

Policy implications of existing evidence on corporate R&D Scoreboard: the case of Portugal

Are further evidence and policy measures needed?

Workshop: Corporate R&D investment for the support of EU's long-term competitiveness in a context of green and digital transition

Panel 3

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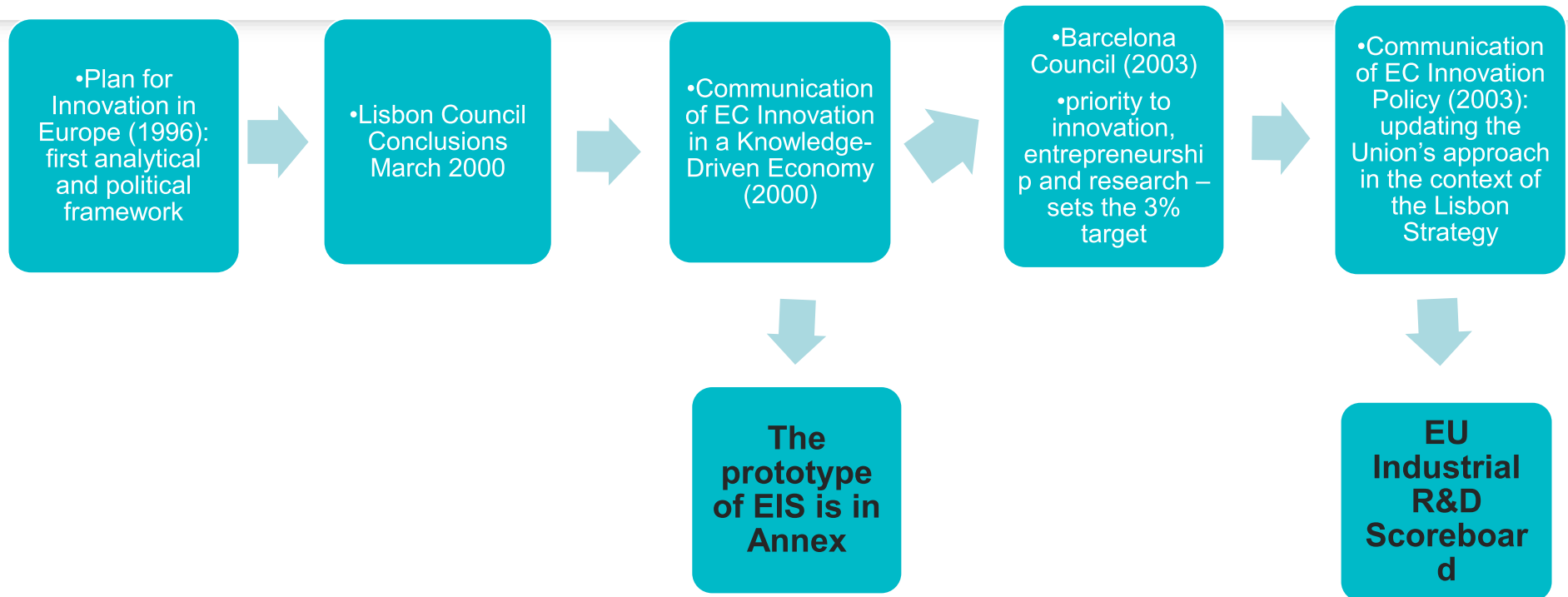
Senior Advisor to the Board of Directors
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Agenda (co-owner)



Two scoreboards are part of Lisbon Strategy and ERA:

1) EU Innovation Scoreboard (EIS)

2) EU Industrial R&D Scoreboard



EU industrial R&D Scoreboard

- This Scoreboard has been regularly published since 2004 (20 editions).
- No major methodological changes were noticed like what happens, by policy cycles, with EIS.
- Since beginning: accompanied by analytical work and regular exchanges with scholars in workshops and conferences.
- Policy impact at the Member States level is far less obvious than EIS as is less visible, and is not used in other EU policy documents and measures.
- A quick search in the news shows more interest from global companies rather than Member States.
- Prime Ministers and Ministers are not so eager to know the results of their country on the Scoreboard. But they should...

The EU Industrial R&D Scoreboard in Portugal

The only article mentioning Scoreboard on a PT newspaper - BIAL (2017)

Segundo os dados divulgados no "The 2017 EU Industrial RD Investment Scoreboard", publicado pela Comissão Europeia, a farmacêutica nortenha é a empresa portuguesa com maior investimento em I&D, ocupando a 445.ª posição no ranking das mil empresas europeias que mais investem nesta área, numa lista onde surgiram também a Caixa Geral de Depósitos, a EDP e o Crédito Agrícola.



But a longitudinal analysis of the presence of Portuguese companies in the Scoreboard and their sectors is telling (but not told!)

Company	Sector	Number of years	Period
CGD	Bank	15	since 2008
EDP	Energy	15	Since 2008
Bial	Pharmaceuticals	13	since 2009
CCA	Bank	13	since 2010
Portugal Telecom	TIC	8	2005-2016
NOVABASE	Software	7	2009-2015
CTT	PTT	4	Since 2019
SEMAPA	Pulp and Paper	3	2006-2014
Brisa	Industrial transportati	2	2010- 2011
Martifer	Construction	1	2010

Despite visions and remedies over the last two decades...

EU trajectories remained unchanged

Middle-technology trap?

Nature 2007

CPER 2024

Von Tunzelmann highlights several factors that make it difficult to draw broad conclusions from the scoreboard. Eastern Asia and the United States tend to dominate the most research-intensive industries, whereas European countries have traditionally **been stronger in 'medium-tech'** sectors such as automotive production and bulk chemicals.



Reforming innovation policy to help the EU escape the middle-technology trap

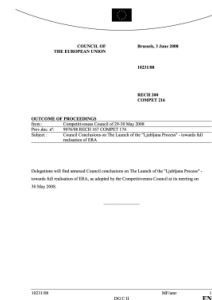
Clemens Fuest, Daniel Gros, Philipp-Leo Mengel, Giorgio Prevedini, Jean Tirole / 19 Apr 2024

Europe lags behind in innovation. This column describes how its industry seems stuck in a middle-technology trap in which it does not pay to leave the beaten path. The authors argue that EU innovation policy should support disruptive innovation to break this path dependency, but this needs profound reforms, both

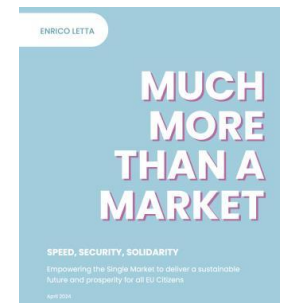
A fifth freedom for a new Single Market?

Conclusions, 2008

Letta Report for the Trio of Presidencies 2024



6. a) free movement of knowledge, the **'fifth freedom'**, with excellent training and attractive career prospects for researchers moving and interacting freely across Europe;



New policy developments?

- There are already preliminary developments worth exploring to capture the dynamics of the EU internal market as larger companies are not enough
 - Mid-caps + Start-ups
- Increase the policy impact and visibility with wider coverage of the Union and answer/alert policymakers
- Is it possible to compare or analyse what both scoreboards are measuring (corporate and EIS)?

Thank you!

This presentation has benefitted from the comments of Manuel Mira Godinho (University of Lisbon) with whom I am working on the analysis of the European Innovation Scoreboard.