

27 January 2015

## **Innovation in Companies Survey** Year 2013. *Final results*

### **Main results**

- Expenditure on technological innovation registers 13,233 million euros in 2013, with a 1.3% decrease as compared with the previous year.
- 26.0% of Spanish companies with 10 or more employees are innovative during the 2011-2013 period. This percentage includes technological (product or process) and non-technological (organisational and commercial) innovations.
- 13.2% of Spanish companies with 10 or more employees were technologically innovating and 20.4% are non-technologically innovating during the 2011-2013 period.
- The Autonomous Communities that go to the greatest expense in performing technological innovation activities in 2013 are Comunidad de Madrid (33.7% of the total expenditure), Cataluña (23.4%) and País Vasco (10.8%).

### **Expenditure on technological innovation**

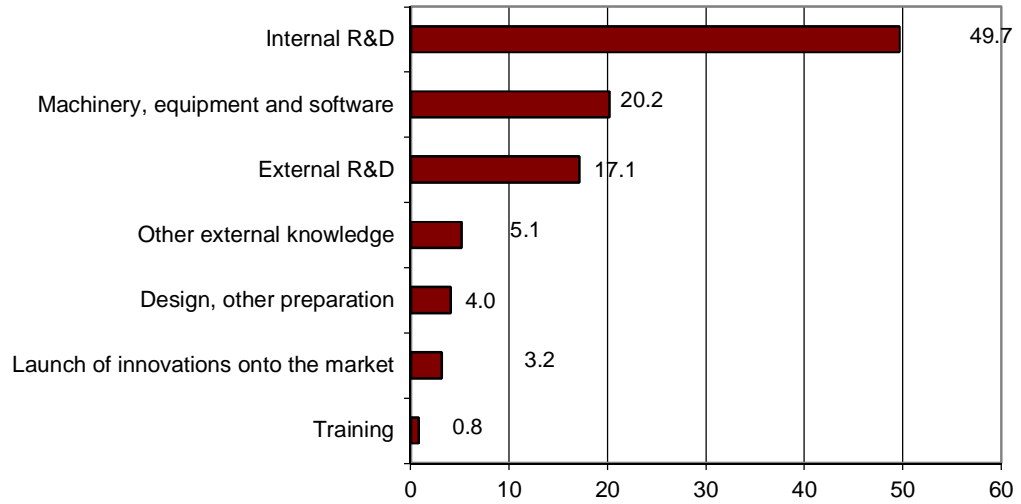
Expenditure on technological innovation activities reached 13,233 million euros in 2013, representing a decrease of 1.3%, as compared with the year 2012. This figure represented 1.8% of turnover of the companies with 10 or more employees that carried out technological innovation activities in 2013.

Among the innovative activities<sup>1</sup>, worth noting were *internal R&D activities* (representing 49.7% of total expenditure on technological innovation activities) *Acquisition of machinery, hardware equipment and software* (20.2%) and *external R&D activities* (17.1%).

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<sup>1</sup> These are specified in the methodological note.

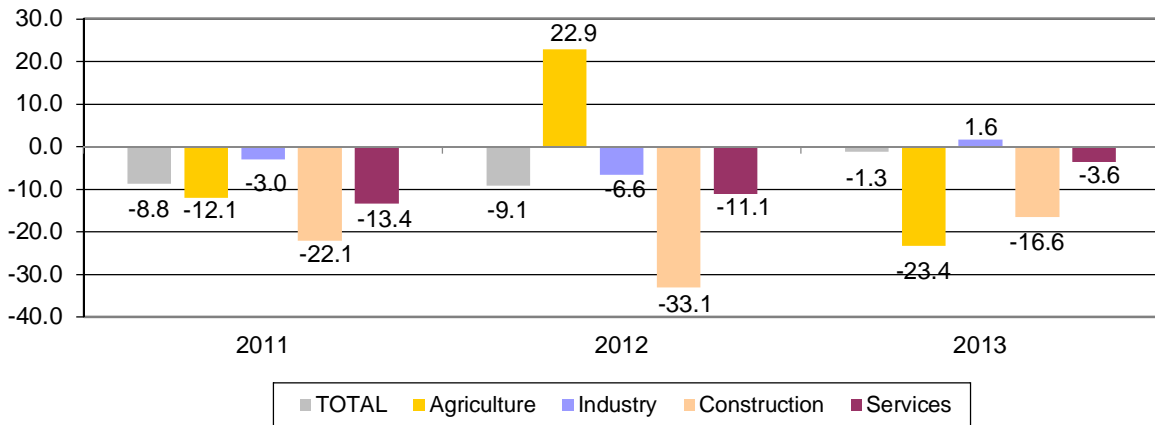
**Distribution of expenditure on technological innovation activities by type of expenditure, as a percentage. Year 2013**



**Expenditure on technological innovation by sectors and activity branch**

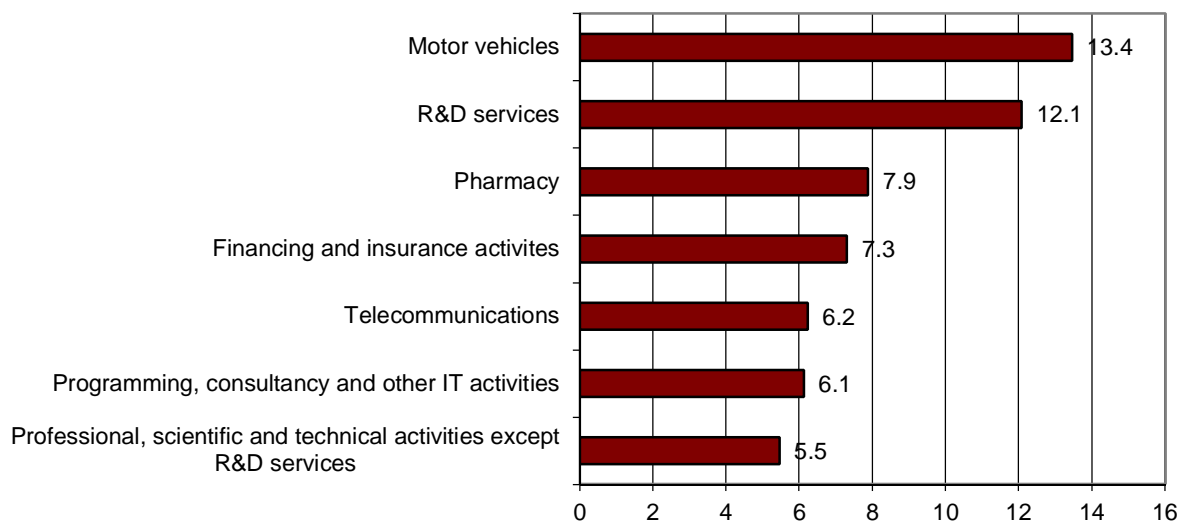
By sectors, expenditure on technological innovation increased 1.6% in *Industry* in 2013. In turn, the expenditure decreased 23.4% in *Agriculture*, 16.6% in *Construction* and 3.6% in *Services*.

**Variation rate on technological innovation expenditure by activity sector. 2011-2013 period**



By activity branch, the enterprises in *Motor vehicles* represented the greatest percentage of the total expenditure on technological innovation (13.4%), followed by the enterprises in *R&D Services* (12.1%) and *Pharmacy* (7.9%).

**Distribution of the expenditure on technological innovation by activity branch, as a percentage. Year 2013**



**Expenditure on technological innovation by Autonomous Community**

The Autonomous Communities with the greatest expenditure on technological innovation in 2013 were Comunidad de Madrid (33.7% of total national expenditure), Cataluña (23.4%) and País Vasco (10.8%).

The expenditure on technological innovation was reduced, as compared to the previous year, in every Autonomous Community, except for Comunitat Valenciana (which registered an increase of 92.0%), Illes Balears (8.1%) and Andalucía (0.8%).

**Technological innovation by Autonomous Community. Year 2013**

	Companies with innovating activities (*)	Expenditure on technological innovation (**)		
		Total (thousands of euros)	%	% variation
<b>TOTAL</b>	<b>16,119</b>	<b>13,233,291</b>	<b>100.0</b>	<b>-1.3</b>
Andalucía	1,669	873,910	6.6	0.8
Aragón	561	255,867	1.9	-30.7
Asturias, Principado de	347	136,739	1.0	-4.5
Balears, Illes	254	38,091	0.3	8.1
Canarias	405	64,117	0.5	-11.8
Cantabria	172	52,728	0.4	-28.6
Castilla y León	780	474,466	3.6	-15.9
Castilla-La Mancha	510	171,002	1.3	-21.4
Cataluña	3,551	3,095,168	23.4	-6.5
Comunitat Valenciana	1,822	1,197,835	9.1	92.0
Extremadura	278	41,572	0.3	-6.9
Galicia	1,066	482,360	3.6	-20.5
Madrid, Comunidad de	3,098	4,465,794	33.7	-0.1
Murcia, Región de	412	134,139	1.0	-11.5
Navarra, Comunidad Foral de	425	274,248	2.1	-5.3
País Vasco	1,823	1,425,666	10.8	-5.9
Rioja, La	200	45,180	0.3	-12.3
Ceuta	4	2,400	0.0	608.2
Melilla	6	2,008	0.0	143.1

(\*) A company can carry out innovating activities in more than one Autonomous City or Community

(\*\*) In the Autonomous City or Community where the expenditure is carried out

### Innovating companies during the 2011-2013 period

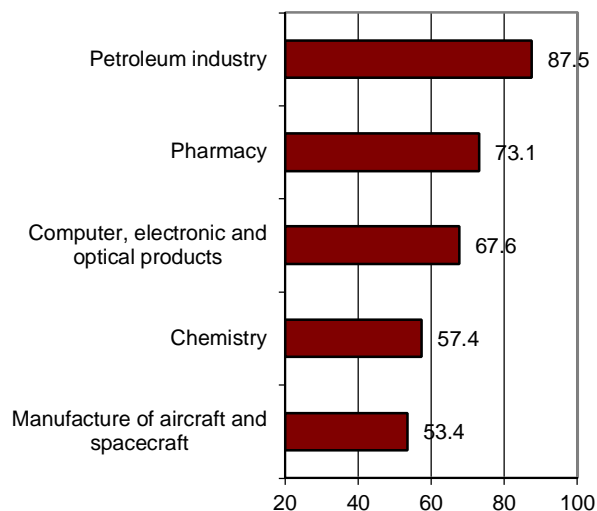
26.0% of Spanish companies with 10 or more employees were innovative during the 2011-2013 period, including technological (product or process) innovations and non-technological (organisational or commercial) innovations.

### Innovating companies during the 2011-2013 period by activity branch

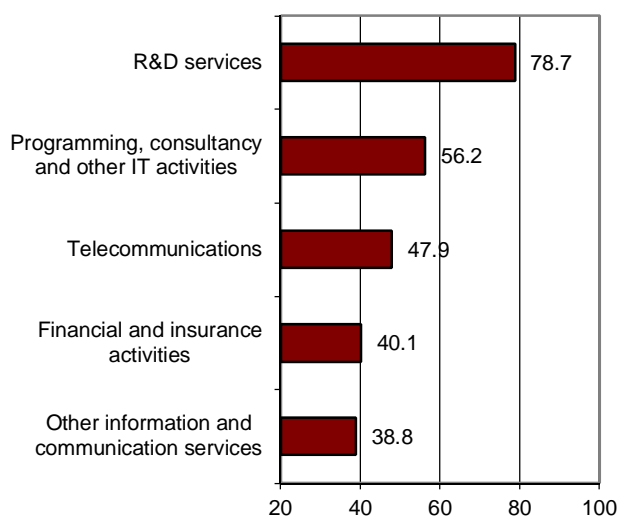
The activity sectors that had the highest percentage of innovating companies in the *Industry* sector were *Petroleum Industry* (87.5%), *Pharmacy* (73.1%) and *Computer, electronic and optical products* (67.6%).

In the *Services* sector it is worth noting *R&D Services* (78.7% of innovating companies), *Programming, consultancy and other computer activities* (56.2%) and *Telecommunications* (47.9%).

**Percentage of innovating companies in the 2011-2013 period in the Industry sector**



**Percentage of innovating companies in the 2011-2013 period in the Services sector**



### Innovating companies during the 2011-2013 period by Autonomous Community

The Autonomous Communities with the greatest percentage of innovating companies during the 2011-2013 period were La Rioja (29.7% of innovating companies), País Vasco (29.3%) and Cataluña (29.1%).

### Innovating companies in the 2011-2013 period by Autonomous City or Community

	Innovating companies		Companies with technological innovations (*)		Companies with non-technological innovations (**)	
	Total	%	Total	%	Total	%
<b>TOTAL</b>	<b>38,092</b>	<b>26.0</b>	<b>19,370</b>	<b>13.2</b>	<b>29,840</b>	<b>20.4</b>
Andalucía	4,399	21.6	1,791	8.8	3,653	17.9
Aragón	1,077	24.0	599	13.4	847	18.9
Asturias, Principado de	631	22.7	344	12.4	459	16.5
Balears, Illes	772	20.3	288	7.6	632	16.6
Canarias	1,318	21.7	579	9.5	1,101	18.1
Cantabria	380	23.2	220	13.5	282	17.3
Castilla y León	1,492	23.4	850	13.3	1,080	16.9
Castilla-La Mancha	1,120	22.2	546	10.8	898	17.8
Cataluña	8,206	29.1	4,057	14.4	6,580	23.3
Comunitat Valenciana	4,296	28.8	2,302	15.4	3,330	22.3
Extremadura	552	23.4	255	10.8	408	17.3
Galicia	2,064	25.6	1,136	14.1	1,520	18.8
Madrid, Comunidad de	6,993	28.3	3,459	14.0	5,565	22.5
Murcia, Región de	1,092	23.7	515	11.2	861	18.7
Navarra, Comunidad Foral de	716	28.2	454	17.9	508	20.0
País Vasco	2,580	29.3	1,726	19.6	1,823	20.7
Rioja, La	357	29.7	232	19.3	253	21.1
Ceuta	23	16.1	5	3.6	22	15.4
Melilla	23	15.5	13	8.9	18	12.3

Note: Percentages calculated on the number of companies with 10 or more employees in each Autonomous City or Community.

(\*) Companies with product and/or process innovations.

(\*\*) Companies with organizational and/or commercial innovations.

### Companies with technological innovations during the 2011-2013 period

With regard to technological innovations, 13.2% of Spanish companies with 10 or more wage earners were product or process innovating in the 2011-2013 period, whilst the technologically innovating companies or companies with technological innovations underway or unsuccessful ones (EIN) represented 15.7%.

Innovation in product represented in the 2011-2013 period 34.1% of the sales in 2013 in the product innovating companies. This percentage is composed by 14.6% considering products that represented an innovation in the market and 19.4% if they are considered as innovating products exclusively for the company.

In turn, the figure of business due to products without modifications or slightly modified represented 65.9% of the total of the business figure of product innovating companies.

In contrast, 26.7% of EIN companies collaborated in technological innovating activities during the 2011-2013 period.

### Companies with technological innovations during the 2011-2013 period by activity branch

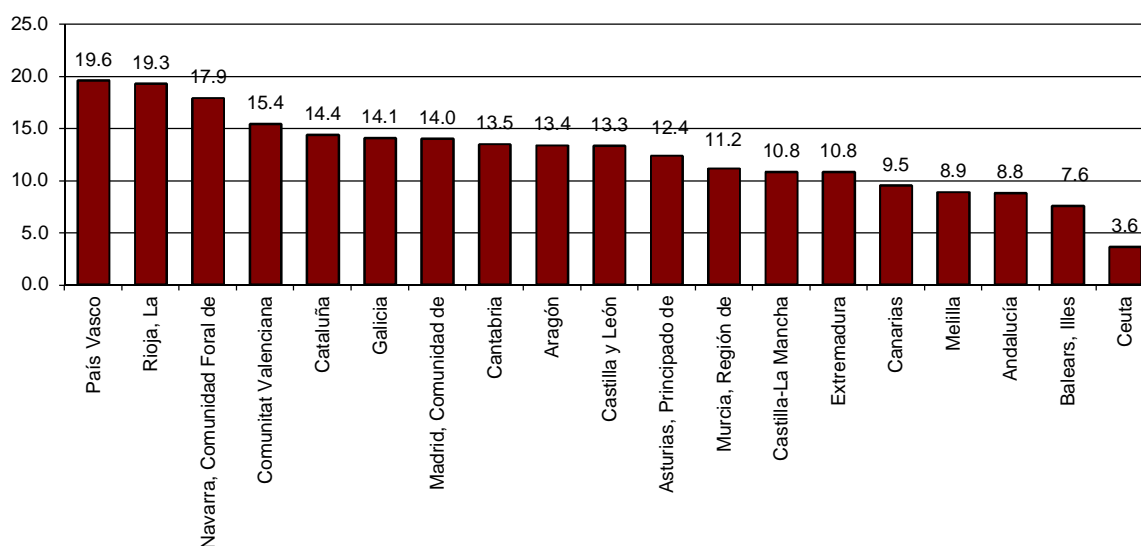
The branches with the greatest percentage of technological innovating companies in the industrial sector were *Petroleum industries* (87.5%), *Pharmacy* (59.4%) and *Computer, electronic and optical products* (56.7%).

In the *Services* sector, worth noting were the branches of *R&D Services* (63.9% of technological innovating companies), *Programming, consultancy and other computer activities* (43.1%) and *Telecommunications* (35.5%).

### Companies with technological innovations during the 2011-2013 period by Autonomous Community

The Autonomous Communities that presented the greatest percentages of technological innovating companies during the 2011-2013 period were País Vasco (19.6% of its companies introduced technological innovations during this period), La Rioja (19.3%) and Comunidad Foral de Navarra (17.9%).

**Percentage of technological innovating companies by Autonomous City or Community. 2011-2013 period**



### Information sources and objectives for technological innovation

51.4% of EIN companies considered internal information sources (within the company or group) to be of the greatest importance for carrying out innovation projects.

In turn, 46.7% of EIN companies believed market sources (suppliers, clients, competitors, etc.) to be highly relevant.

48.9% of EIN companies expressed that a priority objective of their innovative activities was to increase the quality of goods or services. 40.6% indicated as a main goal to extend the range of goods or services.

### **Companies with non-technological innovation in the 2011-2013 period**

Regarding non-technological innovations, 20.4% of Spanish companies with 10 or more age earners carried out organisational or commercial innovations in the 2011-2013 period.

Within non-technological innovations, 16.2% of the total number of companies carried out organisational innovations in the 2011-2013 period. The objectives they declared as most relevant for carrying out organisational innovations were the superior quality of their goods or services (with 56.5%) and reduction in the periods of response to customer or supplier needs (with 51.3%).

On the other hand, the percentage of companies with commercial innovations was 11.5% of the total number of companies. Companies with organisational innovations indicated as a priority objective the increasing or improving market quota (48.0%) in order to carry out this type of non-technological innovation.

### **Companies with non-technological innovation in the 2011-2013 period by activity branch**

In the *Industry* sector, the branches with the greatest percentage of non-technological innovating companies were *Petroleum Industry* (75.0%), *Pharmacy* (56.8%) and *Manufacture of aircraft and spacecraft* (49.0%).

In the *Services* sector it was worth noting *R&D Services* (58.4%), *Programming, consultancy and other computer activities* (41.0%) and *Telecommunications* (36.2%).

### **Companies with non-technological innovation in the 2011-2013 period by Autonomous Community**

The Autonomous Communities that presented the greatest percentages of non-technological innovating companies during the 2011-2013 period were Cataluña (23.3% of the companies had non-technological innovations during this period), Comunidad de Madrid (22.5%) and Comunitat Valenciana (22.3%).

## Methodological note

The Innovation in Companies Survey is a study which is integrated in the European Union statistics plans, the objective of which is to provide information on the so-called technological innovation process, compiling indicators that allow for ascertaining the different aspects of this process (economic impact, innovative activities, cost, etc.) It is a **study targeting** a sample of **more than 39,300 companies with 10 or more employees**, from the industrial, construction and services sectors, including for the first time in 2006, research in the branch of agriculture, livestock breeding, hunting, forestry and fishing.

**Innovative activities** are all types of scientific, technological, organisational, financial and commercial activities, including the investment in new knowledge, which actually or potentially leads to the implementation of innovations. Parting from this definition, it is possible to distinguish two types of innovation: technological innovation and non-technological innovation.

**Technological innovations** include technologically new products (goods or services) and processes, as well as significant technological improvements to them. An innovation is considered as such when it has been launched onto the market (product innovation) or it has been used in the production process of goods or in the rendering of services (process innovation). The technological innovations referred to in this study are from the three years prior to conducting the Survey (2011-2013 period).

**Technological innovation activities** constitute the set of activities leading to the development or introduction of technological innovations. They include the following seven activities:

- *Scientific research and technological development (internal R&D)*
- *R&D acquisition (external R&D)*
- *Acquisition of machinery, equipment and software*
- *Acquisition of other external knowledge*
- *Training*
- *Introduction of innovations on the market*
- *Other preparations for production and/or distribution*

Technological innovation activities refer to the year immediately prior to conducting the Survey (year 2013).

**Non-technological innovations** comprise new methods of marketing products (goods or services) or new methods of organisation of business codes implemented by companies, as well as significant improvements in existing methods. Likewise, these innovations refer to the 2011-2013 period.