



Flash Eurobarometer 433

Report

Innobarometer 2016 – EU business innovation trends

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February 2016
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Survey requested by the European Commission,
Directorate-General for Internal Market, Industry, Entrepreneurship and
SMEs and co-ordinated by the Directorate-General for Communication

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(DG COMM "Strategy, Corporate Communication Actions and Eurobarometer" Unit)

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INTRODUCTION

In order for Europe to remain competitive in the global economy and improve the quality of life of its citizens, innovation is an essential element. Recognition of this importance is underlined by the work the European Commission is currently undertaking to implement policies and programs to support the development of innovation. Among these initiatives, it is worth mentioning the formation of the Innovation Union to create an innovation-friendly environment, which makes it easier for innovative research and ideas to be turned into products and services that will bring the EU growth and jobs. The Innovation Union is seen as an investment for the EU's future: for instance, investing 3% of EU GDP into research and development by 2020 could potentially create 3.7 million jobs and increase the EU annual GDP by €795 billion by 2025¹.

As industry accounts for 80% of Europe's exports, the modernisation of industrial processes, technologies and business models, along with improving the commercialisation of innovative goods and services, is key to making progress towards increasing the competitiveness and opportunities for European businesses within the EU. Previous Innobarometer studies have shown that companies that prioritise innovation are also those that experience the highest increase in turnover.

The Flash Innobarometer is a survey on current activities and attitudes related to innovation. Each year it gathers opinions and feedback from European businesses, providing a unique source of information about innovation in the EU for policy makers. The 2016 survey captures the main behaviours and trends in innovation-related activities within EU businesses. Carried out in 28 EU countries, as well as Switzerland and the United States of America, the survey explores the following areas:

- Profiles of companies developing innovations - exploring what types of innovations have been introduced and the proportion of turnover these innovative activities represent, as well as how much has been invested into various business activities;
- Problems encountered with the commercialisation of innovative and non-innovative goods or services – what are the barriers and have they changed since previous surveys;
- Public support for the commercialisation of goods and services – what type of support could have the most positive impact on a company's innovation activities;
- Plans for future investment in innovation by companies and the reasons why;
- The role of design in a company's strategy and use of advanced manufacturing technologies;
- The future of innovation and its impact.

Where possible, comparisons with the previous survey will be made².

This survey was carried out by TNS Political & Social network in the 28 Member States of the European Union, Switzerland and the United States between the 1st and 19th February, 2016. There were 14,117 companies interviewed, of which 13,117 are from the 28 EU Member states, and 500 each from Switzerland and the United States. The sample comprises companies employing 1 or more persons in manufacturing (NACE category C), services (NACE categories G, H, I, J, K, L, M, N, R) and the industry sector (NACE categories D, E, F). The sample was selected from an international database, with additional sample from local sources where necessary.

¹ http://ec.europa.eu/research/innovation-union/index_en.cfm?pg=why – Why do we need an Innovation Union.

² This survey follows the Innobarometer survey conducted in February 2015 http://ec.europa.eu/growth/industry/innovation/facts-figures/innobarometer/index_en.htm

Interviews were conducted with key decision makers of companies via telephone in their mother tongue on behalf of the European Commission, DG Internal Market, Industry, Entrepreneurship and SMEs. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication (“Strategy, Corporate Communications Actions and Eurobarometer” Unit).

A technical note on the manner in which interviews were conducted by the Institutes with the TNS Political & Social network is appended as an annex to this report. Also included are the interview methods and confidence intervals³

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

Belgium	BE	Latvia	LV
Czech Republic	CZ	Luxembourg	LU
Bulgaria	BG	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Greece	EL	Poland	PL
Spain	ES	Portugal	PT
France	FR	Romania	RO
Croatia	HR	Slovenia	SI
Ireland	IE	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Lithuania	LT	United Kingdom	UK
European Union – weighted average for the 28 Member States			EU28

* Cyprus as a whole is one of the 28 European Union Member States. However, the ‘acquis communautaire’ has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the ‘CY’ category and in the EU28 average.

*We wish to thank the people throughout the European Union
who have given their time to take part in this survey.*

Without their active participation, this study would not have been possible.

³ The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

KEY FINDINGS

PROFILES OF COMPANIES DEVELOPING INNOVATIONS

- More than two thirds of EU companies have introduced at least one innovation since January 2013 (67%) – a decrease of five percentage points since the survey in 2015, but slightly ahead (+1 pp) of results in 2014.
- Four in ten EU companies have introduced new or significantly improved goods (40%) or new or significantly improved services (40%). At least three in ten EU companies have introduced new or significantly improved organizational methods (34%) or new or significantly improved marketing strategies (33%) or new or significantly improved processes (30%).
 - Compared to the last survey in 2015, companies are less likely to have introduced new or significantly improved services (-5 pp) and new or significantly improved organizational methods (-4 pp).
- For the majority of companies, innovative goods or services accounts for between 1% and 25% of their turnover (62%), while a further 17% say that they account for more than 26% of their turnover. Since the last survey in 2015, there has been very little change.
- Companies investing in innovation are most likely to have invested some turnover in the acquisition of machines, equipment, software or licenses (68%). More than half have invested in training (59%), company reputation and branding (56%) or business process improvements (51%).
 - Compared to 2015 results, companies are less likely to invest in training (- 5 pp) and slightly less likely to invest in research and development (-3 pp), software development (-3 pp) and company reputation and branding (-3 pp).

PROBLEMS AND PUBLIC SUPPORT RELATED TO THE COMMERCIALISATION OF (INNOVATIVE) GOODS OR SERVICES

- A market dominated by established competitors (65%) is most mentioned as a problem in the commercialization of their innovative goods or services by companies that have introduced innovative goods or services. Lack of financial services (58%), the cost and complexity of meeting regulations or standards (57%) and lack of human resources (49%) are also mentioned as problems during the process.
 - Since the survey in 2015, there are minor differences, the most notably, companies are more likely to say lack of human resources is a problem (+3 pp)
- Amongst companies that have not introduced innovative goods or services, established competitors is also a problem most mentioned by 54% of non innovative companies, followed by lack of financial resources (49%), and the cost and complexity of meeting regulations or standards (48%) in the commercialization of their goods or services..
 - Since 2015, companies are more likely to say lack of marketing expertise (+5 pp) and administrative and legal issues (+ 4 pp) are problems for the commercialization of goods or services.
- Companies that have introduced a goods or service since 2013, think public support for the training of staff in how to promote and market innovative goods or services (29%) would have the most impact on their company. At least a quarter of companies think public support in accessing or reinforcing selling online (26%), followed by 24% who say participating in conferences, trade fairs and exhibitions would make the most impact on the company in aiding the commercialization of their innovative goods or service.

- Compared to 2015 survey results, innovative companies are slightly more likely to think accessing or reinforcing selling online (+ 3 pp) would have a positive impact, and less likely to say accessing or reinforcing your presence in export markets (-3 pp).
- Of the companies that have not introduced an innovative goods or service since 2013, 21% also think public support for the training of staff in how to promote and market innovative goods or services would make the most positive impact, followed by support for meeting regulations and standards (18%) and accessing or reinforcing online selling (18%). Almost a third of non-innovation companies (30%) did not think any of the mentioned interventions would have a positive impact on their businesses. This compares with 15% of companies that have introduced an innovative goods or service.
 - Since the last survey in 2015, there are minor differences, however companies are slightly less likely to say training of staff would have a positive impact (-3 pp).

INVESTMENT IN INNOVATION

- More than two thirds of companies that have introduced at least one new innovation (72%, -1 pp) have made some investment towards innovation activities. More than one third (36%) of companies invested between 1 and 5% of their 2015 turnover, 17% invested more than 6% while 24% of companies invested 0% of their turnover.
- The majority of EU businesses, plan to maintain or increase the level of investment in innovation over the next 12 months; 28% plan to increase, 47% plan to keep the proportion unchanged.
 - Compared with 2015, there are minor changes, the largest from companies more likely to not invest in innovation over the next 12 months (+3 pp).
- The two main reasons for investing in innovation are to capitalize on market potential (40%, - 3 pp) and due to customer request (39%, +6 pp).
- The main reasons why companies decided not to invest in innovation are because they thought the investment wouldn't be profitable (30%) and lack of financial resources (28%).

THE ROLE OF DESIGN

- In more than six out of ten companies, design plays a role in some way; 18% say design is integral, but not a central element of development work in the company, 17% say it is not used systematically, 14% say it is used as a last finish and 12% say it is a central element in the company's strategy. More than a third say design is not used in the company (37%). There is little change since the previous survey.

USE OF ADVANCED MANUFACTURING TECHNOLOGIES

- More than one in ten manufacturing companies have used high performance manufacturing technologies (17%), sustainable manufacturing technologies (16%) and IT enabled intelligent manufacturing technologies (11%). However, the majority of manufacturing companies have not used any of these technologies (66%).
 - Compared with results from 2015, companies in 2016 are much less likely to have used all of these technologies; high performance manufacturing (-5 pp), sustainable manufacturing (-9 pp) and IT-enabled intelligent manufacturing (-2 pp). Companies are more likely not to have used any of these technologies (+14 pp).

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- Less than one in five manufacturing companies plan to use high performance technologies (19%, - 5 pp), sustainable manufacturing (15%, - 9 pp) or IT enabled intelligent manufacturing (10%, -4 pp), they are less likely to do so since the last survey in 2015.
- Overall, 61% of manufacturing companies have not used any of these technologies and have no plans in the next 12 months to do so. Companies in 2016, are more likely to say this than those surveyed in 2015 (+11 pp). This compares to 26% of companies who have used the technologies and plans to use these technologies over the next 12 months (26%, -9 pp).

SKILLS REQUIRED TO HELP COMPANIES' INNOVATION ACTIVITIES

- Marketing and technical skills are most mentioned by 28% and 24% of companies respectively that would help improve and support their company's innovation activities over the next two years, followed by financial skills (22%).
- Financial skills (22%) are most mentioned as a skill that could help kick-start and support the innovation activities for a company that hasn't innovated, followed by technical skills (17%).
- Overall, the most mentioned skills that could help improve and kick-start a company's innovation activities are marketing (24%), financial and technical (both 22%).

THE FUTURE OF INNOVATION

- Almost one in five companies think their innovation activities, 5 years from now will make a positive impact on job creation (19%), followed by lifelong learning and skills development (15%) and IT and the digital economy (14%), while 25% of companies do not plan to introduce any innovations over the next 5 years.

I. PROFILES OF COMPANIES DEVELOPING INNOVATIONS

This section of the report considers the types of innovations⁴ companies have introduced since early 2013. In addition, the proportion of a company’s turnover the innovations represent in 2015, and whether there has been a change since earlier Flash Eurobarometer reports conducted in 2015. In the final part, the report addresses the investment in various innovation activities companies have made since January 2013.

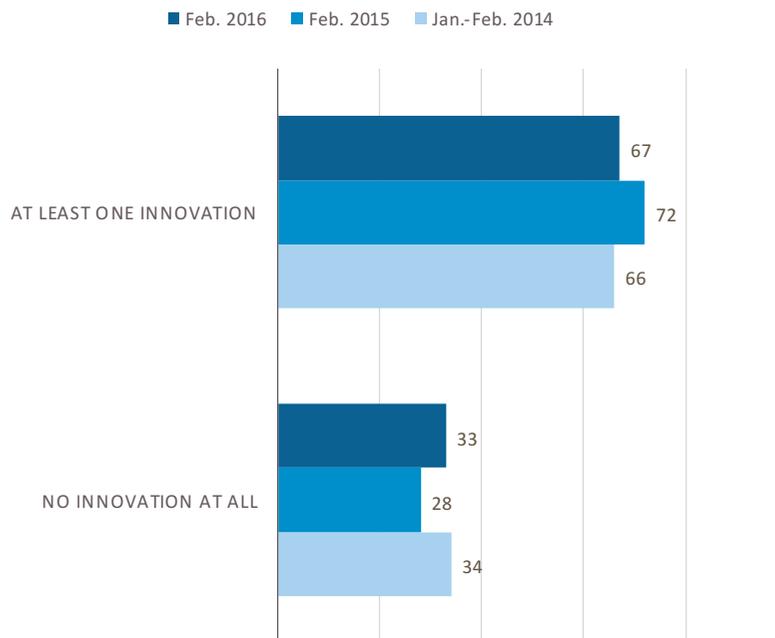
1 What types of innovations

The majority of companies have introduced at least one innovation since January 2013

Companies were asked whether their companies had introduced any type of innovation since January 2013⁵

More than two thirds of companies have introduced at least one innovation since January 2013 (67%) - a decrease of five percentage points since the last survey in February 2015, but slightly ahead of the results during the survey in 2014 (+1 pp).

Q2A Has your company introduced any of the following types of innovation since January 2013?
(% - EU)



Base: All companies (n =13,112, 100% of base)

⁴ This definition of ‘innovation’ was used in the questionnaire: “Innovation occurs when a company introduces a new or significantly improved good, service, process, marketing strategy or organisational method. The innovation can be developed by the company itself or has been originally developed by other companies or organisations”.

⁵ Q2. Has your company introduced any of the following types of innovation since January 2013> ANSWER New or significantly improved goods; New or significantly improved services; New or significantly improved processes (eg. Production processes or distribution methods); New or significantly improved marketing strategies (eg. Packaging, product promotion or placement, or pricing strategies); New or significantly improved organisational methods.

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Country analysis

Companies in the US, in comparison with EU companies are less likely to have introduced one innovation since January 2013 (56% vs. 67%), however since the last survey in 2015, they are more likely to have done this (+9 percentage points).

On the other hand, three quarters of companies in Switzerland (75%, +2 pp) have introduced at least one innovation since 2013, and they are more likely to have innovated than EU countries (75% vs. 67%).

Across the EU, the absolute majority of companies in each country have introduced at least one innovation since 2013, with the exception of Estonia where equal proportions of companies have and haven't introduced at least one type of innovation since 2013.

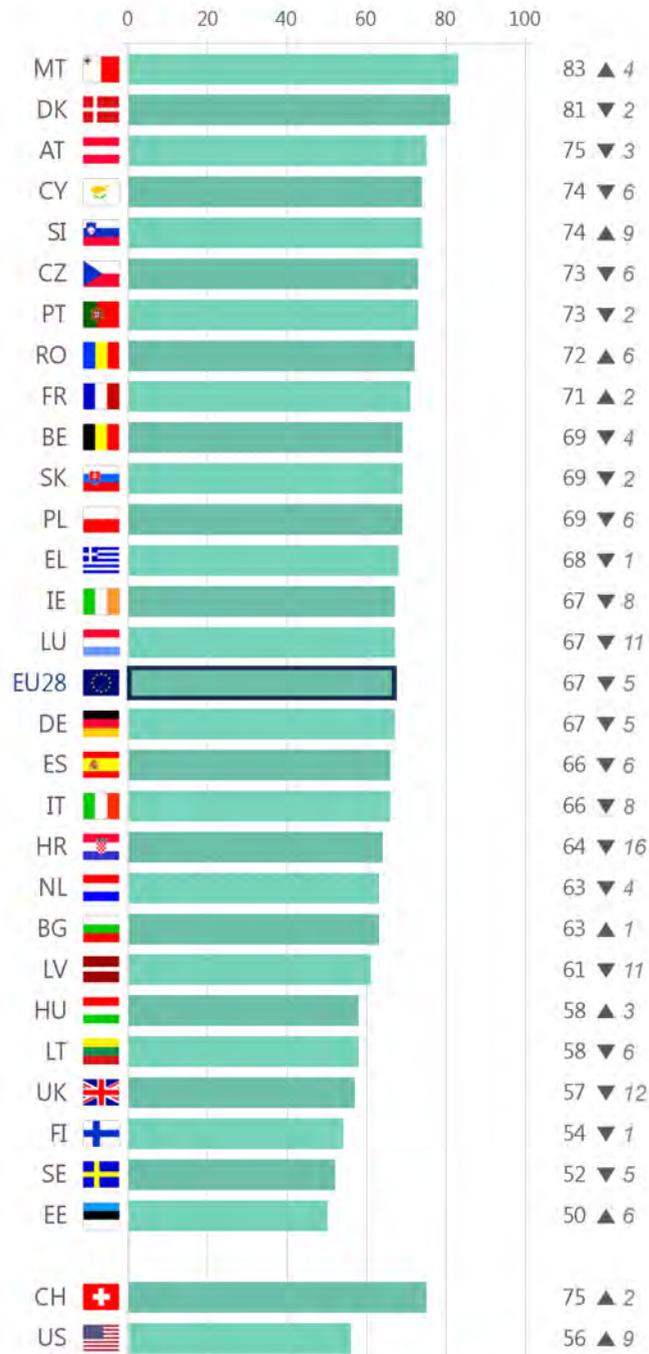
Companies in Malta (83%, +4), Denmark (81%, -2 pp) and Austria (75%, -3pp) are most likely to have introduced an innovation since early 2013, whilst companies in Estonia (50%, +6 pp), Sweden (52%, -5pp) and Finland (54%, -1pp) are least likely to.

Since the last survey, in 21 countries, there has been a decrease in the proportion of companies introducing at least one innovation. The largest can be seen in Croatia (-16 pp) followed by the United Kingdom (-12 pp), Latvia (-11 pp) and Luxembourg (-11 pp).

The largest increases can be seen amongst companies in Slovenia (+9 pp), Romania (+6 pp) and Estonia (+6 pp).

Q2A Has your company introduced any of the following types of innovation since January 2013?
 (% - AT LEAST ONE INNOVATION)

Feb. 2016 –
 Feb. 2015



Base: All companies (n = 13,112, 100% of base)

An analysis at **company characteristic level** reveals that:

- Larger companies are more likely than smaller companies to have introduced at least one innovation; 96% of companies with 250+ employees in comparison with 65% of companies with 1-9 employees.
- Retail (70%) and manufacturing (68%) companies are more likely to have implemented innovative practices than industry (61%) or services (65%).
- Companies that are part of a group (80%) are more likely than those that are not (65%) to have introduced at least one innovation.
- More than seven in ten companies with a turnover bigger than €2 million (73%) have introduced at least one innovation, in comparison with 57% of smaller companies with a turnover up to €100,000.
- Growing companies, with a turnover rising by more than 5% since 2013, are more likely to have introduced innovation compared with companies where turnover has fallen by 5% or more (75% vs. 60%).

Q2a Has your company introduced any of the following types of innovation since January 2013?
(% - EU)

	At least one innovation	No innovation at all
EU28	67	33
Company size		
1-9	65	35
10-49	74	26
50-249	84	16
250+	96	4
Sectors grouped (NACE)		
Manufacturing (C)	68	32
Retail (G)	70	30
Services (H/I/J/K/L/M/N/R)	65	35
Industry (D/E/F)	61	39
Part of a group		
Yes	80	20
No	65	35
Company's turnover in 2015		
Up to 100 000 euros	57	43
More than 100 000 to 500 000 euros	68	32
More than 500 000 to 2 mil. euros	73	27
More than 2 mil. euros	73	27
Company's turnover since 2013		
Risen by 5% or more	75	25
Remained approx. the same	64	36
Fallen by 5% or more	60	40

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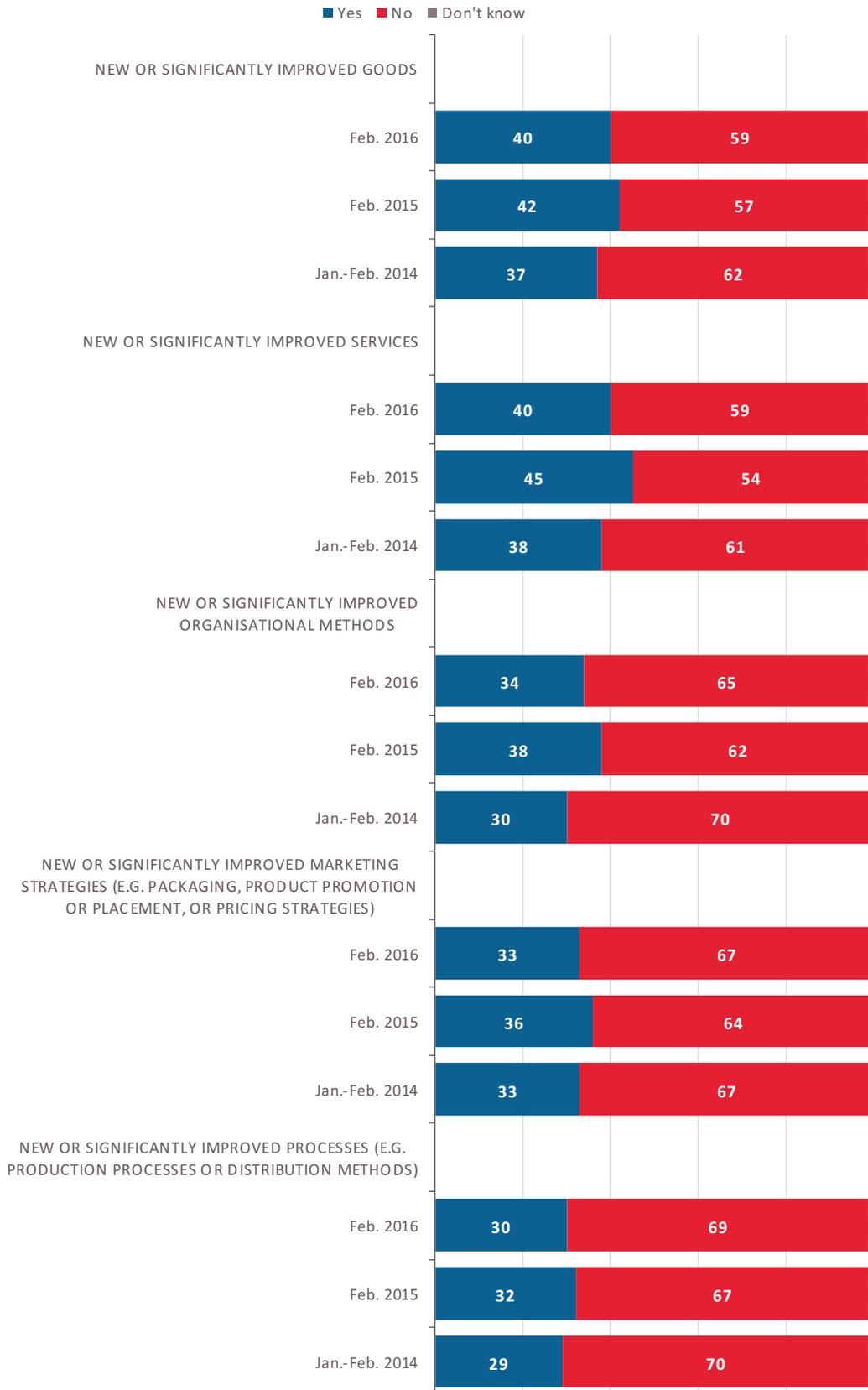
The proportion of companies introducing innovations has decreased across all areas

Four in ten companies have introduced new or significantly improved goods or services since January 2013 (both 40%). Around two thirds of all companies have implemented new or significantly improved organizational methods (34%) and marketing strategies (33%) whilst slightly less have introduced new or improved processes (30%).

Since the last survey in 2015, there has been a decrease in the proportion of companies introducing the various types of innovation into their businesses. Companies are less likely to have introduced new and significantly improved services (-5 percentage points), organizational methods (-4 pp), marketing strategies (-3 pp), goods (-2 pp) and processes (-2 pp).

However, compared with the earlier survey in 2014, results are equally or slightly larger by a range of four percentage points. The largest difference since 2014 is the proportion of companies introducing new or significantly improved organizational methods (+ 4 pp -; 34% in 2016 vs. 38% in 2015 vs. 30% in 2014).

Q2 Has your company introduced any of the following types of innovation since January 2013?
(% - EU)



Base: All companies (n =13,112, 100% of base)

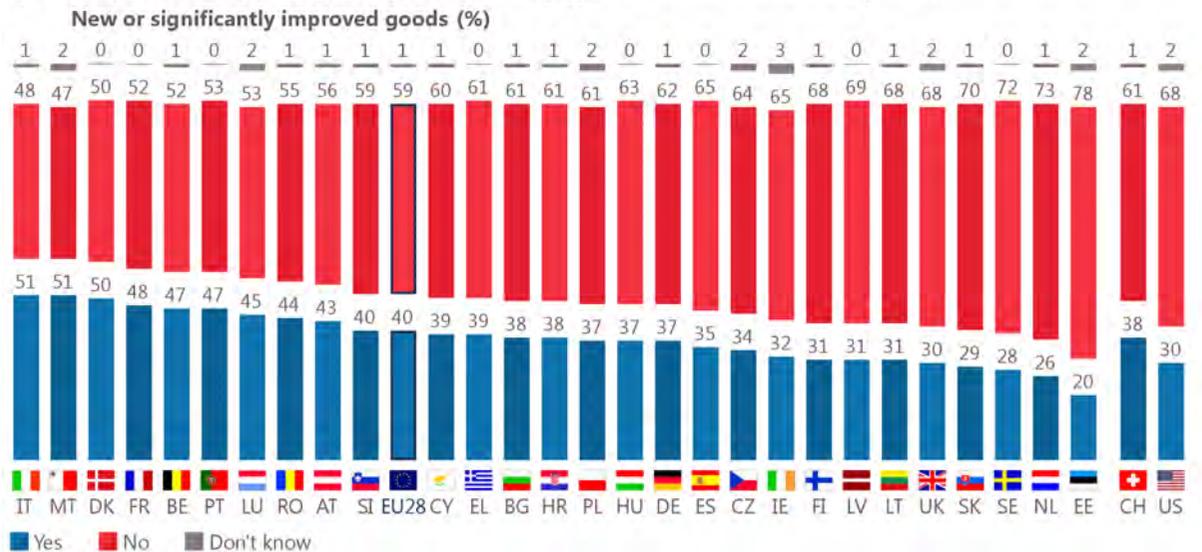
Country analysis

Four in ten countries in the EU have introduced at least one **new or significantly improved good** (40%) since January 2013.

Companies in the US are less likely to have introduced new or significantly improved goods since January 2013, when compared to those in the EU (30% vs. 40%), whilst companies in Switzerland are only slightly less likely than their counterparts in the EU (38% vs. 40%).

In 25 out of 28 EU Member States, the absolute majority of companies have not introduced new or significantly improved goods since early 2013. Countries with the highest proportions of companies that have introduced new or significantly improved goods include Italy (51%), Malta (51%) and Denmark (50%). Companies in Estonia (20%), the Netherlands (26%) and Sweden (28%) are the least likely to have done this since 2013.

Q2.1 Has your company introduced any of the following types of innovation since January 2013?



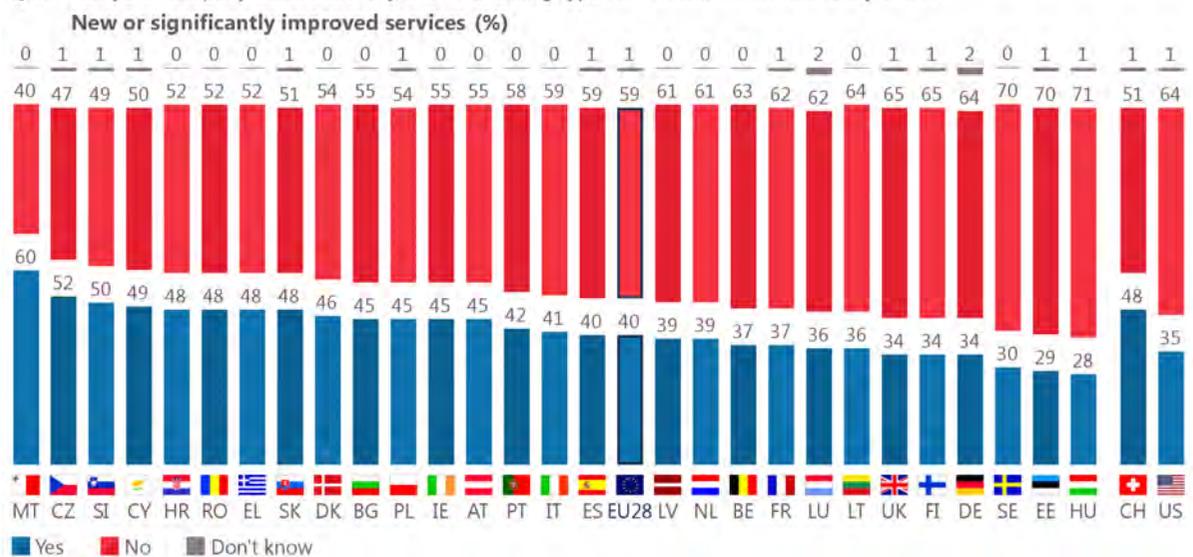
Base: All companies (n = 13,112, 100% of base)

More than four in ten companies in the European Union have introduced a **new or significantly improved service** (40%) since January 2013.

Companies in the US are less likely to have introduced new or significantly improved services in comparison with the EU Member States (35% vs. 40%). In contrast, almost half of companies in Switzerland (48%) have introduced an innovative service this since 2013, and are more likely to have done compared with their EU counterparts (48% vs. 40%).

The majority of companies in Malta (60%), the Czech Republic (52%) and Slovenia (50%) are most likely to have introduced new or significantly improved services since January 2013. This contrasts with companies in Hungary (28%), Estonia (29%) and Sweden (30%) that are least likely to have introduced new or significantly improved services since January 2013.

Q2.2 Has your company introduced any of the following types of innovation since January 2013?



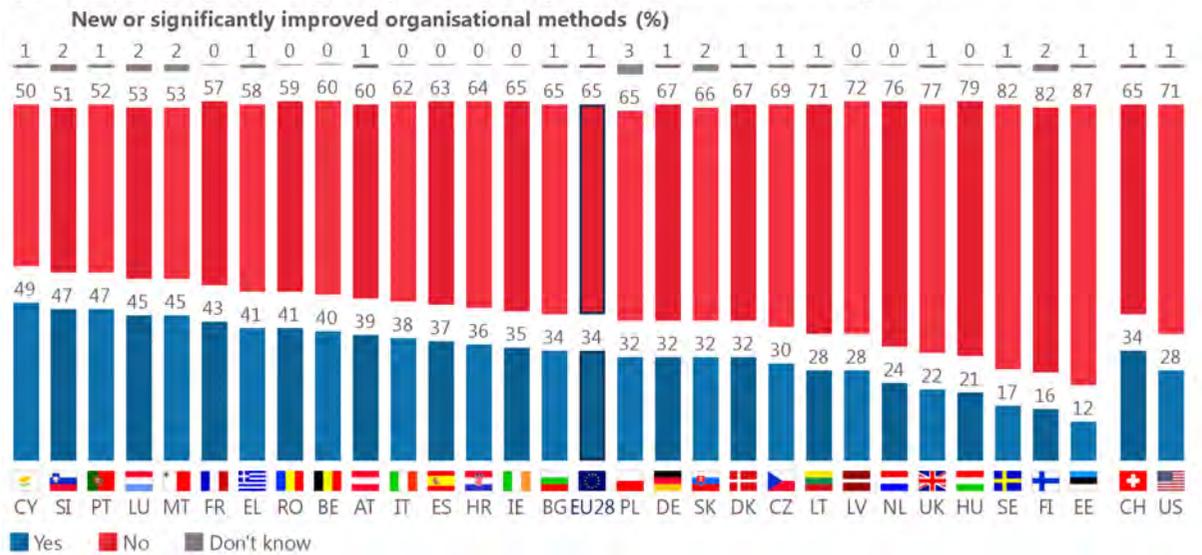
Base: All companies (n = 13,112, 100% of base)

More than two thirds of EU countries have introduced **new or significantly improved organizational methods** (34%) since January 2013.

More than a quarter of companies in the US (28%) have introduced new or significantly improved organizational methods since January 2013, however they are less likely than countries in the EU to have done this (28% vs. 34%). Equal with their EU counterparts, more than two thirds of companies in Switzerland (34%) have introduced new and significantly improved organizational methods.

Companies in Cyprus (49%), Slovenia (47%) and Portugal (47%) are most likely to have introduced new or significantly improved organization methods, in comparison with low proportions of companies in Estonia (12%), Finland (16%) and Sweden (17%) that are least likely.

Q2.5 Has your company introduced any of the following types of innovation since January 2013?



Base: All companies (n =13,112, 100% of base)

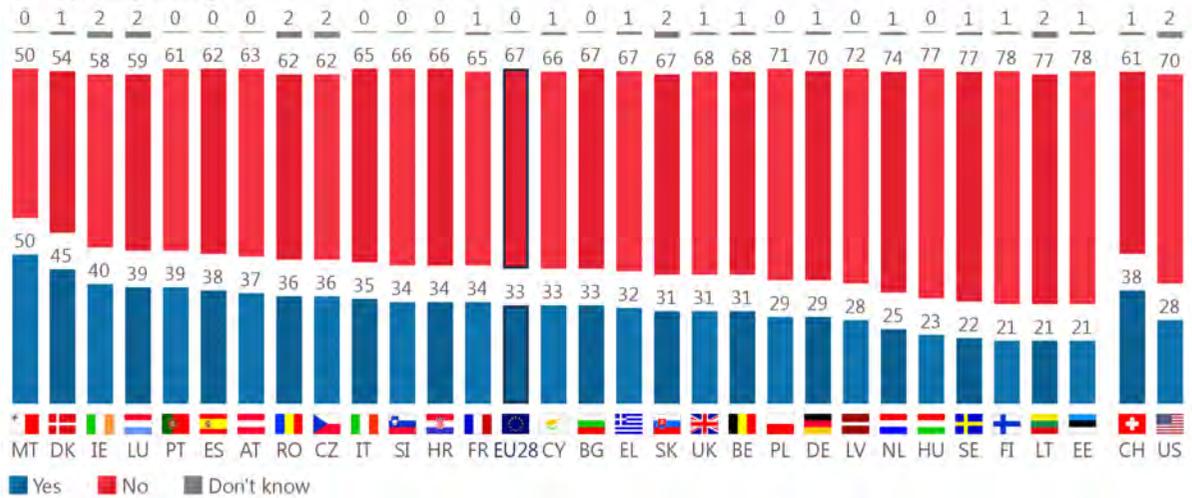
One third of companies in the EU have introduced a **new or significantly improved marketing strategy** (33%).

In comparison with the EU, companies in the US are less likely to have introduced new or significantly improved marketing strategies (33% vs. 28%), whereas companies in Switzerland (38%) are more likely to have done this compared with their EU counterparts.

With the exception of Malta (50%), the majority of companies in all EU countries have not introduced a new or significantly improved market strategy. Companies in Malta (50%), Denmark (45%) and Ireland (40%) are most likely to have introduced new or significantly improved marketing strategies, while companies in Estonia, Finland, along with Lithuania (all 21%) have the lowest proportion of companies that have done this.

Q2.4 Has your company introduced any of the following types of innovation since January 2013?

New or significantly improved marketing strategies (e.g. packaging, product promotion or placement, or pricing strategies) (%)



Base: All companies (n = 13,112, 100% of base)

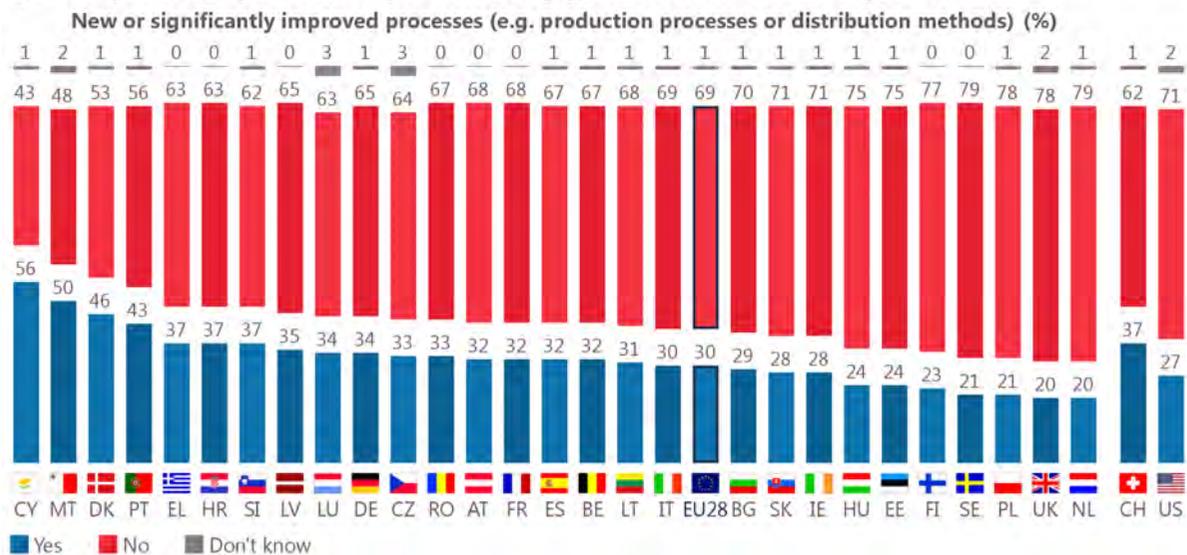
Three in ten companies in the EU have introduced **new or significantly improved processes** (30%) since January 2013.

More than a quarter of companies in the US (27%) have introduced new or significantly improved processes, which is slightly less likely than EU companies (27% vs. 30%).

On the other hand, companies in Switzerland (37%) are more likely than EU companies (30%), to have introduced new or significantly improved processes since January 2013.

With the exception of companies in Cyprus (56%) and Malta (50%), the majority of companies in the EU have not introduced a new or significantly improved process. Companies in Cyprus (56%), Malta (50%) and Denmark (46%) are most likely to have introduced new or significantly improved processes in comparison with companies in the Netherlands (20%) and the United Kingdom (20%) that are least likely to have.

Q2.3 Has your company introduced any of the following types of innovation since January 2013?



Base: All companies (n =13,112, 100% of base)

Evolutions since 2015

Overall, since the last survey in February 2015, companies in the EU are slightly less likely to have introduced any of the types of innovation mentioned in the survey. EU companies are slightly less likely to have introduced new or significantly improved goods (-2 percentage points), processes (-2 pp) and marketing strategies (-3 pp), organisational methods (-4 pp) and less likely to have introduced new or significantly improved services (-5 pp).

By comparison, US companies are more likely to have introduced each of the innovation types, since the last survey in 2015. The largest increase can be seen in the proportion of US companies that have introduced new or significantly improved processes (+10 pp). US companies are also more likely to have introduced new or significantly improved goods (+7 pp) than in 2015, as well as services (+3 pp), organisational methods (+2 pp) and marketing strategies (+2 pp).

The trends in Switzerland are more varied since the last survey. Companies in Switzerland are more likely to have introduced new or significantly improved marketing strategies (+10 pp) and new or significantly improved services (+6 pp). However, companies are less likely to have introduced new or significantly improved organisational methods (-7 pp), processes (-6 pp) and new or significantly improved goods (-5 pp).

Across the EU Member States, the largest increases in companies that are more likely to have introduced **new or significantly improved goods**, can be seen in Slovenia (+12 pp), Bulgaria (+6 pp) and Hungary (+6 pp), whilst companies in Ireland (-12 pp), the United Kingdom (-9 pp) and Greece (-9 pp) are less likely to have done this since the last survey in 2015.

Companies in Luxembourg are now much less likely to say they have introduced **new or significantly improved services** since the last survey (-19 pp), followed by those in the United Kingdom (-14 pp), Croatia (-12 pp) and Portugal (-12 pp). Slovenia is more likely to have introduced new or significantly improved services since the last survey (+14 pp) followed by Malta (+9 pp) and Estonia (+9 pp).

Since the last survey, companies in Slovenia are significantly more likely to say they have introduced **new or significantly improved organisational methods** (+16 pp) followed by those in Malta and France (both +5pp). This compares to companies in the United Kingdom (-14 pp) and Croatia (-12 pp) that are less likely to say they have made any new improvements to their organisational methods.

The largest increases in the introduction of **new or significantly improved marketing strategies** are observed amongst companies in Bulgaria (+7 pp) and Spain (+6 pp). In contrast, companies in Croatia (-8 pp), Italy (-7 pp) and Portugal (-7 pp) are less likely to say they have made improvements in this area, than they were during the last survey.

Compared with results in 2015, companies in Slovenia (+9 pp), Malta (+7 pp) and Hungary (+7 pp) are more likely to have introduced **new or significantly improved processes**. Conversely, companies in Croatia (-14 pp), Poland (-10 pp) and the Netherlands (-9 pp) are less likely to have done this.

Q2 Has your company introduced any of the following types of innovation since January 2013?
(% - YES)

		New or significantly improved goods	2016 - 2015	New or significantly improved services	2016 - 2015	New or significantly improved organisational methods	2016 - 2015	New or significantly improved marketing strategies (e.g. packaging, product promotion or placement, or pricing strategies)	2016 - 2015	New or significantly improved processes (e.g. production processes or distribution methods)	2016 - 2015
EU28		40	▼ 2	40	▼ 5	34	▼ 4	33	▼ 3	30	▼ 2
BE		47	▲ 4	37	=	40	▼ 9	31	▼ 5	32	▼ 4
BG		38	▲ 6	45	▲ 7	34	▼ 8	33	▲ 7	29	▲ 4
CZ		34	▼ 1	52	▼ 2	30	▼ 8	36	▼ 1	33	▼ 4
DK		50	▼ 4	46	▼ 6	32	▼ 6	45	▲ 1	46	=
DE		37	▼ 5	34	▼ 6	32	▲ 3	29	▼ 2	34	▲ 6
EE		20	▲ 5	29	▲ 9	12	▼ 7	21	▲ 5	24	=
IE		32	▼ 12	45	▼ 4	35	▼ 7	40	▼ 6	28	▼ 5
EL		39	▼ 9	48	▲ 3	41	▼ 2	32	=	37	▲ 2
ES		35	=	40	▼ 5	37	▼ 5	38	▲ 6	32	▲ 2
FR		48	▲ 5	37	▼ 4	43	▲ 5	34	▼ 1	32	▲ 6
HR		38	▼ 8	48	▼ 12	36	▼ 12	34	▼ 8	37	▼ 14
IT		51	▼ 1	41	▼ 4	38	▼ 6	35	▼ 7	30	▼ 6
CY		39	▲ 2	49	▼ 2	49	▼ 1	33	▼ 6	56	▲ 5
LV		31	▼ 6	39	▲ 1	28	▼ 9	28	▲ 2	35	▼ 1
LT		31	=	36	▼ 2	28	▼ 2	21	▼ 1	31	▲ 5
LU		45	▼ 7	36	▼ 19	45	▼ 3	39	▼ 1	34	▼ 2
HU		37	▲ 6	28	▼ 1	21	▲ 4	23	▲ 4	24	▲ 7
MT		51	▲ 3	60	▲ 9	45	▲ 5	50	▼ 1	50	▲ 7
NL		26	▼ 3	39	▼ 4	24	▼ 4	25	▼ 6	20	▼ 9
AT		43	▲ 2	45	▼ 3	39	=	37	=	32	▲ 1
PL		37	▼ 3	45	▼ 9	32	▼ 4	29	▼ 5	21	▼ 10
PT		47	▼ 6	42	▼ 12	47	▼ 8	39	▼ 7	43	▼ 2
RO		44	▲ 4	48	▲ 4	41	▲ 1	36	▼ 6	33	▲ 3
SI		40	▲ 12	50	▲ 14	47	▲ 16	34	▲ 4	37	▲ 9
SK		29	▼ 7	48	▼ 1	32	▲ 1	31	▲ 3	28	▼ 1
FI		31	▼ 2	34	▼ 2	16	▼ 5	21	▼ 2	23	▼ 1
SE		28	▲ 1	30	▼ 3	17	▼ 4	22	▼ 3	21	=
UK		30	▼ 9	34	▼ 14	22	▼ 14	31	▼ 6	20	▼ 8
CH		38	▼ 5	48	▲ 6	34	▼ 7	38	▲ 10	37	▼ 6
US		30	▲ 7	35	▲ 3	28	▲ 2	28	▲ 2	27	▲ 10

Base: All companies (n =13,112, 100% of base)

An analysis of company characteristics shows:

- The **larger the company**, the more likely it is to have introduced new or significantly improved goods or services. For example 76% of large companies with 250+ employees are likely to have introduced new goods or services in comparison with 55% of small companies with 1-9 employees.
- Companies in the **manufacturing sector** (60%) are more likely than industry (49%) to have introduced new or significantly improved goods or services.
- **Older companies**, (established before 2010) are less likely to have introduced new or significantly improved goods or services than companies established between 2010 and 2015 (54% vs. 65%).
- **Medium and larger sized turnover** companies are more likely to have introduced these innovations, than smaller companies. For example 48% of companies with turnover less than €100,000 say they have introduced innovations in goods or services, compared with 63% of companies with turnover larger than €2 million.
- **Growing businesses** in terms of turnover (risen by 5% or more) are more likely to have introduced new or significantly improved goods or services than declining turnover (fallen by 5% or more) (65% vs. 50%).
- Companies that **use design as a central element** in their strategy are more likely than those that do not, to have introduced new or significantly improved goods or services (73% vs. 42%).

Q2b Has your company introduced any of the following types of innovation since January 2013?

	Goods or services innovators	Other innovators	Non-innovators
EU28	56	11	33
Company size			
1-9	55	10	35
10-49	62	12	26
50-249	70	14	16
250+	76	20	4
Sectors grouped (NACE)			
Manufacturing (C)	60	8	32
Retail (G)	59	11	30
Services (H/I/J/K/L/M/N/R)	55	10	35
Industry (D/E/F)	49	12	39
Company age			
Before 2010	54	11	35
Between 2010 and 2015	65	10	25
After 2015	55	5	40
Company's turnover in 2015			
Up to 100 000 euros	48	9	43
More than 100 000 to 500 000 euros	56	11	33
More than 500 000 to 2 mil. euros	61	11	28
More than 2 mil. euros	63	10	27
Company's turnover since 2013			
Risen by 5% or more	65	10	25
Remained approx. the same	53	11	36
Fallen by 5% or more	50	10	40
Company's approach to design			
Central element	73	9	18
Integral but not central	73	10	17
Used as last finish	64	15	21
Not systematically used	52	12	36
Not used	42	8	50

2 How much innovations represent in the company’s turnover

For the majority of companies that have introduced an innovative good or service since January 2013, the innovative goods or service represents up to a quarter of their turnover.

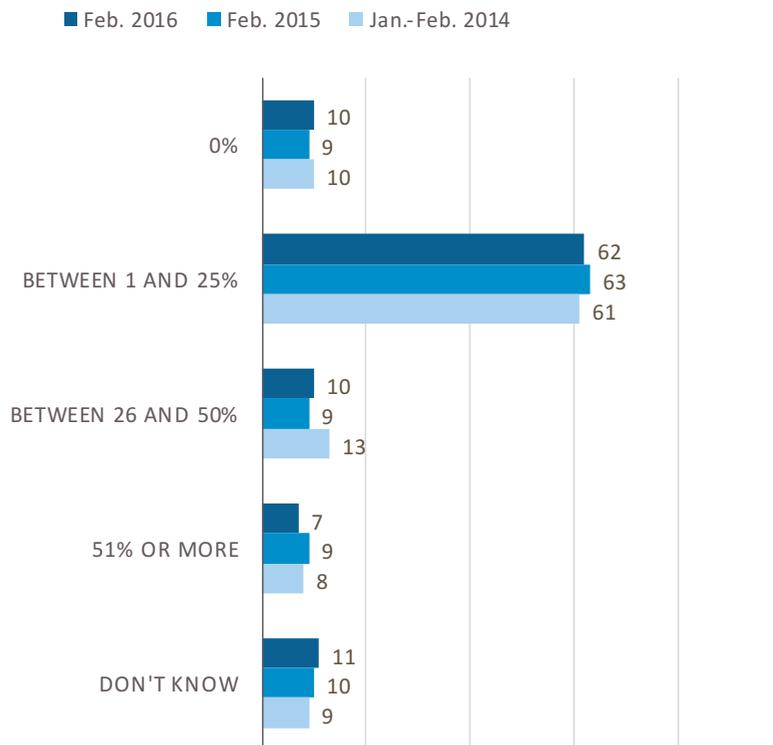
Companies that have introduced an innovative good or service since January 2013, were asked to estimate the share of their innovative goods or services of the company’s turnover in 2015,⁶

For around two thirds of these companies (62%) innovative goods or services represented between 1 and 25% of their turnover. One in ten say these goods or services accounted for between 26 and 50% of turnover, whilst 7% consider their innovative goods or services to represent more than half of their turnover.

Slightly more than one in ten (11%) don’t know and a further 10% of companies estimate their innovative goods or services did not account for any turnover in 2015.

Results overall are stable compared to previous surveys in 2015 and 2014.

Q3 Approximately what percentage of your company's turnover in 2015 was due to innovative goods or services that have been introduced since January 2013? (% - EU)



Base: Companies that have introduced innovative goods or services since January 2013 (n =7329, 56% of base)

⁶ Q3. Approximately what percentage of your company's turnover in 2015 was due to innovative goods or services that have been introduced since January 2013. ANSWER 0%; Between 1 and 25%; Between 26 and 50%; 51% or more; Don't know.

Country analysis

More than six in ten US companies (61%) that have introduced an innovative goods or service since 2013, say their innovative goods or service represent between 1 and 25% of their 2015 turnover. This proportion is slightly less than that of EU companies (61% vs. 62%). However, companies in the US, are more likely than those in the EU, to say their innovative goods or services accounted for more than 51% of their turnover (16% vs. 7%). Compared to EU companies, US businesses are less likely to say they don't know (11% vs. 5%) but more likely to state that innovative goods or services do not account for any proportion of their turnover (14% vs 10%).

Companies in Switzerland are more likely to say these goods or services represented up to a quarter of their turnover in 2015, compared to the EU average (71% vs. 62%) and slightly more likely to say they accounted for 51% or more of turnover (9% vs. 7%). Conversely, a slightly higher proportion of EU companies, compared to companies in Switzerland, say their innovative goods or services contributed between 26% and 50% of turnover (10% vs. 7%), or did not account for any proportion of their turnover (10% vs 4%).

In all Member States, the majority of companies with the exception of Lithuania (49%), are more likely to say their innovations represent **between 1 and 25% in their 2015 turnover (EU average 62%)**. Companies in Croatia (74%), Spain (72%), France (70%) and Ireland (70%) are the most likely to say this compared with Lithuania (49%) and Denmark (52%) who are least likely to say this.

Companies in Lithuania (22%) and the Czech Republic (19%) are more likely to say their innovations accounted for **between 26 and 50% of turnover (EU average 10%)**, in comparison with smaller proportions of companies in the Netherlands (3%) and Italy (4%).

More than one in five companies in the Republic of Cyprus (21%) that have introduced innovation, say their innovative goods or services represented more than **51% of turnover (EU average 7%)**. Out of the 28 EU countries, companies in 20 countries have proportions of 10% or less, with the lowest proportions amongst companies in Italy, Portugal and Slovenia (all 4%).

In nine EU countries, more than one in ten companies say their innovative goods or services did not account for **any proportion of their turnover (EU average 10%)**; Estonia (15%), Slovenia (14%) and Italy (13%) have the highest proportions compared with companies in Malta (4%), Spain and Austria (both 7%)

Almost one fifth of companies in Italy (19%) that have introduced innovative goods or services responded with **“don't know” (EU average 11%)**. Slightly less at 17%, companies in Estonia, Portugal and Malta also don't know what percentage of their turnover the innovative goods or services represented.

Evolutions since 2015

Overall, across the EU there has been very little change amongst companies that have introduced innovative goods or services since the last survey in 2015 (ranging from -2% to +1%).

However, there has been more notable changes at a country level, and in particular for companies in the US.

Companies in the **US** that have introduced innovative goods or services, are now more likely to say these innovations account for 1-25% of their 2015 turnover (61%, +8 percentage points) and less likely to say these goods accounted for 26-50% of turnover (4%, -9 pp). Additionally, there is an increase in the proportion of companies in the US that claim these new good or services accounted for more than 51% of turnover (16%, +6 pp).

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In **Switzerland**, there has been an increase in the number of companies that say their innovative goods or services accounted for 51% of turnover (9%, +7 pp) but very little change since the last survey for other turnover categories.

Companies in **Lithuania**, are less likely to say their innovative goods or services account for between 1% and 25% of turnover since the last survey in 2015 (49%, -21 pp). They are now more likely to say that these new goods or services are more likely to be accounted for between 26% and 50% of their turnover (22%, +14 pp) or for more than 51% of turnover (11%, +6 pp).

In **Malta**, companies are less likely to say these innovative goods or services accounted for between 1 and 25% (58%, -14 pp). Instead, they are more likely to say they are worth 26-50% of turnover (14%, +7 pp) or they don't know (17%, +9 pp).

The countries with the **largest increases** in the proportions of companies that say their innovative goods or services represented between 1 and 25% of turnover, include Poland (43%, +9 pp), Croatia (74%, +8 pp) and Finland (60%, +7 pp).

Businesses in **Cyprus** are less likely to say the innovative goods or services represent 0% of their 2015 turnover (9%, -11 pp) whilst there has been an increase in the proportion of businesses that say these goods represented 51% or more of their turnover (21%, +14 pp).

Since 2015, there has also been an increase in the proportion of businesses in **Slovakia** (14%, +7 pp) that are more likely, to think their innovative goods or services their companies have introduced accounted for 51% or more of turnover.

Q3 Approximately what percentage of your company's turnover in 2015 was due to innovative goods or services that have been introduced since January 2013? (%)

		0%	2016 - 2015	Between 1 and 25%	2016 - 2015	Between 26 and 50%	2016 - 2015	51% or more	2016 - 2015	Don't know
EU28		10	▲ 1	62	▼ 1	10	▲ 1	7	▼ 2	11
BE		8	▲ 3	64	▼ 10	11	▲ 1	5	▲ 1	12
BG		8	▼ 7	65	▲ 5	9	▲ 4	8	▼ 2	10
CZ		9	▲ 1	58	▼ 8	19	▲ 6	8	▲ 1	6
DK		11	▲ 2	52	▲ 3	15	▲ 1	11	▼ 2	11
DE		9	▲ 2	64	▼ 1	10	▲ 2	9	▲ 2	8
EE		15	▲ 4	56	▲ 4	5	▼ 5	7	▼ 2	17
IE		11	▲ 3	70	▲ 1	8	▼ 4	7	=	4
EL		11	▼ 1	64	▲ 5	11	▼ 3	11	▼ 1	3
ES		7	▼ 1	72	▲ 5	7	▼ 1	5	▼ 1	9
FR		9	▲ 1	70	=	10	▲ 2	5	▼ 4	6
HR		10	▼ 5	74	▲ 8	5	▼ 3	5	▲ 1	6
IT		13	▲ 2	60	▼ 8	4	▼ 5	4	▼ 2	19
CY		9	▼ 11	55	▲ 4	8	▲ 1	21	▲ 14	7
LV		10	▲ 3	67	▲ 1	8	▼ 2	8	▼ 2	7
LT		9	▲ 2	49	▼ 21	22	▲ 14	11	▲ 6	9
LU		8	▲ 3	62	▼ 9	11	▲ 3	10	=	9
HU		12	▲ 1	69	▼ 1	10	▲ 1	7	▲ 1	2
MT		4	▼ 4	58	▼ 14	14	▲ 7	7	▲ 2	17
NL		11	▲ 2	65	▲ 1	3	▼ 10	11	▲ 2	10
AT		7	▲ 6	58	▲ 1	10	▲ 1	9	▼ 2	16
PL		9	=	63	▲ 9	13	▲ 1	7	▼ 6	8
PT		12	▲ 2	58	▼ 5	9	▲ 2	4	▼ 3	17
RO		10	▲ 5	65	▼ 5	14	=	6	=	5
SI		14	▼ 4	63	▼ 1	10	▼ 1	4	▲ 1	9
SK		10	▲ 2	54	▼ 5	12	▼ 4	14	▲ 7	10
FI		8	▲ 1	60	▲ 7	9	▼ 3	16	▼ 5	7
SE		10	▼ 2	56	▲ 3	15	▼ 3	11	▼ 2	8
UK		9	▼ 1	55	▼ 2	12	▲ 7	10	▼ 1	14
CH		4	▼ 2	71	▼ 1	7	▼ 1	9	▲ 7	9
US		14	▼ 3	61	▲ 8	4	▼ 9	16	▲ 6	5

Base: Those companies that have introduced innovative goods or services since January 2013 (n = 7329, 56% of base)

A review of **company characteristics** reveals:

- **Larger companies** with 250+ employees are more likely to say their innovations represent between 1 and 25% of turnover (67%) than companies with fewer than 250 employees (between 59% and 63%).
- **Manufacturing** (69%) and **retail** (68%) **companies** are more likely than businesses from **services** (57%) or businesses from **industry** (63%) to say their goods or services innovations represent between 1 and 25% of turnover.
- Businesses in the **services sector** are more likely to say the goods or service innovations they have introduced, account for 26% or more of turnover (21%) vs. **manufacturing** (12%), **retail** (14%) and **industry** (16%).
- **Growing turnover companies** (those for which turnover has risen 5% or more since 2013) are more likely to say 26% or more of their revenue is attributable to innovative activities than companies that have steady or falling turnover (22% vs. 14 and 11%).
- **Companies that invest in innovation** are more likely to have higher proportions of turnover associated with innovation. For example, of the companies that invest more than 11% of their turnover into innovative activities, are more likely to say the revenue from innovative goods or services is 26% or more of their turnover (42%) than companies that invest less than 5% in innovation (between 12-15%).

Q3 Approximately what percentage of your company's turnover in 2015 was due to innovative goods or services that have been introduced since January 2013?
(% - EU)

	Between 1 and 25%	26% or more
EU28	62	17
Company size		
1-9	63	16
10-49	63	20
50-249	59	15
250+	67	14
Sectors grouped (NACE)		
Manufacturing (C)	69	12
Retail (G)	68	14
Services (H/I/J/K/L/M/N/R)	57	21
Industry (D/E/F)	63	16
Company's turnover since 2013		
Risen by 5% or more	66	22
Remained approx. the same	65	14
Fallen by 5% or more	65	11
% of company's turnover in 2015 invested in innovation activities		
0%	56	12
Less than 1%	68	12
Between 1 and 5%	73	15
Between 6 and 10%	66	22
11% or more	42	42

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3 Investment activities

The majority of businesses have continued to invest a proportion of their turnover into the acquisition of machines, equipment, software or licenses.

Companies were asked to estimate the proportion of revenue, their company has invested in a number of different activities⁷.

More than two thirds of companies (68%) have invested some turnover in the acquisition of machines, equipment, software or licenses.

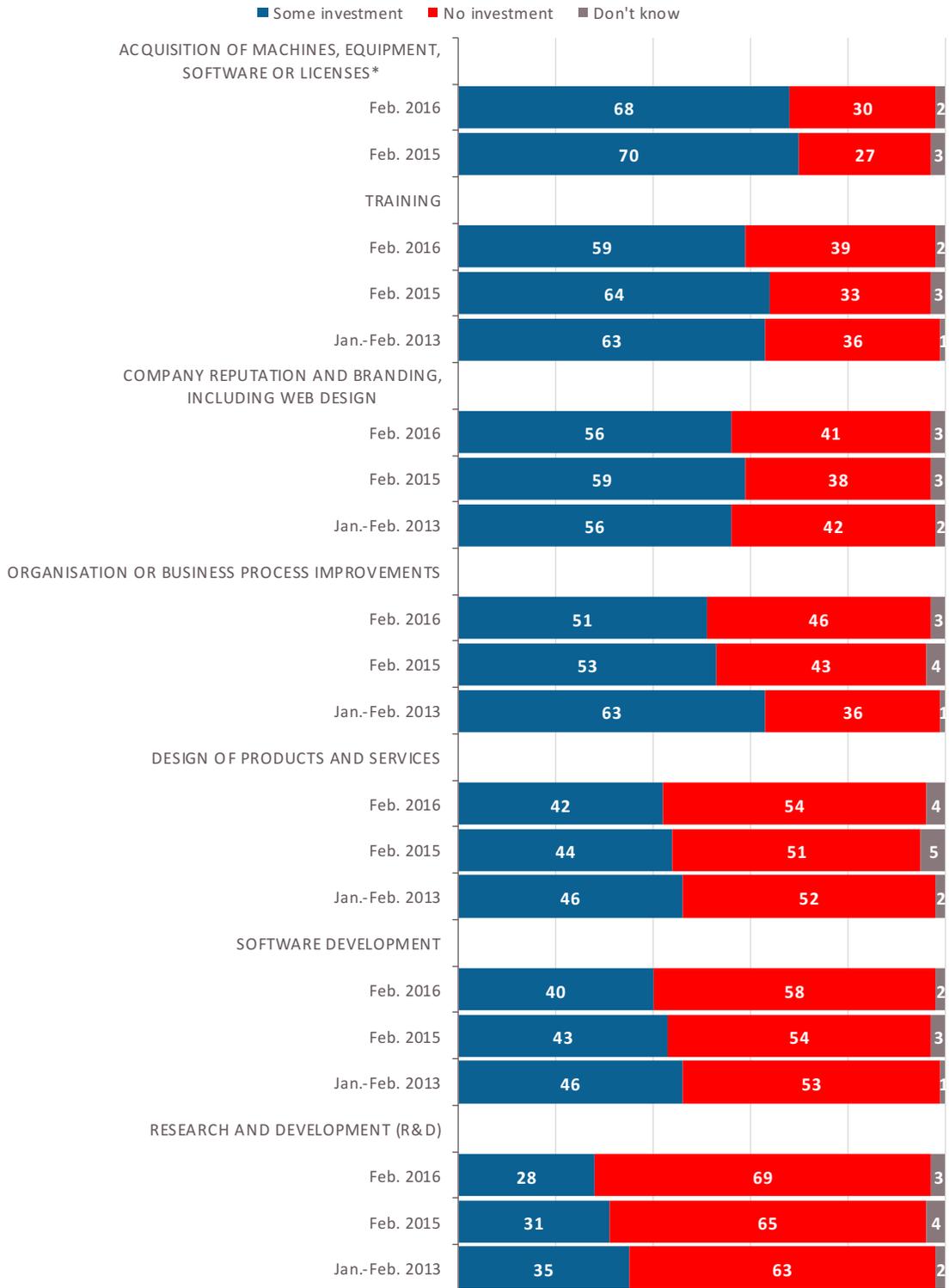
More than half of the businesses have invested some turnover into training (59%), company reputation and branding (56%) and organization or business process improvements (51%).

Less than half of companies say they have invested some of their turnover into design of products and services (42%) or software development (40%).

The proportion of companies investing some turnover in research and development relating to the total turnover has been in decline since 2013 (35% in 2013, vs. 31% in 2015, vs. 28% in 2016).

⁷ Q4B Since January 2013, what percentage of its total turnover has your company invested in each of the following activities? ANSWER: Acquisition of machines, equipment, software or licences; Training; Company reputation and branding including web design; Organisation or business process improvements; Design of products and services; Software development; Research and development (R&D).

Q4B Since January 2013, what percentage of its total turnover has your company invested in each of the following activities? (% - EU)



Base: All companies (n =13,112, 100% of base)

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Evolutions since 2015 and 2013

Since the last survey in 2015, EU companies are less likely to have made **some investment** in all of the innovation-related activities.

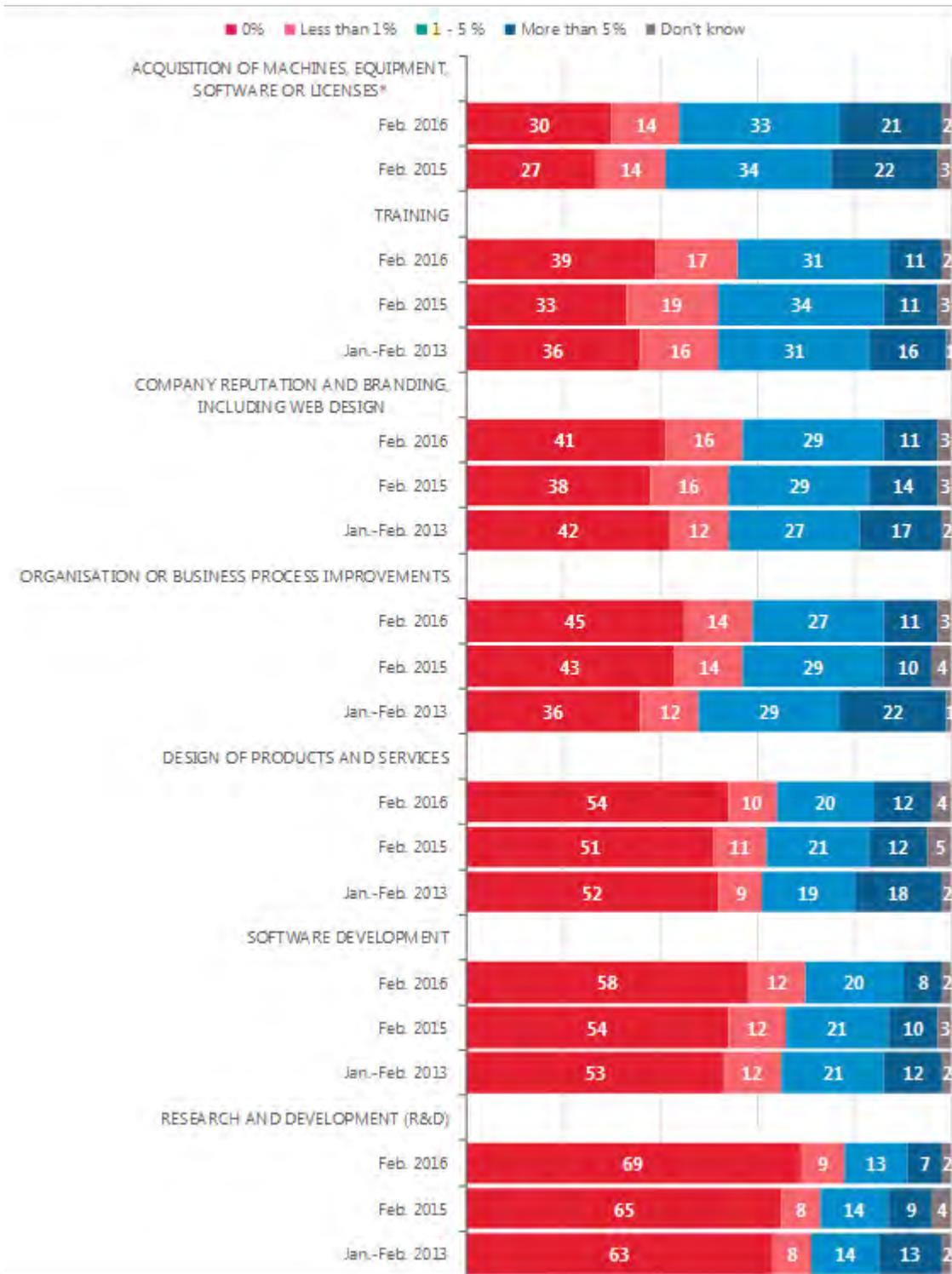
The activity with the largest decline in proportions since **2015** is **training** where companies were less likely to make some investment by five percentage points. Compared to the surveys conducted in 2015 and 2014, companies are also less likely to invest in **reputation and branding** (-3 pp).

Companies are also less likely to make some investment in **software development** (-3 pp), **research and development** (-3 pp) and slightly less likely to make some investment in **design of products and services** (-2 pp), **organization or business process improvements** (-2 pp) and **acquisition of machines, equipment, software or licenses** (-2 pp).

In comparison with the survey results from **2013**, there have been even larger declines in the proportion companies make some investment in these activities. In 2016, companies are much less likely to be investing in **organization or business improvements** (-12 pp), **research and development** (-7 pp), **software development** (-6 pp), **training** (-4 pp) and **design of products and services** (-4 pp)⁸.

⁸ There are no results from 2013 for acquisition of machines, equipment software or licenses.

Q4 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities? (% - EU)



Base: All companies (n = 13,112, 100% of base)

Country analysis

Overall **US** companies tend to be slightly behind the EU average for all investment activities with the exception of research and development. In this aspect US businesses are more likely than those in the EU to make some investment (33% vs. 28%). Organisation or business process improvements is an exception where the proportion of companies in US and the EU (51%) making some investment in this area are the same.

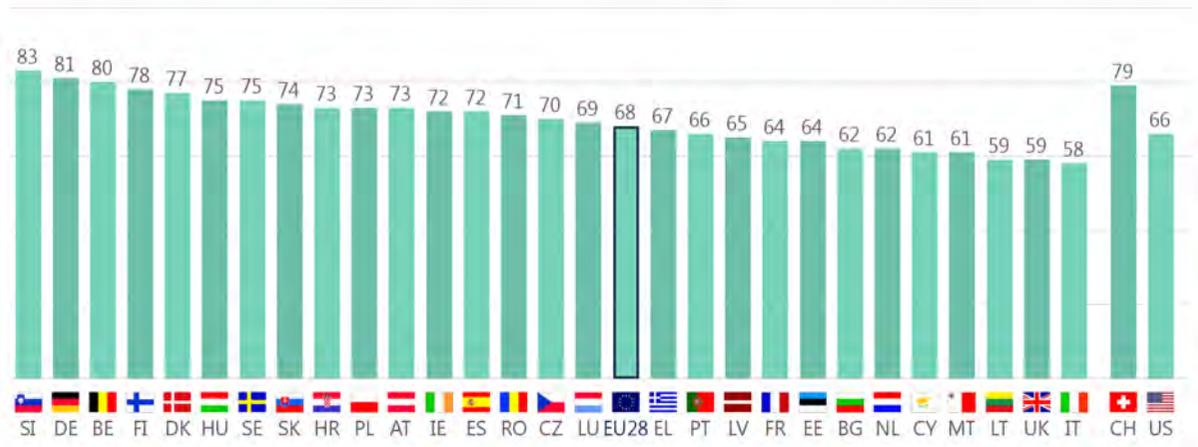
Companies in **Switzerland** are more likely than those in the EU to have invested some of their turnover. Software development is the exception where the proportion of companies in EU making some investment in this area are the same as those observed in Switzerland (40%).

Two thirds of US companies have made some investment towards the **acquisition of machines, equipment, software or licences**, which is slightly less than the EU average 66% vs. 68%) whereas almost four in ten companies in Switzerland have made investments in this area, which is much more than their EU counterparts (79% vs. 68%).

For the EU countries, the results show 68% all companies make some investment into the **acquisition of machines, equipment, software or licences**. In fact, the absolute majority of companies in all countries have invested some of their turnover into this area. More than four in five companies in Slovenia (83%) and Germany (81%) and Belgium (80%) have invested some of their turnover, whilst those in Italy (58%) and the United Kingdom (59%) are least likely to have invested in this activity.

Q4B.7 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Acquisition of machines, equipment, software or licenses (% - SOME INVESTMENT)



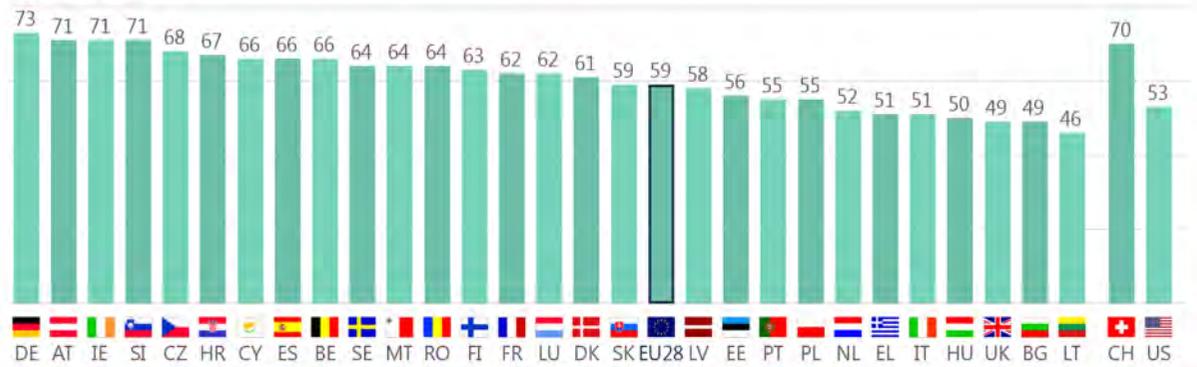
Base: All companies (n =13,112, 100% of base)

More than half of US companies have invested in **training** (53%) since January 2013 and are less likely than companies in the EU to have done so (59%).

Companies in Switzerland on the other hand are more likely than the EU to have invested in training, with more than 70% saying they have made some investment in this area compared to% of EU companies.

Amongst the EU countries, in all but three countries, the majority of companies have invested in **training** since January 2013. More than seven out of ten companies in Germany (73%), Austria (71%), Ireland (71%) and Slovenia (71%) have invested a proportion of turnover into training since 2013, whilst businesses in Lithuania (46%), Bulgaria and the United Kingdom (both 49%) are less likely to do so.

Q4B.1 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?
Training (% - SOME INVESTMENT)



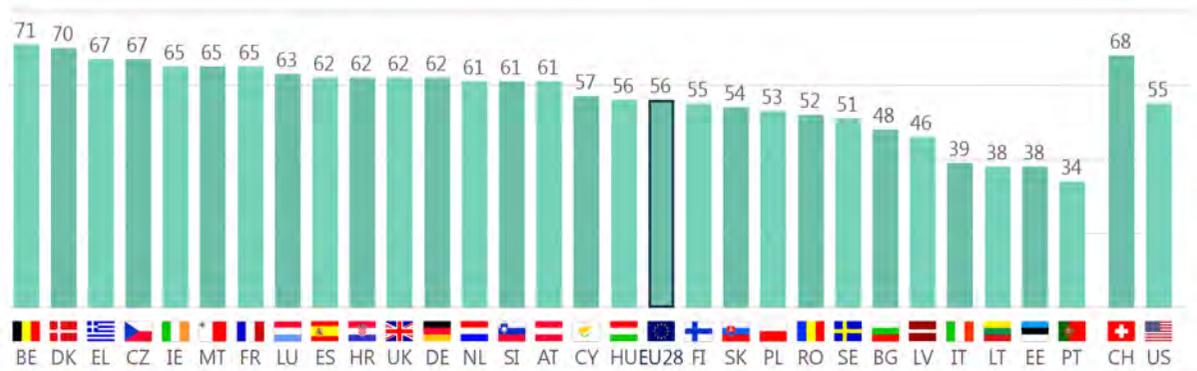
Base: All companies (n = 13,112, 100% of base)

More than half of all EU countries have invested in **company reputation and branding activities** (56%) since January 2013.

Companies in the US are slightly less likely to have invested in this area. compared to companies in the EU (55% vs. 56%). More than two thirds of companies in Switzerland (68%) have made some investment towards company reputation and branding activities since January 2013 and are more likely than the majority of EU countries to do so.

In 22 out of 28 EU Member States, the absolute majority of companies have invested in company reputation and branding activities. Businesses in Belgium (71%) and Denmark (70%) are most likely to invest compared with companies in Portugal (34%), Estonia (38%), Lithuania (38%) and Italy (39%).

Q4B.3 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?
Company reputation and branding, including web design (% - SOME INVESTMENT)



Base: All companies (n =13,112, 100% of base)

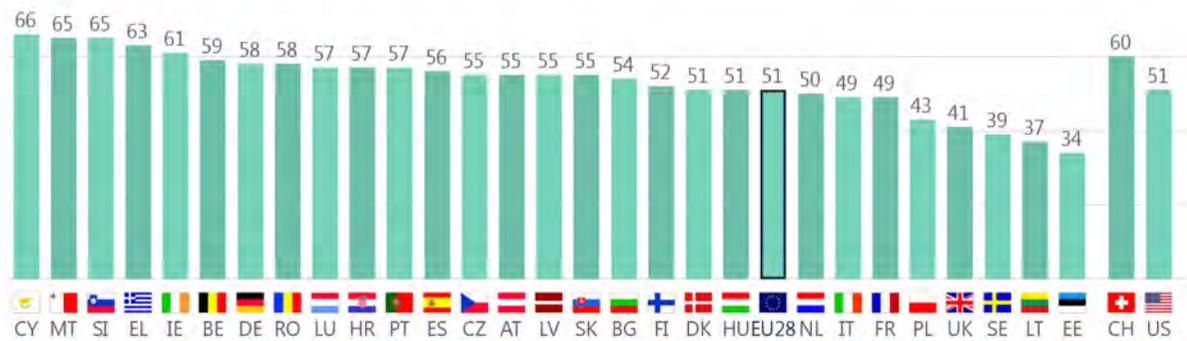
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The majority of EU businesses have made some investment towards **organization or business process improvements** (51%) since January 2013. An equal proportion of US business have made similar investments (51%). Again businesses in Switzerland are more likely to have invested in this activity than companies in the EU (60% vs. 51%).

Out of the 28 EU Member States, the absolute majority of businesses in 21 countries have invested into organization or business process improvements. Most likely to have invested in this activity are businesses in Cyprus (66%), Malta (65%) and Slovenia (65%). By contrast, just over a third of businesses in Estonia (34%) and Lithuania (37%) have made the same investment into this area.

Q4B.6 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Organisation or business process improvements (% - SOME INVESTMENT)



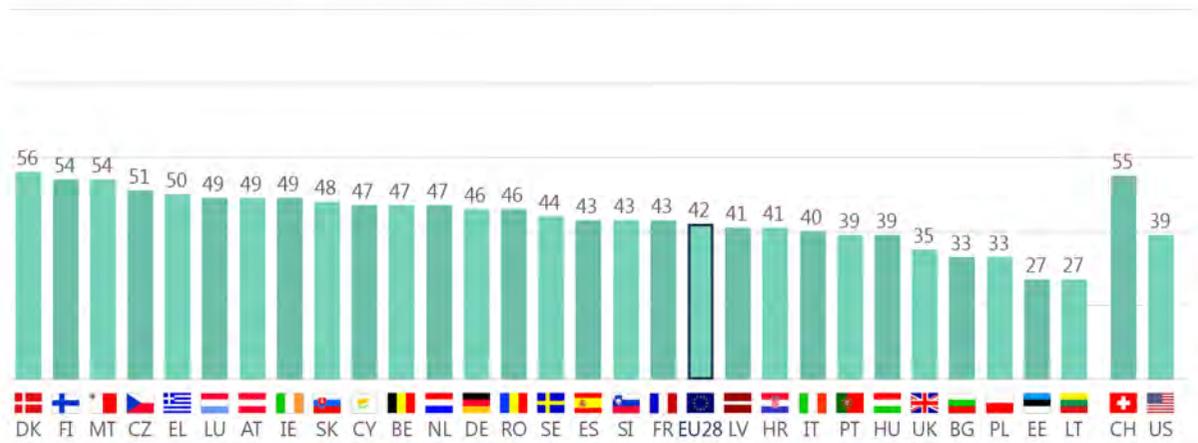
Base: All companies (n = 13,112, 100% of base)

More than four in ten EU companies have invested a proportion of turnover into the **design of products and services** (42%). With the exception of four EU countries, the majority of companies have not invested in this activity.

In comparison, again companies in the US are less likely than EU companies to invest in this activity (39% vs. 42%), yet companies in Switzerland are much more likely than their EU counterparts to make some investment towards the design of products and services (55% vs. 42%).

Companies most like to invest in this activity, with the absolute majority, can be seen in Denmark (56%), Finland (54%) and Malta (54%) whilst in Lithuania and Estonia, only 27% of businesses have invested in the design of products and services since January 2013.

Q4B.5 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?
Design of products and services (% - SOME INVESTMENT)



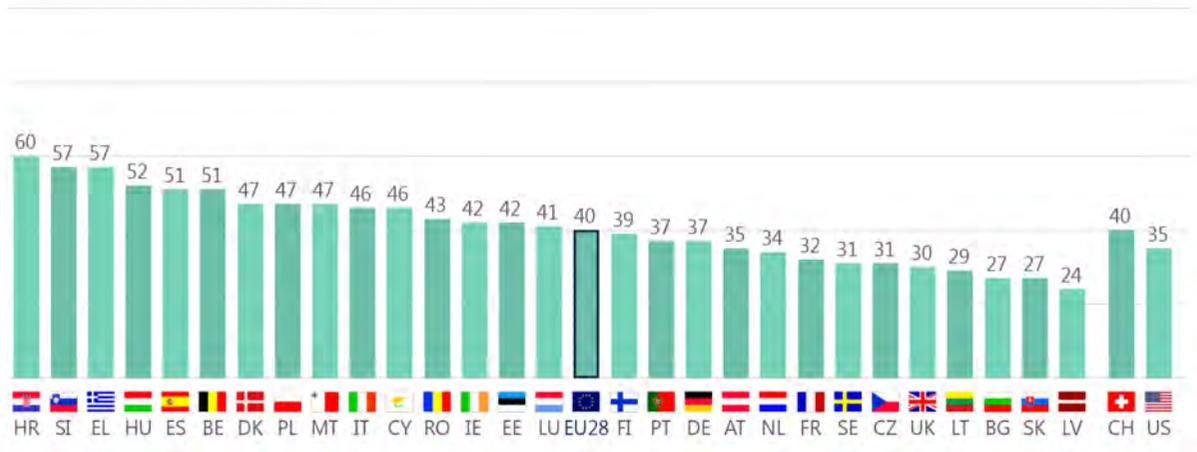
Base: All companies (n = 13,112, 100% of base)

Overall, 40% of EU businesses have invested in software development since January 2013. Again, US businesses in comparison with the EU, and Switzerland, are less likely to have invested in software development (35% vs. 40%). Four in ten companies in Switzerland (40%) have invested in this area, which is similar to their EU counterparts.

Only in six EU countries; the majority of companies have invested in the design of products and services; Croatia (60%), Slovenia (57%) and Greece (57%) have the highest proportion of businesses investing, in comparison with less than a third of businesses in Latvia (24%), Slovakia (27%) and Bulgaria (27%).

Q4B.2 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Software development (% - SOME INVESTMENT)



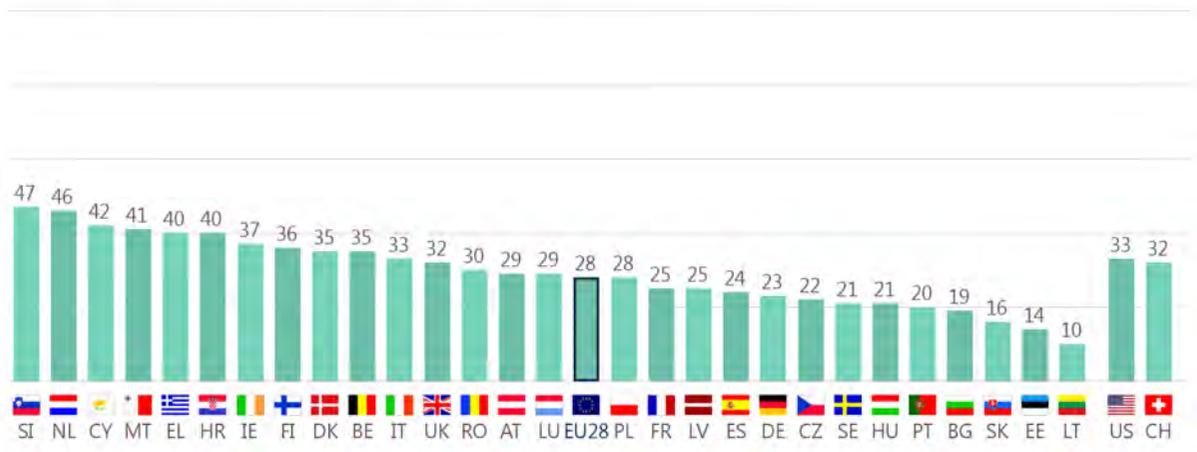
Base: All companies (n = 13,112, 100% of base)

Overall, the majority of companies in EU Member States are not investing in research and development with less than three in ten EU companies doing so (28%). Companies in both the US (33%) and Switzerland (32%) are more likely to invest in this activity than in the EU (28%).

Companies in Slovenia (47%), the Netherlands (46%) and Cyprus (42%) are more likely to invest in **research and development** than in Lithuania (10%), Estonia (14%) and Slovakia (16%).

Q4B.4 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Research and development (R&D) (% - SOME INVESTMENT)



Base: All companies (n = 13,112, 100% of base)

Evolutions since 2015

Compared with results from 2015, countries in the EU are less likely to have invested in all activities, with the largest decline observed in training (-5 percentage points).

By comparison, countries in the US are more likely to say they have invested in acquisition of machines, equipment, software or licenses (+6 pp) and software development (+7 pp).

Businesses in Switzerland are more likely to say their company has invested software development (+6 pp), company reputation and branding (+4 pp) and the design of products and services (+3 pp), but less likely to have invested in the organization or business process improvements (-4 pp).

Across the EU, there are notable changes since the last survey for several countries for each of the innovation activities explored.

For **acquisition of machines, equipment, software or licenses**, those companies that are more likely to have made some investment compared to the last survey include businesses in Romania (+16 pp) and Bulgaria (+8 pp). Less likely to have made some investment since 2015 are businesses in Italy (-10 pp) and the United Kingdom (-10 pp).

Fewer EU companies are more likely to make some investment in **training** compared to the last survey. Examples included companies in the Czech Republic (+7 pp), Greece (+7 pp) and Romania (+7 pp). The majority of EU companies are less likely to invest in training. Countries with the largest differences include in the United Kingdom (-13 pp), Italy (-13 pp) and Portugal (-11 pp).

The largest differences for **company reputation and branding** can be seen in Malta (+14 pp) and Romania (+11 pp) where companies are more likely to have invested in these activities in the last 12 months, compared to Slovakia (-11 pp) and Luxembourg (-9 pp) who are less likely to.

Companies in Cyprus (+11 pp), Bulgaria (+10 pp) and Malta (+10 pp) are more likely to have invested in **organization or business process improvements** than in the last survey. The largest decline can be seen amongst companies in Spain (-8 pp) that are less likely to invest in this area compared to 2015.

In Cyprus (+10 pp) and Malta (+12 pp), there are large increases in the proportions of companies that are more likely to have invested in the **design of products and services**. This compares to companies in the United Kingdom (-9 pp) and Portugal (-8 pp) that are less likely to have done so since the previous survey.

Higher proportions of companies in Romania (+15 pp), Hungary (+8 pp) and Estonia (+8 pp) are more likely to have invested in **software development** since the last survey. In contrast, companies in Italy (-10 pp) are less likely to do so.

Finally, for **research and development**, companies in Italy (-11 pp) and Ireland (-10 pp) are less likely to have invested in this area, compared with Malta (+9 pp), where companies are more likely to have invested.

Q4B Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

(% - SOME INVESTMENT)

		Acquisition of machines, equipment, software or licenses	2016 - 2015	Training	2016 - 2015	Company reputation and branding, including web design	2016 - 2015	Organisation or business process improvements	2016 - 2015	Design of products and services	2016 - 2015	Software development	2016 - 2015	Research and development (R&D)	2016 - 2015
EU28		68	▼2	59	▼5	56	▼3	51	▼2	42	▼2	40	▼3	28	▼3
BE		80	▲6	66	▼3	71	▲1	59	▼5	47	▼4	51	▼4	35	▼6
BG		62	▲8	49	▲2	48	▲3	54	▲10	33	▼2	27	▼1	19	▼1
CZ		70	▼1	68	▲7	67	=	55	▲2	51	▲1	31	=	22	▲1
DK		77	▲4	61	=	70	▲7	51	▲3	56	▲4	47	▲2	35	▼2
DE		81	▲3	73	▲3	62	▼1	58	▲5	46	▲5	37	▼6	23	▼3
EE		64	▼2	56	▼4	38	▲2	34	▲4	27	▲6	42	▲8	14	▲3
IE		72	=	71	▲4	65	▼4	61	▲4	49	▼2	42	=	37	▼10
EL		67	▲6	51	▲7	67	▲4	63	▲8	50	▲1	57	▲8	40	▲1
ES		72	▲4	66	▼7	62	=	56	▼8	43	=	51	▲4	24	▲2
FR		64	▲1	62	▼3	65	▼3	49	▼5	43	▼1	32	▼1	25	▼4
HR		73	=	67	▼6	62	=	57	▼2	41	▼4	60	▼3	40	▼4
IT		58	▼10	51	▼13	39	▼5	49	▼6	40	▼6	46	▼10	33	▼11
CY		61	▼2	66	▲2	57	▲2	66	▲11	47	▲10	46	▲7	42	▲2
LV		65	▼1	58	▲2	46	▼4	55	▼4	41	▼2	24	▼2	25	▼4
LT		59	▲5	46	▼8	38	▼1	37	▼4	27	▼1	29	▲3	10	▲1
LU		69	▼6	62	▼8	63	▼9	57	▼6	49	▼5	41	▼8	29	▼4
HU		75	▲6	50	▲6	56	▲3	51	▲8	39	▲6	52	▲8	21	▲2
MT		61	=	64	▲5	65	▲14	65	▲10	54	▲12	47	▲6	41	▲9
NL		62	▲1	52	▼9	61	▼5	50	▼1	47	▼2	34	▼4	46	▲1
AT		73	▼5	71	▲2	61	=	55	▼2	49	▼2	35	▼2	29	▲5
PL		73	▲1	55	▼2	53	▼5	43	▼5	33	▼3	47	▼1	28	▼2
PT		66	▼5	55	▼11	34	▼7	57	▼4	39	▼8	37	▼7	20	▼7
RO		71	▲16	64	▲7	52	▲11	58	▲7	46	▲3	43	▲15	30	▲3
SI		83	▲6	71	▲4	61	▲4	65	▲6	43	▼3	57	▲1	47	▲1
SK		74	▲4	59	▼7	54	▼11	55	▲6	48	▲5	27	▼5	16	▼5
FI		78	▼2	63	▼3	55	▼3	52	▲7	54	▲1	39	▼3	36	▼2
SE		75	▼3	64	▲2	51	▼2	39	▼3	44	▲1	31	▼1	21	▼2
UK		59	▼10	49	▼13	62	▼3	41	▼5	35	▼9	30	▼6	32	▼6
US		66	▲6	53	▲1	55	▲2	51	▲2	39	▼2	35	▲7	33	=
CH		79	▲1	70	▼2	68	▲4	60	▼4	55	▲3	40	▲6	32	=

Base: All companies (n = 13,112, 100% of base)

Company characteristics

- Companies with employees 10+ are more likely than smaller companies 1-9 employees to have made some investment across all activities, for example in **training** (78-80% vs. 56%).
- Industry (67%) and service (64%) sector companies are more likely to invest in **training** than retail (52%) and manufacturing (53%) companies. For **software development**, the opposite is more likely. For example, 45% of services companies invested in software development in comparison with 33% of industry companies.
- Industry businesses are also more likely to have invested in the **acquisition of machines, equipment, software or licences** than manufacturing businesses (74% vs. 64%).
- In general, companies with a turnover risen by 5% or more are more likely to have invested in all of the activities compared with declining turnover companies, e.g. the **design of products and services** (54% vs. 35%).
- Companies that have made at least one innovation are also more likely to have invested in innovation-related activities, for example in **training** (66% vs. 46%).

Q4B Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

SOME INVESTMENT (% - EU)

	Acquisition of machines, equipment, software or licenses	Training	Company reputation and branding, including web design	Organisation or business process improvements	Design of products and services	Software development	Research and development (R&D)
EU28	68	59	56	51	42	40	28
Company size							
1-9	66	56	54	48	40	38	26
10-49	80	80	71	68	53	51	38
50-249	80	78	70	69	60	60	41
250+	87	79	79	71	56	55	56
Sectors grouped (NACE)							
Manufacturing (C)	64	53	51	53	49	32	37
Retail (G)	62	52	54	47	39	40	25
Services (H/I/J/K/L/M/N/R)	71	64	60	56	47	45	31
Industry (D/E/F)	74	67	55	49	33	33	24
Company's turnover since 2013							
Risen by 5% or more	81	69	69	64	54	49	36
Remained approx. the same	68	61	55	48	38	40	27
Fallen by 5% or more	53	47	43	43	35	32	23
Innovation							
At least one	74	66	66	63	54	47	36
None	55	46	36	28	20	26	12
Goods or services innovators	75	66	66	64	56	48	38
Other innovators	72	64	66	57	41	42	24
Non-innovators	55	46	36	28	20	26	12

II. PROBLEMS AND PUBLIC SUPPORT RELATED TO THE COMMERCIALISATION OF (INNOVATIVE) GOODS OR SERVICES

This section analyses the types of problems faced by companies that are attempting to commercialize their goods or services and determines the types of intervention that would have the most positive impacts on companies.

1 Problems related to the commercialisation of goods and services for companies that have introduced innovations

Majority of companies say a market dominated by established competitors is a problem.

Companies that have introduced **innovative** goods or services since January 2013 were asked to think about the commercialization of their company's **innovative** goods or services since January 2013, and determine what types of problems they had faced and their respective importance⁹.

Almost two thirds of companies say a market dominated by established competitors (65%) is a problem in the commercialization of innovative goods or services. More than half of the companies surveyed say the lack of financial resources (58%) or the cost or complexity of meeting regulations or standards (57%) are problems faced in the commercialization process. More than a quarter of companies say each of these issues is a major problem .

Less than half of all companies say lack of human resources (49%) is a problem for commercializing innovative goods or services with 26% of companies considering this to be a minor problem and 23% considering this issue to be a major problem.

More than four in ten companies consider administrative or legal issues (46%), low demand for their innovative goods or service (45%) and lack of marketing expertise (41%) as problems faced during the commercialization of their innovative goods or services. Slightly less than a third of these companies are more likely to classify these issues as minor problems than major problems.

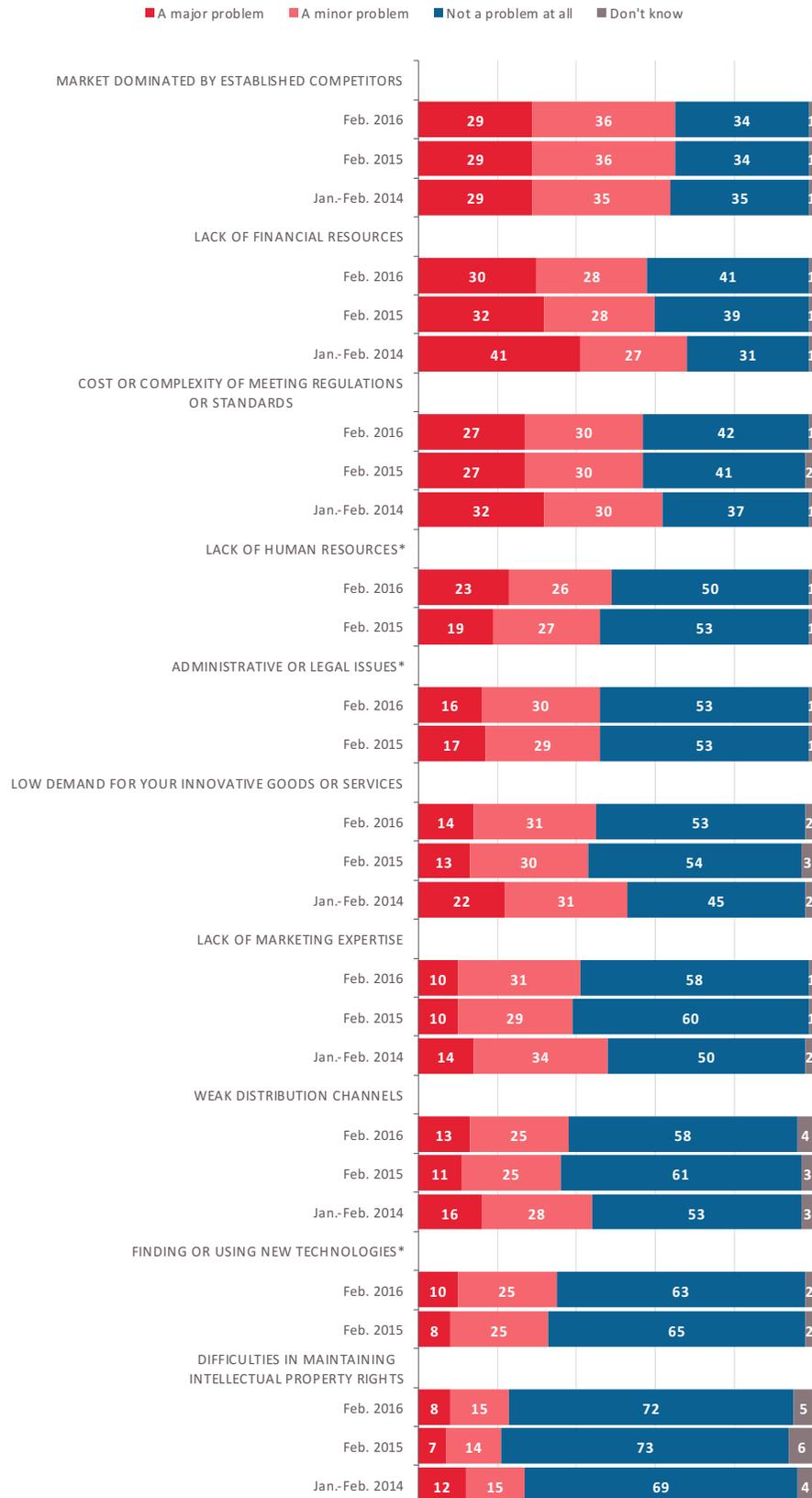
Fewer than four in ten companies claim weak distribution channels (38%) and finding or using new technologies (35%) to be a problem. Businesses are more likely to say these are minor problems (25% for both types).

Finally, less than a quarter of businesses find difficulties in maintaining intellectual property rights (23%) to be a problem. Less than one in ten consider it be a major problem (8%).

Since the last survey in 2015, there are minor differences. Most notably, companies are more likely to say that a lack of human resources is a major problem (+4 percentage points).

⁹ Q5A. Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all. ANSWERS: Market dominated by established competitors; Lack of financial resources; Cost or complexity of meeting regulations or standards; Lack of human resources; Administrative or legal issues; Low demand for your innovative goods or services; Lack of marketing expertise; Weak distribution channels; Finding or using new technologies; Difficulties in maintaining intellectual property rights.

Q5A Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all? (% - EU)



Base: Companies that have introduced innovative goods or services since January 2013 (n = 7329, 56% of base)

February 2016

Country analysis

Almost two thirds of EU companies (65%) consider a market dominated by established competitors as a problem when trying to commercialise their innovative goods or services. Since the last survey there has been no change for the EU overall.

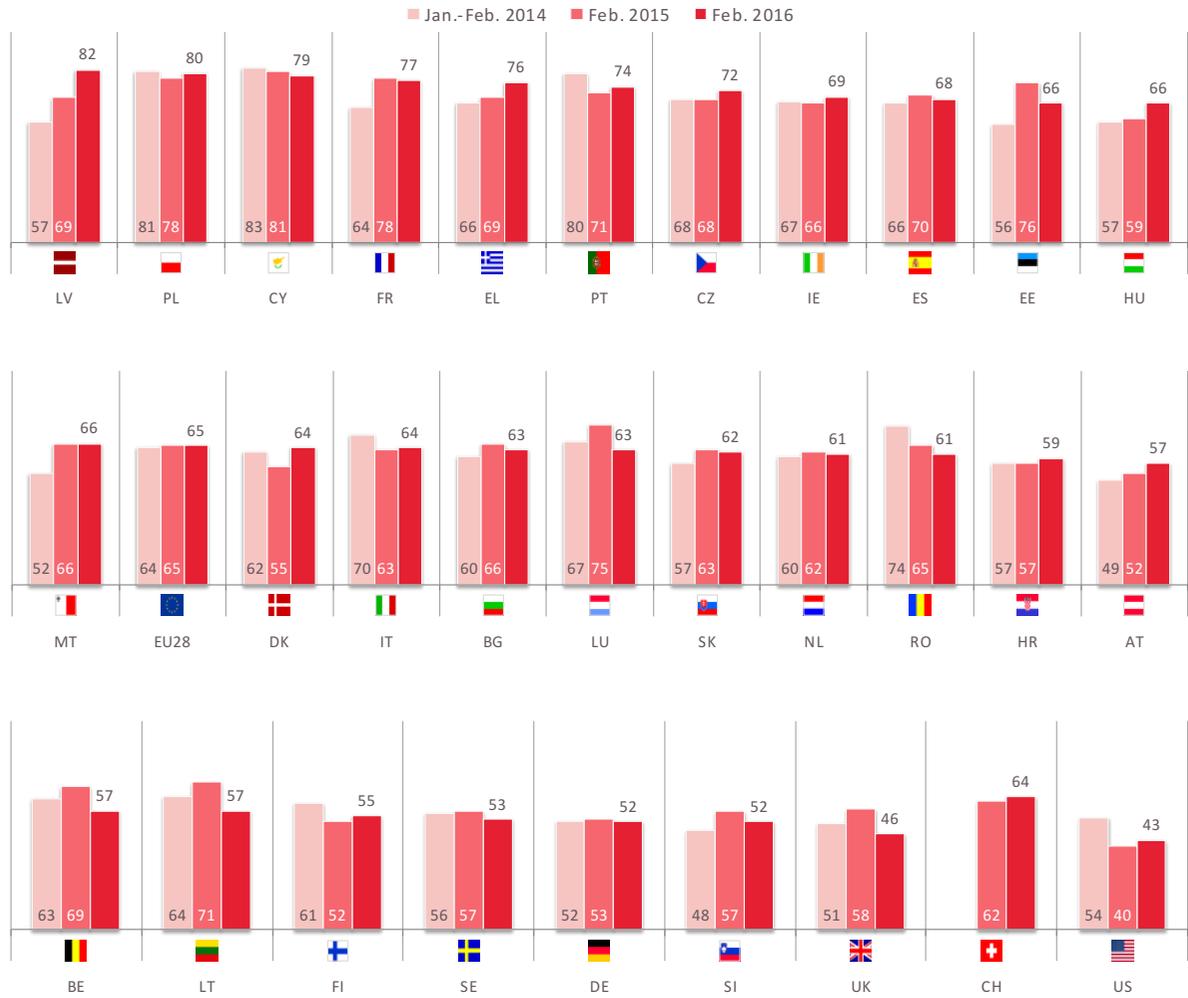
In comparison, companies in the US are less likely to say a **market dominated by established competitors** is a problem (65% vs. 43%) however US businesses are more likely to say this is a problem compared to 2015 (+3 percentage points).

Businesses in Switzerland hold a similar view to those in the EU (64% vs. 65%). Since the last survey, businesses in Switzerland are slightly more likely to have this view (+2 pp).

With the exception of the United Kingdom (46%), the absolute majority of businesses in each EU country consider a that market dominated by established competitors to be a problem when commercializing their innovative goods or service. Businesses in Latvia (82%), Poland (80%) and Cyprus (79%) are more likely to consider this a problem, than businesses in Slovenia (52%), Germany (52%) and Sweden (53%) and the United Kingdom as mentioned previously.

An analysis of **evolutions** at a country level shows several notable declines. Businesses in Lithuania (-14 pp), Belgium (-12 pp), Luxembourg (-12 pp), United Kingdom (-12 pp) and Estonia (-10 pp) are less likely to consider a market dominated by established competitors to be a problem when commercializing their innovative goods or service. In contrast, businesses in Latvia (+13 pp) and Denmark (+9 pp) are more likely to consider this to be a problem since 2015. For businesses in Latvia, this issue appears to be increasingly of concern as the proportion has increased significantly since the survey in 2014 (+25 pp since 2014).

Q5A.8 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?
Market dominated by established competitors
 (% - TOTAL 'A PROBLEM')



Base : Companies that have introduced innovative goods or services since January 2013 (n = 7329, 56% of base)

February 2016

More than half of EU companies consider **lack of financial resources** (58%) to be a problem when commercializing innovative goods or services. This is slightly fewer compared to the last survey in 2015 (-2 pp).

Less than four in ten US companies consider lack of financial resources (39%) to be a problem when commercializing innovative goods or services. They are less likely than businesses in the EU to say this is a problem (39% vs. 58%). In comparison with the last survey, US businesses more likely to say this is a problem (+5 pp).

The majority of companies in Switzerland (54%) say lack of financial resources is a problem and are slightly less likely than businesses in the EU to consider this as a problem (54% vs. 58%). Since the last survey, businesses in Switzerland are much more likely to say this is a problem (+15 pp).

In 19 EU Member States, at least half of the businesses surveyed consider lack of financial resources is a problem when trying to commercialize innovative goods or services. The highest proportion of businesses that say lack of financial resources is a problem can be seen in Greece (84%), Croatia (79%) and Slovakia (75%). Businesses in Sweden (36%), Austria (42%) and Denmark (42%) are less likely to consider lack of financial resources as a problem.

Taking a look at **evolutions** since 2015, there are some more notable differences at a country level. For example, businesses in Luxembourg (-18 pp), Spain (-13 pp) and Cyprus (-11 pp) are now less likely to say this is a problem than in 2015. On the other hand, companies in Slovenia (+9 pp), Slovakia (+8 pp) and Germany (+7 pp) are more likely to consider a lack of financial resources to be a problem compared to the previous survey in 2015.

In comparison to results from the 2014 survey, there have been some notable changes of opinion for this particular problem. For example, businesses in Cyprus (-31 pp), Spain (-28 pp), Romania (-23 pp) and Italy (-21 pp) are less likely to consider a lack of financial resources to be a problem when commercializing innovative goods or services.

Q5A.2 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Lack of financial resources
(% - TOTAL 'A PROBLEM')



Base : Companies that have introduced innovative goods or services since January 2013 (n = 7329, 56% of base)

February 2016

More than half of EU companies say the **cost or complexity of meeting regulations or standards** (57%) is a problem when trying to commercialize their company's innovative goods or services since January 2013. There has been no change since the last survey in 2015.

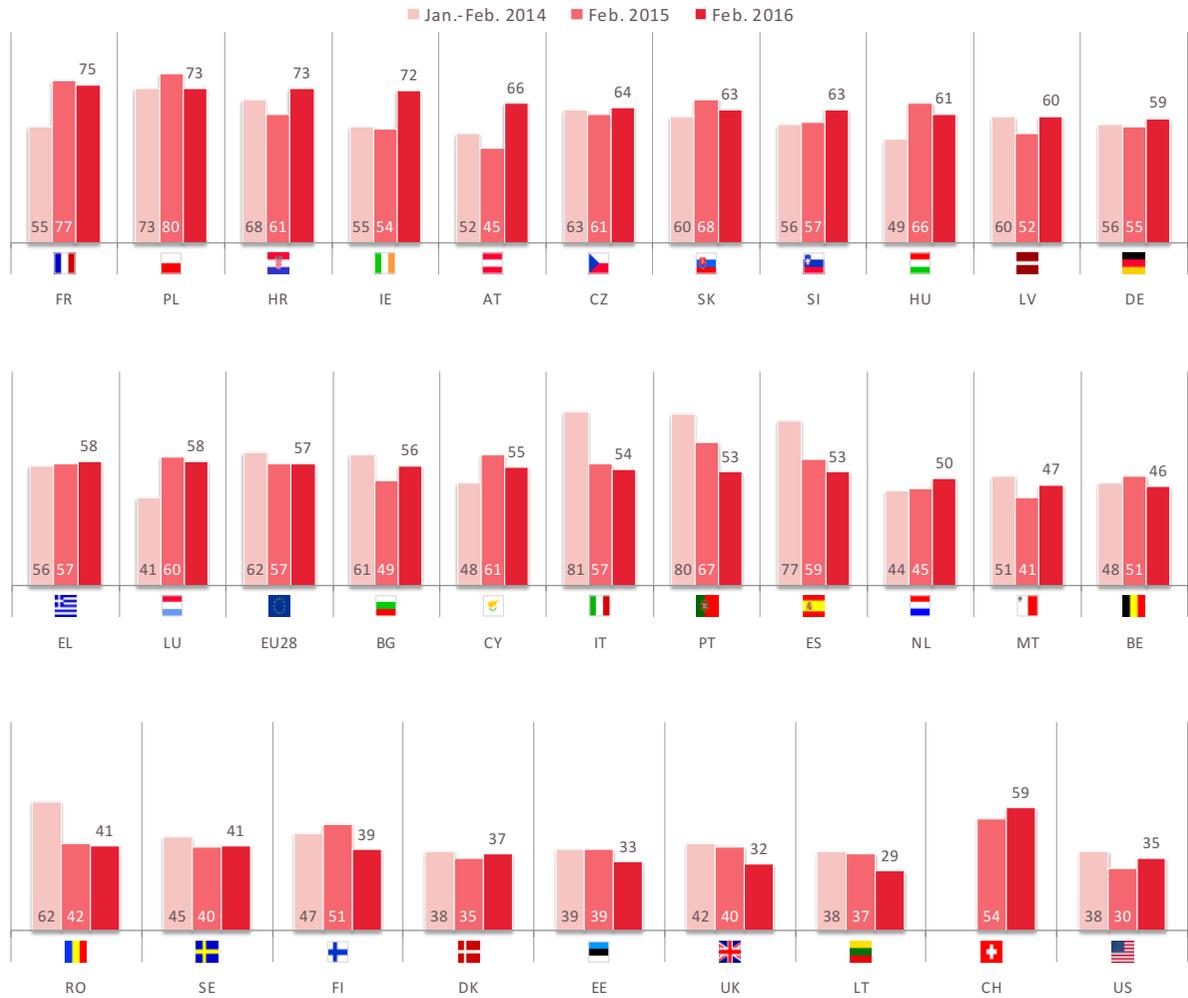
On the other hand, just 35% of US businesses say the cost or complexity of meeting regulations or standards is a problem when trying to commercialize their company's innovative goods or services, which is much less likely than EU businesses (35% vs. 57%). US companies are more likely to consider this issue to be a problem since the last survey (+5 pp).

An increasing majority of companies in Switzerland consider this to be a problem when trying to commercialize their innovative goods or services (59%, +5 pp). They are slightly more likely to have this view than businesses across the EU (59% vs. 57%).

Across the EU, countries with the highest proportions of businesses that say cost or the complexity of meeting regulations or standards are a problem include France (75%), Poland (73%) and Croatia (73%), while a third or less of businesses in Lithuania (29%), the United Kingdom (32%) and Estonia (33%) consider this to be a problem.

Since the last survey, there have been large movements in opinion amongst some of the businesses in the EU. Businesses in Austria (+21 pp), Ireland (+18 pp) and Croatia (+12 pp) are more likely to say that the cost or complexity of meeting regulations or standards is a problem compared to results from the 2015 survey. By contrast, companies in Portugal (-14 pp) and Finland (-12 pp) now are less likely to consider this a problem than in 2015.

Q5A.4 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?
Cost or complexity of meeting regulations or standards
 (% - TOTAL 'A PROBLEM')



Base : Companies that have introduced innovative goods or services since January 2013 (n = 7329, 56% of base)

An analysis of **company characteristics** shows:

- Manufacturing companies are more likely to say a **market dominated by competitors** has been a problem compared to industry companies (69% vs. 61%).
- Companies with a turnover fallen by 5% or more are more likely to say there has been a problem commercializing their innovative goods or service due to a **market dominated by competitors** than growing turnover companies (73% vs. 66%).
- **Lack of financial resources** is more likely to be a problem for smaller companies (1-9 employees) than for larger companies with 50+ employees (59% vs. 43-49%).
- For companies with a falling turnover, a **lack of financial resources** is also more likely to be a problem than for those with growing turnovers (72% vs. 54%).
- **Cost or complexity of meeting regulations or standards** is more likely to be a problem for companies in the industry sector than for companies in other sectors (63% vs. 55-56%).

Q5A Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

TOTAL 'A PROBLEM' (% - EU)

	Market dominated by established competitors	Lack of financial resources	Cost or complexity of meeting regulations or standards
EU28	65	58	57
Company size			
1-9	65	59	56
10-49	69	55	62
50-249	54	43	56
250+	72	49	60
Sectors grouped (NACE)			
Manufacturing (C)	69	59	55
Retail (G)	66	58	56
Services (H/I/J/K/L/M/N/R)	65	58	56
Industry (D/E/F)	61	62	63
Company's turnover since 2013			
Risen by 5% or more	66	54	57
Remained approx. the same	61	55	55
Fallen by 5% or more	73	72	60

February 2016

2 Problems related to the commercialisation of goods and services for companies that have not introduced any innovations

A market dominated by established competitors & lack of financial resources are also problems for the commercialization of non-innovative goods or services

Companies that have not introduced any innovative goods or services since January 2013 were also asked about the problems they faced commercializing their goods or service.

Similar to the last survey in 2015, overall companies are less likely to consider these issues as problems, compared with companies introducing innovative goods or services. For example, 54% of companies that have not introduced any innovative goods or services consider established competitors as a problem compared to almost two thirds of companies that have introduced an innovative goods or service (65%).

The problem most mentioned by the absolute majority of non-innovative companies is a market dominated by established competitors (54%); 24% of companies (+2 percentage points) consider it a major problem, (30%, -1 pp) consider it a minor problem.

Slightly less than half of companies mentioned lack of financial resources (49%) as a problem with very little change from the last survey (+1 pp); 24% of the companies consider it a major problem, 25% consider it a minor problem.

The third most mentioned problem, by 48% of companies, is cost and complexity of meeting regulations or standards - a slight increase from the last survey (+2 pp) - followed by low demand for goods or services (46%, +2 pp).

At least three in ten companies consider administrative or legal issues (39%), lack of human resources (35%) and lack of marketing expertise (31%) as problems.

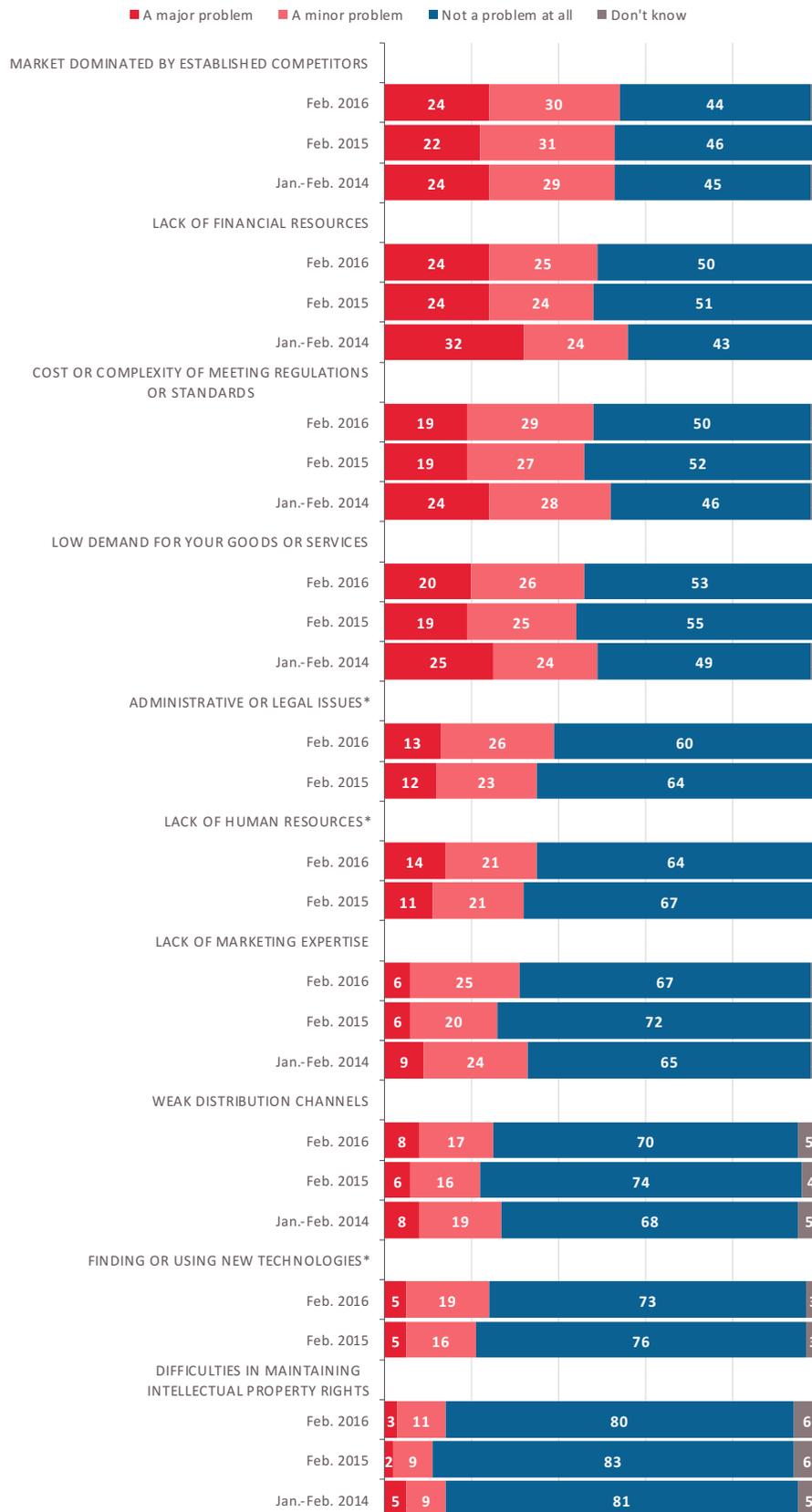
Weak distribution channels (25%) and finding or using new technologies (24%) are considered a problem by less than a quarter of all companies.

80% of companies do not think difficulties in maintaining intellectual property rights is a problem (14% consider it a problem).

Evolutions since 2015

Compared with the last survey in 2015, there are very small differences for each of the issues explored. The largest difference is the lack of marketing expertise (+ 5 pp). Administrative and legal issues are also seen to be more of a problem by companies since 2015 (+4 pp).

Q5B Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all? (% - EU)



Base: Companies that have not introduced innovative goods or services since January 2013 (n = 5783), 44% of base

February 2016

Country analysis

The three most often cited issues for non-innovative goods or service companies are also analysed at the country level.

Slightly more than half of all EU companies that have not introduced an innovative goods or service consider a **market dominated by established competitors (54%)** to be a problem. This compares with 65% of companies that have introduced an innovative goods or service. Since the last survey in 2015, there has been a slight increase (+1 pp).

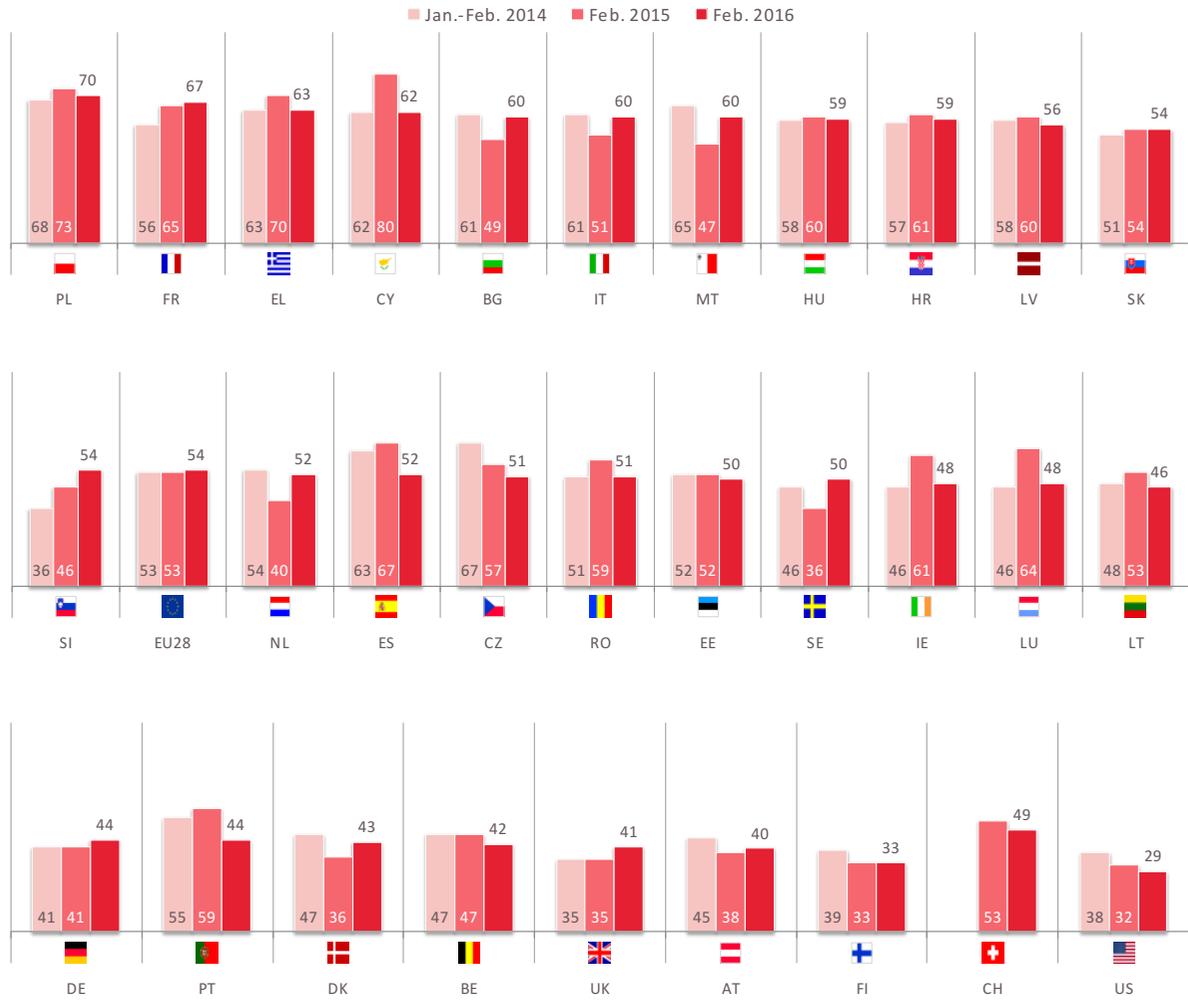
In the US, companies are much less likely than companies in the EU, to consider a market dominated by established competitors to be a problem (29% vs. 54%). Since the last survey, US companies are slightly less likely to think this (-3 percentage points).

Companies in Switzerland seem to be a little more aligned with the EU view on this issue than companies in the US (49% vs. 54%). Since the last survey, companies in Switzerland are less likely to consider this as a problem (-4 pp).

Turning to the EU countries, the majority of companies in 18 countries think a market dominated by established competitors is a problem when commercializing their goods or service since January 2013. For the remaining countries, at least a third of all companies consider this a problem. More than two thirds of non-innovative companies in Poland (70%) and France (67%) think so compared to 33% of companies in Finland, 40% in Austria and 41% in the United Kingdom.

Since 2015, there have been some notable changes at country level. Companies in Cyprus (-18 pp), Luxembourg (-16 pp), Spain (-15 pp), Portugal (-15 pp) and Ireland (-13) are now less likely to consider the established competitors as a problem. Conversely, companies in Sweden (+14 pp), Malta (+13 pp), the Netherlands (+12 pp) and Bulgaria (+11 pp) are more likely to consider a market dominated by established competitors as a problem.

Q5B.8 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?
Market dominated by established competitors
 (% - TOTAL 'A PROBLEM')



Base: Companies that have not introduced innovative goods or services since January 2013 (n = 5783), 44% of overall companies

Slightly less than half of all EU companies (49%, +1 pp) that have not introduced an innovative goods or service consider **lack of financial resources** to be a problem when trying to commercialize their goods and services.

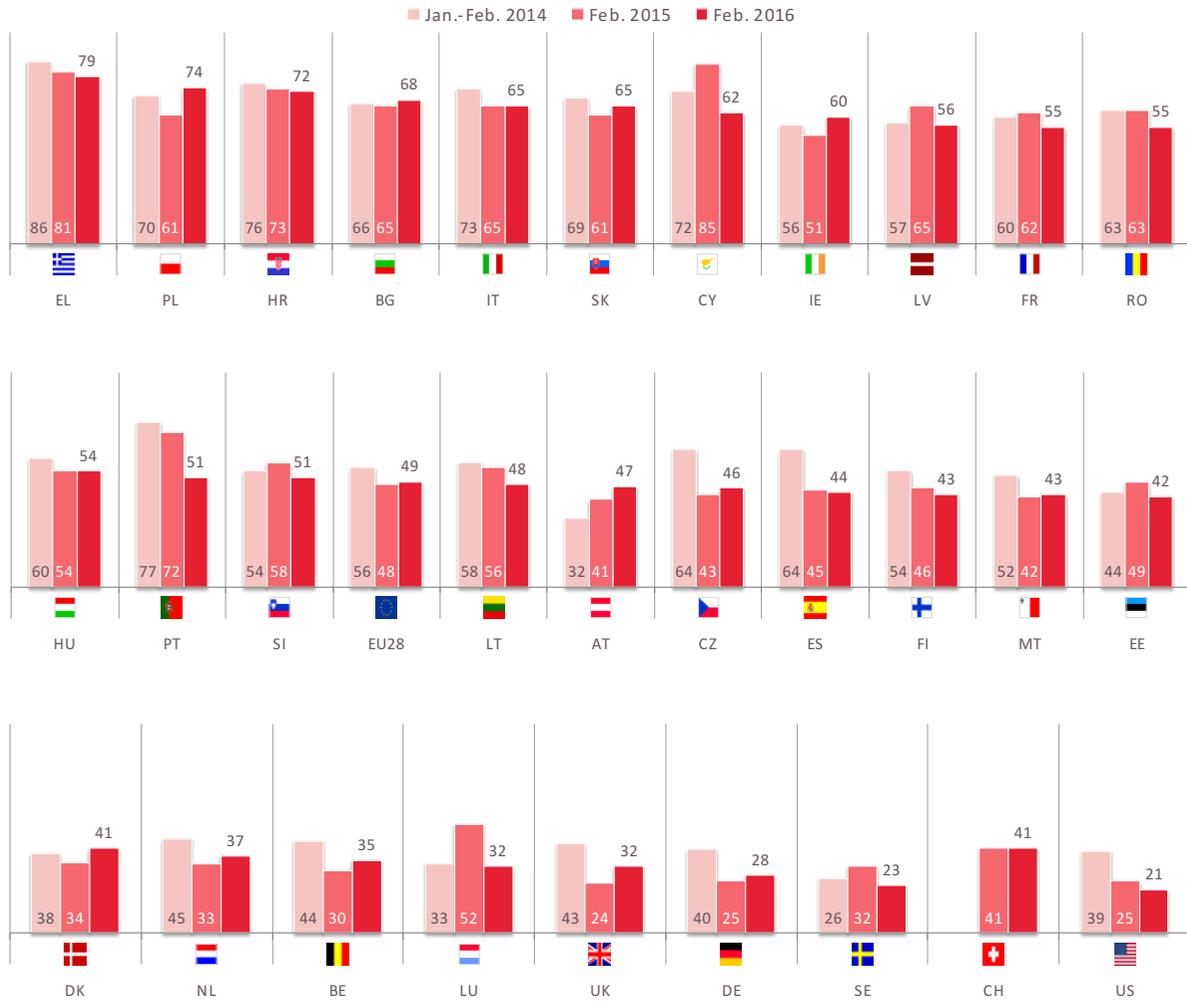
Again, for this problem, US companies that have not innovated, are much less likely than EU countries to consider lack of financial resources as a problem (21% vs. 49%). In fact, since the last survey in 2015, this is even less of an issue for US companies (-4 percentage points).

More than four in ten companies in Switzerland (41%, +/- 0 pp) consider lack of financial resources to be a problem are less likely to think this compared to companies in the EU (49%).

In 14 EU countries, the majority of companies consider lack of financial resources as a problem. Including companies in Greece (79%), Poland (74%) and Croatia (72%) mention this as a problem when trying to commercialize their goods or service. Lack of financial resources seems to be a problem mentioned by less than a third of companies in Germany (28%) and Sweden (23%) in comparison.

Compared to the last survey, there have been some changes at country level. In 2016, companies in Cyprus (-23 pp), Portugal (-21 pp) and Luxembourg (-20 pp) are less likely to consider lack of financial resources as a problem when commercializing their goods or service. This can be compared with companies in Poland (+13 pp), Ireland (+9 pp) and the United Kingdom (+8 pp), where they are more likely to currently consider this lack of financial resources as a problem.

Q5B.2 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?
Lack of financial resources
 (% - TOTAL 'A PROBLEM')



Base: Companies that have not introduced innovative goods or services since January 2013 (n = 5783), 44% overall companies

February 2016

More than four in ten EU companies (48%) that have not introduced an innovative goods or service are likely to think **cost or complexity of meeting regulations or standards** is a problem when trying to commercialise their goods or services. Since 2015, EU companies are slightly more likely to consider this issue a problem (+2 pp).

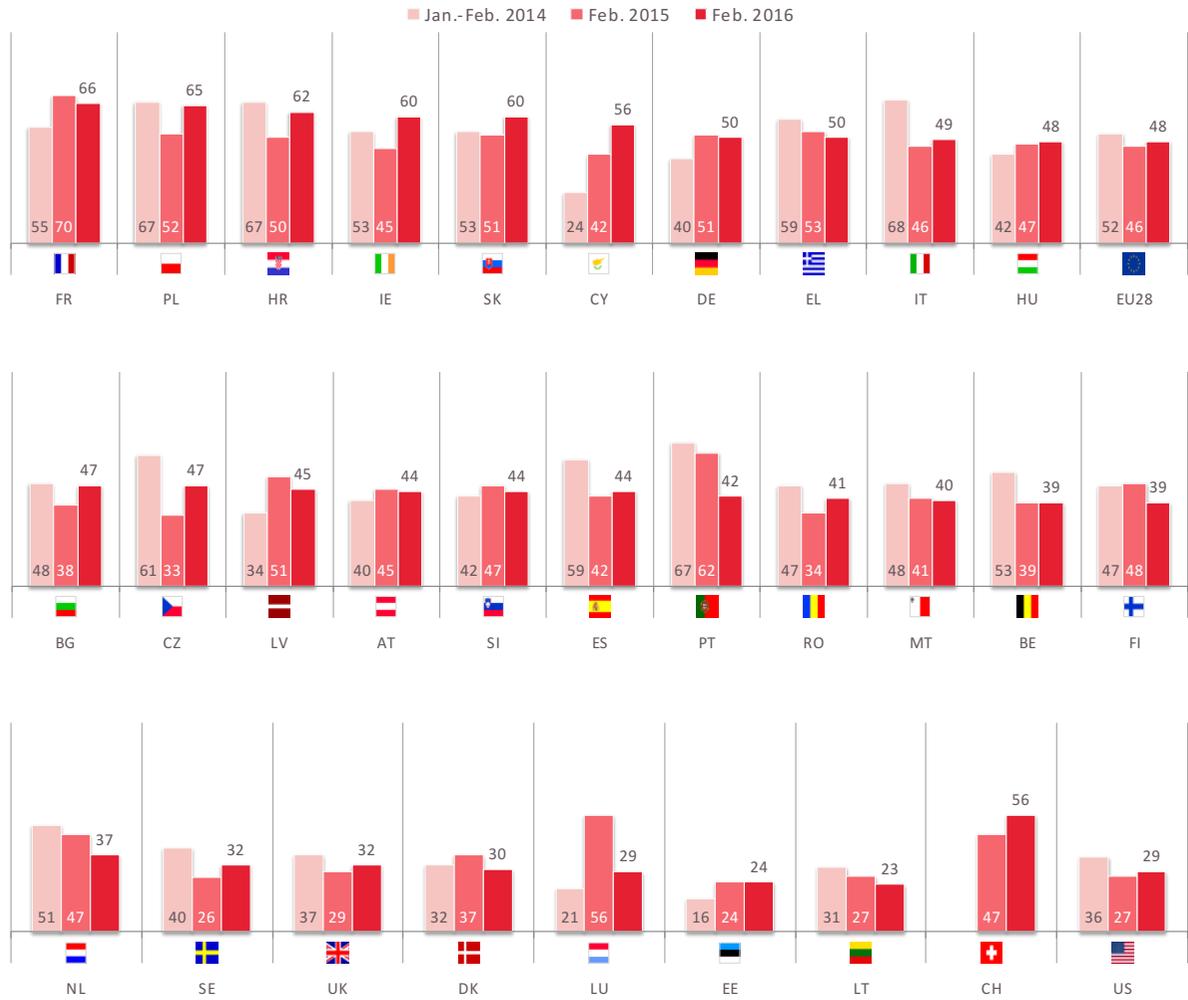
US Companies that haven't introduced an innovative good or service are less likely to consider this issue a problem when trying to commercialise their goods or services than EU countries (29% vs. 48%). Since the last survey, slightly more companies in the US think so (+2 pp).

Compared to EU businesses, non-innovative companies in Switzerland are more likely to think cost or complexity of meeting regulations or standards is a problem when trying to commercialise their goods or services (56% vs. 48%). This is an increasing issue for companies in Switzerland since the last survey (+9 pp).

In six EU countries, the absolute majority of companies consider cost or complexity of meeting regulations or standards as a problem, while at least two thirds of companies in 16 countries have this view. Companies in France (66%), Poland (65%) and Croatia (62%) are more likely to consider this a problem, whilst fewer than a quarter of companies in Estonia (24%) and Lithuania (23%) mention this.

Since 2015, there have been several changes at country level even though the EU average has only increased by two percentage points. The largest differences since the last survey are observed in Luxembourg (-27 pp), Portugal (-20 pp) and the Netherlands (-10 pp) where companies are less likely to consider costs or complexities of meeting standards as a problem. This is in contrast to countries where there are increasing concerns amongst non-innovative companies in Ireland (+15 pp), Cyprus (+14 pp), Czech Republic (+14 pp), Poland (+13 pp) and Croatia (+12 pp).

Q5B.4 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?
Cost or complexity of meeting regulations or standards
 (% - TOTAL 'A PROBLEM')



Base: Companies that have not introduced innovative goods or services since January 2013 (n = 5783), 44% overall companies

An analysis of **company characteristics** for these top 3 issues shows:

- The smaller the company, the more likely they are to consider **established competitors** as a problem, for example 54% for 1-9 employees vs. 32% for 250+ employees. Smaller companies are also more likely to be concerned about a lack of financial resources (50% for companies with 1-9 employees vs. 34-35% for companies with 50+ employees).
- Companies with a falling turnover by 5% or more are more likely to **think established competitors** are a problem compared to growing turnover companies (64% vs. 53%). This pattern can be also found for **lack of financial resources** (66% vs. 48%) and **cost and complexity of meeting regulations or standards** (58% vs. 47%).
- Companies that plan to reduce their investment dedicated to innovation in the next 12 months, are more likely to consider **established competitors** as a problem than companies that are planning to increase investment (89% vs. 61%). There is a similar pattern observed for **lack of financial resources** (93% vs. 65%) and **cost and complexity of meeting regulations or standards** (95% vs. 52%).
- Companies in the services sector are less likely to think **lack of financial resources** is a problem than companies in other sectors (45% vs. 50-54%).
- Mid-sized companies with 10-49 employees and 50-249 employees are more likely than larger companies to say the **cost and complexity of meeting regulations or standards** is a problem (55-58% vs. 40%).
- Manufacturing companies are more likely to say the **cost and complexity of meeting regulations or standards** than industry companies (51% vs. 46%).

Q5B Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

TOTAL 'A PROBLEM' (% - EU)

	Market dominated by established competitors	Lack of financial resources	Cost or complexity of meeting regulations or standards
EU28	54	49	48
Company size			
1-9	54	50	47
10-49	54	45	55
50-249	62	34	58
250+	32	35	40
Sectors grouped (NACE)			
Manufacturing (C)	54	54	51
Retail (G)	58	53	48
Services (H/I/J/K/L/M/N/R)	52	45	48
Industry (D/E/F)	51	50	46
Company's turnover since 2013			
Risen by 5% or more	53	48	47
Remained approx. the same	48	41	42
Fallen by 5% or more	64	66	58
Planned % of investment dedicated to in			
Increase	61	65	52
Reduce	89	93	95
Keep % unchanged	58	53	55
No plan to invest	58	46	60

3 Public support for the commercialisation of goods and services for companies that have introduced innovation

Supporting the training of staff in how to promote and market innovative goods or services would have the most impact on a company.

Companies that have introduced an innovative good or service since January 2013 were asked to think about possible public support for commercialization of their innovative good or service and nominate which two types of intervention would have the most impact on their company¹⁰. The results below are compared with those from the last survey in 2015.

Slightly less than three in ten companies that have introduced an innovative good or service think support for **training of staff in how to promote and market innovative goods or services** (29%, -1 pp) would be the type of public support that would have the most positive impact.

At least a quarter say **accessing or reinforcing online selling** (26%, +3 pp) and only slightly less say **participating in conferences, trade fairs, exhibitions** (24%, +2 pp) would have the most positive impact.

Meeting regulations or standards is mentioned by 19% of innovative companies (-1 pp). At least one in ten companies think public support which **accesses or reinforces your presence in export markets** (14%, -3 pp) and **market testing a product or service before launch** (10%, +1 pp) would have the most positive impact on the commercialization of their innovative goods or services. Only a small proportion of companies think public support in the form of **applying for, managing or protecting intellectual property rights** (5%, -1pp) would have a positive impact.

Of all companies, 15% mentioned that **none** of these interventions would make a positive impact on the commercialization of their innovative goods or services which is the same proportion of companies compared with results from the last survey in 2015.

Q6A Thinking about possible public support for commercialisation of your innovative goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS) (% - EU)



Base: Companies that have introduced innovative goods or services since January 2013 (n = 7329), 56% of base

¹⁰ Q6A. Thinking about possible public support for commercialisation of your innovative goods or services, which of the following two types of intervention would have the most positive impact on your company? ANSWERS: Meeting regulations of standards; Accessing or reinforcing online selling; Participating in conferences, trade fairs, exhibitions; Training staff in how to promote and market innovative goods or services; Applying for, managing or protecting intellectual property rights; Market-testing a product or service before launch; Accessing or reinforcing your presence in export markets. Other; None; Don't know/not applicable.

Country analysis

Similar to the EU average, almost a third of companies in the US think training staff in how to promote and market innovative goods or services would make the most positive impact on their company (30% vs. 29%). However, since the last survey, US companies are less likely to think this (-13 pp). A quarter of US companies think accessing or reinforcing online selling would make the most positive impact (25%, -2 pp) and 20% consider public support for participating in conferences, trade fairs and exhibitions as interventions that would have positive impacts on the businesses. US companies are less likely than EU companies to think participating in such events would make a positive impact (20% vs. 24%).

Companies in Switzerland are less likely than companies in the EU to think that public support for the training staff in how to promote and market innovative goods or services (20% vs. 29%) and accessing or reinforcing online selling (20% vs. 26%) would have the most positive impact. Since 2015, for both types of intervention there has been an increase in support amongst companies in Switzerland by 6 percentage points and 9 percentage points respectively.

At least one fifth of all companies in 26 EU countries say that public support for training staff in how to promote and market innovative goods or services would make the most positive impact. This is the case for more than four in ten companies in Belgium (46%), Luxembourg (44%) and Romania (41%) and less likely to be the view of companies in Slovenia (17%) and Denmark (19%).

Companies in Italy (34%), Greece (33%) and the United Kingdom (32%) are more likely to say that accessing or reinforcing online selling would make a positive impact than in Malta and Luxembourg (12% both).

Participating in conferences, trade fairs and exhibitions is mentioned by at least 20% of companies in 25 EU countries. Almost half of the companies in Malta (48%) think this intervention would have the most positive impact. This type of public support is also mentioned widely by 36% of companies in Greece and Latvia. Companies in Bulgaria and Italy (both 16%) are least likely to think this type of intervention would have a positive impact.

Evolutions from 2015

Since the survey in 2015, there have been small movements at an EU level, the largest increase observed amongst companies supporting **accessing or reinforcing online selling** (+3 percentage points)

For **training staff in how to promote and market innovative goods or services**, there has been a slight decline at the EU level (-1 pp), however amongst individual countries there have been larger changes. Companies in Belgium (+13 pp) and Hungary (+9 pp) and Bulgaria (+9 pp) are more likely to show support since the last survey, while companies in Estonia (-15 pp) and the United Kingdom (-12 pp) are less likely to think this.

Compared to results in 2015, companies in Hungary (+11 pp) and Belgium (+10 pp) are more likely to say **accessing or reinforcing online selling** would have the most positive impact, while companies in Ireland (-16 pp) and Malta (-14 pp) are less inclined to say so.

Participating in conferences, trade fairs and exhibitions is much more likely to be mentioned as having a positive impact by companies in Denmark (+16 pp) and Malta (+12 pp) compared with companies in Croatia (-11 pp) and Hungary (-9 pp).

Q6A Thinking about possible public support for commercialisation of your innovative goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS)
(%)

		Training staff in how to promote and market innovative goods or services	2016 - 2015	Accessing or reinforcing online selling	2016 - 2015	Participating in conferences, trade fairs, exhibitions	2016 - 2015
EU28		29	▼ 1	26	▲ 3	24	▲ 2
BE		46	▲ 13	28	▲ 10	25	▲ 2
BG		37	▲ 9	20	▼ 3	16	=
CZ		28	▲ 5	18	=	33	▲ 9
DK		19	▼ 5	21	▲ 8	30	▲ 16
DE		25	▲ 7	23	▲ 9	22	▼ 3
EE		29	▼ 15	16	▲ 9	24	▼ 8
IE		29	▼ 8	20	▼ 16	32	▲ 3
EL		26	▲ 5	33	▲ 4	36	▲ 7
ES		34	▼ 1	28	▼ 2	25	▲ 8
FR		35	▼ 7	24	▲ 9	22	▲ 4
HR		23	▼ 6	21	▲ 2	26	▼ 11
IT		25	▼ 3	34	▼ 4	16	▼ 3
CY		22	▼ 1	23	▼ 5	32	▲ 2
LV		24	▼ 5	21	▲ 6	36	▲ 5
LT		23	▼ 2	19	▲ 5	25	=
LU		44	▲ 4	12	▼ 8	20	▲ 7
HU		29	▲ 9	28	▲ 11	18	▼ 9
MT		34	▼ 9	12	▼ 14	48	▲ 12
NL		28	▼ 2	27	▼ 5	19	▼ 6
AT		26	▼ 4	17	▼ 3	25	▼ 1
PL		24	▲ 3	20	▲ 3	31	▼ 1
PT		34	▼ 8	23	▼ 4	24	▼ 3
RO		41	▲ 6	20	▲ 1	23	▲ 5
SI		17	▼ 1	18	▲ 1	26	▼ 1
SK		29	▲ 5	17	▲ 2	19	▼ 5
FI		28	▼ 1	24	▼ 7	34	▼ 1
SE		24	▼ 3	16	▲ 1	21	▼ 4
UK		25	▼ 12	32	▲ 6	31	▲ 4
CH		20	▲ 6	20	▲ 9	26	▲ 6
US		30	▼ 13	25	▼ 2	20	=

Base: Companies that have introduced innovative goods or services since January 2013 (n = 7329), 56% of base

February 2016

Company characteristics

- Larger companies with 250+ employees are more likely to think public support for **training staff in how to promote and market innovative goods or services** would make a positive impact than smaller companies (40% vs. 28%). Similarly, **meeting regulations or standards** is more likely to be mentioned by larger companies (27% vs. 18%). Smaller companies with employees 1-9 are more likely to think support for **accessing or reinforcing online selling** (27% vs. 18-22%) and **participating in conferences, trade fairs, exhibitions** (24% vs. 13-25%) would make a positive impact than larger companies.
- Retail sector companies are more likely to think public support for **accessing or reinforcing online selling** would make a positive impact than companies in other sectors (34% vs. 19-22%). Retail and services sector companies are more likely to think public support for **training staff in how to promote and market innovative goods or services** would make a positive impact than manufacturing and industry sector companies (30-31% vs. 22-26%). Industry businesses more likely than businesses from other sectors to say **meeting regulations or standards** would have a positive impact (25% vs. 15-20%). Manufacturing companies are more likely to think that support for **accessing and reinforcing presence in export** than companies from other sectors (28% vs. 8-15%).
- Companies established between 2010 and 2015 are more likely to think support for **participating in conferences, trade fairs, exhibitions** would provide most impact than companies established before 2010 or after 2015 (32% vs. 22-25%). Younger companies are more likely to say support for **accessing or reinforcing online selling** would have a positive impact compared to older companies (46% vs 25-26%).
- Companies with a rising turnover are more likely to say support for **participating in conferences, trade fairs and exhibitions** (28% vs. 19%) and **training of staff to promote and market innovative goods or services** (32% vs. 24%) compared to companies with a falling turnover. The latter are more likely to think support for **accessing or reinforcing online selling** would make a positive impact than companies with a rising turnover (28% vs. 21%).

Q6A Thinking about possible public support for commercialisation of your innovative goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS)

(% - EU)

	Training staff in how to promote and market innovative goods or services	Accessing or reinforcing online selling	Participating in conferences, trade fairs, exhibitions	Meeting regulations or standards	Accessing or reinforcing your presence in export
EU28	29	26	24	19	14
Company size					
1-9	28	27	24	18	13
10-49	35	22	25	21	19
50-249	34	18	23	25	20
250+	40	21	13	27	19
Sectors grouped (NACE)					
Manufacturing (C)	22	22	24	17	28
Retail (G)	30	34	25	15	11
Services (H/I/J/K/L/M/N/R)	31	20	23	20	15
Industry (D/E/F)	26	19	26	25	8
Company age					
Before 2010	29	25	22	19	14
Between 2010 and 2015	28	26	32	16	14
After 2015	25	46	25	10	10
Company's turnover since 2013					
Risen by 5% or more	32	21	28	20	18
Remained approx. the same	30	27	24	18	10
Fallen by 5% or more	24	28	19	18	14

4 Public support for the commercialisation of goods and services for companies that have not introduced any innovations

Similar to the previous question, non-innovative companies think training staff in how to promote and market innovative goods or services would have the most positive impact on their company.

Companies that have not introduced any innovative goods or services since January 2013 were asked a similar question about the commercialization of their non-innovative goods or services. They were asked to think about which types of intervention would have the most positive impact on their companies¹¹. The results below are compared with the last survey results conducted in 2015.

Generally, the non-innovative businesses are less likely mention all of these types of interventions as being able to make a positive impact on their companies. It is also interesting to see a large proportion of non-innovative companies say none of these interventions would have a positive impact on their business, compared with the proportion of innovative businesses (30% vs. 15%).

Similar to innovative companies, non-innovative companies also think intervention in the **training of staff to promote and market innovative goods or services** (21%, -3 pp) would have the most positive impact on their businesses, slightly less compared to the last survey.

The second most mentioned intervention by non-innovative businesses is **meeting regulations or standards** (18%, -2 pp).

Slightly less than a fifth of the non-innovative businesses think the public support of **accessing or reinforcing online selling** (18%, +1 pp) and **participating in conferences, trade fairs, exhibitions** (17%, +1 pp) would have the most positive impact.

Only 9% of companies think **accessing or reinforcing their presence in export markets** (-1 pp) would make a positive impact and 6% think public support for **market-testing a product** (+1 pp) or **service before launch** would make the most positive impact.

There have been only minimal changes between -3% and 2% across most interventions since the survey in 2015.

¹¹ Q6B. Thinking about possible public support for commercialisation of your goods or services, which of the following two types of intervention would have the most positive impact on your company? ANSWERS: Meeting regulations of standards; Accessing or reinforcing online selling; Participating in conferences, trade fairs, exhibitions; Training staff in how to promote and market innovative goods or services; Applying for, managing or protecting intellectual property rights; Market-testing a product or service before launch; Accessing or reinforcing your presence in export markets. Other; None; Don't know/not applicable.

Q6B Thinking about possible public support for commercialisation of your goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS)



Base: Companies that have not introduced innovative goods or services since January 2013 (n = 5783), 44% of base

Country analysis

US companies that have not introduced a good or service are less likely than companies in the EU to mention public support for **meeting regulations of standards** (12% vs. 18%) and for **accessing or reinforcing online selling** (11% vs. 18%) could make a positive impact on their business. US companies are less likely to support these two interventions since the last survey (-6 pp for meeting regulations of standards and -8 pp for accessing or reinforcing online selling).

Companies in Switzerland are also less likely than EU countries to mention **accessing or reinforcing online selling** (11% vs. 18%), **training staff** (17% vs. 21%), yet slightly more likely to mention **meeting regulations or standards** (21% vs. 18%).

In 19 EU countries, at least 20% of non-innovative companies think **training staff in how to promote and market goods or services** would have the most positive impact on their companies. Most likely to say so are companies in Malta (34%), Belgium (32%) and Spain (31%) while companies in Italy (11%) and Germany (13%) are least likely to share this view.

Meeting regulations or standards is most mentioned by almost one third of companies in France and Ireland (32% both) and Austria (30%) while just 6% of companies in Lithuania and Estonia and 7% in Portugal think this kind of intervention would have the most positive impact on their company.

For 10 EU countries, at least one fifth of companies say **accessing or reinforcing online selling** could have the most positive impact on their company with businesses in Cyprus and Greece (29% both) and France (28%) most likely to say this compared with businesses in Malta (0%) and just 5% of companies in the Czech Republic and Sweden.

Evolutions from 2015

Since the survey in 2015, there have been small movements at the EU level. The largest decline can be observed amongst companies supporting training staff in how to promote and market innovative goods or services (- 3 percentage points). Meeting regulations or standards (-2 pp) is also slightly less likely to be mentioned by companies compared with results from 2015.

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At a country level, there have been some notable changes since the last survey for **training staff in how to promote and market innovative goods or services**. Companies in Austria (+14 pp) and Malta (+13 pp) are more likely to say so since the last survey, while companies in Italy (-12 pp), Germany (-9 pp) and France (-8 pp) are less likely to think public support for this intervention would make the most positive impact on their business.

Compared to results in 2015, companies in Austria (+13 pp) more likely to say **meeting regulations or standards** would have the most positive impact, while companies in Luxembourg (-13 pp) and Malta (-9 pp) are less inclined to say so.

Accessing or reinforcing online selling is much more likely to be mentioned as having a positive impact by companies in Slovenia (+12 pp), Belgium (+10 pp) and France (+10 pp) compared with companies in Luxembourg (-10 pp), Estonia (-9 pp) and Malta (-9 pp).

Q6B Thinking about possible public support for commercialisation of your goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS) (%)

		Training staff in how to promote and market innovative goods or services	2016 - 2015	Meeting regulations or standards	2016 - 2015	Accessing or reinforcing online selling	2016 - 2015
EU28		21	▼ 3	18	▼ 2	18	▲ 1
BE		32	▲ 1	24	▲ 1	16	▲ 10
BG		19	▼ 3	11	▲ 2	12	=
CZ		25	▲ 9	18	▲ 3	5	▼ 6
DK		24	▲ 1	17	▲ 1	10	▼ 4
DE		13	▼ 9	23	▼ 1	21	▲ 4
EE		28	▲ 5	6	▲ 1	6	▼ 9
IE		25	▲ 3	32	▲ 7	20	▼ 1
EL		16	▼ 7	12	▲ 1	29	▲ 6
ES		31	▲ 2	19	▼ 7	11	▼ 15
FR		28	▼ 8	32	▼ 8	28	▲ 10
HR		22	▲ 9	17	▼ 1	26	▲ 7
IT		11	▼ 12	9	▼ 2	16	▼ 1
CY		18	▼ 4	12	▼ 2	29	▲ 9
LV		26	▲ 7	19	▲ 4	12	▲ 1
LT		25	▼ 3	6	▼ 3	10	▲ 3
LU		25	=	13	▼ 13	9	▼ 10
HU		22	▲ 5	13	▲ 1	21	▲ 5
MT		34	▲ 13	22	▼ 9	0	▼ 9
NL		20	▲ 6	19	▼ 6	23	▼ 3
AT		28	▲ 14	30	▲ 13	16	▼ 6
PL		18	▼ 2	16	▲ 6	20	▲ 4
PT		25	▼ 5	7	▼ 6	13	▼ 6
RO		22	▲ 7	10	▲ 2	14	▲ 8
SI		18	▲ 6	18	▲ 3	20	▲ 12
SK		20	▲ 2	15	▼ 1	10	=
FI		14	▼ 4	13	▼ 4	18	▼ 1
SE		18	▼ 6	15	▼ 7	5	▼ 2
UK		23	▲ 1	15	=	17	▲ 1
CH		17	=	21	▲ 7	11	▲ 1
US		24	▲ 2	12	▼ 6	11	▼ 8

Base: Companies that have not introduced innovative goods or services since January 2013 (n = 5783), 44% of base

Company characteristics:

- Larger companies with 50+ employees are more likely to say that public support for **training of staff in how to promote and market innovative goods or services** than than small companies (1-9 employees) (30% vs. 20%). Smaller companies are more likely to think public support for **accessing or reinforcing online selling** would make a positive impact to their businesses than larger companies with 50-249 employees (18% vs. 8%)
- Businesses from the retail sector are more likely to think **accessing or reinforcing online selling** is an intervention that would make a positive impact than businesses from other sectors (25% vs. 12-15%). Industry sector businesses are more likely to think public support for **meeting regulations or standards** would make a positive impact than manufacturing or retail companies (23% vs 13-15%). Service sector businesses are more likely to think **training staff in how to promote and market innovative goods or services** is a public support intervention that would make a positive impact on their business than businesses from other sectors (24% vs. 15-22%).

Q6B Thinking about possible public support for commercialisation of your goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS)

(% - EU)

	Meeting regulations or standards	Accessing or reinforcing online selling	Participating in conferences, trade fairs, exhibitions	Training staff in how to promote and market innovative goods or
EU28	18	18	17	21
Company size				
1-9	17	18	17	20
10-49	21	14	18	29
50-249	27	8	13	30
250+	13	5	31	36
Sectors grouped (NACE)				
Manufacturing (C)	15	13	24	15
Retail (G)	13	25	17	19
Services (H/I/J/K/L/M/N/R)	20	15	19	24
Industry (D/E/F)	23	12	9	22

III. INVESTMENT IN INNOVATION

This section analyses the proportion of turnover, companies have invested in innovation activities, and whether there are plans to change this level of investment over the next 12 months. It also addresses the planned focus areas for that investment in innovation whether it be in goods, services or other internal processes. There will also be an exploration of the reasons why companies decide to invest in innovation in the future.

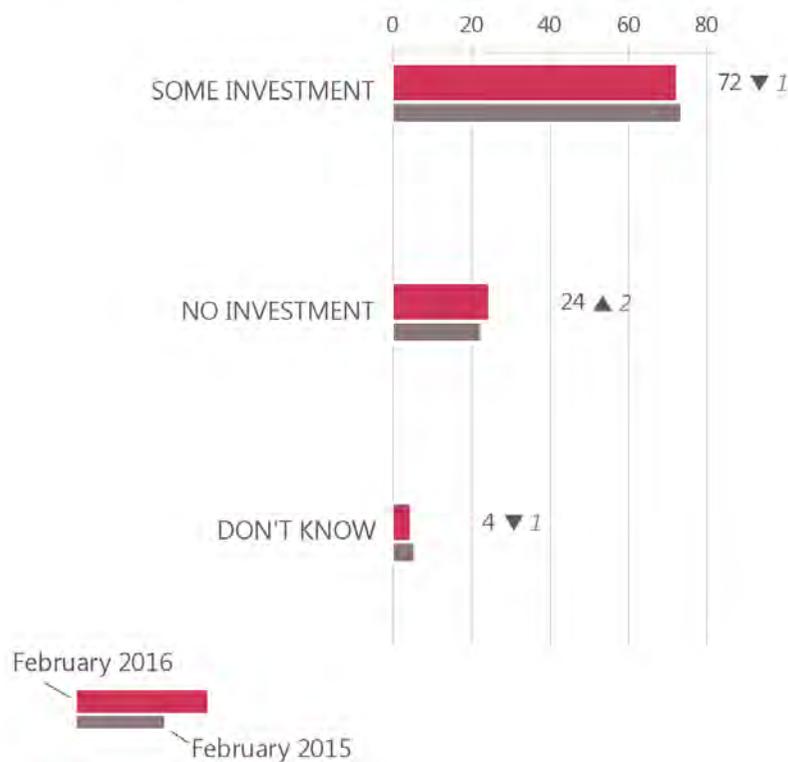
1 Investment in innovation in 2015

The relative majority of businesses invest between 1 and 5% of their turnover in innovation activities.

Companies that have introduced at least one innovation since January 2013, were asked to estimate the proportion of their company’s turnover in 2015 that was invested towards innovation activities¹².

Overall, more than seven out of ten businesses that have introduced at least one innovation have made some investment towards innovative activities (72%). There is little change from the results during the last survey (-1 pp).

Q7B Approximately what percentage of your company's turnover in 2015 was invested in innovation activities? (% - EU)



Base : Companies that have introduced innovation activities since January 2013 (n = 8726), 67% of base

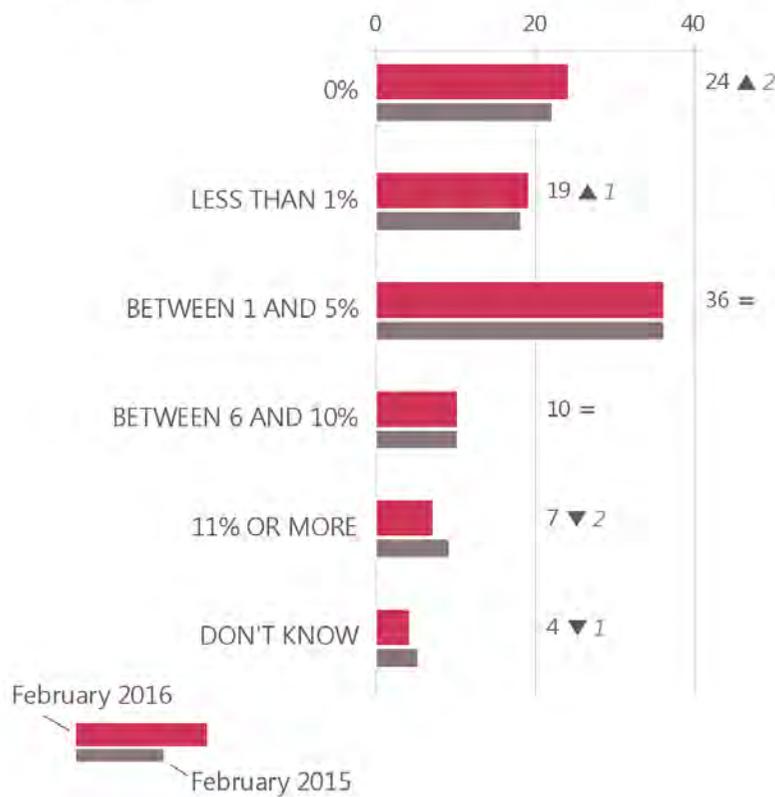
¹² Q7. Approximately what percentage of your company's turnover in 2015 was invested in innovation activities? ANSWER: 0%; Less than 1%; Between 1 and 5%; Between 6 and 10%; 11% or more; Don't know.

Less than a quarter of businesses invest 0% of their turnover, and this proportion has slightly increased since the last survey (24%, +2 percentage points). A further 19% of businesses invest less than 1% of their turnover in innovation activities (+1 pp).

At a more detailed level, more than one third of businesses (36%) invest between 1 and 5% of their turnover towards innovation activities. This remains unchanged since the last survey in 2015.

One in ten businesses invest between 6 and 10% of their turnover (10%, same as last survey) and a smaller proportion invest 11% or more of their turnover(7%), slightly less than during the last survey (-2 pp).

Q7 Approximately what percentage of your company's turnover in 2015 was invested in innovation activities? (% - EU)



Base : Companies that have introduced innovation activities since January 2013 (n = 8726), 67% of base

A country analysis shows that at least six in ten businesses in all countries have invested a proportion of their turnover towards innovation activities.

Across the EU, 72% of businesses have made some investment, whilst in the US almost two thirds of businesses (65%) have made some investment in innovation activities.

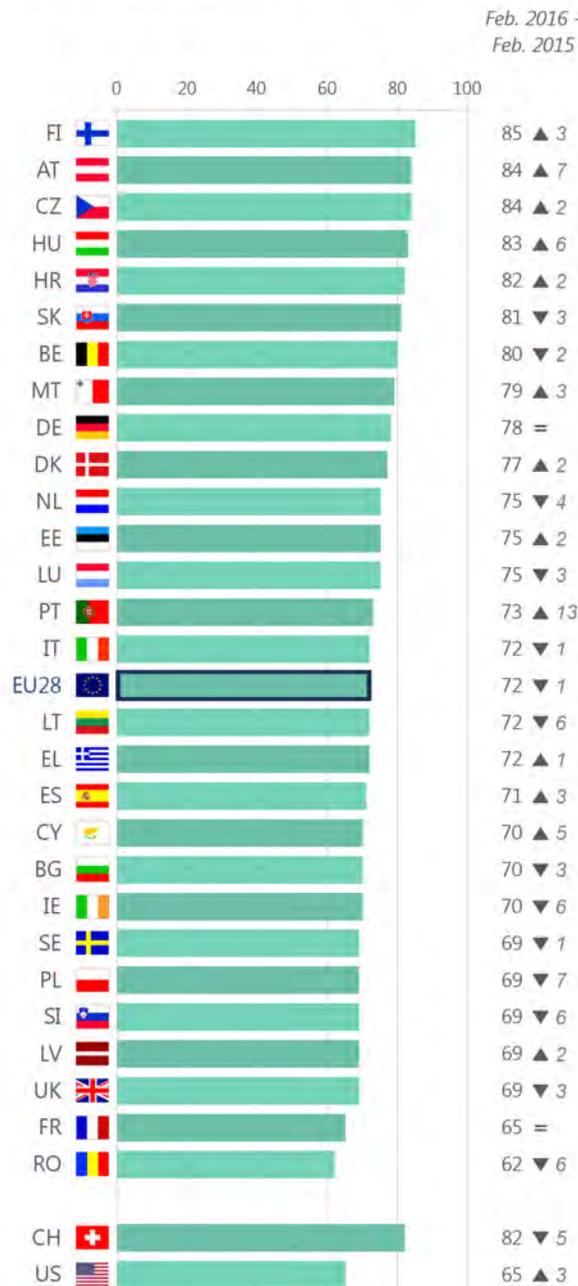
In Switzerland, businesses are more likely to have made some investment compared with the EU average (82% vs. 72%).

At an EU level, companies in Finland (85%), Austria and the Czech Republic (both 84%) are most likely to have made some investment towards innovation activities compared with Romania (62%), France (65%) and the United Kingdom (69%).

Evolutions since 2015

Overall, there has been little difference since 2015 for companies in the EU (-1 percentage points). For US companies, there is an increased likelihood that companies have put some investment towards innovation activities (+3 pp), whilst in Switzerland companies are less likely to have invested (-5 pp). Across EU countries, companies in Portugal (+13 pp), Austria (+7 pp) and Hungary (+6 pp) are much more likely to have made some investment in innovation activities than in 2015. Countries where companies are less likely to have made some investment include those in Poland (-7 pp), Lithuania, Ireland, Slovenia and Romania (all -6 pp).

Q7B Approximately what percentage of your company's turnover in 2015 was invested in innovation activities? (% - **SOME INVESTMENT**)



Base : Companies that have introduced innovation activities since January 2013 (n = 8726), 67% of base

At a company characteristic level:

- **Larger companies** with 250+ employees are more likely to have made some investment than **smaller companies** with 1-9 employees (81% vs. 71%).
- **Service sector** businesses are more likely than other sectors to made some investment into innovative activities (78% vs. 68%-71%).
- **Older companies** are more likely to have made some investment than companies established during 2015 (73% vs. 51%).
- **Companies with turnover of more than 2 million euros** in 2015 are more likely to have invested in innovation than those with lower turnover (81% vs. 67-76%)
- **Growing turnover businesses** by 5% or more are more likely to have invested during the past 12 months in innovation activities than declining or steady turnover businesses (80% vs. 65-72%).

Q7B Approximately what percentage of your company's turnover in 2015 was invested in innovation activities?
(% - EU)

	No investment	Some investment
EU28	24	72
Company size		
1-9	26	71
10-49	15	80
50-249	13	73
250+	10	81
Sectors grouped (NACE)		
Manufacturing (C)	27	71
Retail (G)	27	69
Services (H/I/J/K/L/M/N/R)	17	78
Industry (D/E/F)	31	68
Company age		
Before 2010	23	73
Between 2010 and 2015	25	73
After 2015	22	51
Company's turnover in 2015		
Up to 100 000 euros	29	67
More than 100 000 to 500 000 euros	25	74
More than 500 000 to 2 mil. euros	23	76
More than 2 mil. euros	15	81
Company's turnover since 2013		
Risen by 5% or more	18	80
Remained approx. the same	25	72
Fallen by 5% or more	33	65

2 Planned future investment in innovation

The majority of businesses plan to maintain or increase the level of investment in innovation over the next 12 months

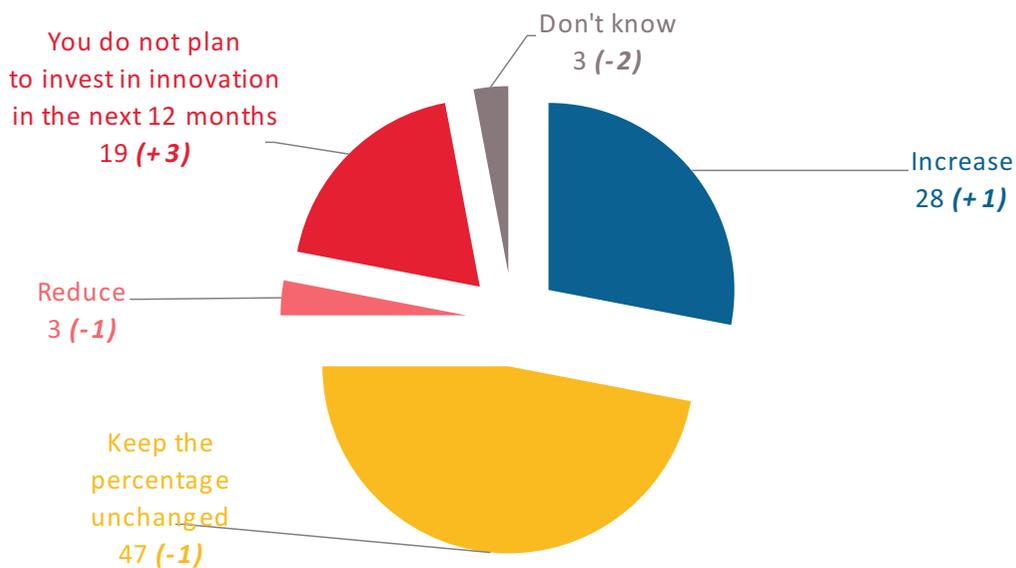
Companies that have introduced at least one innovation since January 2013, were asked what their plans were with regard to investing in innovation over the next 12 months¹³.

More than a quarter of businesses that have already introduced at least one innovation plan to increase the level of investment dedicated to innovation during the next 12 months (28%, +1 pp). This is slightly higher than results observed in the last survey.

Less than half of all businesses (47%, -1 pp) plan to keep the percentage unchanged while only 3% plan to reduce spend in this area across the next 12 months (-1 pp).

An increasing proportion of businesses, however, do not plan to invest in innovation during the next 12 months (19%, +3 pp).

Q8 Do you plan to increase, reduce or keep unchanged the percentage of investment dedicated to innovation in the next 12 months?
(% - EU)



(February 2016 - February 2015)

Base : Companies that have introduced innovation activities since January 2013 (n = 8726), 67% of base

¹³ Q8. Do you plan to increase, reduce or keep unchanged the percentage of investment dedicated to innovation in the next 12 months?
ANSWER: Increase, Reduce; Keep the percentage unchanged; You do Not plan to invest in innovation in the next 12 months; Don't know/Not applicable.

Country analysis

More than half of US businesses, will keep the percentage of investment unchanged (51%), whilst more than a quarter plan to increase investment dedicated to innovation (28%). These are similar proportions compared with the EU average (47% and 28% respectively). However, more than one in ten US businesses do not plan to invest in innovation over the next 12 months (12%) which is lower than the EU average (19%).

At least two thirds of businesses in Switzerland are planning to keep the percentage of investment dedicated to innovation unchanged and they are much more likely to do so in comparison with their EU counterparts (67% vs. 47%). Slightly less than a quarter of businesses in Switzerland plan to increase their levels of investment (24%), which is less than the EU average (28%). Only 4% of companies in Switzerland do not plan to invest in innovation over the next 12 months compared with 19% of EU companies.

Within the EU, businesses in Romania (51%), Malta (47%) and Ireland (43%) are more likely to say they plan to **increase** their level of investment in innovation during the next 12 months, compared with 17% of businesses in France and 20% of companies in each of Austria, Estonia and Luxembourg.

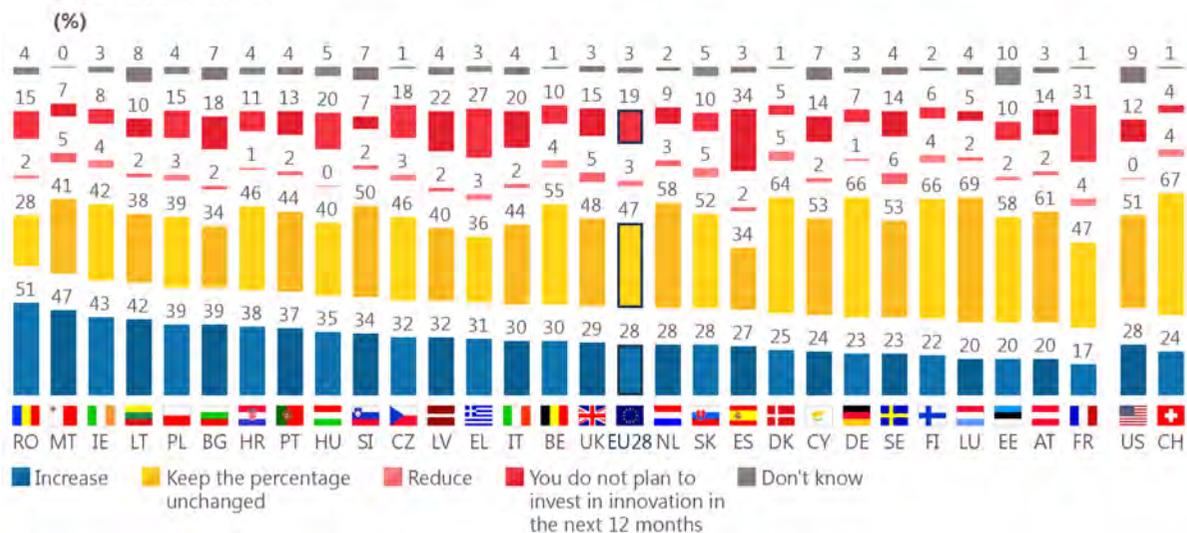
The absolute majority of businesses in 11 out of 28 EU countries plan to keep investment **unchanged** over the next 12 months. Two thirds or more of businesses in Luxembourg (69%), Finland (66%) and Germany (66%) plan to keep the investment in innovation unchanged over the next 12 months compared with 28% of businesses in Romania and slightly more than a third of all businesses in Bulgaria (34%) and Spain (34%).

For six of the 28 EU countries, one in five or more businesses **do not plan to invest** in innovation at all during the next 12 months. Businesses in Spain (34%), France (31%) and Greece (27%) are more likely to say they will not be investing in innovation in the coming 12 months, compared with 5% of businesses in Luxembourg and Denmark.

A very small percentage of businesses in each EU country plan to reduce investment over the next 12 months. The highest proportion can be observed in Sweden (6%).

One in ten businesses in Estonia (10%) don't know what they will do with regards to investment dedicated to innovation.

Q8 Do you plan to increase, reduce or keep unchanged the percentage of investment dedicated to innovation in the next 12 months?



Base: Companies that have introduced innovation activities since January 2013 (n = 8726), 67% of base

February 2016

Evolutions since 2015

Compared with the results from 2015, there is little change from the last survey for the EU with the exception of an increase in the proportion of businesses that don't plan at all to invest in innovation (+3 pp).

Businesses in the US have similar views with regards to investment towards innovation in comparison with the last survey. They are slightly less likely to keep the percentage unchanged (-2 pp) and slightly more likely to plan not to invest over the next 12 months (+2 pp).

Since the last survey, businesses in Switzerland are more likely to increase their level of investment dedicated to innovation (+10 percentage points), while the proportion of businesses planning to keep the percentage unchanged has declined by seven percentage points.

Amongst the EU countries, businesses in Lithuania (+16 pp) are more likely to **increase** the percentage of investment dedicated to innovation. Other notable increases can be observed in Slovenia (+14 pp), Poland (+8 pp) and Portugal (+8 pp) since the last survey. At the other end of the scale, companies in Luxembourg and Estonia (both -7 pp) are less likely to increase the level of investment compared to the last survey.

Companies in Luxembourg (+17 pp), Estonia (+13 pp) and France (+11 pp) are much more likely to keep the percentage of investment dedicated to innovation **unchanged** compared to the last survey. Companies in Lithuania (-18 pp), Slovenia (-9 pp), the Netherlands (-8 pp) and Spain (-8 pp) are less likely to do so.

A proportion of companies in the United Kingdom and the Netherlands (both +7 pp) are now more likely to say they **don't plan to invest** in innovation in the next 12 months compared to the last survey in 2015, while companies in Luxembourg (-9 pp) and Estonia (-8 pp) are less likely to do so.

Q8 Do you plan to increase, reduce or keep unchanged the percentage of investment dedicated to innovation in the next 12 months?
(%)

		Increase	2016 - 2015	Keep the percentage unchanged	2016 - 2015	Reduce	2016 - 2015	You do not plan to invest in innovation in the next 12 months	2016 - 2015	Don't know
EU28		28	▲ 1	47	▼ 1	3	▼ 1	19	▲ 3	3
LT		42	▲ 16	38	▼ 18	2	=	10	=	8
SI		34	▲ 14	50	▼ 9	2	▼ 4	7	▼ 1	7
PL		39	▲ 8	39	▼ 4	3	▼ 1	15	▼ 1	4
PT		37	▲ 8	44	▼ 3	2	▼ 2	13	▼ 2	4
LV		32	▲ 6	40	▼ 4	2	▼ 3	22	▲ 1	4
NL		28	▲ 6	58	▼ 8	3	▼ 3	9	▲ 7	2
DE		23	▲ 4	66	▲ 6	1	▼ 4	7	▼ 4	3
BG		39	▲ 3	34	=	2	▼ 1	18	▼ 4	7
HU		35	▲ 3	40	▼ 4	0	=	20	▲ 3	5
EL		31	▲ 3	36	▼ 7	3	▲ 1	27	▲ 5	3
BE		30	▲ 3	55	▼ 4	4	=	10	▲ 3	1
SK		28	▲ 3	52	▼ 5	5	▲ 1	10	▲ 3	5
RO		51	▲ 2	28	▲ 6	2	=	15	▼ 5	4
IE		43	▲ 2	42	▼ 1	4	▲ 2	8	▼ 2	3
FI		22	▲ 1	66	▼ 1	4	▼ 4	6	▲ 4	2
MT		47	=	41	▲ 1	5	▲ 1	7	▼ 2	0
HR		38	=	46	▼ 5	1	▼ 1	11	▲ 4	4
CZ		32	=	46	▼ 3	3	=	18	▲ 3	1
ES		27	=	34	▼ 8	2	▲ 1	34	▲ 6	3
DK		25	▼ 1	64	▲ 1	5	▲ 1	5	▲ 2	1
AT		20	▼ 1	61	▲ 3	2	▼ 1	14	▲ 4	3
FR		17	▼ 1	47	▲ 11	4	▼ 4	31	▼ 6	1
IT		30	▼ 2	44	▲ 2	2	=	20	▲ 6	4
UK		29	▼ 2	48	▼ 3	5	▲ 2	15	▲ 7	3
CY		24	▼ 3	53	▲ 8	2	=	14	▼ 3	7
SE		23	▼ 5	53	▲ 2	6	▲ 2	14	=	4
EE		20	▼ 7	58	▲ 13	2	▲ 2	10	▼ 8	10
LU		20	▼ 7	69	▲ 17	2	▼ 1	5	▼ 9	4
CH		24	▲ 10	67	▼ 7	4	▼ 1	4	=	1
US		28	▲ 1	51	▼ 2	0	▼ 2	12	▲ 2	9

Base: Companies that have introduced innovation activities since January 2013 (n = 8726, 67% of base)

An analysis of company characteristics reveals:

- **Larger companies** with 250+ employees are more likely to be considering to increase their investment in the next 12 months (40% vs. 25-32%). **Mid-sized companies** with employees 50-249 are more likely to keep the percentage of investment in innovation unchanged (56% vs. 40-50%). **Smaller companies** with 1-9 employees are more likely than larger companies not to invest in innovation over the next 12 months (20% vs. 8%)
- Companies in the **manufacturing sector** are slightly more likely than industry (33% vs. 27%) to increase their level of investment.
- **Companies established after 2015** are more likely than older companies to increase the percentage of investment into innovation (56% vs. 34-27%)
- **Growing companies** with turnover rising by 5% or more are more likely to increase their percentage of investment into innovation in the next 12 months compared to companies with falling revenues (33% vs. 22%).
- Companies that approach **design as their central element** are more likely to increase their investment into innovation versus those that do not use design at all (36% vs. 26%).

Q8 Do you plan to increase, reduce or keep unchanged the percentage of investment dedicated to innovation in the next 12 months?
(% - EU)

	Increase	Reduce	Keep the percentage unchanged	You do not plan to invest in innovation in the next 12 months
EU28	28	3	47	19
Company size				
1-9	28	3	46	20
10-49	32	2	50	13
50-249	25	2	56	11
250+	40	8	40	8
Sectors grouped (NACE)				
Manufacturing (C)	33	1	45	17
Retail (G)	29	2	44	22
Services (H/I/J/K/L/M/N/R)	28	4	49	16
Industry (D/E/F)	27	2	48	21
Company age				
Before 2010	27	3	47	20
Between 2010 and 2015	34	3	45	15
After 2015	56	1	24	13
Company's turnover since 2013				
Risen by 5% or more	33	3	49	13
Remained approx. the same	27	2	48	20
Fallen by 5% or more	22	4	46	25
Company's approach to design				
Central element	36	3	43	15
Integral but not central	27	2	51	15
Used as last finish	29	5	51	13
Not systematically used	27	2	49	20
Not used	26	2	41	28

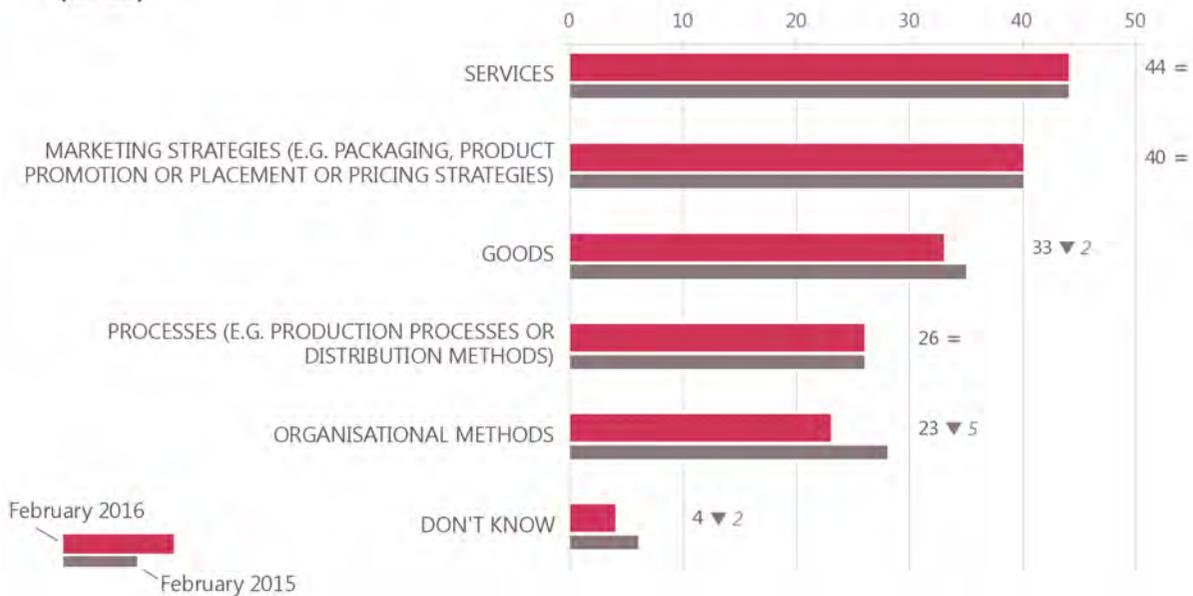
A majority of businesses will be investing in services and/or marketing strategies in the next 12 months.

Companies that have already invested in innovative activities, were asked about the focus of their planned investment in innovation in the coming 12 months¹⁴.

At least four in ten businesses will be focusing their investment on innovative services (44%) and marketing strategies (40%). Both proportions remain unchanged since the last survey. A third of companies will be focusing their investment towards innovative goods (33%, -2 pp) over the next 12 months while more than a quarter of businesses will focus their investments on processes (26%, same as in 2015).

The proportion of companies planning to focus their investment on organisational methods has declined by five percentage points since the last survey (23%).

Q9 What will be the focus of your planned investment in innovation in the next 12 months?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base : Companies that have invested and plans to invest in the next 12 months (n = 6400, 49% of base)

¹⁴ Q9. What will be the focus of your planned investment in innovation in the next 12 months? ANSWERS: Goods; Services; Processes (eg. Production processes or distribution methods); Marketing strategies (eg. Packaging, product promotion or placement or pricing strategies); Organisational methods; Don't know/not applicable.

Country analysis

Companies that have already invested in innovation in the US, are much more likely to be focusing their investment on any areas compared to those within the EU. For example, 72% of companies in the US will be focusing their investment on services, compared with only 44% of companies across the EU.

On the other side of the scale, companies in Switzerland are less likely to be focusing their investment on any of these areas compared to companies within the EU. The largest gaps can be observed for investments in services (31% vs. an EU average of 44%) and goods (20% vs. an EU average of 33%).

In 16 EU Member States, companies that have invested in innovation and plan to invest in the next 12 months are more likely to say their focus will be on **services** than on any other areas. This is particularly the case for companies in Finland (67%), Slovakia (60%) and Luxembourg (56%). This compares with the lowest proportions of companies focusing their investments on this area in Denmark (29%), Slovenia and Cyprus (both 30%). In the Czech Republic (47%) and in Portugal (42%), companies are as likely to plan to focus on services as they are on marketing strategies.

In nine EU countries, the majority of companies say they will focus their planned investment on **marketing strategies**. Companies in the United Kingdom (61%) and Ireland (51%) are most likely to be focusing their investments on marketing activities, whilst less than a third of companies in Slovenia (30%) and Croatia (31%) plan to focus on marketing activities.

Around one third of all EU companies plan to focus their investment in **goods** (33%), with the highest proportion of companies planning to do so from within Finland (57%), followed by Belgium (49%) and France (43%). This compares with less than a fifth of companies within Ireland (15%) and 20% of businesses in Spain.

Around one quarter of all companies in EU countries (26%), plan to focus their investment in innovation on **processes** over the next 12 months. Companies in the Czech Republic (43%) and Latvia (42%) are more likely to do so than Portugal (13%) or Sweden (14%).

Finally, less than a quarter of all companies in the EU (23%) plan to focus their investments in **organizational methods** in the next 12 months. Companies in the United Kingdom (36%) and Belgium (36%) are more likely to focus their planning on this area, than companies in Estonia and Malta (both 12%).

Evolutions since 2015

There has been little change at the EU level across all of the areas of planned investment since the last survey in 2015 with the exception of organizational methods (-5 pp).

Companies in the US are much more likely than they were 12 months ago, to be focusing their planned investment in innovation across all areas; services (+40 percentage points), marketing strategies (+37 pp), goods (+30 pp), processes (+31 pp) and organizational methods (+33 pp). Such large changes in opinion by businesses are not observed in any other country.

In Switzerland, companies are less likely to be planning investment in services (-14 pp) and goods (-11 pp), yet there is little change for marketing strategies (+1 pp), processes (-1) and organizational methods (same as in 2015). However, a higher proportion of companies did respond with “don’t know” since the last survey (+8 pp).

Companies in Finland (+17 pp), France (+16 pp) and Bulgaria (+11) are more likely to be planning investment in **services**, compared to the last survey. This is in contrast to companies in Cyprus (-22 pp), Spain (-18 pp), Malta (-14 pp) and Denmark (-10 pp) where they are less likely say they will focus their investment in services, compared to 2015.

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In Spain, there has been an eleven percentage point decrease in the proportion of companies planning to invest in **marketing strategies** since the last survey. On the other hand, there have been five or more percentage point increases in the proportions of companies planning to invest in marketing strategies in seven countries since the last survey. Companies in Lithuania have the highest increase (+12 pp) followed by Austria (+9 pp).

There are large differences, since the last survey in 2015, for planned investment in the innovation of **goods** for companies that have already invested. Countries with the largest declines in the proportion of companies planning to invest in goods since the last survey, include Greece (-20 pp), Ireland (-15 pp), Malta (-14 pp) and Germany (-13 pp). Companies in Estonia (+16 pp), Romania (+15 pp), Lithuania (+12 pp) and the Netherlands (+10 pp) are much more likely than in 2015 to be planning investment in goods over the next 12 months.

Whilst there is no change at the EU level since 2015 for companies planning to invest in **processes**, in 15 individual EU countries there have been changes of 5 percentage points or more since the last survey. Companies in Malta (+10 pp) and Austria (+10 pp) are more likely to invest in processes compared to 12 months ago. This compares to companies in Luxembourg (-15 pp), Cyprus (-13 pp), Belgium (-13 pp) and Portugal (-10 pp) that are less likely to plan their innovation investments around processes in the next 12 months.

Companies in 19 EU countries in fact are less likely to plan to invest in **organizational methods** innovations during the coming 12 months. In particular, companies in Luxembourg (-21 pp), Spain (-17 pp), Cyprus (-16 pp) are less likely to focus on organizational methods for their investments in innovation, compared with a greater proportion of companies in Lithuania (+12 pp), Romania (+8 pp) and Ireland (+7 pp).

Q9 What will be the focus of your planned investment in innovation in the next 12 months?
(MULTIPLE ANSWERS POSSIBLE)
(%)

		Services	2016 - 2015	Marketing strategies (e.g. packaging, product promotion or placement or pricing strategies)	2016 - 2015	Goods	2016 - 2015	Processes (e.g. production processes or distribution methods)	2016 - 2015	Organisational methods	2016 - 2015	Don't know
EU28		44	=	40	=	33	▼ 2	26	=	23	▼ 5	4
BE		43	▲ 4	39	▲ 1	49	▲ 5	25	▼ 13	36	▼ 1	6
BG		40	▲ 11	36	▲ 1	26	▲ 7	17	▲ 1	22	▼ 2	3
CZ		47	▼ 3	47	▲ 3	37	▲ 9	43	▲ 4	19	▼ 13	3
DK		29	▼ 10	42	▲ 5	27	▼ 9	23	▼ 3	13	▼ 3	5
DE		37	▼ 4	39	▲ 4	28	▼ 13	32	▲ 7	18	▼ 6	6
EE		40	▲ 7	33	▲ 6	37	▲ 16	32	▼ 2	12	▼ 14	4
IE		31	▼ 4	51	▼ 3	15	▼ 15	21	▼ 1	28	▲ 7	7
EL		35	▲ 6	42	▲ 8	21	▼ 20	30	▲ 3	25	▼ 5	1
ES		42	▼ 18	41	▼ 11	20	▼ 10	30	▼ 6	24	▼ 17	2
FR		45	▲ 16	37	▼ 2	43	▼ 2	26	▲ 6	35	=	2
HR		42	▲ 7	31	▼ 2	22	▼ 3	19	▼ 7	28	▲ 4	6
IT		43	▲ 6	35	▲ 2	35	▼ 1	18	▲ 3	19	▼ 4	3
CY		30	▼ 22	42	▼ 5	32	▼ 6	15	▼ 13	13	▼ 16	2
LV		51	▲ 4	38	▲ 2	31	▲ 3	42	▲ 4	27	▼ 6	2
LT		45	▼ 1	36	▲ 12	36	▲ 12	30	▼ 1	27	▲ 12	6
LU		56	▼ 2	36	=	40	▼ 1	23	▼ 15	23	▼ 21	3
HU		48	▲ 9	38	▼ 2	42	▼ 1	15	▲ 3	14	▼ 8	6
MT		38	▼ 14	49	▲ 7	26	▼ 14	34	▲ 10	12	▼ 14	3
NL		47	▲ 4	38	▼ 5	41	▲ 10	30	▼ 1	22	▼ 8	4
AT		38	=	47	▲ 9	25	▲ 6	32	▲ 10	17	▼ 7	4
PL		53	▲ 3	36	▲ 2	25	▼ 8	27	▲ 1	21	▲ 1	5
PT		42	=	42	▲ 5	26	▼ 7	13	▼ 10	15	▼ 12	6
RO		46	▲ 5	42	▲ 4	39	▲ 15	20	▲ 9	26	▲ 8	3
SI		30	▼ 6	39	▲ 6	30	▼ 9	18	▼ 2	15	▼ 2	5
SK		60	▲ 7	30	▼ 2	23	▼ 3	20	▼ 5	14	▲ 1	3
FI		67	▲ 17	57	▲ 8	57	▲ 6	31	▲ 7	24	▲ 5	0
SE		42	▼ 4	36	▲ 5	32	▲ 4	14	▼ 9	14	▲ 3	13
UK		54	▼ 3	61	=	42	▲ 1	31	▼ 5	36	▼ 12	5
CH		31	▼ 14	34	▲ 1	20	▼ 11	22	▼ 1	13	=	17
US		72	▲ 40	69	▲ 37	50	▲ 30	51	▲ 31	51	▲ 33	4

Base: Companies that have invested and plans to invest in the next 12 months (n = 6400, 49% of base)

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Company characteristics

- Larger companies (250+ employees) are more likely to focus their investment in the next 12 months on **services** compared with smaller companies (60% vs. 39-44%). Large (250+ employees) and mid-sized companies (50-249 employees) are more likely to plan investing in **organizational methods** than smaller companies (32% vs. 22-26%). Mid-sized companies (50-249 employees) are more likely to focus their investment on innovative **processes** compared to smaller and even larger companies (46% vs. 24-34%).
- Unsurprisingly, companies in the services sector are more likely to focus their investment into **services** compared with manufacturing companies (53% vs. 27%). In addition, they are more likely to focus on **organizational methods** compared with manufacturing companies (25% vs. 15%). Companies in the manufacturing sector are more likely to focus their investment in the innovation of **goods**, compared with companies within the industry sector (43% vs. 35%). Manufacturing companies (40%) are also more likely to focus their investments on innovating **processes** compared with retail (22%), industry (23%) or companies from the services (27%) sectors. Retail companies are more likely to focus their investments on **marketing strategies** than other sectors (45% vs. 30-41%).
- Companies with high turnover in 2015 (more than 2 million euros) are more likely than those with low turnover (up to 100.000 euros) to plan investing in **processes** (38% vs. 24%) and **organisational methods** (33% vs. 22%).
- Companies with rising turnover (5% or more) are more likely to focus their planned investments on **services**, compared with companies with falling revenues (46% vs 39%). These growing companies are also more likely to plan to invest in **processes** (30% vs. 19%) than shrinking companies.
- Companies that consider design as a central element are more likely than those that do not use design to plan to invest in **marketing strategies** (48% vs. 30%).

Q9 What will be the focus of your planned investment in innovation in the next 12 months? (MULTIPLE ANSWERS POSSIBLE)

	Goods	Services	Processes (e.g. production processes or distribution methods)	Marketing strategies (e.g. packaging, product promotion or placement or pricing strategies)	Organisational methods
EU28	33	44	26	40	23
Company size					
1-9	34	44	24	40	22
10-49	27	43	34	41	26
50-249	34	39	46	38	32
250+	35	60	34	37	32
Sectors grouped (NACE)					
Manufacturing (C)	43	27	40	31	15
Retail (G)	39	37	22	45	23
Services (H/I/J/K/L/M/N/R)	26	53	27	41	25
Industry (D/E/F)	35	47	23	30	23
Company age					
Before 2010	33	43	26	40	22
Between 2010 and 2015	35	48	26	41	26
After 2015	40	45	12	49	30
Company's turnover in 2015					
Up to 100 000 euros	30	46	24	38	22
More than 100 000 to 500 000 euros	33	47	27	44	20
More than 500 000 to 2 mil. euros	36	43	26	39	26
More than 2 mil. euros	38	41	38	40	33
Company's turnover since 2013					
Risen by 5% or more	33	46	30	44	25
Remained approx. the same	31	44	27	36	23
Fallen by 5% or more	35	39	19	40	20
Company's approach to design					
Central element	33	43	24	48	22
Integral but not central	32	44	29	45	24
Used as last finish	36	44	24	47	22
Not systematically used	29	43	25	32	25
Not used	34	46	26	30	22

3 Reasons to invest in innovation

Two main reasons for investing in innovation are to capitalize on market potential and due to customer request.

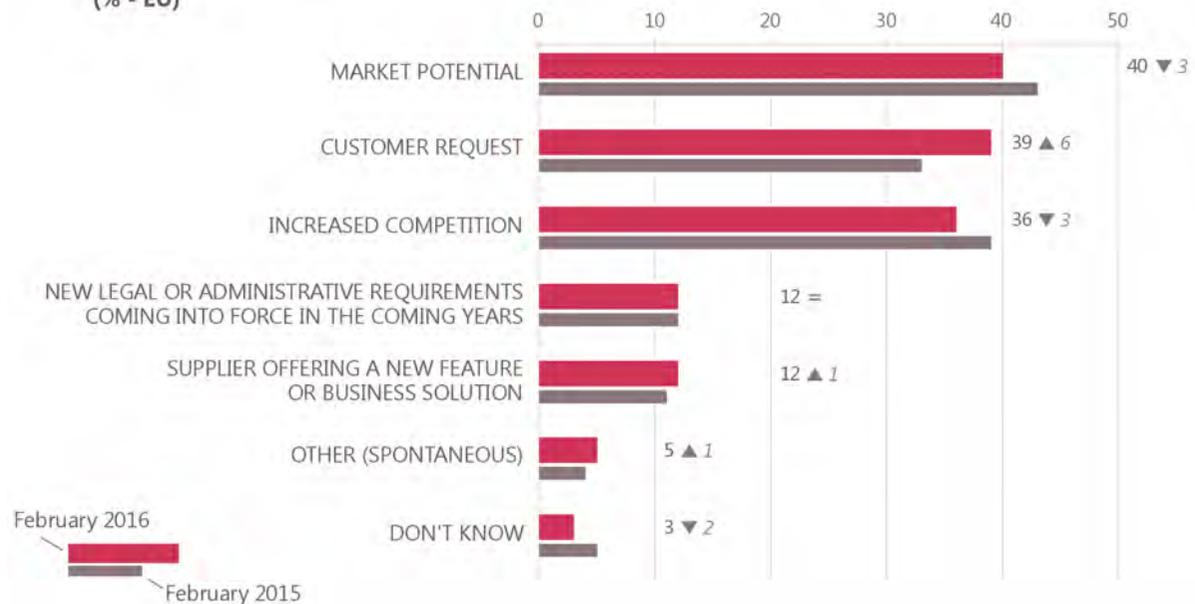
Companies that have invested in innovation were asked to nominate their two main reasons for choosing to invest in innovation over the next 12 months¹⁵.

Overall there are three main reasons most mentioned by companies. Around four in ten companies say their reasons for deciding to invest in innovation are to meet **market potential** (40%) and due to **customer request** (39%). More than two thirds of companies also mentioned **increased competition** (36%) as one of their main reasons for deciding to invest in innovation over the next 12 months.

Slightly more than one in ten companies are investing because new **legal or administrative requirements** coming into force in coming years are requiring them to do so (12%) and a similar proportion mention their reason to be due to **a supplier offering a new feature or business solution** (12%).

Since the last survey in 2015, there is an increasing proportion of companies deciding to invest as a response to customer requests (+ 6 percentage points), whilst slightly less have decided to invest due to market potential (- 3 pp) and increased competition (-3 pp).

Q10A What are the two main reasons why your company decided to invest in innovation in the next 12 months? (MAX. 2 ANSWERS) (% - EU)



Base : Companies that have invested and plans to invest in the next 12 months (n = 6400, 49% of base)

¹⁵ Q10A. What are the two main reasons why your company decided to invest in innovation in the next 12 months? ANSWERS: Market potential; Customer request; Increased competition; Supplier offering a new feature or business solution; New legal or administrative requirements coming into force in the coming years; Other; Don't know/non applicable.

Country Analysis

Companies in the US mention the same top three reasons for deciding to invest as those in the EU, however US companies are more likely to mention market potential as their main reason than those in the EU (58% vs. 40%). They are also more likely than EU companies to mention a supplier offering a new feature or business solution (19% vs. 12%) as a reason for deciding to invest innovation. On the other hand, US companies are less likely to say they are deciding to invest due to customer requests (33% vs. 39%), increased competition (30% vs. 36%) and as a result of new legal or administrative requirements coming into force (7% vs. 12%).

In Switzerland, the three most often mentioned reasons as to why companies decide to invest are the same as those mentioned by their EU counterparts. However, companies in Switzerland are less likely than EU countries to mention increased competition (31% vs. 36%), new legal or administrative requirements (7% vs. 12%) and a supplier offering a new feature or business solution (6% vs. 12%). Companies in Switzerland are slightly more likely to say market potential compelled them to invest than EU companies (42% vs. 40%).

Across the EU, **market potential** is the most mentioned reason for deciding to invest in innovation in 14 countries. Companies in the Netherlands (58%), Greece (57%) and Malta (56%) are most likely to say this is their reason for deciding to investment in innovation, compared to slightly more than a quarter of companies in Italy, Luxembourg and Poland (all 26%).

In seven EU countries, **customer request** is the most mentioned reason why companies decided to invest in innovation over the next 12 months. More than half of companies in France (60%) and the Czech Republic (51%) have this view, compared to more than one in ten companies in Greece (12%) and Bulgaria (15%). In Sweden, companies are as likely to mention market potential as they are to mention customer request (both 38%).

Along with four other EU countries, companies in Poland (61%) and Hungary (55%) are most likely to mention **increased competition** as their reason for deciding to invest in innovation over the next 12 months. This compares with companies in the Netherlands (23%), Sweden (25%) and Italy (27%) that are least likely to mention this as a main reason for further investment.

New legal or administration requirements coming into force in the coming years is not the most mentioned reason in any of the EU countries. Companies in Belgium (23%), Poland (20%) and the Netherlands (19%) are more likely to mention this as a reason, compared with companies in Slovenia (3%), Denmark (3%) and Italy (6%).

Similarly, **supplier offering a new feature or business solution** is not the most mentioned reason in any country. At least one in five companies in the United Kingdom (23%) and Luxembourg (20%) say this is one reason for deciding to invest in innovation, compared with very small proportions of companies in Cyprus (3%), Germany (4%) and Estonia (5%).

Evolutions since 2015

Compared with 2015, EU companies are more likely to say customer request (+6 percentage points) and slightly more likely to mention a supplier offering a new feature or business solution (+1 pp) as main reasons for deciding to invest in innovation, but less likely to say market potential and increased competition (both -3 pp). The proportion of companies who say their reason for investing is due to new legal or administrative requirements coming into force remains unchanged.

Since 2015, companies in the US are much more likely to mention the market potential as one of the main reasons (+30 pp) for deciding to invest in innovation. There is also an increase in the proportion of companies to say increased competition (+13 pp) and customer request (+9 pp) as reasons for investing in innovation.

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Since the last survey, companies in Switzerland are less likely to say customer request or increased competition (both -6 pp) are the main reasons for investing in innovation. Similarly, companies are slightly less likely to list market potential and new legal or administrative requirements (both -3 pp).

Turning to the EU, companies in the United Kingdom (-17 pp), Sweden (-11 pp), Romania (-8 pp) and the Netherlands (-8 pp) are less likely to say **market potential** is a main reason for deciding to invest, compared with businesses in Lithuania (+16 pp) and Austria (+11 pp), that are more likely to mention this.

Companies in Spain (+18 pp), Czech Republic (+17 pp) and Hungary (+12 pp) are much more likely than in 2015, to consider **customer request** as one of their main reasons for deciding to invest in innovation. By contrast, companies in Greece (-13 pp) and Cyprus (-12 pp) are less likely to use this as a reason for deciding to invest in innovation during the next 12 months.

Increased competition is more likely to be mentioned as a reason for deciding to invest by companies in Denmark (+9 pp) and Hungary (+6 pp). The majority of companies in the EU are less likely to mention this as a reason to invest in innovation; the largest differences can be observed amongst companies in the Czech Republic (-17 pp), Malta (-14 pp), Luxembourg (-11 pp), Portugal (-11 pp) and Lithuania (-10 pp).

EU countries with the largest increase in the proportion of companies that are more likely to mention **new legal or administrative requirements** as a reason to invest include Latvia (+12 pp), Poland (+8 pp) and Malta (+6 pp), while companies in Hungary (-14 pp) are less likely to mention this reason compared with results from the last survey.

The largest increase in the proportion of companies mentioning a **supplier offering a new feature or business solution** can be observed in the United Kingdom (+12 pp), while businesses in Spain (-13 pp), Cyprus (-13 pp) and Finland (-9 pp) are less likely to do so.

Q10A What are the two main reasons why your company decided to invest in innovation in the next 12 months? (MAX. 2 ANSWERS)
(%)

		Market potential		Customer request		Increased competition		New legal or administrative requirements coming into force in the coming years		Supplier offering a new feature or business solution	
		2016 - 2015		2016 - 2015		2016 - 2015		2016 - 2015		2016 - 2015	
EU28		40	▼ 3	39	▲ 6	36	▼ 3	12	=	12	▲ 1
BE		47	▲ 7	38	▼ 3	29	▼ 5	23	▼ 1	16	▲ 8
BG		42	▲ 4	15	▼ 1	41	▲ 1	15	▲ 3	11	=
CZ		41	=	51	▲ 17	33	▼ 17	12	▼ 1	12	=
DK		52	▲ 4	31	▼ 4	34	▲ 9	3	▼ 3	11	▲ 1
DE		42	▼ 6	43	▲ 7	34	▲ 1	16	▼ 1	4	▼ 4
EE		39	▲ 8	25	▼ 1	40	▼ 3	7	▼ 1	5	=
IE		48	▼ 7	27	▲ 3	36	▲ 5	11	▼ 2	15	▲ 2
EL		57	=	12	▼ 13	44	▼ 2	7	▲ 2	9	▲ 4
ES		52	▼ 2	30	▲ 18	41	▼ 6	11	▼ 2	8	▼ 13
FR		36	▲ 2	60	▲ 4	35	▼ 8	17	▼ 6	12	▼ 1
HR		38	▼ 6	36	▼ 5	40	▲ 1	15	▲ 2	11	▲ 5
IT		26	▼ 4	37	=	27	▼ 7	6	▲ 1	15	▲ 8
CY		51	▲ 7	16	▼ 12	44	▼ 4	9	▼ 1	3	▼ 13
LV		41	▲ 4	40	▲ 1	33	▼ 5	17	▲ 12	14	▲ 3
LT		45	▲ 16	41	▲ 8	37	▼ 10	9	▼ 1	9	▲ 6
LU		26	▼ 7	42	▼ 7	31	▼ 11	15	▼ 2	20	▲ 7
HU		48	▲ 6	24	▲ 12	55	▲ 6	8	▼ 14	17	▲ 1
MT		56	▲ 7	26	▲ 6	35	▼ 14	15	▲ 6	9	▼ 7
NL		58	▼ 8	43	▲ 10	23	▼ 1	19	▼ 2	11	▲ 5
AT		53	▲ 11	34	▲ 5	34	▲ 1	12	▲ 1	9	▲ 3
PL		26	▼ 1	23	▼ 3	61	=	20	▲ 8	13	=
PT		33	▼ 6	32	▲ 7	40	▼ 11	11	▼ 1	16	=
RO		33	▼ 8	49	▲ 5	39	▲ 5	10	▲ 2	12	▲ 4
SI		37	▲ 9	32	▼ 5	38	▼ 3	3	▼ 5	9	▼ 1
SK		32	▲ 1	48	▲ 9	37	▼ 5	13	▲ 3	6	▼ 2
FI		49	▲ 2	30	▼ 9	40	▲ 1	14	▲ 1	11	▼ 9
SE		38	▼ 11	38	▲ 10	25	▼ 1	9	▲ 5	16	▲ 5
UK		46	▼ 17	43	▲ 11	40	▼ 3	8	▼ 6	23	▲ 12
CH		42	▼ 3	36	▼ 6	31	▼ 6	7	▼ 3	6	▲ 2
US		58	▲ 30	33	▲ 9	30	▲ 13	7	▼ 1	19	▲ 4

Base: Companies that have invested and plans to invest in the next 12 months (n = 6400, 49% of base)

Company characteristics

- Smaller companies (employees 1-9) are less likely to mention **market potential** as a main reason for deciding to invest in innovation compared with larger companies (38% vs. 46-51%).
- Larger companies (250+ employees) are more likely to respond to **customer request** for innovation than smaller companies (44% vs. 35-39%). Similarly, they are more likely to say **increased competition** is a reason for investing in innovation than smaller companies (57% vs. 35-43%).
- Industry (33%) and manufacturing (36%) companies are less likely than retail (40%) and services (41%) to say **market potential** is a reason for deciding to invest more.
- Companies in the retail sector (34%) are less likely to mention **customer request** as a reason than those in the services sector (43%).
- Industry sector companies are twice more likely than manufacturing to mention **new legal or administrative requirements** as a reason for deciding to invest in innovation over the next 12 months (16% vs. 8%).
- Newly established companies (after 2015) are more likely than older companies (before 2010) to mention market potential (58% vs. 37%) and increased competition (42% vs. 37%) as main reasons to invest in innovation.
- Companies with high turnover in 2015 (more than 2 million euros) are more likely to mention **market potential** than companies with lower turnover (52% vs. 37-43%).
- Companies with turnover rising by 5% or more are the most likely to mention **market potential** (48%) as their main reason for deciding to invest in the future. Companies with steady turnover are the most likely to mention **customer request** (45%), while falling turnover companies are most likely to decide to innovate because of **increased competition** (45%).

Q10a What are the two main reasons why your company decided to invest in innovation in the next 12 months? (MAX 2 ANSWERS)

	Market potential	Customer request	Increased competition	Supplier offering a new feature or business solution	New legal or administrative requirements coming into force in the coming years
EU28	40	39	36	12	12
Company size					
1-9	38	39	35	13	13
10-49	46	39	43	8	9
50-249	51	35	42	7	21
250+	47	44	57	4	10
Sectors grouped (NACE)					
Manufacturing (C)	36	39	35	12	8
Retail (G)	40	34	39	15	10
Services (H/I/J/K/L/M/N/R)	41	43	36	9	14
Industry (D/E/F)	33	40	31	16	16
Company age					
Before 2010	37	39	37	12	13
Between 2010 and 2015	48	36	32	12	10
After 2015	58	37	42	7	4
Company's turnover in 2015					
Up to 100 000 euros	37	33	39	12	12
More than 100 000 to 500 000 euros	38	46	36	14	13
More than 500 000 to 2 mil. euros	43	40	37	10	11
More than 2 mil. euros	52	35	40	8	17
Company's turnover since 2013					
Risen by 5% or more	48	40	33	13	13
Remained approx. the same	34	45	37	10	13
Fallen by 5% or more	33	26	45	14	12

4 Reasons not to invest in innovation

A relative majority of companies say they decided NOT to invest in innovation because the investment would not be profitable

Companies that do not invest in innovation or plan not to continue investing in innovation over the next 12 months, were asked to consider their main reasons for not doing so¹⁶.

Three out of ten companies thought the investment would not be profitable (30%), while slightly less suggested lack of financial resources (28%) to be their reason for not investing in innovation. Less than a quarter of companies felt lack of demand (23%) to be their main reason for not investing.

Less than one in ten companies mention the complexity of legal or administrative requirements (9%) or the lack of human resources (8%) as a deciding factor for not investing. A smaller proportion blame lack of skills (3%) as a reason for not investing in innovation.

A proportion of companies that didn't invest and don't plan to invest in innovation, don't know (10%) why they decided not to, while 15% of companies have other reasons not mentioned in this survey.

Q10B What are the two main reasons why your company decided NOT to invest in innovation in the next 12 months? (MAX. 2 ANSWERS) (% - EU)



Base: Companies that have not invested and no plans to invest in the next 12 months (n = 6678), 51% of base

¹⁶ Q10B. What are the two main reasons why your company decided NOT to invest in innovation in the next 12 months? ANSWERS Lack of human resources; Lack of financial resources; Lack of skills; Lack of demand; The investment would not be profitable; The legal or administrative requirements are too complicated; Other; Don't know/not applicable. (Max 2 answers).

Country analysis

For US companies that have not invested in innovation or plan not to in the next 12 months, the main two reasons for not investing in innovation are the fact that **the investment would not be profitable** (38%) and the **lack of demand** (25%). They are more likely to say the investment would not be profitable compared to the EU countries on the whole (38% vs. 30%). They are less likely however, to say lack of financial resources is a reason for not investing compared with the EU countries (14% vs. 28%).

More than three in ten companies in Switzerland, that haven't or plan not to invest in innovation in the next 12 months, have **other** reasons (31%) not mentioned in this survey for not doing so. Compared with their EU counterparts, they are twice more likely to say other reasons for not investing (31% vs. 15%). A quarter of companies say the **investment would not be profitable** (25%), and a further 21% each say the **lack of financial resources** or **lack of demand** are their reasons for not investing in innovation in the future. Compared with EU businesses, companies in Switzerland are less likely to mention these reasons the **lack of financial resources** (21% vs. 28%) and **investment would not be profitable** (25% vs. 30%).

The fact that the **investment would not be profitable** is the most mentioned reason for not investing or planning to invest in innovation in 12 EU countries. Almost half of all companies in Denmark (47%) are most likely to mention this as a reason for not investing, followed by 39% of companies in Finland and 36% of companies in Sweden, Slovenia and Spain. Least likely to use this reason are companies in Cyprus (8%) and Malta (14%).

In 11 EU countries, the most mentioned reason for not investing innovation or planning to do so is due to a **lack of financial resources**. Half of companies in Cyprus (50%) mention this reason, whilst more than four in ten companies in Greece (43%), Bulgaria (42%) and Croatia (41%) think this is why they are not investing in innovation. This is in contrast to small proportions of companies in Malta (7%), Denmark (7%) and Sweden (8%) that believe this is the reason why they decided not to invest in innovation.

In Lithuania, an equal proportion of companies think the **investment would not be profitable** and **lack of financial resources** (32%) as their main reasons for not investing innovation.

Lack of demand is the most mentioned reason for not investing in two EU countries, the Netherlands (38%) and France (36%), while it is the least mentioned in Slovenia (5%) and Denmark (9%).

Across the EU, less than one in ten companies consider the **legal or administrative requirements are too complicated** as reason for not investing. This reason is not the most mentioned in any country. Companies in Croatia (18%), Slovakia (17%) and Poland (17%) are more likely to mention this reason than Malta (0%), Estonia (1%) or Sweden (2%).

Fewer than 10% of companies in the EU overall mention the **lack of human resources** (8%) as a reason not to invest. Companies in Luxembourg (17%) and Belgium (16%) are more inclined to do so than Malta (0%), Cyprus (0%) or Italy (1%).

Lack of skills is the least mentioned reason in the majority of EU countries. The highest proportion mentioning this reason is observed in Finland (7%).

Q10B What are the two main reasons why your company decided NOT to invest in innovation in the next 12 months? (MAX. 2 ANSWERS) (%)

		The investment would not be profitable	Lack of financial resources	Lack of demand	The legal or administrative requirements are too complicated	Lack of human resources	Lack of skills	Other (SPONTANEOUS)	Don't know
EU28		30	28	23	9	8	3	15	10
BE		25	19	19	12	16	4	24	11
BG		18	42	23	11	7	2	13	7
CZ		30	29	14	16	12	5	15	9
DK		47	7	9	5	7	6	14	13
DE		30	10	12	10	11	3	22	21
EE		22	16	24	1	5	3	32	9
IE		35	29	21	8	7	6	12	6
EL		22	43	29	15	4	2	18	4
ES		36	31	28	7	6	4	9	8
FR		31	32	36	13	13	6	15	2
HR		33	41	15	18	6	0	17	1
IT		24	36	14	7	1	1	17	11
CY		8	50	17	3	0	2	15	20
LV		30	35	20	8	8	3	15	8
LT		32	32	15	4	10	6	15	8
LU		21	18	21	6	17	4	29	9
HU		24	35	14	7	13	3	22	8
MT		14	7	14	0	0	0	43	21
NL		34	26	38	9	6	4	11	12
AT		29	23	17	13	14	0	23	7
PL		32	33	19	17	13	5	9	8
PT		33	38	20	7	7	1	15	9
RO		23	35	27	4	12	3	19	6
SI		36	24	5	4	6	2	26	8
SK		27	37	12	17	10	2	9	8
FI		39	20	22	9	10	7	12	14
SE		36	8	14	2	7	3	22	17
UK		32	17	28	5	7	2	13	17
CH		25	21	21	12	6	0	31	4
US		38	14	25	5	7	1	7	22

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

Base: Companies that have not invested and no plans to invest in the next 12 months (n = 6678), 51% of base

An analysis of the **company characteristics** shows that:

- The most mentioned reasons for deciding not to invest in innovation amongst smaller companies (1-9 employees) are **the investment would not be profitable** (30%) and **lack of financial resources** (29%) whilst larger companies are more likely to have **other** reasons (54%) not listed in this survey.
- Manufacturing companies are more likely than companies in the service sector to say **lack of financial resources** is the reason why they decided not to invest or plan to invest in innovation (40% vs. 24%).
- Smaller turnover companies (up to €100,000) are more likely to say **lack of financial resources** is the reason why they decided not to invest compared with larger turnover companies (€500,000 or more) (35% vs. 15-25%).
- Unsurprisingly the most mentioned reason for deciding not to invest for companies with falling turnover of 5% or more is **lack of financial resources** (37%), compared with growing turnover companies (22%). The most mentioned reason for deciding not to invest in innovation by companies with turnover growing by 5% or more is that the **investment would not be profitable** (33%).

Q10b What are the two main reasons why your company decided NOT to invest in innovation in the next 12 months? (MAX 2 ANSWERS)
(% - EU)

	The investment would not be profitable	Lack of financial resources	Other (DO NOT READ OUT)
EU28	30	28	15
Company size			
1-9	30	29	15
10-49	34	24	14
50-249	22	12	32
250+	13	10	54
Sectors grouped (NACE)			
Manufacturing (C)	30	40	12
Retail (G)	30	30	14
Services (H/I/J/K/L/M/N/R)	31	24	18
Industry (D/E/F)	28	29	14
Company's turnover in 2015			
Up to 100 000 euros	28	35	14
More than 100 000 to 500 000 euros	33	29	14
More than 500 000 to 2 mil. euros	31	25	15
More than 2 mil. euros	33	15	17
Company's turnover since 2013			
Risen by 5% or more	33	22	17
Remained approx. the same	33	25	15
Fallen by 5% or more	25	37	14

IV. THE ROLE OF DESIGN

In more than six out of ten companies, design plays a role in some way.

This section explores the role of design in a company’s strategy.

During the survey, companies were given a definition of what design means - “Design is defined as covering a range of applications within companies, providing a means to integrate functionality, appearance and user experience, for goods or services. Design can also provide a means to build corporate identity and brand recognition.”

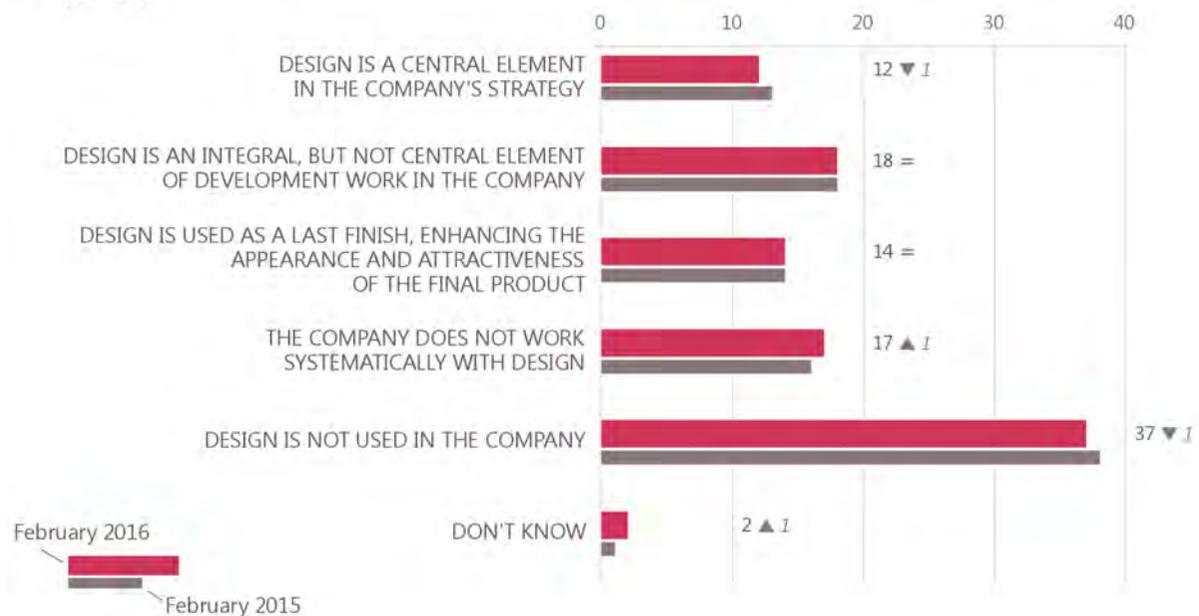
Companies were then asked which statement best described the activities of their company with regards to design¹⁷.

Less than a fifth of companies say design is an integral, but not central element of development work within the company (18%), while 17% say it is not used systematically within the company. For 14%, design is used as a last finish, and 12% say it is a central element in the company’s strategy.

More than a third of companies say design is not used in the company (37%).

There is very little change in results since the last survey in 2015.

Q1 Which of the following statements best describes the activities of your company with regard to design? (% - EU)



Base : All companies (n = 13,112, 100% of base)

¹⁷ Q1. Which of the following statements best describes the activities of your company with regard to design? ANSWERS: Design is a central element in the company’s strategy; Design is integral, but not central element of development work in the company; Design is used as a last finish, enhancing the appearance and attractiveness of the final product; The company does not work systematically with design; Design is not used in the company.

Country analysis

US companies are more likely than those in the EU to say design is not used in the company (46% vs. 37%) and design is a central element in the company's strategy (15% vs. 12%). However, EU companies are more likely than those in the US to say the company **does not work systematically with design** (17% vs 9%).

Businesses in Switzerland are more likely to say **design is an integral, but not a central element** of development compared with companies in the EU (24% vs. 18%). Conversely, companies in Switzerland are less likely than those in the EU to say **design is not used** in the company (21% vs. 37%).

Companies in Austria and Denmark (both 21%) are more likely to say **design is a central element in the company's strategy** than businesses in Croatia, Latvia, Lithuania and Slovenia (all 5%).

Design is an integral, but not a central element of development in the company is most mentioned by companies in Spain (29%) and Cyprus (25%) as describing their activities and, together with companies in Malta (25%), they are more likely to say this than businesses in Finland (10%), Estonia (11%), Ireland and Italy (both 13%).

Companies in Austria (23%), France (22%) and Croatia (22%) are more **likely to say design is used as a last finish**. This compares with 6% of companies in Estonia and 7% in Hungary.

In two Member States, at least one quarter of companies say the company **does not work systematically with design**: Hungary (32%) and Finland (28%). This compares to 7% of companies in the United Kingdom, and 11% in Lithuania.

In the vast majority of EU Member States, the most mentioned statement is **design is not used in the company**. At least one fifth of all companies in every EU country say design is not used in the company. Companies in Estonia (58%) and Lithuania (51%) are more likely to say this than companies in Austria (23%) and Cyprus (23%).

Evolutions since 2015

Since the last survey, across the EU there has been very little change across the various statements.

In the US, however, companies are more likely to say design is used as a last finish than they were in 2015 (+5 percentage points). In Switzerland, there is an increase in the proportion of companies that say design is an integral, but not central element of development work in the company (+8 pp), and a decline in the proportion that say design is not used in the company (-11 pp).

For the majority of EU countries, there have been only small shifts since the last survey in the proportions of companies saying that **design is a central element in the company's strategy**. The most notable changes since the last survey can be observed in Greece (-29 pp) and Cyprus (-26 pp). However, these decreases are largely expected and due to a change in the wording in the questionnaire in Greek language.

Since the last survey in 2015, companies in Malta (-14 pp) are less likely to say **design is an integral, but not central element of development work in the company**, while companies in Slovenia are more likely to mention this (+10 pp).

Companies in Croatia (+12 pp) and France (+8 pp) are more likely to say that **design is used as a last finish** than they did in 2015. Companies in Hungary and Slovenia are less likely to say this (both -6 pp), while, for the majority of EU countries, the changes since the last survey are of five or less percentage points.

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Companies that are more likely to say they **don't work systematically with design** since the last survey are those in Malta (+12 pp). Companies less likely to say this since the last survey are those located in Portugal (-7 pp). For the rest of the EU countries, the differences since the last survey are of 5 percentage points or less.

There have been large increases in the proportions declaring that **design is not used in the company** since the last survey. Companies more likely to say this are those in Luxembourg (+15 pp) and the United Kingdom (+12 pp), compared with companies in Germany (-9 pp), Belgium (-9 pp), Estonia (-8 pp) and Denmark (-8 pp) that are less likely to say this since the last survey.

Q1 Which of the following statements best describes the activities of your company with regard to design? (%)

		Design is a central element in the company's strategy	2016 - 2015	Design is an integral, but not central element of development work in the company	2016 - 2015	Design is used as a last finish, enhancing the appearance and attractiveness of the final product	2016 - 2015	The company does not work systematically with design	2016 - 2015	Design is not used in the company	2016 - 2015	Don't know
EU28		12	▼ 1	18	=	14	=	17	▲ 1	37	▼ 1	2
BE		13	▲ 1	19	▲ 3	16	▲ 1	19	▲ 5	32	▼ 9	1
BG		11	▲ 2	16	▼ 2	18	▲ 5	13	=	40	▼ 5	2
CZ		13	▲ 4	24	▼ 4	13	▲ 4	18	▼ 5	30	▲ 1	2
DK		21	▲ 6	18	▲ 2	14	▲ 1	22	▲ 3	24	▼ 8	1
DE		18	▲ 1	19	▲ 2	19	▲ 5	17	=	24	▼ 9	3
EE		8	▲ 1	11	▲ 3	6	▲ 3	15	▲ 1	58	▼ 8	2
IE		16	▲ 2	13	▼ 4	14	▼ 1	15	=	40	▲ 4	2
ES		13	▲ 1	29	▲ 3	11	▼ 3	21	▲ 4	25	▼ 5	1
FR		9	▼ 3	15	▼ 5	22	▲ 8	13	=	39	▼ 1	2
HR		5	▼ 2	15	▼ 7	22	▲ 12	13	▼ 3	44	▲ 1	1
IT		9	▼ 1	13	▲ 1	13	▼ 3	15	▲ 4	50	▼ 1	0
LV		5	=	21	▼ 7	12	▲ 1	15	▼ 4	45	▲ 8	2
LT		5	▼ 1	17	▼ 4	15	▲ 4	11	▼ 5	51	▲ 8	1
LU		11	▼ 7	24	▼ 2	10	▼ 5	12	=	43	▲ 15	0
HU		9	▲ 2	17	▲ 3	7	▼ 6	32	▲ 1	35	▲ 1	0
MT		18	▲ 1	25	▼ 14	11	▼ 2	16	▲ 12	30	▲ 3	0
NL		19	▲ 1	16	▲ 2	10	▼ 1	18	▲ 3	34	▼ 6	3
AT		21	▲ 4	19	▲ 1	23	▲ 1	14	▼ 2	23	▼ 3	0
PL		7	▼ 1	17	=	8	▼ 3	19	▲ 4	49	▲ 3	0
PT		11	▲ 2	19	▲ 7	14	▼ 2	18	▼ 7	37	▼ 1	1
RO		11	▼ 3	15	=	15	▲ 2	21	▲ 5	36	▼ 4	2
SI		5	▲ 1	20	▲ 10	8	▼ 6	22	▼ 4	43	▼ 2	2
SK		10	▲ 2	18	▼ 1	13	▼ 4	18	▼ 1	39	▲ 4	2
FI		7	▼ 2	10	▼ 3	13	▲ 2	28	▲ 5	41	▼ 2	1
SE		11	▼ 3	15	▲ 5	14	▲ 3	21	▲ 1	37	▼ 7	2
UK		17	▼ 5	15	▼ 5	12	▼ 1	7	▼ 3	45	▲ 12	4
CH		17	▼ 1	24	▲ 8	18	▲ 1	19	▲ 4	21	▼ 11	1
US		15	▲ 1	13	▼ 2	13	▲ 5	9	▼ 3	46	▼ 3	4

Base: All companies (n = 13,112, 100% of base)

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The analysis at a **company characteristic** level reveals the following differences:

- Companies with at least 250 employees are more likely to say **design is a central element** in the company's strategy (34% vs. 11-15%). Smaller companies (less than 9 employees) are more likely to say **design is not used** in the company compared with larger businesses (39% vs. 18-29%).
- Companies in the industry sector are more likely to say **design is not used** in the company than other sectors (47% vs. 35-36%).
- Older companies (established before 2010) are more likely **not to use design** in their strategy (39%), compared to companies established between 2010 and 2015 (31%) and after 2015 (35%).
- Companies with falling turnover are also more likely than growing companies **not to use design** as part of their strategy (42% vs. 29%).
- Those companies that have introduced at least one innovation are more likely to say **design is an integral, but not central element** of development work in the company compared to companies that have not introduced any innovation (23% vs. 9%).
- Companies that have invested more than 11% of their turnover in innovation activities are more likely to say **design is a central element** in the company's strategy than companies investing less than this percentage (30% vs 8-17%).

Q1 Which of the following statements best describes the activities of your company with regard to design?
(% - EU)

	Design is a central element in the company's strategy	Design is an integral, but not central element of development work in the company	Design is used as a last finish, enhancing the appearance and attractiveness of the final product	The company does not work systematically with design	Design is not used in the company
EU28	12	18	14	17	37
Company size					
1-9	12	17	14	16	39
10-49	15	21	15	19	29
50-249	11	30	17	13	26
250+	34	21	6	20	18
Sectors grouped (NACE)					
Manufacturing (C)	13	19	16	15	35
Retail (G)	12	18	15	18	36
Services (H/I/J/K/L/M/N/R)	14	19	15	15	36
Industry (D/E/F)	6	15	12	18	47
Company age					
Before 2010	12	17	14	17	39
Between 2010 and 2015	13	21	17	17	31
After 2015	16	18	19	6	35
Company's turnover since 2013					
Risen by 5% or more	15	20	18	17	29
Remained approx. the same	11	17	13	18	40
Fallen by 5% or more	10	17	13	17	42
Innovation					
At least one	15	23	17	16	28
None	6	9	9	18	56
Goods or services innovators	16	23	17	15	28
Other innovators	11	18	21	19	30
Non-innovators	6	9	9	18	56
% of company's turnover in 2015 invested in innovation activities					
0%	8	19	12	17	42
Less than 1%	13	21	21	18	26
Between 1 and 5%	17	21	19	17	25
Between 6 and 10%	17	31	23	10	18
11% or more	30	25	15	10	19

V. USE OF ADVANCED MANUFACTURING TECHNOLOGIES

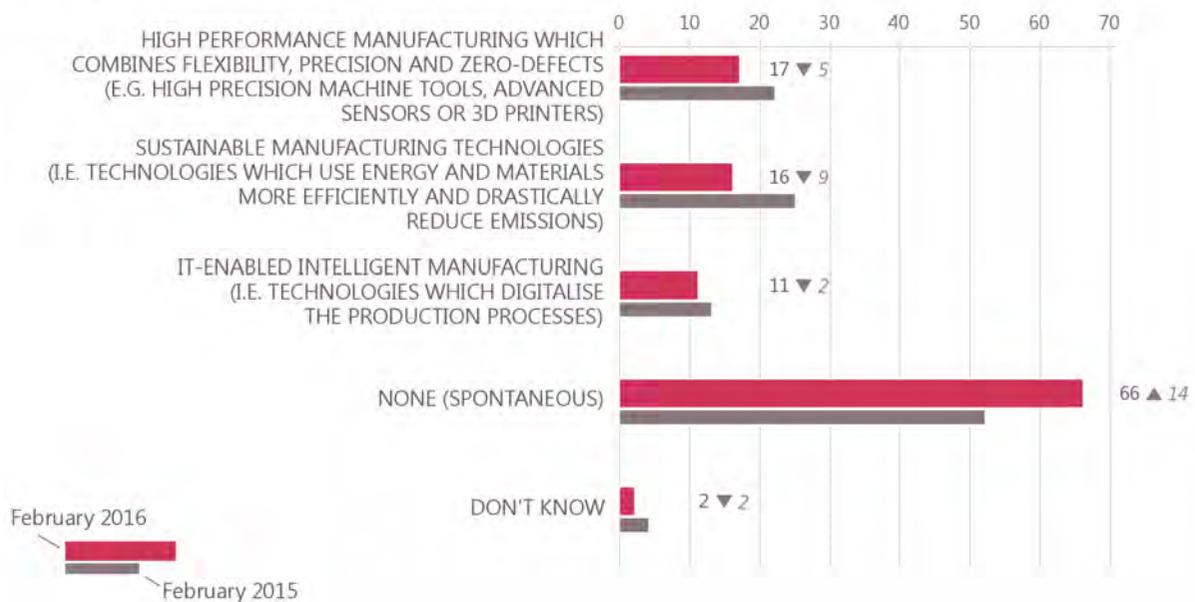
Less than a fifth of manufacturing companies use high performance manufacturing or sustainable technologies.

Manufacturing companies were asked whether they have used a range of specific technologies¹⁸.

Less than one in five manufacturing companies have used high performance manufacturing technologies (17%, -5 pp), and slightly less companies (16%, -9 pp) say they have used sustainable manufacturing technologies. More than one in ten manufacturing companies have used IT-enabled intelligent manufacturing (11%, -2 pp). With all three technologies there have been declines since the last survey.

Around two thirds of manufacturing companies have not used any of these technologies (66%), and this proportion has increased considerably since the last survey (+14 percentage points).

Q11A Have you used any of the following technologies? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: All manufacturing companies (n = 1151), 9% of base

Due to small sample sizes, the country analysis could not be performed for this question.

¹⁸ Q11A Have you used any of the following technologies? ANSWERS Sustainable manufacturing technologies (i.e. technologies which use energy and materials more efficiently and drastically reduce emissions); IT-enabled intelligent manufacturing digitalise the production processes); High performance manufacturing which combines flexibility, precision and zero defects (eg. High precision machine tools, advanced sensors or 3D printers); None; Don't know/not applicable.

The analysis at a **company characteristic** level, where sample size is sufficient, shows that:

- Companies with large turnover (higher than €2 million) are more likely to have used all of these technologies. They are more likely than lower turnover businesses (less than €2 million) to have used sustainable manufacturing technologies (33% vs 11-17%), IT-enabled intelligent technologies (25% vs. 5-18%) and high performance manufacturing (25% vs. 17-20%).
- Rising turnover companies are more likely to have used sustainable manufacturing technologies than companies with falling or steady turnover (21% vs. 10-13%). Falling turnover companies are more likely than growing companies not to have used any of the technologies (72% vs. 61%).

Q11A Have you used any of the following technologies? (MULTIPLE ANSWERS POSSIBLE)

	Sustainable manufacturing technologies (i.e. technologies which use energy and materials more efficiently and drastically reduce emissions)	IT-enabled intelligent manufacturing (i.e. technologies which digitalise the production processes)	High performance manufacturing which combines flexibility, precision and zero-defects (e.g. high precision machine tools, advanced sensors or 3D printers)	None (DO NOT READ OUT)
EU28	16	11	17	66
Company's turnover in 2015				
Up to 100 000 euros	11	5	17	71
More than 100 000 to 500 000 euros	17	6	13	67
More than 500 000 to 2 mil. euros	11	18	20	62
More than 2 mil. euros	33	25	25	51
Company's turnover since 2013				
Risen by 5% or more	21	11	16	61
Remained approx. the same	13	10	14	68
Fallen by 5% or more	10	7	17	72

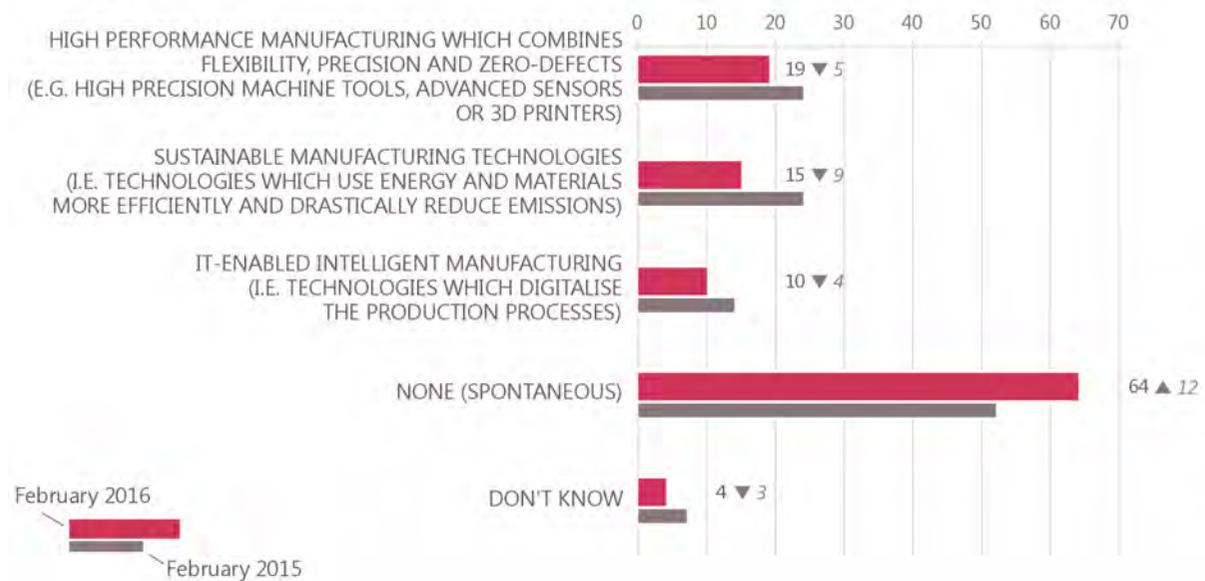
Less than one fifth of manufacturing companies plan to use high performance or sustainable manufacturing technologies

Manufacturing companies were also asked whether they planned to use any of the abovementioned technologies during the next 12 months¹⁹.

Less than one in five manufacturing companies are planning to use high performance manufacturing technologies in the next 12 months (19%, -5 pp). Slightly less propose to use sustainable manufacturing technologies (15%, -9 pp) and one in ten companies plan to use IT-enabled intelligent manufacturing (10%, -4 pp). Since the last survey, there have been declines across all three types of technologies.

Almost two thirds of companies do not plan to use any of the technologies mentioned (64%) which has increased considerably since the last survey by 12 percentage points.

Q11B Do you plan to use any of the following technologies in the next 12 months?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: All manufacturing companies (n = 1151, 9% of base)

¹⁹ Q11B Do you plan to use any of the following technologies in the next 12 months? ANSWERS: Sustainable manufacturing technologies (i.e. technologies which use energy and materials more efficiently and drastically reduce emissions); IT-enabled intelligent manufacturing digitalise the production processes); High performance manufacturing which combines flexibility, precision and zero defects (eg. High precision machine tools, advanced sensors or 3D printers); None; Don't know/not applicable.

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An analysis at country level is not possible due to sample sizes.

Company characteristics show that:

- Larger turnover companies (higher than €2 million) are more likely to say they are planning to use **high performance technologies** than smaller companies (37% vs. 14-23%). They are also more likely to plan to use **sustainable manufacturing** (32% vs 8-21%) and **IT-enabled technologies** (24% vs 8-12%).
- Growing turnover companies are more likely to plan to use **high performance technologies** than steady or declining turnover companies (26% vs 11-15%).
- Companies that consider design as a central element of their strategy are more likely to plan to use **high performance technologies** in the next 12 months, compared with companies that do not use design in their companies (28% vs. 12%). They are also more likely to plan to use **sustainable manufacturing** (22% vs. 13%) and **IT-enabled technologies** (14% vs. 9%).
- Companies that do not use design in their approach are much more likely not to plan to use **any of the technologies** mentioned compared with those that use design in their strategy (77% vs. 47-57%).
- Companies that have introduced at least one new innovation in the past 12 months are also more likely to plan to use **at least one new technology** than companies that have not innovated (40% vs 15%).

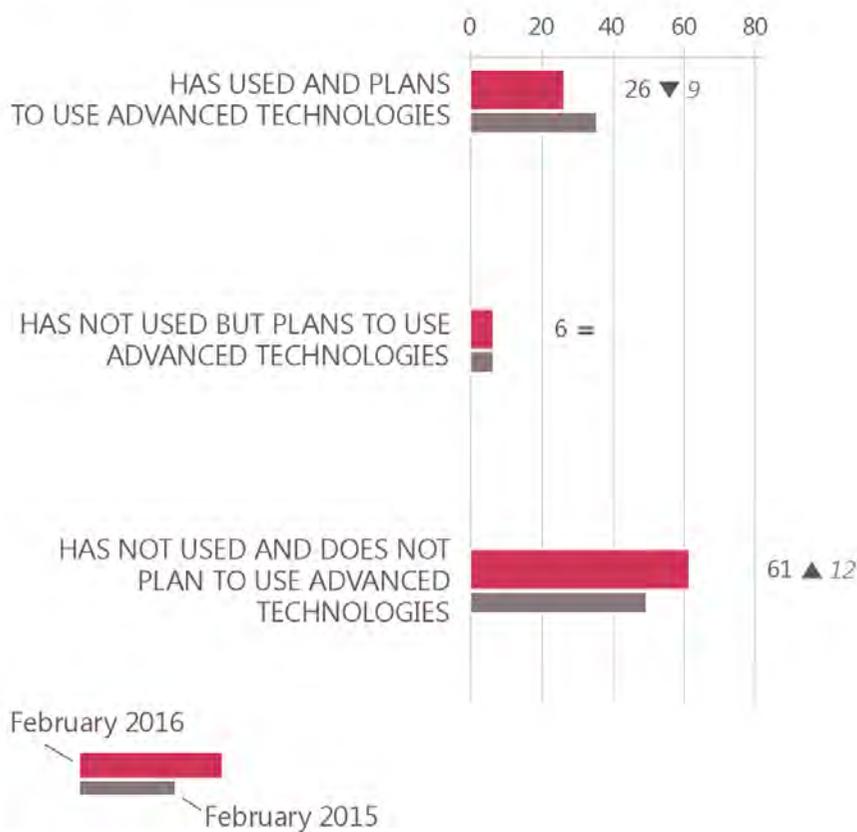
Q11B Do you plan to use any of the following technologies in the next 12 months?
(MULTIPLE ANSWERS POSSIBLE)

	Sustainable manufacturing technologies (i.e. technologies which use energy and materials more efficiently and drastically reduce emissions)	IT-enabled intelligent manufacturing (i.e. technologies which digitalise the production processes)	High performance manufacturing which combines flexibility, precision and zero-defects (e.g. high precision machine tools, advanced sensors or 3D printers)	None (DO NOT READ OUT)
EU28	15	10	19	64
Company's turnover in 2015				
Up to 100 000 euros	8	8	14	70
More than 100 000 to 500 000 euros	12	7	16	72
More than 500 000 to 2 mil. euros	21	12	23	60
More than 2 mil. euros	32	24	37	39
Company's turnover since 2013				
Risen by 5% or more	17	12	26	60
Remained approx. the same	18	10	15	64
Fallen by 5% or more	10	9	11	75
Company's approach to design				
Central element	22	14	28	47
Integral but not central	16	18	27	56
Used as last finish	16	8	28	57
Not systematically used	13	5	12	69
Not used	13	9	12	77
Innovation				
At least one	19	14	25	57
None	8	3	7	80
Goods or services innovators	19	14	27	56
Other innovators	17	13	10	62
Non-innovators	8	3	7	80

By combining the data of the present use and future intention²⁰, it appears that more than a quarter of manufacturing companies have used at least one of these technologies and plans to use them more (26%). Significantly less manufacturing companies indicate this compared to the last survey (-9 percentage points).

More than six out of ten manufacturing companies (61%) have not used any of these technologies and have no plans for the next 12 months to do so. Compared to the last survey in 2015, this proportion has increased by 12 percentage points. A very small percentage (6%) have indicated they haven't used the technology but plan to do so in the next 12 months.

Present and future take up of advanced manufacturing technologies (% - EU)



Base: All manufacturing companies (n = 1151, 9% of base)

Analysis at **country level** is not possible due to sample size.

²⁰ **Has used and plans to use advanced technologies** covers the companies that have used the advanced manufacturing technologies explored in Q11A and plan to use them in Q11B.

Has used but does not plan to use advanced technologies covers the companies that have answered they have used the advanced manufacturing technologies explored in Q11A and answered "none" or "don't know" in Q11B.

Has not used but plans to use advanced technologies covers the companies that have answered "none" or "don't know" in Q11A and answered they plan to use the advanced manufacturing technologies explored in Q11B.

Has not used and does not plan to use advanced technologies covers the companies that have answered "none" or "don't know" in both Q11A and Q11B.

Company characteristic analysis shows similar trends to those discussed earlier regarding larger companies being more likely to have used the technologies and to plan to use them. In addition,

- Companies that say **design is the central element** of their strategy are more likely to have used and plan to use these technologies in the future compared to those that **do not use design** (38% vs. 14%).
- **Innovating companies** are more likely to have used these technologies and have further plans to use them, compared with **non-innovating companies** (32% vs 13%).
- Companies that **plan to increase their percentage of investment in innovation** are more likely to have used these technologies and to plan to do so in the future compared with those that **do not foresee any investment or will keep their proportion of investment unchanged** (51% vs. 14-27%).

Q11T - Have you used any of the following technologies or do you plan to use any of the following technologies in the next 12 months?

	Has used and plans to use advanced technologies	Has used but does not plan to use advanced technologies	Has not used but plans to use advanced technologies	Has not used and does not plan to use advanced technologies
EU28	26	7	6	61
Company's approach to design				
Central element	38	12	12	38
Integral but not central	33	7	10	50
Used as last finish	35	8	7	50
Not systematically used	25	7	1	67
Not used	14	4	3	79
Innovation				
At least one	32	7	8	53
None	13	6	2	79
Goods or services innovators	33	7	9	51
Other innovators	28	7	1	64
Non-innovators	13	6	2	79
Planned % of investment dedicated to innovation in the next 12 months				
Increase	51	4	6	39
Reduce	33	13	2	52
Keep % unchanged	27	7	12	54
No plan to invest	14	14	2	70

VI. SKILLS REQUIRED TO HELP COMPANIES' INNOVATION ACTIVITIES

The most mentioned skills required over the next two years to help improve and support innovation are marketing and technical skills

Those companies that have introduced innovation were asked about the sort of skills that could help improve and support their innovation activities over the next two years²¹.

More than a quarter of all companies that have introduced innovation since 2013 say they will require **marketing skills** (28%) to help improve and support their innovation activities over the next two years. A slightly lower proportion require **technical skills** (24%) and 22% say they need **financial skills** related to investment and access to finance.

Slightly less than two in ten companies say they require **creativity, inventiveness and experimentation** (19%), **IT and the digital economy skills** (17%), and 15% say they need to develop skills in **flexibility, relationship building, resilience**.

Organisational and leadership skills are required by 14% of the innovative companies, while less than one in ten say **engineering skills** (7%) can help improve and support their innovation activities over the next two years.

Q12A Which two of the following skills could help improve and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS)
(% - EU)



Base: All companies that have introduced an innovation activity since January 2013 (n = 8276, 63% of base)

²¹ Q12A Which two of the following skills could help improve and support your company's innovation activities over the next two years? ANSWERS: Technical skills needed in your sector; Engineering skills; Organisational and leadership skills; Skills linked to IT and the digital economy; Creativity, inventiveness, experimentation; Soft skills like flexibility, relationship building, resilience; Marketing skills; Financial skills relating to investment and access to finance; Other; None; Don't know/not applicable.

Financial skills most mentioned as a skill by companies that have not innovated, as something that could kick-start and support a company’s innovation activities

Companies that have not introduced any innovation were then asked to determine which of the skills could help kick-start and support their innovation activities over the next two years²².

The top three skills mentioned in the previous question are the same top three skills mentioned in this question, yet in a slightly different order.

More than two in ten companies that have not innovated say financial skills relating to investment and access to finance (22%) could kick-start and support their activities. Technical skills remain the second most mentioned skill, with 17% of non-innovative companies saying this, followed by marketing skills (16%).

A quarter of all companies responded that none of the skills would actually kick-start and support their company’s innovation activities over the next two years (25%).

Skills linked to IT and the digital economy (11%), creativity, inventiveness and experimentation (11%) and soft skills like flexibility and relationship building (10%) are mentioned by around one in ten non-innovative companies as kick starters to support their activities in the next two years.

Less than one in ten non-innovative companies feel that having organisational and leadership skills (8%) or engineering skills (5%) will help kick-start and support their innovation activities.

Q12B Which two of the following skills could help kick start and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS) (% - EU)



Base: All companies that have not introduced an innovation activity since January 2013 (n = 4386), 33% of base

²² Q12B Which two of the following skills could help kick start and support your company's innovation activities over the next two years? ANSWERS: Technical skills needed in your sector; Engineering skills; Organisational and leadership skills; Skills linked to IT and the digital economy; Creativity, inventiveness, experimentation; Soft skills like flexibility, relationship building, resilience; Marketing skills; Financial skills relating to investment and access to finance; Other; None; Don't know/not applicable.

Companies think marketing, financial and technical skills could help improve/kick-start company’s innovation activities in next two years

The chart below displays the combination of results from the two previous questions (Q12A and Q12B), analysing the skills that could improve or kick start and support their company’s innovation activities over the next two years.

Overall, just less than a quarter say **marketing skills** (24%) could help improve or kick start and support their company’s innovation activities, followed by **financial** and **technical** skills (both 22%).

Less than one fifth of companies say, **creativity, inventiveness, experimentation** (16%) and **skills linked to IT and the digital economy** (15%) will improve or kick-start their innovation activities.

Slightly more than one in ten companies hold the view that **soft skills such as flexibility and relationship building** (13%) and **organisational and leadership skills** (12%) could improve or kick start their innovation activities.

Very few businesses hold the opinion that **engineering skills** (7%) could improve or kick start their company’s innovation activities over the next two years.

Q12T Which two of the following skills could help improve/kick start and support your company’s innovation activities over the next two years? (MAX. 2 ANSWERS) (% - EU)



Base: All companies (n = 13,112), 100%

Country analysis

Below is a chart highlighting the most mentioned skills by companies in each country.

In the US, 27% of companies mention marketing skills as something that could help improve or kick start their innovation activities, whilst in Switzerland the most mentioned reason is creativity, inventiveness and experimentation (26%).

In ten EU countries, **marketing skills** is the most mentioned skill companies say could help improve or kick start and support their company’s innovation activities. Countries with the highest proportion of companies to say this include Spain (34%), Ireland, Slovenia and the United Kingdom (each with 31% of companies saying this).

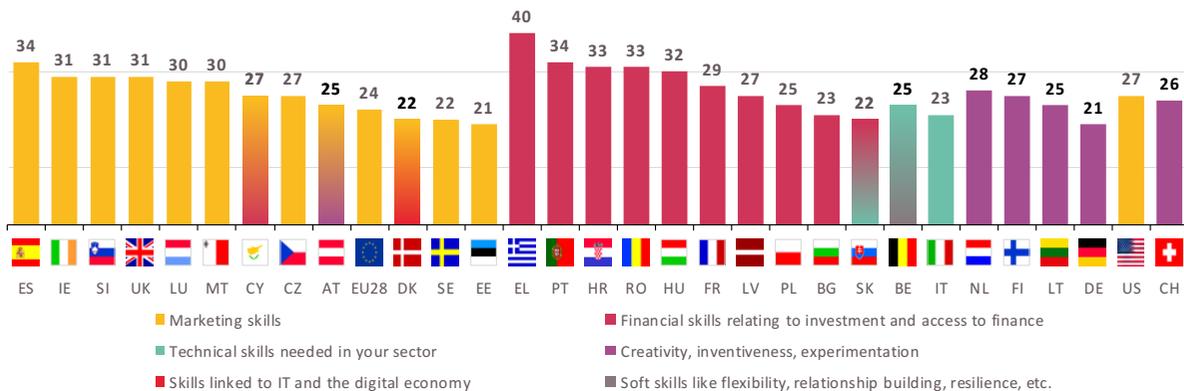
There are also three EU companies where marketing skills are the most mentioned along with other sets of skills: financial skills in Cyprus (27%), creativity, inventiveness and experimentation in Austria (25%) and skills linked to IT and digital economy in Denmark (22%).

In nine EU countries, **financial skills** is the most mentioned as a skill companies require to improve or kick start their innovation plans. Two in five companies in Greece (40%) and around one third of companies in Portugal (34%), Croatia (33%), Romania (33%) and Hungary (32%) hold this view. In Slovakia, financial skills are the most mentioned along with technical skills (22%).

Technical skills are the most mentioned also in Italy (23%) and in Belgium (25%), but in the latter case an equal proportion also mention soft skills.

Finally, **creativity, inventiveness and experimentation** are the most mentioned skills in four EU countries: Netherlands (28%), Finland (27%), Lithuania (25%) and Germany (21%).

Q12T Which two of the following skills could help improve/kick start and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS)
(% - THE MOST MENTIONED ANSWER BY COUNTRY)



Base: All companies (n = 13,112), 100% of base

Country analysis

Similar to the EU average, the most mentioned skill by companies in the US is **marketing** (27% vs. 24%). It is interesting to note that companies in the US are less likely than EU countries to say financial (9% vs. 22%) and technical skills (15% vs. 22%) could help improve or kick start and support their company's innovation activities over the next two years.

On the other hand, the most mentioned skill by companies in Switzerland is **creativity, inventiveness and experimentation** (26%), followed by **marketing skills** (21%). Companies in Switzerland are far more likely to mention creativity, inventiveness and experimentation than their EU counterparts (26% vs. 16%). The opposite can be said for **financial skills**, where companies in Switzerland are less likely than companies in the EU to say this would be helpful to improve or kick-start their company's innovation activities (14% vs. 22%).

Companies in Spain (34%), the United Kingdom (31%), Slovenia (31%) and Ireland (31%) are the most likely to say **marketing skills** could be helpful to improve or kick-start their innovation activities. This compares at the other end of the scale with 15% of companies in Latvia and 17% in Belgium where marketing skills are least likely to be mentioned as a skill that could kick start or improve their businesses.

At least two thirds of companies in Greece (40%), Portugal (34%), Croatia (33%) and Romania (33%) say **financial skills** relating to investment and access to finance could help improve or kickstart their innovation activities. This compares with just 12% of companies in Estonia and Denmark that think this.

Technical skills are more likely to be mentioned by companies in France and Malta (both 26%), and 25% in Belgium. At the other end of the scale, companies in Slovenia (12%), Finland (14%), Estonia (15%) and Cyprus (15%) are less likely to consider technical skills as something that could improve or kickstart their innovation activities over the next two years.

More than a quarter of companies in the Netherlands (28%) and in Finland (27%) consider **creativity, inventiveness and experimentation** as a way of improve or kick starting and supporting their innovation activities over the next two years. This compares with 7% of companies in Hungary, and 11% in each of Greece and Croatia.

Companies in Malta (23%), Ireland (23%), Belgium (22%) and Denmark (22%) are more likely to say they require **IT skills** to help improve or kick start their innovation activities than companies in Slovenia (9%) and Bulgaria (9%).

Q12T Which two of the following skills could help improve/kick start and support your company’s innovation activities over the next two years? (MAX. 2 ANSWERS)

(% - TOP 5 ANSWERS)

		Marketing skills	Financial skills relating to investment and access to finance	Technical skills needed in your sector	Creativity, inventiveness, experimentation	Skills linked to IT and the digital economy
EU28		24	22	22	16	15
BE		17	18	25	21	22
BG		20	23	18	18	9
CZ		27	16	23	20	17
DK		22	12	19	18	22
DE		20	15	20	21	15
EE		21	12	15	13	16
IE		31	19	16	16	23
EL		25	40	19	11	13
ES		34	22	24	13	13
FR		26	29	26	16	16
HR		30	33	21	11	13
IT		19	22	23	12	11
CY		27	27	15	15	10
LV		15	27	20	16	14
LT		21	18	18	25	10
LU		30	20	19	14	15
HU		25	32	19	7	11
MT		30	15	26	16	23
NL		26	18	22	28	20
AT		25	22	22	25	16
PL		19	25	23	18	12
PT		22	34	17	12	16
RO		25	33	18	14	18
SI		31	22	12	17	9
SK		21	22	22	19	10
FI		23	19	14	27	17
SE		22	15	20	16	17
UK		31	15	17	14	20
CH		21	14	18	26	15
US		27	9	15	13	13

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

Base: All companies (n = 13,112), 100% of base

An analysis of **company characteristics** shows that:

- Smaller companies with less than 50 employees are more likely to say **financial skills** would help improve or kick start their innovation activities than larger companies (50+ employees) (22-23% vs. 12%-15%).
- **Creativity, inventiveness and experimentation** are skills larger companies (250+ employees) are twice more likely to mention as skills that could kick start their innovation activities compared with small- and medium-sized companies (32% vs. 15-16%).
- Higher turnover companies (more than €2 million) are more likely than businesses trading up to €500,000 to say **organisational and leadership skills** (20% vs 11%) and **technical skills** (27% vs 21%) could improve or kick start their businesses.
- Growing turnover companies (rising by 5% or more) are more likely than falling turnover companies to say **organisational and leadership skills** (16% vs 8%) and **IT skills** (17% vs 11%) could kick start their business's innovation activities over the next two years. In contrast, falling turnover companies are more likely than growing companies to mention financial skills (27% vs. 21%).
- **Engineering skills** are also mentioned more often by larger companies with more than 50 employees (18% vs. 6-11% of companies with less than 50 employees).
- Companies in the industry sector are more likely to say **technical skills** would improve or kick start their innovation activities compared with other sectors (31% vs 20-25%). Retail (28%) sector companies are more likely to say **marketing skills** could help improve or kick start their businesses compared with companies from industry (18%).

In addition

- Companies that have introduced at least one innovation, are more likely than those that have not to say any of the skills could help improve or kick start their businesses. For example, they are more likely to mention marketing skills (28% vs 16%) and creativity, inventiveness, experimentation skills (19% vs 11%).
- Companies that plan to reduce the planned investment dedicated to innovation in the next 12 months are more likely than those that do not to say marketing skills (46% vs 22%-30%) and soft skills (19% vs. 11-16%) could help improve or kick start their innovation activities. Whereas companies planning to increase their spend on innovation in the next 12 months are more likely to say technical skills (25% vs 17%) would help support them compared with companies planning to reduce their spend on innovations over the next 12 months.

Q12T Which two of the following skills could help kick start and support your company's innovation activities over the next two years? (MAX 2 ANSWERS)

(% - EU)

	Marketing skills	Financial skills relating to investment and access to finance	Technical skills needed in your sector	Skills linked to IT and the digital economy	Creativity, inventiveness, experimentation	Organisational and leadership skills	Soft skills like flexibility, relationship building, resilience, etc.	Engineering skills
EU28	24	22	22	15	16	12	13	7
Company size								
1-9	24	23	21	15	16	11	13	6
10-49	24	22	25	16	16	18	16	11
50-249	24	15	30	14	15	27	17	18
250+	23	12	22	26	32	22	17	18
Sectors grouped (NACE)								
Manufacturing (C)	22	26	25	11	19	13	9	8
Retail (G)	28	22	20	14	15	11	13	4
Services (H/I/J/K/L/M/N/R)	24	22	20	19	18	13	15	7
Industry (D/E/F)	18	22	31	11	11	12	9	11
Company's turnover in 2015								
Up to 100 000 euros	24	23	21	14	16	11	13	5
More than 100 000 to 500 000 euros	24	25	21	16	19	11	14	6
More than 500 000 to 2 mil. euros	26	24	25	15	13	13	12	8
More than 2 mil. euros	23	15	27	16	17	20	17	12
Company's turnover since 2013								
Risen by 5% or more	26	21	24	17	18	16	15	8
Remained approx. the same	24	23	22	16	15	11	12	7
Fallen by 5% or more	22	27	21	11	14	8	12	5
Innovation								
At least one	28	22	24	17	19	14	15	7
None	16	22	17	11	11	8	10	5
Goods or services innovators	29	22	25	18	19	13	15	7
Other innovators	27	22	22	13	16	17	14	8
Non-innovators	16	22	17	11	11	8	10	5
Planned % of investment dedicated to innovation in the next 12 months								
Increase	30	26	25	20	19	16	14	9
Reduce	46	30	17	15	21	9	19	2
Keep % unchanged	29	20	26	18	22	15	16	7
No plan to invest	22	23	20	10	13	8	11	5

VII. THE POSITIVE IMPACT OF INNOVATION

Almost one in five believe their innovations will help job creation in 5 years from now.

This section explores areas where companies believe their innovations could make a positive impact. Companies were asked to consider their company’s innovation activities 5 years from now, and nominate the areas in which they could make a positive impact²³.

A quarter of companies say they **do not plan to introduce any innovations** over the next 5 years, while from other companies the response is more varied.

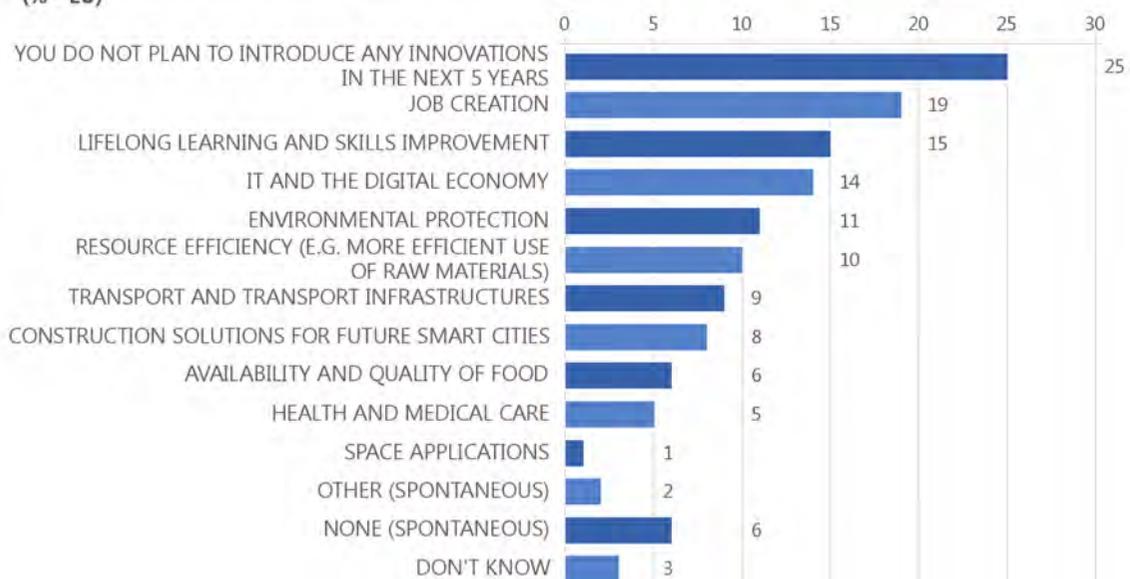
The two most mentioned areas where companies thought they could make a positive impact with their company’s innovation activities over the next 5 years are **job creation** (19%) and **lifelong learning and skills development** (15%).

More than one in ten companies, felt they could make a positive impact on IT and the digital economy (14%).

Environmental protection (11%) and **resource efficiency** (10%) are mentioned as areas where companies could make a positive impact with their innovations by around one in ten companies.

Less than 10% of companies consider their company’s innovation over the next 5 years having a positive impact on **transport or transport infrastructures** (9%), **construction solutions for future smart cities** (8%), **availability and quality of food** (6%), **health and medical care** (5%) or even **space applications** (1%).

Q13 Thinking about your company’s innovation activities 5 years from now, in which of the following areas do you think your innovations could make a positive impact? (MAX. 2 ANSWERS)
(% - EU)



Base: All companies (n = 13,112), 100% of base

²³ Q13. Thinking about your company’s innovations activities 5 years from now, in which of the following areas do you think your innovations could make a positive impact? ANSWERS: Job creation; IT and the digital economy; Resource efficiency (e.f. more efficient use of raw materials); Lifelong learning and skills improvement; Environmental protection; Construction solutions for future smart cities; space applications; Health and medical care; Transport and transport infrastructures; Availability and quality of food; You do not plan to introduce any innovations in the next 5 years; Other; None; Don't know/not applicable.

Country analysis

Almost half of the companies in the US indicate that they do not plan to introduce any innovations in the next 5 years (47%), and they are almost twice more likely than EU companies to say so (25%). US companies are also less likely to suggest their innovations would have an impact on job creation (12% vs. 19%), lifelong learning and skills development (15% vs. 7%), and IT and the digital economy (14% vs. 4%).

On the other hand, companies in Switzerland have different views. Less than one in five companies don't plan to introduce any innovations over the next 5 years, and are less likely to say so compared with EU companies (15% vs. 25%). Lifelong learning and skills development are mentioned by almost a quarter of all companies in Switzerland, and this proportion is higher than the EU average (24% vs. 15%).

Turning to the EU countries, more than a third of companies in the United Kingdom (41%) and Sweden (35%) say they **do not plan to introduce any innovations over the next five years**. At least one in five companies in 11 countries have this view. This compares with only 4% of companies in Malta, and 11% in Estonia and Romania that share this view.

Job creation is favoured by a large proportion of companies in Malta (39%) as an area their company's innovations will make a positive impact over the next 5 years. This is a view held by 31% of companies in Hungary and 30% in Romania. As few as 6% of companies in Sweden and 9% in the Netherlands think their innovations will have a positive impact on job creation over the next 5 years.

At least one in five companies in seven EU countries think **lifelong learning and skills development** will benefit from their company's innovations in the next 5 years. Most likely to say this are companies in Finland and Lithuania (both 22%), whereas few companies share this view in Malta (5%), Denmark (7%) and Slovenia (8%).

IT and the digital economy is mentioned by at least one in ten companies in 26 EU countries. More than a quarter of companies in Malta (26%) think their company's innovations will have a positive impact on IT in the next five years, followed by 21% of companies in the Netherlands and 20% in Belgium. Less than 10% of companies in Bulgaria (7%) and Slovenia (8%) think similarly.

Less than one fifth of all companies in the EU think their innovations will have a positive impact on **environmental protection** 5 years from now. The highest proportion of companies with this view can be observed in Belgium, Greece and France (all 19%). In ten EU countries, less than one in ten companies think their innovations will have a positive impact on environment protection, with as few as 5% of companies in the United Kingdom, and 7% each in Estonia, Denmark, Lithuania and Malta mentioning this.

Q13 Thinking about your company's innovation activities 5 years from now, in which of the following areas do you think your innovations could make a positive impact? (MAX. 2 ANSWERS)
 (% - TOP 5 ANSWERS)

		You do not plan to introduce any innovations in the next 5 years	Job creation	Lifelong learning and skills improvement	IT and the digital economy	Environmental protection
EU28		25	19	15	14	11
BE		19	19	20	20	19
BG		25	20	18	7	11
CZ		18	16	17	16	10
DK		16	12	7	17	7
DE		15	22	14	15	13
EE		11	15	17	13	7
IE		23	26	12	16	9
EL		18	21	9	15	19
ES		27	25	21	11	8
FR		30	18	21	13	19
HR		12	24	20	17	16
IT		22	16	9	11	9
CY		18	18	13	19	15
LV		25	18	14	15	10
LT		18	21	22	17	7
LU		25	15	11	13	17
HU		17	31	11	13	15
MT		4	39	5	26	7
NL		32	9	16	21	10
AT		14	19	14	17	16
PL		31	16	18	17	8
PT		19	26	13	14	10
RO		11	30	17	10	10
SI		14	25	8	8	17
SK		16	18	21	14	13
FI		13	22	22	15	10
SE		35	6	11	11	8
UK		41	13	11	18	5
CH		15	15	24	15	15
US		47	12	7	4	7
		Highest percentage per country		Lowest percentage per country		
		Highest percentage per item		Lowest percentage per item		

Base: All companies (n = 13,112), 100% of base

February 2016

An analysis of **company characteristics** shows that:

- Larger companies with 250 employees or more are more likely than smaller companies with 1-9 employees to say their company's innovations would have a positive impact on **resource efficiency** (24% vs. 9%), **IT and the digital economy** (23% vs 14%), **transport and transport infrastructure** (22% vs. 8%) and **environmental protection** (17% vs. 11%).
- Companies from the services sector are more likely than other sectors to say their company innovation activities will have a positive impact on **IT and the digital economy** (20% vs. 7-12%).
- Industry companies are twice more likely to say their innovations will have a positive impact on environmental protection (20% vs. 10%).
- Older companies established before 2010 in comparison with those established post 2015 are most likely to say **they won't be introducing any innovations** (26% vs. 16%).
- Younger companies are more likely to say their innovations will make a positive impact on **jobs creation** than older companies (25% vs. 17%).
- Growing turnover companies are more likely to say their innovations will make a positive impact on **IT and the digital economy** compared with falling turnover companies (19% vs. 9%).
- Companies that have introduced at least one innovation since January 2013 are more likely than companies that have not to say their innovation activities will have a positive impact in most of the areas. For example, they are more likely to say so for job creation (21% vs. 14%) and **lifelong learning and skills improvement** (17% vs. 11%).

Q13 Thinking about your company's innovation activities 5 years from now, in which of the following areas do you think your innovations could make a positive impact? (MAX 2 ANSWERS)

(% - EU)

	Job creation	Lifelong learning and skills improvement	IT and the digital economy	Environmental protection	Resource efficiency (e.f. more efficient use of raw materials)	Transport and transport infrastructures	You do not plan to introduce any innovations in the next 5 years
EU28	19	15	14	11	10	9	25
Company size							
1-9	18	15	14	11	9	8	26
10-49	22	18	13	13	14	15	14
50-249	19	15	22	17	18	11	18
250+	13	19	23	17	24	22	7
Sectors grouped (NACE)							
Manufacturing (C)	18	17	7	10	14	7	26
Retail (G)	20	12	12	10	8	9	26
Services (H/I/J/K/L/M/N/R)	17	18	20	10	9	9	22
Industry (D/E/F)	19	14	7	20	12	6	25
Company age							
Before 2010	17	15	14	12	9	9	26
Between 2010 and 2015	25	14	15	10	11	8	21
After 2015	25	18	15	10	17	7	16
Company's turnover since 2013							
Risen by 5% or more	21	16	19	12	11	10	18
Remained approx. the same	16	17	13	11	10	9	27
Fallen by 5% or more	20	12	9	11	8	8	30
Innovation							
At least one	21	17	16	13	11	9	17
None	14	11	10	7	6	8	39
Goods or services innovators	21	17	16	13	11	9	17
Other innovators	19	19	15	13	12	9	21
Non-innovators	14	11	10	7	6	8	39

TECHNICAL SPECIFICATIONS

Between the 1st and 19th February 2016, TNS Political & Social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the FLASH EUROBAROMETER 433 survey on request of the EUROPEAN COMMISSION, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs. It is a business survey co-ordinated by the Directorate-General for Communication, “Strategy, Corporate Communication Actions and Eurobarometer” Unit.

The FLASH EUROBAROMETER 433 survey covers covers businesses employing one or more persons in manufacturing (NACE category C), services (NACE categories G, H, I, J, K, L, M, N, R) and the industry sector (NACE categories D, E, F) in the 28 Member States of the European Union, Switzerland and the USA.

All interviews were carried using the TNS e-Call centre (our centralised CATI system). The sample was selected from an international business database, with some additional sample from local sources in countries where necessary.

Quotas were applied on both company size and sectors. These quotas were adjusted according to the country’s universe but were also reasoned in order to ensure that the sample was large enough in every cell.

	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES FIELDWORK		BUSINESSES	PROPORTION EU28
BE	Belgium	TNS Dimarso	500	1/02/2016	16/02/2016	572.068	2,06%
BG	Bulgaria	TNS BBSS	500	1/02/2016	12/02/2016	340.628	1,22%
CZ	Czech Rep.	TNS Aisa	500	1/02/2016	17/02/2016	1.005.971	3,61%
DK	Denmark	TNS Gallup DK	501	1/02/2016	19/02/2016	2.021.401	7,26%
DE	Germany	TNS Infratest	500	1/02/2016	19/02/2016	3.116.134	11,20%
EE	Estonia	TNS Emor	500	1/02/2016	12/02/2016	76.007	0,27%
IE	Ireland	IMS Millward Brown	500	1/02/2016	19/02/2016	205.492	0,74%
EL	Greece	TNS ICAP	500	1/02/2016	18/02/2016	56.001	0,20%
ES	Spain	TNS Demoscopia	500	1/02/2016	17/02/2016	3.313.013	11,90%
FR	France	TNS Sofres	500	1/02/2016	19/02/2016	3.110.259	11,18%
HR	Croatia	HENDAL	500	1/02/2016	17/02/2016	330.279	1,19%
IT	Italy	TNS Italia	500	1/02/2016	17/02/2016	4.202.388	15,10%
CY	Rep. Of Cyprus	CYMAR	200	1/02/2016	11/02/2016	60.452	0,22%
LV	Latvia	TNS Latvia	502	1/02/2016	16/02/2016	85.245	0,31%
LT	Lithuania	TNS LT	500	1/02/2016	13/02/2016	127.351	0,46%
LU	Luxembourg	TNS Dimarso	202	1/02/2016	11/02/2016	28.974	0,10%
HU	Hungary	TNS Hoffmann	500	1/02/2016	12/02/2016	615.404	2,21%
MT	Malta	MISCO	200	1/02/2016	16/02/2016	47.403	0,17%
NL	Netherlands	TNS NIPO	500	1/02/2016	17/02/2016	909.180	3,27%
AT	Austria	TNS Austria	503	1/02/2016	19/02/2016	359.727	1,29%
PL	Poland	TNS OBOP	501	1/02/2016	19/02/2016	1.957.966	7,03%
PT	Portugal	TNS Euroteste	500	1/02/2016	18/02/2016	1.035.493	3,72%
RO	Romania	TNS CSOP	501	1/02/2016	18/02/2016	516.314	1,86%
SI	Slovenia	RM PLUS	501	1/02/2016	18/02/2016	129.795	0,47%
SK	Slovakia	TNS AISA Slovakia	500	1/02/2016	17/02/2016	383.232	1,38%
FI	Finland	TNS Gallup Oy	501	1/02/2016	18/02/2016	303.233	1,09%
SE	Sweden	TNS Sifo	500	1/02/2016	18/02/2016	694.757	2,50%
UK	United Kingdom	TNS UK	500	1/02/2016	18/02/2016	2.228.126	8,01%
	TOTAL EU28					27.832.293	100%*
CH	Switzerland	Demo Scope AG	500	2/02/2016	17/02/2016	283.601	
US	United States	TNS Custom Research Inc.	500	1/02/2016	18/02/2016	13.657.524	
	TOTAL					41.773.418	

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

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

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

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READ OUT: Design covers a range of applications within companies, providing a means to integrate functionality, appearance and user experience, for goods and services. Design can also provide a means to build corporate identity and brand recognition.

Q1 Which of the following statements best describes the activities of your company with regard to design?

(READ OUT – ONE ANSWER ONLY)

Design is a central element in the company's strategy	1
Design is an integral, but not central element of development work in the company	2
Design is used as a last finish, enhancing the appearance and attractiveness of the final product	3
The company does not work systematically with design	4
Design is not used in the company	5
DK/NA (DO NOT READ OUT)	6

FL415 Q1

READ OUT: Innovation occurs when a company introduces a new or significantly improved good, service, process, marketing strategy or organisational method. The innovation can be developed by the company itself or has been originally developed by other companies or organisations.

Q2 Has your company introduced any of the following types of innovation since January 2013?

(READ OUT – ONE ANSWER ONLY)

		Yes	No	DK/NA (DO NOT READ OUT)
1	New or significantly improved goods	1	2	3
2	New or significantly improved services	1	2	3
3	New or significantly improved processes (e.g. production processes or distribution methods)	1	2	3
4	New or significantly improved marketing strategies (e.g. packaging, product promotion or placement, or pricing strategies)	1	2	3
5	New or significantly improved organisational methods	1	2	3

FL415 Q2

ASK Q3 IF INTRODUCED AN INNOVATIVE GOOD OR SERVICE SINCE JANUARY 2013, CODE 1 IN Q2.1 OR Q2.2 – OTHERS GO TO Q4

Q3 Approximately what percentage of your company's turnover in 2015 was due to innovative goods or services that have been introduced since January 2013?

(READ OUT – ONE ANSWER ONLY)

0%	1
Between 1 and 5%	2
Between 6 and 10%	3
Between 11 and 25%	4
Between 26 and 50%	5
51% or more	6
DK/NA (DO NOT READ OUT)	7

FL415 Q3

ASK ALL

Q4 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

(READ OUT - ONE ANSWER ONLY)

		0	Less than 1%	1 - 5 %	More than 5%	DK/NA (DO NOT READ OUT)
1	Training	1	2	3	4	5
2	Software development	1	2	3	4	5
3	Company reputation and branding, including web design	1	2	3	4	5
4	Research and development (R&D)	1	2	3	4	5
5	Design of products and services	1	2	3	4	5
6	Organisation or business process improvements	1	2	3	4	5
7	Acquisition of machines, equipment, software or licenses	1	2	3	4	5

FL415 Q4

ASK Q5A IF “YES” CODE 1 IN Q2.1 OR Q2.2 – OTHERS GO TO Q5B

Q5A Thinking about the commercialisation of your company’s innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

(READ OUT – ONE ANSWER ONLY)

		A major problem	A minor problem	Not a problem at all	DK/NA (DO NOT READ OUT)
1	Lack of human resources	1	2	3	4
2	Lack of financial resources	1	2	3	4
3	Finding or using new technologies	1	2	3	4
4	Cost or complexity of meeting regulations or standards	1	2	3	4
5	Difficulties in maintaining intellectual property rights	1	2	3	4
6	Administrative or legal issues	1	2	3	4
7	Lack of marketing expertise	1	2	3	4
8	Market dominated by established competitors	1	2	3	4
9	Low demand for your innovative goods or services	1	2	3	4
10	Weak distribution channels	1	2	3	4

FL415 Q5A

ASK Q5B IF “NO” CODE 2 OR “DK” CODE 3 IN Q2.1 AND Q2.2 – OTHERS GO TO Q6A

Q5B Thinking about the commercialisation of your company’s goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

(READ OUT – ONE ANSWER ONLY)

		A major problem	A minor problem	Not a problem at all	DK/NA (DO NOT READ OUT)
1	Lack of human resources	1	2	3	4
2	Lack of financial resources	1	2	3	4
3	Finding or using new technologies	1	2	3	4
4	Cost or complexity of meeting regulations or standards	1	2	3	4
5	Difficulties in maintaining intellectual property rights	1	2	3	4
6	Administrative or legal issues	1	2	3	4
7	Lack of marketing expertise	1	2	3	4
8	Market dominated by established competitors	1	2	3	4
9	Low demand for your goods or services	1	2	3	4
10	Weak distribution channels	1	2	3	4

FL415 Q5B

ASK Q6A IF “YES” CODE 1 IN Q2.1 OR Q2.2 – OTHERS GO TO Q6B

Q6A Thinking about possible public support for commercialisation of your innovative goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for:

(READ OUT – MAX. 2 ANSWERS)

Meeting regulations or standards	1,
Accessing or reinforcing online selling	2,
Participating in conferences, trade fairs, exhibitions	3,
Training staff in how to promote and market innovative goods or services	4,
Applying for, managing or protecting intellectual property rights	5,
Market-testing a product or service before launch	6,
Accessing or reinforcing your presence in export markets	7,
Other (DO NOT READ OUT)	8,
None (DO NOT READ OUT)	9,
DK/NA (DO NOT READ OUT)	10,

FL415 Q6A

ASK Q6B IF “NO” CODE 2 OR “DK” CODE 3 IN Q2.1 AND Q2.2 – OTHERS GO TO Q7

Q6B Thinking about possible public support for commercialisation of your goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for:

(READ OUT – MAX. 2 ANSWERS)

Meeting regulations or standards	1,
Accessing or reinforcing online selling	2,
Participating in conferences, trade fairs, exhibitions	3,
Training staff in how to promote and market innovative goods or services	4,
Applying for, managing or protecting intellectual property rights	5,
Market-testing a product or service before launch	6,
Accessing or reinforcing your presence in export markets	7,
Other (DO NOT READ OUT)	8,
None (DO NOT READ OUT)	9,
DK/NA (DO NOT READ OUT)	10,

FL415 Q6B

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**ASK Q7 AND Q8 IF “YES” CODE 1 IN Q2.1 OR Q2.2 OR Q2.3 OR Q2.4 OR Q2.5
- OTHERS GO TO Q10B**

Q7 Approximately what percentage of your company's turnover in 2015 was invested in innovation activities?

(READ OUT – ONE ANSWER ONLY)

0	1
Less than 1%	2
Between 1 and 5%	3
Between 6 and 10%	4
11% or more	5
DK/NA (DO NOT READ OUT)	6

FL415 Q7

Q8 Do you plan to increase, reduce or keep unchanged the percentage of investment dedicated to innovation in the next 12 months?

(READ OUT – ONE ANSWER ONLY)

Increase	1
Reduce	2
Keep the percentage unchanged	3
You do not plan to invest in innovation in the next 12 months	4
DK/NA (DO NOT READ OUT)	5

FL415 Q8

ASK Q9 AND Q10a IF “INVESTS IN INNOVATION”, EXCLUDE IF (CODE 1 IN Q7 AND (CODE 2 OR CODE 3 IN Q8)); OR IF (CODE 4 IN Q8) – OTHERS GO TO Q10B

Q9 What will be the focus of your planned investment in innovation in the next 12 months?

(READ OUT – MULTIPLE ANSWERS POSSIBLE)

Goods	1,
Services	2,
Processes (e.g. production processes or distribution methods)	3,
Marketing strategies (e.g. packaging, product promotion or placement or pricing strategies)	4,
Organisational methods	5,
DK/NA (DO NOT READ OUT)	6,

FL415 Q9

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Q10a What are the two main reasons why your company decided to invest in innovation in the next 12 months?*(READ OUT - MAX 2 ANSWERS)*

Market potential	1,
Customer request	2,
Increased competition	3,
Supplier offering a new feature or business solution	4,
New legal or administrative requirements coming into force in the coming years	5,
Other (DO NOT READ OUT)	6,
DK/NA (DO NOT READ OUT)	7,

FL415 Q10

ASK Q10b IF "NO" OR "DK" CODE 2 OR 3 IN Q2.1 AND Q2.2 AND Q2.3 AND Q2.4 AND Q2.5**OR 'DID NOT INVEST IN INNOVATION', CODE 1 IN Q7 AND CODE 3 IN Q8 OR 'DO NOT PLAN TO CONTINUE INVESTING IN INNOVATION', CODE 4 IN Q8 – OTHERS GO TO Q11A****Q10b What are the two main reasons why your company decided NOT to invest in innovation in the next 12 months?***(READ OUT – MAX 2 ANSWERS)*

Lack of human resources	1,
Lack of financial resources	2,
Lack of skills	3,
Lack of demand	4,
The investment would not be profitable	5,
The legal or administrative requirements are too complicated	6,
Other (SPONTANEOUS)	7,
DK/NA (DO NOT READ OUT)	8,

NEW

ASK Q11A AND Q11B ONLY TO MANUFACTURING COMPANIES**Q11A Have you used any of the following technologies?***(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

Sustainable manufacturing technologies (i.e. technologies which use energy and materials more efficiently and drastically reduce emissions)	1,
IT-enabled intelligent manufacturing (i.e. technologies which digitalise the production processes)	2,
High performance manufacturing which combines flexibility, precision and zero-defects (e.g. high precision machine tools, advanced sensors or 3D printers)	3,
None (DO NOT READ OUT)	4,
DK/NA (DO NOT READ OUT)	5,

FL415 Q11A

Q11B Do you plan to use any of the following technologies in the next 12 months?*(READ OUT – MULTIPLE ANSWERS POSSIBLE)*

Sustainable manufacturing technologies (i.e. technologies which use energy and materials more efficiently and drastically reduce emissions)	1,
IT-enabled intelligent manufacturing (i.e. technologies which digitalise the production processes)	2,
High performance manufacturing which combines flexibility, precision and zero-defects (e.g. high precision machine tools, advanced sensors or 3D printers)	3,
None (DO NOT READ OUT)	4,
DK/NA (DO NOT READ OUT)	5,

FL415 Q11B

ASK Q12A IF “YES” CODE 1 IN Q2.1 OR Q2.2 OR Q2.3 OR Q2.4 OR Q2.5 – OTHERS GO TO Q12B**ASK Q12B IF “NO” OR ‘DK’ CODE 2 OR 3 IN Q2.1 AND Q2.2 AND Q2.3 AND Q2.4 AND Q2.5 – OTHERS GO TO Q13****Q12A Which two of the following skills could help improve and support your company’s innovation activities over the next two years?***(READ OUT – MAX 2 ANSWERS)*

Technical skills needed in your sector	1,
Engineering skills	2,
Organisational and leadership skills	3,
Skills linked to IT and the digital economy	4,
Creativity, inventiveness, experimentation	5,
Soft skills like flexibility, relationship building, resilience, etc.	6,
Marketing skills	7,
Financial skills relating to investment and access to finance	8,
Other (DO NOT READ OUT)	9,
None (DO NOT READ OUT)	10,
DK/NA (DO NOT READ OUT)	11,

NEW

February 2016

Q12B Which two of the following skills could help kick start and support your company's innovation activities over the next two years?*(READ OUT – MAX 2 ANSWERS)*

Technical skills needed in your sector	1,
Engineering skills	2,
Organisational and leadership skills	3,
Skills linked to IT and the digital economy	4,
Creativity, inventiveness, experimentation	5,
Soft skills like flexibility, relationship building, resilience, etc.	6,
Marketing skills	7,
Financial skills relating to investment and access to finance	8,
Other (DO NOT READ OUT)	9,
None (DO NOT READ OUT)	10,
DK/NA (DO NOT READ OUT)	11,

NEW

ASK ALL**Q13 Thinking about your company's innovation activities 5 years from now, in which of the following areas do you think your innovations could make a positive impact?***(READ OUT – MAX 2 ANSWERS)*

Job creation	1,
IT and the digital economy	2,
Resource efficiency (e.g. more efficient use of raw materials)	3,
Lifelong learning and skills improvement	4,
Environmental protection	5,
Construction solutions for future smart cities	6,
Space applications	7,
Health and medical care	8,
Transport and transport infrastructures	9,
Availability and quality of food	10,
You do not plan to introduce any innovations in the next 5 years	11,
Other (DO NOT READ OUT)	12,
None (DO NOT READ OUT)	13,
DK/NA (DO NOT READ OUT)	14,

NEW

Q1 Which of the following statements best describes the activities of your company with regard to design? (%)

		Design is a central element in the company's strategy		Design is an integral, but not central element of development work in the company		Design is used as a last finish, enhancing the appearance and attractiveness of the final product	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415
EU28		12	-1	18	0	14	0
BE		13	1	19	3	16	1
BG		11	2	16	-2	18	5
CZ		13	4	24	-4	13	4
DK		21	6	18	2	14	1
DE		18	1	19	2	19	5
EE		8	1	11	3	6	3
IE		16	2	13	-4	14	-1
EL		19	-29	23	0	16	9
ES		13	1	29	3	11	-3
FR		9	-3	15	-5	22	8
HR		5	-2	15	-7	22	12
IT		9	-1	13	1	13	-3
CY		15	-26	25	-1	20	17
LV		5	0	21	-7	12	1
LT		5	-1	17	-4	15	4
LU		11	-7	24	-2	10	-5
HU		9	2	17	3	7	-6
MT		18	1	25	-14	11	-2
NL		19	1	16	2	10	-1
AT		21	4	19	1	23	1
PL		7	-1	17	0	8	-3
PT		11	2	19	7	14	-2
RO		11	-3	15	0	15	2
SI		5	1	20	10	8	-6
SK		10	2	18	-1	13	-4
FI		7	-2	10	-3	13	2
SE		11	-3	15	5	14	3
UK		17	-5	15	-5	12	-1
US		15	1	13	-2	13	5
CH		17	-1	24	8	18	1

Q1 Which of the following statements best describes the activities of your company with regard to design? (%)

		The company does not work systematically with design		Design is not used in the company		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		17	1	37	-1	2
BE		19	5	32	-9	1
BG		13	0	40	-5	2
CZ		18	-5	30	1	2
DK		22	3	24	-8	1
DE		17	0	24	-9	3
EE		15	1	58	-8	2
IE		15	0	40	4	2
EL		14	6	27	16	1
ES		21	4	25	-5	1
FR		13	0	39	-1	2
HR		13	-3	44	1	1
IT		15	4	50	-1	0
CY		16	10	23	4	1
LV		15	-4	45	8	2
LT		11	-5	51	8	1
LU		12	0	43	15	0
HU		32	1	35	1	0
MT		16	12	30	3	0
NL		18	3	34	-6	3
AT		14	-2	23	-3	0
PL		19	4	49	3	0
PT		18	-7	37	-1	1
RO		21	5	36	-4	2
SI		22	-4	43	-2	2
SK		18	-1	39	4	2
FI		28	5	41	-2	1
SE		21	1	37	-7	2
UK		7	-3	45	12	4
US		9	-3	46	-3	4
CH		19	4	21	-11	1

Q2.1 Has your company introduced any of the following types of innovation since January 2013?
New or significantly improved goods (%)

		Yes		No		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		40	-2	59	2	1
BE		47	4	52	-3	1
BG		38	6	61	-6	1
CZ		34	-1	64	1	2
DK		50	-4	50	7	0
DE		37	-5	62	5	1
EE		20	5	78	-3	2
IE		32	-12	65	10	3
EL		39	-9	61	9	0
ES		35	0	65	0	0
FR		48	5	52	-4	0
HR		38	-8	61	9	1
IT		51	-1	48	0	1
CY		39	2	60	-3	1
LV		31	-6	69	7	0
LT		31	0	68	2	1
LU		45	-7	53	5	2
HU		37	6	63	-6	0
MT		51	3	47	-5	2
NL		26	-3	73	3	1
AT		43	2	56	0	1
PL		37	-3	61	1	2
PT		47	-6	53	7	0
RO		44	4	55	-5	1
SI		40	12	59	-13	1
SK		29	-7	70	7	1
FI		31	-2	68	2	1
SE		28	1	72	0	0
UK		30	-9	68	12	2
US		30	7	68	-7	2
CH		38	-5	61	5	1

Q2.2 Has your company introduced any of the following types of innovation since January 2013?
New or significantly improved services (%)

		Yes		No		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		40	-5	59	5	1
BE		37	0	63	1	0
BG		45	7	55	-5	0
CZ		52	-2	47	1	1
DK		46	-6	54	7	0
DE		34	-6	64	4	2
EE		29	9	70	-8	1
IE		45	-4	55	5	0
EL		48	3	52	-3	0
ES		40	-5	59	4	1
FR		37	-4	62	3	1
HR		48	-12	52	13	0
IT		41	-4	59	5	0
CY		49	-2	50	1	1
LV		39	1	61	0	0
LT		36	-2	64	4	0
LU		36	-19	62	17	2
HU		28	-1	71	0	1
MT		60	9	40	-9	0
NL		39	-4	61	4	0
AT		45	-3	55	3	0
PL		45	-9	54	9	1
PT		42	-12	58	13	0
RO		48	4	52	-3	0
SI		50	14	49	-15	1
SK		48	-1	51	1	1
FI		34	-2	65	1	1
SE		30	-3	70	4	0
UK		34	-14	65	14	1
US		35	3	64	-3	1
CH		48	6	51	-7	1

Q2.3 Has your company introduced any of the following types of innovation since January 2013?
New or significantly improved processes (e.g. production processes or distribution methods) (%)

		Yes		No		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		30	-2	69	2	1
BE		32	-4	67	4	1
BG		29	4	70	-3	1
CZ		33	-4	64	1	3
DK		46	0	53	0	1
DE		34	6	65	-6	1
EE		24	0	75	-1	1
IE		28	-5	71	6	1
EL		37	2	63	-2	0
ES		32	2	67	-3	1
FR		32	6	68	-6	0
HR		37	-14	63	15	0
IT		30	-6	69	5	1
CY		56	5	43	-6	1
LV		35	-1	65	2	0
LT		31	5	68	-4	1
LU		34	-2	63	0	3
HU		24	7	75	-8	1
MT		50	7	48	-8	2
NL		20	-9	79	8	1
AT		32	1	68	-1	0
PL		21	-10	78	10	1
PT		43	-2	56	2	1
RO		33	3	67	-1	0
SI		37	9	62	-10	1
SK		28	-1	71	1	1
FI		23	-1	77	1	0
SE		21	0	79	1	0
UK		20	-8	78	8	2
US		27	10	71	-10	2
CH		37	-6	62	6	1

Q2.4 Has your company introduced any of the following types of innovation since January 2013?
New or significantly improved marketing strategies (e.g. packaging, product promotion or placement, or pricing strategies) (%)

		Yes		No		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		33	-3	67	3	0
BE		31	-5	68	4	1
BG		33	7	67	-5	0
CZ		36	-1	62	-1	2
DK		45	1	54	-1	1
DE		29	-2	70	1	1
EE		21	5	78	-5	1
IE		40	-6	58	4	2
EL		32	0	67	-1	1
ES		38	6	62	-6	0
FR		34	-1	65	0	1
HR		34	-8	66	8	0
IT		35	-7	65	7	0
CY		33	-6	66	5	1
LV		28	2	72	-1	0
LT		21	-1	77	1	2
LU		39	-1	59	-1	2
HU		23	4	77	-4	0
MT		50	-1	50	3	0
NL		25	-6	74	5	1
AT		37	0	63	1	0
PL		29	-5	71	5	0
PT		39	-7	61	8	0
RO		36	-6	62	4	2
SI		34	4	66	-4	0
SK		31	3	67	-4	2
FI		21	-2	78	1	1
SE		22	-3	77	2	1
UK		31	-6	68	6	1
US		28	2	70	-4	2
CH		38	10	61	-11	1

Q2.5 Has your company introduced any of the following types of innovation since January 2013?
New or significantly improved organisational methods (%)

		Yes		No		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		34	-4	65	3	1
BE		40	-9	60	10	0
BG		34	-8	65	8	1
CZ		30	-8	69	8	1
DK		32	-6	67	6	1
DE		32	3	67	-4	1
EE		12	-7	87	7	1
IE		35	-7	65	8	0
EL		41	-2	58	1	1
ES		37	-5	63	5	0
FR		43	5	57	-3	0
HR		36	-12	64	12	0
IT		38	-6	62	6	0
CY		49	-1	50	0	1
LV		28	-9	72	9	0
LT		28	-2	71	3	1
LU		45	-3	53	1	2
HU		21	4	79	-4	0
MT		45	5	53	-7	2
NL		24	-4	76	5	0
AT		39	0	60	0	1
PL		32	-4	65	2	3
PT		47	-8	52	8	1
RO		41	1	59	-1	0
SI		47	16	51	-18	2
SK		32	1	66	-2	2
FI		16	-5	82	3	2
SE		17	-4	82	3	1
UK		22	-14	77	14	1
US		28	2	71	-3	1
CH		34	-7	65	6	1

Q2A Has your company introduced any of the following types of innovation since January 2013? (%)

		At least one innovation		No innovation at all	
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415
EU28		67	-5	33	5
BE		69	-4	31	4
BG		63	1	37	-1
CZ		73	-6	27	6
DK		81	-2	19	2
DE		67	-5	33	5
EE		50	6	50	-6
IE		67	-8	33	8
EL		68	-1	32	1
ES		66	-6	34	6
FR		71	2	29	-2
HR		64	-16	36	16
IT		66	-8	34	8
CY		74	-6	26	6
LV		61	-11	39	11
LT		58	-6	42	6
LU		67	-11	33	11
HU		58	3	42	-3
MT		83	4	17	-4
NL		63	-4	37	4
AT		75	-3	25	3
PL		69	-6	31	6
PT		73	-2	27	2
RO		72	6	28	-6
SI		74	9	26	-9
SK		69	-2	31	2
FI		54	-1	46	1
SE		52	-5	48	5
UK		57	-12	43	12
US		56	9	44	-9
CH		75	2	25	-2

Q2B Has your company introduced any of the following types of innovation since January 2013? (%)

		Goods or services innovators		Other innovators		Non-innovators	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415
EU28		56	-5	11	0	33	5
BE		60	3	9	-7	31	4
BG		57	8	6	-7	37	-1
CZ		65	-4	8	-2	27	6
DK		67	-5	14	2	19	3
DE		52	-7	15	2	33	5
EE		38	9	11	-4	51	-5
IE		55	-8	12	0	33	8
EL		60	-2	8	1	32	1
ES		52	-5	14	-1	34	6
FR		57	-2	14	4	29	-2
HR		55	-13	9	-3	36	16
IT		60	-4	6	-4	34	8
CY		62	-4	12	-2	26	6
LV		50	-4	11	-7	39	11
LT		48	-5	10	-1	42	6
LU		55	-13	12	2	33	11
HU		45	1	13	2	42	-3
MT		78	10	5	-5	17	-5
NL		53	-3	10	-1	37	4
AT		64	-3	11	0	25	3
PL		60	-6	9	0	31	6
PT		62	-3	11	1	27	2
RO		62	6	10	0	28	-6
SI		61	14	13	-5	26	-9
SK		57	-6	12	4	31	2
FI		45	-3	9	2	46	1
SE		45	-3	7	-2	48	5
UK		47	-14	10	2	43	12
US		45	5	11	4	44	-9
CH		63	4	12	-2	25	-2

Q3 Approximately what percentage of your company's turnover in 2015 was due to innovative goods or services that have been introduced since January 2013? (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		0%			Between 1 and 5%			Between 6 and 10%			Between 11 and 25%		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415
EU28		10	1	21	-1	20	-1	21	1				
BE		8	3	20	-11	22	2	22	-1				
BG		8	-7	24	9	21	-2	20	-2				
CZ		9	1	17	-4	21	-1	20	-3				
DK		11	2	15	2	19	-1	18	2				
DE		9	2	14	-5	23	-1	27	5				
EE		15	4	26	4	15	1	15	-1				
IE		11	3	18	-1	27	4	25	-2				
EL		11	-1	18	4	24	5	22	-4				
ES		7	-1	31	5	18	-3	23	3				
FR		9	1	27	6	21	-5	22	-1				
HR		10	-5	26	5	25	-2	23	5				
IT		13	2	22	-8	17	-2	21	2				
CY		9	-11	12	-5	18	-1	25	10				
LV		10	3	31	9	19	-6	17	-2				
LT		9	2	18	-14	18	-6	13	-1				
LU		8	3	16	-5	18	-9	28	5				
HU		12	1	18	-3	27	3	24	-1				
MT		4	-4	20	-8	23	7	15	-13				
NL		11	2	20	-2	21	-3	24	6				
AT		7	6	22	6	16	-10	20	5				
PL		9	0	20	-2	25	10	18	1				
PT		12	2	18	-3	21	-1	19	-1				
RO		10	5	22	3	22	-4	21	-4				
SI		14	-4	26	7	19	-12	18	4				
SK		10	2	18	2	13	-10	23	3				
FI		8	1	23	1	13	-5	24	11				
SE		10	-2	18	8	21	-5	17	0				
UK		9	-1	14	-3	21	1	20	0				
US		14	-3	19	4	25	9	17	-5				
CH		4	-2	17	-14	33	11	21	2				

Q3 Approximately what percentage of your company's turnover in 2015 was due to innovative goods or services that have been introduced since January 2013? (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		Between 26 and 50%		51% or more		Don't know	Between 1 and 25%		26% or more	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415		FL433	FL433	Diff. FL433-FL415	FL433
EU28		10	1	7	-2	11	62	-1	17	-1
BE		11	1	5	1	12	64	-10	16	2
BG		9	4	8	-2	10	65	5	17	2
CZ		19	6	8	1	6	58	-8	27	7
DK		15	1	11	-2	11	52	3	26	-1
DE		10	2	9	2	8	64	-1	19	4
EE		5	-5	7	-2	17	56	4	12	-7
IE		8	-4	7	0	4	70	1	15	-4
EL		11	-3	11	-1	3	64	5	22	-4
ES		7	-1	5	-1	9	72	5	12	-2
FR		10	2	5	-4	6	70	0	15	-2
HR		5	-3	5	1	6	74	8	10	-2
IT		4	-5	4	-2	19	60	-8	8	-7
CY		8	1	21	14	7	55	4	29	15
LV		8	-2	8	-2	7	67	1	16	-4
LT		22	14	11	6	9	49	-21	33	20
LU		11	3	10	0	9	62	-9	21	3
HU		10	1	7	1	2	69	-1	17	2
MT		14	7	7	2	17	58	-14	21	9
NL		3	-10	11	2	10	65	1	14	-8
AT		10	1	9	-2	16	58	1	19	-1
PL		13	1	7	-6	8	63	9	20	-5
PT		9	2	4	-3	17	58	-5	13	-1
RO		14	0	6	0	5	65	-5	20	0
SI		10	-1	4	1	9	63	-1	14	0
SK		12	-4	14	7	10	54	-5	26	3
FI		9	-3	16	-5	7	60	7	25	-8
SE		15	-3	11	-2	8	56	3	26	-5
UK		12	7	10	-1	14	55	-2	22	6
US		4	-9	16	6	5	61	8	20	-3
CH		7	-1	9	7	9	71	-1	16	6

Q4.1 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Training (%)

		0%		Less than 1%			1 - 5 %			More than 5%		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	
EU28		39	6	17	-2	31	-3	11	0	2		
BE		33	4	16	-12	38	8	12	2	1		
BG		49	0	12	-2	24	2	13	1	2		
CZ		29	-7	32	6	29	1	7	0	3		
DK		35	-1	22	2	29	0	10	-2	4		
DE		23	-3	18	-2	40	2	15	3	4		
EE		43	5	25	-5	23	-2	7	2	2		
IE		29	-1	21	2	37	0	13	2	0		
EL		48	-6	18	3	22	0	11	4	1		
ES		32	5	15	-6	38	-5	13	5	2		
FR		36	2	20	1	34	2	8	-6	2		
HR		32	7	24	3	31	-8	12	-1	1		
IT		48	14	14	-3	27	-8	10	-2	1		
CY		31	-3	17	5	30	-8	19	6	3		
LV		41	-1	20	-2	30	2	8	2	1		
LT		52	8	24	4	17	-11	5	0	2		
LU		30	1	19	-2	34	0	9	-6	8		
HU		49	-4	19	0	28	9	3	-3	1		
MT		32	-5	22	-4	31	5	11	4	4		
NL		47	11	15	2	27	-5	10	-6	1		
AT		26	2	20	-1	40	6	11	-3	3		
PL		45	3	19	3	26	-6	9	0	1		
PT		41	11	15	-1	27	-7	13	-3	4		
RO		35	-4	17	-2	33	5	14	4	1		
SI		28	-3	30	-5	30	4	11	5	1		
SK		36	6	21	2	26	-7	12	-2	5		
FI		36	3	25	1	30	-3	8	-1	1		
SE		34	-2	16	0	39	1	9	1	2		
UK		47	16	13	-2	23	-11	12	-1	5		
US		42	-4	14	2	25	1	14	-2	5		
CH		27	1	19	1	37	-5	14	2	3		

Q4.2 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Software development (%)

		0%		Less than 1%		1 - 5 %		More than 5%		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		58	4	12	0	20	-1	8	-2	2
BE		48	6	15	-3	23	-2	13	1	1
BG		71	3	9	0	14	1	4	-2	2
CZ		68	2	11	1	12	0	8	-1	1
DK		49	-2	15	2	19	0	13	0	4
DE		59	5	13	4	15	-9	9	-1	4
EE		55	-8	20	5	16	2	6	1	3
IE		57	3	17	6	17	-5	8	-1	1
EL		42	-6	15	4	30	4	13	1	0
ES		47	-5	14	2	27	3	10	-1	2
FR		67	2	9	0	16	2	7	-2	1
HR		39	4	19	-1	28	3	13	-5	1
IT		52	11	11	-4	27	-5	8	-2	2
CY		49	-9	15	7	24	-1	7	0	5
LV		74	1	9	-1	10	0	5	-1	2
LT		69	-2	12	1	11	-2	6	4	2
LU		51	3	14	5	18	-4	9	-9	8
HU		44	-9	20	5	25	2	7	1	4
MT		46	-7	11	2	15	-7	21	11	7
NL		63	3	6	-4	18	4	10	-4	3
AT		61	3	9	-6	18	3	8	1	4
PL		52	2	17	1	24	3	6	-4	1
PT		59	11	10	1	21	-4	7	-3	3
RO		57	-11	13	2	22	9	7	3	1
SI		41	-2	21	-9	24	3	12	7	2
SK		69	6	10	3	8	-5	9	-3	4
FI		60	3	13	0	22	5	4	-8	1
SE		66	1	10	2	10	-7	11	4	3
UK		67	13	11	-1	11	-4	7	-2	4
US		59	-11	13	4	16	4	6	-1	6
CH		57	-7	10	-3	21	7	8	1	4

Q4.3 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Company reputation and branding, including web design (%)

		0%		Less than 1%			1 - 5 %			More than 5%		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	
EU28		41	3	16	0	29	0	11	-3	3		
BE		26	-2	15	-9	39	3	17	7	3		
BG		51	0	11	-1	23	-2	14	6	1		
CZ		30	1	20	-3	32	1	15	2	3		
DK		26	-5	21	1	34	6	15	0	4		
DE		34	0	19	-1	31	-3	12	3	4		
EE		60	-1	18	2	13	-3	7	3	2		
IE		34	5	17	7	34	-5	14	-6	1		
EL		33	-2	18	2	33	0	16	2	0		
ES		36	-1	17	1	32	1	13	-2	2		
FR		33	3	15	1	35	6	15	-10	2		
HR		36	0	24	2	29	0	9	-2	2		
IT		58	6	11	0	22	-1	6	-4	3		
CY		38	-1	22	6	25	-1	10	-3	5		
LV		52	5	17	-4	20	1	9	-1	2		
LT		60	1	13	-4	16	-2	8	4	3		
LU		27	1	12	-4	35	1	16	-6	10		
HU		42	-2	23	3	27	3	6	-3	2		
MT		27	-17	10	-10	23	4	32	20	8		
NL		35	2	16	1	31	-9	14	3	4		
AT		35	2	18	0	29	0	14	0	4		
PL		44	5	22	3	23	-7	9	0	2		
PT		61	9	7	-2	19	0	8	-5	5		
RO		46	-8	17	5	26	4	9	2	2		
SI		35	-6	25	-6	25	3	11	7	4		
SK		40	9	15	-1	20	-11	19	1	6		
FI		44	4	20	4	27	-5	8	-2	1		
SE		44	0	10	-7	31	5	10	0	5		
UK		35	8	15	0	35	3	12	-7	3		
US		38	-6	9	-6	25	1	21	7	7		
CH		28	-4	15	-5	38	2	15	7	4		

Q4.4 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Research and development (R&D) (%)

		0%		Less than 1%			1 - 5 %			More than 5%		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	
EU28		69	4	9	1	13	-1	7	-2	2		
BE		64	8	10	-2	16	-6	9	2	1		
BG		79	4	6	0	10	3	3	-4	2		
CZ		76	1	5	0	9	-3	8	5	2		
DK		61	6	9	-1	16	2	10	-4	4		
DE		74	3	6	0	10	0	6	-4	4		
EE		82	-4	3	-1	7	4	4	0	4		
IE		63	13	14	-1	16	-5	6	-5	1		
EL		60	2	10	4	19	-2	11	-2	0		
ES		74	-3	7	2	13	0	4	0	2		
FR		73	4	8	0	9	-5	8	1	2		
HR		59	7	13	0	18	-2	9	-2	1		
IT		64	11	10	-2	15	-6	8	-3	3		
CY		55	-3	13	6	25	1	4	-4	3		
LV		74	4	9	0	11	-4	5	0	1		
LT		89	0	6	2	3	0	1	-1	1		
LU		61	-1	11	3	15	-1	3	-6	10		
HU		76	-2	8	1	9	0	4	1	3		
MT		51	-13	13	3	20	5	8	1	8		
NL		52	-1	14	3	19	1	13	-3	2		
AT		67	-4	9	1	11	4	9	0	4		
PL		70	4	10	2	16	3	2	-7	2		
PT		77	9	3	-4	13	1	4	-4	3		
RO		67	-2	8	0	14	2	8	1	3		
SI		49	-3	19	-5	18	1	10	5	4		
SK		80	5	4	0	6	-2	6	-3	4		
FI		63	2	12	1	15	-2	9	-1	1		
SE		76	1	5	-2	8	-1	8	1	3		
UK		64	11	10	-1	14	-1	8	-3	4		
US		61	-4	10	-1	14	1	9	0	6		
CH		66	2	9	-2	12	-2	10	3	3		

Q4.5 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Design of products and services (%)

		0%		Less than 1%		1 - 5 %		More than 5%		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		54	3	10	-1	20	-1	12	0	4
BE		50	6	11	-2	20	-5	15	2	4
BG		62	1	4	-1	18	3	11	-4	5
CZ		46	0	16	-1	23	1	12	1	3
DK		40	4	17	2	23	5	16	-3	4
DE		48	-8	12	2	22	1	12	3	6
EE		71	-2	10	1	11	4	6	0	2
IE		49	5	14	3	22	-5	13	-1	2
EL		49	0	13	4	23	2	15	-4	0
ES		55	-1	10	-4	25	4	8	0	2
FR		55	1	14	7	18	-4	11	-4	2
HR		57	5	15	2	20	-2	6	-4	2
IT		57	7	8	-1	19	-5	13	0	3
CY		47	-12	12	3	25	8	10	-2	6
LV		57	2	13	0	19	-4	9	2	2
LT		71	4	10	-1	10	-2	7	1	2
LU		46	4	13	3	21	-3	15	-5	5
HU		56	-5	12	5	21	7	6	-6	5
MT		38	-16	5	-3	34	12	15	4	8
NL		48	0	11	2	21	1	15	-5	5
AT		46	5	12	-1	27	3	10	-4	5
PL		64	4	10	3	16	-5	7	-1	3
PT		55	13	3	-5	19	-5	17	2	6
RO		51	-2	10	-2	25	7	11	-2	3
SI		52	0	17	-1	16	-2	9	-1	6
SK		46	-5	10	1	19	-3	19	7	6
FI		45	-1	15	3	28	4	10	-7	2
SE		51	0	9	2	18	-2	17	0	5
UK		59	14	8	-6	16	-4	11	1	6
US		55	-3	9	-1	15	0	15	-1	6
CH		42	-3	11	-2	25	-1	19	6	3

Q4.6 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Organisation or business process improvements (%)

		0%		Less than 1%		1 - 5 %		More than 5%		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		45	2	14	0	27	-2	11	1	3
BE		39	8	12	-9	32	2	16	3	1
BG		42	-10	9	0	32	7	13	3	4
CZ		41	-2	17	-3	28	2	10	3	4
DK		44	0	16	1	24	2	12	1	4
DE		37	-6	16	-1	30	0	12	6	5
EE		62	-4	11	2	16	3	7	-1	4
IE		39	0	18	5	33	1	10	-2	0
EL		37	-5	16	5	33	4	14	-1	0
ES		41	6	17	2	27	-11	12	1	3
FR		47	3	11	-1	27	-5	11	1	4
HR		40	2	17	1	31	1	10	-3	2
IT		49	7	8	-4	31	-2	10	0	2
CY		31	-14	13	5	42	12	11	-6	3
LV		43	4	19	0	28	-5	8	1	2
LT		59	3	16	-1	15	-3	6	0	4
LU		35	0	15	-3	30	-2	11	-2	9
HU		46	-9	18	2	27	6	6	0	3
MT		25	-16	10	-1	41	8	15	4	9
NL		46	0	15	1	23	-2	12	0	4
AT		40	5	16	-3	29	3	10	-2	5
PL		55	5	17	3	22	-5	4	-3	2
PT		41	9	11	1	33	0	13	-5	2
RO		39	-6	16	5	26	1	16	1	3
SI		31	-8	29	-1	25	0	11	7	4
SK		41	-1	13	0	23	-1	19	7	4
FI		47	-6	22	6	22	2	8	-2	1
SE		57	3	10	2	20	-2	9	-4	4
UK		55	11	15	0	17	-4	9	-2	4
US		42	-6	9	-3	25	3	17	1	7
CH		35	1	14	-10	34	6	12	0	5

Q4.7 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Acquisition of machines, equipment, software or licenses (%)

		0%		Less than 1%		1 - 5 %		More than 5%		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		30	3	14	0	33	-1	21	-1	2
BE		19	-4	14	-2	38	7	28	1	1
BG		36	-7	10	4	29	6	23	-2	2
CZ		27	2	14	-1	33	1	23	-1	3
DK		19	-1	16	-1	34	1	27	3	4
DE		15	-3	13	2	36	-1	32	1	4
EE		33	1	15	-2	29	1	20	-1	3
IE		28	4	18	6	35	-1	19	-5	0
EL		33	-4	12	3	36	4	19	-1	0
ES		27	-5	12	-2	38	4	21	1	2
FR		35	-1	20	8	26	-7	18	0	1
HR		25	0	15	-2	32	-1	26	3	2
IT		41	11	14	-4	33	-2	11	-4	1
CY		34	0	11	-1	33	1	17	-2	5
LV		34	2	17	3	28	-3	20	-1	1
LT		38	-3	19	4	21	-4	19	5	3
LU		24	3	17	5	29	-7	23	-4	7
HU		21	-7	14	-2	36	3	26	6	3
MT		35	1	11	-7	26	0	24	7	4
NL		35	-2	16	6	31	-2	15	-3	3
AT		24	10	14	0	34	-4	25	-1	3
PL		26	-1	12	-1	36	6	25	-4	1
PT		31	9	10	-4	32	-3	24	2	3
RO		28	-12	11	3	32	11	28	2	1
SI		16	-5	18	-8	38	7	27	7	1
SK		20	-5	11	0	28	0	35	4	6
FI		21	2	15	0	36	-1	28	0	0
SE		22	2	16	0	39	5	20	-7	3
UK		36	12	11	0	29	-9	19	-1	5
US		30	-8	13	1	31	2	21	2	5
CH		17	-2	14	-3	38	-2	28	7	3

Q4B.1 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Training (%)

		No investment		Some investment		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		39	6	59	-5	2
BE		33	4	66	-3	1
BG		49	-1	49	2	2
CZ		29	-7	68	7	3
DK		35	-1	61	0	4
DE		23	-3	73	3	4
EE		42	4	56	-4	2
IE		29	-1	71	4	0
EL		48	-6	51	7	1
ES		32	6	66	-7	2
FR		36	2	62	-3	2
HR		32	7	67	-6	1
IT		48	14	51	-13	1
CY		31	-3	66	2	3
LV		41	-1	58	2	1
LT		52	9	46	-8	2
LU		30	1	62	-8	8
HU		49	-4	50	6	1
MT		32	-5	64	5	4
NL		47	11	52	-9	1
AT		26	2	71	2	3
PL		45	3	55	-2	0
PT		41	11	55	-11	4
RO		35	-4	64	7	1
SI		28	-3	71	4	1
SK		36	6	59	-7	5
FI		36	3	63	-3	1
SE		34	-2	64	2	2
UK		47	16	49	-13	4
US		42	-4	53	1	5
CH		27	1	70	-2	3

Q4B.2 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Software development (%)

		No investment		Some investment		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		58	4	40	-3	2
BE		48	6	51	-4	1
BG		71	3	27	-1	2
CZ		68	2	31	0	1
DK		49	-2	47	2	4
DE		59	5	37	-6	4
EE		55	-8	42	8	3
IE		57	3	42	0	1
EL		43	-5	57	8	0
ES		47	-5	51	4	2
FR		67	2	32	-1	1
HR		39	4	60	-3	1
IT		52	10	46	-10	2
CY		49	-9	46	7	5
LV		74	1	24	-2	2
LT		69	-2	29	3	2
LU		51	3	41	-8	8
HU		44	-9	52	8	4
MT		46	-7	47	6	7
NL		63	3	34	-4	3
AT		61	3	35	-2	4
PL		52	2	47	-1	1
PT		60	12	37	-7	3
RO		57	-11	43	15	0
SI		41	-2	57	1	2
SK		69	6	27	-5	4
FI		60	3	39	-3	1
SE		66	1	31	-1	3
UK		66	12	30	-6	4
US		59	-11	35	7	6
CH		57	-7	40	6	3

Q4B.3 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Company reputation and branding, including web design (%)

		No investment		Some investment		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		41	3	56	-3	3
BE		26	-2	71	1	3
BG		51	0	48	3	1
CZ		30	1	67	0	3
DK		26	-5	70	7	4
DE		34	0	62	-1	4
EE		60	-1	38	2	2
IE		34	5	65	-4	1
EL		33	-2	67	4	0
ES		36	-1	62	0	2
FR		33	3	65	-3	2
HR		36	0	62	0	2
IT		58	6	39	-5	3
CY		38	-1	57	2	5
LV		52	5	46	-4	2
LT		60	1	38	-1	2
LU		27	1	63	-9	10
HU		42	-2	56	3	2
MT		27	-17	65	14	8
NL		35	2	61	-5	4
AT		35	2	61	0	4
PL		44	5	53	-5	3
PT		61	9	34	-7	5
RO		46	-8	52	11	2
SI		35	-6	61	4	4
SK		40	9	54	-11	6
FI		44	4	55	-3	1
SE		44	0	51	-2	5
UK		35	7	62	-3	3
US		38	-6	55	2	7
CH		28	-4	68	4	4

Q4B.4 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Research and development (R&D) (%)

		No investment		Some investment		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		69	4	28	-3	3
BE		64	8	35	-6	1
BG		79	4	19	-1	2
CZ		76	2	22	1	2
DK		61	6	35	-2	4
DE		74	3	23	-3	3
EE		82	-4	14	3	4
IE		62	12	37	-10	1
EL		60	1	40	1	0
ES		74	-3	24	2	2
FR		73	4	25	-4	2
HR		59	7	40	-4	1
IT		64	11	33	-11	3
CY		55	-3	42	2	3
LV		74	4	25	-4	1
LT		89	0	10	1	1
LU		61	-1	29	-4	10
HU		76	-2	21	2	3
MT		51	-13	41	9	8
NL		52	-1	46	1	2
AT		67	-4	29	5	4
PL		70	4	28	-2	2
PT		77	9	20	-7	3
RO		67	-2	30	3	3
SI		49	-3	47	1	4
SK		80	5	16	-5	4
FI		63	2	36	-2	1
SE		76	1	21	-2	3
UK		64	12	32	-6	4
US		61	-4	33	0	6
CH		65	1	32	0	3

Q4B.5 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Design of products and services (%)

		No investment		Some investment		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		54	3	42	-2	4
BE		50	6	47	-4	3
BG		62	1	33	-2	5
CZ		46	0	51	1	3
DK		40	4	56	4	4
DE		48	-8	46	5	6
EE		71	-3	27	6	2
IE		49	4	49	-2	2
EL		49	0	50	1	1
ES		55	-1	43	0	2
FR		55	1	43	-1	2
HR		57	5	41	-4	2
IT		57	7	40	-6	3
CY		47	-12	47	10	6
LV		57	2	41	-2	2
LT		71	3	27	-1	2
LU		46	4	49	-5	5
HU		56	-5	39	6	5
MT		38	-15	54	12	8
NL		48	0	47	-2	5
AT		46	5	49	-2	5
PL		64	4	33	-3	3
PT		55	13	39	-8	6
RO		51	-2	46	3	3
SI		51	-1	43	-3	6
SK		46	-5	48	5	6
FI		45	-1	54	1	1
SE		51	0	44	1	5
UK		59	14	35	-9	6
US		55	-3	39	-2	6
CH		42	-3	55	3	3

Q4B.6 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Organisation or business process improvements (%)

		No investment		Some investment		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		46	3	51	-2	3
BE		39	8	59	-5	2
BG		42	-10	54	10	4
CZ		41	-2	55	2	4
DK		44	0	51	3	5
DE		37	-6	58	5	5
EE		62	-4	34	4	4
IE		39	0	61	4	0
EL		37	-5	63	8	0
ES		41	6	56	-8	3
FR		47	3	49	-5	4
HR		40	2	57	-2	3
IT		49	7	49	-6	2
CY		31	-14	66	11	3
LV		43	4	55	-4	2
LT		59	3	37	-4	4
LU		35	0	57	-6	8
HU		46	-9	51	8	3
MT		25	-16	65	10	10
NL		46	0	50	-1	4
AT		40	5	55	-2	5
PL		55	5	43	-5	2
PT		41	9	57	-4	2
RO		39	-6	58	7	3
SI		31	-8	65	6	4
SK		41	-1	55	6	4
FI		47	-6	52	7	1
SE		57	2	39	-3	4
UK		55	10	41	-5	4
US		42	-6	51	2	7
CH		35	1	60	-4	5

Q4B.7 Since January 2013, what percentage of its total turnover has your company invested in each of the following activities?

Acquisition of machines, equipment, software or licenses (%)

		No investment		Some investment		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		30	3	68	-2	2
BE		19	-4	80	6	1
BG		36	-7	62	8	2
CZ		27	2	70	-1	3
DK		19	-2	77	4	4
DE		15	-3	81	3	4
EE		33	1	64	-2	3
IE		28	4	72	0	0
EL		33	-4	67	6	0
ES		26	-6	72	4	2
FR		35	-1	64	1	1
HR		25	0	73	0	2
IT		41	11	58	-10	1
CY		34	0	61	-2	5
LV		34	2	65	-1	1
LT		38	-3	59	5	3
LU		24	3	69	-6	7
HU		21	-7	75	6	4
MT		35	1	61	0	4
NL		35	-2	62	1	3
AT		24	10	73	-5	3
PL		26	-1	73	1	1
PT		31	9	66	-5	3
RO		28	-12	71	16	1
SI		16	-5	83	6	1
SK		20	-5	74	4	6
FI		21	2	78	-2	1
SE		22	2	75	-3	3
UK		36	12	59	-10	5
US		29	-9	66	6	5
CH		17	-2	79	1	4

Q5A.1 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Lack of human resources (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem		A minor problem		Not a problem at all		Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415	FL415
EU28		23	4	26	-1	50	-3	1	49		3
BE		26	3	34	3	39	-6	1	60		6
BG		54	9	12	1	34	-9	0	66		10
CZ		37	6	33	9	30	-14	0	70		15
DK		18	9	24	2	57	-11	1	42		11
DE		24	6	28	-4	47	-3	1	52		2
EE		22	-2	33	0	45	4	0	55		-2
IE		15	6	38	1	46	-6	1	53		7
EL		21	5	26	-11	53	6	0	47		-6
ES		12	0	28	-1	58	-1	2	40		-1
FR		33	5	25	-2	40	-4	2	58		3
HR		30	13	24	-7	45	-7	1	54		6
IT		18	4	21	-2	61	-1	0	39		2
CY		4	-13	25	6	69	5	2	29		-7
LV		32	0	32	0	36	0	0	64		0
LT		35	9	22	-5	43	-2	0	57		4
LU		18	-17	25	-2	55	17	2	43		-19
HU		36	6	29	4	35	-10	0	65		10
MT		29	18	32	-8	39	-10	0	61		10
NL		6	-6	17	4	77	2	0	23		-2
AT		18	0	30	0	52	2	0	48		0
PL		33	5	32	0	32	-6	3	65		5
PT		23	-12	21	6	54	4	2	44		-6
RO		27	10	26	-6	46	-5	1	53		4
SI		23	9	29	-3	46	-8	2	52		6
SK		29	6	27	3	42	-10	2	56		9
FI		12	1	38	9	50	-10	0	50		10
SE		19	5	33	7	48	-11	0	52		12
UK		14	3	22	-11	63	10	1	36		-8
US		9	3	24	-1	67	2	0	33		2
CH		20	3	25	4	54	-7	1	45		7

Q5A.2 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Lack of financial resources (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem		A minor problem		Not a problem at all		Don't know	Total 'A problem'	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415
EU28		30	-2	28	0	41	2	1	58	-2
BE		22	10	21	-8	57	-1	0	43	2
BG		51	-2	19	4	29	-3	1	70	2
CZ		14	-13	47	12	38	1	1	61	-1
DK		12	-2	30	3	57	-1	1	42	1
DE		16	1	32	6	50	-9	2	48	7
EE		15	-10	45	7	39	2	1	60	-3
IE		28	-4	37	3	34	0	1	65	-1
EL		47	-5	37	8	16	-3	0	84	3
ES		22	-15	30	2	47	12	1	52	-13
FR		40	-2	27	-3	33	7	0	67	-5
HR		48	6	31	-5	21	1	0	79	1
IT		42	-4	17	-5	38	6	3	59	-9
CY		34	-13	27	2	37	11	2	61	-11
LV		34	-4	33	-3	32	7	1	67	-7
LT		25	-2	31	-8	43	12	1	56	-10
LU		22	0	22	-18	54	17	2	44	-18
HU		27	-3	26	-7	47	11	0	53	-10
MT		14	0	29	-10	55	8	2	43	-10
NL		18	-4	31	7	51	-3	0	49	3
AT		13	0	29	-5	58	6	0	42	-5
PL		31	-3	37	-3	31	6	1	68	-6
PT		47	-9	22	-1	31	10	0	69	-10
RO		30	-9	27	-1	41	8	2	57	-10
SI		35	15	27	-6	36	-11	2	62	9
SK		33	7	42	1	25	-7	0	75	8
FI		25	-4	31	-4	44	8	0	56	-8
SE		15	-10	21	2	64	8	0	36	-8
UK		16	-4	29	2	54	5	1	45	-2
US		12	3	27	2	61	-2	0	39	5
CH		16	1	38	14	46	-14	0	54	15

Q5A.3 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Finding or using new technologies (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem		A minor problem		Not a problem at all		Don't know	Total 'A problem'	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415
EU28		10	2	25	0	63	-2	2	35	2
BE		15	10	28	-12	55	3	2	43	-2
BG		13	1	26	3	60	-3	1	39	4
CZ		3	0	33	10	60	-9	4	36	10
DK		6	5	30	7	63	-11	1	36	12
DE		4	0	16	-8	77	7	3	20	-8
EE		0	-3	24	4	73	-1	3	24	1
IE		6	0	35	6	59	-3	0	41	6
EL		10	-1	35	0	54	1	1	45	-1
ES		7	1	27	-1	66	0	0	34	0
FR		20	5	33	3	46	-7	1	53	8
HR		7	3	22	0	69	-3	2	29	3
IT		16	3	22	4	60	-8	2	38	7
CY		13	-5	21	3	66	2	0	34	-2
LV		5	0	32	3	61	-2	2	37	3
LT		6	4	25	-1	69	6	0	31	3
LU		7	-4	24	-3	69	8	0	31	-7
HU		6	-1	17	-4	75	3	2	23	-5
MT		3	-3	28	-2	67	5	2	31	-5
NL		3	-1	20	-2	76	3	1	23	-3
AT		5	0	20	-6	74	8	1	25	-6
PL		8	0	39	6	49	-7	4	47	6
PT		7	-32	21	1	71	31	1	28	-31
RO		10	2	17	-2	71	2	2	27	0
SI		2	-2	27	1	69	0	2	29	-1
SK		4	0	26	-6	64	6	6	30	-6
FI		4	1	31	1	65	-2	0	35	2
SE		2	0	19	-7	77	5	2	21	-7
UK		5	0	16	-10	78	13	1	21	-10
US		3	1	26	4	70	-4	1	29	5
CH		8	-1	32	4	59	-1	1	40	3

Q5A.4 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Cost or complexity of meeting regulations or standards (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem		A minor problem		Not a problem at all		Don't know	Total 'A problem'	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415
EU28		27	0	30	0	42	1	1	57	0
BE		21	1	25	-6	52	3	2	46	-5
BG		28	1	28	6	39	-2	5	56	7
CZ		20	-2	44	5	36	1	0	64	3
DK		10	-1	27	3	61	-1	2	37	2
DE		23	0	36	4	39	-5	2	59	4
EE		1	-7	32	1	66	5	1	33	-6
IE		22	4	50	14	28	-17	0	72	18
EL		21	1	37	0	39	-4	3	58	1
ES		20	1	33	-7	45	4	2	53	-6
FR		49	-7	26	5	24	3	1	75	-2
HR		45	18	28	-6	26	-12	1	73	12
IT		30	0	24	-3	44	2	2	54	-3
CY		16	-18	39	12	45	9	0	55	-6
LV		14	2	46	6	39	-6	1	60	8
LT		5	-2	24	-6	67	6	4	29	-8
LU		26	-5	32	3	40	1	2	58	-2
HU		36	3	25	-8	37	5	2	61	-5
MT		12	-3	35	9	53	-1	0	47	6
NL		18	1	32	4	50	-4	0	50	5
AT		29	13	37	8	34	-19	0	66	21
PL		32	-5	41	-2	25	6	2	73	-7
PT		35	-18	18	4	46	17	1	53	-14
RO		13	2	28	-3	59	3	0	41	-1
SI		25	3	38	3	35	-8	2	63	6
SK		29	-7	34	2	35	5	2	63	-5
FI		11	-3	28	-9	61	12	0	39	-12
SE		13	-1	28	2	58	-1	1	41	1
UK		8	-1	24	-7	66	13	2	32	-8
US		5	-7	30	12	62	-7	3	35	5
CH		23	5	36	0	39	-5	2	59	5

Q5A.5 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Difficulties in maintaining intellectual property rights (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem				A minor problem				Not a problem at all				Don't know	Total 'A problem'			
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415			
EU28		8	1	15	1	72	-1	5	23	2								
BE		8	4	13	-3	75	1	4	21	1								
BG		22	9	16	-2	57	-6	5	38	7								
CZ		6	1	19	4	73	1	2	25	5								
DK		2	-1	13	6	76	-4	9	15	5								
DE		8	1	16	1	72	-4	4	24	2								
EE		2	1	8	-1	82	-3	8	10	0								
IE		6	4	18	4	72	-3	4	24	8								
EL		8	-2	17	2	69	-3	6	25	0								
ES		4	1	13	1	78	-5	5	17	2								
FR		10	-3	21	6	65	0	4	31	3								
HR		7	1	14	5	79	-4	0	21	6								
IT		11	3	11	-2	73	-3	5	22	1								
CY		10	0	9	-6	80	6	1	19	-6								
LV		3	-5	17	3	75	2	5	20	-2								
LT		4	-3	17	1	78	7	1	21	-2								
LU		7	-2	22	1	71	5	0	29	-1								
HU		6	-2	13	-4	75	4	6	19	-6								
MT		0	-5	26	14	71	-4	3	26	9								
NL		6	-2	13	0	77	0	4	19	-2								
AT		11	3	14	0	74	-2	1	25	3								
PL		7	-1	25	1	60	1	8	32	0								
PT		8	-17	11	-4	78	22	3	19	-21								
RO		4	0	9	-6	83	5	4	13	-6								
SI		7	3	13	-6	76	0	4	20	-3								
SK		7	-4	16	-2	72	5	5	23	-6								
FI		4	3	15	-5	75	-3	6	19	-2								
SE		7	-2	18	7	70	-1	5	25	5								
UK		1	0	7	-8	84	12	8	8	-8								
US		2	1	12	0	80	-1	6	14	1								
CH		9	3	24	1	65	-4	2	33	4								

Q5A.6 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Administrative or legal issues (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem		A minor problem		Not a problem at all		Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415	FL415
EU28		16	-1	30	1	53	0	1	46	0	
BE		14	3	35	-1	51	1	0	49	2	
BG		31	1	27	4	41	-6	1	58	5	
CZ		18	3	39	1	42	-4	1	57	4	
DK		6	-2	32	12	60	-11	2	38	10	
DE		10	2	31	-3	57	0	2	41	-1	
EE		1	-3	25	2	74	1	0	26	-1	
IE		8	5	38	12	52	-18	2	46	17	
EL		16	5	42	7	41	-13	1	58	12	
ES		8	-5	33	-1	59	6	0	41	-6	
FR		37	-1	29	0	34	2	0	66	-1	
HR		36	8	39	13	25	-19	0	75	21	
IT		15	-6	28	5	56	0	1	43	-1	
CY		10	-1	27	-4	63	6	0	37	-5	
LV		8	0	46	11	46	-11	0	54	11	
LT		6	-3	28	-2	66	6	0	34	-5	
LU		21	2	32	-4	45	0	2	53	-2	
HU		21	1	26	0	53	-1	0	47	1	
MT		6	-1	34	15	60	-14	0	40	14	
NL		8	-2	24	0	68	2	0	32	-2	
AT		10	2	38	9	52	-10	0	48	11	
PL		18	-5	46	7	34	-4	2	64	2	
PT		18	-23	22	8	58	13	2	40	-15	
RO		9	-2	18	-7	72	8	1	27	-9	
SI		8	-1	33	8	58	-8	1	41	7	
SK		24	-5	31	-2	43	6	2	55	-7	
FI		6	3	22	-1	72	-2	0	28	2	
SE		8	5	26	-1	65	-4	1	34	4	
UK		4	-1	18	-11	77	14	1	22	-12	
US		3	-1	21	2	75	2	1	24	1	
CH		9	-4	36	8	54	-4	1	45	4	

Q5A.7 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Lack of marketing expertise (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem		A minor problem		Not a problem at all		Don't know	Total 'A problem'	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415
EU28		10	0	31	2	58	-2	1	41	2
BE		15	2	29	0	56	-1	0	44	2
BG		20	4	30	5	48	-10	2	50	9
CZ		8	1	35	1	56	1	1	43	2
DK		9	3	28	2	62	-4	1	37	5
DE		3	1	32	9	64	-10	1	35	10
EE		3	-3	32	-8	65	13	0	35	-11
IE		14	2	44	-7	42	5	0	58	-5
EL		16	1	37	14	46	-16	1	53	15
ES		10	2	35	2	55	-4	0	45	4
FR		12	-6	35	4	52	3	1	47	-2
HR		4	-2	36	7	60	-5	0	40	5
IT		12	0	26	3	62	-3	0	38	3
CY		16	8	23	-1	61	-7	0	39	7
LV		7	-7	43	0	50	8	0	50	-7
LT		10	-1	28	-11	61	13	1	38	-12
LU		12	2	31	-6	52	-1	5	43	-4
HU		15	8	26	4	58	-12	1	41	12
MT		0	-7	32	7	66	-2	2	32	0
NL		11	1	29	-1	60	0	0	40	0
AT		4	-1	27	-6	69	10	0	31	-7
PL		15	7	42	5	42	-11	1	57	12
PT		10	-22	24	-1	62	20	4	34	-23
RO		9	-1	22	-9	68	10	1	31	-10
SI		6	1	30	-1	61	-2	3	36	0
SK		9	1	41	3	47	-2	3	50	4
FI		9	2	26	-15	65	13	0	35	-13
SE		11	2	24	5	64	-8	1	35	7
UK		5	-5	27	-4	66	10	2	32	-9
US		4	0	29	4	66	-2	1	33	4
CH		7	4	27	3	65	-6	1	34	7

Q5A.8 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Market dominated by established competitors (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	
EU28		29	0	36	0	34	0	1	65	0				
BE		23	-1	34	-11	42	12	1	57	-12				
BG		32	-12	31	9	37	6	0	63	-3				
CZ		26	-6	46	10	28	-2	0	72	4				
DK		23	2	41	7	35	-9	1	64	9				
DE		18	-1	34	0	46	0	2	52	-1				
EE		24	3	42	-13	34	10	0	66	-10				
IE		26	5	43	-2	31	-2	0	69	3				
EL		32	1	44	6	22	-8	2	76	7				
ES		30	-4	38	2	32	2	0	68	-2				
FR		36	2	41	-3	23	2	0	77	-1				
HR		31	10	28	-8	41	-1	0	59	2				
IT		34	-1	30	2	35	-2	1	64	1				
CY		38	-17	41	15	21	2	0	79	-2				
LV		34	13	48	0	18	-13	0	82	13				
LT		30	-9	27	-5	42	14	1	57	-14				
LU		35	5	28	-17	33	9	4	63	-12				
HU		29	-7	37	14	34	-7	0	66	7				
MT		34	-3	32	3	34	0	0	66	0				
NL		25	3	36	-4	39	1	0	61	-1				
AT		15	-10	42	15	43	-2	0	57	5				
PL		36	-1	44	3	20	-1	0	80	2				
PT		50	6	24	-3	26	-1	0	74	3				
RO		23	-8	38	4	36	2	3	61	-4				
SI		16	-2	36	-3	47	4	1	52	-5				
SK		24	-7	38	6	32	-2	6	62	-1				
FI		12	-7	43	10	45	-2	0	55	3				
SE		16	0	37	-4	46	3	1	53	-4				
UK		13	-5	33	-7	53	13	1	46	-12				
US		14	3	29	0	57	0	0	43	3				
CH		26	-2	38	4	34	-3	2	64	2				

Q5A.9 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Low demand for your innovative goods or services (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem		A minor problem		Not a problem at all		Don't know	Total 'A problem'	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415
EU28		14	1	31	1	53	-1	2	45	2
BE		3	-4	30	3	65	3	2	33	-1
BG		19	-3	29	4	47	1	5	48	1
CZ		8	-5	34	1	56	6	2	42	-4
DK		6	-2	25	3	67	2	2	31	1
DE		8	1	35	9	56	-9	1	43	10
EE		5	-1	38	0	54	1	3	43	-1
IE		7	-2	40	3	52	1	1	47	1
EL		21	-8	35	7	43	0	1	56	-1
ES		18	4	32	-7	49	4	1	50	-3
FR		15	4	36	-4	46	-1	3	51	0
HR		12	1	33	-4	52	4	3	45	-3
IT		16	-2	26	0	55	1	3	42	-2
CY		22	-13	28	0	46	11	4	50	-13
LV		16	6	39	3	44	-4	1	55	9
LT		11	0	23	-12	65	14	1	34	-12
LU		8	-7	33	-1	56	5	3	41	-8
HU		15	0	22	-6	60	5	3	37	-6
MT		7	-7	15	-10	75	14	3	22	-17
NL		6	1	28	-1	64	0	2	34	0
AT		6	-4	29	1	63	3	2	35	-3
PL		16	5	40	2	36	-13	8	56	7
PT		31	-11	31	10	36	2	2	62	-1
RO		14	-3	34	1	51	1	1	48	-2
SI		14	6	34	8	49	-17	3	48	14
SK		13	-2	33	-8	52	12	2	46	-10
FI		10	-2	30	-7	60	10	0	40	-9
SE		5	-3	23	0	70	1	2	28	-3
UK		8	-4	25	3	66	4	1	33	-1
US		4	-3	27	6	68	-2	1	31	3
CH		11	4	37	4	52	-4	0	48	8

Q5A.10 Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Weak distribution channels (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		A major problem		A minor problem		Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415	FL415	
EU28		13	2	25	0	58	-3	4	38	2		
BE		11	6	22	0	66	-3	1	33	6		
BG		20	0	22	-1	51	0	7	42	-1		
CZ		8	-1	28	3	59	0	5	36	2		
DK		4	1	17	0	76	-1	3	21	1		
DE		10	3	28	-2	56	-7	6	38	1		
EE		2	-6	36	5	61	2	1	38	-1		
IE		5	-2	26	0	64	3	5	31	-2		
EL		15	-2	35	12	47	-5	3	50	10		
ES		17	11	29	5	51	-14	3	46	16		
FR		15	-4	36	6	46	-2	3	51	2		
HR		13	8	37	13	49	-19	1	50	21		
IT		18	1	17	-4	61	1	4	35	-3		
CY		13	-3	15	1	68	2	4	28	-2		
LV		13	-4	34	6	52	-1	1	47	2		
LT		4	-3	28	1	66	7	2	32	-2		
LU		8	-8	36	7	53	-2	3	44	-1		
HU		14	7	26	-2	57	-1	3	40	5		
MT		7	2	32	11	61	-3	0	39	13		
NL		3	-4	14	-1	81	5	2	17	-5		
AT		10	-4	26	-2	63	9	1	36	-6		
PL		13	3	33	-9	49	6	5	46	-6		
PT		18	-15	19	-3	60	18	3	37	-18		
RO		11	-4	17	-7	64	5	8	28	-11		
SI		8	0	24	2	64	-5	4	32	2		
SK		10	-1	27	3	55	-6	8	37	2		
FI		10	1	21	-4	69	3	0	31	-3		
SE		5	-7	15	-3	78	8	2	20	-10		
UK		4	-2	17	3	73	0	6	21	1		
US		3	-6	23	7	71	-1	3	26	1		
CH		13	7	26	-1	59	-6	2	39	6		

Q5AT Thinking about the commercialisation of your company's innovative goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all? (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		At least one major problem		At least one minor problem		Not a problem at all	
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415
EU28		68	2	85	0	6	0
BE		58	-1	84	-4	11	8
BG		85	-1	82	-1	6	4
CZ		67	-1	94	6	4	2
DK		49	1	87	6	7	-6
DE		59	0	87	-1	8	2
EE		47	-7	93	3	5	-2
IE		59	-2	98	6	2	-3
EL		74	2	95	3	2	0
ES		67	-3	83	-10	10	7
FR		84	1	89	3	1	-3
HR		80	10	87	-2	2	-2
IT		74	1	80	3	6	1
CY		55	-28	80	-3	9	5
LV		74	8	92	6	4	3
LT		66	2	80	-10	11	7
LU		57	-14	75	-18	20	19
HU		69	0	87	-2	5	4
MT		66	0	76	-16	12	12
NL		51	-5	79	-4	12	6
AT		54	1	89	5	9	-2
PL		72	-3	92	1	3	1
PT		87	-1	77	9	5	1
RO		63	-7	81	-1	8	0
SI		66	9	90	0	5	1
SK		72	0	91	3	6	2
FI		48	-4	88	-3	8	2
SE		49	-2	81	-1	6	-2
UK		39	-4	80	-4	14	2
US		32	-4	71	9	24	-8
CH		60	3	91	6	6	-1

Q5B.1 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Lack of human resources (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem		A minor problem		Not a problem at all		Don't know	Total 'A problem'	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415
EU28		14	3	21	0	64	-3	1	35	3
BE		18	10	20	-1	62	-8	0	38	9
BG		37	5	14	2	48	-3	1	51	7
CZ		28	12	27	8	44	-18	1	55	20
DK		10	-1	23	0	65	-1	2	33	-1
DE		11	-5	30	6	57	-3	2	41	1
EE		13	-3	29	8	58	-3	0	42	5
IE		6	0	25	-2	69	2	0	31	-2
EL		14	-5	23	5	61	-2	2	37	0
ES		5	0	18	4	77	-4	0	23	4
FR		24	2	19	-3	56	0	1	43	-1
HR		14	4	25	12	60	-17	1	39	16
IT		11	9	20	-4	69	-5	0	31	5
CY		10	6	27	3	63	-9	0	37	9
LV		17	-8	23	-4	60	12	0	40	-12
LT		24	1	23	2	51	0	2	47	3
LU		13	-9	15	-7	70	14	2	28	-16
HU		28	12	26	8	44	-18	2	54	20
MT		17	7	22	7	52	-23	9	39	14
NL		2	-1	11	4	86	-3	1	13	3
AT		12	-5	26	2	61	2	1	38	-3
PL		27	14	22	-5	49	-8	2	49	9
PT		11	-5	14	-6	72	8	3	25	-11
RO		27	13	17	-4	55	-7	1	44	9
SI		8	6	29	2	60	-11	3	37	8
SK		18	-4	23	-2	55	4	4	41	-6
FI		6	-3	23	3	71	0	0	29	0
SE		10	1	27	0	61	-1	2	37	1
UK		5	2	20	0	73	-3	2	25	2
US		4	-2	18	2	74	-2	4	22	0
CH		10	-5	22	-3	66	6	2	32	-8

Q5B.2 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Lack of financial resources (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	
EU28		24	0	25	1	50	-1	1	49	1				
BE		13	-4	22	9	65	-4	0	35	5				
BG		53	10	15	-7	32	-3	0	68	3				
CZ		17	4	29	-1	54	5	0	46	3				
DK		10	2	31	5	57	-9	2	41	7				
DE		9	-1	19	4	69	-5	3	28	3				
EE		12	-10	30	3	57	9	1	42	-7				
IE		24	2	36	7	39	-9	1	60	9				
EL		54	-4	25	2	21	2	0	79	-2				
ES		16	-3	28	2	56	1	0	44	-1				
FR		29	-6	26	-1	45	7	0	55	-7				
HR		43	-4	29	3	27	0	1	72	-1				
IT		44	2	21	-2	34	-1	1	65	0				
CY		33	-36	29	13	38	23	0	62	-23				
LV		21	-8	35	-1	44	10	0	56	-9				
LT		22	2	26	-10	50	7	2	48	-8				
LU		16	-10	16	-10	64	16	4	32	-20				
HU		29	3	25	-3	44	2	2	54	0				
MT		17	2	26	-1	57	-1	0	43	1				
NL		10	6	27	-2	63	-4	0	37	4				
AT		19	4	28	2	52	-7	1	47	6				
PL		30	0	44	13	26	-13	0	74	13				
PT		37	-20	14	-1	45	17	4	51	-21				
RO		37	-3	18	-5	43	6	2	55	-8				
SI		20	1	31	-8	48	6	1	51	-7				
SK		25	-1	40	5	34	-2	1	65	4				
FI		13	-3	30	0	57	3	0	43	-3				
SE		6	-3	17	-6	76	9	1	23	-9				
UK		12	3	20	5	65	-10	3	32	8				
US		4	-6	17	2	77	3	2	21	-4				
CH		12	-2	29	2	57	-2	2	41	0				

Q5B.3 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Finding or using new technologies (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	FL433	Diff. FL433-FL415	FL415
EU28		5	0	19	3	73	-3	3	24	3				
BE		4	1	14	-7	79	4	3	18	-6				
BG		10	0	16	6	66	-2	8	26	6				
CZ		4	4	17	4	75	-7	4	21	8				
DK		2	0	28	17	68	-18	2	30	17				
DE		3	0	16	2	75	-6	6	19	2				
EE		3	0	11	4	78	2	8	14	4				
IE		7	7	24	5	69	-9	0	31	12				
EL		5	0	16	-5	79	6	0	21	-5				
ES		2	-3	26	11	72	-8	0	28	8				
FR		12	6	21	-5	64	-1	3	33	1				
HR		5	2	15	1	76	-7	4	20	3				
IT		5	-5	24	12	68	-8	3	29	7				
CY		11	2	19	-5	70	7	0	30	-3				
LV		4	-3	18	-2	76	5	2	22	-5				
LT		6	2	11	-1	81	5	2	17	1				
LU		6	2	16	-11	72	3	6	22	-9				
HU		3	-1	16	5	74	-6	7	19	4				
MT		17	17	0	-13	83	-2	0	17	4				
NL		1	-1	14	2	81	-3	4	15	1				
AT		3	1	12	6	85	-5	0	15	7				
PL		6	-6	28	1	61	7	5	34	-5				
PT		10	3	11	-6	78	8	1	21	-3				
RO		8	-2	12	-8	76	10	4	20	-10				
SI		2	0	14	-6	80	3	4	16	-6				
SK		2	-1	25	6	62	-10	11	27	5				
FI		3	0	14	-6	83	6	0	17	-6				
SE		0	-1	16	1	83	1	1	16	0				
UK		2	2	13	-2	81	-1	4	15	0				
US		1	-1	18	7	80	-4	1	19	6				
CH		6	4	18	-5	74	0	2	24	-1				

Q5B.4 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Cost or complexity of meeting regulations or standards (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	FL433	Diff. FL433-FL415	FL415
EU28		19	0	29	2	50	-2	2	48	2				
BE		11	0	28	0	60	1	1	39	0				
BG		31	15	16	-6	48	-5	5	47	9				
CZ		12	-2	35	16	52	-12	1	47	14				
DK		5	-9	25	2	67	6	3	30	-7				
DE		14	0	36	-1	46	-2	4	50	-1				
EE		4	-4	20	4	75	1	1	24	0				
IE		15	1	45	14	40	-13	0	60	15				
EL		17	1	33	-4	46	1	4	50	-3				
ES		13	-4	31	6	55	-3	1	44	2				
FR		33	-9	33	5	33	3	1	66	-4				
HR		29	9	33	3	37	-13	1	62	12				
IT		28	6	21	-3	50	-2	1	49	3				
CY		24	9	32	5	42	-16	2	56	14				
LV		15	-2	30	-4	54	6	1	45	-6				
LT		5	-2	18	-2	73	6	4	23	-4				
LU		11	-10	18	-17	69	25	2	29	-27				
HU		21	1	27	0	48	-3	4	48	1				
MT		26	18	14	-19	60	1	0	40	-1				
NL		10	-4	27	-6	63	10	0	37	-10				
AT		17	0	27	-1	56	3	0	44	-1				
PL		26	3	39	10	34	-13	1	65	13				
PT		22	-14	20	-6	51	16	7	42	-20				
RO		17	8	24	-1	54	-5	5	41	7				
SI		16	1	28	-4	54	1	2	44	-3				
SK		26	-2	34	11	38	-6	2	60	9				
FI		12	-2	27	-7	60	9	1	39	-9				
SE		9	3	23	3	66	-7	2	32	6				
UK		7	1	25	2	66	0	2	32	3				
US		9	2	20	0	69	-2	2	29	2				
CH		22	3	34	6	42	-11	2	56	9				

Q5B.5 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Difficulties in maintaining intellectual property rights (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	FL433	Diff. FL433-FL415	FL415
EU28		3	1	11	2	80	-3	6	14	3				
BE		1	-2	4	-1	87	-1	8	5	-3				
BG		7	-4	11	3	68	-2	14	18	-1				
CZ		0	-1	9	4	85	-6	6	9	3				
DK		0	0	6	1	87	4	7	6	1				
DE		4	2	13	5	79	-10	4	17	7				
EE		0	-1	6	2	88	7	6	6	1				
IE		1	0	7	0	86	10	6	8	0				
EL		6	-1	18	13	71	-10	5	24	12				
ES		0	-3	9	2	88	0	3	9	-1				
FR		3	0	19	12	76	-5	2	22	12				
HR		5	2	10	1	80	-4	5	15	3				
IT		6	3	13	3	77	-6	4	19	6				
CY		3	-3	4	-10	93	13	0	7	-13				
LV		1	1	10	-2	86	1	3	11	-1				
LT		5	4	14	1	79	2	2	19	5				
LU		5	4	7	-11	80	-1	8	12	-7				
HU		2	-1	6	-2	88	4	4	8	-3				
MT		8	6	9	9	66	-19	17	17	15				
NL		0	0	5	0	88	-6	7	5	0				
AT		6	4	8	-6	84	0	2	14	-2				
PL		8	8	16	-3	67	0	9	24	5				
PT		8	0	8	-9	76	16	8	16	-9				
RO		2	-1	6	-1	89	1	3	8	-2				
SI		0	-2	12	1	86	2	2	12	-1				
SK		6	2	19	9	72	-7	3	25	11				
FI		1	1	7	-3	84	-2	8	8	-2				
SE		0	0	5	0	89	0	6	5	0				
UK		0	0	7	-1	78	0	15	7	-1				
US		1	1	6	1	86	-5	7	7	2				
CH		4	1	6	-3	87	3	3	10	-2				

Q5B.6 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Administrative or legal issues (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	
EU28		13	1	26	3	60	-4	1	39	4				
BE		8	-4	27	1	65	4	0	35	-3				
BG		26	6	14	-4	59	3	1	40	2				
CZ		10	5	28	3	60	-8	2	38	8				
DK		3	0	23	6	72	-7	2	26	6				
DE		11	4	24	-3	62	-4	3	35	1				
EE		5	3	11	-1	84	1	0	16	2				
IE		2	-1	17	-2	81	3	0	19	-3				
EL		13	-5	21	-8	66	15	0	34	-13				
ES		8	2	34	12	58	-14	0	42	14				
FR		23	1	33	-4	44	3	0	56	-3				
HR		24	5	37	11	38	-17	1	61	16				
IT		25	3	25	5	50	-8	0	50	8				
CY		20	0	25	-7	55	7	0	45	-7				
LV		8	0	29	-3	63	3	0	37	-3				
LT		7	3	18	-8	72	4	3	25	-5				
LU		24	5	21	-12	50	2	5	45	-7				
HU		10	-3	26	8	63	-4	1	36	5				
MT		8	8	9	-10	83	2	0	17	-2				
NL		6	-3	25	8	69	-5	0	31	5				
AT		8	-4	24	-2	68	7	0	32	-6				
PL		15	-3	43	6	41	-2	1	58	3				
PT		11	-6	15	-3	71	8	3	26	-9				
RO		8	6	19	7	72	-14	1	27	13				
SI		4	0	34	10	60	-12	2	38	10				
SK		14	-11	30	10	54	2	2	44	-1				
FI		3	1	17	2	80	-3	0	20	3				
SE		3	-1	19	-2	77	3	1	22	-3				
UK		0	-4	14	3	84	2	2	14	-1				
US		4	1	14	1	81	-1	1	18	2				
CH		9	-2	26	-7	63	7	2	35	-9				

Q5B.7 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Lack of marketing expertise (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	
EU28		6	0	25	5	67	-5	2	31	5				
BE		1	-2	16	-4	78	4	5	17	-6				
BG		12	0	24	3	58	-7	6	36	3				
CZ		4	0	22	10	71	-8	3	26	10				
DK		10	5	24	11	64	-15	2	34	16				
DE		4	3	19	-1	73	-6	4	23	2				
EE		4	-1	19	4	74	-1	3	23	3				
IE		8	-5	36	-4	55	8	1	44	-9				
EL		2	-7	30	0	68	7	0	32	-7				
ES		8	5	24	1	66	-7	2	32	6				
FR		7	-4	31	3	60	-1	2	38	-1				
HR		5	2	30	9	63	-11	2	35	11				
IT		5	-1	27	11	67	-10	1	32	10				
CY		9	2	34	8	57	-10	0	43	10				
LV		4	-3	22	-17	74	20	0	26	-20				
LT		8	4	21	-9	68	12	3	29	-5				
LU		0	-1	17	-12	76	14	7	17	-13				
HU		8	3	17	3	71	-8	4	25	6				
MT		9	7	26	7	48	-29	17	35	14				
NL		3	-3	21	6	75	-4	1	24	3				
AT		1	-2	27	9	71	-8	1	28	7				
PL		12	-2	36	-2	50	5	2	48	-4				
PT		8	-3	11	-3	76	7	5	19	-6				
RO		8	5	24	5	66	-9	2	32	10				
SI		1	-1	30	14	65	-17	4	31	13				
SK		0	-5	36	12	57	-8	7	36	7				
FI		3	0	20	-8	76	7	1	23	-8				
SE		2	-2	12	2	84	0	2	14	0				
UK		5	2	23	8	69	-10	3	28	10				
US		2	-2	17	1	80	3	1	19	-1				
CH		3	2	17	-9	76	3	4	20	-7				

Q5B.8 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Market dominated by established competitors (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	
EU28		24	2	30	-1	44	-2	2	54	1				
BE		12	-3	30	-2	55	5	3	42	-5				
BG		38	14	22	-3	39	-8	1	60	11				
CZ		17	-5	34	-1	49	8	0	51	-6				
DK		13	2	30	5	55	-7	2	43	7				
DE		20	8	24	-5	51	-7	5	44	3				
EE		20	4	30	-6	50	6	0	50	-2				
IE		15	-3	33	-10	52	14	0	48	-13				
EL		25	-7	38	0	37	8	0	63	-7				
ES		23	-3	29	-12	48	15	0	52	-15				
FR		34	4	33	-2	33	-2	0	67	2				
HR		26	-8	33	6	40	2	1	59	-2				
IT		27	-2	33	11	37	-12	3	60	9				
CY		46	3	16	-21	38	18	0	62	-18				
LV		23	-5	33	1	43	3	1	56	-4				
LT		27	12	19	-19	51	8	3	46	-7				
LU		9	-15	39	-1	46	10	6	48	-16				
HU		30	1	29	-2	39	1	2	59	-1				
MT		26	6	34	7	40	-13	0	60	13				
NL		21	10	31	2	47	-13	1	52	12				
AT		17	-2	23	4	59	-3	1	40	2				
PL		32	1	38	-4	29	4	1	70	-3				
PT		25	-13	19	-2	51	12	5	44	-15				
RO		23	-8	28	0	49	10	0	51	-8				
SI		21	11	33	-3	45	-9	1	54	8				
SK		19	-3	35	3	39	-1	7	54	0				
FI		8	-3	25	3	66	0	1	33	0				
SE		14	2	36	12	49	-13	1	50	14				
UK		13	6	28	0	57	-6	2	41	6				
US		6	-1	23	-2	71	5	0	29	-3				
CH		22	2	27	-6	49	2	2	49	-4				

Q5B.9 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Low demand for your goods or services (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem			A minor problem			Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	FL433	Diff. FL433-FL415	FL415
EU28		20	1	26	1	53	-2	1	46	2				
BE		3	-6	22	6	74	0	1	25	0				
BG		37	8	18	2	43	-5	2	55	10				
CZ		6	-9	30	3	64	9	0	36	-6				
DK		12	9	21	-6	62	-8	5	33	3				
DE		10	8	20	-4	69	-5	1	30	4				
EE		9	-6	31	6	60	4	0	40	0				
IE		14	0	25	-6	61	6	0	39	-6				
EL		41	-10	29	0	30	11	0	70	-10				
ES		38	4	25	-3	37	-1	0	63	1				
FR		18	-4	29	7	50	-6	3	47	3				
HR		19	-12	37	7	42	3	2	56	-5				
IT		31	0	25	4	44	-4	0	56	4				
CY		29	-34	31	10	40	24	0	60	-24				
LV		16	0	36	-4	48	5	0	52	-4				
LT		16	6	20	-6	61	2	3	36	0				
LU		17	1	11	-13	70	10	2	28	-12				
HU		9	-12	24	-3	65	17	2	33	-15				
MT		17	3	17	-4	57	-8	9	34	-1				
NL		8	-6	28	12	64	-5	0	36	6				
AT		4	1	27	3	69	-4	0	31	4				
PL		22	1	37	-9	36	5	5	59	-8				
PT		35	-16	23	2	39	13	3	58	-14				
RO		23	-14	25	1	52	14	0	48	-13				
SI		9	-1	31	2	56	-4	4	40	1				
SK		11	-9	38	6	48	4	3	49	-3				
FI		15	2	22	-10	63	8	0	37	-8				
SE		6	-5	14	-6	79	11	1	20	-11				
UK		6	4	23	2	69	-6	2	29	6				
US		4	-2	24	2	72	1	0	28	0				
CH		10	0	29	3	58	-6	3	39	3				

Q5B.10 Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all?

Weak distribution channels (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		A major problem		A minor problem		Not a problem at all			Don't know	Total 'A problem'		
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	FL433	Diff. FL433-FL415	FL415	
EU28		8	2	17	1	70	-4	5	25	3		
BE		5	5	11	1	78	-8	6	16	6		
BG		12	1	14	-1	64	4	10	26	0		
CZ		6	5	15	2	69	-10	10	21	7		
DK		5	1	8	0	85	-1	2	13	1		
DE		15	10	12	-7	68	-8	5	27	3		
EE		8	0	14	-4	75	11	3	22	-4		
IE		1	-3	10	0	86	5	3	11	-3		
EL		8	-5	22	5	62	2	8	30	0		
ES		10	8	13	-1	74	-6	3	23	7		
FR		10	0	26	3	62	-3	2	36	3		
HR		8	5	24	1	65	-6	3	32	6		
IT		11	4	23	9	62	-14	4	34	13		
CY		7	-12	15	-3	75	14	3	22	-15		
LV		8	1	24	-4	63	-1	5	32	-3		
LT		5	3	11	-7	75	9	9	16	-4		
LU		3	-2	5	-17	90	21	2	8	-19		
HU		8	3	19	-2	70	-1	3	27	1		
MT		8	3	9	-13	74	8	9	17	-10		
NL		2	-1	10	-1	85	2	3	12	-2		
AT		6	2	20	9	71	-13	3	26	11		
PL		15	-2	26	-4	50	4	9	41	-6		
PT		5	-13	11	-6	74	17	10	16	-19		
RO		8	-3	16	-6	73	11	3	24	-9		
SI		4	2	17	-2	79	1	0	21	0		
SK		3	-1	22	2	63	-3	12	25	1		
FI		2	1	10	-6	88	6	0	12	-5		
SE		1	-2	4	-7	92	9	3	5	-9		
UK		2	0	7	-1	80	1	11	9	-1		
US		2	1	15	8	78	-6	5	17	9		
CH		8	5	22	6	68	-11	2	30	11		

Q5BT Thinking about the commercialisation of your company's goods or services since January 2013, have any of the following been a major problem, a minor problem or not a problem at all? (%)
(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		At least one major problem		At least one minor problem		Not a problem at all	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415
EU28		56	1	77	4	13	-2
BE		40	-3	73	4	19	-2
BG		74	-3	66	-1	7	-6
CZ		56	6	81	10	12	-6
DK		36	-2	73	6	19	-9
DE		48	8	79	5	15	-4
EE		40	-10	76	1	18	1
IE		45	-3	89	9	10	-1
EL		77	-4	87	0	7	2
ES		56	-6	75	0	15	6
FR		68	-7	87	3	4	-4
HR		70	-4	87	8	5	-1
IT		68	-1	74	12	7	-7
CY		66	-11	78	-6	9	8
LV		55	-14	83	-4	12	5
LT		55	8	71	-7	17	3
LU		47	-4	70	-3	18	-5
HU		65	6	73	-3	14	0
MT		52	3	57	-16	17	-8
NL		37	-2	74	2	19	2
AT		48	2	81	10	13	-9
PL		71	7	88	-3	5	2
PT		72	-12	59	-4	13	8
RO		66	5	72	-3	15	1
SI		42	-1	84	2	11	1
SK		59	-1	83	6	11	-1
FI		32	-9	74	-5	21	7
SE		31	-4	74	5	21	-4
UK		27	3	68	11	30	-7
US		20	-7	57	0	37	-1
CH		48	0	77	7	15	-4

Q6A Thinking about possible public support for commercialisation of your innovative goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		Meeting regulations or standards		Accessing or reinforcing online selling		Participating in conferences, trade fairs, exhibitions	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415
EU28		19	-1	26	3	24	2
BE		22	2	28	10	25	2
BG		9	-4	20	-3	16	0
CZ		15	-1	18	0	33	9
DK		9	-10	21	8	30	16
DE		25	5	23	9	22	-3
EE		7	-2	16	9	24	-8
IE		27	9	20	-16	32	3
EL		12	3	33	4	36	7
ES		19	-2	28	-2	25	8
FR		38	-2	24	9	22	4
HR		27	6	21	2	26	-11
IT		10	-1	34	-4	16	-3
CY		11	-2	23	-5	32	2
LV		17	6	21	6	36	5
LT		6	0	19	5	25	0
LU		22	-1	12	-8	20	7
HU		14	-4	28	11	18	-9
MT		19	1	12	-14	48	12
NL		24	1	27	-5	19	-6
AT		22	1	17	-3	25	-1
PL		14	-1	20	3	31	-1
PT		9	-9	23	-4	24	-3
RO		13	5	20	1	23	5
SI		12	-4	18	1	26	-1
SK		11	-7	17	2	19	-5
FI		11	-1	24	-7	34	-1
SE		14	0	16	1	21	-4
UK		16	-9	32	6	31	4
US		14	1	25	-2	20	0
CH		19	8	20	9	26	6

Q6A Thinking about possible public support for commercialisation of your innovative goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=1 OR Q2.2=1)

		Training staff in how to promote and market innovative goods or services		Applying for, managing or protecting intellectual property rights	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415
EU28		29	-1	5	-1
BE		46	13	6	-1
BG		37	9	3	0
CZ		28	5	10	4
DK		19	-5	5	-1
DE		25	7	11	2
EE		29	-15	3	1
IE		29	-8	7	6
EL		26	5	2	-3
ES		34	-1	3	0
FR		35	-7	6	-3
HR		23	-6	3	1
IT		25	-3	2	-2
CY		22	-1	2	-5
LV		24	-5	3	-5
LT		23	-2	4	3
LU		44	4	7	-1
HU		29	9	6	2
MT		34	-9	5	5
NL		28	-2	8	0
AT		26	-4	11	-1
PL		24	3	8	1
PT		34	-8	2	-1
RO		41	6	7	4
SI		17	-1	0	-5
SK		29	5	10	3
FI		28	-1	3	-3
SE		24	-3	6	0
UK		25	-12	4	0
US		30	-13	4	-11
CH		20	6	9	3

Q6A Thinking about possible public support for commercialisation of your innovative goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=1 OR Q2.2=1)

	Market-testing a product or service before launch		Accessing or reinforcing your presence in export markets		Other (SPONT-ANEOUS)		None (SPONT-ANEOUS)		Don't know
	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	
EU28 	10	1	14	-3	2	-1	15	0	2
BE 	8	-5	15	-6	2	2	7	-9	0
BG 	15	4	20	5	1	-2	16	5	3
CZ 	7	-6	9	-6	4	2	16	-4	4
DK 	10	2	19	1	2	-3	17	1	4
DE 	11	3	6	-11	1	-4	16	-7	3
EE 	11	-1	26	7	6	2	12	-7	3
IE 	3	-4	10	-6	0	0	15	7	1
EL 	12	1	40	-5	0	-1	4	-5	2
ES 	16	7	20	-9	2	0	10	-1	0
FR 	8	2	6	-3	3	1	12	1	1
HR 	16	8	30	9	5	0	8	2	1
IT 	5	-4	15	-1	4	0	20	7	1
CY 	16	7	44	2	0	-2	15	6	0
LV 	8	-1	18	-1	2	-2	12	1	2
LT 	11	-7	28	12	4	2	20	6	4
LU 	20	5	15	4	3	2	11	2	2
HU 	17	2	21	7	2	-7	13	-7	1
MT 	26	14	15	-5	0	-2	10	-6	0
NL 	18	7	13	-1	1	0	15	2	3
AT 	14	4	13	1	2	0	18	2	1
PL 	7	-2	20	3	2	1	11	-7	3
PT 	12	0	16	-5	1	-1	18	6	2
RO 	14	6	13	2	1	1	10	-6	4
SI 	15	4	21	5	6	1	19	-1	0
SK 	7	0	14	0	2	1	15	1	6
FI 	13	6	17	-5	0	0	17	0	1
SE 	20	2	16	0	1	1	15	1	7
UK 	8	0	3	-8	1	0	18	7	3
US 	10	1	15	3	1	-2	17	3	6
CH 	12	6	10	2	4	-3	20	-24	1

Q6B Thinking about possible public support for commercialisation of your goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		Meeting regulations or standards		Accessing or reinforcing online selling		Participating in conferences, trade fairs, exhibitions	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415
EU28		18	-2	18	1	17	1
BE		24	1	16	10	11	-10
BG		11	2	12	0	17	4
CZ		18	3	5	-6	16	0
DK		17	1	10	-4	20	6
DE		23	-1	21	4	14	-3
EE		6	1	6	-9	13	-5
IE		32	7	20	-1	17	-7
EL		12	1	29	6	20	6
ES		19	-7	11	-15	24	2
FR		32	-8	28	10	18	9
HR		17	-1	26	7	24	2
IT		9	-2	16	-1	13	0
CY		12	-2	29	9	24	-1
LV		19	4	12	1	23	8
LT		6	-3	10	3	19	2
LU		13	-13	9	-10	20	7
HU		13	1	21	5	13	-3
MT		22	-9	0	-9	26	7
NL		19	-6	23	-3	19	4
AT		30	13	16	-6	23	12
PL		16	6	20	4	13	-4
PT		7	-6	13	-6	23	10
RO		10	2	14	8	22	10
SI		18	3	20	12	15	-9
SK		15	-1	10	0	11	-4
FI		13	-4	18	-1	17	-4
SE		15	-7	5	-2	26	4
UK		15	0	17	1	13	-2
US		12	-6	11	-8	19	-2
CH		21	7	11	1	18	7

Q6B Thinking about possible public support for commercialisation of your goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		Training staff in how to promote and market innovative goods or services		Applying for, managing or protecting intellectual property rights	
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415
EU28		21	-3	3	-1
BE		32	1	4	-4
BG		19	-3	2	-3
CZ		25	9	5	3
DK		24	1	2	-1
DE		13	-9	4	0
EE		28	5	2	1
IE		25	3	3	0
EL		16	-7	1	-1
ES		31	2	8	-2
FR		28	-8	1	0
HR		22	9	5	1
IT		11	-12	3	1
CY		18	-4	0	-3
LV		26	7	4	2
LT		25	-3	7	6
LU		25	0	8	1
HU		22	5	3	1
MT		34	13	0	0
NL		20	6	3	0
AT		28	14	7	0
PL		18	-2	5	4
PT		25	-5	3	-4
RO		22	7	5	0
SI		18	6	0	-1
SK		20	2	6	2
FI		14	-4	3	-1
SE		18	-6	1	-1
UK		23	1	1	-4
US		24	2	1	-4
CH		17	0	4	2

Q6B Thinking about possible public support for commercialisation of your goods or services, which of the following two types of intervention would have the most positive impact on your company? Support for: (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3)

		Market-testing a product or service before launch			Accessing or reinforcing your presence in export markets			Other (SPONT-ANEOUS)			None (SPONT-ANEOUS)			Don't know
		FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	FL433	Diff. FL433-FL415	FL415	
EU28		6	1	9	-1	3	0	30	1	3				
BE		2	-6	8	-1	1	0	28	2	4				
BG		9	1	5	2	0	-2	34	1	9				
CZ		6	-1	2	-6	3	-2	35	-1	2				
DK		3	-4	11	-6	5	2	26	-7	7				
DE		4	1	6	-1	2	2	35	0	5				
EE		2	-2	14	6	5	-3	38	-1	4				
IE		1	-2	5	-3	0	-2	20	-1	8				
EL		8	1	23	-11	5	2	22	-1	0				
ES		8	-3	15	0	2	-1	20	4	5				
FR		7	3	6	1	1	1	17	-9	0				
HR		12	8	14	-9	5	1	14	-7	3				
IT		6	5	8	-3	10	3	37	11	1				
CY		0	-4	31	-5	0	0	22	6	0				
LV		3	0	16	2	3	-1	19	-9	2				
LT		4	-1	12	3	5	-1	34	-2	5				
LU		10	7	12	1	4	4	27	9	3				
HU		7	3	14	-7	8	3	31	-7	5				
MT		9	5	0	-10	0	-3	26	-11	9				
NL		8	2	7	1	2	1	32	-4	1				
AT		7	-1	8	4	3	-2	18	-21	2				
PL		5	-4	15	1	0	0	29	0	6				
PT		1	-4	12	-2	2	-7	37	8	5				
RO		4	0	12	6	1	-3	31	-7	5				
SI		8	7	11	-1	8	1	22	-11	0				
SK		6	2	7	-4	3	0	32	1	5				
FI		4	-3	5	-6	4	3	41	6	2				
SE		7	-4	9	4	2	2	36	4	4				
UK		6	2	3	-1	0	-1	43	8	3				
US		5	-2	5	0	1	-2	30	-7	11				
CH		6	2	8	1	6	3	31	-19	3				

Q7 Approximately what percentage of your company's turnover in 2015 was invested in innovation activities? (%)

(ASK IF Q2.1=1 OR Q2.2=1 OR Q2.3=1 OR Q2.4=1 OR Q2.5=1)

		0%		Less than 1%		Between 1 and 5%		Between 6 and 10%		11% or more		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		24	2	19	1	36	0	10	0	7	-2	4
BE		17	5	14	-4	44	-4	12	2	10	4	3
BG		26	4	18	2	31	-10	8	-2	13	7	4
CZ		15	1	19	-3	42	5	13	1	10	-1	1
DK		19	5	28	7	31	-3	9	-1	9	-1	4
DE		15	0	24	4	37	-3	10	0	7	-1	7
EE		18	-3	22	-5	37	8	12	4	4	-5	7
IE		27	6	17	-5	34	1	11	2	8	-4	3
EL		27	1	16	1	38	3	9	-2	9	-1	1
ES		26	-3	25	9	33	-7	11	3	2	-2	3
FR		33	0	21	8	31	-6	7	0	6	-2	2
HR		16	-1	33	8	34	-2	9	1	6	-4	2
IT		23	3	12	-6	43	8	10	-4	7	1	5
CY		25	-5	19	7	35	-4	6	1	10	0	5
LV		28	-1	19	0	34	5	8	-1	8	-2	3
LT		22	3	18	-8	32	-3	11	4	11	1	6
LU		18	-2	20	1	34	-4	10	1	11	-1	7
HU		15	-5	21	0	47	8	11	-2	4	0	2
MT		14	-7	9	-7	52	10	9	-6	9	6	7
NL		21	1	17	2	40	5	10	-5	8	-6	4
AT		10	-3	23	4	39	-1	13	3	9	1	6
PL		28	8	17	-2	33	0	15	6	4	-11	3
PT		24	-9	22	10	37	4	7	-4	7	2	3
RO		36	8	22	1	27	-2	7	-2	6	-3	2
SI		27	4	25	3	27	-8	12	1	5	-2	4
SK		17	6	14	0	40	5	13	-1	14	-7	2
FI		15	-1	29	2	39	2	8	3	9	-4	0
SE		27	-1	14	-2	34	5	9	-3	12	-1	4
UK		25	6	23	1	34	1	5	-1	6	-5	7
US		27	-6	14	1	28	-4	13	7	10	-1	8
CH		13	2	19	-8	41	1	15	6	8	-2	4

Q7B Approximately what percentage of your company's turnover in 2015 was invested in innovation activities? (%)

(ASK IF Q2.1=1 OR Q2.2=1 OR Q2.3=1 OR Q2.4=1 OR Q2.5=1)

		No investment		Some investment		Don't know
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433
EU28		24	2	72	-1	4
BE		17	5	80	-2	3
BG		26	4	70	-3	4
CZ		15	1	84	2	1
DK		19	5	77	2	4
DE		15	0	78	0	7
EE		18	-3	75	2	7
IE		27	6	70	-6	3
EL		27	1	72	1	1
ES		26	-3	71	3	3
FR		33	0	65	0	2
HR		16	0	82	2	2
IT		23	3	72	-1	5
CY		25	-6	70	5	5
LV		28	-1	69	2	3
LT		22	3	72	-6	6
LU		18	-2	75	-3	7
HU		15	-5	83	6	2
MT		14	-7	79	3	7
NL		21	1	75	-4	4
AT		10	-3	84	7	6
PL		28	8	69	-7	3
PT		24	-9	73	13	3
RO		36	8	62	-6	2
SI		27	4	69	-6	4
SK		17	6	81	-3	2
FI		15	-1	85	3	0
SE		27	-1	69	-1	4
UK		24	5	69	-3	7
US		27	-6	65	3	8
CH		13	3	82	-5	5

Q8 Do you plan to increase, reduce or keep unchanged the percentage of investment dedicated to innovation in the next 12 months? (%)

(ASK IF Q2.1=1 OR Q2.2=1 OR Q2.3=1 OR Q2.4=1 OR Q2.5=1)

		Increase		Reduce		Keep the percentage unchanged		You do not plan to invest in innovation in the next 12 months		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		28	1	3	-1	47	-1	19	3	3
BE		30	3	4	0	55	-4	10	3	1
BG		39	3	2	-1	34	0	18	-4	7
CZ		32	0	3	0	46	-3	18	3	1
DK		25	-1	5	1	64	1	5	2	1
DE		23	4	1	-4	66	6	7	-4	3
EE		20	-7	2	2	58	13	10	-8	10
IE		43	2	4	2	42	-1	8	-2	3
EL		31	3	3	1	36	-7	27	5	3
ES		27	0	2	1	34	-8	34	6	3
FR		17	-1	4	-4	47	11	31	-6	1
HR		38	0	1	-1	46	-5	11	4	4
IT		30	-2	2	0	44	2	20	6	4
CY		24	-3	2	0	53	8	14	-3	7
LV		32	6	2	-3	40	-4	22	1	4
LT		42	16	2	0	38	-18	10	0	8
LU		20	-7	2	-1	69	17	5	-9	4
HU		35	3	0	0	40	-4	20	3	5
MT		47	0	5	1	41	1	7	-2	0
NL		28	6	3	-3	58	-8	9	7	2
AT		20	-1	2	-1	61	3	14	4	3
PL		39	8	3	-1	39	-4	15	-1	4
PT		37	8	2	-2	44	-3	13	-2	4
RO		51	2	2	0	28	6	15	-5	4
SI		34	14	2	-4	50	-9	7	-1	7
SK		28	3	5	1	52	-5	10	3	5
FI		22	1	4	-4	66	-1	6	4	2
SE		23	-5	6	2	53	2	14	0	4
UK		29	-2	5	2	48	-3	15	7	3
US		28	1	0	-2	51	-2	12	2	9
CH		24	10	4	-1	67	-7	4	0	1

- Q9** What will be the focus of your planned investment in innovation in the next 12 months?
(MULTIPLE ANSWERS POSSIBLE) (%)
(ASK IF 'INVESTS IN INNOVATION;' EXCLUDE IF (Q7=1 AND Q8=2,3) OR IF Q8=4)

		Goods		Services		Processes (e.g. production processes or distribution methods)	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415
EU28		33	-2	44	0	26	0
BE		49	5	43	4	25	-13
BG		26	7	40	11	17	1
CZ		37	9	47	-3	43	4
DK		27	-9	29	-10	23	-3
DE		28	-13	37	-4	32	7
EE		37	16	40	7	32	-2
IE		15	-15	31	-4	21	-1
EL		21	-20	35	6	30	3
ES		20	-10	42	-18	30	-6
FR		43	-2	45	16	26	6
HR		22	-3	42	7	19	-7
IT		35	-1	43	6	18	3
CY		32	-6	30	-22	15	-13
LV		31	3	51	4	42	4
LT		36	12	45	-1	30	-1
LU		40	-1	56	-2	23	-15
HU		42	-1	48	9	15	3
MT		26	-14	38	-14	34	10
NL		41	10	47	4	30	-1
AT		25	6	38	0	32	10
PL		25	-8	53	3	27	1
PT		26	-7	42	0	13	-10
RO		39	15	46	5	20	9
SI		30	-9	30	-6	18	-2
SK		23	-3	60	7	20	-5
FI		57	6	67	17	31	7
SE		32	4	42	-4	14	-9
UK		42	1	54	-3	31	-5
US		50	30	72	40	51	31
CH		20	-11	31	-14	22	-1

- Q9** What will be the focus of your planned investment in innovation in the next 12 months?
(MULTIPLE ANSWERS POSSIBLE) (%)
(ASK IF 'INVESTS IN INNOVATION;' EXCLUDE IF (Q7=1 AND Q8=2,3) OR IF Q8=4)

		Marketing strategies (e.g. packaging, product promotion or placement or pricing strategies)		Organisational methods		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		40	0	23	-5	4
BE		39	1	36	-1	6
BG		36	1	22	-2	3
CZ		47	3	19	-13	3
DK		42	5	13	-3	5
DE		39	4	18	-6	6
EE		33	6	12	-14	4
IE		51	-3	28	7	7
EL		42	8	25	-5	1
ES		41	-11	24	-17	2
FR		37	-2	35	0	2
HR		31	-2	28	4	6
IT		35	2	19	-4	3
CY		42	-5	13	-16	2
LV		38	2	27	-6	2
LT		36	12	27	12	6
LU		36	0	23	-21	3
HU		38	-2	14	-8	6
MT		49	7	12	-14	3
NL		38	-5	22	-8	4
AT		47	9	17	-7	4
PL		36	2	21	1	5
PT		42	5	15	-12	6
RO		42	4	26	8	3
SI		39	6	15	-2	5
SK		30	-2	14	1	3
FI		57	8	24	5	0
SE		36	5	14	3	13
UK		61	0	36	-12	5
US		69	37	51	33	4
CH		34	1	13	0	17

Q10A What are the two main reasons why your company decided to invest in innovation in the next 12 months? (MAX. 2 ANSWERS) (%)
(ASK IF 'INVESTS IN INNOVATION;' EXCLUDE IF (Q7=1 AND Q8=2,3) OR IF Q8=4)

		Market potential		Customer request		Increased competition	
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415
EU28		40	-3	39	6	36	-3
BE		47	7	38	-3	29	-5
BG		42	4	15	-1	41	1
CZ		41	0	51	17	33	-17
DK		52	4	31	-4	34	9
DE		42	-6	43	7	34	1
EE		39	8	25	-1	40	-3
IE		48	-7	27	3	36	5
EL		57	0	12	-13	44	-2
ES		52	-2	30	18	41	-6
FR		36	2	60	4	35	-8
HR		38	-6	36	-5	40	1
IT		26	-4	37	0	27	-7
CY		51	7	16	-12	44	-4
LV		41	4	40	1	33	-5
LT		45	16	41	8	37	-10
LU		26	-7	42	-7	31	-11
HU		48	6	24	12	55	6
MT		56	7	26	6	35	-14
NL		58	-8	43	10	23	-1
AT		53	11	34	5	34	1
PL		26	-1	23	-3	61	0
PT		33	-6	32	7	40	-11
RO		33	-8	49	5	39	5
SI		37	9	32	-5	38	-3
SK		32	1	48	9	37	-5
FI		49	2	30	-9	40	1
SE		38	-11	38	10	25	-1
UK		46	-17	43	11	40	-3
US		58	30	33	9	30	13
CH		42	-3	36	-6	31	-6

Q10A What are the two main reasons why your company decided to invest in innovation in the next 12 months? (MAX. 2 ANSWERS) (%)
(ASK IF 'INVESTS IN INNOVATION;' EXCLUDE IF (Q7=1 AND Q8=2,3) OR IF Q8=4)

		Supplier offering a new feature or business solution		New legal or administrative requirements coming into force in the coming years		Other (SPONT-ANEOUS)		Don't know
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433
EU28		12	1	12	0	5	1	3
BE		16	8	23	-1	7	1	2
BG		11	0	15	3	1	-1	7
CZ		12	0	12	-1	4	-2	1
DK		11	1	3	-3	4	-4	2
DE		4	-4	16	-1	5	2	4
EE		5	0	7	-1	10	0	2
IE		15	2	11	-2	4	2	3
EL		9	4	7	2	5	-3	3
ES		8	-13	11	-2	2	-3	3
FR		12	-1	17	-6	7	5	0
HR		11	5	15	2	6	1	1
IT		15	8	6	1	7	5	4
CY		3	-13	9	-1	6	6	2
LV		14	3	17	12	2	-3	3
LT		9	6	9	-1	3	-5	3
LU		20	7	15	-2	0	0	8
HU		17	1	8	-14	3	-4	0
MT		9	-7	15	6	0	-7	8
NL		11	5	19	-2	4	2	3
AT		9	3	12	1	6	-5	3
PL		13	0	20	8	4	1	1
PT		16	0	11	-1	8	4	5
RO		12	4	10	2	4	-2	3
SI		9	-1	3	-5	5	-2	4
SK		6	-2	13	3	4	1	1
FI		11	-9	14	1	2	2	4
SE		16	5	9	5	3	-1	8
UK		23	12	8	-6	3	-2	2
US		19	4	7	-1	4	-2	4
CH		6	2	7	-3	5	-2	14

Q10B What are the two main reasons why your company decided NOT to invest in innovation in the next 12 months? (MAX. 2 ANSWERS) (%)

(ASK IF [Q2.1=2,3 AND Q2.2=2,3 AND Q2.3=2,3 AND Q2.4=2,3 AND Q2.5=2,3])

OR [Q7=1 AND Q8=3] OR Q8=4)

		Lack of human resources	Lack of financial resources	Lack of skills	Lack of demand	The investment would not be profitable	The legal or administrative requirements are too complicated	Other (SPONTANEOUS)	Don't know
EU28		8	28	3	23	30	9	15	10
BE		16	19	4	19	25	12	24	11
BG		7	42	2	23	18	11	13	7
CZ		12	29	5	14	30	16	15	9
DK		7	7	6	9	47	5	14	13
DE		11	10	3	12	30	10	22	21
EE		5	16	3	24	22	1	32	9
IE		7	29	6	21	35	8	12	6
EL		4	43	2	29	22	15	18	4
ES		6	31	4	28	36	7	9	8
FR		13	32	6	36	31	13	15	2
HR		6	41	0	15	33	18	17	1
IT		1	36	1	14	24	7	17	11
CY		0	50	2	17	8	3	15	20
LV		8	35	3	20	30	8	15	8
LT		10	32	6	15	32	4	15	8
LU		17	18	4	21	21	6	29	9
HU		13	35	3	14	24	7	22	8
MT		0	7	0	14	14	0	43	21
NL		6	26	4	38	34	9	11	12
AT		14	23	0	17	29	13	23	7
PL		13	33	5	19	32	17	9	8
PT		7	38	1	20	33	7	15	9
RO		12	35	3	27	23	4	19	6
SI		6	24	2	5	36	4	26	8
SK		10	37	2	12	27	17	9	8
FI		10	20	7	22	39	9	12	14
SE		7	8	3	14	36	2	22	17
UK		7	17	2	28	32	5	13	17
US		7	14	1	25	38	5	7	22
CH		6	21	0	21	25	12	31	4

Q11A Have you used any of the following technologies? (MULTIPLE ANSWERS POSSIBLE) (%)
(ASK ONLY TO MANUFACTURING COMPANIES)

		Sustainable manufacturing technologies (i.e. technologies which use energy and materials more efficiently and drastically reduce emissions)		IT-enabled intelligent manufacturing (i.e. technologies which digitalise the production processes)	
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415
EU28		16	-9	11	-2
BE		28	1	12	-8
BG		9	-12	2	-11
CZ		13	-12	17	5
DK		24	-7	18	16
DE		33	4	17	9
EE		20	-10	13	0
IE		27	13	22	3
EL		20	4	5	-17
ES		8	-25	2	-7
FR		15	1	16	0
HR		29	2	30	6
IT		2	-20	5	-3
CY		0	-11	7	0
LV		13	-13	8	-12
LT		27	11	21	1
LU		18	18	7	7
HU		19	-13	16	-7
MT		1	-14	20	6
NL		14	-15	14	-10
AT		24	0	18	11
PL		27	-6	5	-19
PT		11	3	1	-9
RO		40	8	16	1
SI		24	14	17	6
SK		24	4	13	-2
FI		43	13	32	6
SE		20	-12	3	-23
UK		7	-14	16	-1
US		17	1	9	-5
CH		38	20	18	13

Q11A Have you used any of the following technologies? (MULTIPLE ANSWERS POSSIBLE) (%)
(ASK ONLY TO MANUFACTURING COMPANIES)

High performance manufacturing which combines flexibility, precision and zero-defects (e.g. high precision machine tools, advanced sensors or 3D printers)

		FL433	Diff. FL433- FL415
EU28		17	-5
BE		28	7
BG		17	-5
CZ		13	-18
DK		8	-13
DE		17	0
EE		12	3
IE		21	11
EL		30	13
ES		22	3
FR		9	-7
HR		30	2
IT		14	-11
CY		6	-7
LV		4	-12
LT		23	3
LU		6	-2
HU		12	-15
MT		59	44
NL		23	2
AT		20	7
PL		19	-10
PT		9	-8
RO		20	-11
SI		33	14
SK		18	-9
FI		24	9
SE		36	-2
UK		10	-5
US		14	2
CH		19	-10

Q11A Have you used any of the following technologies? (MULTIPLE ANSWERS POSSIBLE) (%)
(ASK ONLY TO MANUFACTURING COMPANIES)

		None (SPONTANEOUS)		Don't know	At least one technology	
		FL433	Diff. FL433- FL415	FL433	FL433	Diff. FL433- FL415
EU28		66	14	2	33	-11
BE		43	-11	0	57	12
BG		73	12	0	26	-9
CZ		66	22	0	33	-22
DK		60	22	4	36	-15
DE		50	-12	1	49	15
EE		52	0	7	41	-6
IE		52	-14	0	48	15
EL		61	2	0	39	4
ES		77	30	0	23	-26
FR		76	14	0	24	-12
HR		51	4	0	49	0
IT		79	30	0	21	-23
CY		87	12	0	13	-12
LV		78	27	5	17	-30
LT		41	-20	7	52	13
LU		76	-16	4	20	12
HU		66	13	0	34	-13
MT		21	-36	0	79	49
NL		52	3	10	38	-13
AT		58	0	6	37	4
PL		50	7	4	46	-10
PT		82	14	0	18	-13
RO		47	13	0	53	-8
SI		36	-28	3	60	25
SK		36	-12	11	53	1
FI		42	-7	0	58	8
SE		51	8	8	40	-14
UK		77	12	2	21	-10
US		77	7	0	22	-8
CH		40	-17	2	58	16

Q11B Do you plan to use any of the following technologies in the next 12 months?

(MULTIPLE ANSWERS POSSIBLE) (%)

(ASK ONLY TO MANUFACTURING FIRMS)

		Sustainable manufacturing technologies (i.e. technologies which use energy and materials more efficiently and drastically reduce emissions)		IT-enabled intelligent manufacturing (i.e. technologies which digitalise the production processes)	
		FL433	Diff. FL433- FL415	FL433	Diff. FL433- FL415
EU28		15	-9	10	-4
BE		27	-2	19	2
BG		2	-15	15	7
CZ		21	-14	17	5
DK		19	-2	21	19
DE		25	3	11	-8
EE		14	-14	17	0
IE		36	16	30	11
EL		9	-10	3	-17
ES		8	-7	2	-12
FR		15	-9	8	-5
HR		30	-4	30	1
IT		6	-15	5	-8
CY		0	-17	19	3
LV		25	0	6	-15
LT		26	9	27	2
LU		16	3	4	-4
HU		32	0	19	-1
MT		1	-28	20	5
NL		24	-1	13	-11
AT		42	15	19	14
PL		14	-22	5	-12
PT		16	-4	23	18
RO		29	-7	20	4
SI		23	10	10	0
SK		23	1	20	5
FI		40	12	26	-3
SE		13	-17	2	-24
UK		8	-13	16	3
US		20	2	9	-4
CH		31	13	20	12

Q11B Do you plan to use any of the following technologies in the next 12 months?

(MULTIPLE ANSWERS POSSIBLE) (%)

(ASK ONLY TO MANUFACTURING FIRMS)

High performance manufacturing which combines flexibility, precision and zero-defects (e.g. high precision machine tools, advanced sensors or 3D printers)

		FL433	Diff. FL433- FL415
EU28		19	-5
BE		20	3
BG		25	2
CZ		17	-25
DK		24	-2
DE		22	9
EE		17	-1
IE		29	9
EL		21	-2
ES		16	-6
FR		8	-21
HR		23	-13
IT		19	0
CY		0	-13
LV		15	-17
LT		27	4
LU		4	-13
HU		12	-19
MT		20	5
NL		13	-14
AT		19	3
PL		36	1
PT		17	3
RO		32	13
SI		29	17
SK		16	-1
FI		27	-1
SE		29	-5
UK		11	-8
US		14	-4
CH		23	-2

Q11B Do you plan to use any of the following technologies in the next 12 months?

(MULTIPLE ANSWERS POSSIBLE) (%)

(ASK ONLY TO MANUFACTURING FIRMS)

		None (SPONT- ANEOUS)		Don't know	At least one technology	
		FL433	Diff. FL433- FL415	FL433	FL433	Diff. FL433- FL415
EU28		64	12	4	32	-9
BE		62	-5	0	38	6
BG		59	-7	0	41	10
CZ		62	30	4	34	-32
DK		55	12	3	42	-4
DE		51	-10	2	47	13
EE		47	3	12	41	-9
IE		42	-20	1	57	22
EL		77	22	0	23	-13
ES		70	7	7	23	-5
FR		84	32	0	16	-31
HR		47	7	1	52	-8
IT		79	21	1	20	-11
CY		75	12	6	19	-15
LV		52	13	15	33	-25
LT		31	-19	9	60	16
LU		59	-19	24	16	-6
HU		56	6	7	37	-10
MT		40	-16	20	40	10
NL		43	-5	10	47	-2
AT		49	-1	6	45	10
PL		46	7	9	45	-12
PT		67	10	1	32	1
RO		39	8	12	49	-4
SI		43	-17	4	53	21
SK		32	-14	12	56	12
FI		47	12	1	53	-3
SE		60	16	8	32	-18
UK		72	7	2	26	-3
US		72	1	0	27	-2
CH		45	-12	2	54	12

Q11T Have you used any of the following technologies or do you plan to use any of the following technologies in the next 12 months? (MULTIPLE ANSWERS POSSIBLE) (%)

(ASK ONLY TO MANUFACTURING COMPANIES)

		Has used and plans to use advanced technologies		Has used but does not plan to use advanced technologies		Has not used but plans to use advanced technologies		Has not used and does not plan to use advanced technologies	
		FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415	FL433	Diff. FL433-FL415
EU28		26	-9	7	-3	6	0	61	12
BE		38	12	19	0	0	-6	43	-6
BG		26	0	0	-9	15	10	59	-1
CZ		29	-23	4	1	5	-9	62	31
DK		31	-8	5	-7	11	4	53	11
DE		41	12	8	3	7	3	44	-18
EE		35	-8	6	2	6	-1	53	7
IE		39	13	9	2	18	8	34	-23
EL		21	-5	18	9	2	-7	59	3
ES		23	-4	0	-22	0	-1	77	27
FR		9	-20	15	9	8	-10	68	21
HR		48	0	1	1	3	-9	48	8
IT		15	-15	5	-8	5	4	75	19
CY		13	-9	0	-3	6	-6	81	18
LV		16	-30	1	-1	17	5	66	26
LT		52	15	0	-2	8	1	40	-14
LU		16	7	4	4	0	-13	80	2
HU		26	-15	7	2	11	5	56	8
MT		40	10	39	39	0	0	21	-49
NL		37	-7	1	-6	10	5	52	8
AT		35	4	2	0	10	6	53	-10
PL		37	-12	9	2	8	0	46	10
PT		17	1	1	-14	15	0	67	13
RO		41	-10	12	2	8	5	39	3
SI		46	18	14	7	6	1	34	-26
SK		51	11	2	-10	5	1	42	-2
FI		51	6	7	2	2	-9	40	1
SE		32	-15	8	1	0	-3	60	17
UK		20	-7	1	-3	7	5	72	5
US		22	1	1	-8	5	-3	72	10
CH		49	11	10	6	5	1	36	-18

Q12A Which two of the following skills could help improve and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=1 OR Q2.2=1 OR Q2.3=1 OR Q2.4=1 OR Q2.5=1)

		Technical skills needed in your sector	Engineering skills	Organisational and leadership skills	Skills linked to IT and the digital economy	Creativity, inventiveness, experimentation	Soft skills like flexibility, relationship building, resilience, etc.
EU28		24	7	14	17	19	15
BE		29	2	13	27	22	26
BG		20	7	19	10	24	17
CZ		27	8	22	17	22	20
DK		21	6	18	25	21	13
DE		25	9	17	17	25	21
EE		20	16	11	20	20	13
IE		18	8	18	24	20	7
EL		22	10	22	17	14	15
ES		23	5	18	15	13	13
FR		28	6	10	15	20	11
HR		19	12	20	14	12	11
IT		25	6	10	15	14	10
CY		18	4	24	10	19	29
LV		25	16	19	15	18	19
LT		20	16	27	10	28	16
LU		19	9	17	18	14	10
HU		25	10	13	16	10	23
MT		29	10	19	23	20	10
NL		22	4	12	26	30	29
AT		23	6	13	18	26	19
PL		26	13	17	12	19	14
PT		21	4	9	17	15	7
RO		19	8	14	19	14	10
SI		12	9	13	11	20	6
SK		26	6	11	12	20	14
FI		16	3	11	22	31	32
SE		23	3	11	19	21	15
UK		20	8	10	24	19	13
US		17	8	23	16	16	21
CH		16	11	17	17	28	26

Q12A Which two of the following skills could help improve and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=1 OR Q2.2=1 OR Q2.3=1 OR Q2.4=1 OR Q2.5=1)

		Marketing skills	Financial skills relating to investment and access to finance	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28		28	22	2	7	2
BE		21	19	1	4	1
BG		24	21	1	3	3
CZ		31	14	1	4	0
DK		22	11	2	6	6
DE		24	16	1	8	1
EE		26	11	2	2	6
IE		36	20	1	3	3
EL		26	36	1	5	0
ES		39	23	2	8	2
FR		27	32	2	7	1
HR		35	34	1	3	2
IT		24	18	5	9	2
CY		31	26	0	5	2
LV		18	25	1	6	2
LT		23	17	2	2	0
LU		30	23	2	13	2
HU		30	28	2	7	1
MT		34	16	0	7	0
NL		28	16	1	4	3
AT		27	21	1	7	1
PL		22	23	0	5	2
PT		27	37	1	9	3
RO		30	34	1	3	4
SI		35	25	2	8	2
SK		24	24	1	2	3
FI		29	23	0	2	1
SE		31	17	1	8	5
UK		39	15	0	9	1
US		29	12	1	5	4
CH		25	13	1	4	3

Q12B Which two of the following skills could help kick start and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3 AND Q2.3=2,3 AND Q2.4=2,3 AND Q2.5=2,3)

		Technical skills needed in your sector	Engineering skills	Organisational and leadership skills	Skills linked to IT and the digital economy	Creativity, inventiveness, experimentation	Soft skills like flexibility, relationship building, resilience, etc.
EU28		17	5	8	11	11	10
BE		18	5	13	12	19	21
BG		14	5	6	8	8	12
CZ		11	4	16	17	13	14
DK		9	11	1	13	9	3
DE		11	3	11	11	13	11
EE		10	10	9	12	6	8
IE		11	6	15	22	10	8
EL		11	8	14	5	5	17
ES		28	8	9	9	11	12
FR		21	8	8	20	8	10
HR		25	13	9	11	9	4
IT		20	3	3	4	7	7
CY		5	18	21	9	1	9
LV		12	11	12	14	13	10
LT		15	11	16	11	22	12
LU		19	0	4	10	14	5
HU		12	4	10	4	3	16
MT		11	0	11	22	0	22
NL		21	6	8	11	23	18
AT		18	17	8	11	21	8
PL		14	3	13	11	14	14
PT		6	6	4	14	3	2
RO		14	6	6	18	12	11
SI		12	6	15	4	7	2
SK		13	11	8	7	17	10
FI		10	5	3	12	22	17
SE		17	6	7	15	11	7
UK		13	3	6	14	7	2
US		11	4	15	9	10	9
CH		23	11	8	8	21	11

Q12B Which two of the following skills could help kick start and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS) (%)

(ASK IF Q2.1=2,3 AND Q2.2=2,3 AND Q2.3=2,3 AND Q2.4=2,3 AND Q2.5=2,3)

		Marketing skills	Financial skills relating to investment and access to finance	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28		16	22	3	25	3
BE		10	16	2	25	3
BG		14	28	4	18	10
CZ		16	20	2	26	4
DK		20	14	3	27	17
DE		14	12	4	35	4
EE		16	14	11	22	5
IE		20	17	0	19	5
EL		21	50	3	16	0
ES		24	19	3	15	4
FR		22	21	5	21	0
HR		21	31	3	14	0
IT		9	28	4	25	3
CY		16	32	0	19	0
LV		10	29	1	22	3
LT		17	18	4	16	2
LU		30	14	15	11	5
HU		17	38	8	23	6
MT		11	11	11	11	22
NL		22	22	1	22	0
AT		17	28	4	16	0
PL		13	29	2	20	2
PT		9	26	0	37	5
RO		11	31	6	14	4
SI		18	13	7	30	3
SK		15	18	4	14	8
FI		16	14	2	26	3
SE		13	12	2	30	9
UK		21	16	2	38	5
US		25	6	1	22	12
CH		11	15	3	19	4

Q12T Which two of the following skills could help improve/kick start and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS) (%)

		Technical skills needed in your sector	Engineering skills	Organisational and leadership skills	Skills linked to IT and the digital economy	Creativity, inventiveness, experimentation	Soft skills like flexibility, relationship building, resilience, etc.
EU28		22	7	12	15	16	13
BE		25	3	13	22	21	25
BG		18	7	14	9	18	15
CZ		23	7	21	17	20	19
DK		19	7	15	22	18	11
DE		20	7	15	15	21	18
EE		15	13	10	16	13	11
IE		16	7	17	23	16	7
EL		19	10	20	13	11	15
ES		24	6	15	13	13	12
FR		26	7	10	16	16	11
HR		21	13	16	13	11	8
IT		23	5	8	11	12	9
CY		15	8	23	10	15	24
LV		20	14	17	14	16	15
LT		18	14	22	10	25	14
LU		19	6	13	15	14	8
HU		19	7	11	11	7	20
MT		26	8	17	23	16	12
NL		22	5	10	20	28	25
AT		22	9	11	16	25	16
PL		23	10	16	12	18	14
PT		17	4	7	16	12	5
RO		18	8	12	18	14	10
SI		12	8	14	9	17	5
SK		22	8	10	10	19	13
FI		14	4	8	17	27	25
SE		20	5	9	17	16	11
UK		17	6	9	20	14	8
US		15	6	19	13	13	16
CH		18	11	15	15	26	22

Q12T Which two of the following skills could help improve/kick start and support your company's innovation activities over the next two years? (MAX. 2 ANSWERS) (%)

		Marketing skills	Financial skills relating to investment and access to finance	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28		24	22	2	13	2
BE		17	18	1	11	2
BG		20	23	2	9	6
CZ		27	16	1	10	1
DK		22	12	2	10	8
DE		20	15	2	17	2
EE		21	12	6	13	5
IE		31	19	0	9	4
EL		25	40	1	9	0
ES		34	22	3	10	3
FR		26	29	3	11	1
HR		30	33	2	7	1
IT		19	22	5	15	2
CY		27	27	0	8	1
LV		15	27	1	12	2
LT		21	18	3	8	1
LU		30	20	6	12	3
HU		25	32	4	14	3
MT		30	15	2	8	4
NL		26	18	1	11	2
AT		25	22	2	9	1
PL		19	25	0	10	2
PT		22	34	1	16	4
RO		25	33	3	6	4
SI		31	22	4	13	2
SK		21	22	2	6	5
FI		23	19	1	13	2
SE		22	15	2	19	7
UK		31	15	1	21	3
US		27	9	1	13	7
CH		21	14	2	8	3

Q13 Thinking about your company's innovation activities 5 years from now, in which of the following areas do you think your innovations could make a positive impact?
(MAX. 2 ANSWERS) (%)

		Job creation	IT and the digital economy	Resource efficiency (e.g. more efficient use of raw materials)	Lifelong learning and skills improvement	Environmental protection	Construction solutions for future smart cities	Space applications	Health and medical care
EU28		19	14	10	15	11	8	1	5
BE		19	20	10	20	19	6	1	9
BG		20	7	8	18	11	5	0	8
CZ		16	16	10	17	10	7	2	13
DK		12	17	11	7	7	13	1	5
DE		22	15	11	14	13	10	0	8
EE		15	13	8	17	7	10	1	4
IE		26	16	7	12	9	13	0	4
EL		21	15	13	9	19	17	1	4
ES		25	11	11	21	8	6	1	4
FR		18	13	7	21	19	8	1	3
HR		24	17	7	20	16	19	1	3
IT		16	11	8	9	9	8	1	3
CY		18	19	10	13	15	12	0	3
LV		18	15	10	14	10	11	0	7
LT		21	17	12	22	7	16	1	4
LU		15	13	14	11	17	9	0	1
HU		31	13	16	11	15	10	0	4
MT		39	26	24	5	7	14	2	6
NL		9	21	12	16	10	7	3	8
AT		19	17	16	14	16	10	1	9
PL		16	17	10	18	8	6	2	5
PT		26	14	10	13	10	6	0	9
RO		30	10	9	17	10	9	4	6
SI		25	8	8	8	17	9	1	3
SK		18	14	10	21	13	4	1	7
FI		22	15	14	22	10	10	0	7
SE		6	11	12	11	8	5	1	3
UK		13	18	6	11	5	3	0	2
US		12	4	7	7	7	5	2	5
CH		15	15	13	24	15	9	1	11

Q13 Thinking about your company's innovation activities 5 years from now, in which of the following areas do you think your innovations could make a positive impact? (MAX. 2 ANSWERS) (%)

		Transport and transport infrastructures	Availability and quality of food	You do not plan to introduce any innovations in the next 5 years	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU28		9	6	25	2	6	3
BE		11	9	19	1	1	1
BG		5	10	25	2	5	4
CZ		11	6	18	2	4	3
DK		9	8	16	7	5	3
DE		7	4	15	4	10	5
EE		9	5	11	7	12	7
IE		6	3	23	1	5	4
EL		8	8	18	2	4	1
ES		9	3	27	2	3	3
FR		6	9	30	0	4	1
HR		9	5	12	3	5	1
IT		11	5	22	4	10	3
CY		3	2	18	0	14	0
LV		13	6	25	0	2	2
LT		11	6	18	2	2	2
LU		10	6	25	6	5	2
HU		14	2	17	3	9	3
MT		12	6	4	0	8	4
NL		8	4	32	3	3	1
AT		5	7	14	4	7	1
PL		9	3	31	1	2	4
PT		4	10	19	2	5	4
RO		16	7	11	1	4	4
SI		9	3	14	4	13	3
SK		10	8	16	1	6	4
FI		16	6	13	1	7	3
SE		9	6	35	2	9	4
UK		6	10	41	2	5	3
US		2	7	47	2	4	4
CH		9	8	15	3	5	3