Supérieur ou égal à 50% / More than or equal to 50%	8%	21%	23%	19%	16%	15%	327

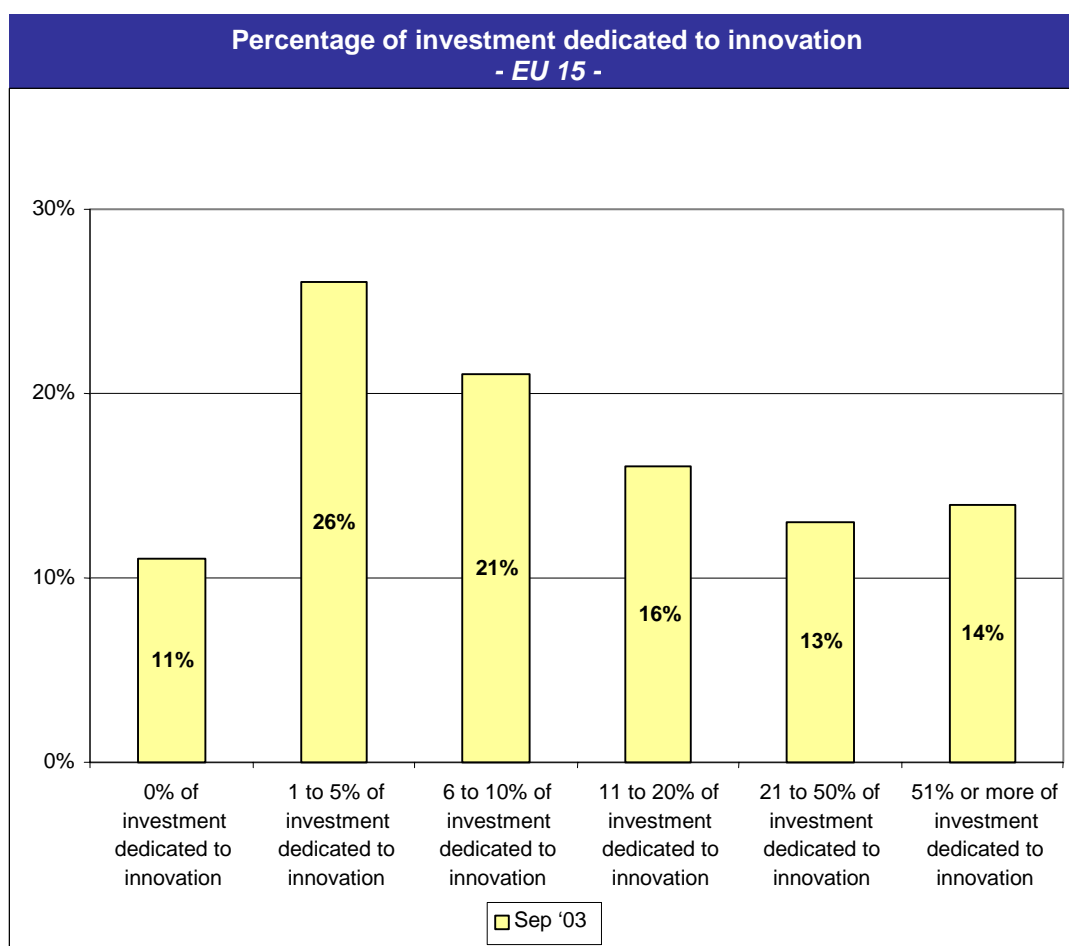
1.2. Share of investment channelled into innovation

- Close to nine in ten companies are investing in innovation -

While the first question related to the results of innovative activities, i.e. new or renewed products or services introduced on the market, this question is concerned with resources devoted to innovation in products/services, processes or the organisation.

* Overall picture:

In the European Union as a whole, just over one company in ten had not made any investments in innovation during the last two years (11% in the "0%" category), corresponding to a slight dip since September 2002. Whilst the "smaller investors" groups with 1-5% and 6-10% of investments devoted to innovation increased since September 2002, the result in the "bigger investors" categories ("21-50% and "51-100%") decreased.

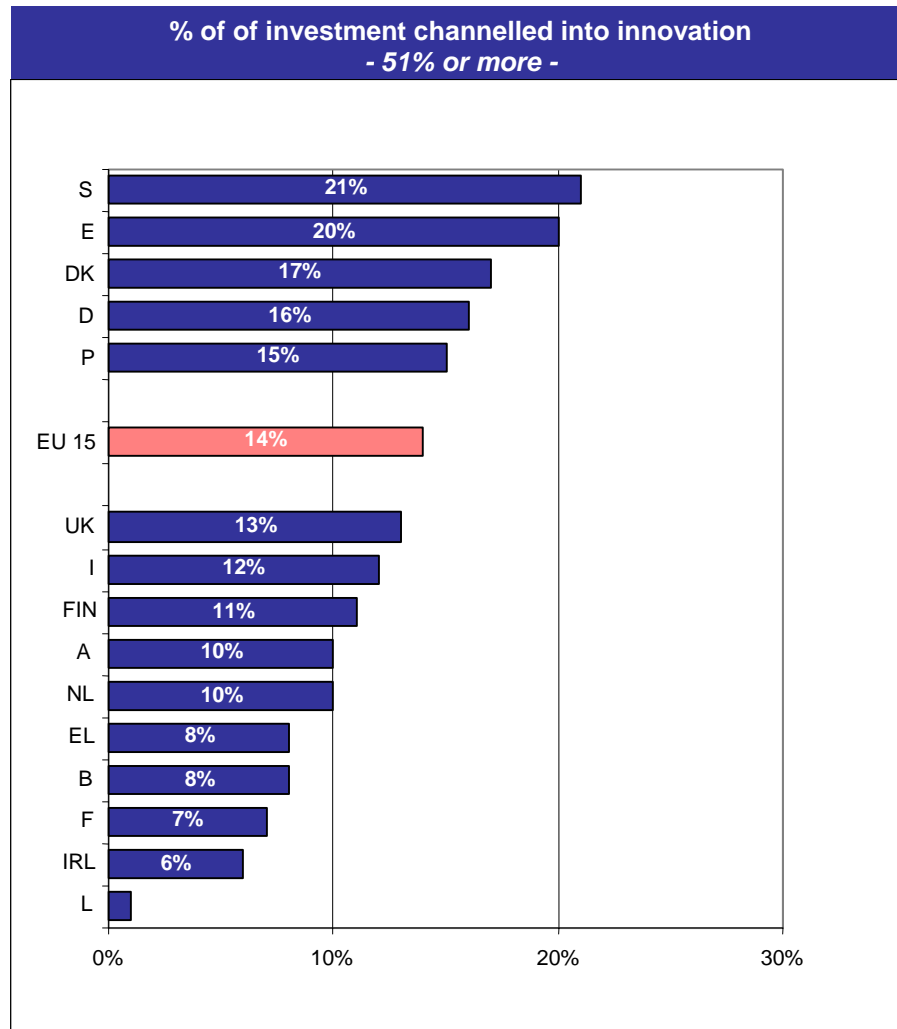


Flash EB 144 – September 2003 – Fig.2A

*

Breakdown by country:

The graph below shows the percentage of investment channelled into innovation for “big investors” i.e. where the company investment in innovation corresponds to “51% or more” of their total investment.



Flash EB 144 – September 2003 – Fig.2B

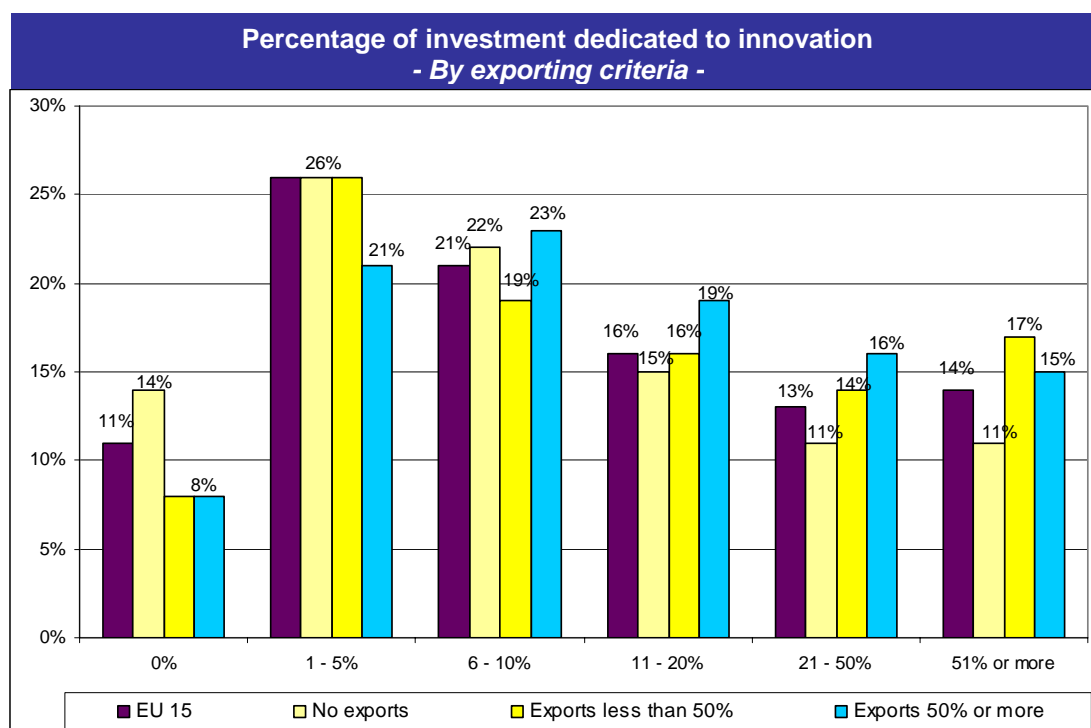
From the graph above (figure 2B), we can see that there are more “big investors” in innovation in **Sweden** (21%) and **Spain** (20%) than in any other Member State. At the other end of the scale it seems that the proportion of investment in innovation is considerably lower in companies in **Ireland** (6%) and **Luxembourg** (a mere 1%). In most countries (with the exception of **Sweden**) the proportion of “big investors” dropped or remained static since September of last year.

Turning to companies not investing in innovation over the last two-year period our results show that **Denmark, Finland, the United Kingdom, France, the Netherlands and Austria** have most companies falling under the “0%” category (18% for the first three cited and 17% for the last three). There is however, a downward evolution in the proportion of “non-investors” in most Member States (with the exception of **Luxembourg**) since September 2002.

It must be stressed, as for the last survey, that this does not necessarily mean that companies in certain countries are more “innovative” than those in others: neither the amounts invested, in absolute figures, nor the success of this investment are known. In the future it would be interesting to carry out an analysis into the relationship between investment in innovation and actual return in terms of turnover. The purpose of our analysis here is to measure the perceptions of top-level managers in companies, as the future course of innovation is indeed dependent on their views and decisions.

* **Breakdown by company category:**

Exporting companies channel a greater share of their investment into innovation and tend to be more likely to fall under the “*bigger investor*” categories with investment in innovation amounting to at least 21% of their total investment. As the graph below shows, 16% of companies whose sales are primarily in exports assign between 21% and 50% of their investment to innovation compared to 11% of non-exporting companies. The same tendency holds true for companies dedicating more than half of their investment to innovation (51% or more category). This corresponds with the relationship identified in the preceding question between the share of exports and the share of new or renewed products or services in turnover.



Flash EB 144 – September 2003 – Fig.2C

The industrial (manufacturing) sector stands out for the relatively high proportion (18%) of “*big investor*” companies (“51% or more”). Also, medium sized SMEs (“50-249”) tend to be more likely to be “*big investors*” (17%) compared to other size categories.

Another significant factor is the age of the company: “younger” companies (less than 10 years in existence) are more likely to heavily invest in innovation than older companies.

1.3 Lesquels des facteurs suivants ont incité le plus votre entreprise à innover au cours de ces deux dernières années ? Premièrement, Deuxièmement ?

1.3 Which of the following factors provided the strongest incentives for your company to innovate over the last two years? Firstly? Secondly?

Premièrement / Firstly

	réponse aux besoins des consommateurs / response to consumer needs	concurrence au niveau des prix / price competition	améliorer niveau de productivité / improve productivity level	améliorer l'efficacité équipements / improve efficiency of equipment	concurrence au niveau des produits / product competition	conformité nvlles obligations / compliance to new obligations	(NSP&SR) / (DK&NA)	BASE
EU 15	35%	14%	13%	13%	11%	10%	4%	3010
DEUTSCHLAND	47%	15%	14%	7%	9%	6%	3%	300
DANMARK	46%	17%	14%	7%	9%	5%	2%	203
OSTERREICH	41%	12%	5%	9%	8%	13%	12%	200
UNITED KINGDOM	36%	12%	11%	9%	14%	13%	4%	300
ESPANA	35%	9%	14%	19%	11%	7%	5%	300
IRELAND	35%	19%	11%	10%	9%	12%	4%	99
NEDERLANDS	34%	14%	9%	14%	8%	13%	8%	208
SWEDEN	34%	14%	15%	17%	10%	3%	8%	200
FINLAND	30%	17%	10%	9%	13%	6%	14%	100
PORTUGAL	29%	15%	12%	24%	10%	6%	4%	100
FRANCE	28%	14%	16%	8%	11%	19%	4%	300
LUXEMBOURG	27%	12%	26%	14%	10%	6%	5%	100
BELGIQUE	22%	9%	21%	17%	13%	13%	4%	200
ELLAS	21%	14%	19%	14%	20%	10%	3%	100
ITALIA	16%	15%	11%	33%	12%	12%	0%	300
SECTEURS - SECTORS								
industrie - industry	31%	16%	8%	18%	16%	7%	4%	891
construction	22%	20%	19%	15%	7%	14%	3%	374
trade - commerce	37%	17%	11%	10%	11%	10%	5%	701
services	42%	7%	17%	11%	7%	12%	3%	1044
TAILLES ENTR.-BUSINESS SIZES								
SME 20-49	36%	13%	14%	14%	10%	10%	4%	2178
SME 50-49	32%	16%	12%	13%	14%	10%	4%	677
MAJORS 250+	44%	9%	9%	7%	15%	12%	3%	155
EXISTE DEPUIS - ACTIVE SINCE								
+30ans / + 30years	32%	15%	13%	14%	11%	10%	5%	1392
11-30ans / 11-30 years	36%	14%	12%	14%	11%	10%	3%	997
0-10ans / 0-10 years	41%	9%	17%	11%	10%	11%	2%	619
EXPORTS %								
Rien / None	36%	13%	16%	12%	8%	11%	4%	1569
Moins de 50% / Less than 50%	35%	14%	9%	15%	14%	9%	4%	978
Supérieur ou égal à 50% / More than or equal to 50%	35%	16%	9%	14%	14%	11%	2%	339

2. EVALUATION OF INNOVATION

2.1. Endogenous and Exogenous forces

- Response to consumer needs is the most compelling factor for companies to innovate -

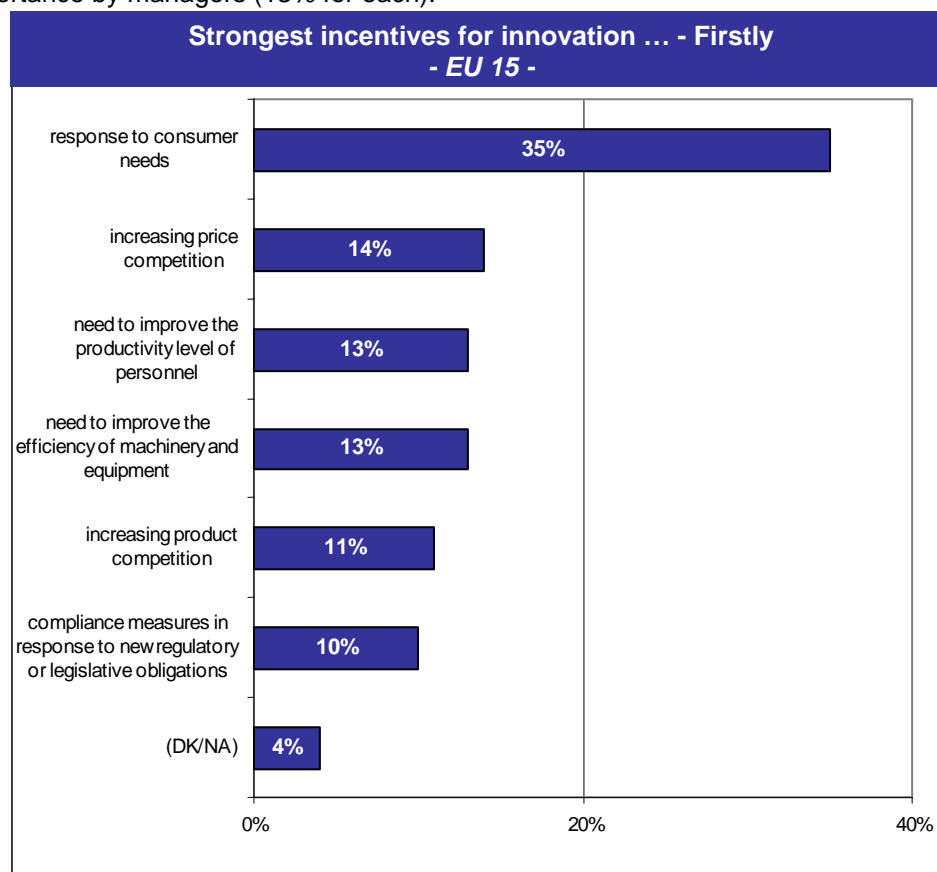
* **Overall picture:**

In its latest publication, the Commission states, “enterprises are spurred to innovate by pressures and challenges, notably competition and the desire to create new market space”.⁴ In this question managers were asked to select and prioritise the two strongest factors pushing them to innovate. By taking the results for managers “first” choice, we have a clear hierarchy of their ranking order.

Companies put consumers needs first. The overall results show that “response to consumer needs” stands out as the most compelling factor for innovation being the case for 35% of managers.

The distinction between other factors is less marked with results ranging from 14% for “increasing price competition” to 10% for “compliance measures in response to legislative obligations”. Product competition and hence innovation in products (11%) seems to be almost as important as price competition (14%). Enterprises cannot afford to lag behind in the race to generate new or renewed products and better ways to produce them. Regulatory requirements are considered to be the major spur to innovate by only 10% of managers.

Endogenous factors such as the “need to improve the productivity level of personnel” and the “need to improve the efficiency of machinery and equipment” are accorded equal importance by managers (13% for each).



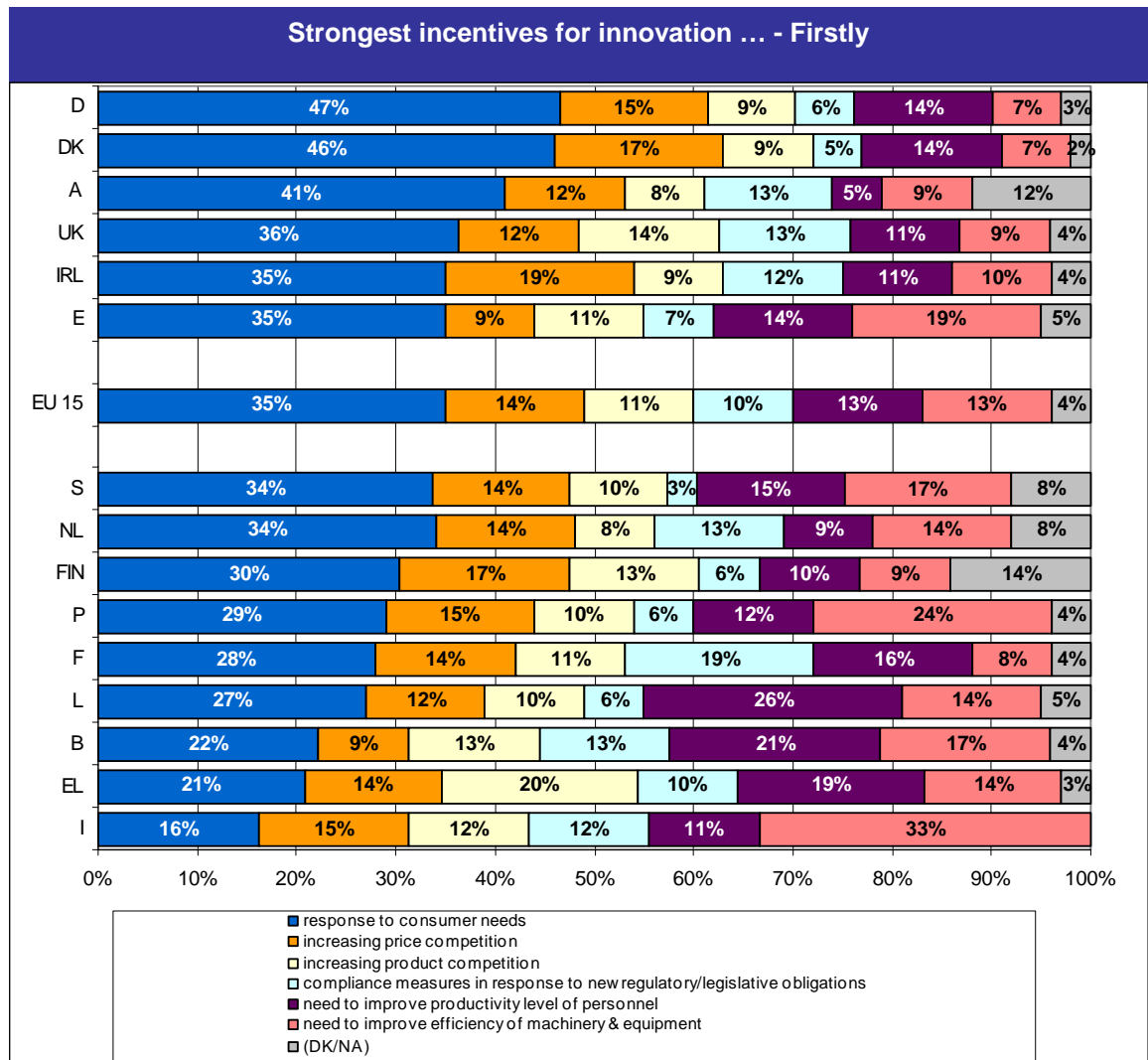
Flash EB 144 – September 2003 – Fig. 3A

⁴ COM (2003) 112 final

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Breakdown by country:

There are some interesting differences between countries regarding the factors spurring managers to innovate.



Flash EB 144 – September 2003 – Fig. 3B

In **Germany** (47%), **Denmark** (46%) and **Austria** (41%) a particularly high proportion of managers prioritise “consumer needs”. At the other end of the scale in **Italy** only 16% of managers consider consumer needs to be the major incentive to innovate.

Price and product competition as drivers of innovation seem to have a relatively similar impact in Member States. For “price competition”, the country results range from 19% in **Ireland** to 9% in **Spain** and **Belgium** and for “product competition”, the results range from 20% in **Greece** to 8% in the **Netherlands** and **Austria**.

Looking now at the endogenous factors (personnel and machinery and equipment) as potential spurs for innovation. The “need to improve the efficiency of machinery and equipment” is of noteworthy importance in **Italy** (33%) and **Portugal** (24%) with significant proportions of managers citing this as the major force for innovation for their company. In **Luxembourg** (26%), **Belgium** (21%) and **Greece** (19%) the “need to improve the productivity level of personnel” appears to be a relatively important spur for innovation.

* ***Breakdown by company category:***

Generally speaking, “response to consumer needs” seems to be a particularly important spur to innovate for:

- large companies “250+”;
- companies in the services sector and/or
- more recently established (“0-10” years)

Company managers that are more inclined to consider “product competition” to be the driving force for innovation for their company are more often:

- larger in size;
- in industry, and/or
- engaged in exports

Companies that are more likely to be pushed to innovate by “price competition” are more often:

- medium-sized SMEs (“50-249”);
- companies in construction, and/or
- established for at least 11 years

Endogenous factors stemming from the “need to improve the productivity level of personnel” and the “efficiency of machinery and equipment” seem to spur SMEs more so than large companies. The former seems to be more of a motivator for companies in construction compared to other sectors of activity while the latter pushes companies in industry to innovate.

1.4 Nous aimerions savoir quels sont, dans votre entreprise les deux principaux besoins en matière d'innovation non satisfaits, parmi les suivants... ? [DEUX REPONSES ATTENDUES]

1.4 We would like to know what are the two most important unsatisfied needs in terms of innovation in your company, amongst the following ...? [TWO ANSWERS EXPECTED]

	accéder aux marchés innovants / accessing innovative markets	mobiliser RH / mobilising HR	utiliser de nouvelles technologies / using new technologies	mobiliser des ress. financières/ mobilising financial resources	partager ses connaissances ou coopérer / knowledge sharing or networking	protéger vos connaissances / protecting your knowledge	[aucun de ces besoins mais plutôt] / [none of these, but this one is]	[aucun besoin n'est + imp. que autres] / [no need more important than other]	BASE
EU 15	37%	35%	28%	26%	23%	16%	1%	5%	2850
ITALIA	52%	32%	32%	21%	26%	14%	0%	3%	299
NEDERLANDS	49%	22%	38%	23%	33%	9%	0%	1%	193
FRANCE	42%	48%	24%	21%	13%	7%	2%	5%	292
PORTUGAL	41%	27%	26%	30%	16%	15%	0%	5%	96
IRELAND	38%	32%	26%	29%	31%	20%	1%	1%	93
SWEDEN	37%	46%	30%	17%	18%	11%	3%	1%	177
BELGIQUE	37%	31%	37%	20%	27%	20%	0%	0%	178
ESPANA	37%	30%	27%	20%	19%	9%	1%	11%	287
UNITED KINGDOM	36%	48%	27%	27%	18%	21%	1%	6%	276
LUXEMBOURG	36%	43%	36%	25%	14%	8%	1%	0%	99
ELLAS	33%	40%	25%	48%	9%	5%	0%	2%	98
FINLAND	31%	44%	29%	35%	31%	6%	0%	2%	98
DANMARK	30%	33%	22%	24%	33%	16%	1%	3%	190
DEUTSCHLAND	27%	29%	29%	32%	29%	23%	1%	2%	288
OSTERREICH	23%	17%	22%	26%	15%	12%	3%	22%	186
SECTEURS - SECTORS									
industrie - industry	43%	31%	29%	26%	19%	15%	1%	5%	939
construction	30%	39%	27%	27%	20%	13%	1%	4%	355
trade - commerce	38%	36%	28%	21%	22%	13%	1%	6%	664
services	34%	36%	29%	26%	27%	13%	1%	4%	892
TAILLES ENTR.-BUSINESS SIZES									
SME 20-49	38%	35%	28%	25%	21%	14%	1%	5%	1813
SME 50-49	37%	35%	30%	26%	24%	11%	1%	6%	619
MAJORS 250+	38%	34%	28%	19%	27%	15%	1%	6%	418
EXISTE DEPUIS - ACTIVE SINCE									
+30ans / + 30years	40%	34%	29%	24%	23%	12%	1%	6%	1484
11-30ans / 11-30 years	36%	34%	29%	24%	22%	15%	1%	4%	925
0-10ans / 0-10 years	32%	38%	27%	31%	21%	15%	1%	4%	437
EXPORTS %									
Rien / None	34%	39%	27%	25%	23%	12%	1%	5%	1382
Moins de 50% / Less than 50%	39%	33%	31%	25%	21%	14%	1%	5%	956
Supérieur ou égal à 50% / More than or equal to 50%	48%	26%	28%	27%	22%	16%	2%	3%	424

2.2 Unsatisfied needs of companies in terms of innovation

- Accessing innovative customers or markets is the top most unsatisfied need -

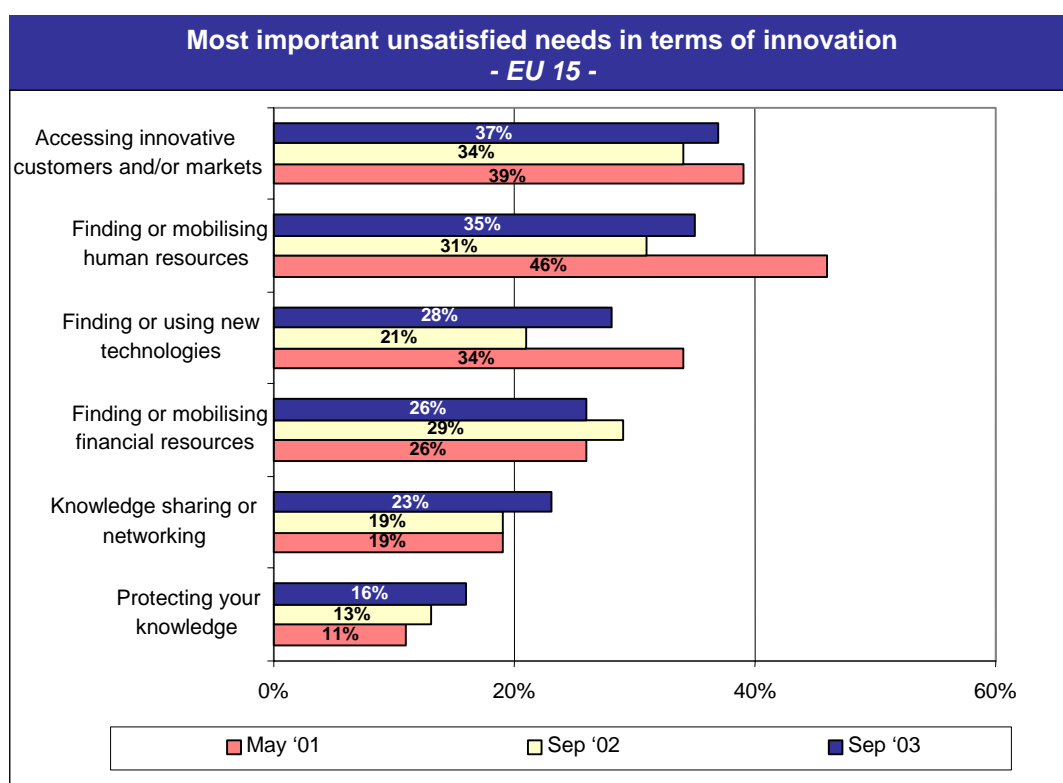
* Overall picture:

This question is almost identical to that posed in the previous two waves of the survey and so should allow us to trace any changes in priorities of the most important unsatisfied needs for innovation. As mentioned in the introduction, in comparing our results here it is worth recalling the economic climate at the time of each wave.

As for the last two years, there is not one but rather several needs to be satisfied in terms of innovation within companies. The ranking order of the top two unsatisfied needs is the same as in September 2002 but has reversed since the question was first asked in May 2001. "Accessing innovative customers and/or markets," (37%) seems to be considered the most unsatisfied need in terms of innovation in companies within the European Union and "finding or mobilising human resources" is second with 35%.

Compared to last year, a reversal has taken place on positions three and four, resuming the order observed in 2001: "finding or using new technologies" (28%; +7 points) is now considered more important than "finding or mobilising financial resources" which dropped from 29% in the previous wave to 26% in 2003.

A possible reason for these two reversals could be the general decline in interest rates throughout the European Union resulting in increased accessibility to funds. A somewhat more worrying trend is the increasing difficulties that companies encounter in finding or using new technologies. We will further explore this point in the next section.

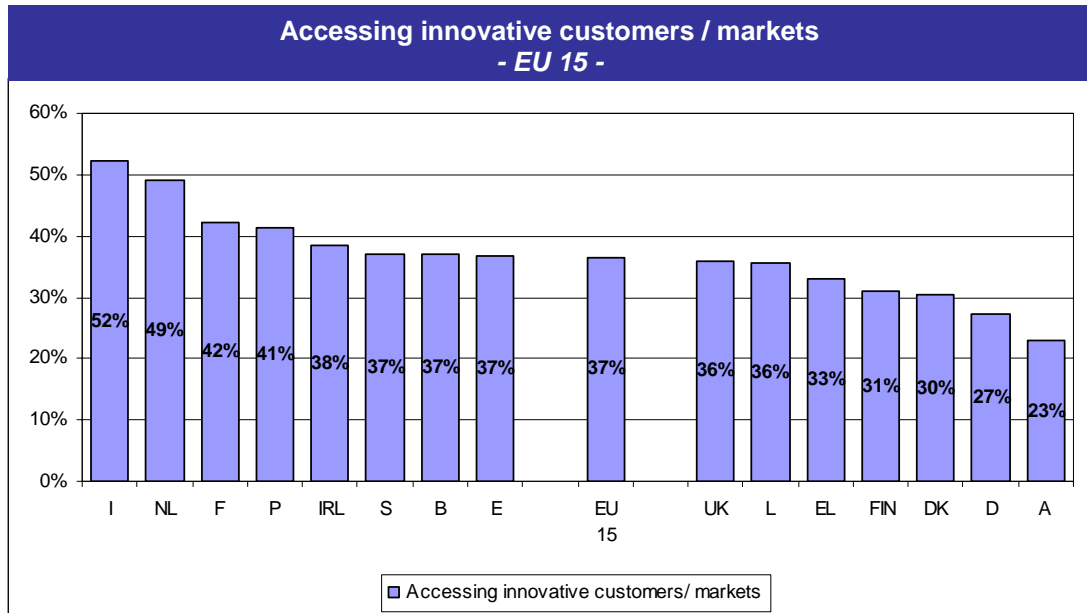


Flash EB 144 – September 2003 – Fig.4A

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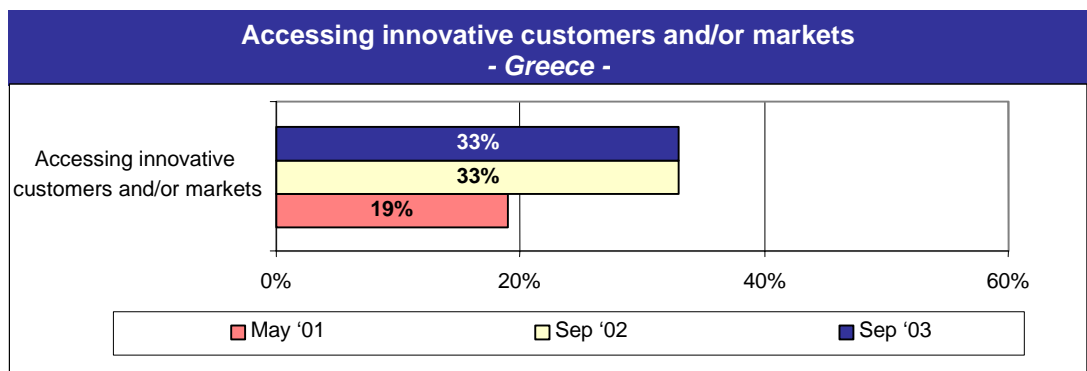
Breakdown by country:

“Accessing innovative customers and/or markets” is the most important “unsatisfied need” for managers in six Member States and ranks second in four countries. It is of greatest concern in companies in **Italy** (52%; +13 points), the **Netherlands** (49%; +8 points), **France** (42%; more or less static since May 2001) and **Portugal** (41%; +17 points).



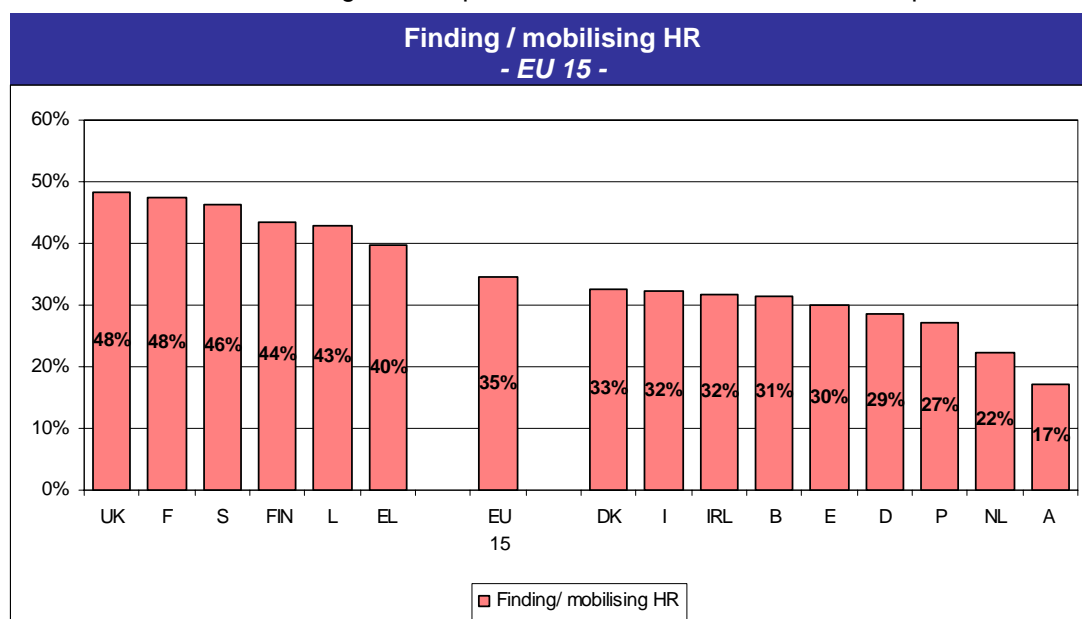
Flash EB 144 – September 2003 – Fig.4B

The evolution of the results over the three waves of this study shows that the greatest overall rise occurred in **Greece** (+14 points since May 2001), yet the results here remained static between September 2002 and 2003.



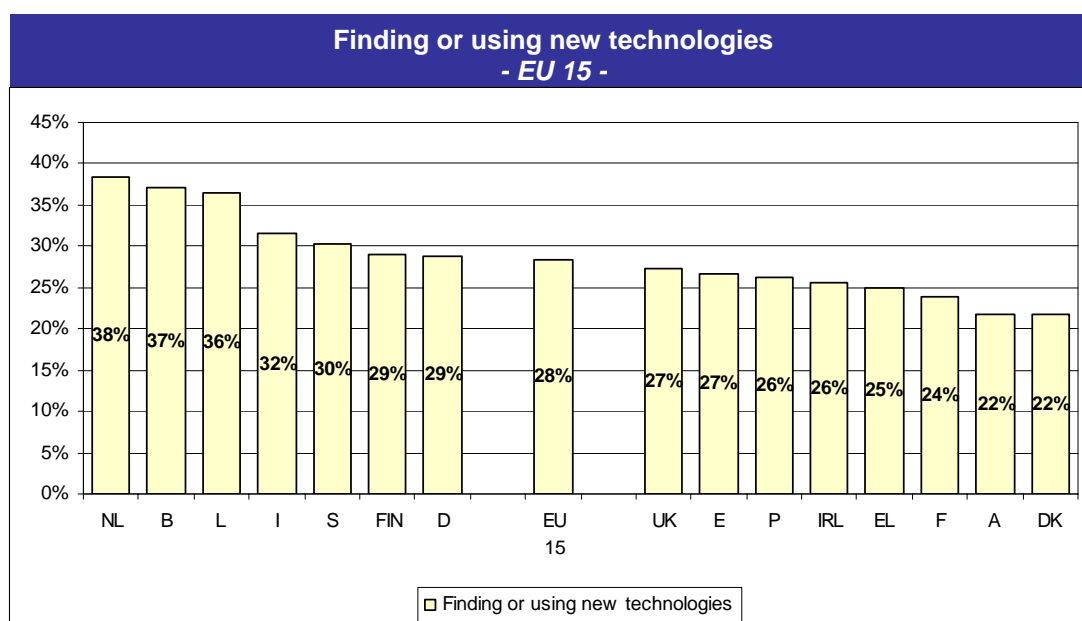
Flash EB 144 – September 2003 – Fig.4C

“Finding or mobilising human resources” is cited in six Member States as being the most important unsatisfied need for innovation and ranks second in six. It is viewed as most problematic in **France** (48%; static since May 2001) and the **United Kingdom** (48%; -9 points since May 2001) but not significant at all in the **Netherlands** (similar to the result in May 2001) and **Austria**. Since May 2001, in **Austria** and most other Member States there has been an overall drop in the proportion of companies claiming that human resources is one of the top two most important unsatisfied needs. As mentioned in the introduction, this could be explained by the downturn in the economy since this question was first asked. In periods of economic growth, human resources are more difficult to access whereas in difficult economic periods, many find themselves on the job market and hence the task of finding suitable personnel is somewhat easier for companies.



Flash EB 144 – September 2003 – Fig.4D

“Finding or using new technologies” is most problematic in the **Netherlands** (38%), **Belgium** (37%) and **Luxembourg** (36%). Since May 2001, the country results remained static or declined with the exception of **Luxembourg**, **Sweden** and **Spain**.



Flash EB 144 – September 2003 – Fig.4E

Compared to all other unsatisfied needs “finding or mobilising financial resources,” ranks as the most important unsatisfied need for managers in **Germany** (as was the case in 2002), being the case for 32% of those interviewed in this latest survey. However, this appears to be considerably less widespread compared to last year, as the result dropped by 9 points. This unsatisfied need has become dramatically more significant in **Greece** since September of last year (+17 points) and is now the most important unsatisfied need in terms of innovation for 48% of companies (a drop of 8 points between May 2001 and September 2002 preceded this latest evolution).

Company managers in **Denmark** and the **Netherlands** emphasise “knowledge sharing or networking” (33% in both) along with their counterparts in **Ireland** and **Finland** (31% in both). Since May 2001, there has been an upward tendency in the **Irish** result over the three waves of this study. Whereas in **Denmark** the results rose sharply between May 2001 and September 2002 yet remained static in this latest survey. It should be noted that the wording of this item was modified slightly in 2002. “Protecting your knowledge” is rated highest in **Germany** (23%; +6 points) and the **United Kingdom** (21%; +7 points). More recently, this has become much less of an issue for companies in the **Netherlands**, as the result here dropped by 11 points since September 2002 subsequent to a slight increase between May 2001 and September 2002.

*

Breakdown by company category:

There are no major differences to report: attitudes with respect to unsatisfied needs for innovation are quite similar for most groups of enterprises.

The following tendencies are worth mentioning:

- As was the case in 2001, in the industrial sector, enterprises are more concerned about innovative markets;
- Large exporters, more than other exporting categories are interested in accessing innovative markets. As was revealed in 2002 they are less concerned about human resources;
- Enterprises established for less than 10 years, are most concerned about financial resources, confirming the tendency revealed last year.

1.5 Chacun des moyens suivants peuvent être appropriés pour que votre entreprise accède aux technologies de pointe. Pour chacun de ces moyens, pourriez-vous juger de quelle manière cela est satisfaisant ou insatisfaisant pour accéder aux technologies de pointe?

1.5 Each of the following means may be of relevance to your company in accessing advanced technologies. For each of these means, could you rate how satisfactory or unsatisfactory it is in accessing advanced technologies?

plutôt satisfaisant / rather satisfactory

	b) collaboration avec des fournisseurs ou clients / cooperation with suppliers or customers	a) l'acquisition d'équip. de pointe / acquisition of advanced equip.	c) R&D en interne / in-house R&D	d) collaboration avec des univ. ou spécial. de R&D / co-op. with univ. or R&D specialists	e) l'acquisition de propriété intel. / acquisition of intellectual property
EU 15	86%	64%	52%	28%	29%
OSTERREICH	93%	70%	50%	26%	23%
UNITED KINGDOM	92%	62%	60%	33%	41%
IRELAND	90%	59%	52%	17%	30%
NEDERLANDS	89%	56%	43%	31%	24%
BELGIQUE	88%	71%	56%	27%	28%
FINLAND	88%	70%	57%	26%	17%
DEUTSCHLAND	86%	57%	43%	25%	26%
ELLAS	83%	81%	51%	33%	32%
ESPANA	83%	82%	57%	39%	35%
LUXEMBOURG	83%	80%	55%	21%	32%
FRANCE	82%	63%	60%	18%	28%
ITALIA	81%	76%	61%	33%	24%
PORTUGAL	80%	70%	49%	25%	21%
SWEDEN	78%	47%	32%	30%	24%
DANMARK	75%	56%	40%	27%	30%
SECTEURS - SECTORS					
industrie - industry	85%	70%	64%	37%	26%
construction	85%	74%	44%	21%	25%
trade - commerce	82%	55%	47%	24%	30%
services	89%	63%	48%	26%	32%
TAILLES ENTR.-BUSINESS SIZES					
SME 20-49	86%	65%	49%	25%	27%
SME 50-49	83%	62%	58%	33%	32%
MAJORS 250+	86%	65%	65%	43%	37%
EXISTE DEPUIS - ACTIVE SINCE					
+30ans / + 30years	85%	65%	52%	28%	28%
11-30ans / 11-30 years	85%	66%	52%	27%	29%
0-10ans / 0-10 years	89%	60%	53%	30%	31%
EXPORTS %					
Rien / None	86%	64%	46%	23%	29%
Moins de 50% / Less than 50%	86%	66%	57%	32%	29%
Supérieur ou égal à 50% / More than or equal to 50%	83%	61%	70%	42%	27%

2.3 Accessing advanced technologies

- Co-operation with suppliers or customers is highly rated by managers; traditional impetuses such as research could be further improved -

*

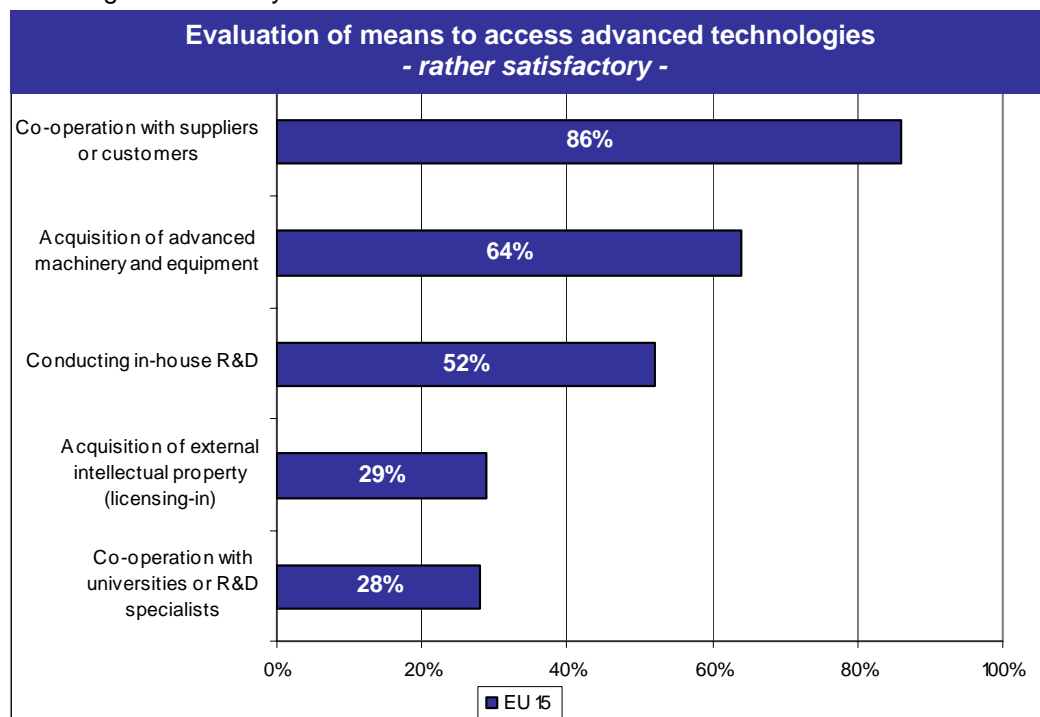
Overall picture:

In the previous section (subsection 2.2) we saw that companies are encountering more difficulties in finding or using new technologies compared to one year ago. In this question, a series of means of accessing advanced technologies were put to managers who were asked to indicate the extent to which each was satisfactory for their company.

In its recent Communication⁵ the European Commission recognises the importance of research but encourages policy-makers to look to other impetuses for innovation. On this note we can see that company managers in the European Union are already exploring such paths and appear to be quite satisfied with “co-operation with suppliers or customers” as a means of accessing advanced technologies with 86% finding this means to be “rather satisfactory”.

Capital investment through the acquisition of advanced machinery and equipment appears to be a rather reliable means of accessing advanced technologies as 64% of managers find this to be “rather satisfactory”.

In the graph below we can see that in-house Research and Development ranks third with 52% of managers in the European Union confirming that this is a rather satisfactory means for their company to access advanced technologies. This result is somewhat encouraging as it proves that one in two companies still give credit to conducting in-house R&D. The bridge between the world of academics and business appears to be somewhat questionable as only 28% of company managers find this a “rather satisfactory” means of accessing advanced technologies. Overall these results could be interpreted as an indicator of the “intentions” of companies with regard to innovation: if companies are satisfied with a particular means they are quite likely to continue accessing advanced technologies in this way.



Flash EB 144 – September 2003 – Fig.5A

⁵ COM (2003) 112 final « Innovation policy : updating the Union's approach in the context of the Lisbon strategy »

* **Breakdown by country:**

In each Member State more managers confirm that they find “cooperation with suppliers or customers” to be a “rather satisfactory” means of accessing advanced technologies compared to any other of the means cited in this question. The levels of satisfaction here are particularly high, ranging from 93% in **Austria** and 92% in the **United Kingdom** to 75% in **Denmark**.

The “rather satisfactory” results for “acquisition of advanced machinery and equipment” ranges from 82% in **Spain** and 81% in **Greece** to 47% in **Sweden**.

“In-house R&D” appears to be quite a satisfactory means of accessing advanced technologies for companies in **Italy** (61%), **France** (60%), the **United Kingdom** (60%), **Finland** (57%), **Spain** (57%) and **Belgium** (56%). At the other end of the scale, in **Sweden** less than one in three managers find this to be a “rather satisfactory” means of accessing advanced technologies.

As regards technology transfer by way of contract research (co-operation with universities and R&D specialists), there are some differences between countries, reflecting the diversity of structures in the various Member States. According to the results of the present survey, **Spain** is the country where this seems to be a comparatively satisfactory means of accessing advanced technologies (39% stated “rather satisfactory”). On the contrary, in **Ireland** (17%) and **France** (18%) a small proportion of company managers find this to be a “rather satisfactory” means of accessing advanced technologies. Generally, it would seem that this means of accessing advanced technologies should be improved as less than one in three managers in most Member States (with the exception of **Spain**) find this to be “rather satisfactory”.

“Acquisition of external intellectual property” as a means of accessing advanced technologies is given highest appraisal by managers in the **United Kingdom** (41%).

* **Breakdown by company category:**

The breakdown by company category shows some significant differences.

Generally speaking, “R&D” (both in-house and in co-operation with universities and specialists) is a satisfactory means of accessing advanced technologies for:

- companies in industry,
- exporting companies, or above all,
- large companies with 250 or more employees (majors)

It is not surprising that R&D (in-house or outsourced) is most significant in large companies (250+) given the fact that they most certainly have more resources and greater financial means. Similarly, the “acquisition of external intellectual property” appears to be more satisfactory for large companies (probably due to the same reason).

“Co-operation with suppliers or customers” appears to be a satisfactory means of accessing advanced technologies for companies in services or more recently established (less than 10 years).

2.1 En ce qui concerne l'expérience de votre entreprise en matière d'innovation, pouvez-vous me dire si vous êtes plutôt satisfait ou plutôt insatisfait du soutien des institutions ou organisations suivantes ?

2.1 In terms of your company's experience in innovation, could you tell me if you are rather satisfied or rather dissatisfied with the support of the following institutions or groups?

plutôt satisfait / rather satisfied

	votre personnel / your staff	les comptables/ accountants	les banques / banks	les assoc. prof / prof assoc.	chambres de comm/ chambers of com.	les compagnies d'assurance / insurance comp.	les autorités nationales / national authorities	les org. natio. qui délivrent les brevets / national bodies granting patents	les institutions européennes / European Institutions	les syndicats / trade unions
EU 15	88%	69%	56%	50%	49%	47%	33%	22%	19%	18%
BELGIQUE	95%	87%	73%	68%	54%	55%	39%	24%	18%	26%
ESPANA	93%	74%	59%	60%	44%	43%	41%	27%	26%	27%
SWEDEN	92%	75%	64%	66%	20%	44%	25%	29%	17%	48%
NEDERLANDS	90%	68%	58%	53%	62%	38%	30%	16%	15%	21%
IRELAND	89%	81%	66%	68%	54%	21%	46%	27%	32%	26%
OSTERREICH	89%	79%	70%	36%	59%	59%	43%	10%	13%	15%
UNITED KINGDOM	89%	78%	76%	68%	54%	59%	45%	31%	23%	23%
DANMARK	88%	77%	63%	55%	16%	43%	30%	11%	11%	19%
DEUTSCHLAND	87%	57%	42%	36%	43%	50%	28%	19%	14%	6%
ITALIA	87%	74%	52%	53%	57%	41%	31%	19%	24%	29%
FRANCE	86%	70%	56%	53%	55%	36%	26%	21%	15%	18%
FINLAND	84%	73%	67%	17%	40%	57%	44%	14%	9%	27%
LUXEMBOURG	82%	61%	65%	63%	75%	58%	68%	25%	20%	40%
ELLAS	81%	83%	70%	47%	57%	55%	35%	15%	21%	30%
PORTUGAL	80%	81%	58%	47%	30%	45%	36%	22%	27%	22%
SECTEURS - SECTORS										
industrie-industry	87%	66%	51%	46%	50%	34%	34%	32%	22%	19%
construction	88%	71%	54%	62%	54%	55%	31%	21%	12%	24%
trade - commerce	88%	72%	59%	51%	50%	48%	32%	20%	17%	19%
services	88%	70%	59%	49%	45%	55%	35%	14%	19%	15%
TAILLES ENTR.-BUSINESS SIZES										
SME 20-49	89%	70%	57%	50%	49%	49%	32%	21%	17%	17%
SME 50-49	85%	70%	53%	51%	49%	44%	37%	23%	23%	20%
MAJORS 250+	90%	65%	50%	48%	39%	34%	37%	33%	28%	27%
EXISTE DEPUIS - ACTIVE SINCE										
+30ans / + 30years	88%	69%	57%	53%	52%	45%	32%	22%	18%	20%
11-30ans / 11-30 years	88%	70%	56%	49%	45%	49%	33%	21%	20%	16%
0-10ans / 0-10 years	88%	70%	53%	45%	48%	50%	36%	22%	20%	19%
EXPORTS %										
Rien / None	87%	72%	59%	54%	48%	53%	33%	15%	15%	20%
Moins de 50% / Less than 50%	88%	67%	51%	46%	50%	40%	32%	27%	21%	16%
Supérieur ou égal à 50% / More than or equal to 50%	91%	66%	54%	44%	47%	36%	36%	35%	30%	17%

2.4 Support of parties implicated in the innovative effort

- Personnel are highly supportive of the innovative efforts of their company -

* Overall picture:

Businesses rely on a number of different actors throughout the entire process of the innovative effort. In this question we look at how managers evaluate their respective experiences with some of the parties that could potentially be called upon by companies engaging in innovative activities.

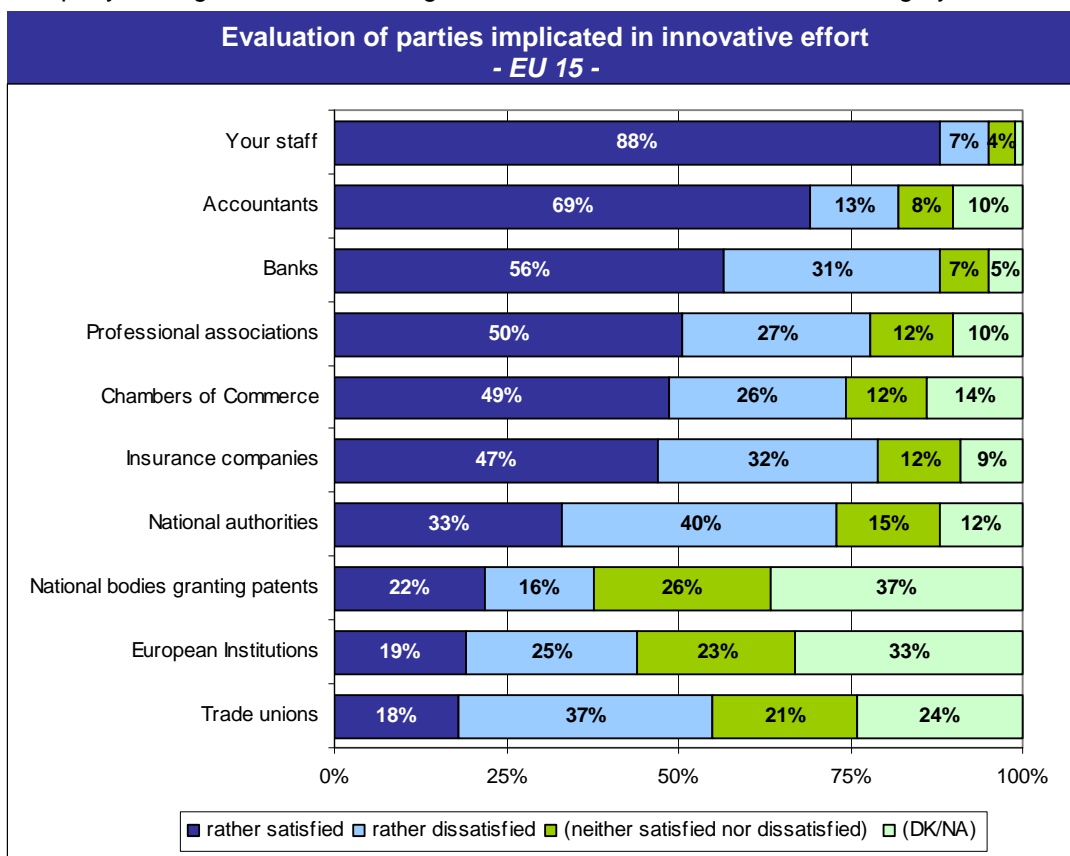
It seems that companies have secured exceptionally high levels of support from their "staff" (88%). This result is very encouraging and shows that executives are taking the human factor into consideration when introducing technological, process-related or organisational changes in their business. This result is certainly reassuring as the success of the innovative effort relies on the support or "buy-in" of staff.

The support of financial players such as "banks" (56%) and "accountants" (69%) is often necessary before launching the project and the majority of managers are "rather satisfied" with their level of support. "Insurance companies" also appear to offer satisfactory levels of support with 47% of managers indicating that they are "rather satisfied".

One in two managers appear to be satisfied with the support of both "professional associations" and "chambers of commerce".

It would seem that a significant proportion of managers are unaware of the efforts made at the European level in promoting innovation. One in three managers either didn't know or simply could not evaluate the support of "European Institutions". This signals the need for a more widespread dissemination of information on European innovation policy throughout the EU.

The role of "national bodies granting patents" is unclear for a considerable proportion of company managers with 37% falling under the "don't know/no answer" category.



* **Breakdown by country:**

The high levels of support from staff throughout the innovative effort is evident in each and every Member State with results ranging from 95% in **Belgium** to 80% in **Portugal**.

The range of results across Member States is somewhat more disparate when it comes to evaluating the performance of “banks”. More company managers in the **United Kingdom** (76%) are “rather satisfied” with their support than any other Member State while in **Germany**, 50% of managers are “rather dissatisfied” with their support. This point echoes a result previously revealed in **Germany**, namely, that “finding or mobilising financial resources” ranks as the most important unsatisfied need in terms of innovation (section 2.2).

The presence and actions of “chambers of commerce” and “professional associations” across Member States is clearly diverse. The “rather satisfied” results for “chambers of commerce” range from 75% in **Luxembourg** to 16% in **Denmark** and 20% in **Sweden**. In **Belgium, Ireland** and the **United Kingdom**, 68% of company managers confirm that they are “rather satisfied” with the interventions of “professional associations” in the innovative effort compared to only 17% in **Finland**. A significantly high proportion of company managers in **Germany** claim to be dissatisfied with the support of both “chambers of commerce” (43%) and “professional associations” (50%).

The perceptions of the support of the “European Institutions” varies from 32% of company managers in **Ireland** stating that they are “rather satisfied” to 9% in **Finland** confirming that they are “rather satisfied”. In most Member States there appears to be particularly high levels of uncertainty regarding the role of European Institutions in innovation and in the **United Kingdom, Portugal, the Netherlands** and **Belgium** close to one in two are unable to give an answer.

There also appears to be high levels of uncertainty about the support of “national bodies granting patents”, particularly so in the **Netherlands, Belgium, the United Kingdom** and **Portugal** with a majority of companies unable to give an answer. This may be due to the fact that patents may be irrelevant for the types of innovation that these companies are investing in or, it could be that they are unaware of how the process works. In **Greece, Germany, Spain** and **France** at least one in five managers claim to be dissatisfied with the support of “national bodies granting patents”. Later in our analysis (subsection 5.1) we will again raise the issue of patents where managers give their perception of the effectiveness of a Community Patent.

* **Breakdown by company category:**

A similar tendency is revealed for “chambers of commerce” and “professional associations”. In the case of both of these, companies in construction or those who have been established for more than 30 years are more inclined to be satisfied with their support.

Companies in trade or services, small SMEs and/or non-exporting companies are more likely to confirm that they are “rather satisfied” with their experiences with banks.

Large companies (250+) as well as companies in industry are more likely to be positive regarding the support of the European Institutions and national bodies granting patents.

1.6 Comparé à il y a deux ans, considérez-vous que la capacité de votre entreprise à innover...?

1.6 Compared to two years ago, do you consider that your company's capacity to innovate is...?

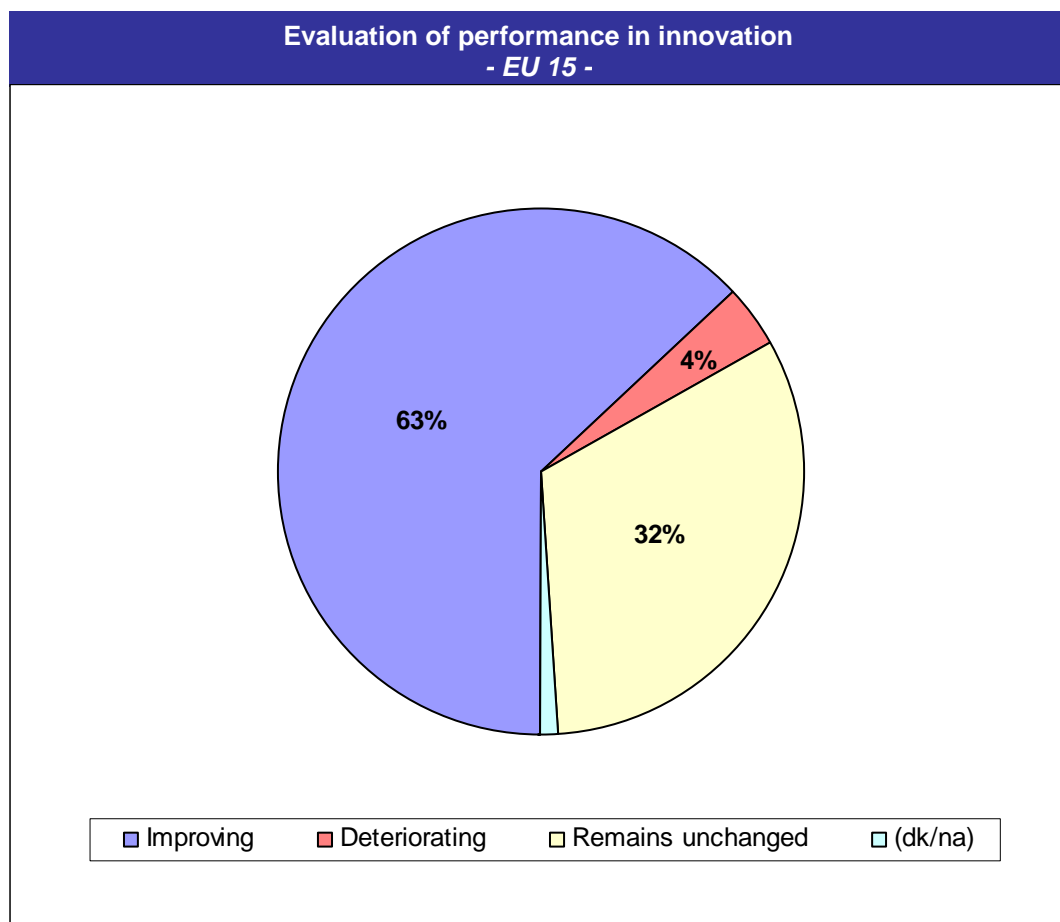
	s'est améliorée / improving	s'est détériorée / deteriorating	est restée identique / remains unchanged	(NSP&SR) / (DK&NA)	BASE
EU 15	63%	4%	32%	1%	3010
ITALIA	78%	1%	22%	0%	300
ELLAS	76%	6%	18%	0%	100
ESPANA	76%	3%	21%	0%	300
IRELAND	72%	3%	26%	0%	99
SWEDEN	70%	3%	27%	0%	200
PORTUGAL	68%	1%	27%	3%	100
DANMARK	66%	3%	31%	0%	203
LUXEMBOURG	63%	4%	33%	0%	100
UNITED KINGDOM	62%	5%	33%	1%	300
BELGIQUE	59%	6%	35%	0%	200
DEUTSCHLAND	59%	4%	35%	2%	300
FRANCE	56%	7%	36%	0%	300
FINLAND	51%	3%	44%	1%	100
NEDERLANDS	48%	6%	44%	2%	208
OSTERREICH	44%	8%	44%	3%	200
SECTEURS - SECTORS					
industrie - industry	61%	4%	34%	1%	891
construction	66%	3%	31%	0%	374
trade - commerce	62%	4%	33%	1%	701
services	65%	5%	29%	1%	1044
TAILLES ENTR.-BUSINESS SIZES					
SME 20-49	62%	5%	32%	1%	2178
SME 50-49	66%	2%	31%	0%	677
MAJORS 250+	69%	4%	27%	0%	155
EXISTE DEPUIS - ACTIVE SINCE					
+30ans / + 30years	61%	4%	34%	0%	1392
11-30ans / 11-30 years	64%	4%	32%	0%	997
0-10ans / 0-10 years	66%	4%	26%	4%	619
EXPORTS %					
Rien / None	62%	4%	33%	1%	1569
Moins de 50% / Less than 50%	65%	6%	29%	1%	978
Supérieur ou égal à 50% / More than or equal to 50%	60%	3%	37%	0%	339

2.5 Overall performance measurement

- The innovation performance of companies is improving -

* **Overall picture:**

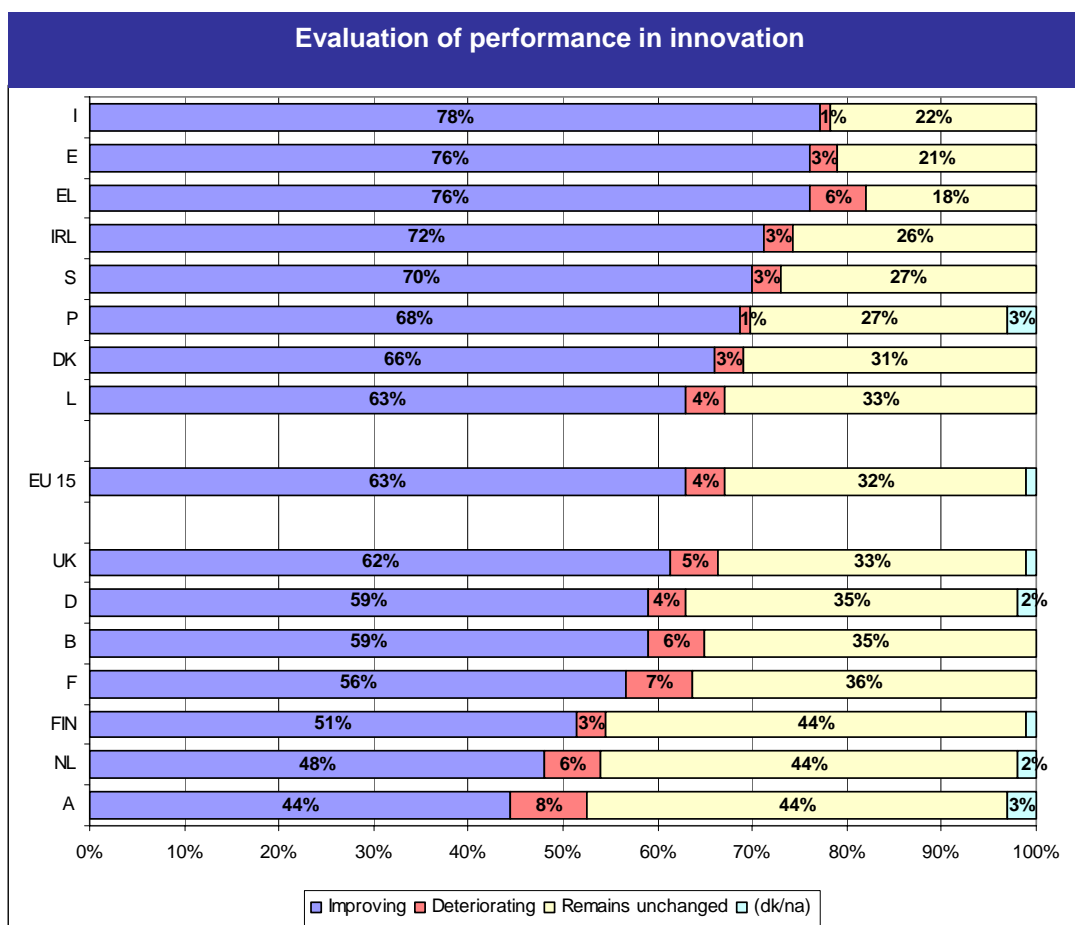
In this question managers were asked to indicate the extent to which they felt that their company's capacity to innovate was improving. From the graph below we can see that the majority of managers in the European Union (63%) are optimistic about the improvement in their performance over the last two years. This result would seem to be in line with the objective of moving towards a more innovative European economy. However in spite of this optimistic mood, we should not lose sight of the fact that the Commission's European Innovation Scoreboard in 2002 confirms that the innovation performance of the EU is still low compared to its main global competitors.⁶



Flash EB 144 – September 2003 – Fig.7A

⁶ SEC (2002) Commission Staff Working Paper « 2002 European Innovation Scoreboard »

* **Breakdown by country:**



Flash EB 144 – September 2003 – Fig.7B

It seems that three of the Mediterranean countries, **Italy** (78%), **Spain** (76%) and **Greece** (76%) are most optimistic about the progress in their performance in innovation over the last two years. In the **Netherlands** (48%) and **Austria** (44%) less than one in two managers are confident that their performance in innovation has improved over that period.

* **Breakdown by company category:**

The distinction between company categories is less clear-cut for this question. The size of the company bears some influence in the extent to which performance is perceived as improving: as the company size increases so does the perception of improvement in performance in innovation.

3.1 Au cours des deux prochaines années, sur quelles nouvelles approches de gestion de l'innovation votre entreprise se concentrera-t-elle principalement parmi les suivantes? Premièrement? Deuxièmement?

3.1 During the next two years, on which of the following new approaches to management of innovation will your company mainly focus? Firstly? Secondly?

Premièrement / Firstly

	relations avec les fourniss., util. / relationship with suppliers, users	nouv. caract. des produits, services / new product, service charac.	traitement des données et de l'info / data & info processing	nouv. processus tech./ new process technologies	la logistique, la méthode de livraison / logistics, delivery method	processus prise de décision / decision- making process	(NSP&SR) / (DK&NA)	BASE
EU 15	23%	21%	16%	15%	12%	10%	3%	3010
FINLAND	33%	20%	15%	11%	14%	7%	0%	100
SWEDEN	33%	9%	21%	7%	19%	5%	5%	200
NEDERLANDS	30%	15%	25%	9%	11%	7%	3%	208
DEUTSCHLAND	29%	24%	17%	13%	6%	9%	2%	300
IRELAND	28%	23%	17%	8%	7%	13%	2%	99
UNITED KINGDOM	26%	21%	14%	12%	9%	12%	5%	300
DANMARK	22%	14%	17%	10%	21%	11%	4%	203
OSTERREICH	22%	28%	8%	12%	11%	8%	12%	200
LUXEMBOURG	19%	9%	22%	23%	17%	9%	2%	100
ESPANA	17%	22%	18%	17%	16%	7%	3%	300
PORTUGAL	17%	13%	12%	23%	15%	12%	8%	100
BELGIQUE	15%	27%	16%	13%	16%	11%	2%	200
FRANCE	15%	16%	22%	14%	19%	9%	5%	300
ITALIA	15%	22%	10%	23%	16%	13%	1%	300
ELLAS	8%	18%	13%	37%	11%	10%	2%	100
SECTEURS - SECTORS								
industrie-industry	18%	25%	14%	20%	12%	7%	3%	891
construction	28%	15%	16%	16%	9%	14%	2%	374
trade - commerce	28%	18%	15%	8%	20%	7%	4%	701
services	22%	21%	20%	14%	7%	13%	3%	1044
TAILLES ENTR.-BUSINESS SIZES								
SME 20-49	24%	21%	17%	14%	12%	10%	3%	2178
SME 50-49	20%	21%	14%	17%	12%	11%	4%	677
MAJORS 250+	16%	23%	20%	21%	10%	8%	3%	155
EXISTE DEPUIS - ACTIVE SINCE								
+30ans / + 30years	23%	20%	16%	15%	13%	10%	4%	1392
11-30ans / 11-30 years	20%	23%	18%	14%	13%	7%	3%	997
0-10ans / 0-10 years	26%	20%	15%	15%	8%	14%	2%	619
EXPORTS %								
Rien / None	25%	18%	18%	11%	11%	13%	3%	1569
Moins de 50% / Less than 50%	22%	23%	14%	19%	14%	7%	2%	978
Supérieur ou égal à 50% / More than or equal to 50%	18%	26%	17%	18%	12%	6%	4%	339

3. NEW ORGANISATIONAL AND MANAGERIAL APPROACHES

- Innovation fits into an overall strategy and is not only a specific independent improvement -

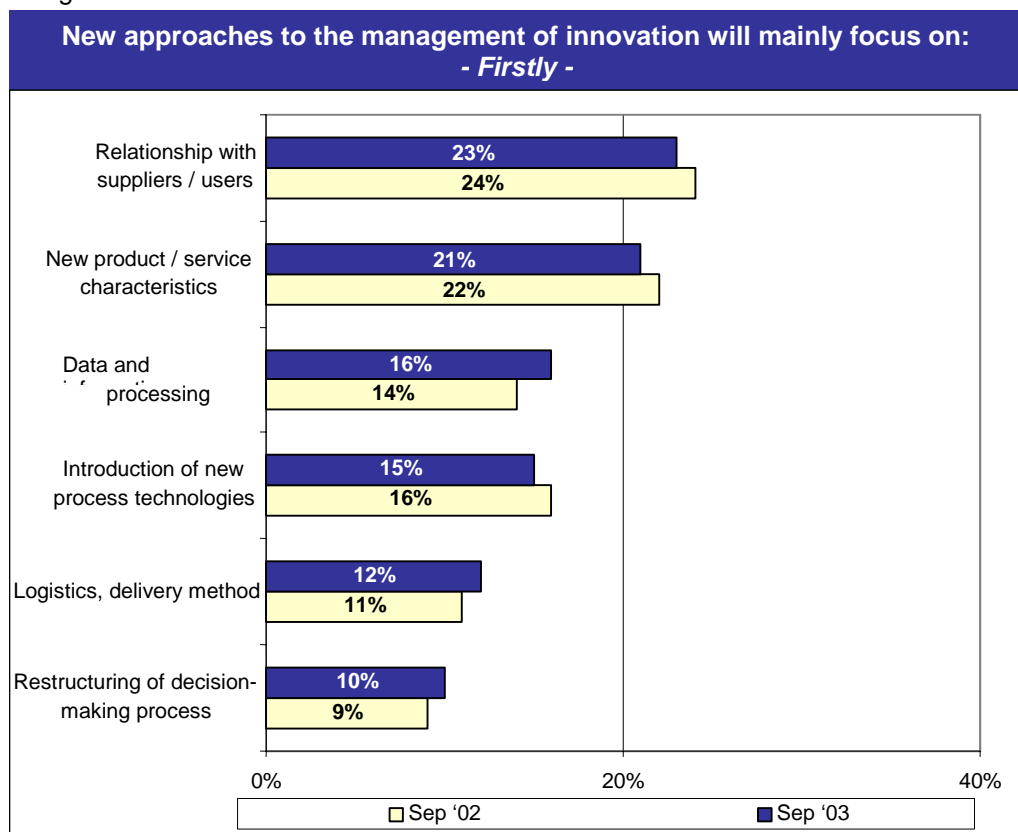
3.1. Focus of new approaches to management of innovation

* Overall picture:

Managers of companies in the European Union were asked to select and prioritise two approaches to management of innovation that their company will focus on over the next two years. It should be noted that the question wording was modified very slightly compared to when the question was first asked in September of last year. By taking the results for managers "first" choice, we have a clear hierarchy of their ranking order.

Strengthening their relationship with suppliers/users continues to rank as the first priority for 23% of managers (-1 point) in their new approaches to management of innovation. The free movement of goods and services is one of the major factors contributing to increased competition. Consequently, companies have a greater need to enhance their relationships with customers and suppliers and more and more companies are focusing on "Customer Relationship Management" and/or "Supply Chain Management".

The next most important area where respondents say that new approaches to the management of innovation should focus on is "new product/service characteristics", being cited by 21% of managers. This is followed by data and information processing" (16%; +2 points) and "introduction of new process technologies" (15%; -1 point). The ranking order for these two items has been reversed since September 2002. Close to one in ten managers selected "logistics, delivery method" and "restructuring of decision-making process" as a target business activity for their companies new approaches to management of innovation.



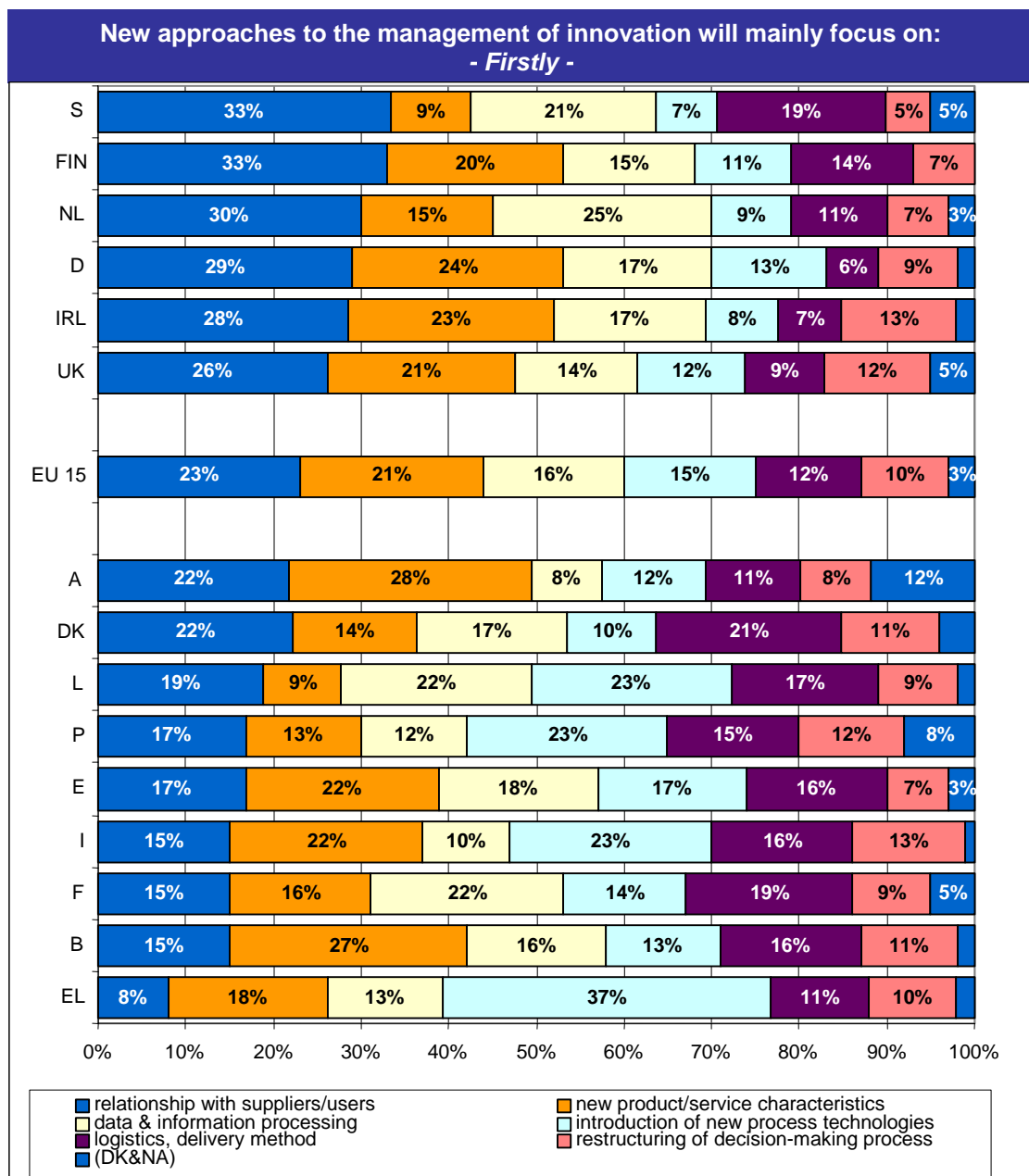
Flash EB 144 – September 2003 – Fig.8A

In analysing the “second” choice of those managers who selected “relationship with suppliers/users” as a prime target, an interesting interdependence that first emerged in September 2002 was confirmed in this latest study. Namely, that the “second” preference of many of these companies is “new product/service characteristics”, thereby complimenting their “first” choice, in that it is aimed at satisfying end user needs and expectations.

For companies giving priority to “new product/service characteristics”, a considerable proportion of managers stated as second priority the “introduction of new process technologies” (this confirms the findings in September 2002).

Alternatively, other companies selected “logistics, delivery method” as their “second” preference which again directly links back to their “first” choice, i.e. strengthening of relationship with suppliers/users. In other words, innovation can be perceived as an overall strategy and not only as a specific independent improvement. These observations are perfectly in line with what was highlighted in the previous wave of this study.

* **Breakdown by country:**



Flash EB 144 – September 2003 – Fig.8B

Managers of companies in **Sweden** (33%; +1 point) as well as in **Finland** (33%; +3 points), identify the strengthening of the relationship of their company with suppliers/users as a first priority for the next two years. In contrast, this is considerably less important in **Greece** (8%; -3 points).

In **Austria**, 28% (-3 points) of managers interviewed select “new product/service characteristics” as a top priority, while only 9% of executives in **Sweden** (-5 points) and **Luxembourg** (-16 points) would invest their efforts here.

“Data and information processing” can be singled out as a priority for new approaches to management of innovation in the **Netherlands** (25%; -7 points), **Luxembourg** (22%; +3 points) and **France** (22%; +1 point). In **Austria** only 8% of managers confirm their commitment over the next two years to this business activity, corresponding to a drop of 5 points in the past twelve months.

The “introduction of new process technologies” is of greatest importance for managers in another group of countries: **Greece** (37%; +5 points), **Italy** (-9 points), **Portugal** (-3 points) and **Luxembourg** (+8 points) (23% in all three).

Just over one in five top-level executives in **Denmark** confirm their commitment over the next two years to “logistics, delivery method” (identical to the result in September 2002). At the other end of the scale, only 6% of managers in the **Germany** prioritise this.

* **Breakdown by company category:**

The breakdown by company category reveals some interesting differences:

Regarding the priority given to the strengthening of the “relationship with suppliers/users” in its new approaches to the management of innovation, particular emphasis is given to this by companies:

- in the construction and trade sectors (as was the case last year),
- in small SMEs (20-49) (as in 2002) and/or
- more recently established companies (in existence for less than 10 years)

Companies that intend focusing their new approaches to the management of innovation on “new product/service characteristics” are most often:

- in industry and/or
- engaged in exporting (confirming the tendency revealed in 2002)

Once again exporting companies and/or those in industry stand out for their efforts in innovation.

As was revealed in 2002, companies that intend focusing their new approaches to the management of innovation on the “introduction of new process technologies” are more frequently:

- in industry,
- majors (250+) and/or
- exporting companies

3.2 Si vous souhaitez introduire de nouvelles méthodes ou de nouvelles approches de gestion dans votre entreprise, vous cherchiez de préférence conseil auprès de... ?

3.2 If you want to introduce new methods or new approaches to management for your company, would you seek advice preferably from... ?

	consultants ext privés / private ext. consultants	fournisseurs ou clients / suppliers or customers	instit. de recherche / research institutions	conseil publics ou semi-publics / public or semi- public advisory centres	BASE
EU 15	52%	32%	8%	8%	2798
ITALIA	67%	15%	9%	8%	295
DANMARK	63%	23%	3%	12%	183
IRELAND	62%	27%	3%	9%	92
ELLAS	58%	15%	21%	6%	94
OSTERREICH	57%	26%	4%	13%	169
DEUTSCHLAND	54%	31%	8%	7%	284
SWEDEN	53%	43%	3%	0%	193
ESPANA	52%	28%	11%	8%	288
PORTUGAL	51%	35%	3%	10%	85
FRANCE	50%	34%	8%	9%	277
LUXEMBOURG	49%	35%	6%	10%	98
FINLAND	48%	32%	11%	9%	96
BELGIQUE	45%	37%	11%	7%	185
UNITED KINGDOM	37%	49%	7%	8%	260
NEDERLANDS	35%	42%	12%	11%	191
SECTEURS – SECTORS					
industrie - industry	52%	30%	10%	7%	826
construction	48%	31%	10%	11%	349
trade - commerce	55%	36%	4%	6%	653
services	51%	32%	9%	9%	971
TAILLES ENTR.-BUSINESS SIZES					
SME 20-49	49%	33%	9%	9%	2015
SME 50-49	58%	32%	6%	5%	638
MAJORS 250+	64%	24%	7%	5%	146
EXISTE DEPUIS - ACTIVE SINCE					
+30ans / + 30years	52%	33%	7%	8%	1290
11-30ans / 11-30 years	54%	31%	7%	8%	926
0-10ans / 0-10 years	48%	33%	11%	8%	579
EXPORTS %					
Rien / None	50%	33%	8%	8%	1454
Moins de 50% / Less than 50%	53%	32%	8%	8%	918
Supérieur ou égal à 50% / More than or equal to 50%	55%	25%	14%	6%	312

3.2. Where to seek advice for new management approaches?

- Clear and consistent preferences with respect to the sources from which managers would seek advice -

* **Overall picture:**

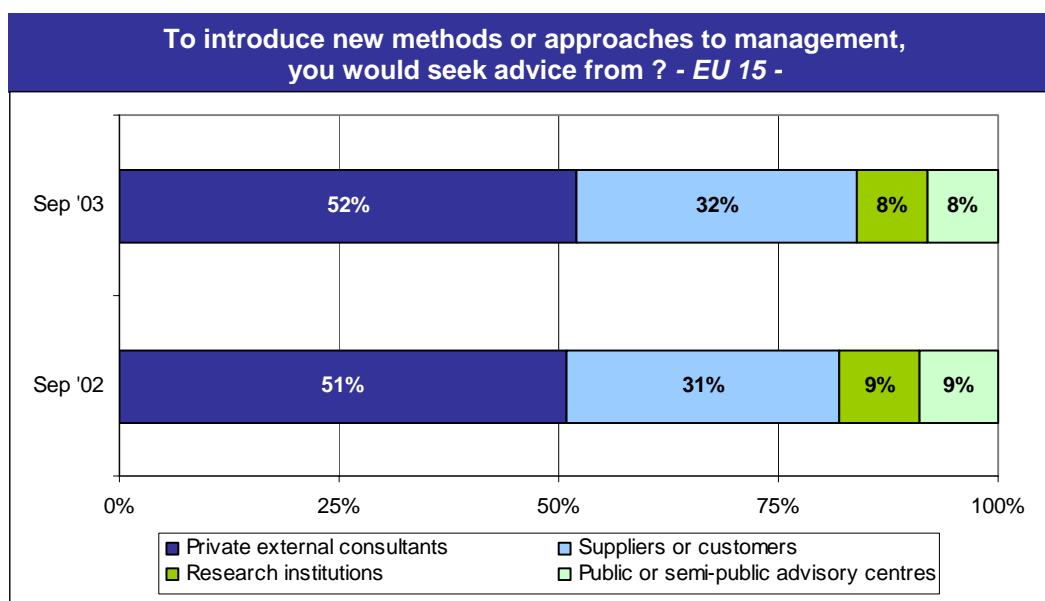
As in September 2002, managers once again expressed very clear preferences with respect to the partners from which they would seek advice for the introduction of new organisational and managerial approaches. As was the case last year, the “non-responses” have been extracted from the sample for the purposes of our analysis here.

In the European Union as a whole, 52% of the managers who gave an answer to this question would preferably seek advice from “private external consultants”.

32% of them would seek advice from their “suppliers or customers”.

In the opinions of managers interviewed, “research institutions” as well as “public or semi-public advisory centres” are definitively less attractive for advice when introducing new approaches to management.

As the graph below shows the results at the European Union level have remained static since September 2002.



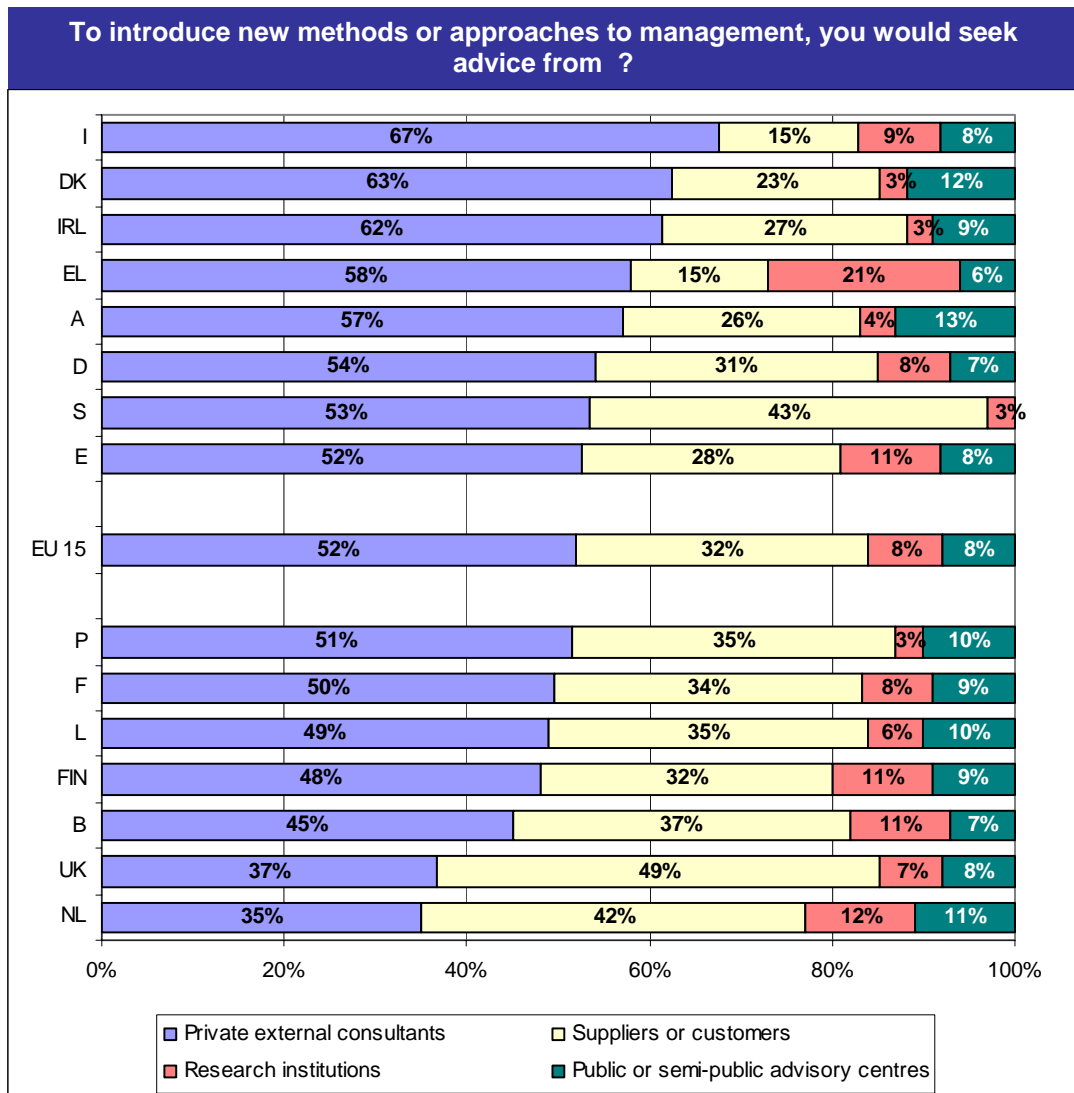
Flash EB 144 – September 2003 – Fig. 9A

*

Breakdown by country:

“Private external consultants” rank first as a source of advice when introducing new methods of management in all countries except in the **Netherlands** (35%; -9 points) and the **United Kingdom** (37%; -7 points).

The importance of supplier or customer relationships for the purpose of advice is greatest in the **United Kingdom** (49%; +13 points), **Sweden** (43%; +9 points) and the **Netherlands** (42%; +16 points).



Flash EB 144 – September 2003 – Fig.9B

“Public or semi-public advisory centres” appear to be a preferred source for such advice for around one in ten managers in **Austria** (13%; -1 point), **Denmark** (12%; +1 point), the **Netherlands** (11%; static), **Luxembourg** and **Portugal** (both 10%). In contrast, no company manager in **Sweden** seems to refer to “public or semi-public advisory centres” for such matters (as in 2002, only 2%).

“Research institutions” is a preferred source for advice on new approaches to management for one in five company managers in **Greece** (+11 points), while only 3% of managers in **Denmark**, **Sweden**, **Portugal** and **Ireland** would opt for this source.

* ***Breakdown by company category:***

Company characteristics do not appear to have any strong influence on the partner from which managers would seek advice in their innovative approaches to management

However, as was the case in 2002, private external consultants are most often called upon for advice on new approaches to management by "majors", exporting companies and/or companies in trade.

5.1 a) Pour chacune des propositions suivantes, pouvez-vous me dire si vous êtes tout à fait d'accord, plutôt d'accord, plutôt pas d'accord ou pas du tout d'accord ?... Comme le temps requis à partir de la conception et la production d'un nouveau produit ou service jusqu'à son lancement sur le marché devient de plus en plus court, les entreprises doivent continuer à accroître leurs efforts en matière d'innovation

5.1 a) For each of the following propositions, could you tell me if you totally agree, rather agree, rather disagree or totally disagree?... Since the time required from the conception and the production of a new product or service to its launch on the market is becoming shorter and shorter, companies should continue to increase their efforts in innovation

	tout à fait d'accord / totally agree	plutôt d'accord / rather agree	plutôt pas d'accord / rather disagree	pas du tout d'accord / totally disagree	(NSP&SR) / (DK&NA)	BASE
EU 15	48%	42%	6%	2%	3%	3010
DANMARK	73%	23%	1%	0%	2%	203
PORTUGAL	68%	28%	1%	1%	2%	100
SWEDEN	67%	17%	11%	2%	3%	200
ELLAS	61%	39%	0%	0%	0%	100
FINLAND	56%	35%	4%	2%	3%	100
DEUTSCHLAND	49%	40%	9%	0%	1%	300
LUXEMBOURG	49%	44%	8%	0%	0%	100
BELGIQUE	48%	40%	8%	2%	2%	200
FRANCE	48%	45%	2%	2%	3%	300
IRELAND	48%	40%	4%	3%	5%	99
ESPANA	46%	46%	3%	1%	4%	300
UNITED KINGDOM	46%	37%	5%	5%	7%	300
OSTERREICH	44%	40%	6%	3%	5%	200
NEDERLANDS	40%	41%	12%	3%	4%	208
ITALIA	39%	55%	5%	0%	1%	300
SECTEURS - SECTORS						
industrie - industry	51%	40%	5%	1%	3%	891
construction	36%	51%	9%	2%	2%	374
trade - commerce	49%	41%	5%	2%	3%	701
services	49%	40%	6%	1%	3%	1044
TAILLES ENTR. -BUSINESS SIZES						
SME 20-49	46%	43%	7%	2%	2%	2178
SME 50-49	52%	39%	3%	1%	5%	677
MAJORS 250+	57%	35%	5%	1%	2%	155
EXISTE DEPUIS - ACTIVE SINCE						
+30ans / + 30years	48%	39%	7%	2%	4%	1392
11-30ans / 11-30 years	48%	43%	5%	2%	2%	997
0-10ans / 0-10 years	47%	44%	5%	1%	2%	619
EXPORTS %						
Rien / None	44%	45%	7%	2%	3%	1569
Moins de 50% / Less than 50%	54%	38%	4%	1%	2%	978
Supérieur ou égal à 50% / More than or equal to 50%	55%	36%	4%	2%	3%	339

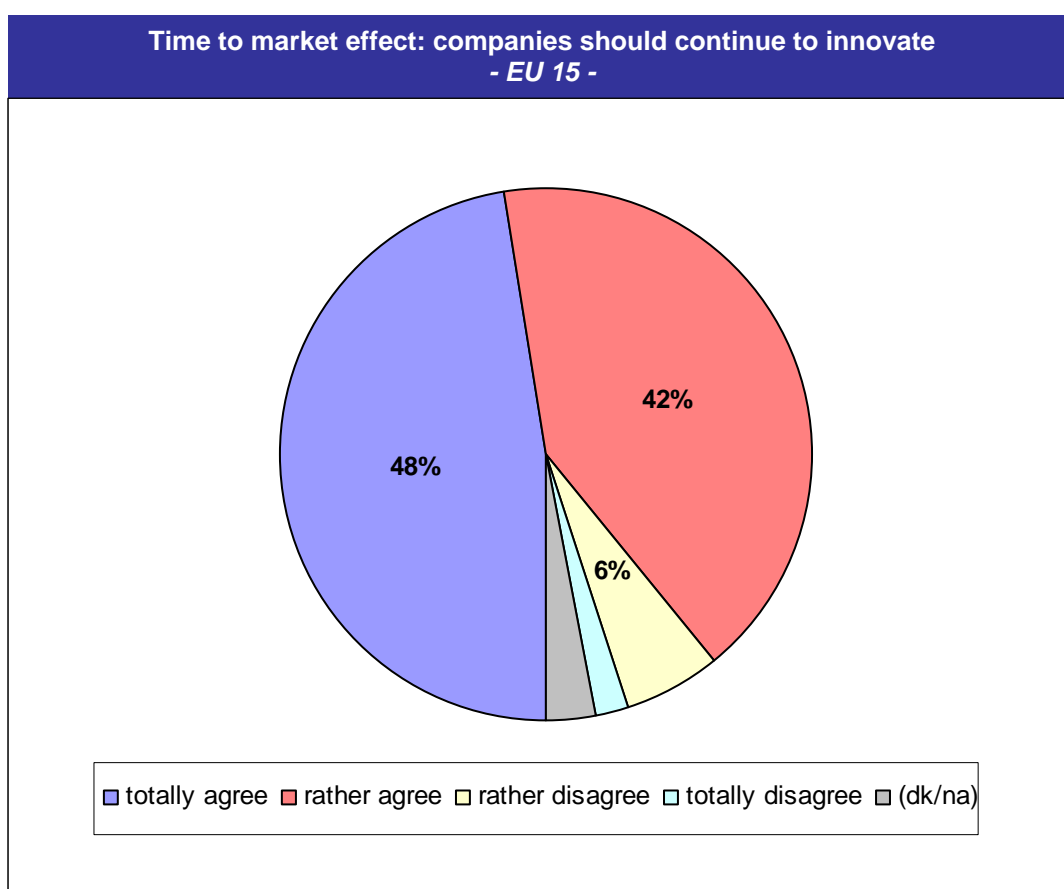
4. IMPACT OF THE MARKET ON INNOVATION

4.1. Time to market effect

- The challenge of the time to market effect should spur companies to innovate -

* **Overall picture:**

Enterprises in the European Union appear to be spurred to innovate by the increasing challenge posed by the “time to market” effect. 90% of company managers agree (including 48% who “totally agree”) that companies should continue to innovate when faced with shorter and shorter time lapses from the time of conception of a new product or service to its launch on the market.

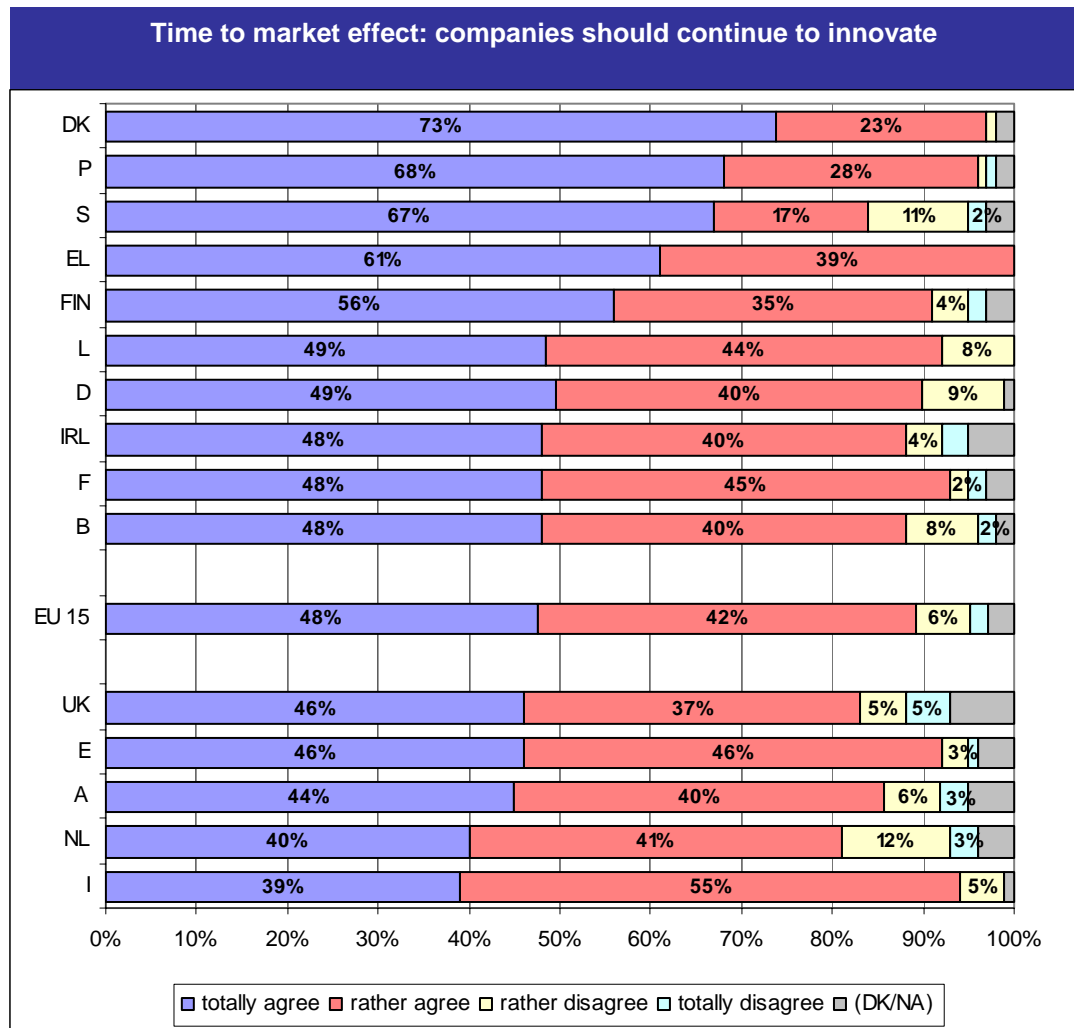


Flash EB 144 – September 2003 – Fig. 10A

* **Breakdown by country:**

The level of acknowledgement of the “time to market” effect and the necessity to continue to innovate is rather identical in all Member States.

Particularly high proportions of company managers in **Denmark** (73%), **Portugal** (68%) and **Sweden** (67%) strongly agree that “since the time required from the conception and the production of a new product or service to its launch on the market, companies should continue to innovate”.



Flash EB 144 – September 2003 – Fig. 10B

5.1b) Pour chacune des propositions suivantes, pouvez-vous me dire si vous êtes tout à fait d'accord, plutôt d'accord, plutôt pas d'accord ou pas du tout d'accord ?... En considérant le marché dans lequel votre entreprise opère aujourd'hui, vous êtes obligé d'innover

5.1 b) For each of the following propositions, could you tell me if you totally agree, rather agree, rather disagree or totally disagree?... Looking at the market your company is operating in today you are obliged to innovate

	tout à fait d'accord / totally agree	plutôt d'accord / rather agree	plutôt pas d'accord / rather disagree	pas du tout d'accord / totally disagree	(NSP&SR) / (DK&NA)	BASE
EU 15	53%	33%	10%	4%	1%	3010
DANMARK	76%	19%	3%	2%	0%	203
SWEDEN	75%	10%	10%	2%	3%	200
LUXEMBOURG	67%	29%	2%	2%	0%	100
PORTUGAL	61%	29%	4%	5%	0%	100
DEUTSCHLAND	59%	26%	11%	3%	0%	300
OSTERREICH	58%	21%	12%	7%	2%	200
ELLAS	57%	33%	8%	1%	0%	100
BELGIQUE	56%	32%	10%	2%	0%	200
FRANCE	52%	36%	8%	5%	0%	300
IRELAND	52%	39%	10%	0%	0%	99
NEDERLANDS	50%	32%	11%	6%	1%	208
UNITED KINGDOM	50%	32%	9%	7%	2%	300
ESPANA	49%	42%	8%	1%	0%	300
FINLAND	49%	32%	11%	8%	0%	100
ITALIA	36%	51%	12%	1%	0%	300
SECTEURS - SECTORS						
industrie - industry	55%	35%	8%	2%	0%	891
construction	42%	37%	14%	7%	0%	374
trade - commerce	56%	30%	10%	3%	1%	701
services	53%	32%	10%	5%	1%	1044
TAILLES ENTR.-BUSINESS SIZES						
SME 20-49	50%	35%	10%	4%	1%	2178
SME 50-49	59%	29%	10%	2%	0%	677
MAJORS 250+	62%	27%	9%	1%	1%	155
EXISTE DEPUIS - ACTIVE SINCE						
+30ans / + 30years	56%	32%	9%	3%	0%	1392
11-30ans / 11-30 years	51%	37%	8%	4%	1%	997
0-10ans / 0-10 years	50%	30%	15%	5%	1%	619
EXPORTS %						
Rien / None	48%	35%	11%	5%	1%	1569
Moins de 50% / Less than 50%	56%	31%	10%	3%	0%	978
Supérieur ou égal à 50% / More than or equal to 50%	65%	27%	6%	0%	1%	339

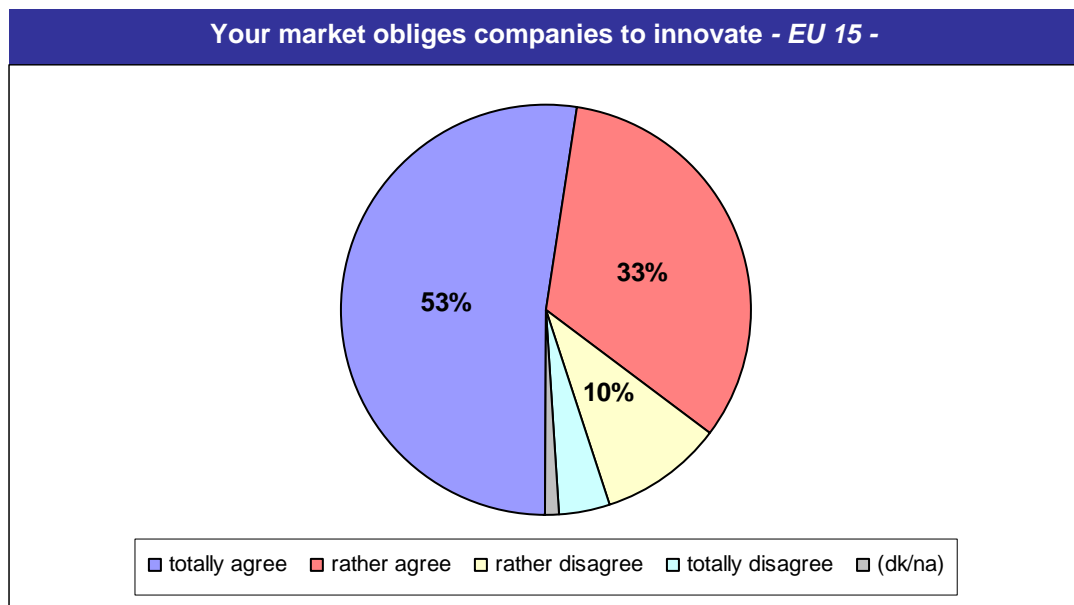
4.2. The market as a driving force for innovation

- Company managers believe that the market obliges yet rewards innovative efforts -

* Overall picture:

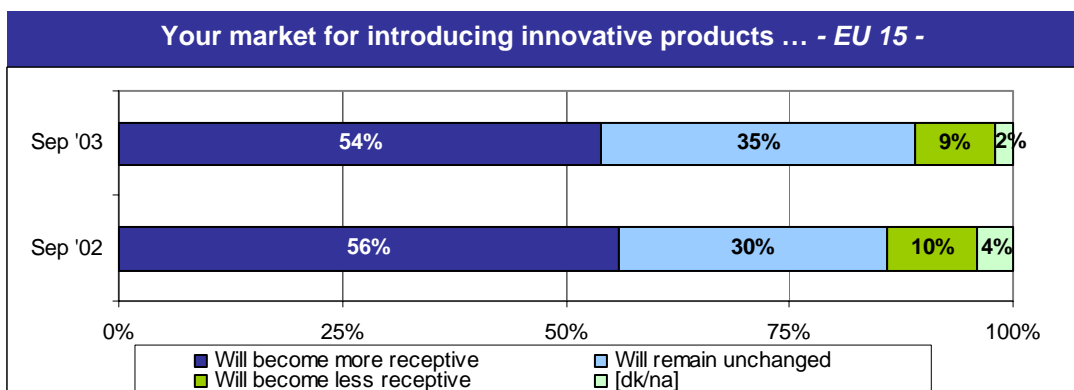
In this section we will look at the results of two different aspects of the market as a driving force for innovation. Firstly, we will look at the market as a force obliging companies to innovate. This question (Q5.1b) was asked for the first time in this wave of the study. Secondly, we will look at whether or not managers in Member States feel that the market will compensate enterprises for their efforts in innovation. This question (Q5.2) has been modified slightly since last year in that this year, managers were explicitly asked to assess the market their company is operating in.

86% of managers interviewed see the market their company is operating in as a force obliging companies to innovate. Of those, 53% "totally agree". This clearly shows that the vast majority of companies in the European Union are already convinced of the necessity to innovate.



Flash EB 144 – September 2003 – Fig. 11A

In the near future, will the market reward companies for their efforts in innovation? 54% of managers interviewed (-2 points) expect that their market for introducing innovative products in the coming years will become more receptive. 35% of managers interviewed (+5 points) believe their market will remain unchanged. Only 9% of managers are of the opinion that their market will become less receptive to innovative products.



Flash EB 144 – September 2003 – Fig. 11B

5.2 Par rapport à la situation actuelle, pensez-vous que pour l'introduction de produits innovants dans les prochaines années, votre marché ...

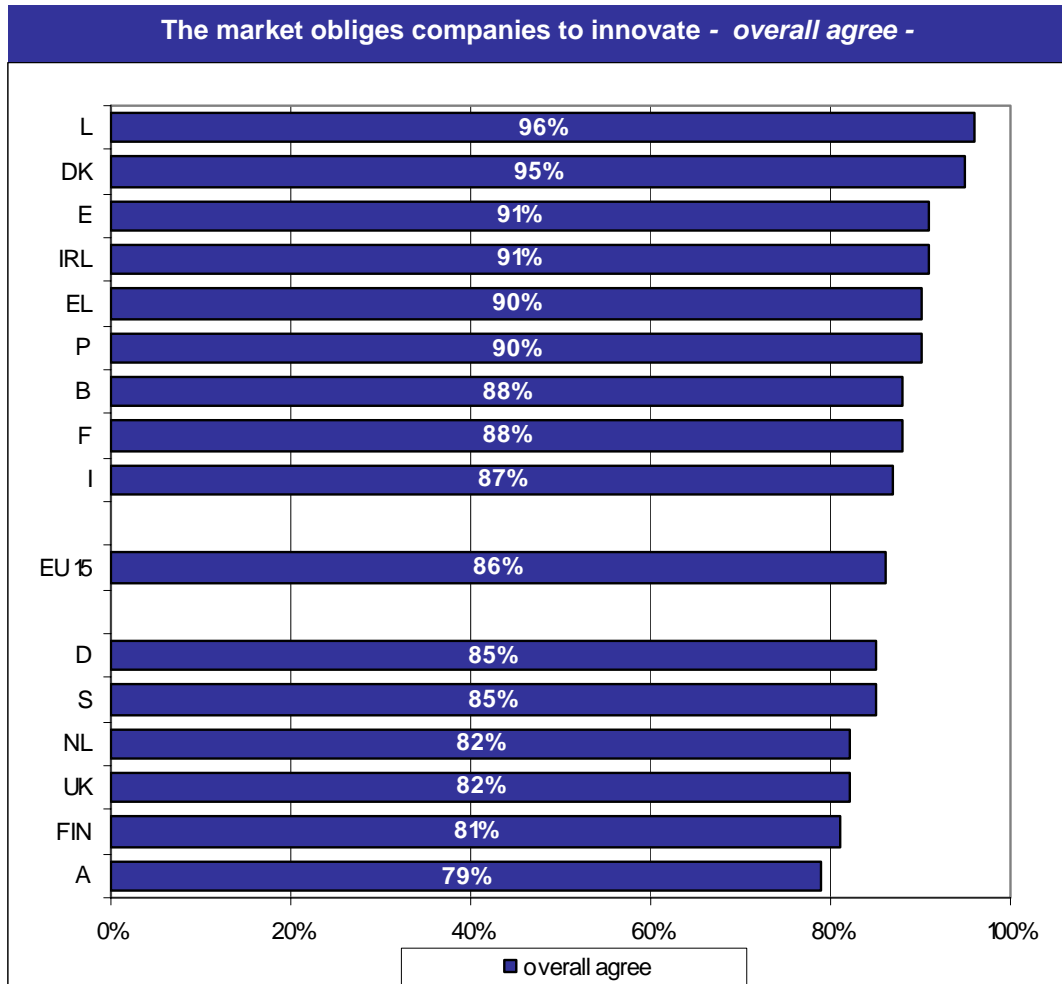
5.2 Compared to the current situation, would you expect that your market for introducing innovative products in the coming years...

	sera plus réceptif/ will become more receptive	demeurera identique / will remain unchanged	sera moins réceptif/ will become less receptive	(NSP&SR) / (DK&NA)	BASE
EU 15	54%	35%	9%	2%	3010
ELLAS	71%	21%	6%	2%	100
IRELAND	69%	24%	5%	2%	99
ESPANA	68%	27%	3%	2%	300
ITALIA	67%	30%	3%	0%	300
DANMARK	62%	31%	5%	2%	203
PORTUGAL	58%	22%	13%	6%	100
LUXEMBOURG	57%	30%	12%	1%	100
SWEDEN	52%	37%	6%	6%	200
DEUTSCHLAND	51%	34%	14%	1%	300
OSTERREICH	50%	39%	7%	4%	200
BELGIQUE	49%	39%	9%	2%	200
FINLAND	49%	34%	10%	6%	100
FRANCE	48%	40%	9%	3%	300
NEDERLANDS	48%	41%	9%	2%	208
UNITED KINGDOM	46%	45%	7%	3%	300
SECTEURS - SECTORS					
industrie - industry	54%	37%	8%	1%	891
construction	49%	40%	10%	1%	374
trade - commerce	53%	36%	8%	3%	701
services	57%	31%	10%	2%	1044
TAILLES ENTR.-BUSINESS SIZES					
SME 20-49	54%	35%	9%	2%	2178
SME 50-49	52%	37%	8%	3%	677
MAJORS 250+	64%	27%	7%	2%	155
EXISTE DEPUIS - ACTIVE SINCE					
+30ans / + 30years	49%	39%	10%	2%	1392
11-30ans / 11-30 years	59%	32%	8%	2%	997
0-10ans / 0-10 years	57%	31%	9%	2%	619
EXPORTS %					
Rien / None	55%	33%	10%	2%	1569
Moins de 50% / Less than 50%	53%	37%	8%	2%	978
Supérieur ou égal à 50% / More than or equal to 50%	56%	36%	6%	1%	339

*

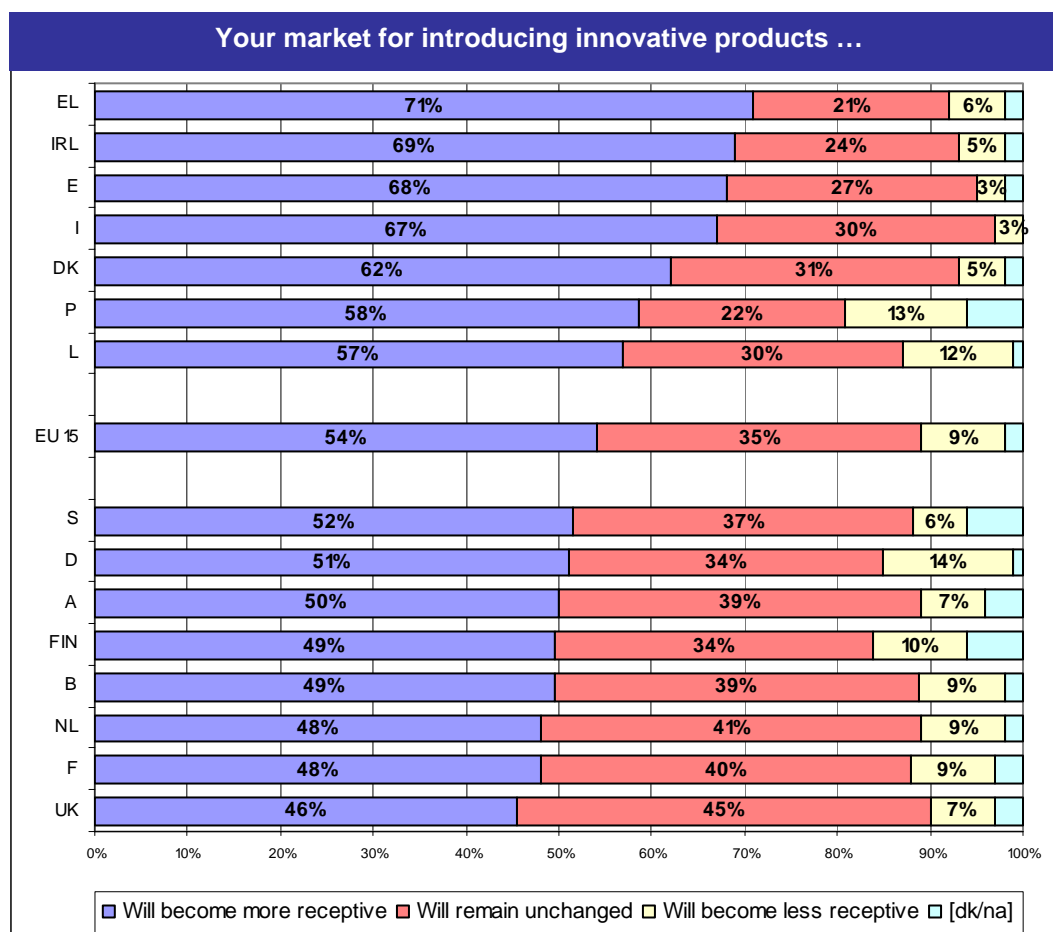
Breakdown by country:

As can be seen from the graph below the vast majority of managers in the European Union are of the opinion that the market they are operating in obliges companies to innovate with agreement rates ranging from 96% in **Luxembourg** and 95% in **Denmark** to 79% in **Austria**.



Flash EB 144 – September 2003 – Fig. 11C

The most positive views on the future *openness of the market* to innovative products are expressed in **Greece** (71%; -9 points) and **Ireland** (69%; +2 points). Both of these countries also ranked highest in September 2002. Managers in the **United Kingdom** are least convinced of this (46%; -6 points), with many believing that the market will remain unchanged (45%). In general, fears that the market may become “less receptive” to innovative products in the coming years are relatively close to the average of 9% in all Member States, but with relatively stronger doubts expressed by **German** (14%; -2 points) and **Portuguese** managers (13%; -3 points).



Flash EB 144 – September 2003 – Fig. 11D

*

Breakdown by company category:

“Majors” (250+ employees), long established companies (for more than 30 years) and/or companies with exports equivalent to 50% or more of sales are most convinced that the market they are operating in obliges companies to innovate.

The views of company managers on the future openness of their market to innovative products are similar for most enterprise categories. Company managers of “majors” are most convinced that the market will become more receptive, confirming the tendency revealed in 2002.

5.1c) Pour chacune des propositions suivantes, pouvez-vous me dire si vous êtes tout à fait d'accord, plutôt d'accord, plutôt pas d'accord ou pas du tout d'accord ?... La globalisation des marchés constitue une opportunité pour innover

5.1 c) For each of the following propositions, could you tell me if you totally agree, rather agree, rather disagree or totally disagree?... Globalisation of markets is an opportunity for innovation

	tout à fait d'accord / totally agree	plutôt d'accord / rather agree	plutôt pas d'accord / rather disagree	pas du tout d'accord / totally disagree	(NSP&SR) / (DK&NA)	BASE
EU 15	30%	43%	17%	7%	3%	3010
DANMARK	54%	33%	5%	3%	5%	203
SWEDEN	45%	10%	26%	12%	8%	200
PORTUGAL	43%	43%	7%	4%	3%	100
ELLAS	41%	45%	8%	4%	1%	100
FINLAND	36%	38%	10%	10%	5%	100
DEUTSCHLAND	34%	40%	19%	6%	2%	300
LUXEMBOURG	32%	42%	23%	3%	0%	100
IRELAND	30%	53%	11%	1%	5%	99
UNITED KINGDOM	30%	41%	13%	9%	7%	300
ESPANA	29%	49%	13%	4%	5%	300
OSTERREICH	27%	31%	22%	13%	6%	200
ITALIA	25%	57%	12%	3%	3%	300
NEDERLANDS	25%	55%	16%	2%	2%	208
BELGIQUE	22%	50%	21%	6%	2%	200
FRANCE	18%	38%	27%	13%	3%	300
SECTEURS - SECTORS						
industrie - industry	30%	44%	17%	7%	2%	891
construction	29%	40%	20%	6%	4%	374
trade - commerce	28%	45%	16%	6%	4%	701
services	31%	42%	16%	8%	4%	1044
TAILLES ENTR.-BUSINESS SIZES						
SME 20-49	28%	44%	17%	7%	4%	2178
SME 50-49	33%	41%	17%	6%	3%	677
MAJORS 250+	40%	42%	15%	2%	1%	155
EXISTE DEPUIS - ACTIVE SINCE						
+30ans / + 30years	28%	40%	20%	8%	5%	1392
11-30ans / 11-30 years	30%	47%	15%	7%	2%	997
0-10ans / 0-10 years	33%	45%	15%	5%	3%	619
EXPORTS %						
Rien / None	27%	44%	17%	7%	4%	1569
Moins de 50% / Less than 50%	30%	44%	18%	6%	2%	978
Supérieur ou égal à 50% / More than or equal to 50%	39%	36%	15%	7%	2%	339

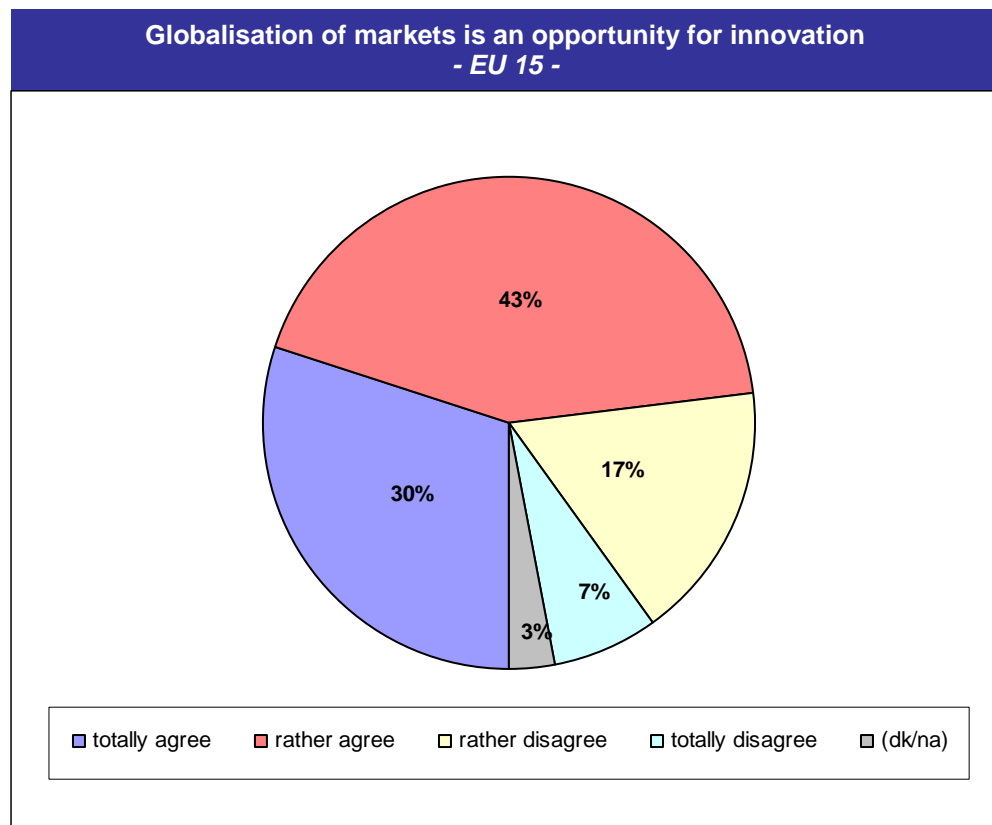
4.3. Globalisation: an opportunity for innovation?

- The vast majority of company managers view globalisation as an opportunity for innovation -

* **Overall picture:**

The process of globalisation is pervading all economies. A large part of this has resulted from the advancement in information technology, trade agreements at the global level and the expansion of multinational corporations' operations. E-business is now booming and changing the business landscape. Global competition is not only a phenomenon of large multinational companies; small and medium-sized enterprises are also beginning to play a more significant role in the New Economy thanks to the availability of IT.

In this question managers were asked for their views on globalisation. Close to three in four managers in the European Union view globalisation of markets as an opportunity for innovation. However, as we can see from the graph below, managers are not totally convinced of this with only 30% responding "totally agree" while 43% "rather agree".

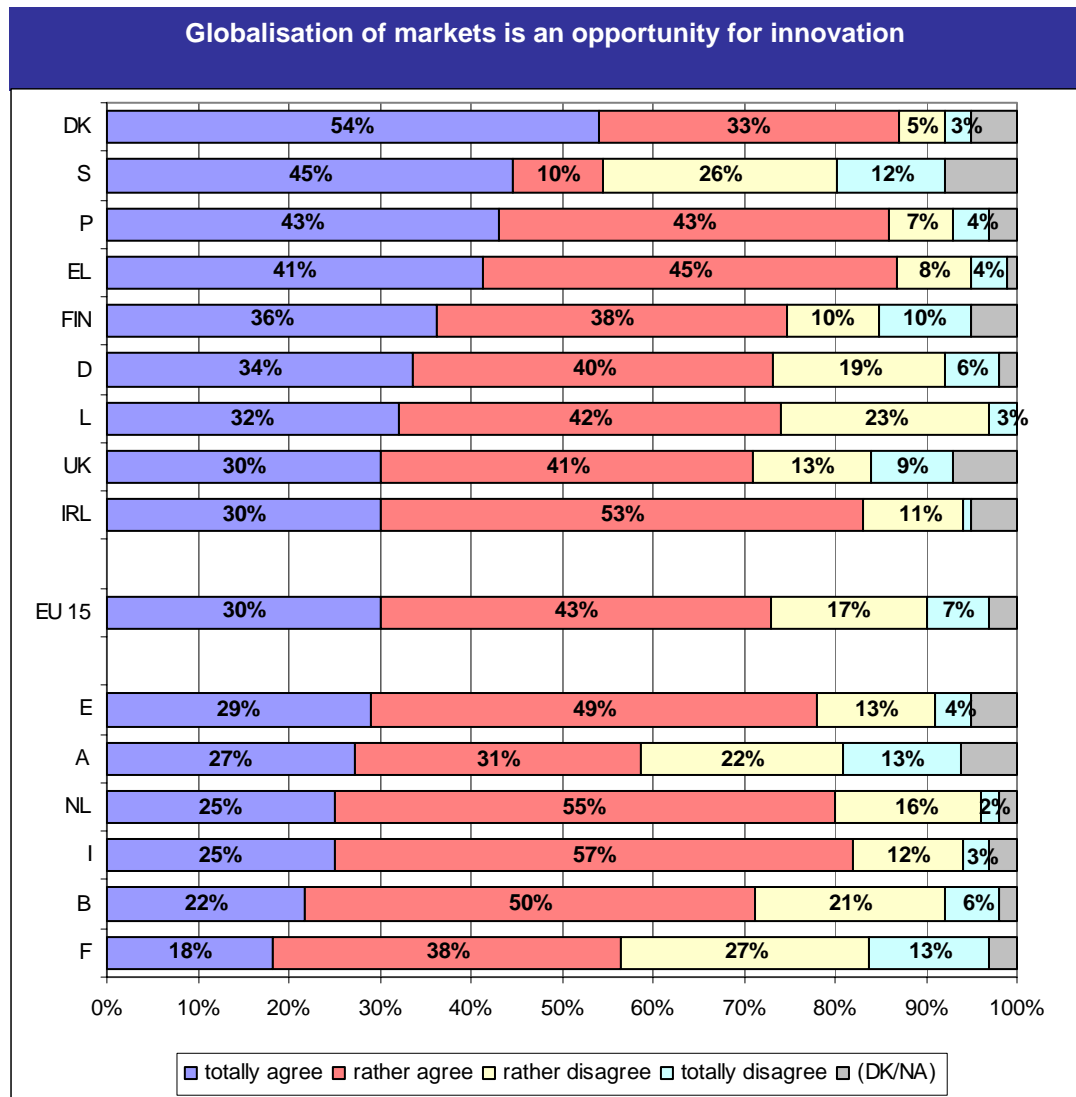


Flash EB 144 – September 2003 – Fig. 12A

* **Breakdown by country:**

In all Member States a majority of managers agree that globalisation of markets is an opportunity for innovation. **Denmark** (54%), **Sweden** (45%) and **Portugal** (43%) rank highest for the proportion of managers who “totally agree”. In contrast only 22% of managers in **Belgium** and 18% in **France** are strongly convinced that globalisation presents an opportunity for innovation.

Looking at the overall “disagree” results, we can see that a relatively high proportion of managers in **France** (40%) and **Sweden** (38%) do not view globalisation as being an opportunity for innovation.



Flash EB 144 – September 2003 – Fig. 12B

* **Breakdown by company category:**

Company characteristics do not appear to bear any strong influence on whether or not managers view globalisation as an opportunity for innovation.

4.1a) A votre avis, la création d'un brevet communautaire, qui harmonisera la législation de la propriété intellectuelle au sein de l'Union européenne, est très efficace, plutôt efficace, plutôt pas efficace ou pas du tout efficace pour encourager : ... les entreprises, en général, à innover

4.1a) In your opinion, the creation of a Community patent, which will harmonise intellectual property legislation throughout the European Union, is very effective, rather effective, rather ineffective or not effective at all for encouraging... companies in general to innovate

	très efficace / very effective	plutôt efficace / rather effective	plutôt pas efficace / rather ineffective	pas du tout efficace / not effective at all	(NSP&SR) / (DK&NA)	BASE
EU 15	12%	46%	16%	9%	16%	3010
ELLAS	38%	55%	3%	0%	3%	100
OSTERREICH	22%	23%	15%	15%	25%	200
PORTUGAL	20%	47%	7%	11%	15%	100
DANMARK	19%	27%	9%	15%	31%	203
ITALIA	19%	71%	6%	2%	3%	300
SWEDEN	18%	38%	10%	7%	26%	200
ESPANA	16%	54%	11%	3%	16%	300
LUXEMBOURG	13%	55%	17%	6%	9%	100
BELGIQUE	11%	51%	19%	5%	15%	200
DEUTSCHLAND	10%	42%	24%	8%	16%	300
FRANCE	10%	47%	17%	10%	16%	300
IRELAND	7%	39%	23%	8%	23%	99
UNITED KINGDOM	6%	37%	15%	23%	19%	300
NEDERLANDS	3%	37%	23%	6%	30%	208
FINLAND	3%	34%	19%	2%	43%	100
SECTEURS - SECTORS						
industrie - industry	16%	50%	15%	6%	13%	891
construction	8%	53%	14%	10%	15%	374
trade - commerce	12%	44%	17%	10%	17%	701
services	10%	42%	18%	11%	19%	1044
TAILLES ENTR.-BUSINESS SIZES						
SME 20-49	11%	46%	16%	10%	17%	2178
SME 50-49	14%	48%	16%	8%	14%	677
MAJORS 250+	12%	41%	19%	8%	21%	155
EXISTE DEPUIS - ACTIVE SINCE						
+30ans / + 30years	12%	44%	17%	9%	18%	1392
11-30ans / 11-30 years	13%	49%	16%	9%	13%	997
0-10ans / 0-10 years	12%	46%	16%	10%	16%	619
EXPORTS %						
Rien / None	11%	44%	16%	10%	19%	1569
Moins de 50% / Less than 50%	13%	48%	18%	7%	14%	978
Supérieur ou égal à 50% / More than or equal to 50%	15%	51%	14%	8%	12%	339

4.1b) A votre avis, la création d'un brevet communautaire, qui harmonisera la législation de la propriété intellectuelle au sein de l'Union européenne, est très efficace, plutôt efficace, plutôt pas efficace ou pas du tout efficace pour encourager : ... votre entreprise à innover

4.1b) In your opinion, the creation of a Community patent, which will harmonise intellectual property legislation throughout the European Union, is very effective, rather effective, rather ineffective or not effective at all for encouraging... your company to innovate

	très efficace / very effective	plutôt efficace / rather effective	plutôt pas efficace / rather ineffective	pas du tout efficace / not effective at all	(NSP&SR) / (DK&NA)	BASE
EU 15	10%	36%	18%	18%	18%	3010
ELLAS	30%	56%	4%	6%	5%	100
PORTUGAL	24%	43%	4%	16%	13%	100
OSTERREICH	19%	27%	15%	14%	24%	200
DANMARK	14%	16%	9%	34%	27%	203
ESPANA	13%	42%	18%	6%	21%	300
SWEDEN	11%	31%	13%	12%	34%	200
DEUTSCHLAND	10%	35%	21%	14%	20%	300
ITALIA	10%	61%	17%	7%	5%	300
UNITED KINGDOM	10%	24%	12%	41%	13%	300
FRANCE	7%	33%	21%	21%	19%	300
LUXEMBOURG	7%	39%	13%	25%	17%	100
BELGIQUE	6%	35%	21%	15%	24%	200
IRELAND	6%	25%	25%	23%	22%	99
NEDERLANDS	3%	28%	27%	9%	34%	208
FINLAND	1%	11%	16%	32%	40%	100
SECTEURS - SECTORS						
industrie - industry	15%	43%	16%	13%	13%	891
construction	6%	37%	17%	18%	23%	374
trade - commerce	9%	33%	19%	21%	18%	701
services	8%	32%	20%	19%	21%	1044
TAILLES ENTR.-BUSINESS SIZES						
SME 20-49	10%	36%	17%	19%	18%	2178
SME 50-49	12%	38%	20%	15%	16%	677
MAJORS 250+	10%	33%	20%	15%	23%	155
EXISTE DEPUIS - ACTIVE SINCE						
+30ans / + 30years	11%	33%	18%	19%	20%	1392
11-30ans / 11-30 years	10%	40%	19%	16%	15%	997
0-10ans / 0-10 years	10%	37%	17%	17%	18%	619
EXPORTS %						
Rien / None	8%	33%	19%	20%	20%	1569
Moins de 50% / Less than 50%	12%	38%	18%	15%	16%	978
Supérieur ou égal à 50% / More than or equal to 50%	15%	44%	16%	14%	11%	339

5. INNOVATION AND THE EUROPEAN UNION

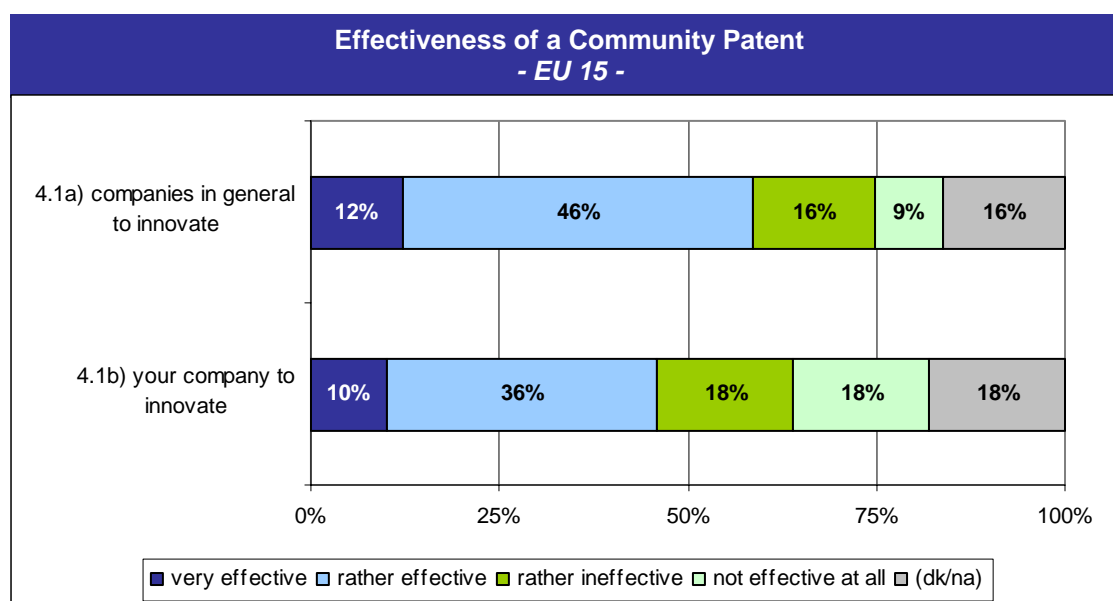
5.1. Effect of a Community Patent

- High levels of uncertainty surround the effectiveness of a Community Patent -

* **Overall picture:**

In the European Union, patent protection is currently provided by two systems, neither of which is based on a Community legal instrument: the national patent systems and the European patent system. The national patent has undergone *de facto harmonisation* with the signing of several international conventions, including the Munich Convention in 1973, to which all Member States have acceded. The Munich Convention primarily lays down a single procedure for the granting of European patents. The European Patent Office grants the patent, which then becomes a national patent and is subject to national rules. Although the Munich Convention creates a single system for granting patents, there is still no Community patent forming part of the Community legal order. A single and affordable patent for the whole Community, offering adequate legal protection, will enable Europe, to reap the full benefits of research and technological advances and to raise the level of private R&D investment in the Community.⁷ Moreover, the advantages of a Community Patent have been quantified as follows: estimated annual savings in processing and administering intellectual property rights of around 0.5 billion euro, lower litigation costs and simpler enforcement.⁸

So what do managers around the European Union think of the creation of a Community Patent? Executives were asked their views on the effectiveness of a Community Patent for innovation for companies in general as well as their own company. As we can see from the graph below managers are more positive about the effectiveness of a Community Patent for companies in general than for their own company. In both instances enthusiasm is somewhat measured with 12% stating that this would be “very effective” for companies in general and 10% indicating that this would be “very effective” for their own company’s innovation.



Flash EB 144 – September 2003 – Fig. 13A

⁷ <http://europa.eu.int/scadplus/leg/en/lvb/126056.htm> SCADPlus: Community patent

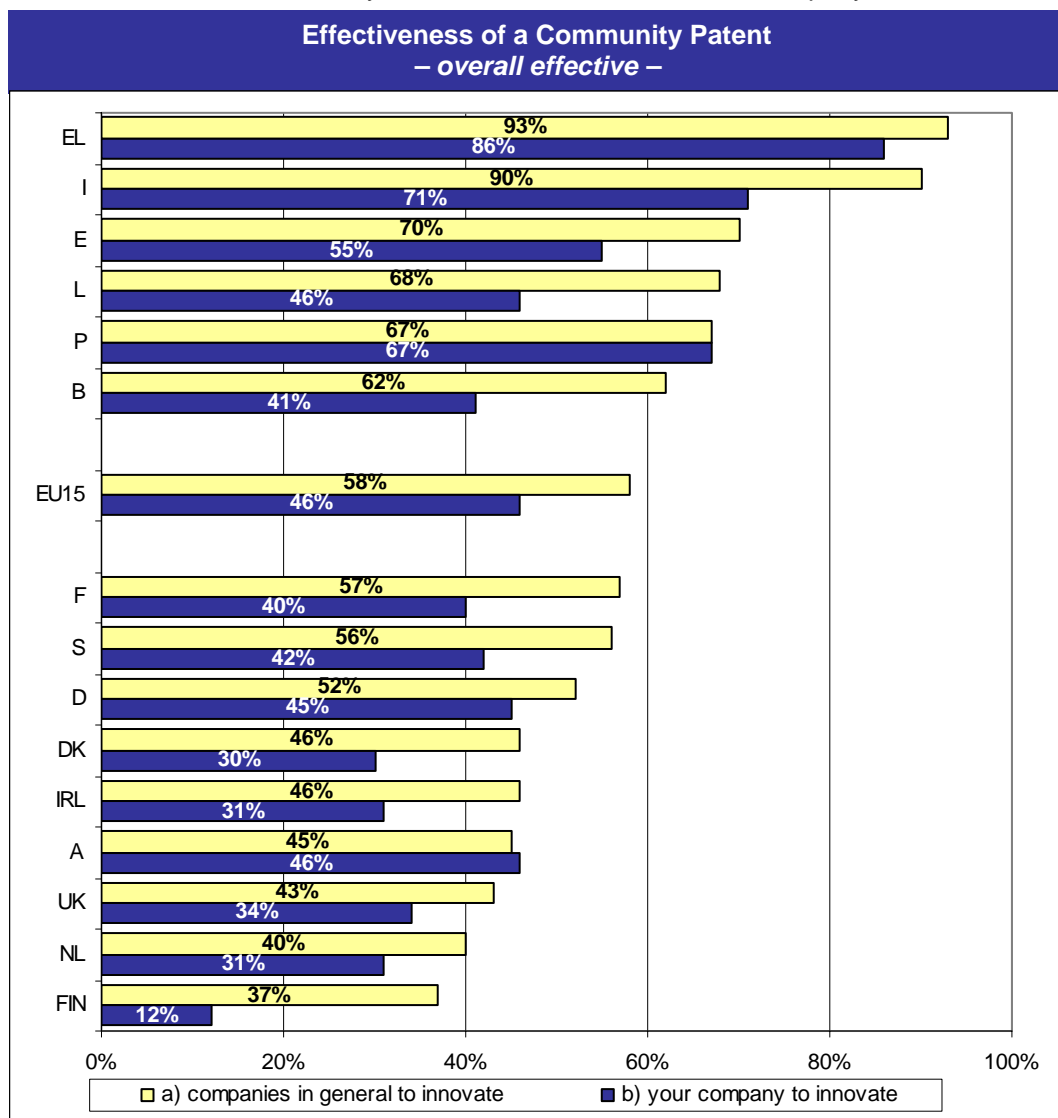
⁸ COM(2003) 5

It seems that a relatively high proportion of managers do not feel sufficiently informed to give a positive or negative response. In the case of the effectiveness for companies in general to innovate, 16% did not know or could not give an answer and from the point of view of their own company, 18% fell under this category. This would suggest that there is a need for a more widespread dissemination of information on the objectives, the functioning, the application and the effects of a Community Patent. The Community Patent can only be truly successful if managers are made aware of its existence and convinced of its effectiveness.

*

Breakdown by country:

The range of perceptions regarding the effectiveness of a Community Patent for companies in general to innovate goes from 93% in **Greece** and 90% in **Italy** to as low as 40% in the **Netherlands** and 37% in **Finland**. A similar ranking order occurs for managers' views on the effectiveness of a Community Patent for their company to innovate: **Greece** (86%) and **Italy** (71%) rank highest while only 12% of managers in **Finland** believe the Community Patent will be effective for their company.



Flash EB 144 – September 2003 – Fig. 13B

The high levels of reluctance in **Finland** to recognise the effectiveness of a Community Patent is partly due to the fact that over four in ten respondents did not know or could not give an answer one way or the other, either from a general perspective or, from their companies perspective. The uncertainty surrounding the introduction of a Community Patent is not exclusive to Finland. Looking first at the levels of uncertainty regarding the effectiveness of a Community Patent for companies generally, we can see that in **Denmark** (31%), the **Netherlands** (30%), **Sweden** (26%) and **Austria** (25%), at least one in four managers fall under the "don't know/no answer" category. Uncertainty levels are also high when managers were asked for their views on the effectiveness of a Community Patent from the perspective of their company. In this instance, we see that in the **Netherlands** (34%), **Sweden** (34%) and **Denmark** (27%), high proportions of managers are unsure about the effectiveness of a Community Patent from their company's point of view.

Significantly high proportions of negative perceptions emerged from managers in **Germany** (32%) and the **United Kingdom** (38%) regarding the effectiveness of a Community Patent for companies in general to innovate.

Compared to companies in general, higher proportions of managers in each Member State believe that the Community Patent will be "ineffective" for their company to innovate. Notably negative perceptions emerged in the **United Kingdom** (53%), **Ireland** and **Finland** (48%), **Denmark** (43%) as well as **France** (42%).

*

Breakdown by company category:

There are some factors influencing the reactions of company managers regarding the effectiveness of a Community Patent for their company. Executives of companies in industry or, as might be expected companies engaged in exports are most convinced of the effectiveness of a Community Patent for the innovations of their company.

5.3 Dans les années à venir, pour votre entreprise, à quel niveau pensez-vous que se situeront les deux impacts les plus positifs du marché unique européen en ce qui concerne l'innovation... ? (citer les deux impacts les plus important)

5.3 In the coming years, where would you expect for your company, the two most positive impacts of the European single market when it comes to innovation ...? (please name two most important impacts)

	meilleur accès à nouv marchés / better access to new markets	réglement. améliorées / improved regulations	fournit + disponibles ou - coût / cheaper or better avail supplies	Meilleur accès aux nouvelles technologies,.. / better access to new technologies,	Meilleure coop. pour innover / better co- op. to innovate	(Autres) / (Others)	(NSP&SR) / (DK&NA)	BASE
EU 15	44%	38%	35%	24%	21%	2%	6%	3010
IRELAND	57%	17%	46%	22%	26%	0%	7%	99
DEUTSCHLAND	53%	39%	35%	22%	22%	1%	4%	300
ITALIA	52%	47%	24%	29%	19%	1%	0%	300
ELLAS	44%	31%	34%	40%	34%	1%	0%	100
OSTERREICH	42%	29%	36%	16%	18%	3%	12%	200
BELGIQUE	40%	46%	33%	29%	31%	0%	2%	200
NEDERLANDS	39%	33%	32%	28%	24%	2%	14%	208
ESPANA	39%	30%	39%	33%	20%	1%	6%	300
UNITED KINGDOM	38%	33%	40%	21%	24%	6%	14%	300
PORTUGAL	38%	32%	25%	22%	20%	0%	9%	100
DANMARK	37%	44%	40%	21%	15%	0%	6%	203
LUXEMBOURG	36%	37%	36%	34%	26%	0%	2%	100
SWEDEN	34%	31%	48%	14%	21%	2%	11%	200
FRANCE	34%	45%	40%	19%	18%	0%	3%	300
FINLAND	29%	28%	54%	34%	18%	0%	6%	100
SECTEURS - SECTORS								
industrie - industry	51%	39%	33%	22%	24%	2%	3%	974
construction	37%	36%	44%	33%	15%	0%	5%	385
trade - commerce	44%	38%	39%	19%	23%	2%	6%	707
services	41%	38%	32%	25%	21%	2%	9%	944
TAILLES ENTR.-BUSINESS SIZES								
SME 20-49	43%	38%	37%	23%	20%	2%	6%	1920
SME 50-49	46%	39%	33%	25%	23%	2%	5%	652
MAJORS 250+	49%	33%	24%	29%	30%	1%	4%	438
EXISTE DEPUIS - ACTIVE SINCE								
+30ans / + 30years	44%	37%	36%	23%	21%	3%	6%	1567
11-30ans / 11-30 years	45%	38%	34%	26%	21%	1%	5%	974
0-10ans / 0-10 years	43%	40%	35%	22%	22%	1%	7%	465
EXPORTS %								
Rien / None	37%	38%	38%	27%	17%	2%	8%	1473
Moins de 50% / Less than 50%	53%	39%	32%	20%	27%	1%	3%	997
Supérieur ou égal à 50% / More than or equal to 50%	53%	37%	32%	20%	23%	4%	3%	442

5.2. Impact of the Single Market on Innovation

- Managers view the European Single Market through its size and common rules as an important driving force for innovation -

*

Overall picture:

Executives were asked to identify the two most positive impacts of the European Single Market on innovation in the coming years. It should be noted that in this wave of the study, respondents were asked to give two of the most positive impacts, whereas in the previous wave, they were asked for only one.

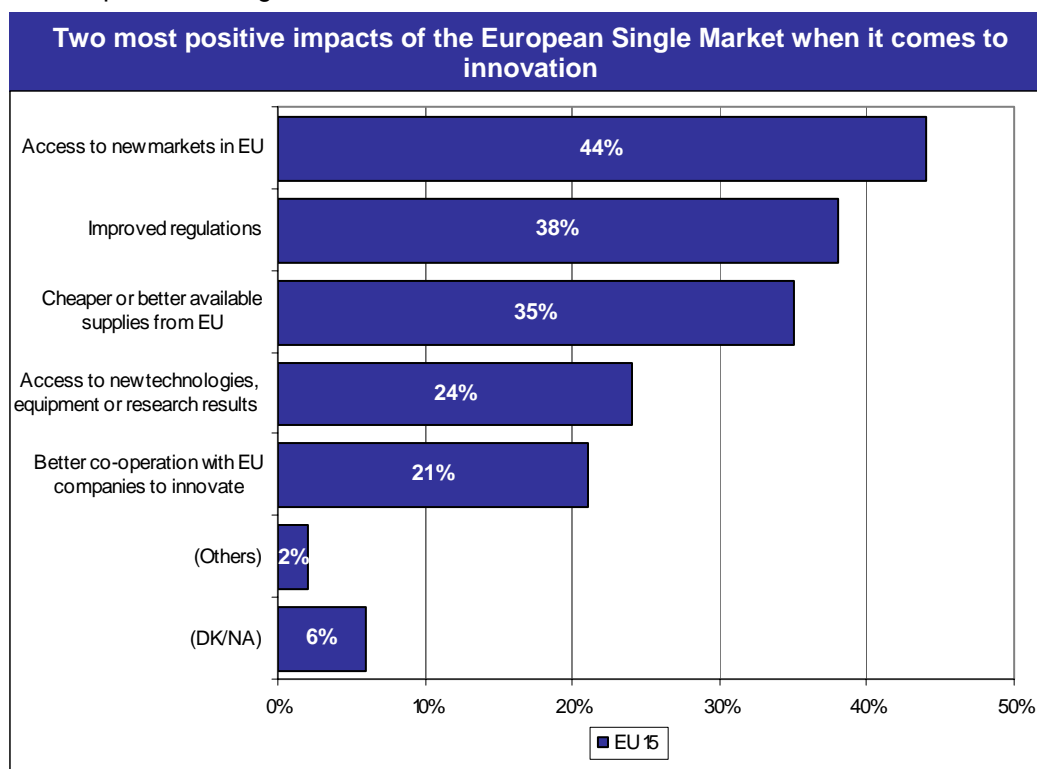
Two arguments relate to the size of the market, either for supply or sales, one refers to the regulatory framework and finally two focus on the facilities to innovate, either through access to technologies or co-operation in the interests of innovation.

The impact that was cited by most managers was “better access to new markets in the European Union (for sale of products and services)”. The Single Market has created a marketplace of 380 million people and 44% of managers believe that this will help their company to innovate over the coming years.

The free movement of goods and services brings “cheaper or better available supplies from other regions in Europe” and 35% of managers indicated that this is what will benefit their company most when it comes to innovation.

This survey also highlighted the confidence that managers have in the legislation relating to safeguarding fair competition. 38% of managers confirmed that “improved regulations, providing equal opportunities for competitors at home and abroad” would be, for the innovative efforts of their company, one of the most positive impacts of the Single Market over the coming years.

Managers thereby view the European Single Market, through its size and common rules, as an important driving force for innovation.



Flash EB 144 – September 2003 – Fig. 14A

*

Breakdown by country:

“Better access to new markets in the European Union” is expected to be of most benefit to the innovative effort of 57% of companies in **Ireland**, 53% of companies in **Germany** and 52% of companies in **Italy**. Only 29% of managers in **Finland** identified this as being among the most positive impacts for their company in the coming years.

“Cheaper or better available supplies from other regions in Europe” is expected to be one of the most important impacts of the Single Market for the innovative efforts of 54% of companies in **Finland** compared to around one in four companies in **Italy** and **Portugal**.

Over four in ten company managers in **Italy** (47%), **Belgium** (46%), **France** (45%) and **Denmark** (44%) perceive “improved regulations, providing equal opportunities for competitors at home and abroad” as being among the most positive impacts of the European Single Market for their future innovative efforts.

* **Breakdown by company category:**

“Better access to new markets in the European Union (for sale of products and services)”, tends to be perceived as being one of the most important positive impacts of the Single Market on future innovations for companies in:

- the industrial sector,
- “majors” (250+) or, not surprisingly
- exporting companies

“Better access to new technologies, equipment or research results”, tends to be more frequently viewed as being one of the most important positive impacts for forthcoming innovations for companies in:

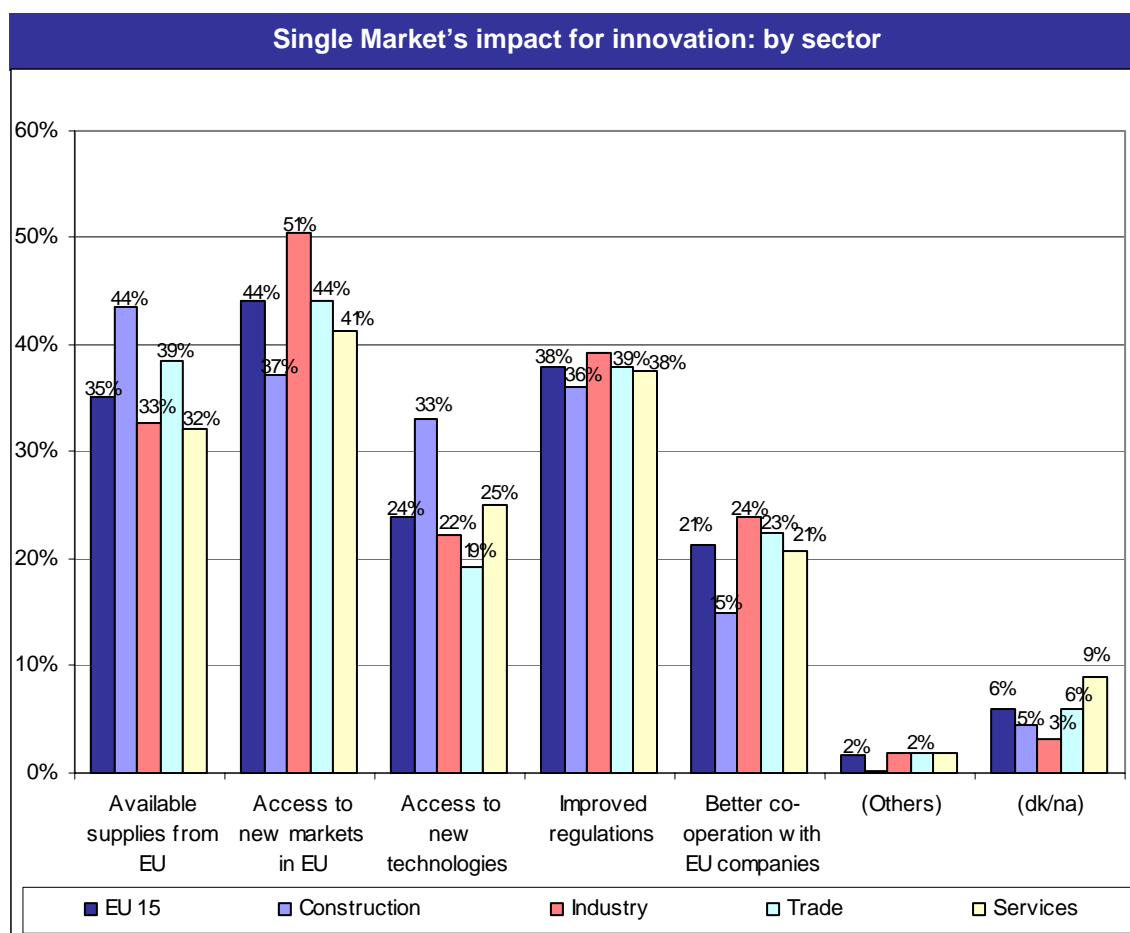
- construction,
- “majors” (250+) or
- non-exporting companies

“Cheaper or better available supplies from other regions in Europe”, seems to be expected to be one of the most important impacts of the Single Market for the innovative efforts of companies with the following profile:

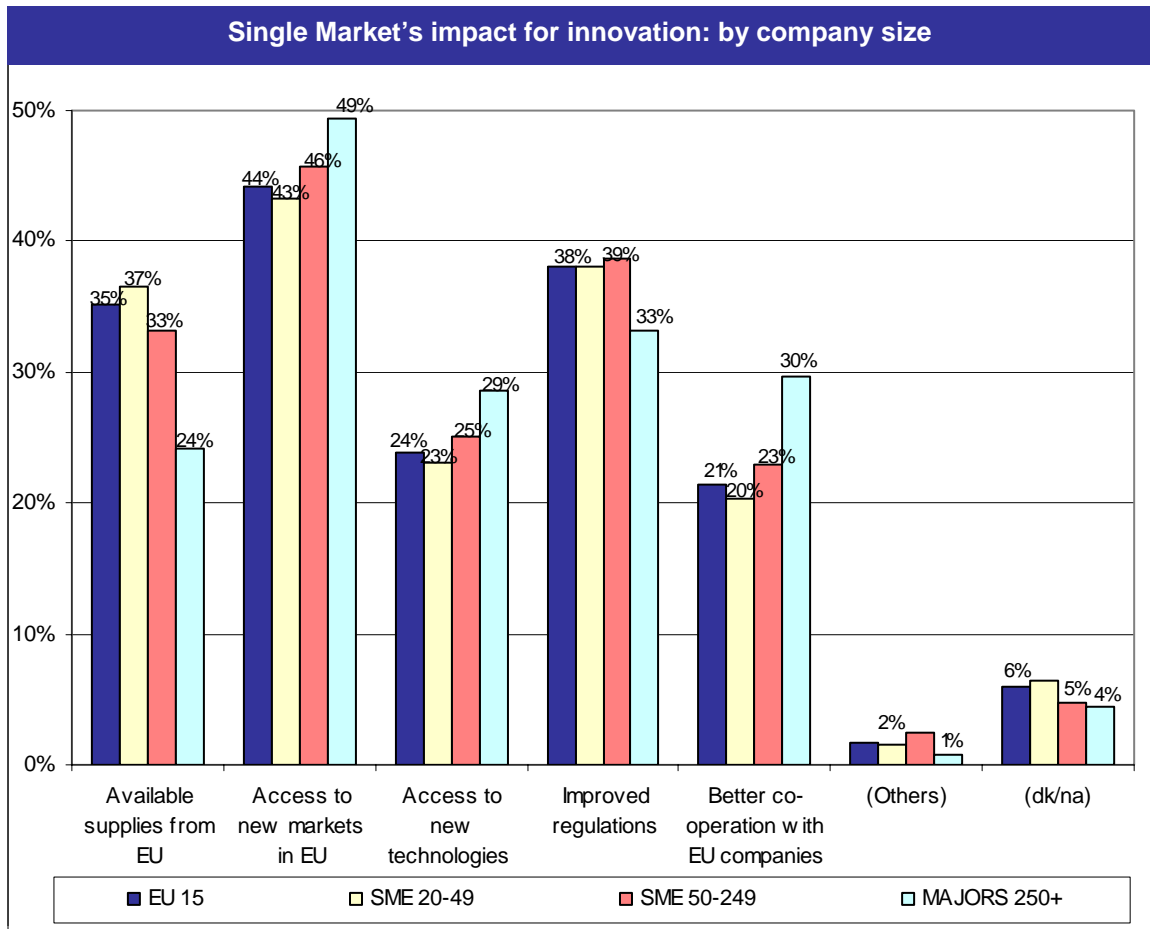
- construction,
- SMEs or
- non-exporting

“Better co-operation with other European companies to innovate”, tends to be foreseen as being the most significant impact of the Single Market for the innovative efforts of companies with the following characteristics:

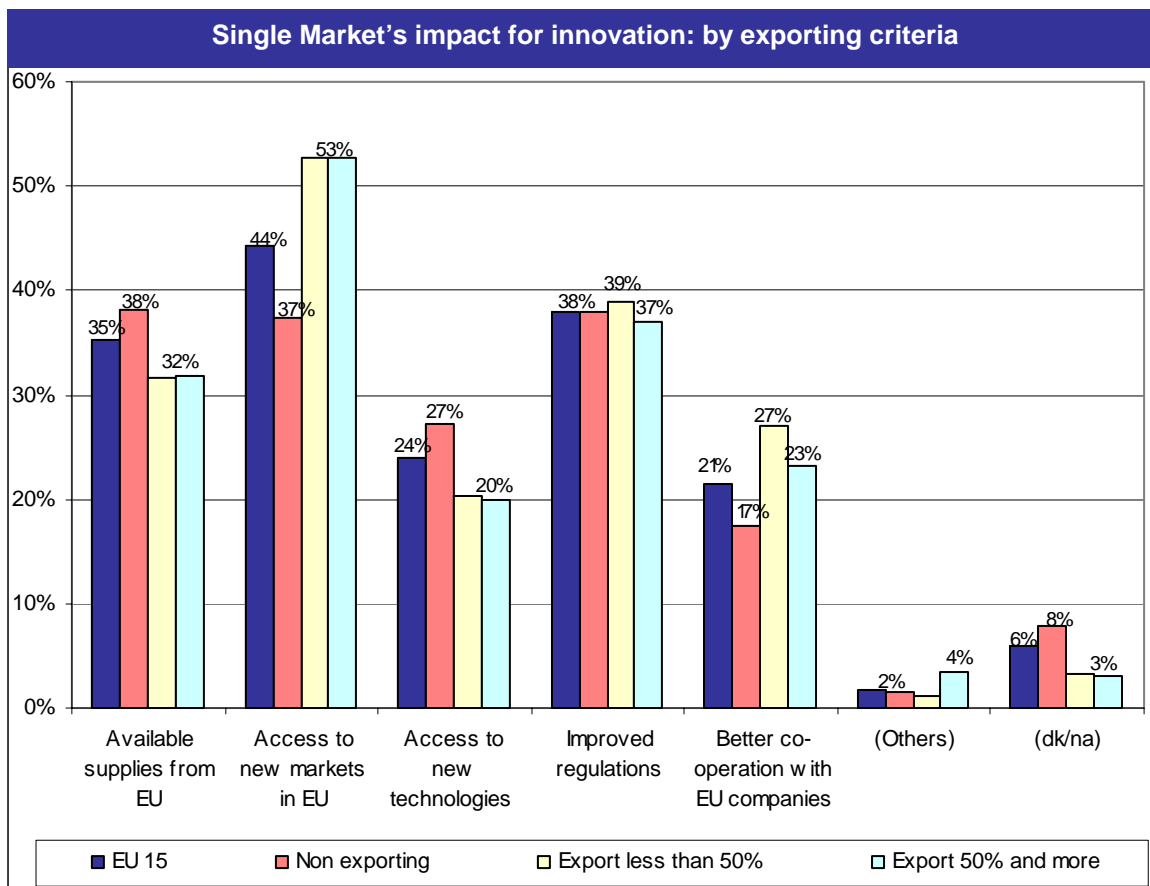
- “majors” (250+) or
- exports that account for less than 50% of their turnover



Flash EB 144 – September 2003 – Fig. 14B



Flash EB 144 – September 2003 – Fig. 14C



Flash EB 144 – September 2003 – Fig. 14D

METHODOLOGICAL NOTE

The methodology underlying this survey is that of the FLASH surveys conducted by the Directorate General Press and Communication (UnitB/1 "Opinion polls"), whose team was involved in drawing up the questionnaire and managed the survey.

For this FLASH survey, 3010 company managers were interviewed by telephone between the 1st and the 18th of September 2003. The breakdown of this sample over the various Member States was agreed between the Commission and EOS GALLUP EUROPE, subject to two requirements:

- (1) that the results obtained be as representative as possible of all companies (agriculture and public administration were excluded) concerned, (i.e. those employing at least 20 people) in the European Union;
- (2) that the results obtained enable a true picture to be formed of the situation in each of the 15 Member States of the European Union, even for the smallest among them.

For budgetary reasons, a maximum total size was set for the sample, the goal of achieving best possible representativeness would mean having to distribute the interviews over the various Member States according to the number of suitable companies active in each country, which in turn would reduce the participation of some countries to a purely symbolic level. By contrast, the goal of achieving best possible comparability between countries would mean having to distribute the interviews uniformly, which would seriously reduce the accuracy of European-level results after re-weighting.

Consequently, the solution adopted is a compromise between both requirements. It was decided that 100 managers would be interviewed in the countries with the fewest suitable enterprises (**Greece, Ireland, Luxembourg, Portugal and Finland**), 300 in those with the most (**Germany, Spain, France, Italy and the United Kingdom**) and 200 in the other Member States of the European Union (**Belgium, Denmark, the Netherlands, Austria and Sweden**).

Dun & Bradstreet prepared the lists of suitable companies to be interviewed, drawing a sample from their European databases. Sampling was carried out according to three criteria: *country*, *size of company* and *activity sector*. Within each cell defined by these criteria, companies were selected at random.

The total sample has been distributed between these sampling "cells" in a way which does not follow the actual distribution of businesses within the European Internal Market: the small countries as well as the larger businesses have been intentionally "over-sampled" in order to get significant results for each level of analysis i.e. the 15 Member States, the three employment sizes of companies and the four activity sectors.

Of course during the data processing, each cell in the cross distribution of the sample has been re-weighted according to its real weight within the European Union. Thus, the total results presented are no longer affected by over and under sampling, and they are representative of the total universe of companies with "20+ employees" within the European Union.

The reader should bear in mind that the accuracy of each individual result depends on the size of the sample available. The accuracy of the overall result (for the European Union as a whole) is much better than that for each national or sector result etc. That is why we specify in the tables the "base" on which each result was obtained.

It is also necessary to explain how "non-responses" (don't know, no opinion etc.) are dealt with in our analysis. These non-responses may reflect hesitation, uncertainty or a lack of knowledge, the extent of which may be important for the purposes of the analysis. In this case, they provide useful information and they should be treated in the same way as actual responses. It is equally possible, however, that these non-responses are of no informative value, or that they are no more than a kind of "noise" stemming from a low rate of uncertainty and interfere with the "reception" of the information in which we are interested. In this case, they can be eliminated from the respondent base so as to achieve maximum accuracy with the content analysed. In this survey the "don't know/no response" options were not included in the analysis of questions 1.1, 1.2, 1.4 and 3.2, thus slightly reducing the statistical bases for the calculation of percentages.

The complete results of this survey were processed in accordance with the usual rules applying to the Eurobarometer Flash Surveys - Specific Target Groups

Technical Note

Détails du sondage

Ce sondage téléphonique FLASH EUROBAROMETRE 144: INNOBAROMETRE 2003 a été réalisé pour la Direction Générale ENTREPRISE de la Commission Européenne.

Il s'agit d'un FLASH EUROBAROMETRE CIBLES SPECIFIQUES « ENTERPRISE », géré et organisé par la Direction Générale PRESS, Unité B/1.

Les interviews ont été réalisées entre le 1 septembre et le 18 septembre 2003 par les Instituts EOS GALLUP EUROPE dont la liste suit :

Belgique	B	TNS DIMARSO - BRUXELLES
Danemark	DK	TNS GALLUP - KOBENHAVN
Allemagne	D	TNS EMNID - BIELEFELD
Grèce	EL	TNS ICAP - ATHENS
Espagne	E	TNS DEMOSCOPIA - MADRID
France	F	TNS SOFRES - MONTROUGE
Irlande	IRL	IRISH MKTG SURVEYS - DUBLIN
Italie	I	DOXA - MILANO
Luxembourg	L	TNS ILReS - LUXEMBOURG
Pays-Bas	NL	TNS NIPO - AMSTERDAM
Autriche	A	ÖSTERREICHISCHES GALLUP-VIENNA
Portugal	P	TNS EUROTESTE - LISBOA
Finlande	FIN	TNS SUOMEN GALLUP - ESPOO
Suède	S	TNS SVENSKA GALLUP - STOCKHOLM
Royaume Uni	UK	ICM - LONDON

Représentativité des résultats

Les cibles de ce Flash Eurobaromètre ont été définies par la Commission Européenne comme : toutes les entreprises - agriculture et l'administration publique exceptées - qui emploient au moins 20 personnes et sont installées dans l'Union Européenne.

Dun & Bradstreet a préparé les listes des entreprises qualifiées pour répondre en tirant un échantillon de leurs bases de données européennes. Ce tirage a été réalisé selon trois critères : le pays (15 niveaux), la taille des entreprises (3 niveaux : 20-49, 50-249 et 250 emplois et plus), et le secteur d'activités (4 niveaux : Construction, Industries, Services et Commerce/Distribution).

Dans chacune des 180 cellules définies par ces critères, le tirage a été réalisé au hasard.

La répartition de l'échantillon total entre les cellules de la grille d'échantillonnage s'est faite d'une manière non proportionnelle à la distribution des entreprises du Marché Intérieur Européen : les petits pays ainsi que les grandes entreprises ont été « sur-échantillonnées » de manière à obtenir une base statistique suffisante pour chaque niveau d'analyse, à savoir :

- les 15 pays membres
- les trois catégories de tailles d'entreprises
- les quatre secteurs d'activités.

Bien sûr au moment du traitement des données chaque cellule de la grille d'échantillonnage a été repondérée de manière à reprendre son poids exact dans l'ensemble du Marché Intérieur Européen. De cette manière les résultats « totaux » ne sont pas biaisés par une éventuelle sur- ou sous-représentation des composantes de l'univers analysé.

Dans chaque entreprise la personne interrogée est un cadre supérieur (de la Direction Générale, Direction administrative ou Direction financière). C'est l'interviewer qui s'assure de l'identité de ce dirigeant, en même temps qu'il contrôle l'exactitude des caractéristiques renseignées par Dun & Bradstreet, à savoir : le nombre de personnes employées et le secteur d'activités.

Survey details

This telephone Survey FLASH EUROBAROMETER 144: INNOBAROMETER 2003 was conducted on behalf of the Directorate-General ENTREPRISE of the European Commission.

It is a SPECIFIC TARGETS "BUSINESSES" FLASH EUROBAROMETER SURVEY, organised and managed by the Directorate-General PRESS, Unit B/1.

The interviews were conducted between the 1st of September and the 18th of September 2003 by these EOS GALLUP EUROPE Institutes:

(Interviews : 02/09/2003 – 18/09/2003)	Belgium
(Interviews : 01/09/2003 – 16/09/2003)	Denmark
(Interviews : 01/09/2003 – 12/09/2003)	Germany
(Interviews : 01/09/2003 – 12/09/2003)	Greece
(Interviews : 02/09/2003 – 12/09/2003)	Spain
(Interviews : 01/09/2003 – 15/09/2003)	France
(Interviews : 01/09/2003 – 18/09/2003)	Ireland
(Interviews : 01/09/2003 – 08/09/2003)	Italy
(Interviews : 01/09/2003 – 12/09/2003)	Luxembourg
(Interviews : 01/09/2003 – 17/09/2003)	Netherlands
(Interviews : 02/09/2003 – 17/09/2003)	Austria
(Interviews : 01/09/2003 – 16/09/2003)	Portugal
(Interviews : 03/09/2003 – 16/09/2003)	Finland
(Interviews : 01/09/2003 – 15/09/2003)	Sweden
(Interviews : 01/09/2003 – 15/09/2003)	United Kingdom

Representativeness of the results

The targets for this Flash Eurobarometer were defined by the European Commission as: all companies – agriculture and public administration excluded - employing 20 persons or more, based in the European Union.

Dun & Bradstreet prepared the lists of companies, which were qualified to be interviewed, by drawing a sample from their European databases. This sampling was made according to three criteria: the Country (15 levels), the size of the company (3 levels: 20-49, 50-249 and 250 employees or more), and the activity sector (4 levels: Construction, Industry, Services and Trade).

Within each of the 180 cells defined by these criteria, the sampling was made at random.

The total sample was distributed between these sampling "cells" in a way which does not follow the actual distribution of businesses within the European Internal Market: the small countries as well as the larger businesses were intentionally « over-sampled » in order to get significant results for each level of analysis, i.e.:

- the 15 Member States
- the 3 size of business categories
- the 4 activity sectors.

Of course, during the data processing, each cell in the cross distribution of the sample was re-weighted down or up to its real weight within the European Internal Market. Thus, the total results presented are not affected by over- and under-samplings, and are representative of the total universe examined.

The person interviewed in each company is a top-level executive (General Management, Administration or Financial Management). The interviewer checks the identity of this person, at the same time that he/she controls the accuracy of the enterprises characteristics, as delivered by Dun & Bradstreet, namely: the number of employed persons and the activity sector.

Tailles des échantillons

Les tailles d'échantillon vont de 100 à 300 entreprises selon les pays.

Ci-dessous nous présentons le nombre exact d'interviews réalisées dans chaque pays, et les conséquences de leur re- pondération lors du traitement des données de manière à obtenir des résultats représentatifs à chaque niveau de l'analyse.

Chaque tableau descriptif se lit de la manière suivante :

1. Dans la première colonne sont renseignées les fréquences absolues et relatives des interviews effectivement réalisées.
2. Dans la deuxième colonne sont renseignées les fréquences après redressement, selon les tailles d'entreprises et les secteurs d'activité. Ceci est fait au sein de chaque pays individuel, et la structure entre pays ne change pas du tout. C'est ce redressement qui est utilisé pour présenter tous les résultats pays par pays, par exemple dans les "Volumes A" (voir ci-dessous).
3. Dans la troisième colonne sont renseignées les fréquences après la pondération faite pour corriger la sur- représentation accordée aux petits pays. On peut constater les changements de structure considérables intervenus sur le critère "pays". La structure selon les tailles d'entreprises et les secteurs d'activités ne restent pas inchangés (dans la mesure où les profils de tailles et de secteurs ne sont pas strictement identiques dans tous les pays), mais les changements sont marginaux. C'est cette pondération qui est utilisée pour présenter les résultats du total du Marché Intérieur Européen (Colonne Total des "Volumes A", et l'ensemble des "Volumes B").

Sizes of the samples

The sample sizes range from 100 up to 300 businesses, depending on the countries.

Hereafter are presented the exact number of interviews conducted in each country, and the consequences of re-weighting this sample during the data-processing, in order to get representative results at each level of analysis.

Each of these sample description tables gives:

1. In the first column one gets the absolute and relative frequencies of the interviews as they have been conducted.
2. In the second column one gets the weighted sample, according to size and sector of activity. This is done for each country and the interview frequencies remains unchanged. This "redressed" sample is used to present all results at the national level (i.e.: the country breakdown presented in the "Volumes A", as described later).
3. In the third column one gets the structure of the sample when the over-sampling of the small countries has been removed. Now one will notice that the interviews frequencies in each country changed considerably, but that the "Sizes" as well as the "Sectors" structures are only marginally affected (because the sizes and sectors of the businesses are not identically distributed in each country). This "weighted" sample is used to present all the results at the European Union level (i.e.: the Total column of the "Volumes A", and all the results presented in the "Volumes B").

	Interviews CONDUCTED		Sample REDRESSED		Sample WEIGHTED EU15	
TOTAL EU 15	3010	100%	3010	100%	3010	100%
BELGIQUE	200	6,6%	200	6,6%	63	2,1%
DANMARK	203	6,7%	203	6,7%	40	1,3%
DEUTSCHLAND	300	10,0%	300	10,0%	951	31,6%
ELLAS	100	3,3%	100	3,3%	41	1,4%
ESPANA	300	10,0%	300	10,0%	284	9,4%
FINLAND	100	3,3%	100	3,3%	31	1,0%
FRANCE	300	10,0%	300	10,0%	380	12,6%
IRELAND	99	3,3%	99	3,3%	23	0,8%
ITALIA	300	10,0%	300	10,0%	377	12,5%
LUXEMBOURG	100	3,3%	100	3,3%	6	0,2%
NEDERLAND	208	6,9%	208	6,9%	136	4,5%
ÖSTERREICH	200	6,6%	200	6,6%	73	2,4%
PORTUGAL	100	3,3%	100	3,3%	95	3,2%
SWEDEN	200	6,6%	200	6,6%	59	2,0%
UNITED KINGDOM	300	10,0%	300	10,0%	452	15,0%
SECTEUR D'ACTIVITE - ACTIVITY SECTOR						
Industries - Industry	975	32,4%	905	30,1%	891	29,6%
Construction	382	12,7%	378	12,6%	374	12,4%
Commerce - Trade	706	23,5%	777	25,8%	701	23,3%
Services	945	31,4%	951	31,6%	1044	34,7%
Taille (Emploi) – Size (employment)						
PME de 20-49 emplois / SME with 20-49 employees	1920	63,8%	2143	71,2%	2178	72,4%
PME de 50-249 emplois / SME with 50-249 employees	652	21,7%	710	23,6%	677	22,5%
250 emplois et plus / 250 employees and more	438	14,6%	157	5,2%	155	5,1%
Existe depuis – Active since						
Plus de 30 ans / More than 30 years	1567	52,1%	1510	50,2%	1392	46,3%
De 11 à 30 ans / 11 to 30 years	974	32,4%	1011	33,6%	997	33,1%
10 ans ou moins / 10 years or less	465	15,5%	487	16,2%	619	20,6%
% exportés – exports %						
0% : rien / 0% - Nothing	1473	50,6%	1522	52,2%	1569	54,3%
Moins de 50 % / Less than 50%	997	34,2%	1000	34,3%	979	33,9%
50% ou plus / 50% or more	442	15,2%	391	13,4%	339	11,7%

Tableaux de résultats

* VOLUME A : PAYS PAR PAYS

Le VOLUME A présente les résultats de l'Union Européenne analysés Pays par Pays. Chaque tableau est complété du TOTAL MARGINAL PONDERE, comme expliqué ci-dessus.

* VOLUME B : DESCRIPTIFS DES ENTREPRISES

Le VOLUME B présente les résultats de l'Union Européenne (15 Etats Membres), analysés pour quelques caractéristiques essentielles des entreprises considérées :

- Catégories de Taille et de Secteur d'activité
- Ancienneté de l'entreprise
- Importance des exportations dans les ventes

* VOLUME C : DESCRIPTIFS DES ENTREPRISES

Idem Volume B, mais pays par pays

Valeur statistique des résultats

Les résultats d'un sondage ne sont jamais valables que dans les limites d'une marge statistique d'échantillonnage. Cette marge est plus ou moins grande, et dépend de trois choses :

1. La taille de l'échantillon (ou de la partie d'échantillon que l'on analyse) : plus le nombre de répondants est grand, plus la marge statistique est petite ;
2. Le résultat lui-même : plus le résultat est proche de 50%, plus la marge statistique est grande ;
3. Le degré de certitude que l'on exige : plus on est sévère, plus la marge statistique est grande.

A titre d'exemple, prenons un cas imaginaire :

1. 500 personnes ont répondu à une question ;
2. Le résultat analysé est de 50 % environ ;
3. On choisit un degré de certitude de 95 % (c'est le niveau le plus utilisé par les statisticiens, et c'est celui adopté pour la table ci-dessus) ;

Dans ce cas illustratif la marge statistique est de : (+/- 4.4%) autour des 50% observés. Et en conclusion : le résultat pour la population totale se situe entre 45.6% et 54.4%.

Nous reproduisons ci-dessous les marges statistiques calculées pour différents échantillons et différents résultats observés, au degré de certitude de 95%.

MARGES STATISTIQUES D'ECHANTILLONNAGE (AU NIVEAU DE CONFIANCE DE 95 %)

Différentes tailles d'échantillon sont en lignes ;
Différents résultats observés sont en colonnes :

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%
n=50	6.0	8.3	9.9	11.1	12.0	12.7	13.2	13.6	13.8	13.9
n=75	4.9	6.8	8.1	9.1	9.8	10.4	10.8	11.1	11.3	11.3
n=100	4.3	5.9	7.0	7.8	8.5	8.9	9.3	9.6	9.8	9.8
n=150	3.5	4.8	5.7	6.4	6.9	7.3	7.6	7.8	8.0	8.0
n=200	3.0	4.2	4.9	5.5	6.0	6.4	6.6	6.8	6.9	6.9
n=250	2.7	3.7	4.4	5.0	5.4	5.7	5.9	6.1	6.2	6.2
n=300	2.5	3.4	4.0	4.5	4.9	5.2	5.4	5.5	5.6	5.7
n=400	2.1	2.9	3.5	3.9	4.2	4.5	4.7	4.8	4.9	4.9
n=500	1.9	2.6	3.1	3.5	3.8	4.0	4.2	4.3	4.4	4.4
n=600	1.7	2.4	2.9	3.2	3.5	3.7	3.8	3.9	4.0	4.0
n=700	1.6	2.2	2.7	3.0	3.2	3.4	3.5	3.6	3.7	3.7
n=800	1.5	2.1	2.5	2.8	3.0	3.2	3.3	3.4	3.5	3.5
n=900	1.4	2.0	2.3	2.6	2.8	3.0	3.1	3.2	3.3	3.3
n=1000	1.4	1.9	2.2	2.5	2.7	2.8	3.0	3.0	3.1	3.1
n=1500	1.1	1.5	1.8	2.0	2.2	2.3	2.4	2.5	2.5	2.5
n=2000	1.0	1.3	1.6	1.8	1.9	2.1	2.1	2.2	2.2	2.2
n=2500	0.9	1.2	1.4	1.6	1.7	1.8	1.9	2.0	2.0	2.0
n=3000	0.8	1.1	1.3	1.4	1.5	1.6	1.7	1.8	1.8	1.8
n=5000	0.6	0.8	1.0	1.1	1.2	1.3	1.4	1.4	1.4	1.4
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%

Tables of results

* VOLUME A : COUNTRY BY COUNTRY

The VOLUME A presents the results analysed Country by Country. Each table is completed by the MARGINAL WEIGHTED TOTAL (as explained above).

* VOLUME B : CHARACTERISTICS OF THE ENTERPRISES

The VOLUME B presents the results for the European Union (15 Member States) analyzed for some important characteristics of the selected enterprises :

- Size & Sectors categories
- Number of years of existence
- Proportion of total sales in exports

* VOLUME C : CHARACTERISTICS OF THE ENTERPRISES

Same as Volume B, but country by country

Statistical significance of the results

The results in a survey are valid only between the limits of a statistical margin caused by the sampling process. This margin varies with three factors:

1. The sample size (or the size of the analyzed part in the sample) : the greater the number of respondents, the smaller the statistical margin ;
2. The result in itself: the more the result approaches 50%, the wider the statistical margin will be ;
3. The desired degree of confidence: the more "strict" we are, the wider the statistical margin will be.

As an example, examine this illustrative case:

1. One question has been answered by 500 people;
2. The analyzed result is around 50% ;
3. We choose a significance level of 95 % (it is the level most often used by the statisticians, and it is the one chosen for the table here above) ;

In this illustrative case the statistical margin is : (+/- 4.4%) around the observed 50%. And as a conclusion: the result for the whole population lies between 45.6% 54.4 %.

Below we reproduce the statistical margins computed for various observed results, on various sample sizes, at the 95% significance level.

STATISTICAL MARGINS DUE TO THE SAMPLING PROCESS (AT THE 95 % LEVEL OF CONFIDENCE)

Various sample sizes are in rows;

Various observed results are in columns:

	55%	60%	65%	70%	75%	80%	85%	90%	95%	
n=50	13.8	13.6	13.2	12.7	12.0	11.1	9.9	8.3	6.0	n=50
n=75	11.3	11.1	10.8	10.4	9.8	9.1	8.1	6.8	4.9	n=75
n=100	9.8	9.6	9.3	8.9	8.5	7.8	7.0	5.9	4.3	n=100
n=150	8.0	7.8	7.6	7.3	6.9	6.4	5.7	4.8	3.5	n=150
n=200	6.9	6.8	6.6	6.4	6.0	5.5	4.9	4.2	3.0	n=200
n=250	6.2	6.1	5.9	5.7	5.4	5.0	4.4	3.7	2.7	n=250
n=300	5.6	5.5	5.4	5.2	4.9	4.5	4.0	3.4	2.5	n=300
n=400	4.9	4.8	4.7	4.5	4.2	3.9	3.5	2.9	2.1	n=400
n=500	4.4	4.3	4.2	4.0	3.8	3.5	3.1	2.6	1.9	n=500
n=600	4.0	3.9	3.8	3.7	3.5	3.2	2.9	2.4	1.7	n=600
n=700	3.7	3.6	3.5	3.4	3.2	3.0	2.7	2.2	1.6	n=700
n=800	3.5	3.4	3.3	3.2	3.0	2.8	2.5	2.1	1.5	n=800
n=900	3.3	3.2	3.1	3.0	2.8	2.6	2.3	2.0	1.4	n=900
n=1000	3.1	3.0	3.0	2.8	2.7	2.5	2.2	1.9	1.4	n=1000
n=1500	2.5	2.5	2.4	2.3	2.2	2.0	1.8	1.5	1.1	n=1500
n=2000	2.2	2.2	2.1	2.1	1.9	1.8	1.6	1.3	1.0	n=2000
n=2500	2.0	2.0	1.9	1.8	1.7	1.6	1.4	1.2	0.9	n=2500
n=3000	1.8	1.8	1.7	1.6	1.5	1.4	1.3	1.1	0.8	n=3000
n=5000	1.4	1.4	1.4	1.3	1.2	1.1	1.0	0.8	0.6	n=5000
	55%	60%	65%	70%	75%	80%	85%	90%	95%	

Questionnaire



CONFIDENTIEL

FLASH EUROBAROMETRE N° 144 (5011LVTLBA) - septembre 2003
Version française 08.07.2003

INFORMATIONS A PREPARER AVANT L'INTERVIEW

- (a) REGION NUTS : (CODER SELON LOCALITE D&B)
(b) CODE SIC ou NACE : (SELON D&B)
(c) NOMBRE DE TRAVAILLEURS : (SELON D&B)

Nous effectuons une étude sur l'innovation actuelle en Europe. Nous souhaiterions vous poser quelques questions sur vos expériences et priorités en la matière.

Tout d'abord, j'ai besoin de quelques informations concernant votre entreprise.

D1. Combien de personnes votre entreprise emploie-t-elle régulièrement en **[NOTRE PAYS]**?

N = [] [] [] [] [] [] [] []

[SI MOINS DE 20 PERSONNES EMPLOYEES > STOP INTERVIEW]

[SI NSP/SR > STOP INTERVIEW]

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INFORMATION TO BE PREPARED BEFORE INTERVIEW

- (a) NUTS REGION: (CODE ACCORDING TO D&B LOCALITY)
(b) SIC or NACE CODE: (ACCORDING TO D&B)
(c) COMPANY SIZE : (ACCORDING D&B)

We are conducting a survey on innovation today in Europe. We would like to ask you about your experiences and priorities in this area.

First of all I need some information on your company.

D1. How many people does your company consistently employ in **[OUR COUNTRY]**?

N = [] [] [] [] [] [] [] []

[IF LESS THAN 20 PEOPLE EMPLOYED > STOP INTERVIEW]

[IF DK/NA > STOP INTERVIEW]

D2. Votre entreprise est-elle principalement une entreprise : ...?

[LIRE - UNE SEULE RÉPONSE POSSIBLE]

- d'extraction ou de production de matières premières 1
- de construction ou de travaux publics 2
- de production et de fabrication de biens 3
- de commerce et de distribution (en gros ou au détail) 4
- de transports (de biens, marchandises ou personnes) 5
- de services financiers (banques, assurances, courtage) 6
- de communication 7
- d'autres services aux entreprises 8
- d'autres services aux consommateurs 9
- (aucun de ces cas) **[PRECISER]** 10

- **[Agriculture → STOP INTERVIEW]**
- **[Administration publique → STOP INTERVIEW]**
- **[NSP/SR → STOP INTERVIEW]**

D3. Depuis quand votre entreprise existe-t-elle?

[LIRE - UNE SEULE RÉPONSE POSSIBLE]

- fondée avant 1973 (depuis plus de 30 ans) 1
- fondée entre 1973 et 1982 (depuis plus de 20ans) 2
- fondée entre 1983 et 1992 (depuis plus de 10ans) 3
- fondée entre 1993 et 1997 (depuis plus de 5ans) 4
- fondée depuis 1998 (au cours des 5 dernières années) 5
- **[NSP/SR]** 6

D4. Quel est approximativement le pourcentage de vos ventes que votre société réalise à l'exportation?

[SI « NE SAIT PAS EXACTEMENT », INSISTER POUR OBTENIR UNE APPROXIMATION]

- [] [] [] [] %
- **[SI NSP/SR > CODER 999]**

D2. Is your company mainly concerned with: ...?

[READ OUT – ONLY ONE ANSWER]

- extraction or production of raw materials 1
- construction or civil engineering 2
- production and manufacturing of goods 3
- trade and distribution (wholesale or retail) 4
- transport (of goods, merchandise or people) 5
- financial services (banking, insurance, brokerage) 6
- communications 7
- other services to businesses 8
- other services to consumers 9
- (none of these cases) **[SPECIFY]** 10

- **[Agriculture → STOP INTERVIEW]**
- **[Public Administration → STOP INTERVIEW]**
- **[DK/NA → STOP INTERVIEW]**

D3. Since when does your company exist?

[READ OUT – ONLY ONE ANSWER]

- founded before 1973 (more than 30 years) 1
- founded between 1973 and 1982 (more than 20 years) 2
- founded between 1983 and 1992 (more than 10 years) 3
- founded between 1993 and 1997 (more than 5 years) 4
- founded since 1998 (within the last 5 years) 5
- **[DK/NA]** 6

D4. Approximately what percentage of your sales does your company make in exports?

[IF DON'T KNOW EXACTLY, INSIST ON GETTING AN ESTIMATE]

- [] [] [] [] %
- **[IF DK/NA > CODE 999]**

D5. Quel pourcentage de votre chiffre d'affaires votre entreprise réalise-t-elle par des échanges commerciaux avec d'autres sociétés ?

[SI « NE SAIT PAS EXACTEMENT », INSISTER POUR OBTENIR UNE APPROXIMATION]

- [][][][] %
- **[SI NSP/SR > CODER 999]**

D6. Quel pourcentage de votre chiffre d'affaire votre société réalise-t-elle par des échanges commerciaux avec des consommateurs ?

[SI « NE SAIT PAS EXACTEMENT », INSISTER POUR OBTENIR UNE APPROXIMATION]

- [][][][] %
- **[SI NSP/SR > CODER 999]**

[VERIFIER QUE LA SOMME DE D5 ET D6 EST EGALE A 100%]

D5. What percentage of your turnover does your company generate from trade with other firms?

[IF DON'T KNOW EXACTLY, INSIST ON GETTING AN ESTIMATE]

- [][][][] %
- **[IF DK/NA > CODE 999]**

D6. What percentage of your turnover does your company generate from trade with consumers?

[IF DON'T KNOW EXACTLY, INSIST ON GETTING AN ESTIMATE]

- [][][][] %
- **[IF DK/NA > CODE 999]**

[CHECK THAT THE SUM OF D5 AND D6 IS EQUAL TO 100%]

1. Pour commencer, parlons globalement des efforts d'innovation de votre entreprise, de ses motivations et réalisations au cours des deux dernières années.
- 1.1 Selon vous, quel est le pourcentage approximatif de votre chiffre d'affaires réalisé par des produits ou services nouveaux ou renouvelés, mis sur le marché au cours des deux dernières années ?

[LIRE – UNE SEULE REPONSE]

- | | |
|----------------------|---|
| a) 0% | 1 |
| b) 1-5% | 2 |
| c) 6-10% | 3 |
| d) 11-20% | 4 |
| e) 21-50% | 5 |
| f) 51% ou plus | 6 |
| g) (NSP/SR) | 7 |

- TREND MODIFIEE FLASH-EB 129, Q1.1 -

- 1.2 Durant ces deux dernières années, quel a été le pourcentage approximatif de vos investissements consacré à l'innovation, que ce soit pour vos produits, vos procédés ou votre organisation ?

[LIRE – UNE SEULE REPONSE]

- | | |
|----------------------|---|
| a) 0% | 1 |
| b) 1-5% | 2 |
| c) 6-10% | 3 |
| d) 11-20% | 4 |
| e) 21-50% | 5 |
| f) 51% ou plus | 6 |
| g) (NSP/SR) | 7 |

- TREND MODIFIEE FLASH-EB 129, Q1.2 -

1. Let us now begin with your company's overall efforts and achievements in innovation during the last two years.
- 1.1 In your opinion, approximately what percentage of your turnover comes from new or renewed products or services, introduced during the last two years?

[READ OUT – ONE ANSWER ONLY]

- | | |
|----------------------|---|
| a) 0% | 1 |
| b) 1-5% | 2 |
| c) 6-10% | 3 |
| d) 11-20% | 4 |
| e) 21-50% | 5 |
| f) 51% or more | 6 |
| g) (DK/NA) | 7 |

- MODIFIED TREND FLASH-EB 129, Q1.1 -

- 1.2 In the last two years, approximately what percentage of your investment was dedicated to innovation, either in your products, processes or organisation?

[READ OUT – ONE ANSWER ONLY]

- | | |
|----------------------|---|
| a) 0% | 1 |
| b) 1-5% | 2 |
| c) 6-10% | 3 |
| d) 11-20% | 4 |
| e) 21-50% | 5 |
| f) 51% or more | 6 |
| g) (DK/NA) | 7 |

- MODIFIED TREND FLASH-EB 129, Q1.2 -

1.3 Lesquels des facteurs suivants ont incité le plus votre entreprise à innover au cours de ces deux dernières années ? Premièrement, Deuxièmement ?

- a) Premièrement..... 1 2 3 4 5 6 7
b) Deuxièmement..... 1 2 3 4 5 6 7

[LIRE – ROTATION – UNE REPONSE POUR « PREMIEREMENT » ET UNE REPONSE POUR « DEUXIEMEMENT » ATTENDUES]

- La réponse aux besoins des consommateurs 1
- L'augmentation de la concurrence au niveau des prix..... 2
- L'augmentation de la concurrence au niveau des produits 3
- Les mesures de conformité aux nouvelles obligations réglementaires ou légales 4
- Le besoin d'améliorer le niveau de productivité du personnel... 5
- Le besoin d'améliorer l'efficacité des machines et des équipements..... 6
- (NSP/SR)..... 7

- NOUVELLE QUESTION -

1.4 Nous aimerions savoir quels sont, dans votre entreprise, les deux principaux besoins en matière d'innovation non satisfaits, parmi les suivants... ?

[LIRE – ROTATION – DEUX REPONSES ATTENDUES]

- a) Trouver ou mobiliser des ressources humaines 1
b) Accéder à des clients et/ou des marchés innovants..... 2
c) Trouver ou utiliser de nouvelles technologies 3
d) Trouver ou mobiliser des ressources financières 4
e) Partager ses connaissances ou coopérer avec d'autres organisations 5
f) Protéger vos connaissances 6
g) [NE PAS LIRE Aucun de ces besoins mais plutôt:] [PRECISER]..... 7
h) [NE PAS LIRE Aucun besoin n'est plus important que les autres]8
i) (NSP/SR)..... 9

– TREND FLASH-EB 129, Q2.3 –

1.3 Which of the following factors provided the strongest incentives for your company to innovate over the last two years? Firstly? Secondly?

- a) Firstly 1 2 3 4 5 6 7
b) Secondly 1 2 3 4 5 6 7

[READ OUT – ROTATE – ONE ANSWER FOR “FIRSTLY” AND ONE ANSWER FOR “SECONDLY” EXPECTED]

- response to consumer needs 1
- increasing price competition 2
- increasing product competition 3
- compliance measures in response to new regulatory or legislative obligations 4
- need to improve the productivity level of personnel 5
- need to improve the efficiency of machinery and equipment 6
- (DK/NA) 7

- NEW QUESTION -

1.4 We would like to know what are the two most important unsatisfied needs in terms of innovation in your company, amongst the following ...?

[READ OUT – ROTATE – TWO ANSWERS EXPECTED]

- a) Finding or mobilising human resources 1
b) Accessing innovative customers and/or markets 2
c) Finding or using new technologies 3
d) Finding or mobilising financial resources..... 4
e) Knowledge sharing or networking..... 5
f) Protecting your knowledge 6
g) [DON'T READ OUT none of these, but this one is]: [SPECIFY]. 7
h) [DON'T READ OUT no need more important than the other]..... 8
i) (DK/NA)..... 9

– TREND FLASH-EB 129, Q2.3 –

- 1.5** Chacun des moyens suivants peuvent être appropriés pour que votre entreprise accède aux technologies de pointe. Pour chacun de ces moyens, pourriez-vous juger de quelle manière cela est satisfaisant ou insatisfaisant pour accéder aux technologies de pointe?

[LIRE – ROTATION –UNE REPONSE PAR ITEM]

- plutôt satisfaisant..... 1
- plutôt insatisfaisant 2
- (ni satisfaisant ni insatisfaisant) 3
- (NSP/SR)..... 4

- a) L'acquisition de machines et d'équipements de pointe
- b) La collaboration avec des fournisseurs ou des clients
- c) La Recherche et le Développement en interne
- d) La collaboration avec des universités ou des spécialistes de R&D
- e) L'acquisition de propriété intellectuelle externe (l'achat de licences)

- NOUVELLE QUESTION -

- 1.6** Comparé à il y a deux ans, considérez-vous que la capacité de votre entreprise à innover...?

[LIRE – UNE SEULE REPONSE]

- s'est améliorée 1
- s'est détériorée 2
- est restée identique 3
- (NSP/SR)..... 4

- NOUVELLE QUESTION -

- 1.5** Each of the following means may be of relevance to your company in accessing advanced technologies. For each of these means, could you rate how satisfactory or unsatisfactory it is in accessing advanced technologies?

[READ OUT – ROTATE–ONE ANSWER PER ITEM]

- rather satisfactory 1
- rather unsatisfactory 2
- (neither satisfactory nor unsatisfactory) 3
- [DK/NA] 4

- a) acquisition of advanced machinery and equipment
- b) co-operation with suppliers or customers
- c) conducting in-house R&D
- d) co-operation with universities or R&D specialists
- e) acquisition of external intellectual property (purchasing of licences)

- NEW QUESTION–

- 1.6** Compared to two years ago, do you consider that your company's capacity to innovate is...?

[READ OUT – ONE ANSWER ONLY]

- improving 1
- deteriorating 2
- remains unchanged 3
- (DK/NA)..... 4

- NEW QUESTION -

Parlons maintenant des expériences antérieures de votre société avec des intervenants impliqués à différents niveaux de votre effort en matière d'innovation....

- 2.1** En ce qui concerne l'expérience de votre entreprise en matière d'innovation, pouvez-vous me dire si vous êtes plutôt satisfait ou plutôt insatisfait du soutien des institutions ou organisations suivantes ?

[LIRE – ROTATION–UNE REPONSE PAR ITEM]

- plutôt satisfait 1
- plutôt insatisfait 2
- (ni satisfait ni insatisfait) 3
- (NSP/SR)..... 4

- a) Les Chambres de commerce 1 2 3 4
- b) Les banques..... 1 2 3 4
- c) Les compagnies d'assurances 1 2 3 4
- d) Les comptables 1 2 3 4
- e) Les associations professionnelles..... 1 2 3 4
- f) Les syndicats..... 1 2 3 4
- g) Votre personnel 1 2 3 4
- h) Les organismes nationaux qui délivrent les brevets 1 2 3 4
- i) Les institutions européennes 1 2 3 4
- j) Les autorités nationales 1 2 3 4

- NOUVELLE QUESTION -

Turning now to your firms' past experiences with parties implicated in various stages of your innovative effort....

- 2.1** In terms of your company's experience in innovation, could you tell me if you are rather satisfied or rather dissatisfied with the support of the following institutions or groups?

[READ OUT – ROTATE–ONE ANSWER PER ITEM]

- rather satisfied 1
- rather dissatisfied 2
- (neither satisfied nor dissatisfied) 3
- (DK/NA)..... 4

- a) Chambers of Commerce 1 2 3 4
- b) Banks..... 1 2 3 4
- c) Insurance companies 1 2 3 4
- d) Accountants..... 1 2 3 4
- e) Professional associations..... 1 2 3 4
- f) Trade unions..... 1 2 3 4
- g) Your staff 1 2 3 4
- h) National bodies granting patents..... 1 2 3 4
- i) European Institutions..... 1 2 3 4
- j) National authorities..... 1 2 3 4

- NEW QUESTION -

Parlons de l'innovation en termes de nouvelles approches organisationnelles et de gestion dans votre entreprise.

3.1 Au cours des deux prochaines années, sur quelles nouvelles approches de gestion de l'innovation votre entreprise se concentrera-t-elle principalement parmi les suivantes? Premièrement ? Deuxièmement ?

- a) Premièrement 1 2 3 4 5 6 7
b) Deuxièmement 1 2 3 4 5 6 7

[LIRE- ROTATION-UNE REPONSE POUR « PREMIEREMENT » ET UNE REPONSE POUR « DEUXIEMEMENT » ATTENDUES]

- l'introduction des nouveaux processus technologiques 1
- les relations avec les fournisseurs/utilisateurs 2
- la logistique, la méthode de livraison 3
- les nouvelles caractéristiques des produits/services 4
- le traitement des données et de l'information 5
- la restructuration du processus pour la prise de décisions 6
- [NSP/SR] 7

- TREND MODIFIEE FLASH-EB 129, Q4.1 -

3.2 Si vous souhaitiez introduire de nouvelles méthodes ou de nouvelles approches de gestion dans votre entreprise, vous cherchiez de préférence conseil auprès de... ?

[LIRE - ROTATION -UNE SEULE REPONSE]

- Fournisseurs ou clients 1
- Institutions de recherche (public ou privé) 2
- Consultants externes privés 3
- Centres de conseil publics ou semi-publics 4
- [NSP/SR] 5

- TREND FLASH-EB 129, Q4.2 -

Let us talk about innovation in terms of new organisational and managerial approaches in your company.

3.1 During the next two years, on which of the following new approaches to management of innovation will your company mainly focus? Firstly? Secondly?

- a) Firstly 1 2 3 4 5 6 7
b) Secondly 1 2 3 4 5 6 7

[READ OUT - ROTATE-ONE ANSWER FOR "FIRSTLY" AND ONE ANSWER FOR "SECONDLY" EXPECTED]

- introduction of new process technologies 1
- relationship with suppliers/users 2
- logistics, delivery method 3
- new product/service characteristics 4
- data and information processing 5
- restructuring of decision-making process 6
- [DK/NA] 7

- TREND MODIFIED FLASH-EB 129, Q4.1 -

3.2 If you want to introduce new methods or new approaches to management for your company, would you seek advice preferably from... ?

[READ OUT - ROTATE-ONE ANSWER ONLY]

- suppliers or customers 1
- research institutions (public or private) 2
- private external consultants 3
- public or semi-public advisory centres 4
- [DK/NA] 5

- TREND FLASH-EB 129, Q4.2 -

4.1 A votre avis, la création d'un brevet communautaire, qui harmonisera la législation de la propriété intellectuelle au sein de l'Union européenne, est très efficace, plutôt efficace, plutôt pas efficace ou pas du tout efficace pour encourager :

- très efficace 1
- plutôt efficace 2
- plutôt pas efficace 3
- pas du tout efficace 4
- (NSP/SR)..... 5

[LIRE – ROTATION – UNE REPONSE PAR ITEM]

- a) les entreprises, en général, à innover 1 2 3 4 5
- b) votre entreprise à innover..... 1 2 3 4 5

- NOUVELLE QUESTION -

4.1 In your opinion, the creation of a Community patent, which will harmonise intellectual property legislation throughout the European Union, is very effective, rather effective, rather ineffective or not effective at all for encouraging...

- very effective 1
- rather effective 2
- rather ineffective 3
- not effective at all 4
- (DK/NA)..... 5

[READ OUT – ROTATE – ONE ANSWER PER ITEM]

- a) companies in general to innovate 1 2 3 4 5
- b) your company to innovate 1 2 3 4 5

- NEW QUESTION -

- 5.1** Pour chacune des propositions suivantes, pouvez-vous me dire si vous êtes tout à fait d'accord, plutôt d'accord, plutôt pas d'accord ou pas du tout d'accord ?

[LIRE – ROTATION – UNE SEULE REPONSE PAR ITEM]

- tout à fait d'accord 1
 - plutôt d'accord 2
 - plutôt pas d'accord 3
 - pas du tout d'accord 4
 - (NSP/SR)..... 5
- a) Comme le temps requis à partir de la conception et la production d'un nouveau produit ou service jusqu'à son lancement sur le marché devient de plus en plus court, les entreprises doivent continuer à accroître leurs efforts en matière d'innovation.... 1 2 3 4 5
- b) En considérant le marché dans lequel votre entreprise opère aujourd'hui, vous êtes obligé d'innover..... 1 2 3 4 5
- c) La globalisation des marchés constitue une opportunité pour innover..... 1 2 3 4 5

- NOUVELLE QUESTION -

- 5.2** Par rapport à la situation actuelle, pensez-vous que pour l'introduction de produits innovants dans les prochaines années, votre marché ...

[LIRE – UNE SEULE REPONSE]

- sera plus « réceptif » 1
- demeurera identique 2
- sera moins « réceptif » 3
- (NSP/SR) 4

- TREND FLASH-EB 129, Q7.1 -

- 5.1** For each of the following propositions, could you tell me if you totally agree, rather agree, rather disagree or totally disagree ?

[READ OUT – ROTATE – ONE ANSWER ONLY PER ITEM]

- totally agree 1
 - rather agree 2
 - rather disagree 3
 - totally disagree 4
 - (DK/NA)..... 5
- a) Since the time required from the conception and the production of a new product or service to its launch on the market is becoming shorter and shorter, companies should continue to increase their efforts in innovation 1 2 3 4 5
- b) Looking at the market your company is operating in today you are obliged to innovate..... 1 2 3 4 5
- c) Globalisation of markets is an opportunity for innovation 1 2 3 4 5

- NEW QUESTION -

- 5.2** Compared to the current situation, would you expect that your market for introducing innovative products in the coming years...

[READ OUT – ONE ANSWER ONLY]

- Will become more receptive..... 1
- Will remain unchanged..... 2
- Will become less receptive..... 3
- (DK/NA) 4

- TREND FLASH-EB 129, Q7.1 -

- 5.3** Dans les années à venir, pour votre entreprise, à quel niveau pensez-vous que se situeront les deux impacts les plus positifs du marché unique européen en ce qui concerne l'innovation... ? (citer les deux impacts les plus importants)

[LIRE – ROTATION –DEUX REPONSES ATTENDUES]

- a) Des fournitures davantage disponibles ou moins coûteuses provenant d'autres régions d'Europe 1
- b) Un meilleur accès à de nouveaux marchés au sein de l'Union européenne (pour la vente de produits et de services) 2
- c) Un meilleur accès aux nouvelles technologies, aux nouveaux équipements ou résultats de recherche 3
- d) Des réglementations améliorées, offrant des chances égales aux concurrents nationaux ou étrangers 4
- e) Une meilleure coopération avec d'autres entreprises européennes pour innover 5
- f) (Autres) [PRECISER] 6
- g) (NSP/SR) 7

- TREND FLASH-EB 129, Q8 -

[FIN DE L'INTERVIEW – REMERCIER LE REpondant]

- 5.3** In the coming years, where would you expect for your company, the two most positive impacts of the European single market when it comes to innovation ...? (please name two most important impacts)

[READ OUT – ROTATE–TWO ANSWERS EXPECTED]

- a) cheaper or better available supplies from other regions in Europe 1
- b) better access to new markets in the European Union (for sale of products and services) 2
- c) better access to new technologies, equipment or research results 3
- d) improved regulations, providing equal opportunities for competitors at home and abroad 4
- e) better co-operation with other European companies to innovate 5
- f) (others) [SPECIFY] 6
- g) (DK/NA) 7

- TREND FLASH-EB 129, Q8 -

[END OF INTERVIEW – THANK INTERVIEWEE]