



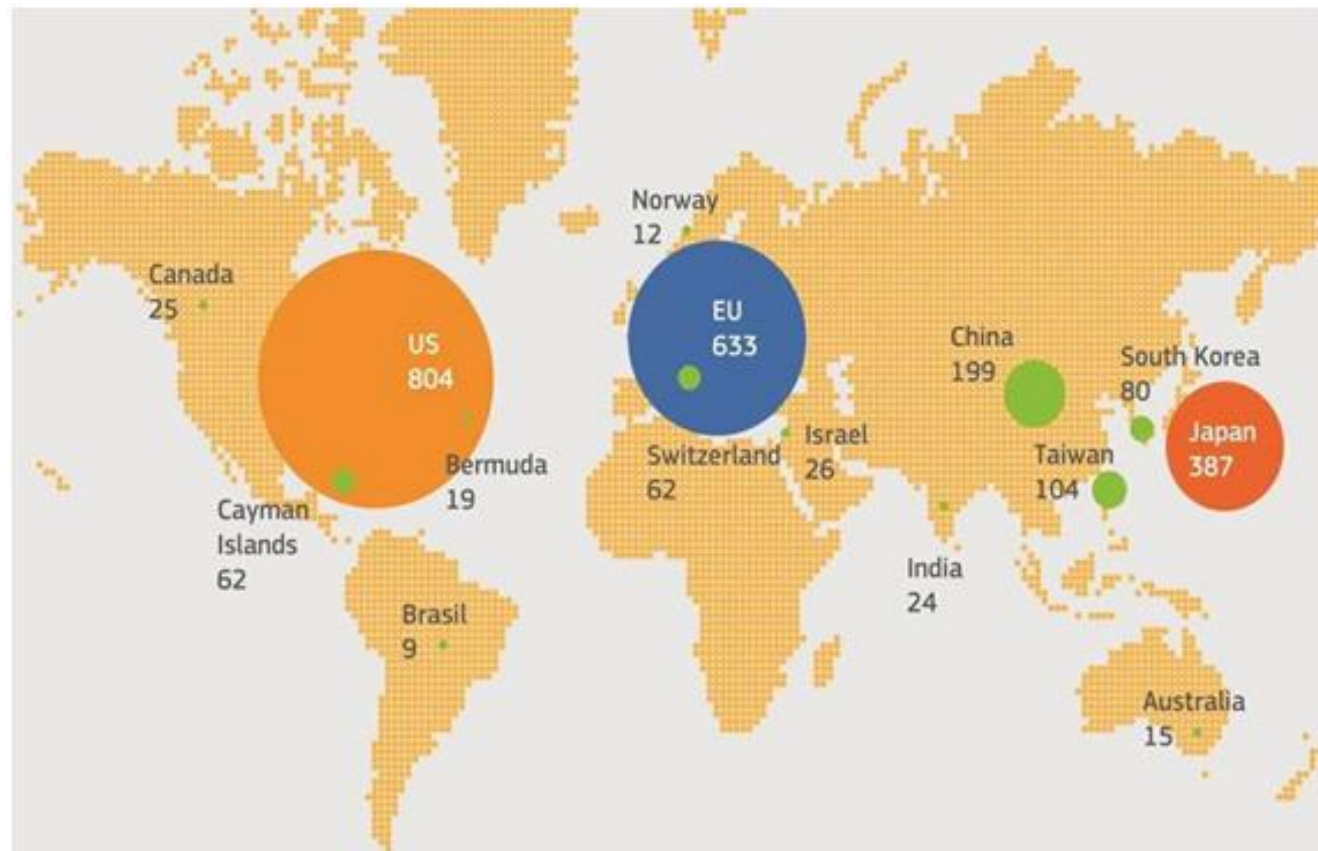
4th IRIMA Workshop on Leading R&D investors and the European manufacturing industry

**Evidence from *The 2014 EU Industrial R&D
Investment Scoreboard***

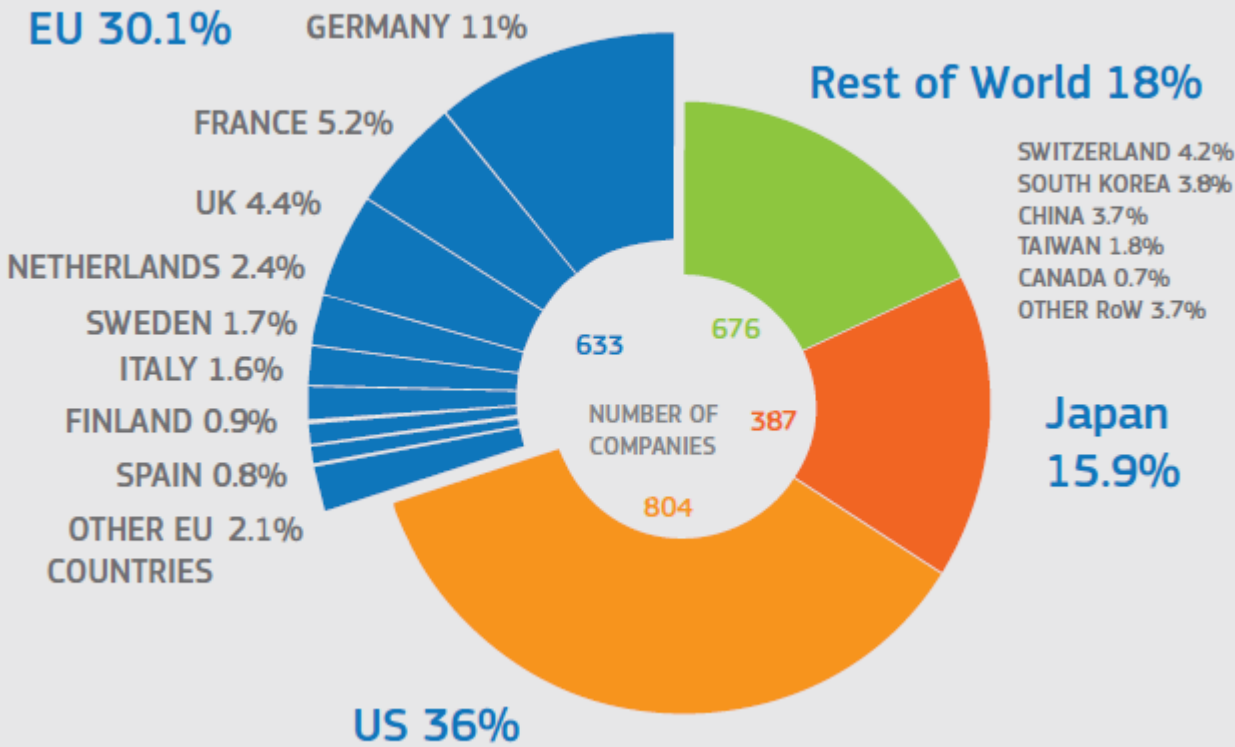
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January 29th, 2015

Geographical distribution of the Top 2500 R&D investors



Regional distribution of R&D investments from world top R&D investors



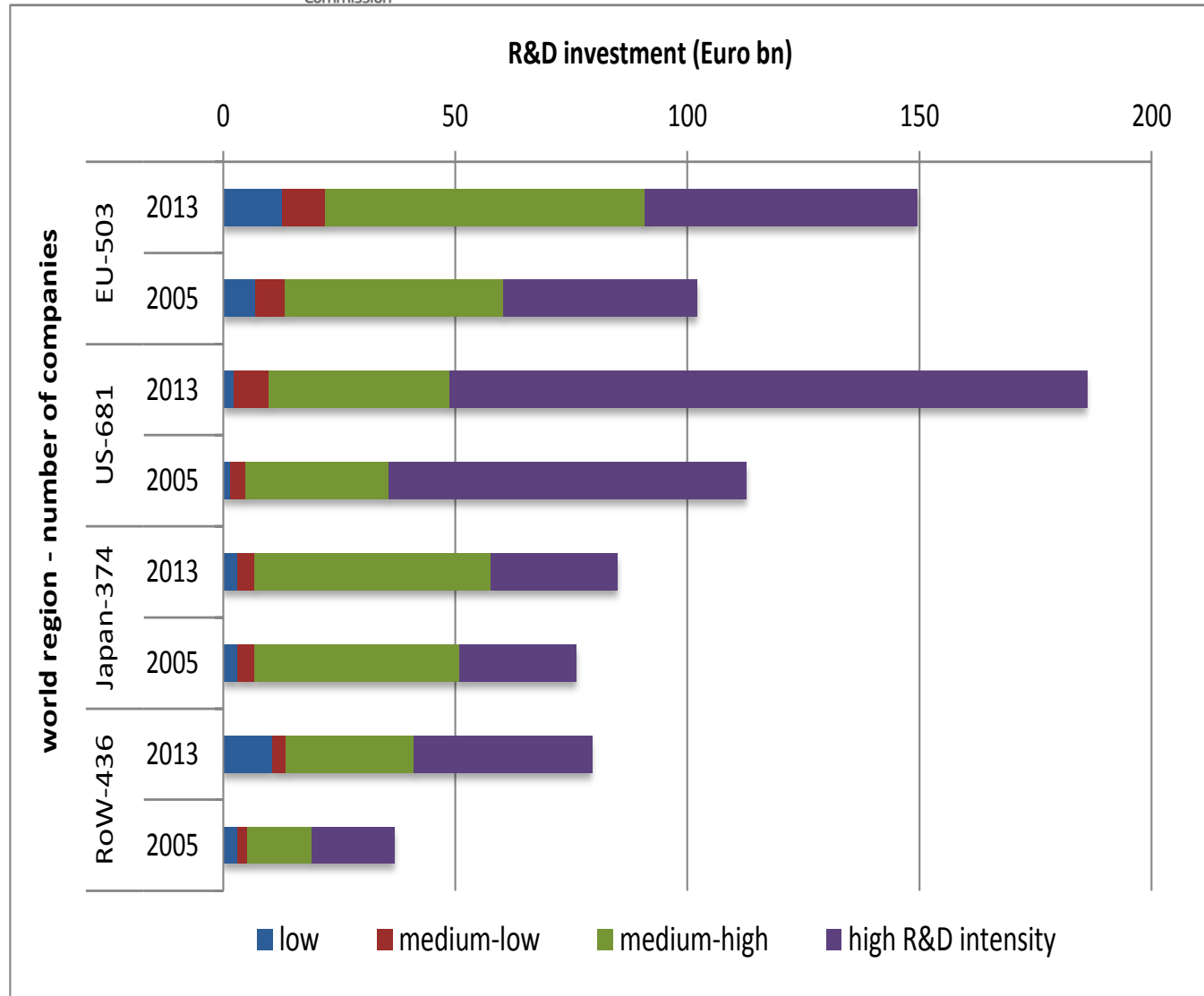
Top 2500 companies
invested €538.5bn = 90% total world business R&D investment

Global change 2012-13:
R&D investment +4.9%
Sales +2.7%

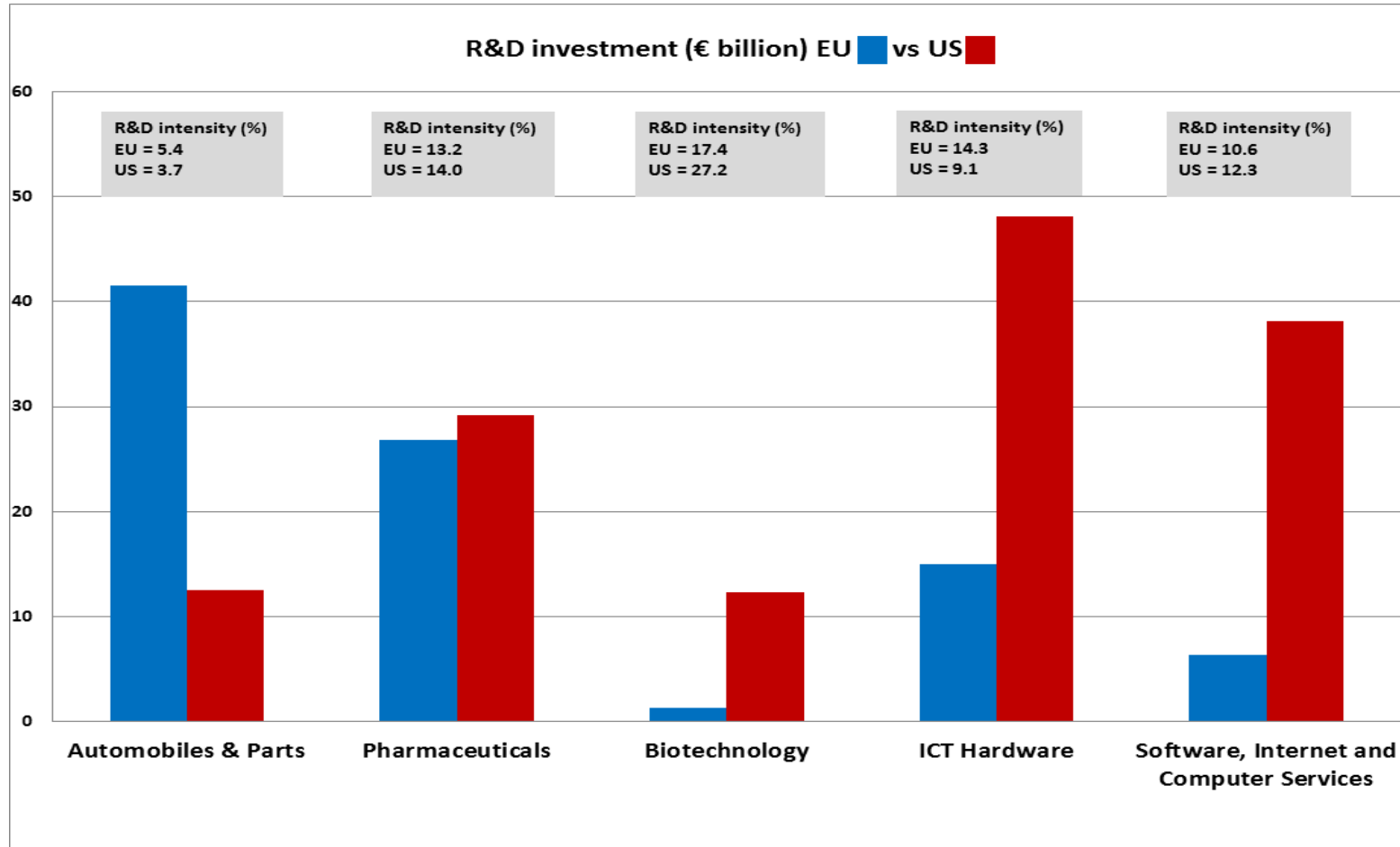
	R&D investment	Sales
EU	+2.6%	-1.9%
US	+5%	+2%
Japan	+5.5%	+11.2%

Data 2013

R&D investments by world regions and R&D-intensity categories



Company R&D investment by sector (EU vs US)



Understanding R&D investment decisions in strategic industrial sectors

R&D Investments

- What drives the allocation of R&D investment?
- What are the main funding channels for R&D investment?

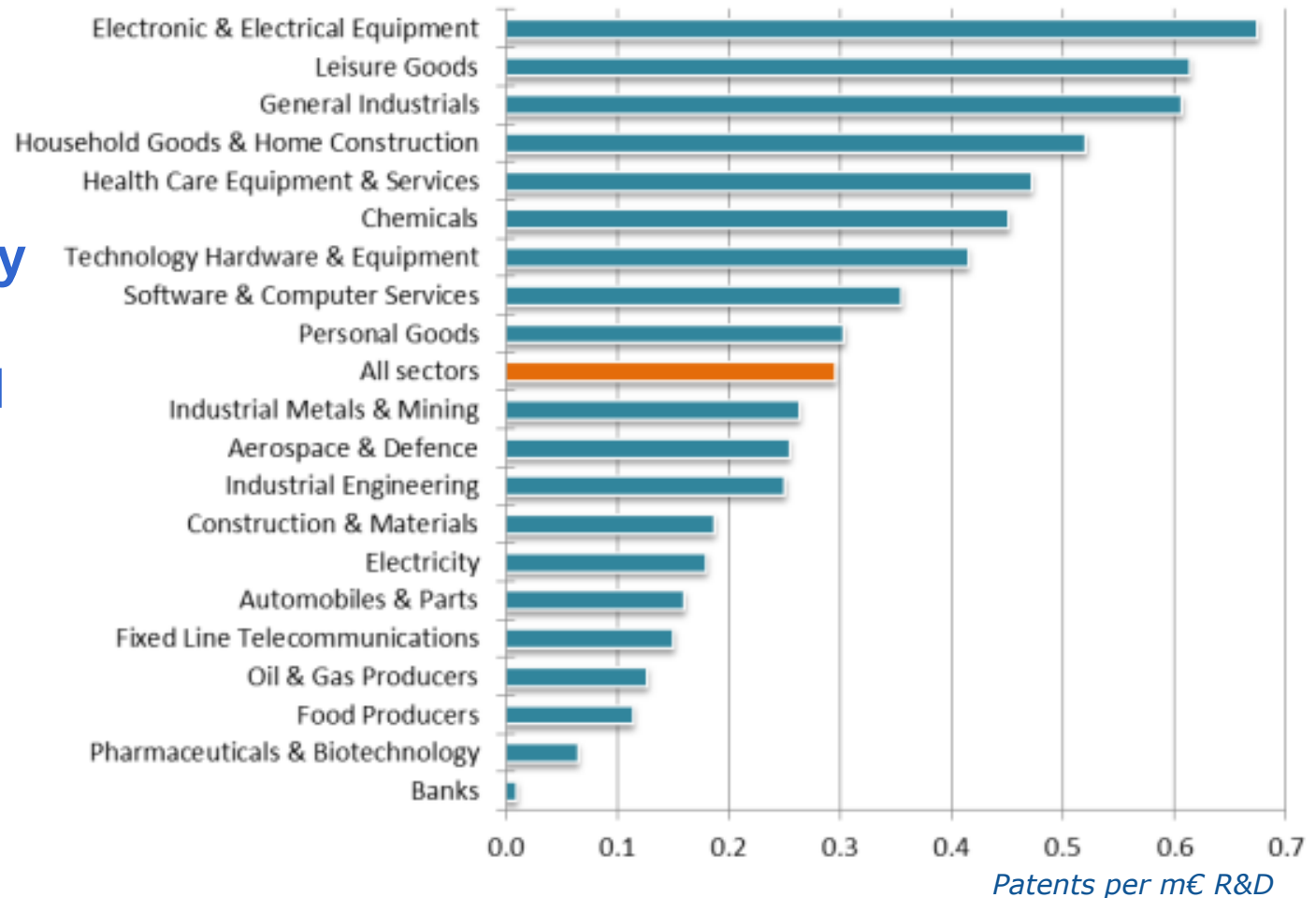
R&D location

- What drives R&D location decisions?
- How R&D and manufacturing location factors relate?
- How to enhance the attractiveness of Europe for R&D projects?

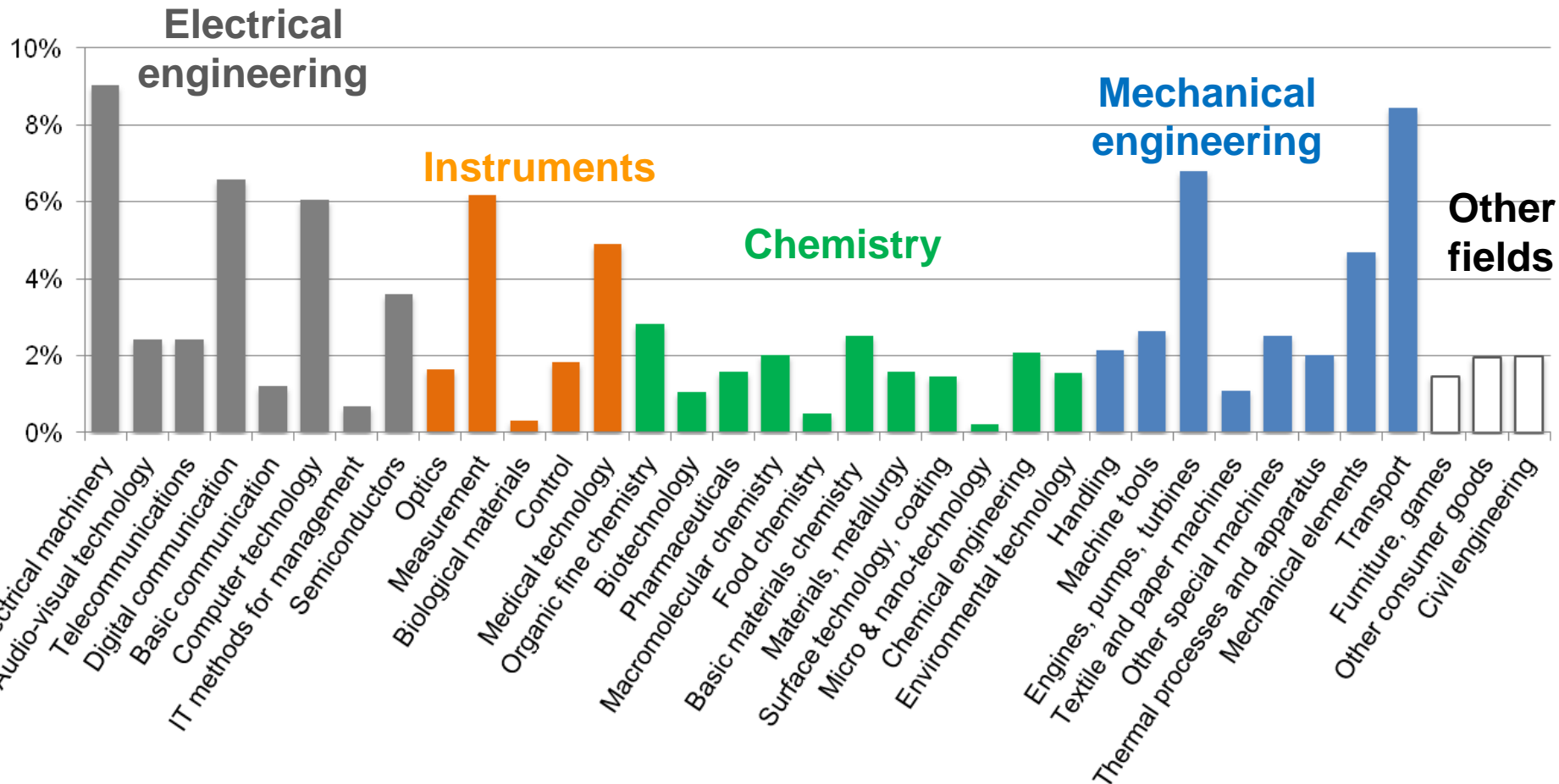
R&D networks

- How R&D collaboration is set?
- Which is the role of SMEs and public research in R&D networks?
- What would make Europe a friendlier environment for R&D collaboration?

Patent propensity of the 2013 Scoreboard companies by main industries

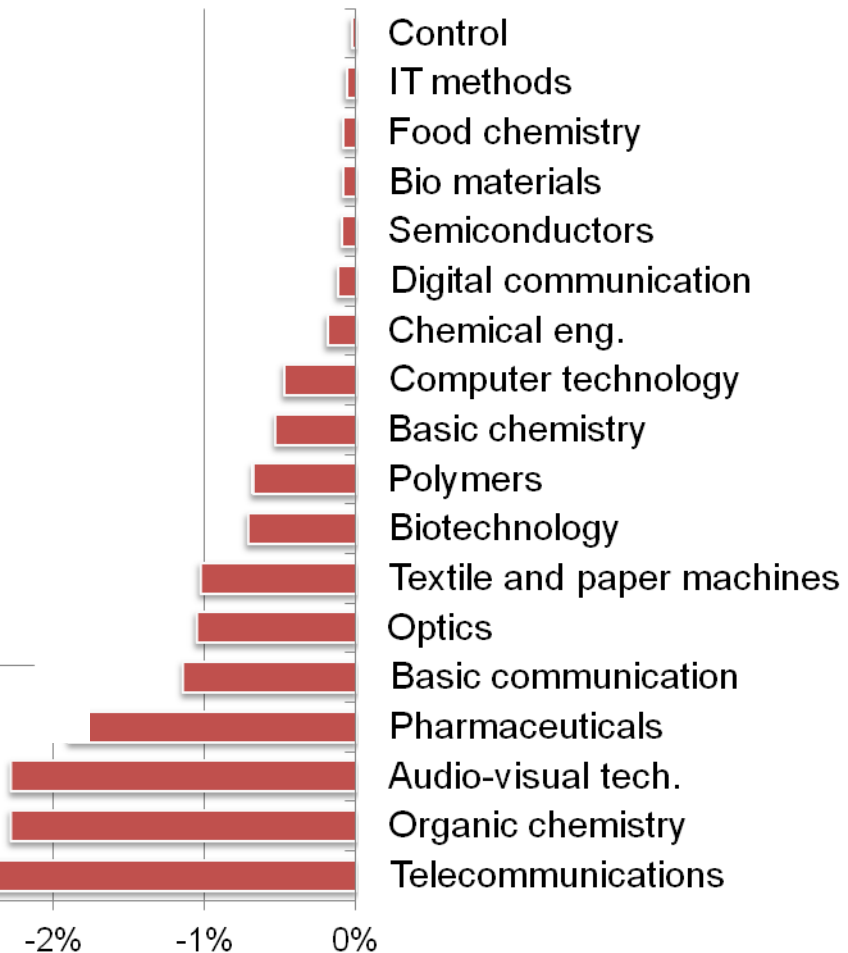
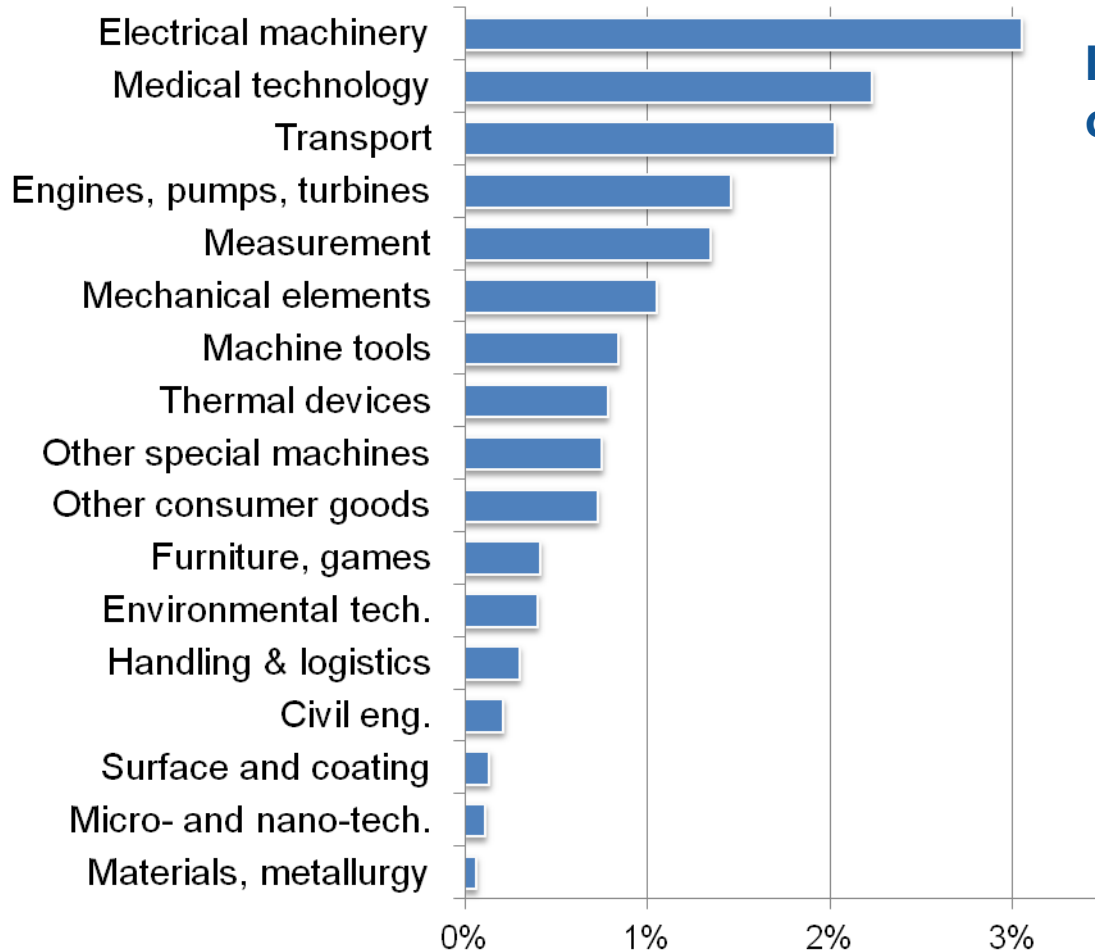


Distribution of patents across technological fields in Europe





Increasing contribution to the overall patents (from 2000/02)



Decreasing contribution to the overall patents (from 2000/02)

Corporate R&D investments and key technologies

- What is the distribution between Research and Development activities?
- What are the main knowledge sources for the development of new technologies?
- Which new technologies will be critical in the next future?
- What could improve the position of the EU in the development of new technologies?



European
Commission

***Thank you
for your
attention***