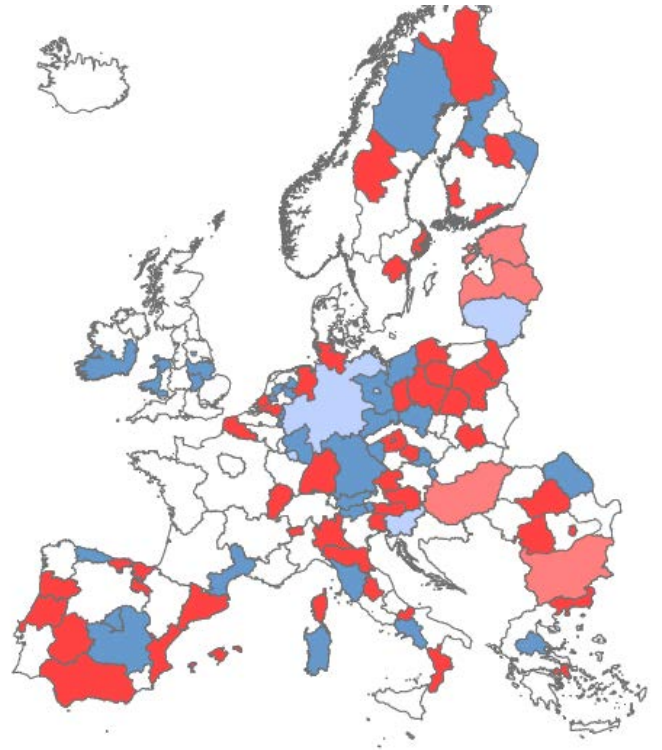

RESULTS OF THE 2018 RIS3 SURVEY REVIEW AND OUTLOOK BEYOND 2020

Henning Kroll,
supported by Axel Gruner



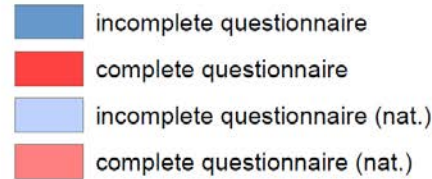
© istockphoto.com/ooyoov



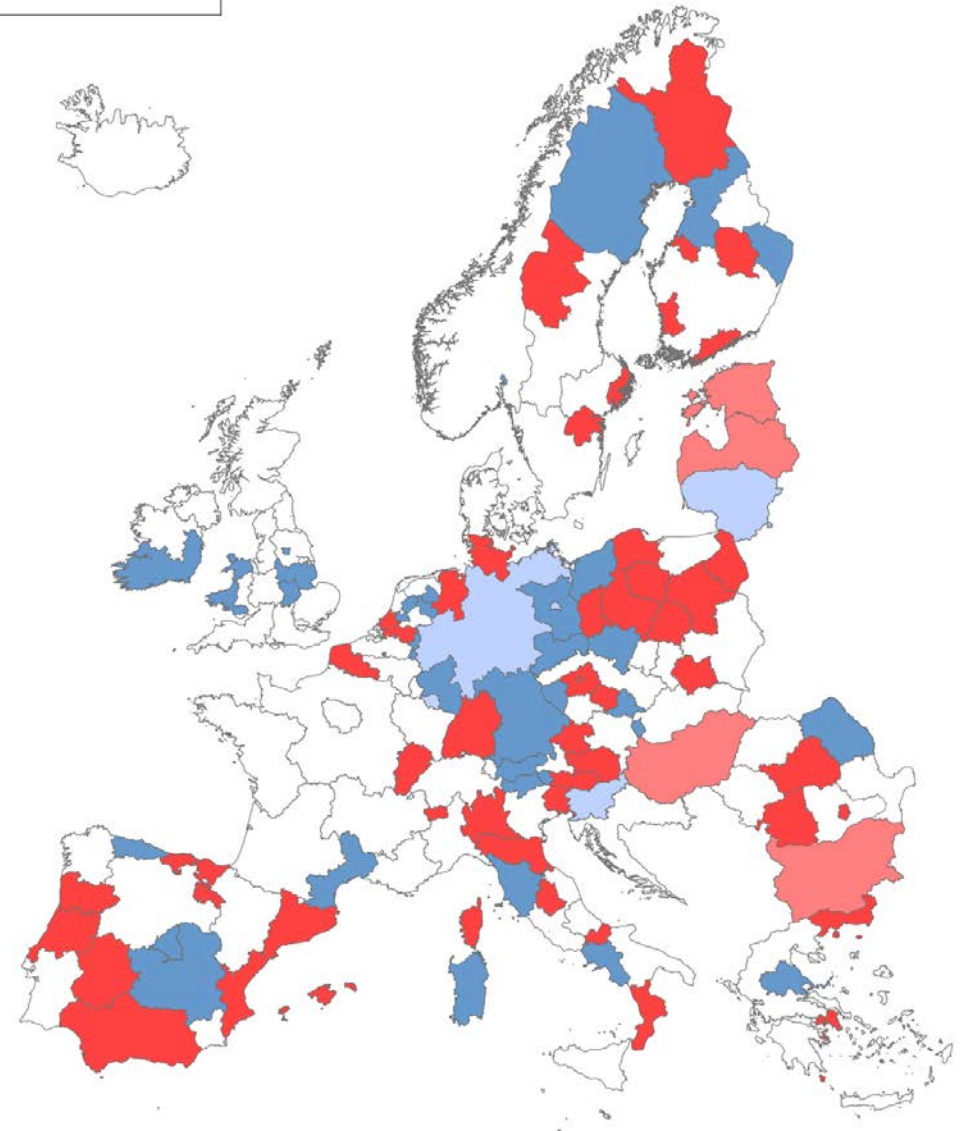
© shutterstock.com/Peshkova

Survey Approach

2018 Survey Coverage



- ❖ addressed stakeholders from public administration, focus on regional level
- ❖ based on public address data and JRC support
- ❖ data collected between May and July 2018
- ❖ 6th survey of its kind coverage comparable to earlier rounds
- ❖ short set of questions, to be completed in 10-15 minutes



Executive Summary

- ❖ Many current strategies are seen as limited by design
 - ❖ many report consequential development, fewer real consistency of document
 - ❖ instrumentation remains the weakest point, more so in already weak regions
 - ❖ key obstacles: coordination, cognitive barriers and conflicts about resources
- ❖ Hence, many policy makers see a strong need to update existing strategies
 - ❖ however, only one third have so far started activities to prepare post 2020
 - ❖ political distractions and science-push mindsets remain widespread
 - ❖ still, many express hope that renewed efforts would have an effect
 - ❖ but a new ex-ante conditionality is considered necessary to trigger action
- ❖ In less developed regions, strategies are seen as having been less effective
 - ❖ limiting framework conditions in the East and South-East are found confirmed (limited administrative capacities, poor surrounding Triple-Helix, etc.)
 - ❖ on the upside, cooperative relations with other regions are welcomed, and
 - ❖ the European Commission is seen as a constructive partner

Detailed Findings on Quality of Existing Strategies

- **with a view to consequential, set-by-step development**
 - 50% of the respondents say that the strategy outlines a convincing narrative for change
=> i.e. *one logically derived from the actual economic situation*
 - 60% of the respondents say that the strategy's priorities have been well chosen
=> i.e. *logically derived from the overall strategy*
 - 40% of the respondents say that suitable measures were selected for implementation
=> i.e. *logically derived from the chosen priorities*
 - **this still leaves between 40 and 60% with notable reservations**
- **with a view to internal freedom of contradictions**
 - 45% of the respondents say that the overall vision is free of contradictions
 - 47% of the respondents say that the selection of themes forms a consistent whole
 - 31% of the respondents say that there is limited technical overlap between measures
 - **this still leaves between 50 and 70% with notable reservations**
- the following **reasons for shortcomings of past RIS3** were reported most commonly
 - **coordination issues**
 - **misunderstandings & cognitive barriers**
 - **conflicts about resources**

Detailed Findings on Status Quo and Future Outlook

- Hence, many perceive a **strong need to update the existing strategies**
 - close to 60% due to limitations by design,
 - more than 35% due to a lack of results, and
 - more than 40% due to changes in framework conditions
 - However, **many report remaining obstacles**
 - 47% see other strategies distracting attention from RIS3,
 - 44% suggest that their region still approaches RIS3 with a science-push mindset,
 - 44% suggest limited capacities to handle EDP, and
 - 35% see local science-government-industry collaboration is poorly developed
 - so far, only **one third report first activities aiming at the next support period, 44% say it would require a new conditionality** to set a process in motion
 - still, a **majority (>50%) think that renewed RIS3 efforts have a chance to solve or at least attenuate limitations** to strategy design and implementation
 - above 77% see the European Commission as a constructive partner,
 - above 85% their see relations with other regions as collaborative, and
 - most think positively about the recent EC support / pilot actions
-

Detailed Findings by Member State and/or Level of Development

Findings on the quality of strategies **confirm existing knowledge on differences** between Central, Southern and Eastern Europe.

1. Most very or **primarily positive views on the quality of strategies** still come from either Northern, Central or, sometimes, Southern European regions,
2. Central and Southern Member States' Regions are most optimistic about their **capacity to host future EDP** and draw adequate conclusions from them,
3. in the **Eastern and South-Eastern Member States coordination issues with and inside the Triple-Helix** are substantially more common,
4. problematic changes in **socio-economic framework conditions** are reported mostly from Southern and South-Eastern Europe, and
5. There is a **descending preference for interregional collaboration** from Northern to Central to Southern, to South-Eastern to Eastern Europe.
6. In consequence, there is a **striking difference in the perceived effectiveness of RIS3** between Central & Northern Europe (high) and Eastern & South-Eastern Europe (low)
 - in the coming years the challenge will be to also involve those with less local dynamism is more limited and **avoid a process dominated by Central and Northern Europe**
 - apparently, **changes in socio-economic conditions** have to be accounted for – **further efforts should be undertaken to understand their precise nature**

Detailed Findings by Member State and/or Level of Development

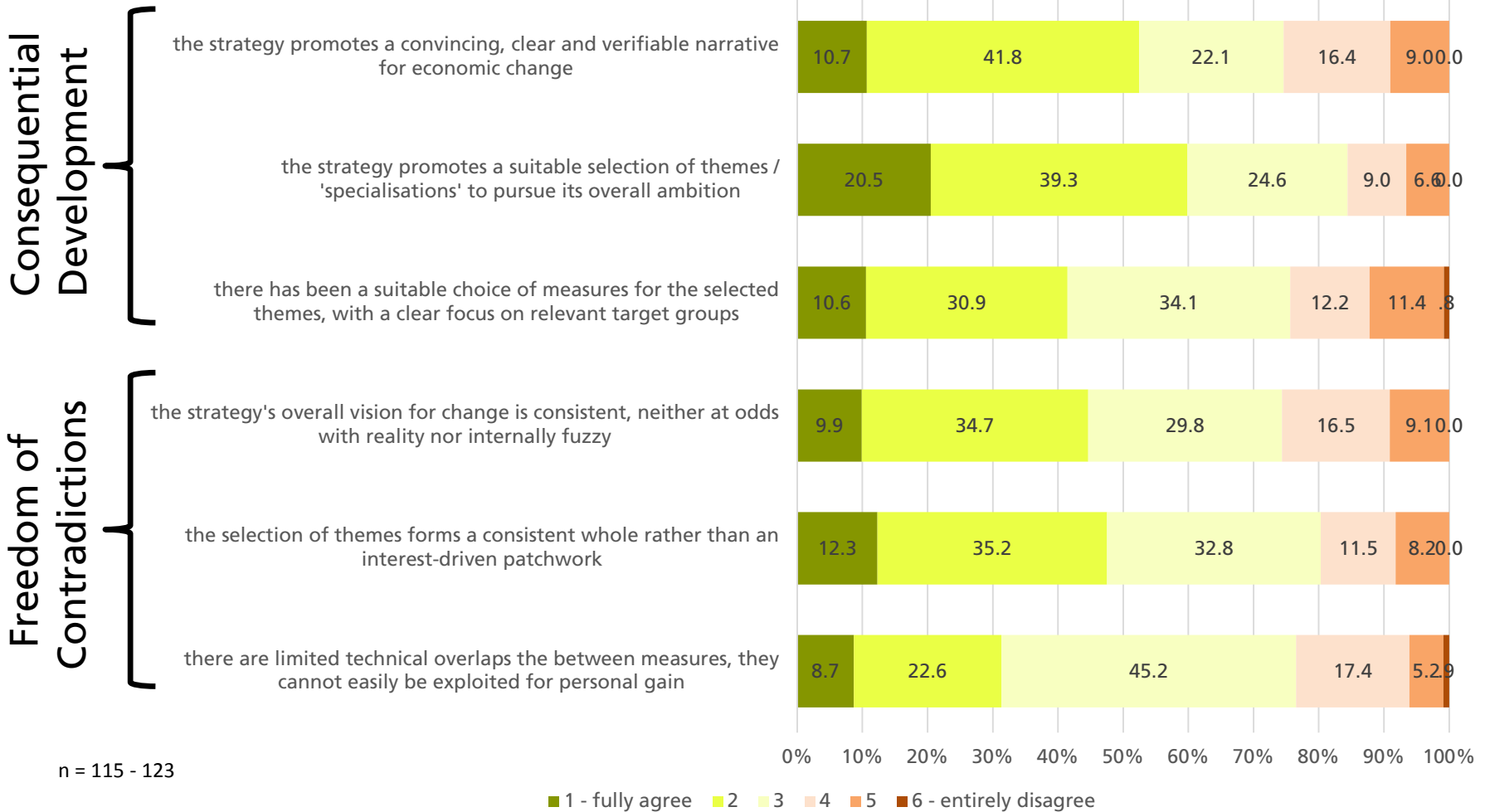
Nonetheless, obstacles to a new round of RIS3 do not only concern the periphery:

1. respondents report **limitations in the design** of strategies across all Member State Groups, this is not a particularity of weaker regions,
 2. many of the **common issues limiting RIS3 success are encountered across Europe**
 - **coordination issues *within administration*** are as common in leading regions of Central, Northern and Southern Europe rather than where processes fail,
 - changed **political framework conditions** are commonly reported from next to all areas except, interestingly, Eastern Europe,
 3. **interest can be lowest where things are already running best: in Central Europe**
 - a majority does not see a need for a renewed ex-ante conditionality,
 - some deny outright that things could or would change.
- apparently, it is still worthwhile and necessary to trigger joint efforts aiming at **finding procedures to deal with joint, or at least common, obstacles**
- **there is a continued need for activating efforts** to mobilise those that (feel they) could also succeed without European Commission support

GENERAL FINDINGS

Strategies' Quality

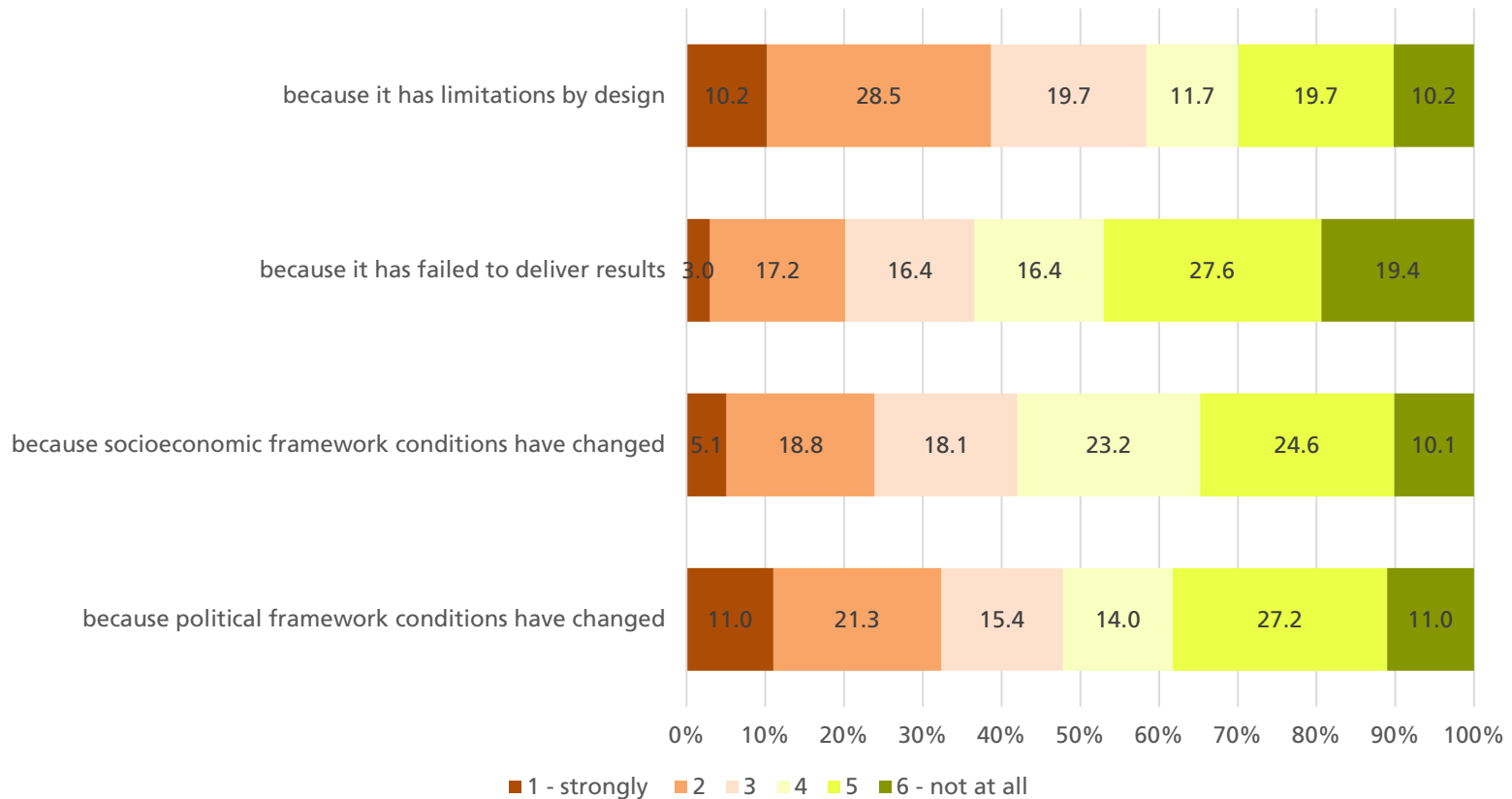
(on a scale from 1-6 with 1 = fully agree, 6 = entirely disagree)



n = 115 - 123

To what extent is your current innovation strategy in need of updating?

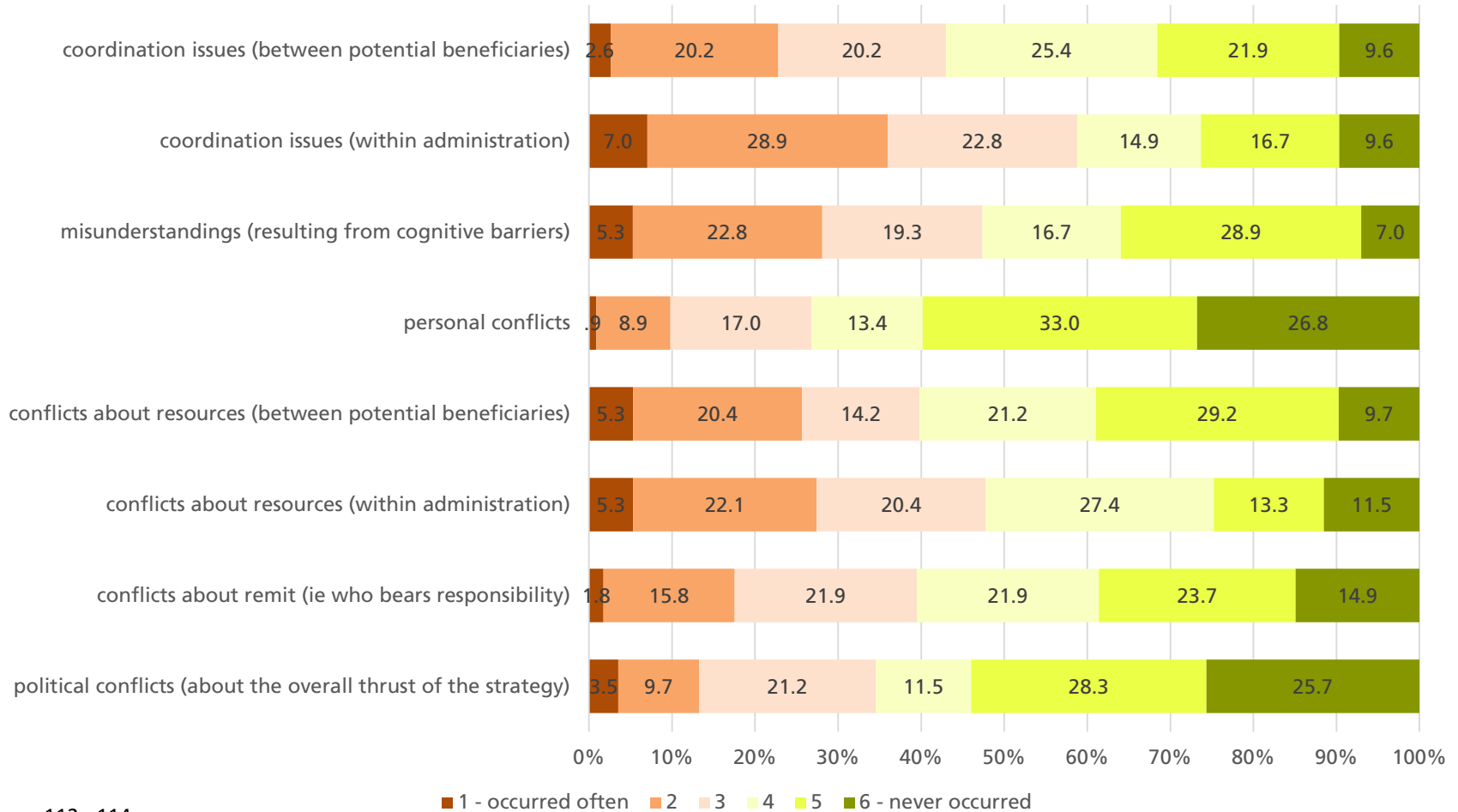
(on a scale from 1-6 with 1= strongly, 6= not at all)



n = 134-138

Conflicts and obstacles during past processes of strategy development

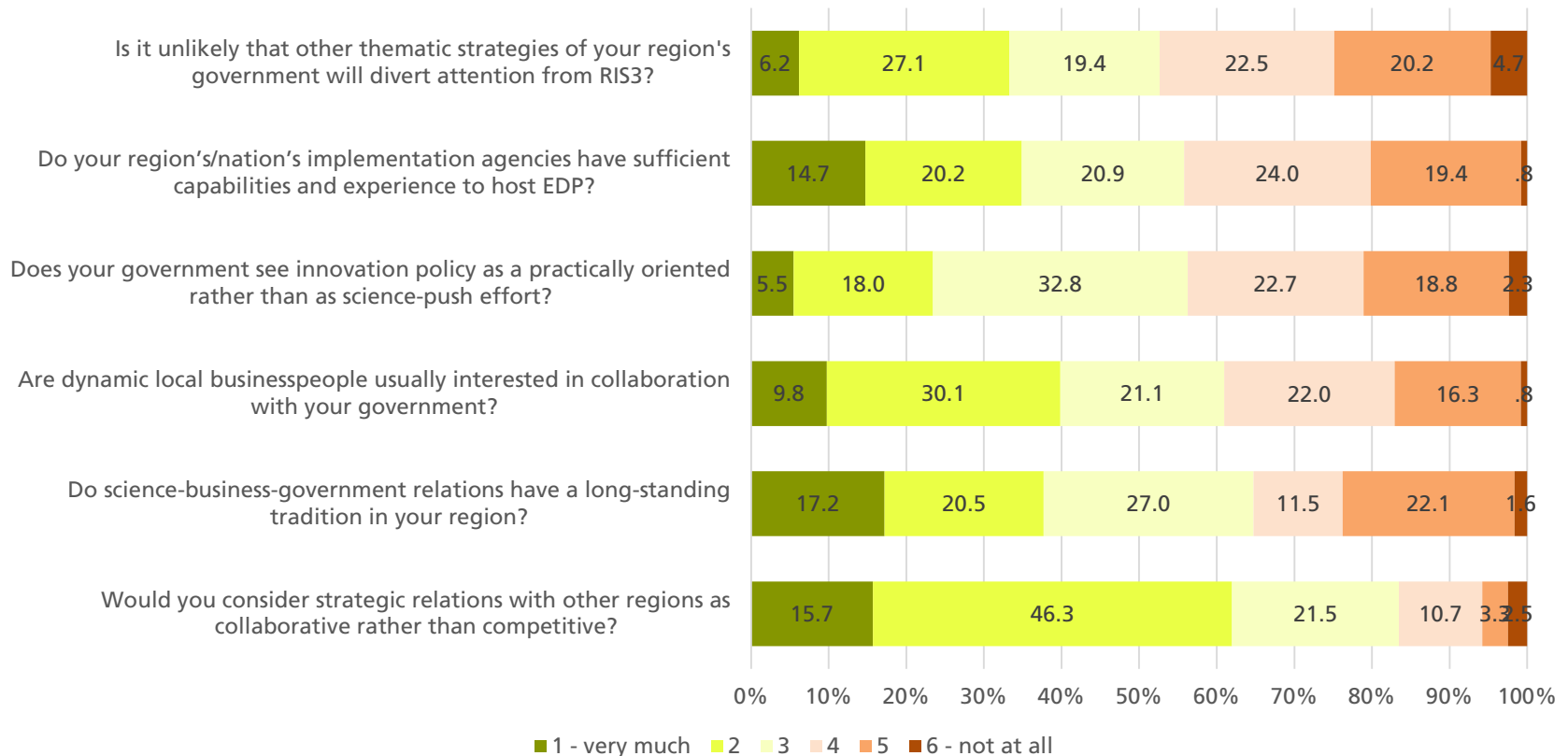
(on a scale from 1-6 with 1 = occurred often, 6 = never occurred)



n = 112 - 114

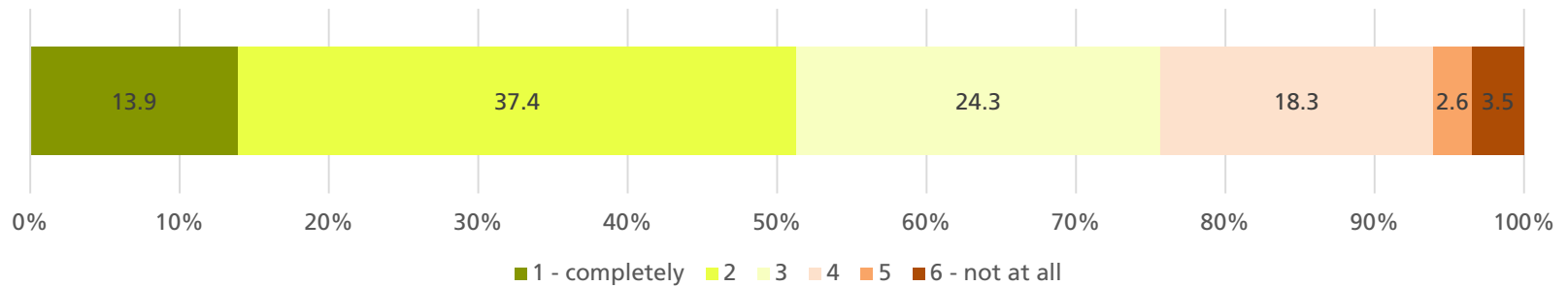
Other factors that could impede efforts to update current innovation strategies

(on a scale from 1-6 with 1= very likely, 6= not at all likely)

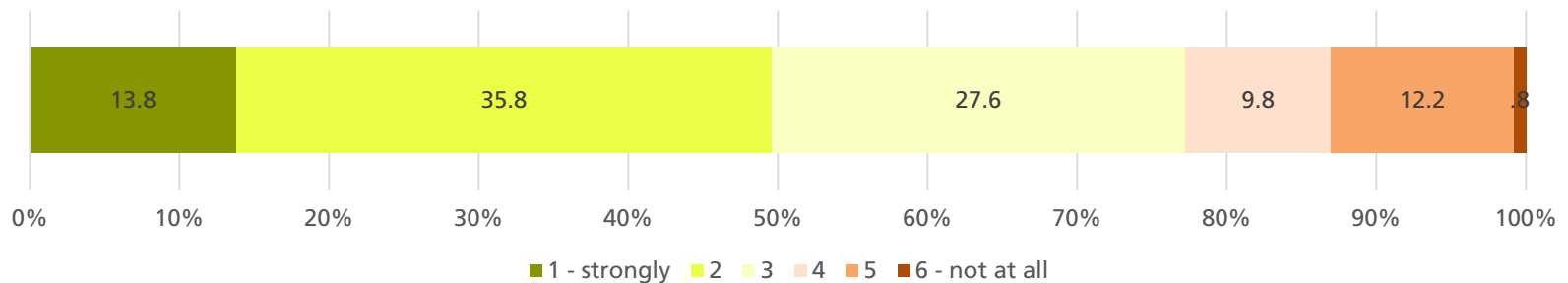


n = 121-129

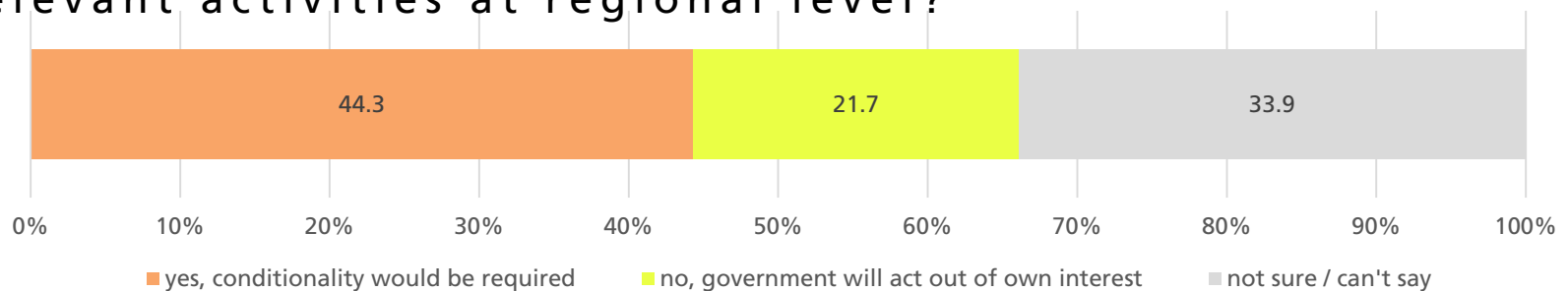
Do you believe that better processes and institutions can (help) fix these issues in your region in the future?



Do you perceive the European Commission as a constructive partner in innovation policy and business development?



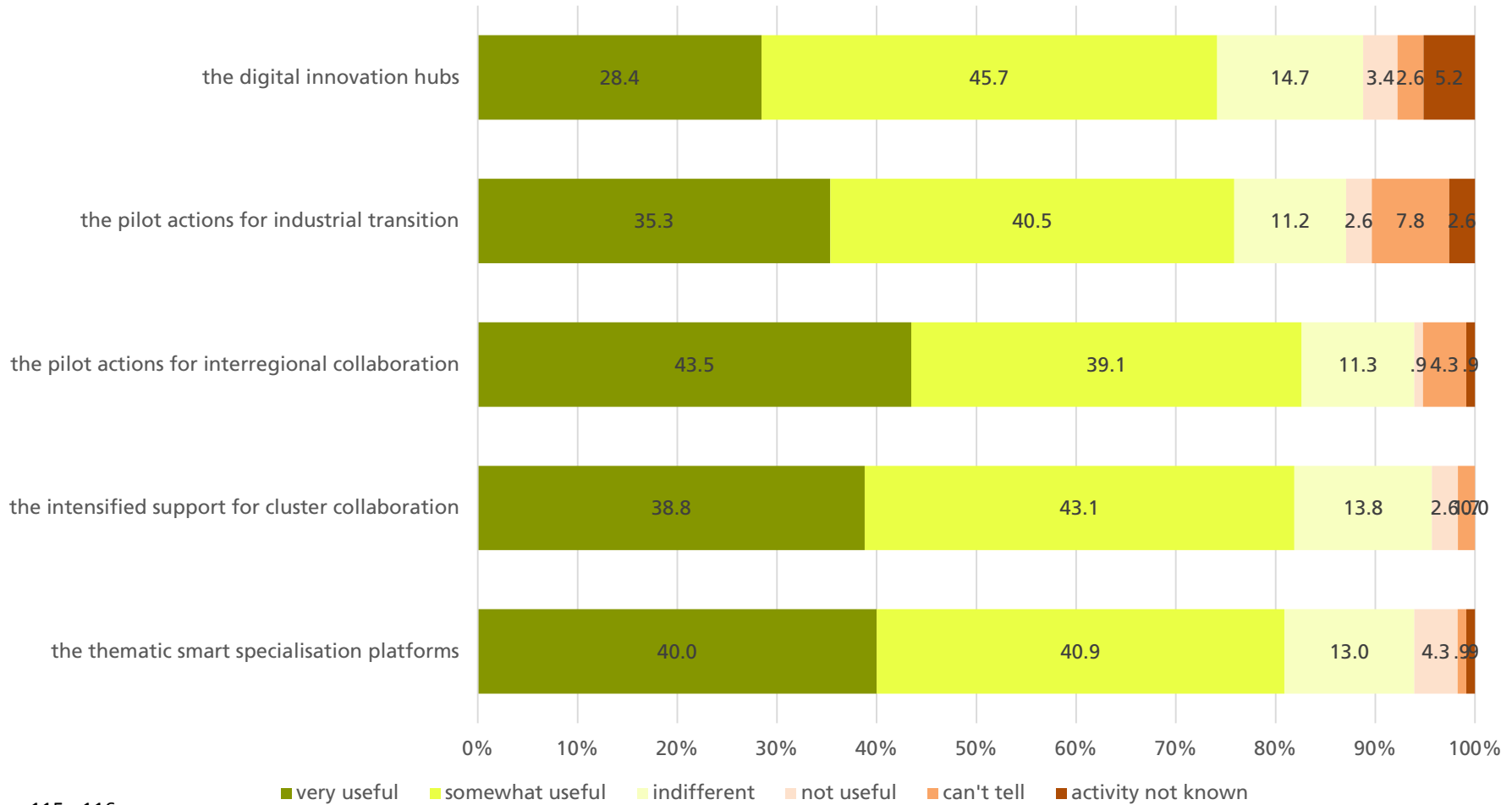
Would it take a new ex-ante conditionality to trigger relevant activities at regional level?



n = 115

Do you consider the following activities of the European Commission as useful to improve the design and implementation of innovation policy in your region/nation?

(on a scale from 1-6 with 1 = very useful, 6 = activity not known)

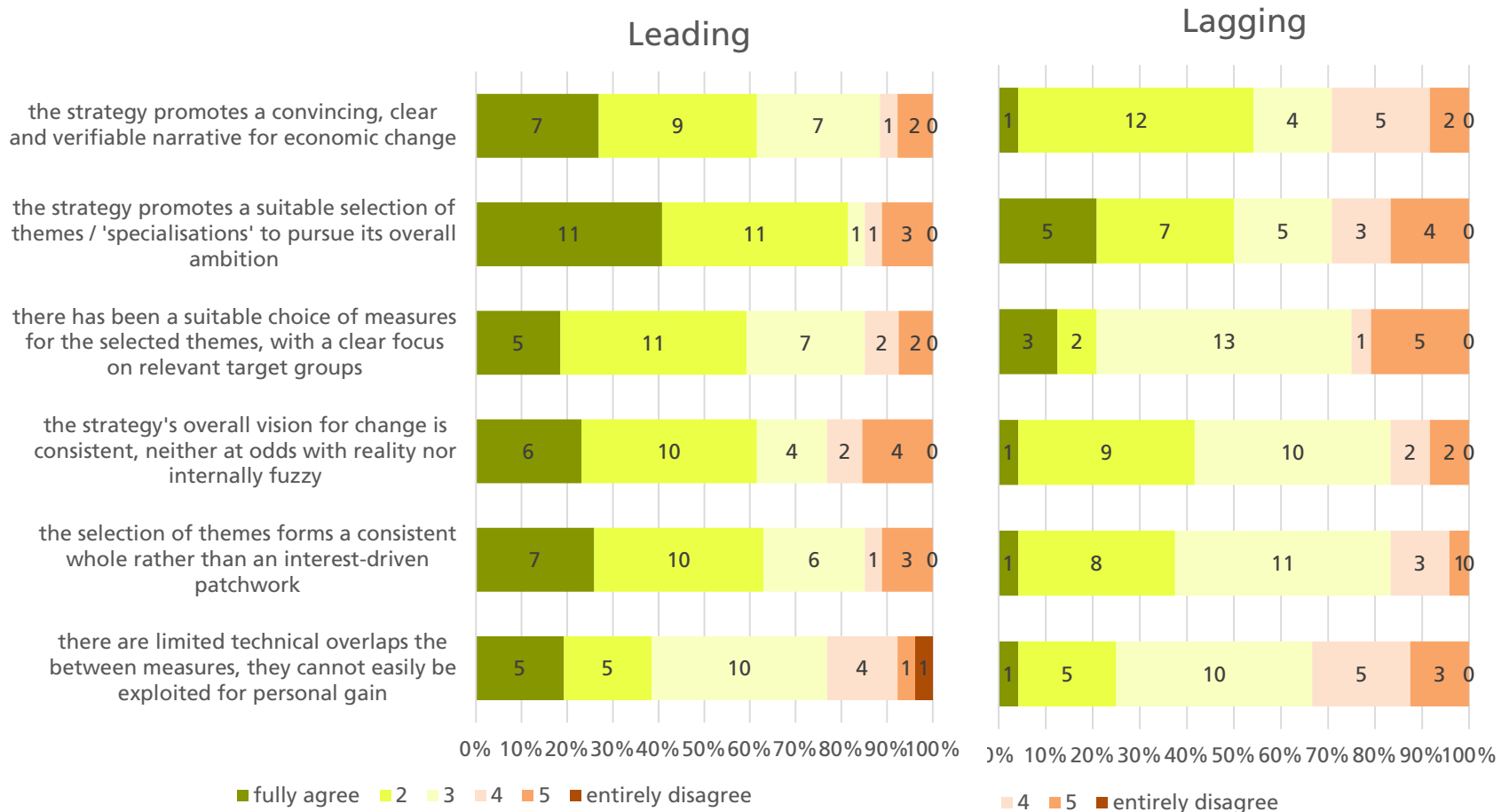


n = 115 - 116

DIFFERENTIATED FINDINGS by Member State and/or Level of Development

Quality of Strategy by Level of Development

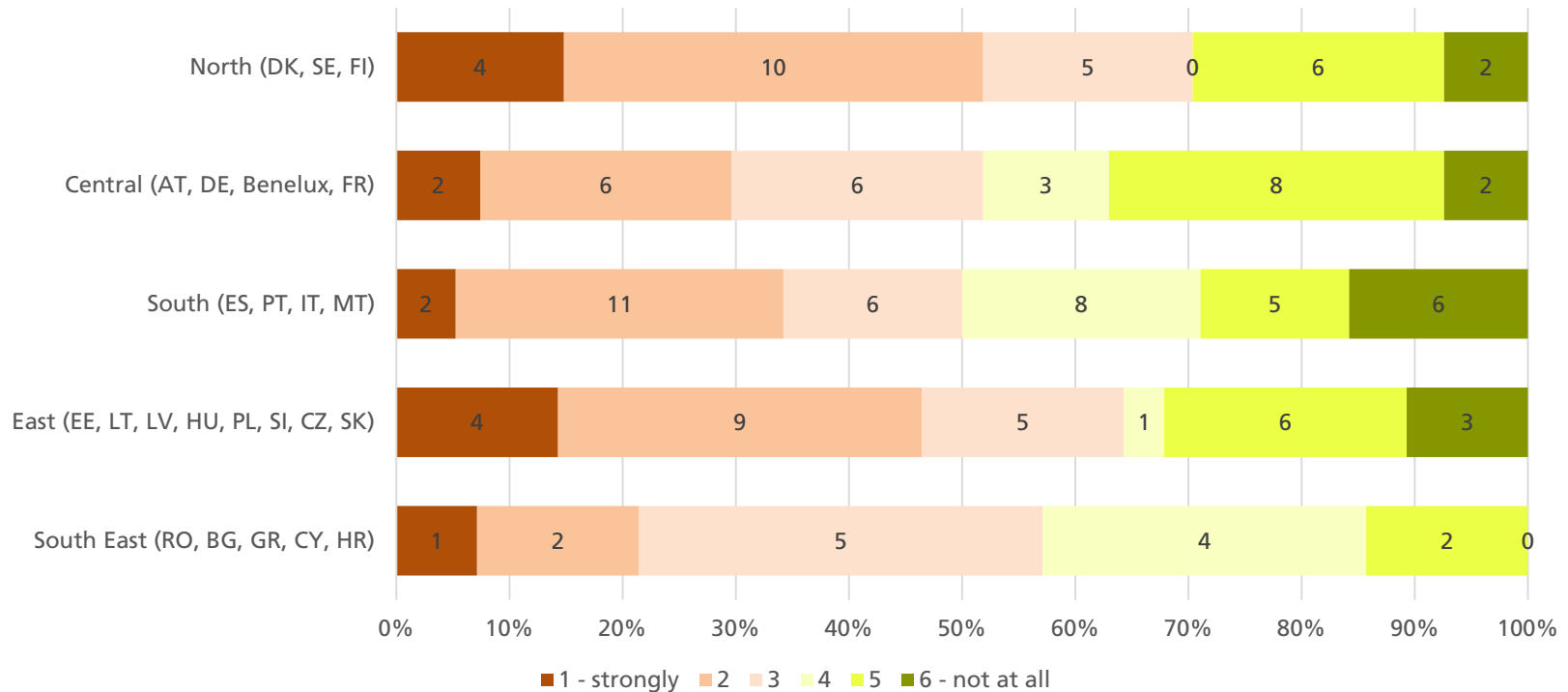
(on a scale from 1-6 with 1 = fully agree, 6 = entirely disagree)



To what extent is your current innovation strategy in need of updating?

(on a scale from 1-6 with 1 = strongly, 6 = not at all)

because it has limitations by design

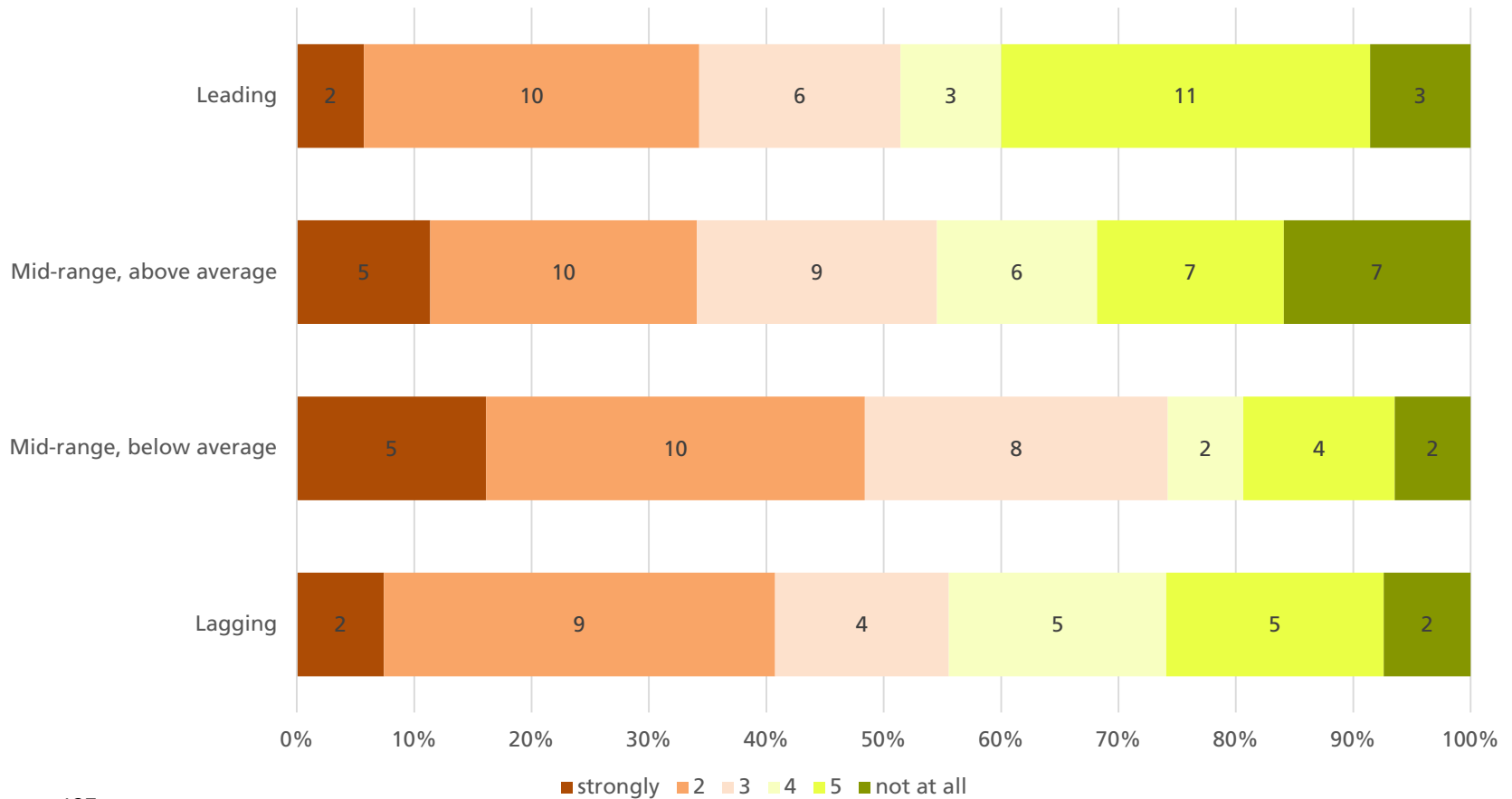


n = 136

To what extent is your current innovation strategy in need of updating?

(on a scale from 1-6 with 1 = strongly, 6 = not at all)

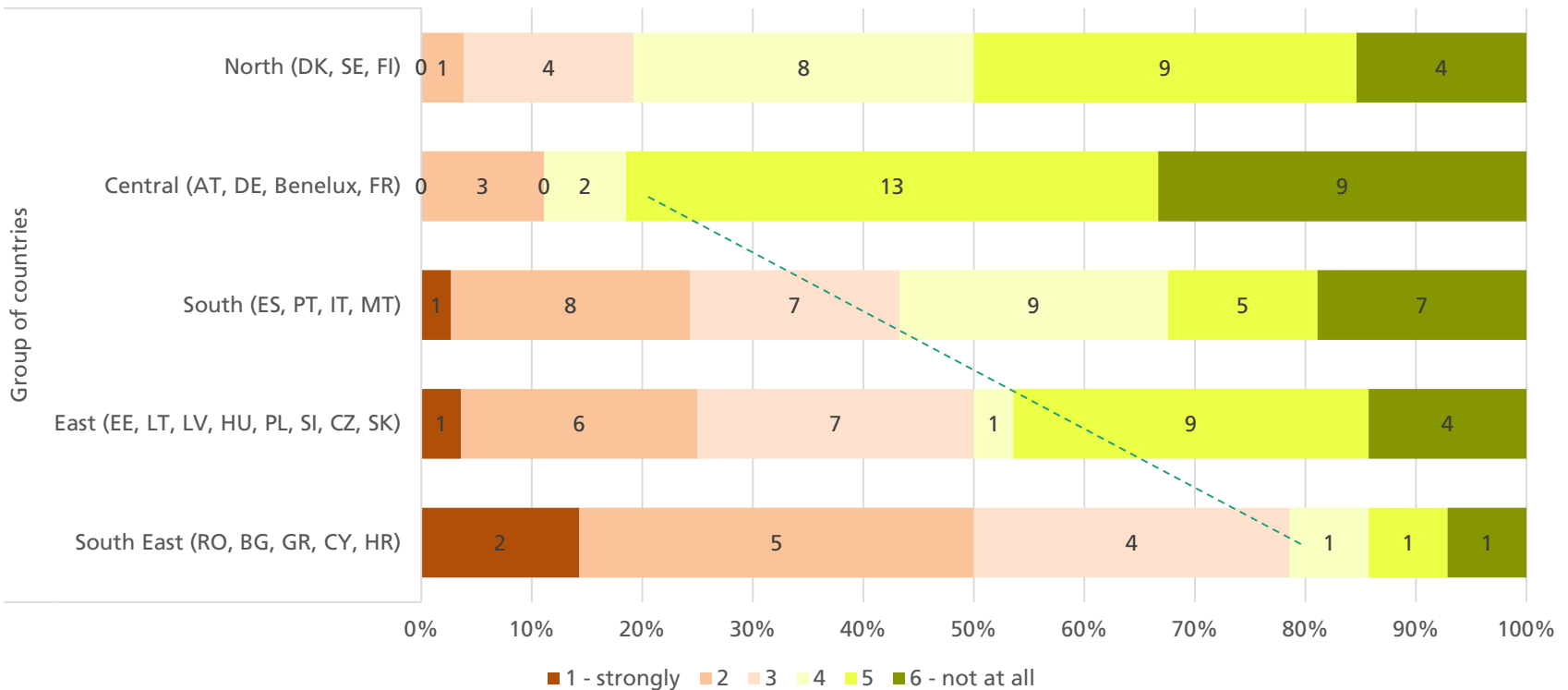
because it has limitations by design



To what extent is your current innovation strategy in need of updating?

(on a scale from 1-6 with 1 = strongly, 6 = not at all)

because it has failed to deliver results

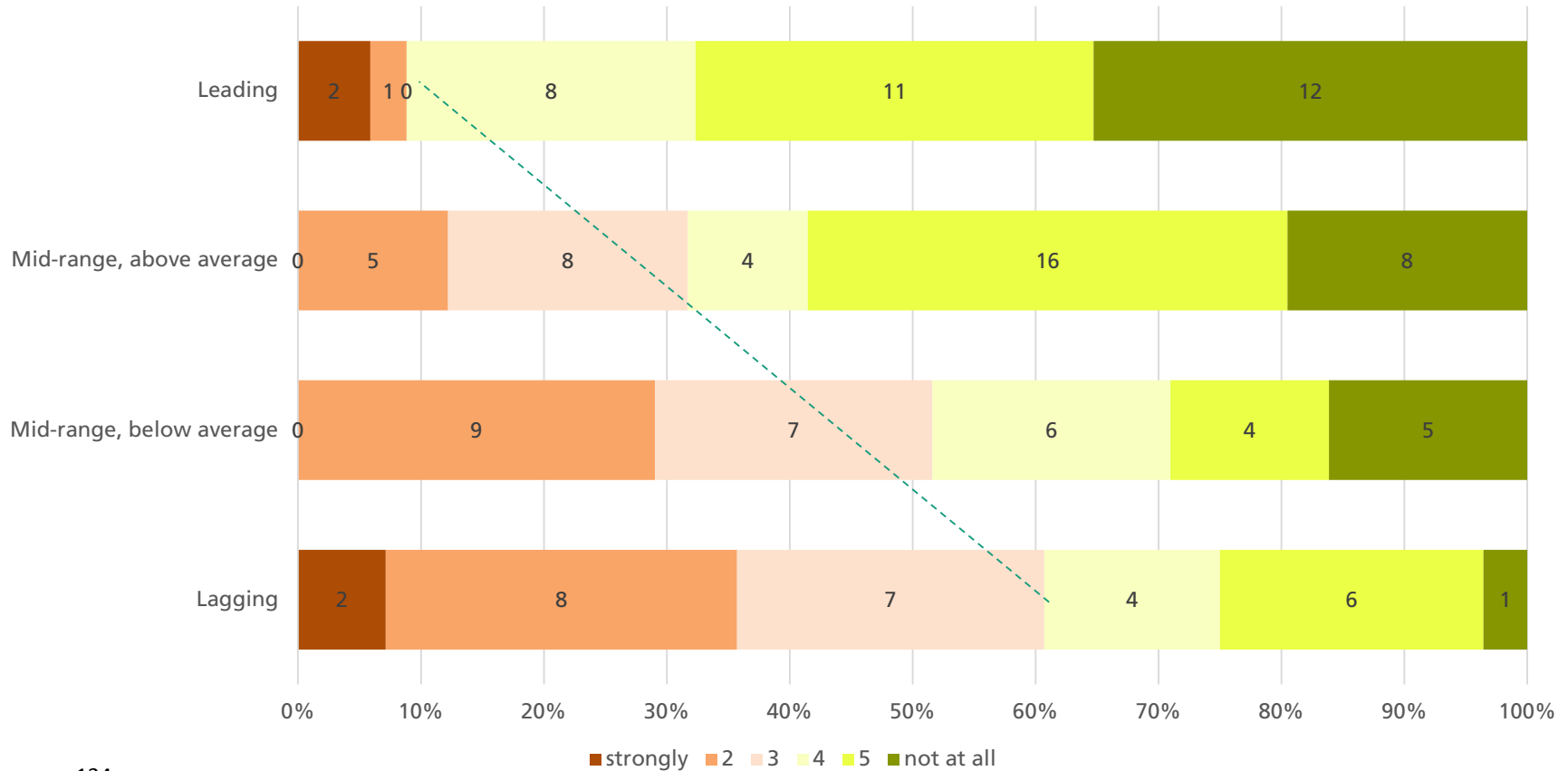


n = 133

To what extent is your current innovation strategy in need of updating?

(on a scale from 1-6 with 1 = strongly, 6 = not at all)

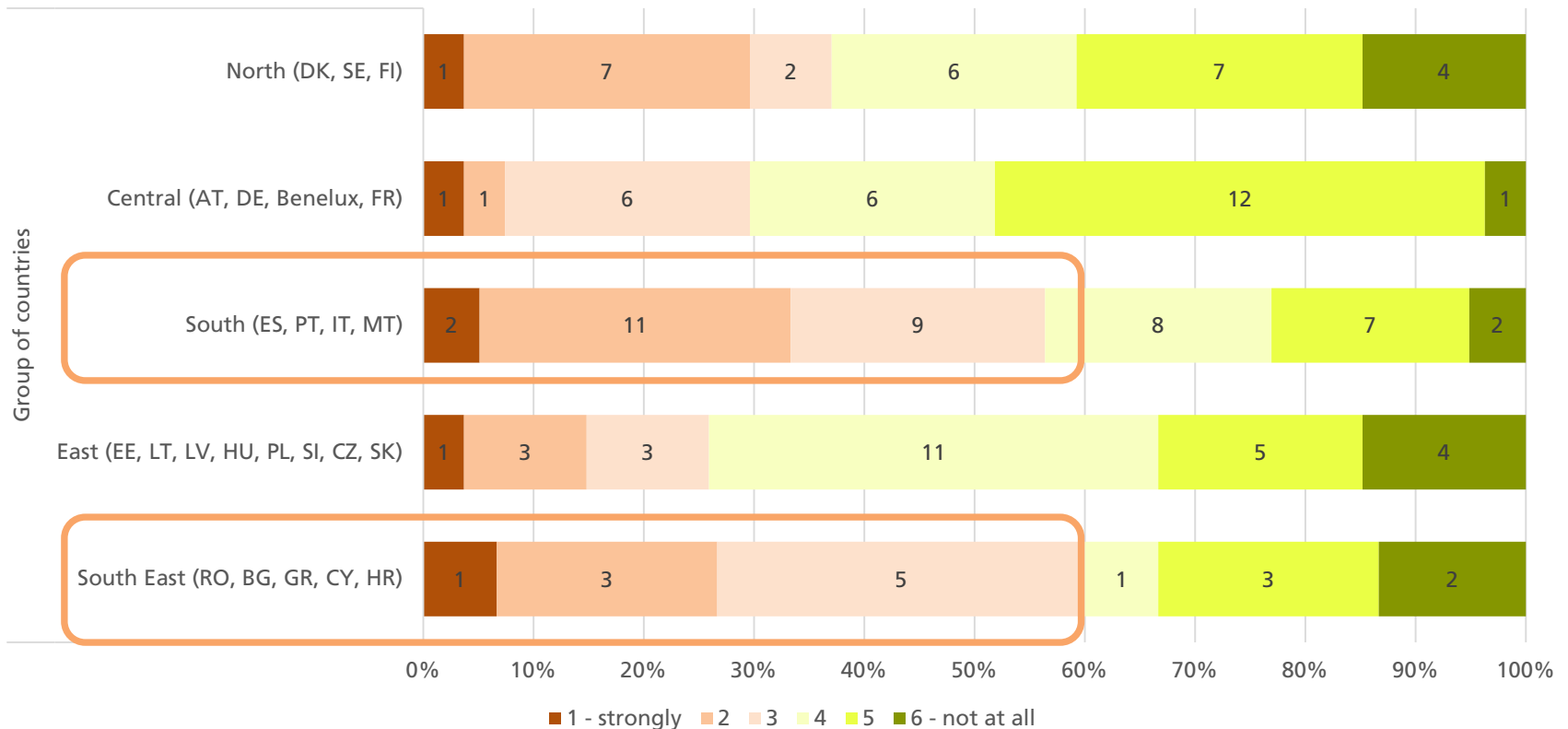
because it has failed to deliver results



To what extent is your current innovation strategy in need of updating?

(on a scale from 1-6 with 1 = strongly, 6 = not at all)

because socioeconomic framework conditions have changed

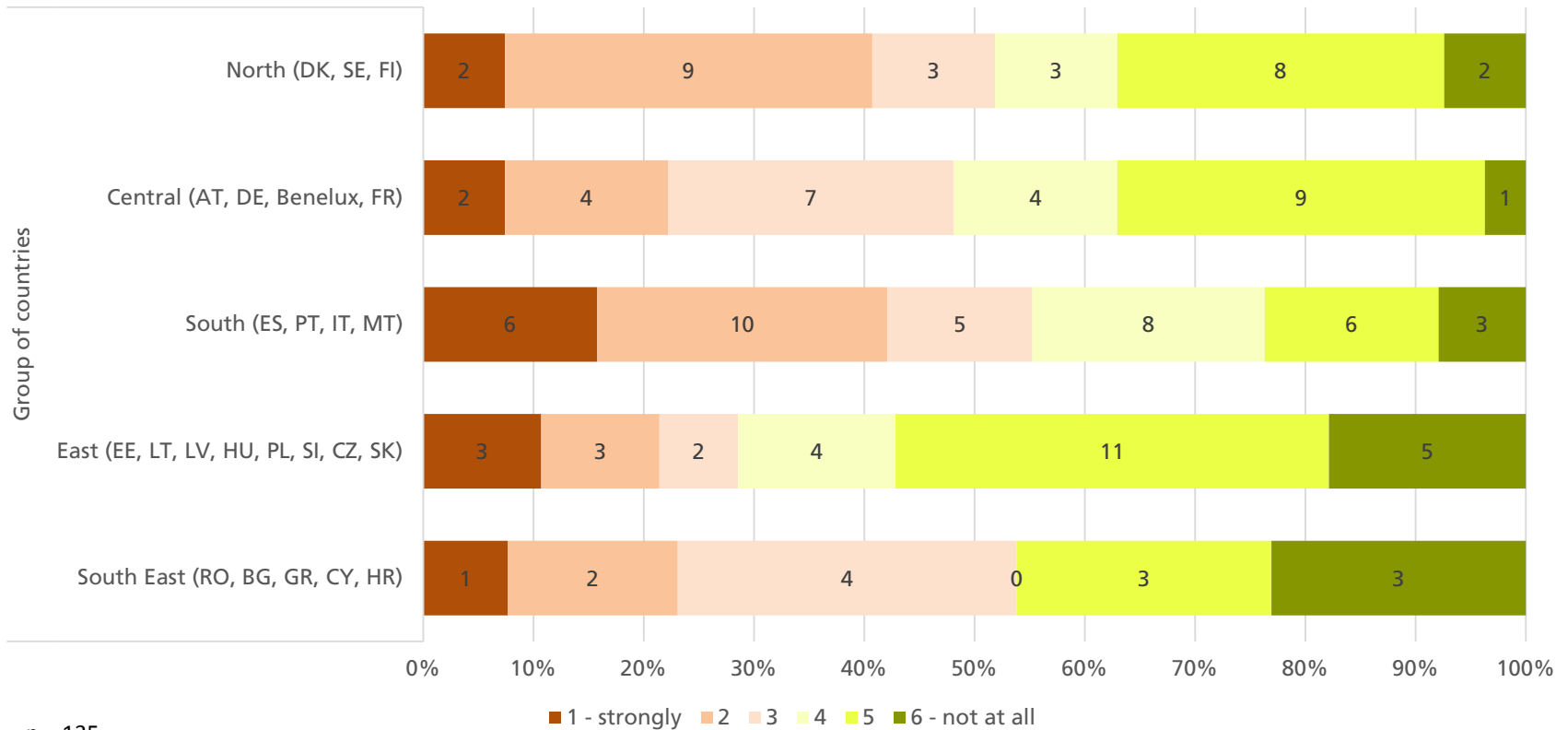


n = 137

To what extent is your current innovation strategy in need of updating?

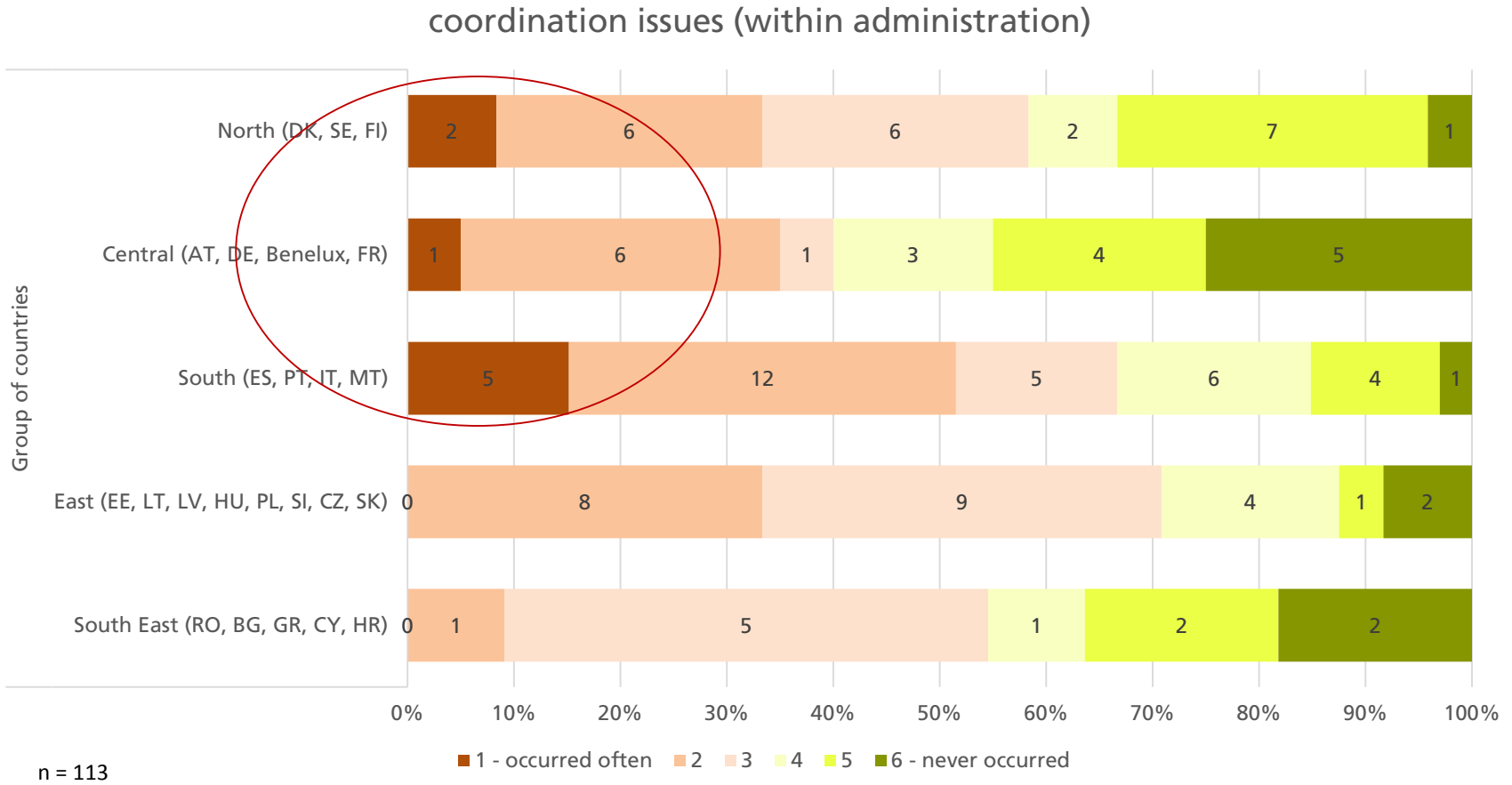
(on a scale from 1-6 with 1 = strongly, 6 = not at all)

because political framework conditions have changed



Which obstacles, if any, have arisen during the development of the past strategy?

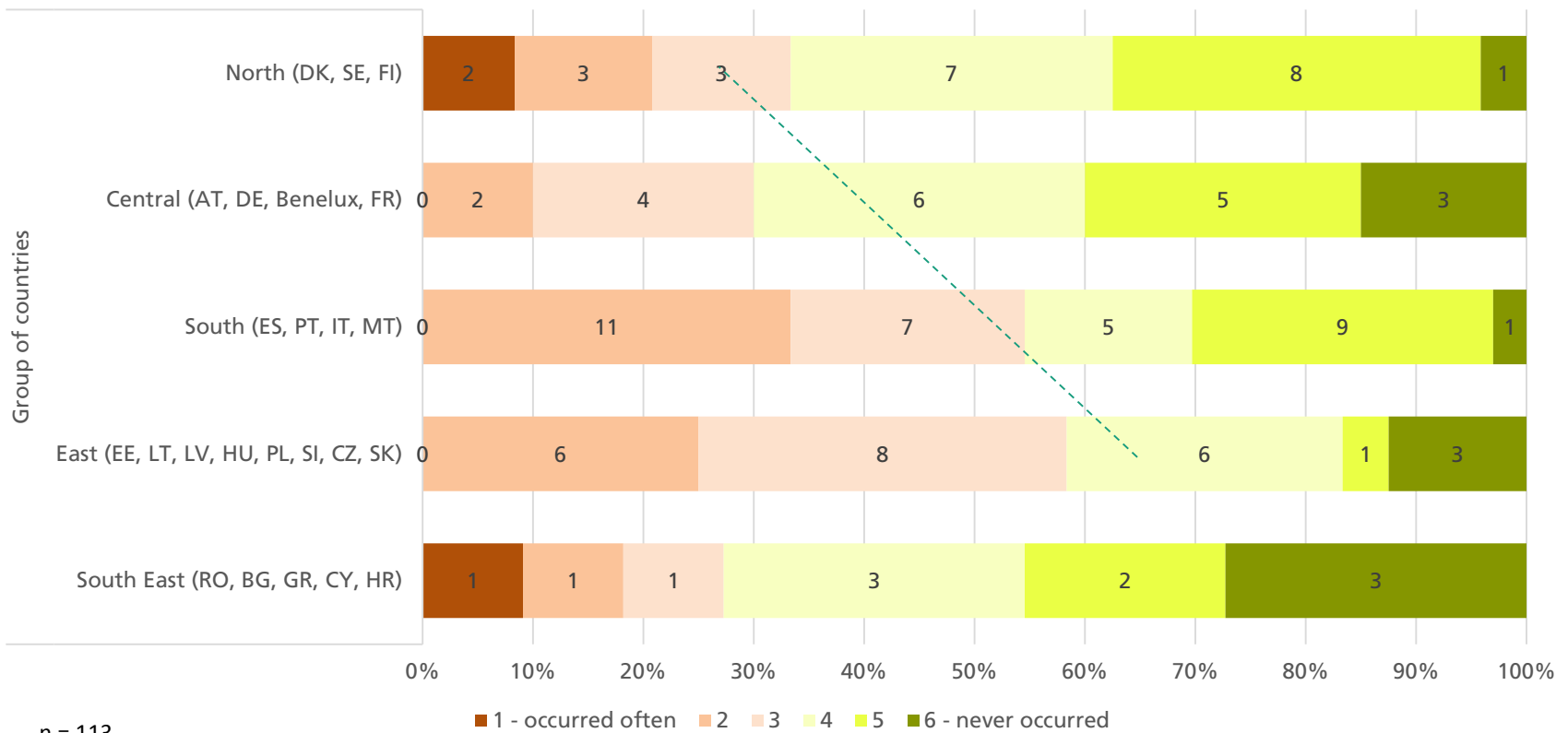
(on a scale from 1-6 with 1 = occurred often, 6 = never occurred)



Which obstacles, if any, have arisen during the development of the past strategy?

(on a scale from 1-6 with 1 = occurred often, 6 = never occurred)

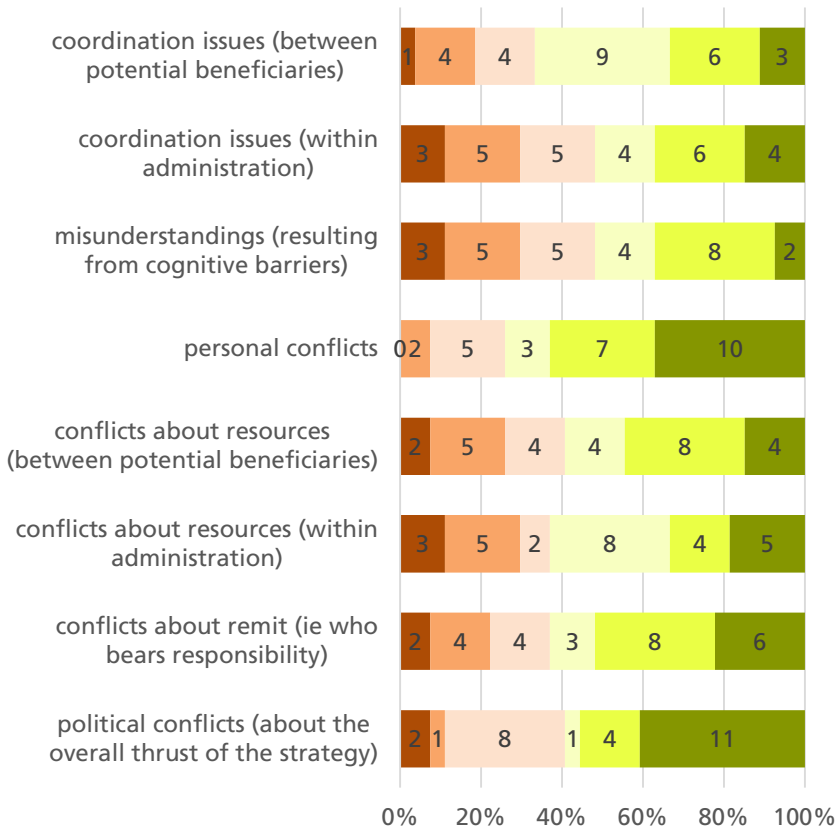
coordination issues (between potential beneficiaries)



Which conflicts, if any, have arisen during the development of the past strategy?

(on a scale from 1-6 with 1 = occurred often, 6 = never occurred)

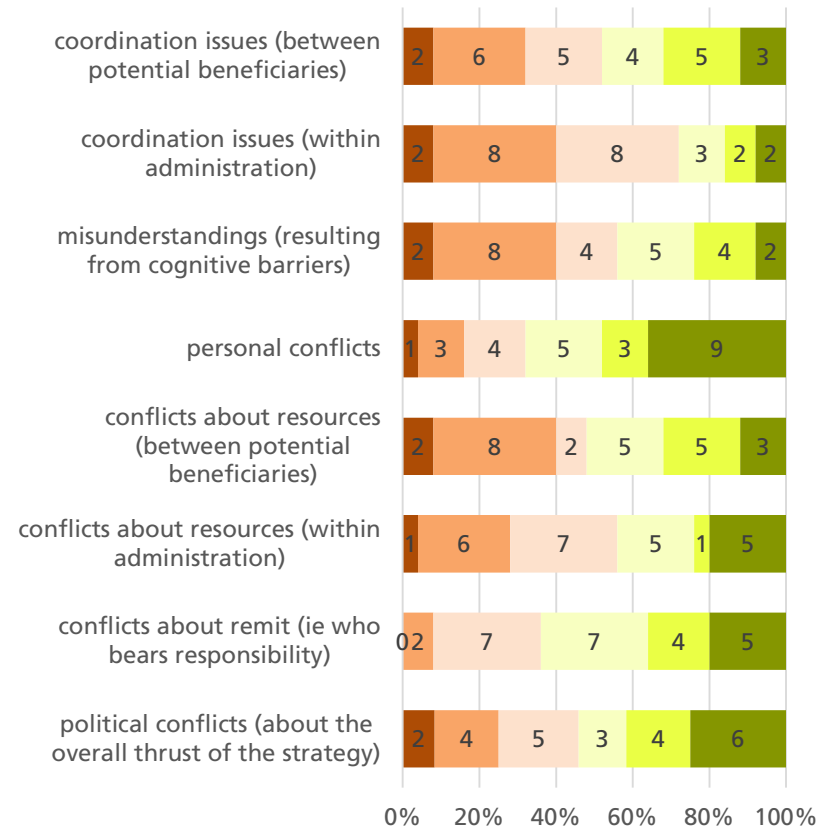
Leading



n = 116

■ occurred often ■ 2 ■ 3 ■ 4 ■ 5 ■ never occurred

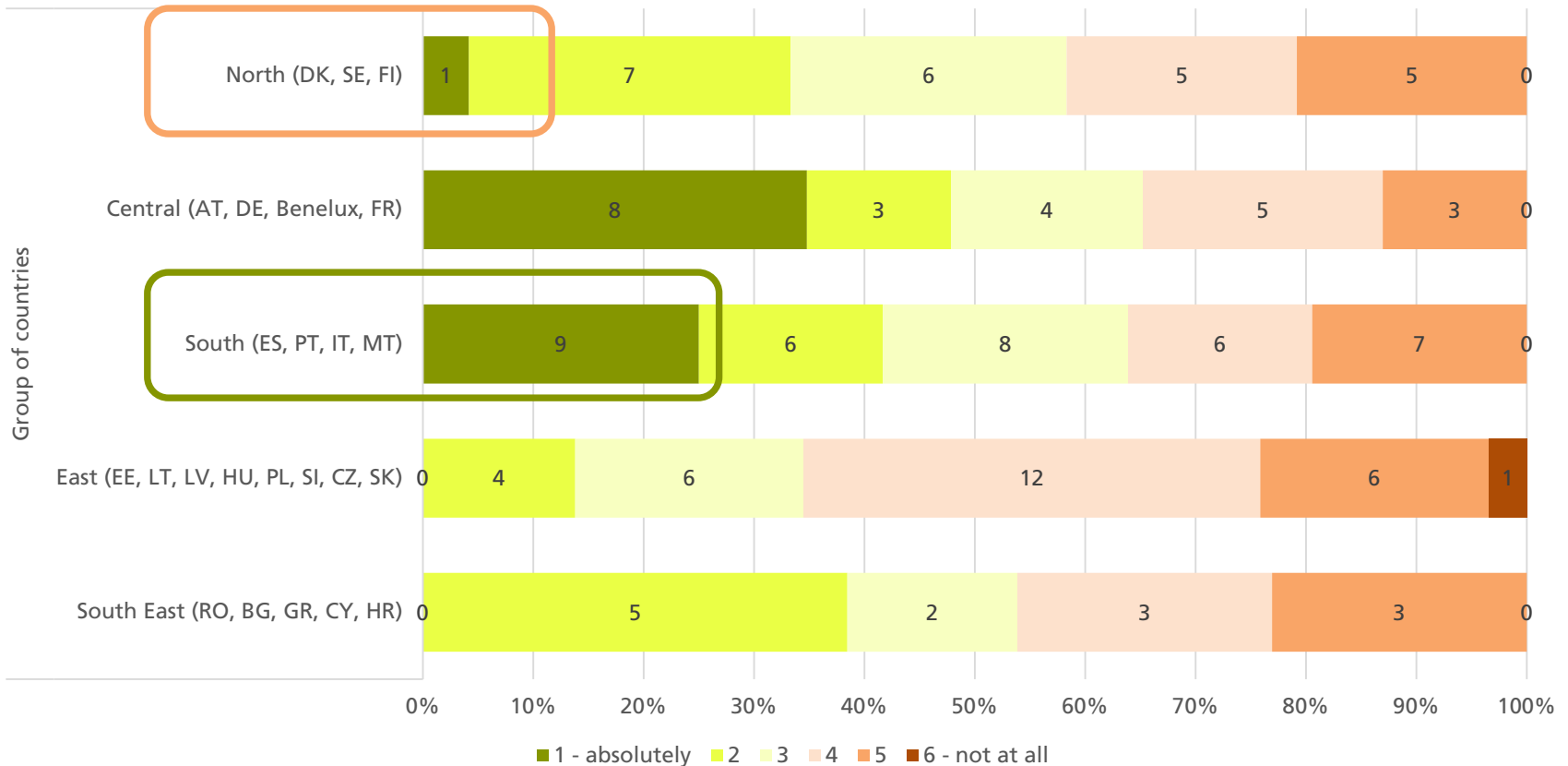
Lagging



■ occurred often ■ 2 ■ 3 ■ 4 ■ 5 ■ never occurred

Do your region's/nation's implementation agencies have sufficient capabilities and experience to productively host, moderate and draw conclusions from bottom-up processes?

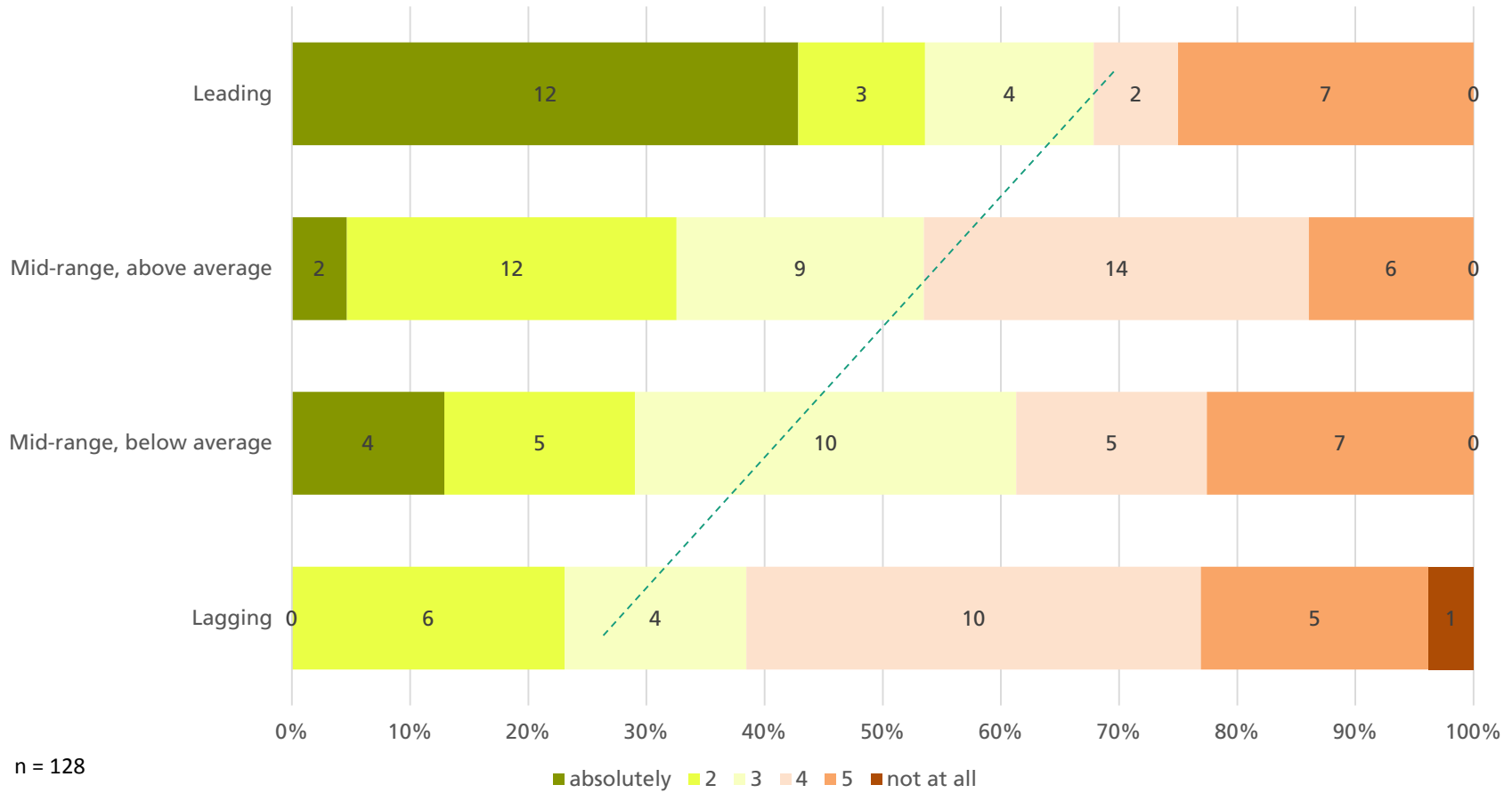
(on a scale from 1-6 with 1 = absolutely, 6 = not at all)



n = 127

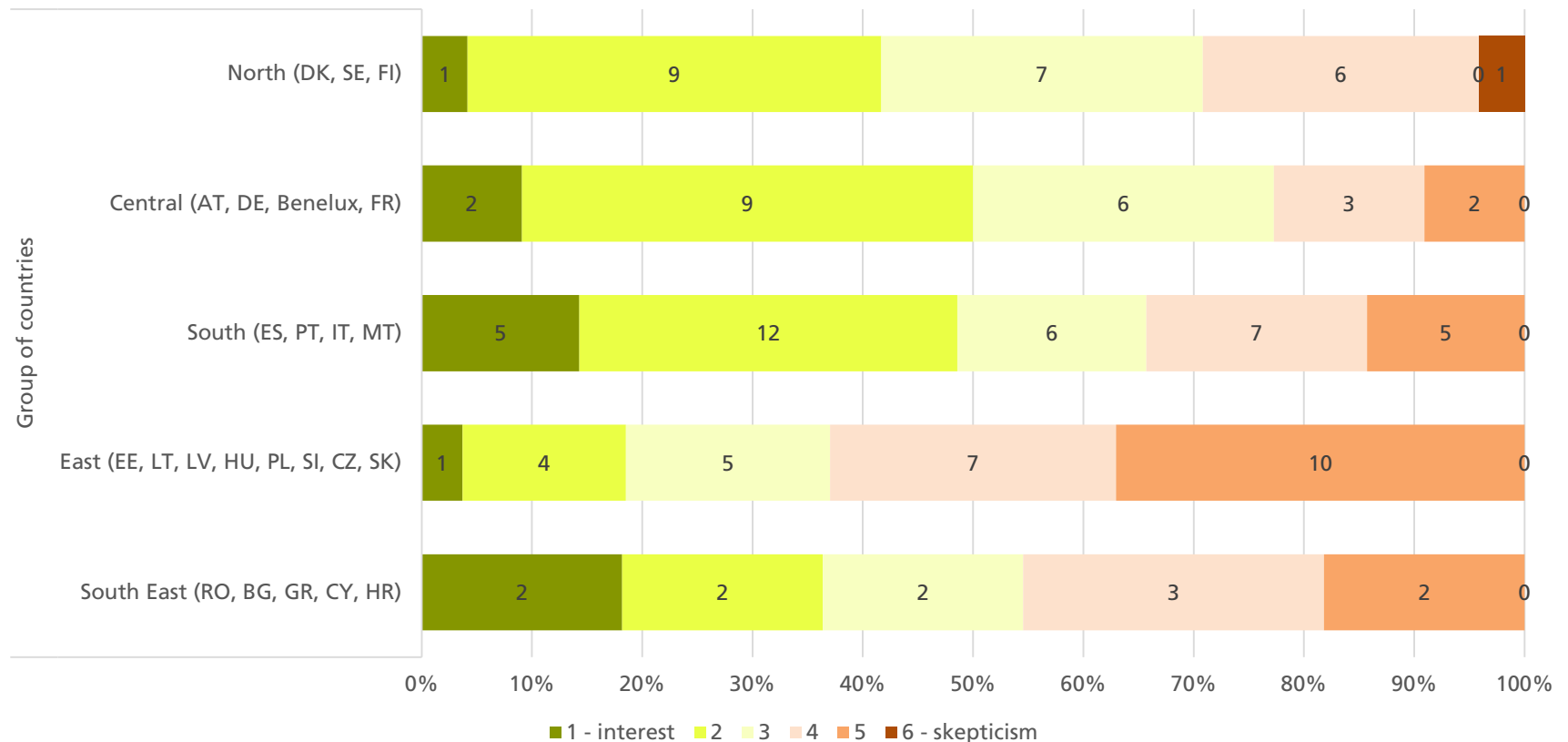
Do your region's/nation's implementation agencies have sufficient capabilities and experience to productively host, moderate and draw conclusions from bottom-up processes?

(on a scale from 1-6 with 1 = absolutely, 6 = not at all)



Are dynamic local businesspeople interested in collaboration with your government or do you perceive skepticism and an attitude of 'no government interference is best support'?

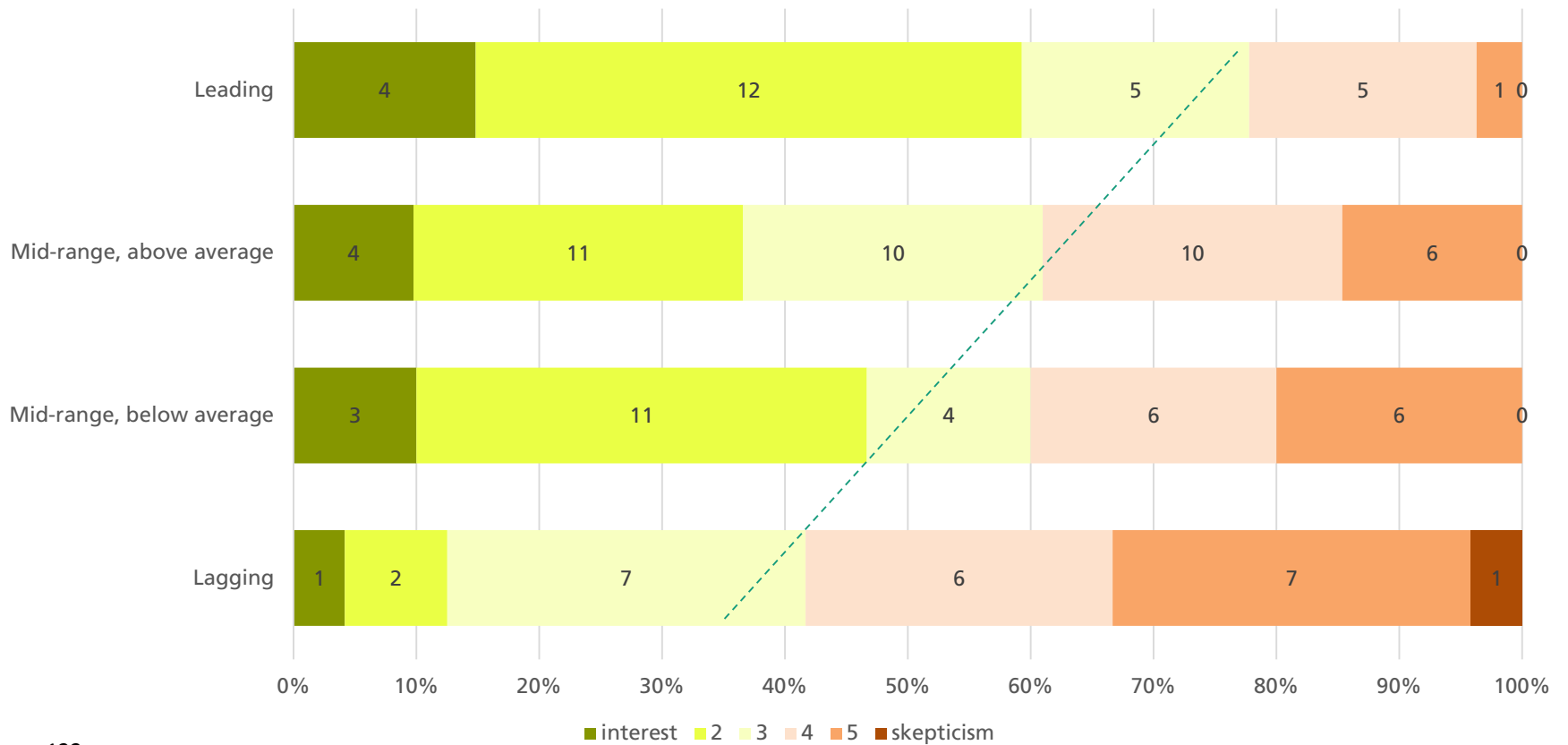
(on a scale from 1-6 with 1 = interest, 6 = skepticism)



n = 121

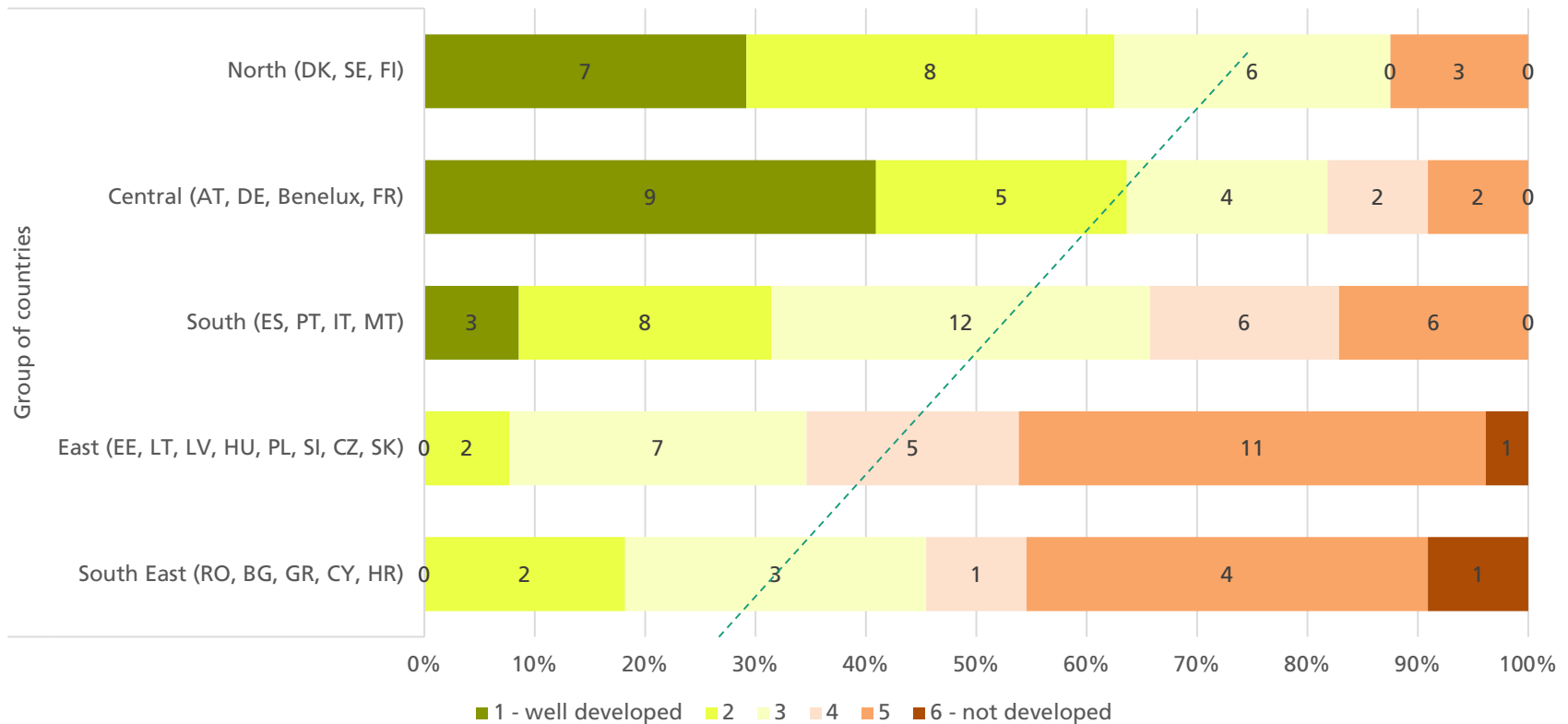
Are dynamic local businesspeople interested in collaboration with your government or do you perceive skepticism and an attitude of 'no government interference is best support'?

(on a scale from 1-6 with 1 = interest, 6 = skepticism)



How developed is the tradition of collaboration between higher education, public research and local industry (Triple-Helix) in your region/nation?

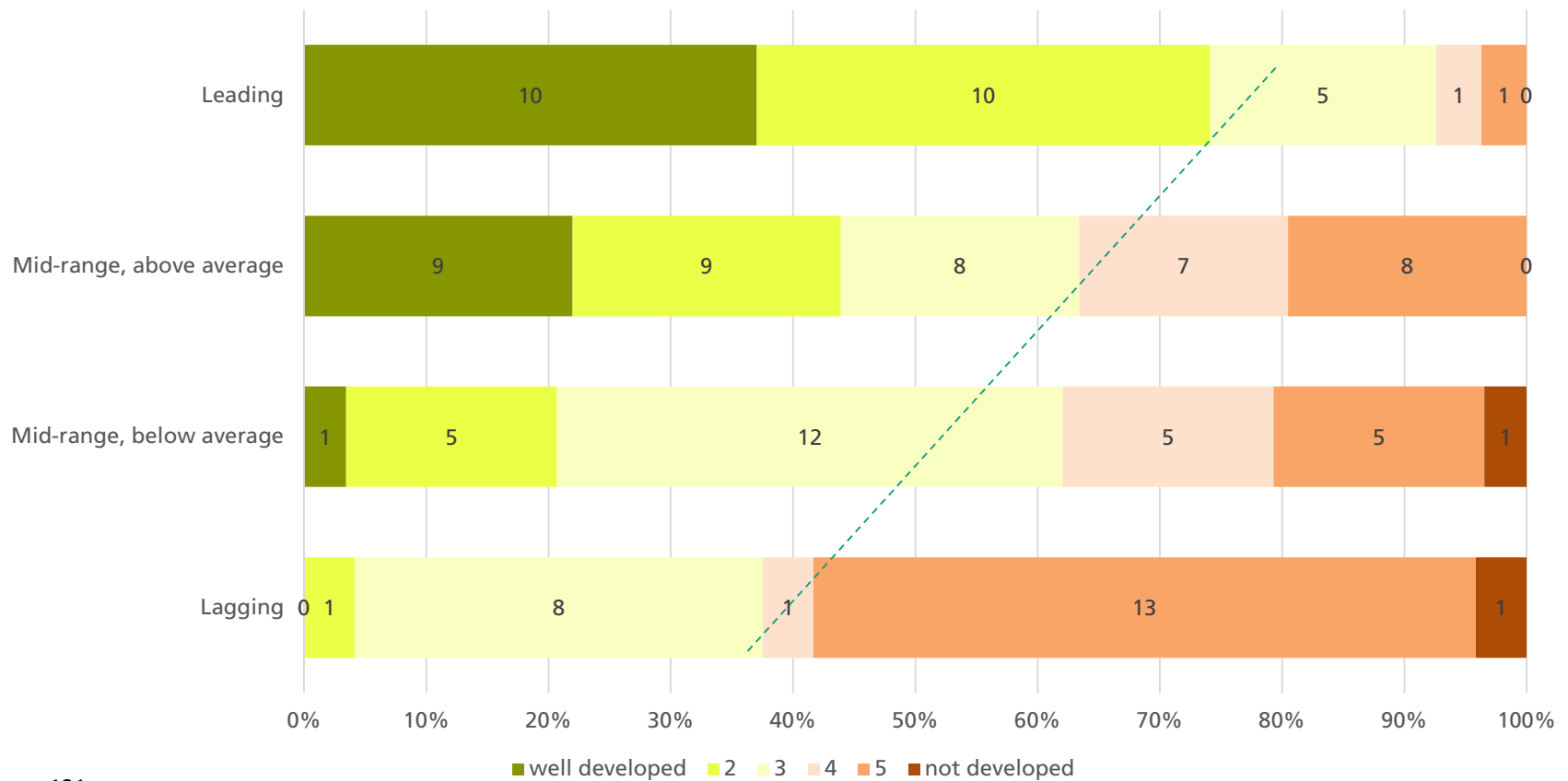
(on a scale from 1-6 with 1 = well developed, 6 = not developed)



n = 120

How developed is the tradition of collaboration between higher education, public research and local industry (Triple-Helix) in your region/nation?

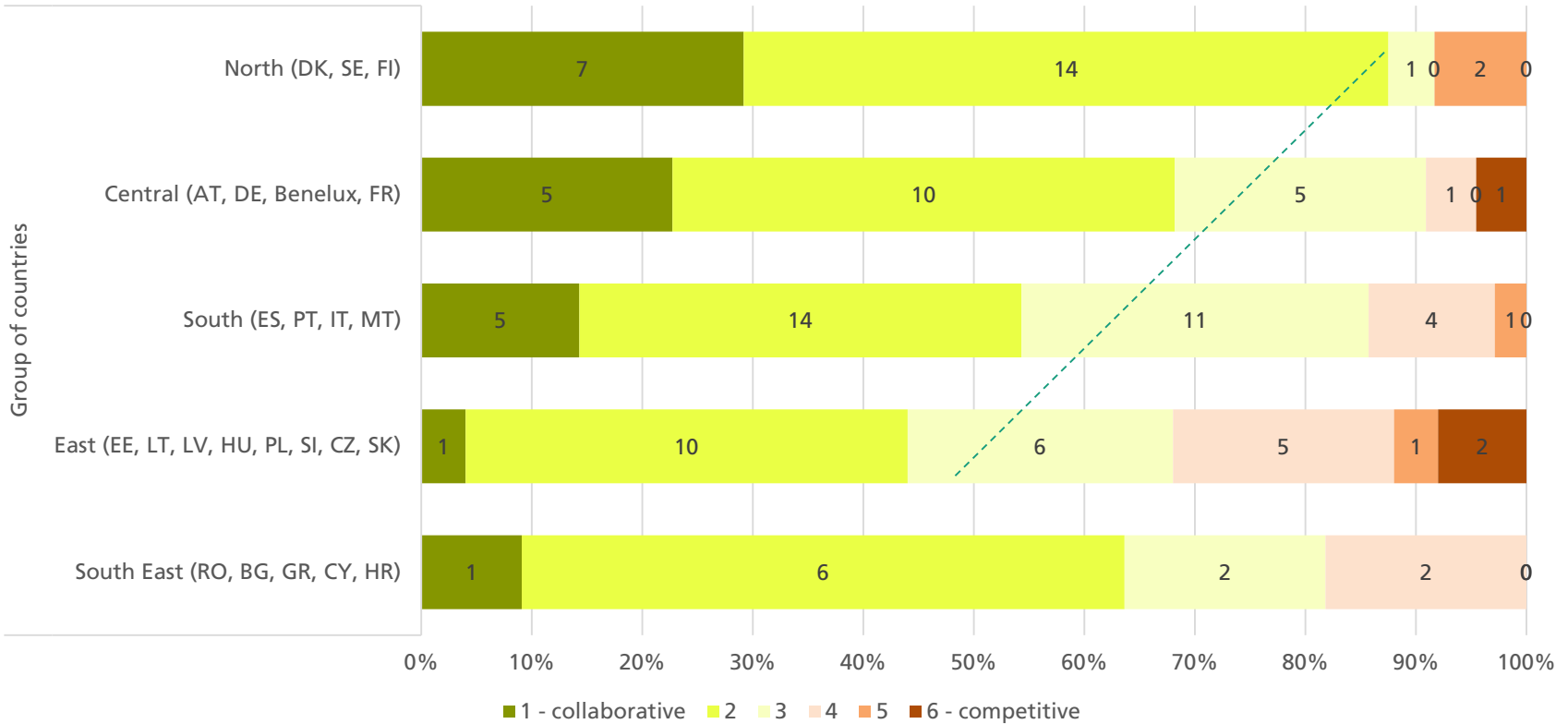
(on a scale from 1-6 with 1 = well developed, 6 = not developed)



n = 121

At European and national level: would you see the strategic relations with other regions as collaborative or as competitive (with a view to industrial and innovation policy)?

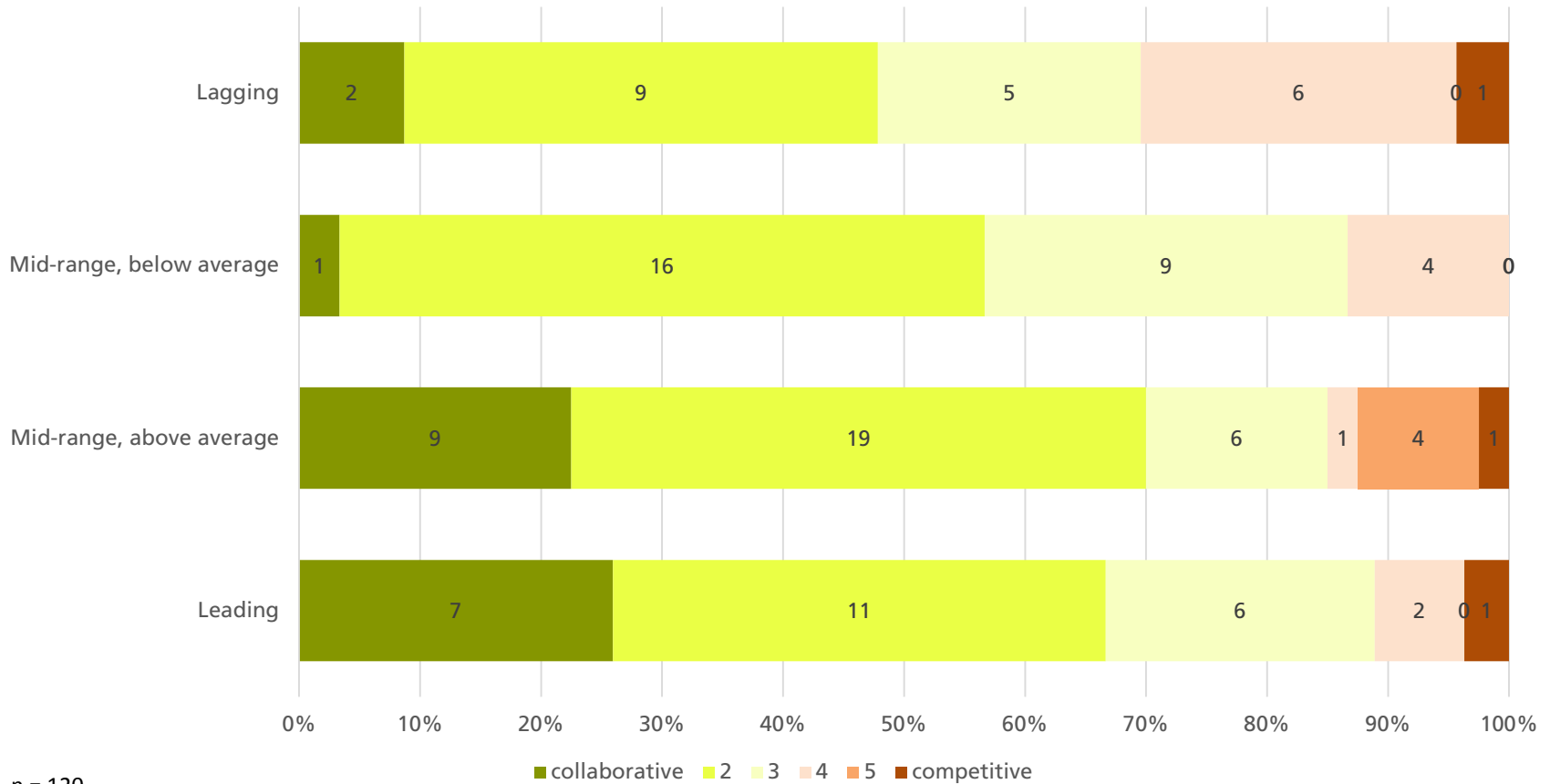
(on a scale from 1-6 with 1 = collaborative, 6 = competitive)



n = 119

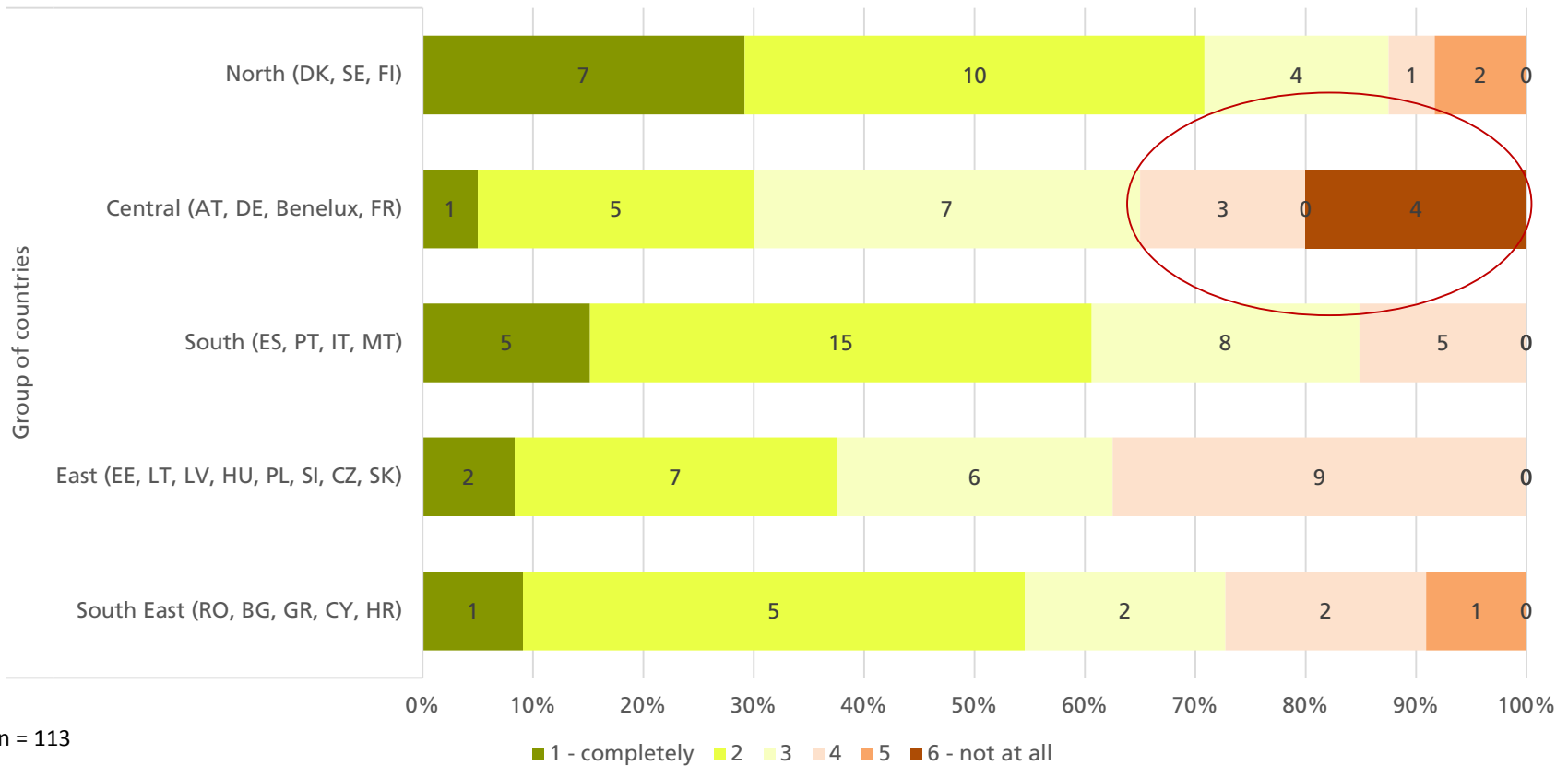
At European and national level: would you see the strategic relations with other regions as collaborative or as competitive (with a view to industrial and innovation policy)?

(on a scale from 1-6 with 1 = collaborative, 6 = competitive)



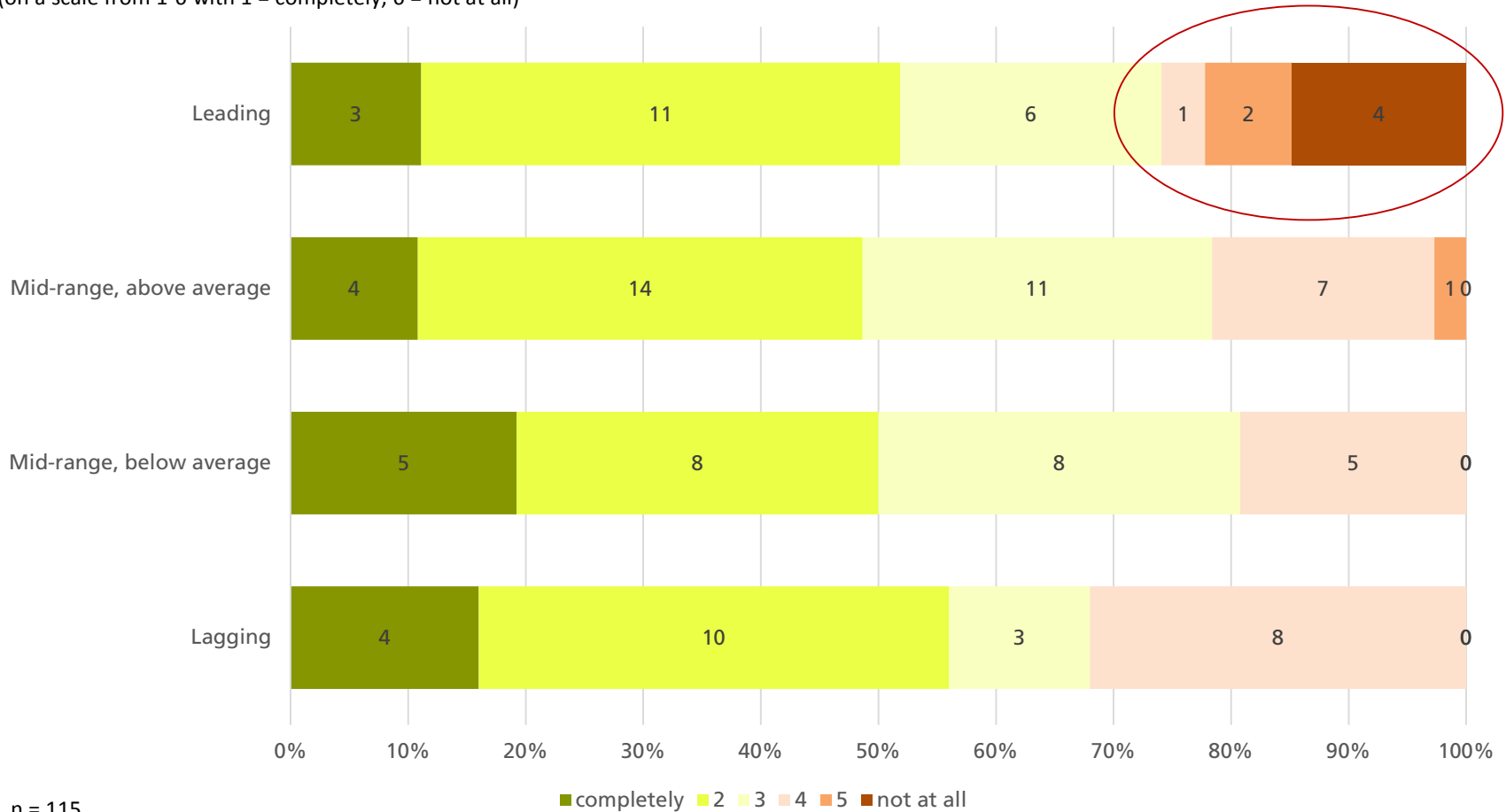
To what extent do you believe that a better or more targeted set up of future processes and supporting governance institutions can fix these issues in your region/nation:

(on a scale from 1-6 with 1 = completely, 6 = not at all)

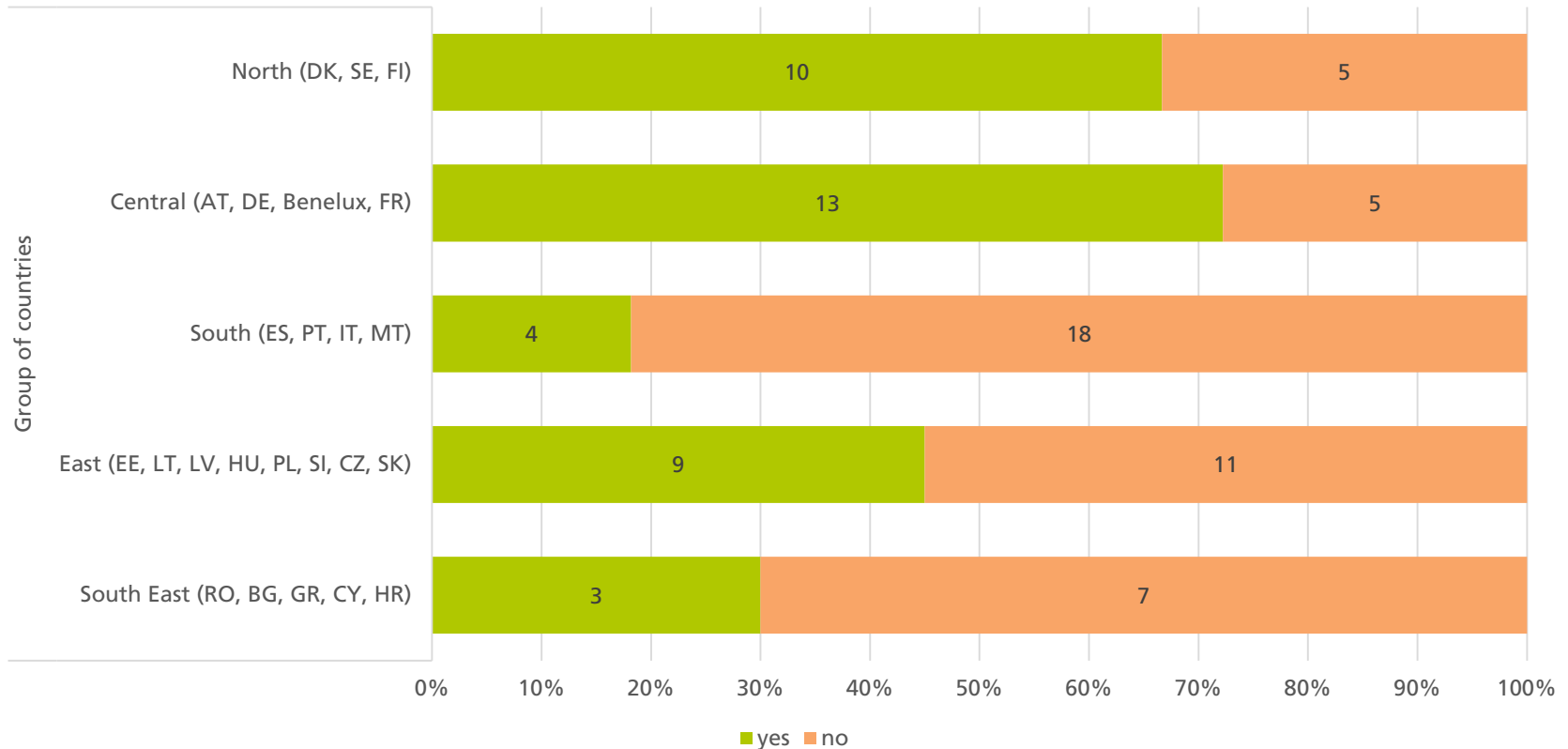


To what extent do you believe that a better or more targeted set up of future processes and supporting governance institutions can fix these issues in your region/nation:

(on a scale from 1-6 with 1 = completely, 6 = not at all)

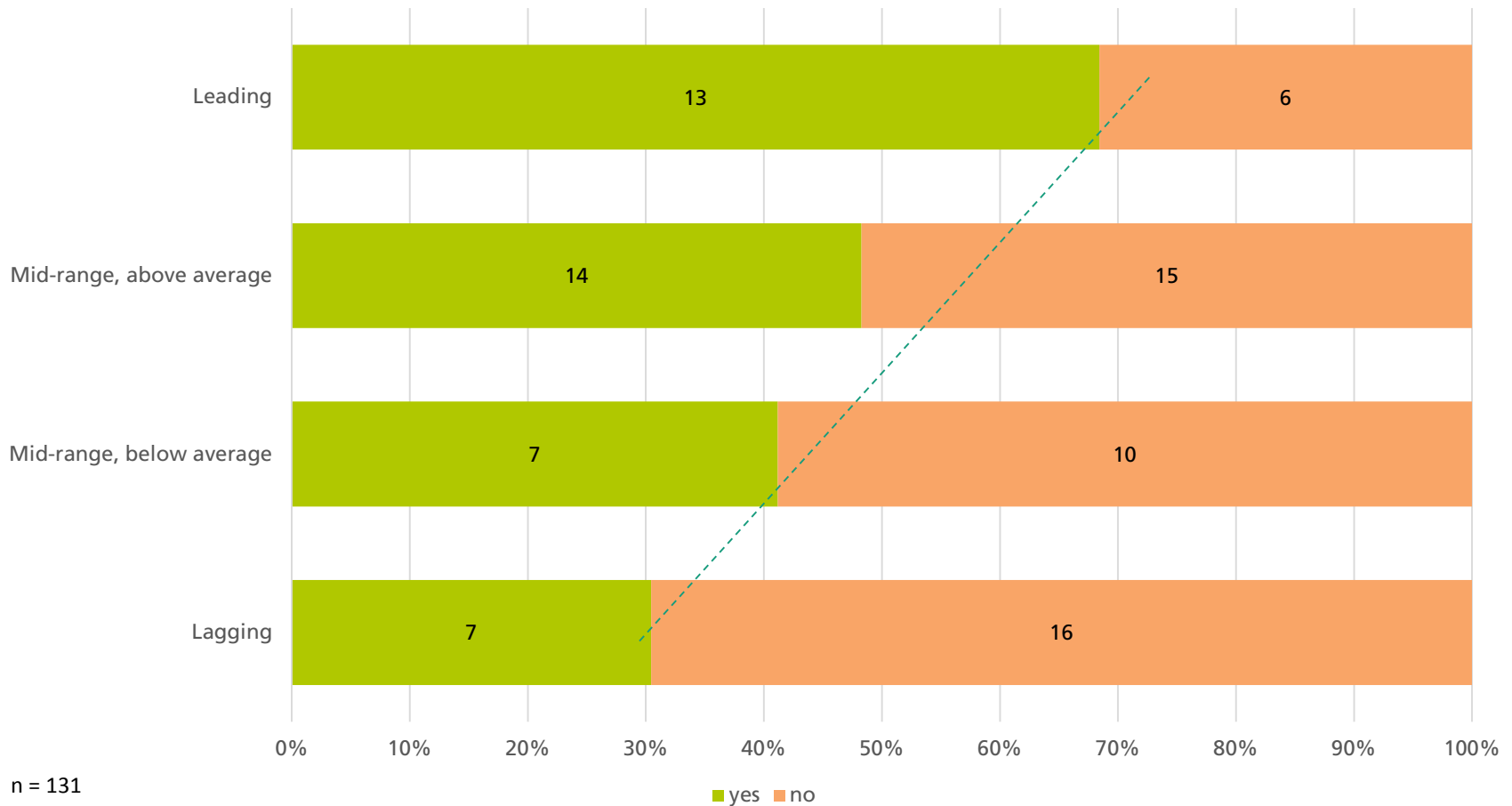


Have first activities to outline a new agenda for regional innovation policy for the 2021-27 period already been undertaken in your region/nation?

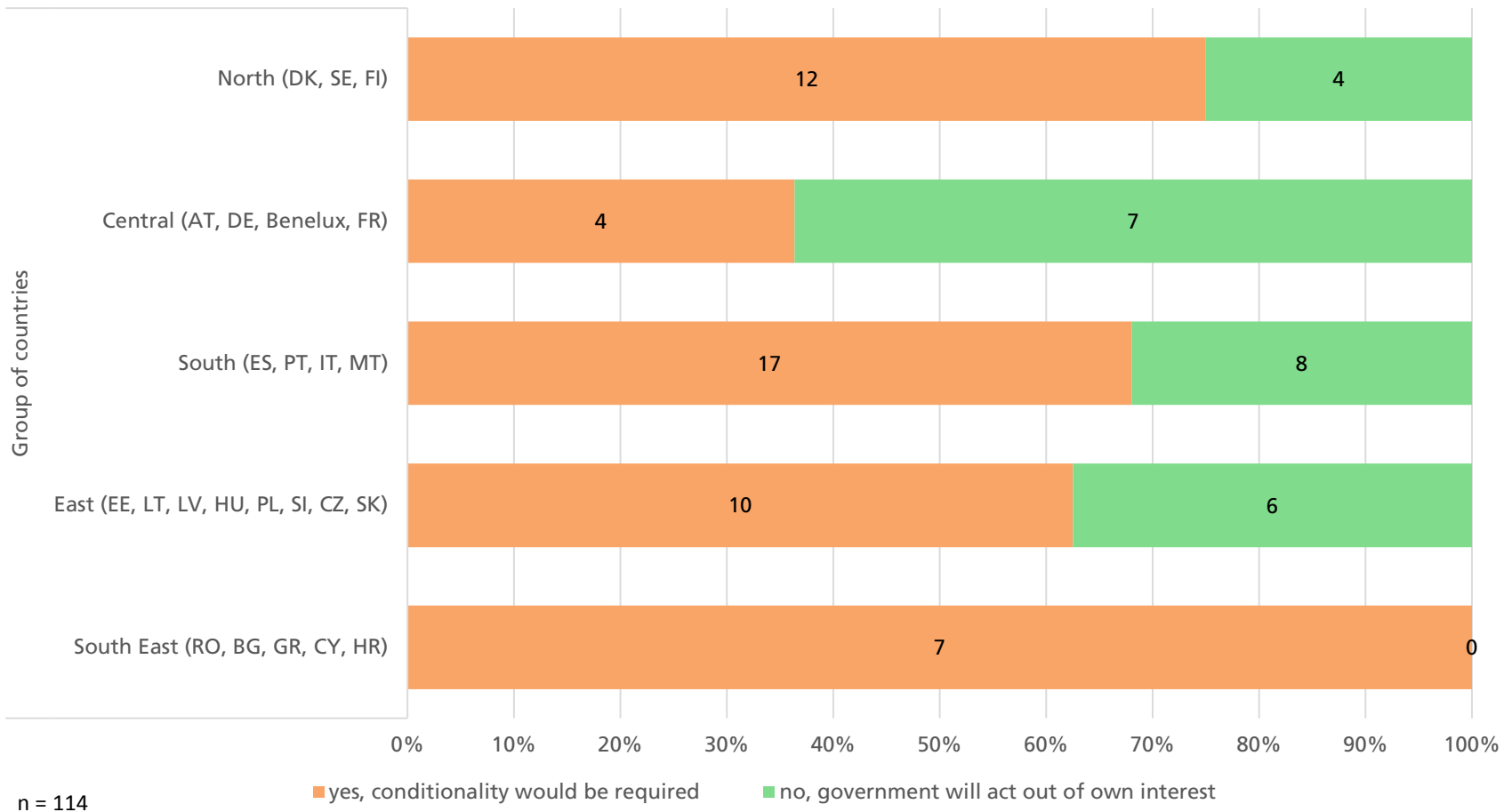


n = 130

Have first activities to outline a new agenda for regional innovation policy for the 2021-27 period already been undertaken in your region/nation?

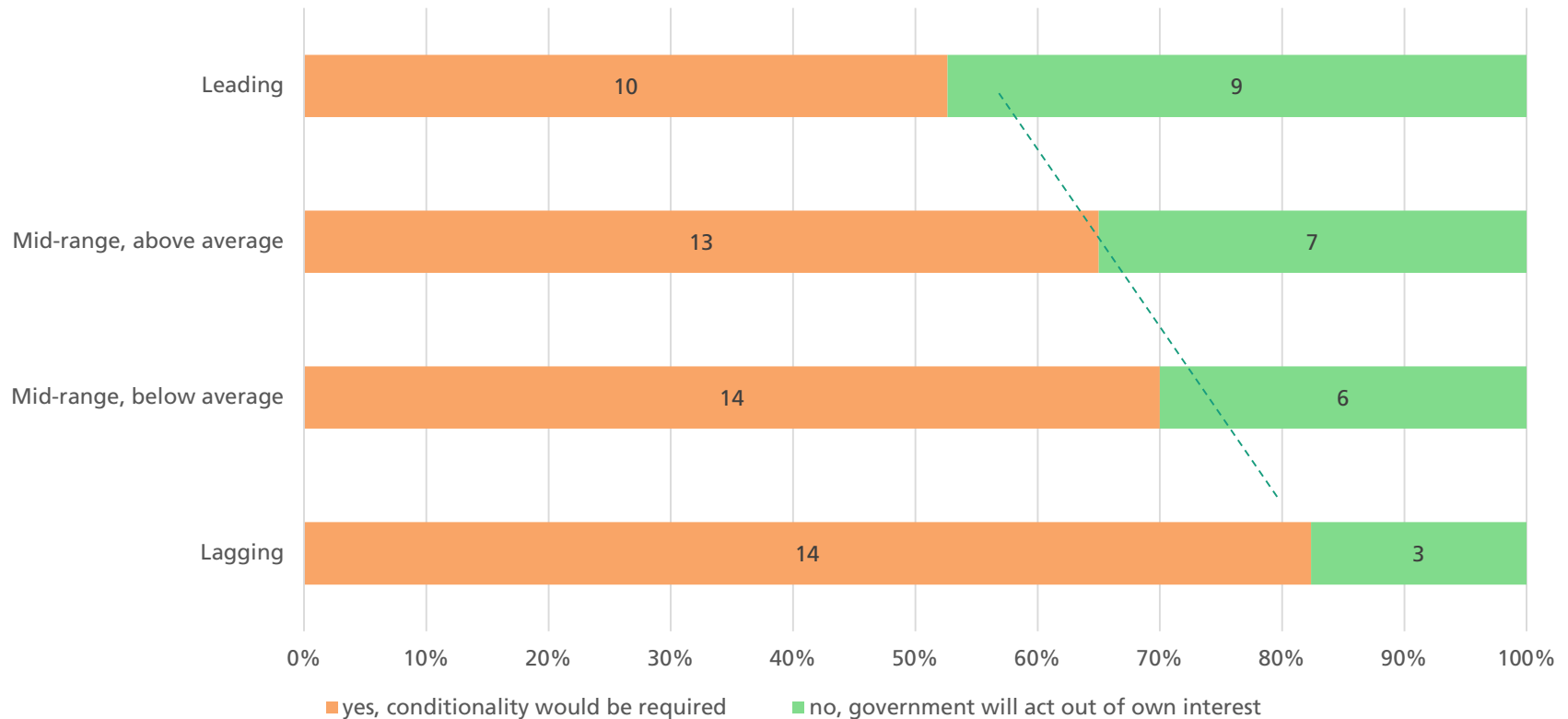


Would it take a renewed external requirement ('conditionality') by the European Commission to get such efforts underway or will your government pursue them out of own motivation?



Would it take a renewed external requirement ('conditionality') by the European Commission to get such efforts underway or will your government pursue them out of own motivation?

(on a scale from 1-6 with 1 = completely, 6 = not at all)

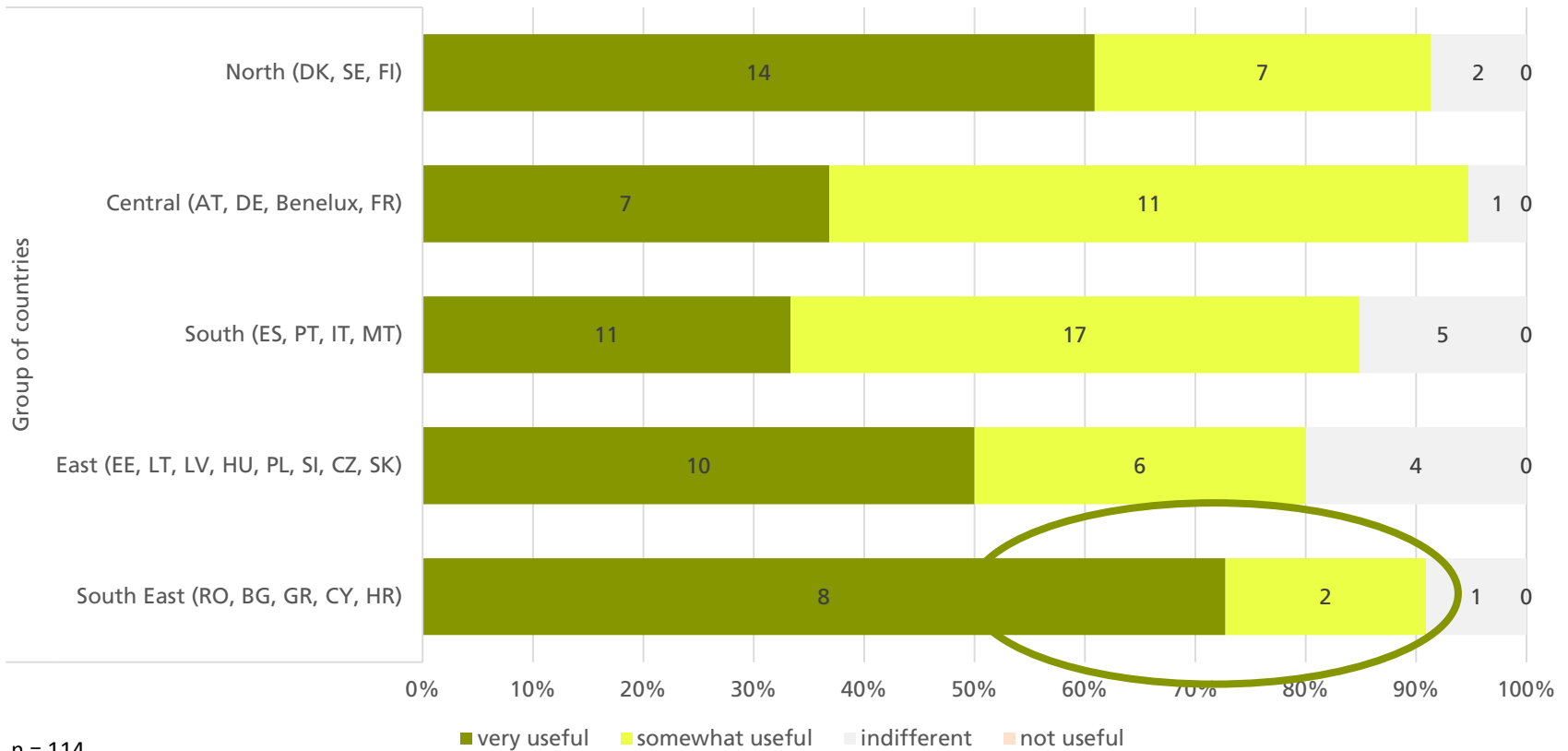


n = 115

Do you consider the following activities of the European Commission as useful to improve the design and implementation of innovation policy in your region/nation?

(on a scale from 1-6 with 1 = very useful, 6 = activity not known)

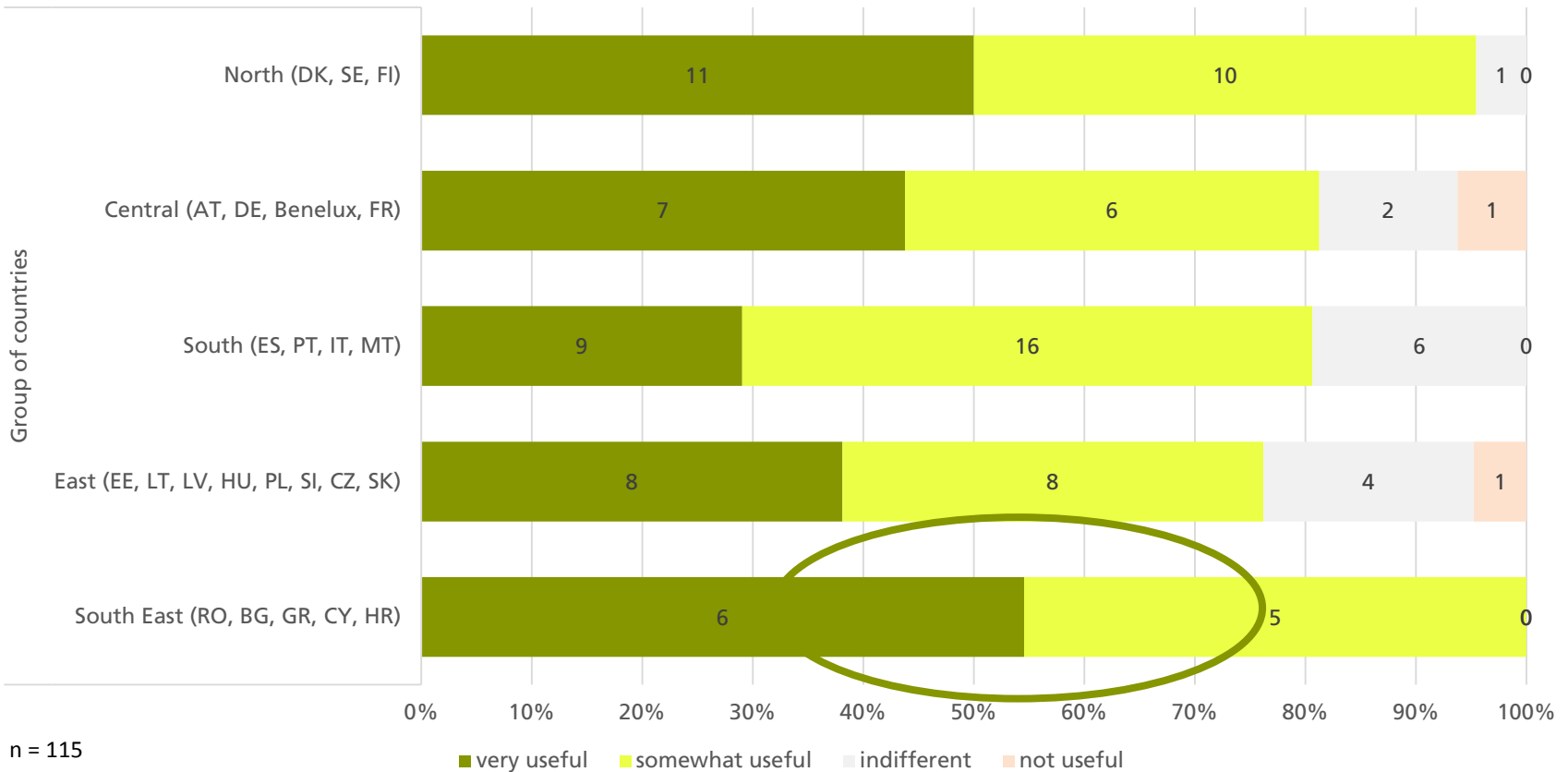
the pilot actions for interregional collaboration



Do you consider the following activities of the European Commission as useful to improve the design and implementation of innovation policy in your region/nation?

(on a scale from 1-6 with 1 = very useful, 6 = activity not known)

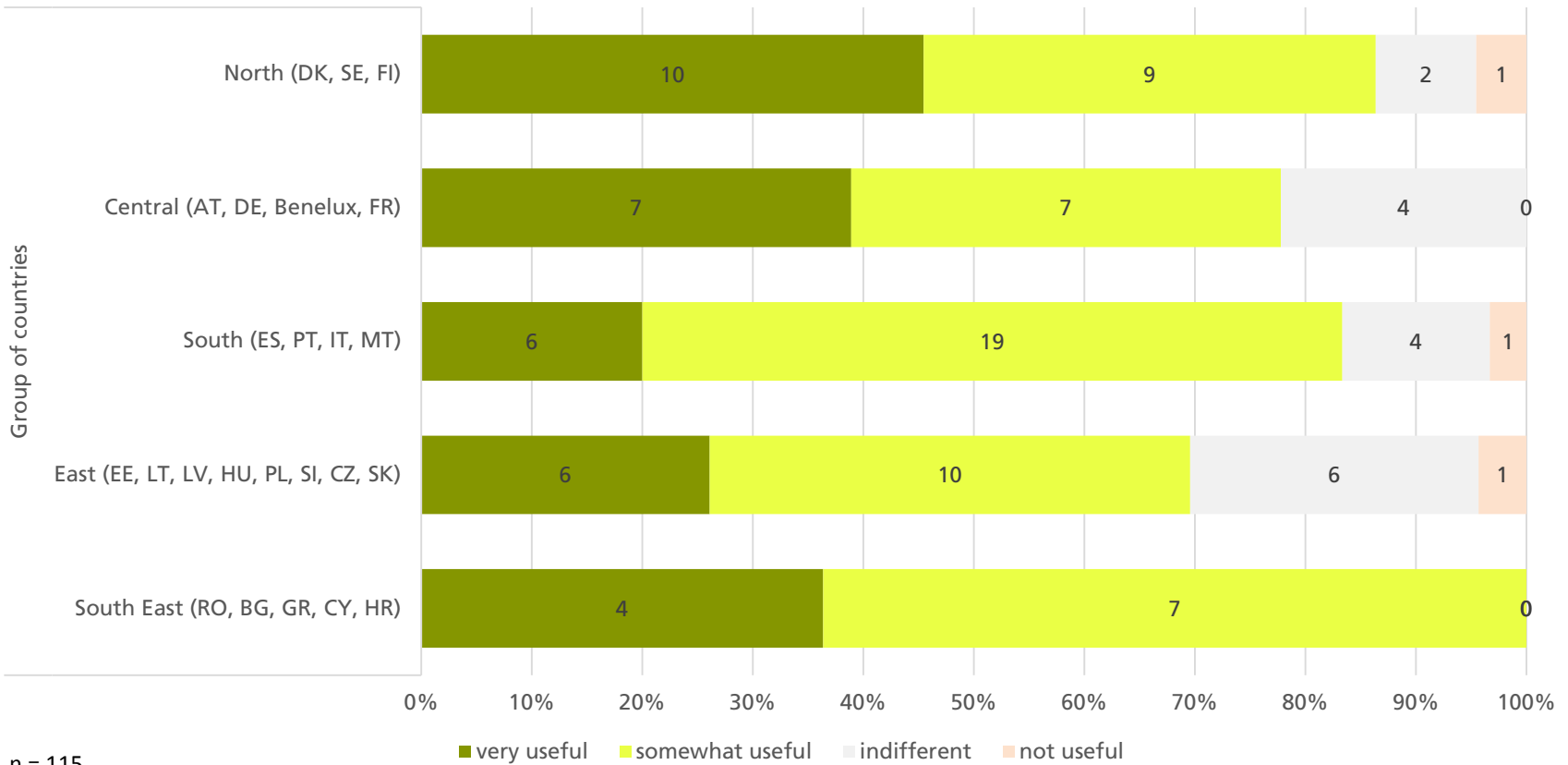
the pilot actions for industrial transition



Do you consider the following activities of the European Commission as useful to improve the design and implementation of innovation policy in your region/nation?

(on a scale from 1-6 with 1 = very useful, 6 = activity not known)

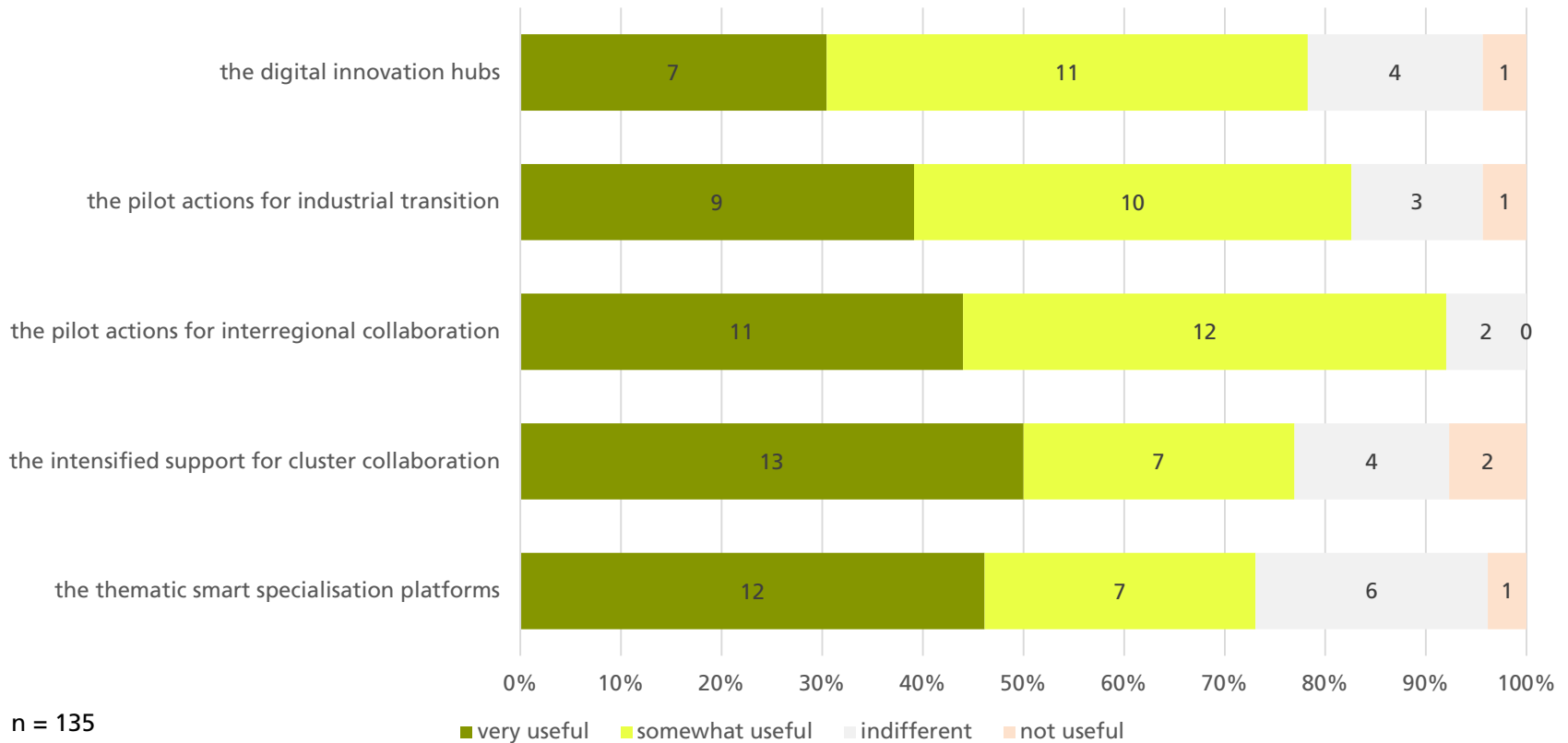
the digital innovation hubs



Do you consider the following activities of the European Commission as useful to improve the design and implementation of innovation policy in your region/nation?

(on a scale from 1-6 with 1 = very useful, 6 = activity not known)

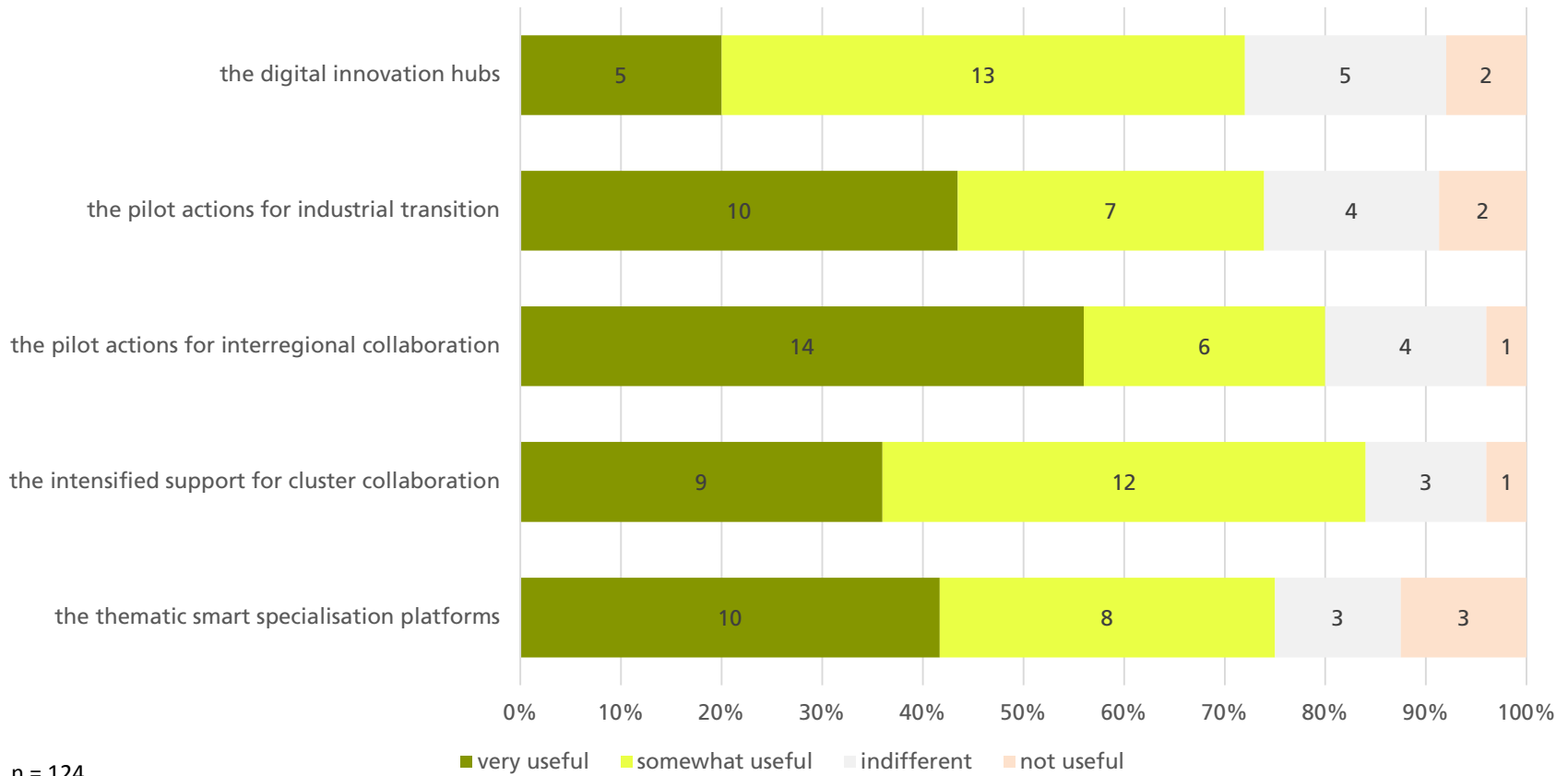
Leading



Do you consider the following activities of the European Commission as useful to improve the design and implementation of innovation policy in your region/nation?

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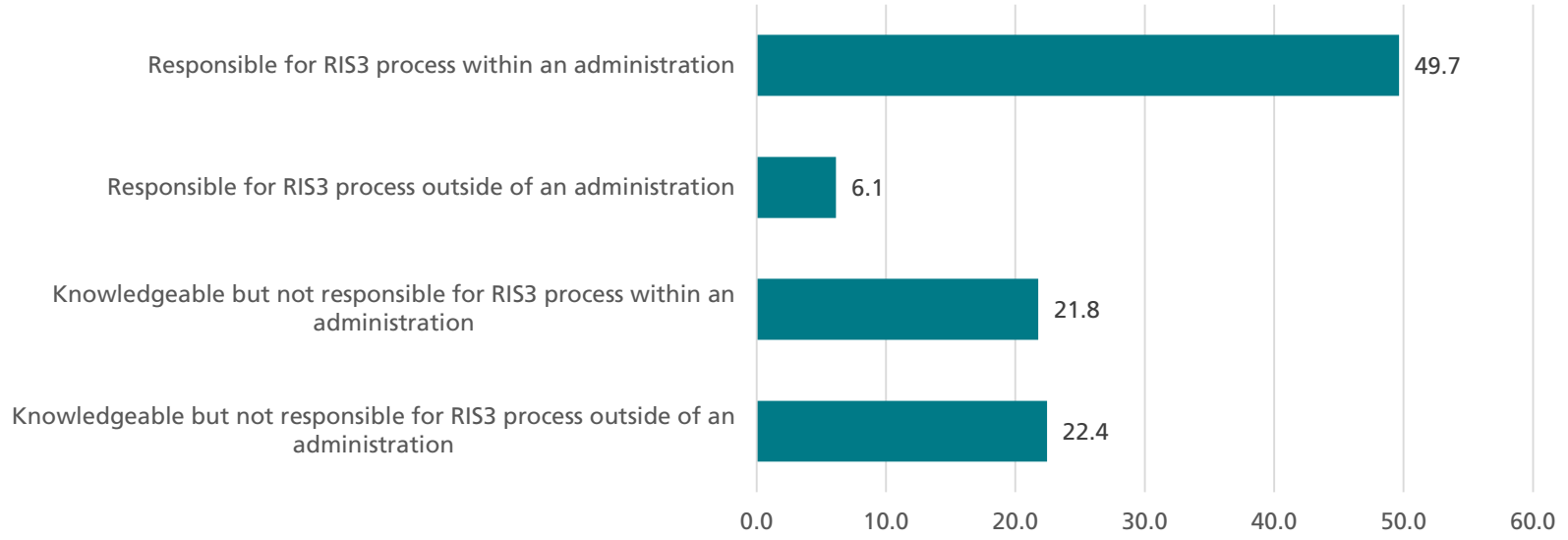
Lagging



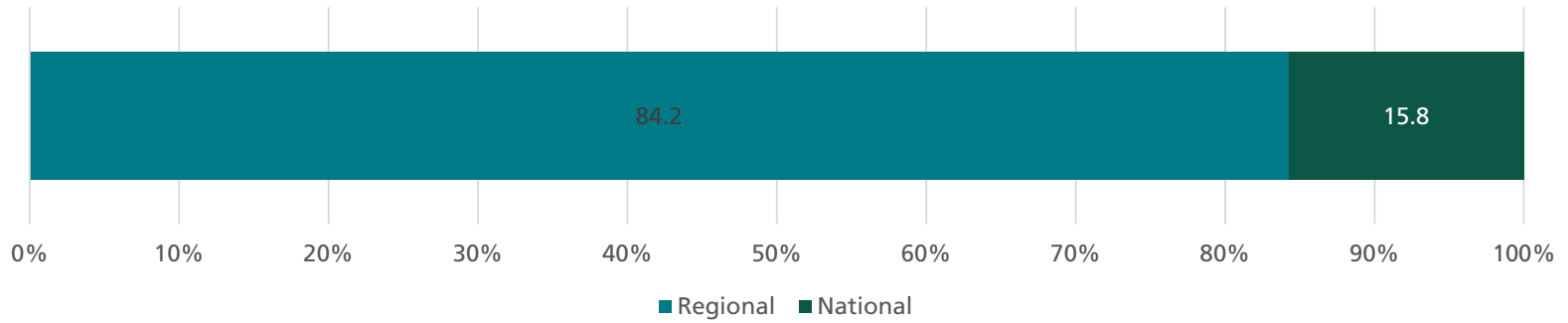
ANNEX, SAMPLE STRUCTURE

- 112 full, 54 partial answers (with a significant number of questions answered)
- Structure of participants:
 - 72% within administration*
 - 85% regional level*
 - 56% directly responsible for process
- Good balance across Member States
 - CE 19%, NE 18%, UK/IE 1%, SE 28%, EE 22%, SEE 12%
- Good balance between leading and lagging regions
 - Leading 24%, upper mid-range 32%, lower mid-range 24%, Lagging 21%
- About 60% had answered earlier rounds of the survey

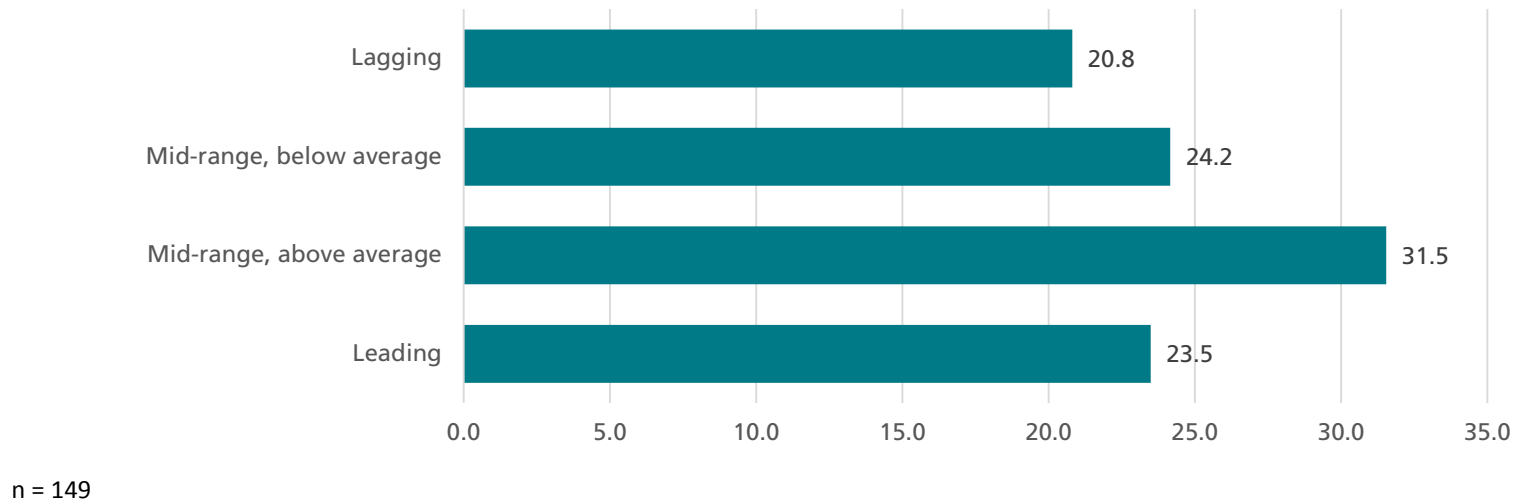
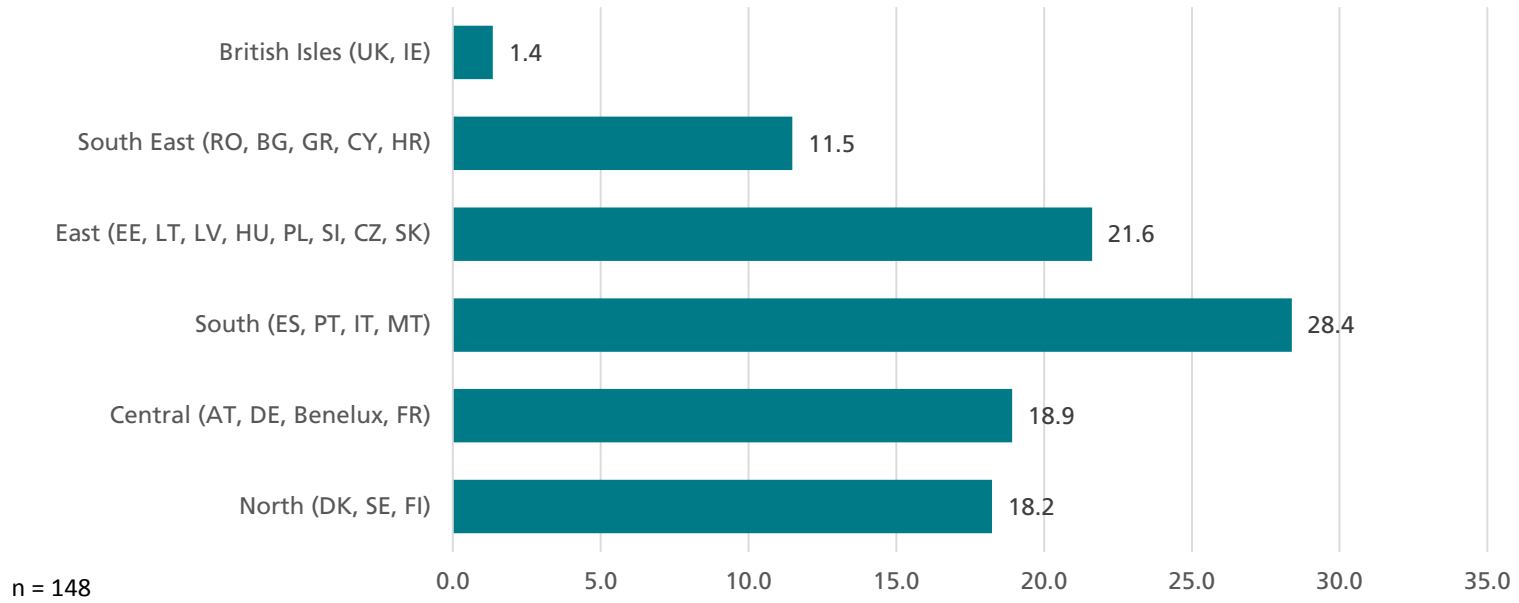
* hence, this summary will at times generically refer to respondents as „policy makers“ and to „regions“ when referring to these respondents' area of reference - always acknowledging that some respondents are not public servants and some reference areas are national



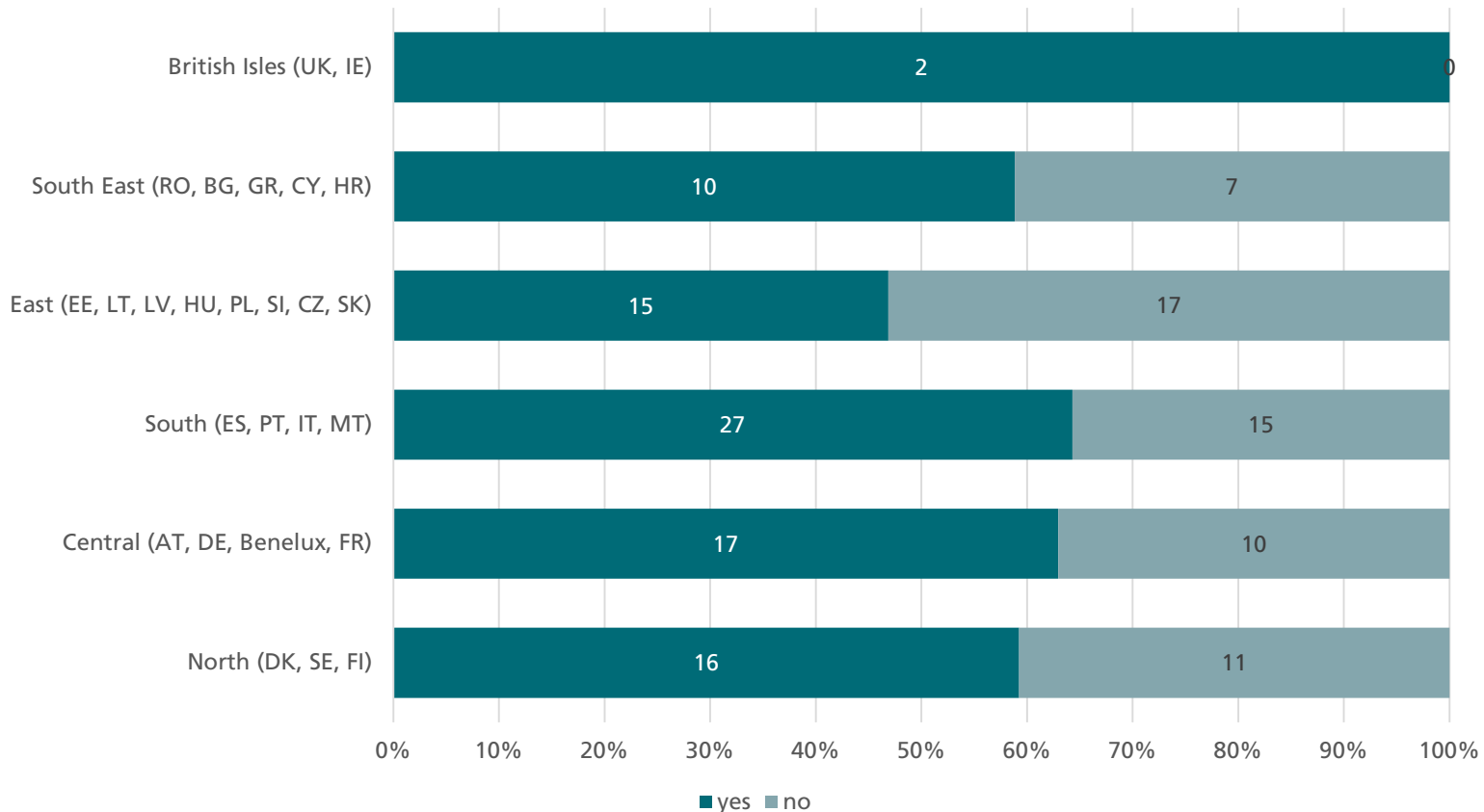
n = 147



n = 146



Did you or a colleague participate in one of Fraunhofer ISI's earlier RIS3 surveys?



n = 147