The challenge of evidence on industrial transformation to underpin R&I policies

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Objective of the EU R&D Scoreboard

- ✓ **Policy monitoring** tool with a focus on **the global tech race and R&D resilience.**
- ✓ **Understanding the EU position vis-à-vis global competitors – R&D investments, tech engagement.**
- ✓ **Offering a Green transition angle (low-carbon/circular technologies, SDGs).**
- ✓ **Providing an R&D investment database** that companies, investors, researchers, national and local policymakers can use.

20th edition

Policymaking – input and output

European Research Area

New European Innovation Agenda

Recovery & Resilience Plans

EU Economic Security

Risk Assessment of critical technologies

Chips Act

Net Zero Industry Act

Critical Raw Materials Act

Responding to crisis situations
COVID-19
RU in UA
Supply chain disruptions
Dependencies – CRM, basic chemicals, medicines

Single Market
- setting Framework conditions for business – 4 freedoms - long-term orientation
Impact Assessment

European Green Deal – Climate, energy, environment
Digital Decade 2030 – supply and use of digital technologies
EU targets for 2030 and 2050
SDGs

Industrial Strategy

R&I Policy

Strategic nature of R&D investments

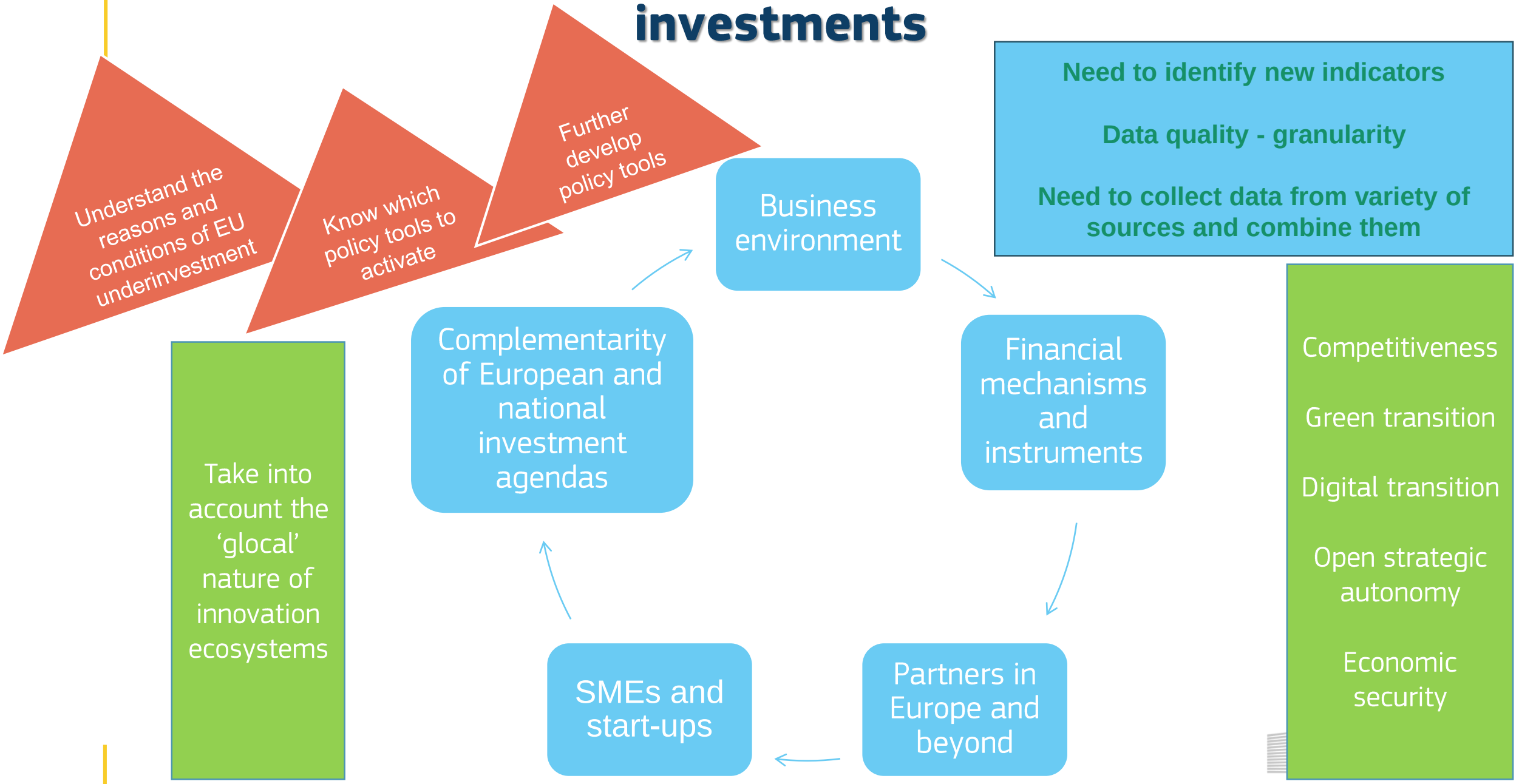
Long-term competitiveness in the twin transition context

Monitoring private sector/corporate R&D investments

Relevance of the territorial dimension of R&D Investments

European Commission

Increase and acceleration of private R&D&I investments



Industrial R&D Investments – some questions

1. EU hosts 367 of the 2,500 world top R&D investors headquartered across 17 countries.

2. EU sectoral distribution shows a broader representation of industrial sectors among R&D investors. There are 12 companies in the top 50.

3. Highest share in the EU for the automotive sector, worldwide it is ICT (services) and pharma/biotech.

4. Overall R&D intensity in the EU is 3,8%, in US 7,9%, China 10,7% (Japan also 3,8%).

5. EU top 1000 R&D investors include 18% SMEs, about two thirds from the health sector.

Should we stick to headquarter data and should we continue to find ways to link this better to what is happening in the countries? (link to BERD) and in value chains?

Is the broad EU sectoral distribution of R&D investors an asset or is it a reason for a disadvantage as we see EU lags behind US and China in the top R&D sectors?

Why is EU industry investing less than others? What would incentivise more investments?

What impact do EU/national/regional policies have on R&D investments?

Shall we study more the role of SMEs?

Shall we study engagement in strategic technologies and critical raw materials linked to corporate R&D investment strategies?

Thank you

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