
FIRST RESULTS OF THE **FRAUNHOFER ISI - RIS3 SURVEY 2015**

compiled by Henning Kroll

(with support of Alexander Kopka)

The sample

- 75% former RCE vs. 25% former Convergence ~ in line with the actual distribution
- Similar contribution from Central, Southern & Eastern, new also: North and UK/IE;
- Predominantly respondents from within the responsible administrations
- Nearly 50% took part in former panels, 25% do not remember

- About one third say they had a RIS3 before, a further third report 'similar' activities
- 75% assert that the process of RIS3 in their region is ongoing
- Nearly 60% report high or very high – stable or increasing – political interest in RIS3

- Taken together 45% state that all or most working groups remain active, yet an equally large group states that continuation of the process is significantly partial,
- >70% state that they expect additional positive outcomes

2015 Coverage

93 fully completed questionnaires,
88 partial (many of with contain a relevant share of information)

dark blue: partially completed questionnaire (region)

dark red: fully completed questionnaire (region)

light blue: partially completed questionnaire (Member State)

light red: fully completed questionnaire (Member State)

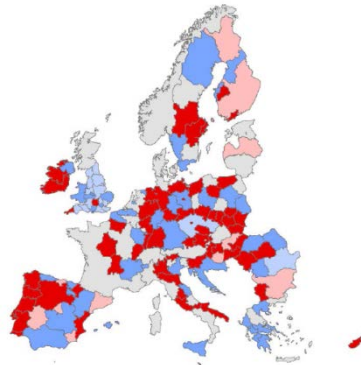
grey: not taken part

*this information on coverage is separated from the actual survey data,
full anonymity is ensured*

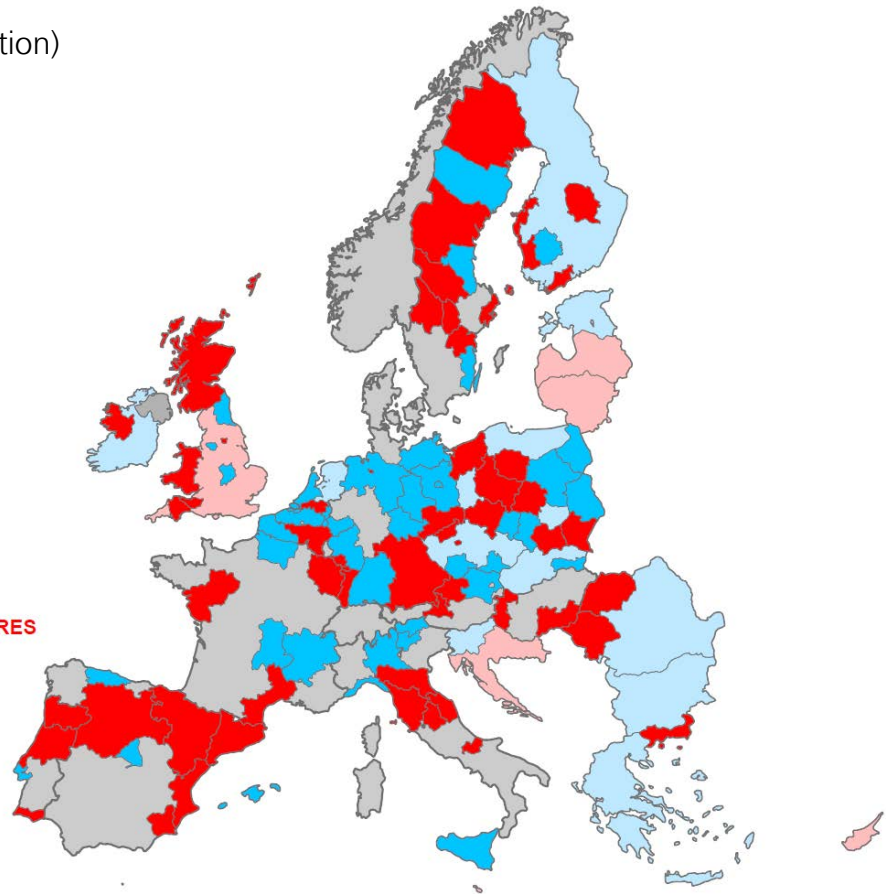
2013



2014



ACORES



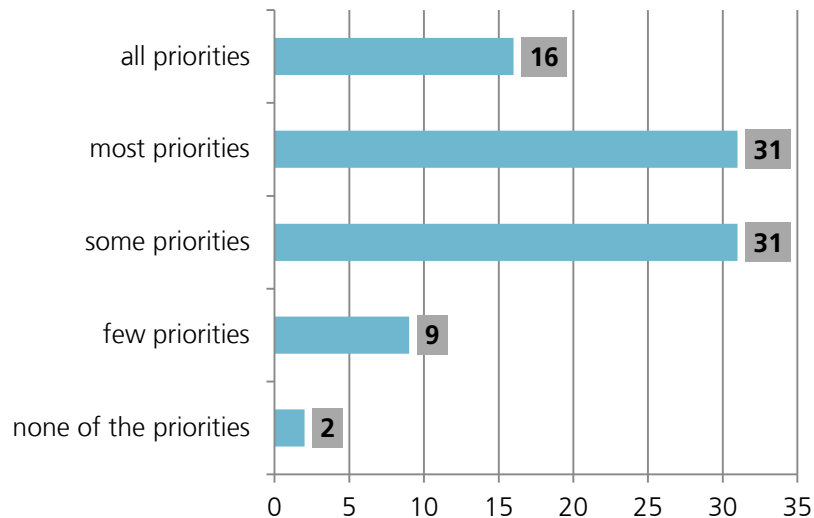
The overall picture: A glass half full, A glass half empty...

There is always a notable share of respondents that say that something at least happens "to a certain extent", "somewhat" or that it applies to "some" areas

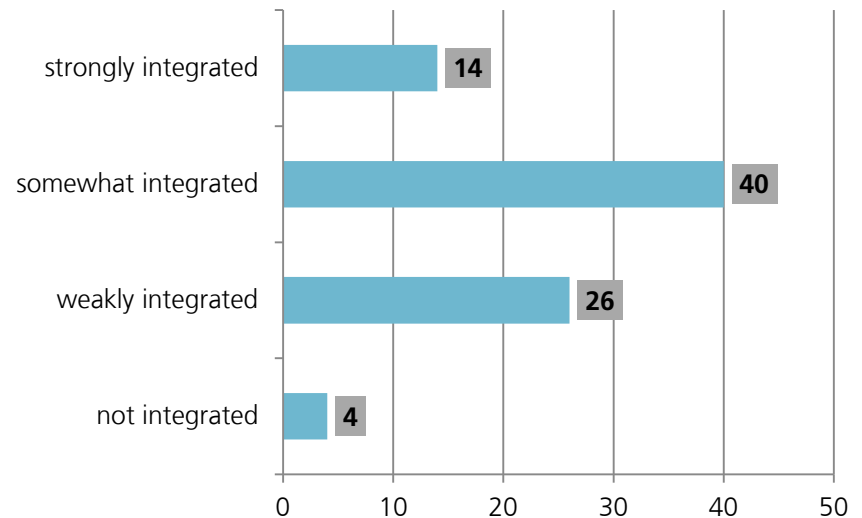
Yet, the number of those committing to the "hard" categories of something happening "to a notable extent", "strongly", or that it applies to "most" areas is usually much lower

Two examples below:

share of priorities reflected in actual policy



practical integration of RIS3 and H2020 at project level



Overall assessment

- More than half still say that benefits outweighed costs
 - >60% report satisfaction with revelation of new facts through EDP
 - >50% report satisfaction with involvement of new stakeholders through EDP
 - <45% report satisfaction with the RIS3-related creation of new skills in administration

- Among the obstacles identified
 - the lack of resources ranks highest (relevant or substantial: 74%),
 - followed by information failure (59%) and professional capacity (53%)
 - administrative preference against bottom-up processes (45%), local policy issues (42%) and vested interests (41%) are perceived as less important

Priorities and implementation

- The number of priorities in a RIS3 strategy is on average somewhat greater than **5**; the largest group has **between 5 and 6**, many also around 3
- **only 45% even claim that these priorities are now (very) precisely defined**
- 42% acknowledge that business participation in their definition was at best limited (however: no evidence that EDPs were overly focused on large, incumbent firms – only 18%)
- still: **>80% state that they would choose/define most or all of their priorities again**
- **about 50% report satisfaction with factual changes in the policy mix as a result of RIS3**
- **nearly 60% consider the link between RIS3 strategy and policies to be (very) strong**
- As an important result, the **launch of new or the adaptation of existing ones** are mentioned less commonly, **43% and 37%** said that those were a notable or substantial outcome (which, however, is still at par with or higher than the number of those who mentioned improved inter-agency collaboration or external consultation as important outcomes)

Practical changes in policy mix

- **67% say that there is room for improvement** regarding their region's current use of focused instrument to implement RIS3 priorities, only 7% see no need for change
- **Only 53% see most or all priorities reflected** in the design of current measures
- **Nearly 40% report that >50% of the ERDF budget is still allocated in a horizontal manner** (54% if extended to more than a quarter of the budget)
- **Case-to-case agreements or expert-panel decisions** are the most common methods to implement priority settings, only 36% report formal mechanisms as relevant or dominant (vs. 71% / 65%)
- **Large-scale projects, focused competitive calls, large-scale demonstrators/R&D infrastructures** are considered the most suitable instruments for RIS3 implementation, less expectations are placed on the focusing of existing, to-date horizontal measures (85%, 80%/81%, 72% vs. 33%)
- Notably, there is no preference between technologically/sectorally focused competitive calls and **challenge oriented competitive calls** – not supporting a “technology bias” in practical RIS3 policy
- **>50% of the respondents still consider horizontal approaches common in most policy areas**
R&D and product innovation support (59%), research infrastructure (54%), science-industry collaboration (64%), cluster policy (61%), human capital and training (63%) and general awareness building (61%) – only for social innovation and public procurement does this figure fall below 40%

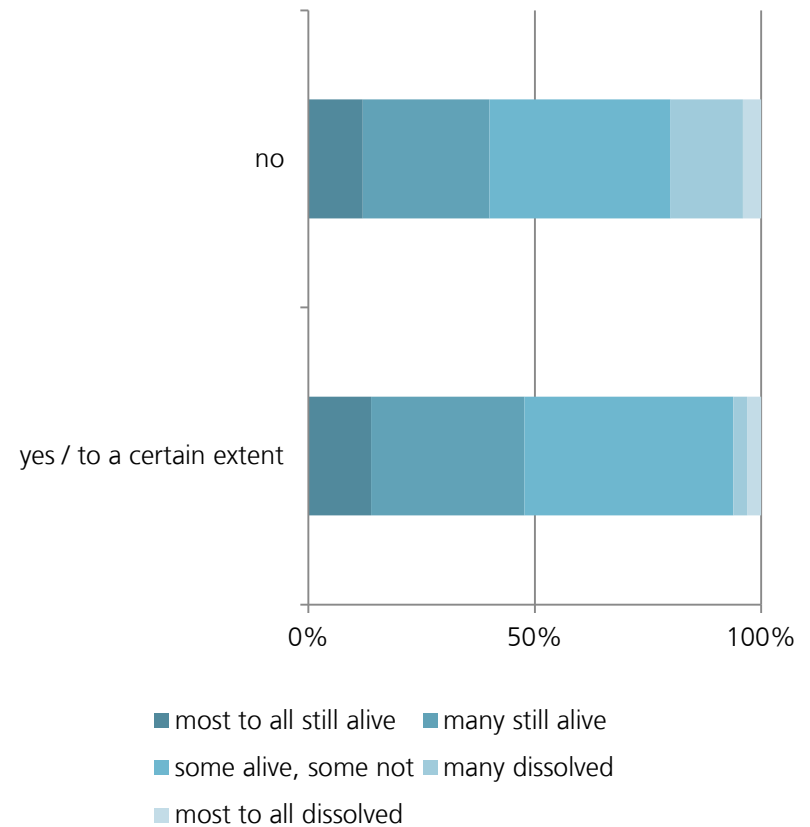
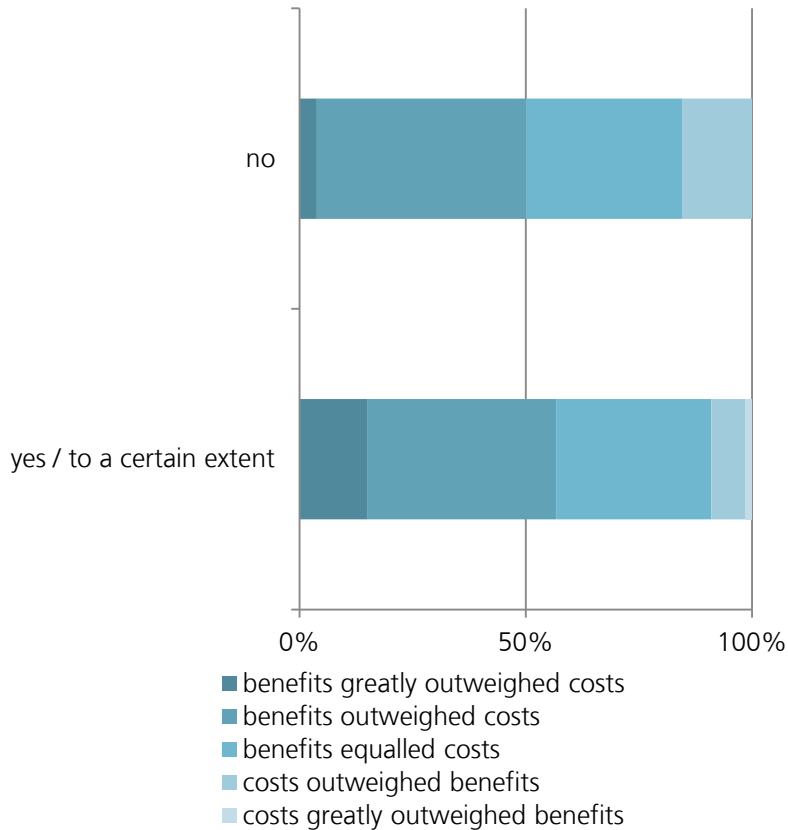
Links between RIS3 and H2020

- Only 26% considered prior FP7 participation 'to a notable extent' in defining their strategy as did 22% with potential synergies (which could emerge in the future)
 - a further 45% acknowledged it 'to some extent' as did 45% with potential synergies
- Only 22% report 'strong' integration between RIS3 and H2020 on the strategic level, 17% see it practices on the level of projects and actions
 - a respective 48%, however, see 'some' integration
- While only 11% see 'major obstacles' to such an integration on the conceptual level, more than 30% experience them in practice (44%, 51% see obstacles 'to some extent')

The interregional dimension

- Only 15% of EDPs identified 'notable' private sector needs that local PRIs cannot fulfil, likewise only 9% identified 'notable' market opportunities outside of the region (57% and 61% respectively identified those to 'some extent')
- In line with this, only 29% report that interregional collaboration within the same nation is addressed in their strategy, and only 26% report this for transnational collaboration
- While only 8% perceive 'strong' obstacles regarding the implementation of interregional collaborations within the same nation, nearly double that share, more than 20%, perceive 'strong' obstacles regarding the implementation of transnational collaborations

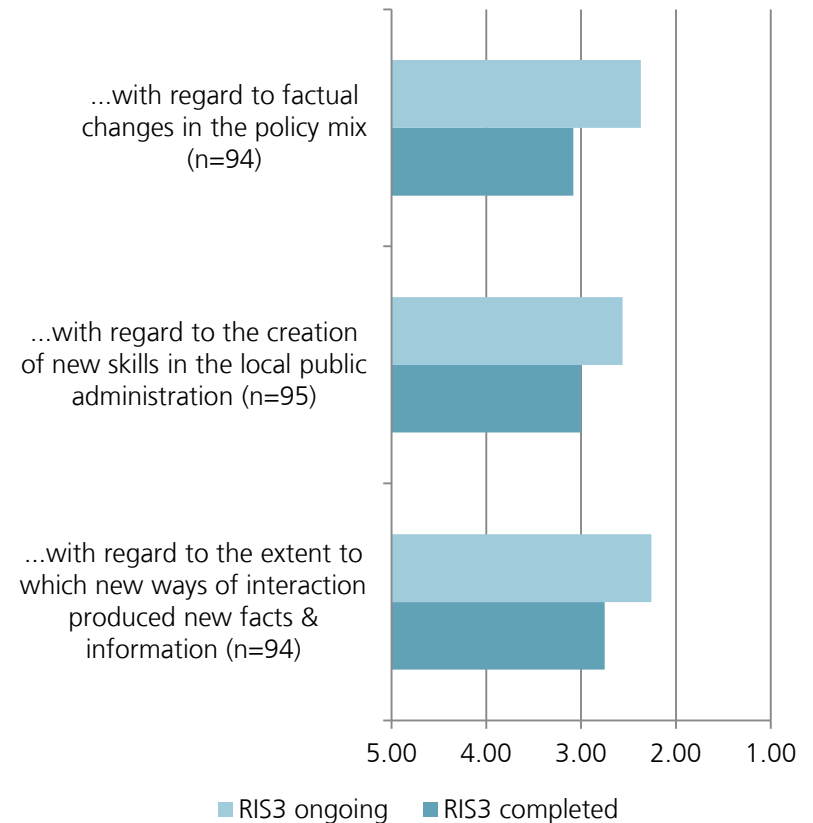
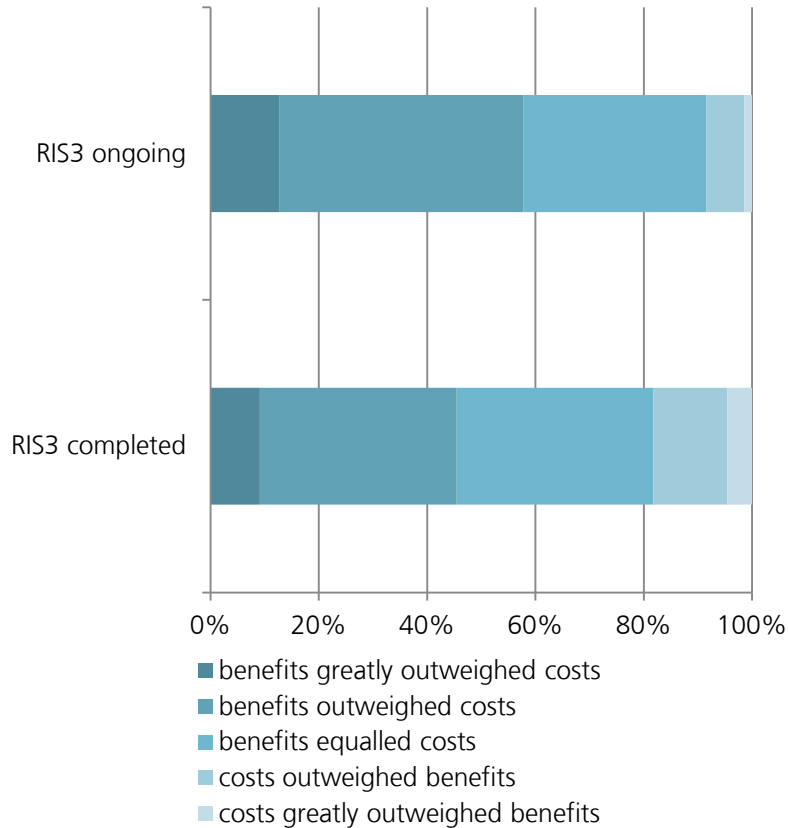
Those that had a RIS3-type strategy before are more satisfied and continue more often



In regions/nations which had not had a RIS3-type process before...

- high-level political backing is/was similar
- yet, interest in the process is less often developing positively
- there is somewhat less optimism
- the link between strategy and policy practice is considered weaker
- the number of priorities is higher (avg. 5,8 vs. 4,8)
- decisions of expert panels are more common
- the reflection of priorities is somewhat weaker
- horizontal measures are somewhat less common
- RIS3-H2020 links played a more limited role in the selection of priorities
- Obstacles to establish such links are considered higher
- Issues of International collaboration are less commonly addressed

Those regions continuing their work on RIS3 are more satisfied and profit more



In regions/nations that continue RIS3 activities today...

- political backing is higher and interest developing more positively (circular conclusion)
- optimism to obtain further results is higher (circular conclusion)
- link between policy and practice is better
- professional capacity is less of an issue, yet resources are
- more confidence about the priorities chosen
- the adaptation of existing actions is considered more commonly
- both a very high and a very low share of budget in horizontal measures is uncommon
- consideration of prior FP7 use in strategy development is more common yet not consideration in definition of priorities, or realisation at strategic / project level
- international collaboration is more commonly addressed in strategies

Differences between weak / strong regions I

Regional Competitiveness & Employment

- Continuation somewhat lower (some say the process is mostly over, not so in Convergence)
- More (already) see a strong link between strategy and implementation
- More are dissatisfied with the factual outcome

- Larger share with > 50% budget still in horizontal measures (42%)
(although a significant share has indeed reduced the share of these measures below <10%)

- Tool of Choice: Competitive calls

Convergence

- Less had a strategy before
- More are very positive, yet also more are very negative about the process (so far)
- Number of priorities notably higher (5,65 vs. 4,73, significant with t-test)
- Effects regarding decision processes and factual policies – notably higher
- Yet, more are ambivalent or pessimistic about future, additional outcomes
- Many are relatively confident about their implementation process, and see a decent reflection of priorities in policy measures
- Yet, more are dissatisfied regarding the creation of skills in the administration and professional capacity remains more of an issue
- Tool of Choice: Large scale investments

Differences between weak / strong regions II

Regional Competitiveness & Employment

- More (32%) did not consider prior H2020 use at all in their analysis
- Factual consideration of H2020 for priority design, however, is about equal

Convergence

- Less realise a factual link between RIS3 and H2020 in practice (projects & actions)
- Higher identification of industry needs that local PRI cannot satisfy,
- Still, international collaboration is much less commonly addressed (6% vs. 35%, 'strong')
- And, perception of 'strong obstacles' to it is more common (33% vs. 19%)

Central Europe

(80% RCE, highest share having a RIS3-type strategy before)

- Very low creation of (additional, not already present) skills in public administration
- Least new facts and information
- >40% of cases with no or no relevant problems regarding resources (avg. ~20-25%)
- Quite limited problems with professional capacity
- The collaboration between different agencies and the consultation of external opinion has changed less than elsewhere
- Many see strong link between strategy and practice (role of businesses in definition notable and mostly balanced)
- **Common mentioning of clearly defined priorities**
- Most common reflection of all priorities in measures
- Most confident that they would do choose exactly the same priorities again
- Limitation of existing, technologically open funding programmes least common
- (New) competitive calls least common
- Second least common consideration of prior FP7 use in region
- International cooperation is second most commonly addressed, yet perceived obstacles to it high

Northern Europe

(all RCE, highest share within administration)

- Notable creation of skills in public administration
- Highest share with all working groups alive & Second highest share with growing political interest
- High share that consider link between strategy & practice weak or very weak
- Most mentioning of “flexible” priorities (with notable exceptions)
- Second most confident that they would do choose exactly the same
- Inter- agency collaboration and the consultation of external opinion has changed less than elsewhere
- Rather uncommon consideration of prior FP7 use in region
- Synergies between RIS3 and H2020 played a role for strategy definition most often
- RIS3-H2020 links occur most often at the projects level yet not to the same extent at the strategy level
- Common identification of local industrial needs that cannot be satisfied by regional public research
- Most common (and only notable) identification of local firm’s market opportunities outside the region
- Interregional dimension both within same nation and internationally is most commonly addressed, (obstacles in this regard are not perceived as overly problematic)

United Kingdom and Ireland

(all but one RCE, very commonly having strategies before)

- Most positive assessment of process, yet close to lowest share of continuation
- Lowest creation of skills in public administration
- None with very high political backing and highest share with fading political interest
- Highest share with ambivalent or pessimistic expectation for coming years
- Highest share that consider link between strategy & practice weak or very weak
- Notable problem with resources, Common problem with professional capacity
- Some substantial problems with information failure in about 1/3 of cases (although limited problems with vested interests)
- High problems with administrative preferences, (role of businesses most limited)
- Most common perception of lack of total lack of awareness for targeted funding
- Least common consideration prior FP7 use in region
- Link between RIS3 and H2020 occurs least often at the level of actual projects
- Strong difference in perception of obstacles for link between RIS3 and H2020 between the factual level as opposed to the conceptual level

Southern Europe

(3/4 RCE)

- Second most positive assessment of process
- Highest share of continuation, Second highest share with all working groups still alive
- **Highest creation of skills in public administration**
- **Second highest share with growing political interest**
- Limited problems with professional capacity and vested interests
- but **common problems with information failure (>70%)** and **administrative preferences**
- Many see strong strategy-practice link (role of business highest, **yet very common role of large firms**)
- **Second most mentioning of clearly defined priorities**
- Common reflection of all priorities in measures , **yet formal selection more common than elsewhere**
- Rarest perception of total lack of awareness for focused funding
- Most common consideration of RIS3-H2020 synergies in the definition of priorities
- RIS3-H2020 links occur most often at strategy level **yet less at the level of actual projects**
- **Difference in perception of obstacles for RIS3-H2020 link at the conceptual level and the factual level**
- **Interregional dimension both within same nation and internationally is least common**
- **Perceived obstacles for collaboration within the same nation second highest**

Central Eastern Europe

(nearly 50% Convergence)

- Least positive assessment of process
- Very limited share of those finding new facts and information, Lowest creation of skills in public administration
- Lowest share of continuation, Most cases with working groups fully or mostly dissolved
- Highest share with low political backing, Second highest share with fading political interest
- Least factual changes and long-term involvement, Second highest share with limited expectations for the coming years
- None that consider link between strategy & practice very strong, highest share that consider it weak or very weak
- By far highest problem with professional capacity; most common problems with resources, information failure (>80%), vested interests, and local politics; above average issues with administrative preferences
- Yet, common mentioning of clearly defined priorities (role of businesses notable, often balanced)
- Possibly explained through: most common next to complete allocation through targeted measures (>90% budget), that is, however, matched by a equally most common lack of allocation through targeted measures (<50% budget)
- Most common perception of lack of total lack of awareness for targeted funding and a most common lack of reflection of priorities in actual funding measures
- For what there is, formal selection procedures are more common than elsewhere
- Link between RIS3 and H2020 occurs second least often at the level of actual projects
- Most common identification of local industrial needs that cannot be satisfied by regional public research organisations
- International cooperation is least commonly addressed, obstacles for collaboration perceived as high, both within the same nation and internationally

Summary

- Overall results still positive, at least in the sense of a ‚glass half full‘ perspective
- Generally rather discouraging results regarding S2E and outward-orientation
- Regions with prior experience in RIS3-type exercises are somewhat more satisfied and more likely to continue their efforts
- Evidence that the continuation of RIS3 processes and working groups (beyond ex-ante) pays off in terms of results
- **Central Europe** remains the most fertile ground, yet also the group in which respondents learned least and remained somewhat resistant to change horizontal approaches
- **Northern European** regions constitute dynamic co-leaders with best results regarding RIS3-H2020 linkages and outward orientation (because they are small?)
- **UK, IE:** an apparently difficult yet positively assessed RIS3 process – which is likely to be discontinued
- **Southern European** regions continue to dynamically profit and report (the most) positive results in many respects, yet also information failure and adverse administrative preferences
- **Eastern Europe:** still the group with most issues in which many processes had to be started from the very basics, did not get far and are most likely to cease soon; encouragingly only, there is evidence that in some regions, the picture must be different

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