GE Global Innovation Barometer 2013 Results – Focus Germany
GE global innovation barometer methodology

Now in its third edition and spanning across 25 countries, the GE Global Innovation Barometer is an International opinion survey of senior business executives actively engaged in the management of their firm Innovation strategy.

The survey is conducted by StrategyOne a consulting and research company and funded by GE. The barometer examines the way business executives around the world appreciate the framework for Innovation their country has developed, it also details the perspective from business on the most efficient policies to support Innovation.

Finally it adopts a firm centric approach to better understand the way International businesses adapt their innovation practices and strategies in a challenging economic environment.

Sample covers a diversity of economic sectors

- Manufacturing 17%
- FMCG 11%
- Energy 10%
- Automotive / Transport / Logistics 10%
- Electronics 10%
- Industrial Products 8%
- Professional Services 8%
- High-tech / IT 6%
- Telecom / Internet 2%
- Other Manufacturing 17%
- Health 13%
- FMCG 11%

8 out of 10 respondents are men (no quota)
Sample and fieldwork details

3100 phone interviews (in local languages)

25 markets (tracking in 20 markets for 2 years and 10 markets for 3 years)

Questionnaire average duration: 38 Minutes

Period: October 22nd to December 5th 2012

All respondents directly involved in the innovation strategy or process within their company. (28% C-Level).

Average company size is 1 200 employees

Average age of respondent is 43 years old.
Germany Executive Summary
Innovation is a strategic priority for German businesses (95% of German respondents report innovation is a strategic priority for their business).

Various types of innovation are expected to drive the performance of German businesses in the future:

• the improvement of existing products or services (89% - this is 10 pts higher than the global average);
• the development of new business processes to improve profitability (68%; +5pts / global average);
• the development of more sustainable and eco-friendly processes, products or services (67%; +19 pts / global average)
• the development of entirely new products or services (67%)
• the development of more affordable new products or services for the customer (66%; +10pts / global average)

53% of respondents believe that the ability to mine data inside and outside the company is important for a company to innovate successfully, but German business executives seem less convinced by the driving power of Business model Innovation: the development of new business models comes in last position as only 32% of German respondents expect this activity to drive the performance of their business in the future.
To Innovate successfully German respondents identify key abilities their business have to master:

• Understand customers and anticipate market evolutions (91% - this is 10 points above the global average)
• Attract and retain innovative people (79% - 6 points above average)
• Develop new technology (66%)
• Create an environment and culture conducive to innovation (62%)
• Weed out unpromising innovations at an early stage (62%)
Overall the framework for innovation in Germany is perceived as innovation conducive: 85% of GLOBAL respondents describe Germany as such (making it the country most reputed to offer a positive framework for innovation)

When evaluating their own market 89% of German business executives report that their country has a strong innovation-conducive environment overall.

While this suggest that German business is confident in their own Innovation eco-system, detailed evaluation of the different components of this framework helps refine the diagnosis.

On the negative side, the level and efficiency of governmental support is quite weakly evaluated by German respondents. On the positive side, partnerships between universities and companies, the appetite of younger generations for innovation and the quality of education are generally praised.

When looking at the evolution of these indicators compared to last year, the effectiveness of the protection of the copyright and the patent is evaluated more negatively with a 10% drop from last year while some other items are improving, like the perception that the speed at which innovative products are brought to market is adequate (18pts increase).

Support from private investors for companies that need funding to innovate is also perceived as improving compared to last year’s low point.
German business executives perceive Innovation as a positive force and a key driver for their economy, signs of anxiety that it could also set a challenge for business by increasing competition and by accelerating the lifecycle of products and services are more limited than in other markets: in Germany, 14% of respondents believe “Innovation has a negative impact on their economy” a results much lower than the global average (30%)

However Business still expects renewed support and incentives from policymakers, particularly regarding:

• Fighting bureaucracy and red tape for companies willing to access funds and incentives allocated to innovation (48% / in line with the global average)
• Ensuring that business confidentiality and trade secrets are adequately protected (40% / in line with the global average)
• Encouraging a stronger entrepreneurial culture in the education system through stronger linkages between students and business savvy individuals (40% / 10 points below the global average).
Growing trends from the barometer indicate that Innovation can start from all kind of economic actors (73% of German respondents in 2013 believe that SMEs and Individuals can be as innovative as large companies – a three point increase from 2012).

This validates the perception that collaboration is key to innovate more successfully: 84% of respondents believe they would be more successful at innovation through partnership than if their company went about it alone compared to 87% global average.

Business in Germany would like to partner first to access new technology (84%), improve an existing product or service (81%) and enter new markets (81%). Sharing costs and inventing new products are drivers that are above global average in Germany.

The barriers to collaborative Innovation are also clearly identified: lack of protection of confidentiality/IP (80%), lack of trust (49%) and talent/knowledge poaching (46%).
Innovation is a strategic priority for business globally
Innovation on top of business agenda: 95% of respondents would say it is a strategic priority for their company (vs. 91% average)

Q1. Would you say that for your company innovation is…:

<table>
<thead>
<tr>
<th>Strategic Priority</th>
<th>Germany</th>
<th>Global Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>A very high strategic priority</td>
<td>50%</td>
<td>44%</td>
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<tr>
<td>A quite high strategic priority</td>
<td>45%</td>
<td>47%</td>
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<tr>
<td>A quite low strategic priority</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>A very low strategic priority</td>
<td>0%</td>
<td>1%</td>
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</table>
Innovation types and business performance: looking back and looking forward
What kind of Innovation drove business performance in the past in Germany?

Q2. What kinds of innovation have contributed most to your company’s performance in the past few years?

German results vs. 25 markets Global Average

- The development of new business models
- The development of entirely new products or services
- The development or improvement of products customized to local circumstances or conditions
- The development of more affordable new products and services for the customer
- The development of new customer services
- The development of more sustainable and eco-friendly processes, products or services
- The improvement of existing products or services
- The development of new business processes to improve profitability
A future gazing exercise: what will drive future business performance in Germany?

Q3: What kinds of innovation do you expect to contribute the most to your company’s performance in the future?

German results vs. 25 markets Global Average

- The improvement of existing products or services
- The development of new business processes to improve profitability
- The development of more sustainable and eco-friendly processes, products or services
- The development of entirely new products or services
- The development of more affordable new products and services for the customer
- The development of new customer services (CRM, After Sales, Loyalty etc)
- The development or improvement of products or services customized to local circumstances or conditions
- The development of new business models

[Bar chart showing percentages for each type of innovation, with Germany and Global results compared.]
Key abilities innovative firms master better
To Innovate successfully business need to master market insight, technology development, partnerships, talent and culture

Q4. How important do you think these abilities are for a company to innovate successfully? (Importance grade on 10 points, % High importance [Top 3 boxes])

- Understand customers and anticipate market evolutions: 81%
- Attract and retain innovative people: 73%
- Develop new technology: 66%
- Identify and work collaboratively with the best business partners: 66%
- Create an environment and culture conducive to Innovation: 64%
- Manage and take risks: 60%
- Invest on long term innovative projects: 59%
- Allocate a specific budget for Innovation activities: 54%
- Challenge generally accepted practices and ways of working: 54%
- Mine data inside and outside the company: 53%
- Manage an innovation pipeline with a structured business process: 52%
- Weed out unpromising innovations at an early stage: 51%
- Come up with new business models: 45%
- Attract investors to fund innovative programs: 34%
Increased competition and protectionist temptation: A global innovation vertigo?
The net positive impact of Innovation on local economies is challenged by 30% of respondents: a globalization anxiety?

Q5-2. By creating more competition among businesses and making some products and services obsolete, innovation has a negative impact on my country’s economy (% Agree)

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>11%</th>
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<tr>
<td>Somewhat agree</td>
<td>19%</td>
</tr>
<tr>
<td>Somewhat disagree</td>
<td>28%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>38%</td>
</tr>
<tr>
<td>Don’t know / Unsure</td>
<td>3%</td>
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</tbody>
</table>
The positive impact of Innovation on local economies is challenged: greater competition and shorter business lifecycles

Q5-2. By creating more competition among businesses and making some products and services obsolete, innovation has a negative impact on my country’s economy

Strongly agree
Somewhat agree
Opening up the market or national preference, paradoxical tensions seem to exist within global business

Q9. What are the main priorities your country should focus on to efficiently support innovation?

Q9-8. Promote domestic rather than imported technological development via preferences in government procurement

Q9-11. Promote the importation of innovative technologies by opening the market further to foreign trade and investment
Expectations regarding the policy focus to be adopted are contradictory and vary greatly from one market to another.

Q9: What are the main priorities your country should focus on to efficiently support innovation? (%Top 2 grades = very high priority)
Role of SMEs and need for greater localization: the trend keeps building up globally
A growing consensus around the need for innovation to be embracing the specificities of local market needs

Q5. 1 - More than ever before, innovation needs to be localized to serve specific market needs

Average 20 markets 2012: 76%
Average 20 markets 2013: 84% (+ 8pts)
Q5. 3 - More than ever before, SMEs and individuals can be as innovative as large companies

Average 20 markets 2012: 79%
Average 20 markets 2013: 84% (+5pts)
A contraction of the Global environment for Innovation
How do respondents evaluate their country’s Innovation framework? No major change in Global ranking, strong new entries

Index on 100 points summarizing the perceptions of respondents regarding 13 dimensions of the Innovation framework of their country.
<table>
<thead>
<tr>
<th></th>
<th>% Agree 2013</th>
<th>Gap / 2012</th>
<th>Gap / Average 25 markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government and public authorities allocate an adequate share of their budget to support innovative companies</td>
<td>49%</td>
<td>+ 9 pts</td>
<td>+ 4 pts</td>
</tr>
<tr>
<td>Governmental support for innovation is efficiently organized and coordinated</td>
<td>35%</td>
<td>+ 5 pts</td>
<td>- 5 pts</td>
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<tr>
<td>It is quite easy for companies to partner with universities for their R&amp;D needs</td>
<td>86%</td>
<td>+ 6 pts</td>
<td>+ 21 pts</td>
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<tr>
<td>Local universities and schools provide a strong education model for tomorrow's innovative leaders</td>
<td>72%</td>
<td>+ 2 pts</td>
<td>+ 15 pts</td>
</tr>
<tr>
<td>Private investors are supportive of companies that need funding to innovate</td>
<td>54%</td>
<td>+ 16 pts</td>
<td>- 4 pts</td>
</tr>
<tr>
<td>Public-private partnerships have proved effective in supporting innovation</td>
<td>63%</td>
<td>+ 3 pts</td>
<td>- 2 pts</td>
</tr>
<tr>
<td>Society as a whole is accepting of taking risks as part of the innovation process</td>
<td>43%</td>
<td>+ 13 pts</td>
<td>- 23 pts</td>
</tr>
<tr>
<td>Society as a whole is supportive of innovation, there is an appetite for innovation among young generations</td>
<td>81%</td>
<td>+ 6 pts</td>
<td>+ 2 pts</td>
</tr>
<tr>
<td>The general public is convinced of the value innovation can bring to their day-to-day life</td>
<td>77%</td>
<td>+ 20 pts</td>
<td>+ 2 pts</td>
</tr>
<tr>
<td>The protection of the copyright and the patent are effective</td>
<td>57%</td>
<td>- 10 pts</td>
<td>- 2 pts</td>
</tr>
<tr>
<td>The speed at which innovative products are brought to market is adequate</td>
<td>59%</td>
<td>+ 18 pts</td>
<td>- 1 pt</td>
</tr>
<tr>
<td>Trade regulations are not preventing firms from being commercially successful</td>
<td>56%</td>
<td>+ 24 pts</td>
<td>- 4 pts</td>
</tr>
</tbody>
</table>
Detailed results per component & market
Private investment stagnation, a positive exception in Germany

Q6. 1 - Private investors are supportive of companies that need funds to innovate

Average 20 markets 2012: 59%

Average 20 markets 2013: 57% (-2pts)

Private investment stagnation, a positive exception in Germany
IP protection a growing concern, including in China

Q6. 2 - The current IP protection system does not present barriers to innovation

Average 20 markets 2012: 64%
Average 20 markets 2013: 59% (-5pts)
Contrasted evolution regarding universities’ ability to train talents

Q6. 3 - Universities and schools provide a strong education model for tomorrow’s innovative leaders

Average 20 markets 2012: 61%

Average 20 markets 2013: 55% (-6pts)
Lower financial support from Governments overall

Q6. 5- Government and public authorities allocate an adequate share of their budget to support innovative companies

Average 20 markets 2012: 47%
Average 20 markets 2013: 45% (-2pts)
The organization of government incentive to innovation is criticized

Q6. 6 - Governmental support for innovation is efficiently organized and coordinated

Average 20 markets 2012: 43%

Average 20 markets 2013: 39% (-4pts)
On the positive side: a growing appetite from young generations

Q6. 8 - Society as a whole is supportive of innovation, there is an appetite for innovation among young generations

Average 20 markets 2012: 76%
Average 20 markets 2013: 77% (+1pt)
On the positive side: greater societal support

Q6. 9 - The general public is convinced of the value innovation can bring to their day-to-day life

<table>
<thead>
<tr>
<th>Country</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>90%</td>
<td>86%</td>
</tr>
<tr>
<td>Nigeria</td>
<td>78%</td>
<td>77%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>74%</td>
<td>83%</td>
</tr>
<tr>
<td>Ireland</td>
<td>83%</td>
<td>77%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>83%</td>
<td>72%</td>
</tr>
<tr>
<td>India</td>
<td>69%</td>
<td>69%</td>
</tr>
<tr>
<td>Germany</td>
<td>76%</td>
<td>63%</td>
</tr>
<tr>
<td>S Africa</td>
<td>78%</td>
<td>66%</td>
</tr>
<tr>
<td>Russia</td>
<td>83%</td>
<td>68%</td>
</tr>
<tr>
<td>Australia</td>
<td>72%</td>
<td>70%</td>
</tr>
<tr>
<td>Brazil</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Japan</td>
<td>70%</td>
<td>68%</td>
</tr>
<tr>
<td>Turkey</td>
<td>79%</td>
<td>74%</td>
</tr>
<tr>
<td>USA</td>
<td>69%</td>
<td>71%</td>
</tr>
<tr>
<td>S Korea</td>
<td>83%</td>
<td>79%</td>
</tr>
<tr>
<td>China</td>
<td>79%</td>
<td>85%</td>
</tr>
<tr>
<td>Sweden</td>
<td>61%</td>
<td>63%</td>
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<tr>
<td>UK</td>
<td>63%</td>
<td>78%</td>
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<tr>
<td>Singapore</td>
<td>79%</td>
<td>85%</td>
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<tr>
<td>UAE</td>
<td>73%</td>
<td>95%</td>
</tr>
<tr>
<td>Mexico</td>
<td>57%</td>
<td>85%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>74%</td>
<td>85%</td>
</tr>
<tr>
<td>Israel</td>
<td>68%</td>
<td>80%</td>
</tr>
<tr>
<td>Poland</td>
<td>76%</td>
<td>68%</td>
</tr>
<tr>
<td>Canada</td>
<td>68%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Average 20 markets 2012: 68%
Average 20 markets 2013: 73% (+5pts)
On the positive side: greater tolerance to Innovation related risks

Q6. 10 - Society as a whole accepts that taking risks is part of the innovation process

Average 20 markets 2012: 59%
Average 20 markets 2013: 63% (+4pts)
What policies would support Innovation most efficiently?
Education, fighting bureaucracy and protecting trade secrets evaluated as the most pressing priorities to support Innovation

Q9. What are the main priorities your country should focus on to efficiently support innovation?
Grade on 10 points where 10 means it should be a VERY STRONG priority and 1 a VERY LOW one, (% Top 2 grades)

- Encourage a stronger entrepreneurial culture in the education system through stronger linkages between students and business savvy individuals: Germany - 40% (-10 pts)
- Fight bureaucracy and red tape for companies willing to access funds and incentives allocated to innovation: Germany - 48% (=)
- Better align students curricula with the needs of business: Germany - 27% (-17 pts)
- Ensure that business confidentiality and trade secrets are adequately protected: Germany - 40% (-1 pt)
- Create a financial environment that encourages the development of venture capital: Germany - 14% (-24 pts)
### Education, fighting bureaucracy and protecting trade secrets evaluated as the most pressing priorities to support Innovation

**Q9 What are the main priorities your country should focus on to efficiently support innovation?**

*Grade on 10 points where 10 means it should be a VERY STRONG priority and 1 a VERY LOW one, (% Top 2 grades)*

<table>
<thead>
<tr>
<th>Priority</th>
<th>Grade</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create more incubators and facilities for start-ups to develop</td>
<td>22%</td>
<td>-14 pts</td>
</tr>
<tr>
<td>Promote domestic rather than imported technological development</td>
<td>21%</td>
<td>-12 pts</td>
</tr>
<tr>
<td>via preferences in government procurement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boost funding for public research programs</td>
<td>13%</td>
<td>-18 pts</td>
</tr>
<tr>
<td>Introduce results-based incentives for public research programs</td>
<td>36%</td>
<td>+6 pts</td>
</tr>
<tr>
<td>Promote the importation of innovative technologies by opening the</td>
<td>4%</td>
<td>-23 pts</td>
</tr>
<tr>
<td>market further to foreign trade and investment</td>
<td></td>
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</tr>
<tr>
<td>Implement an innovation and entrepreneurship awareness program</td>
<td>11%</td>
<td>-14 pts</td>
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<tr>
<td>promoting these values and targeting the general public</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stimulate innovation through the use of commercially based public</td>
<td>7%</td>
<td>-14 pts</td>
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<tr>
<td>procurement</td>
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</table>

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**Clustering markets depending on Policy priorities**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Japan</th>
<th>Singapore</th>
<th>South Korea</th>
<th>China</th>
<th>Australia</th>
<th>Turkey</th>
<th>Brazil</th>
<th>Poland</th>
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<tbody>
<tr>
<td>Encourage a stronger entrepreneurial culture in the education system through stronger linkages between students and business savvy individuals</td>
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<td>Fight bureaucracy and red tape for companies willing to access funds and incentives allocated to innovation</td>
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<td>Better align students curricula with the needs of business</td>
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<td>Ensure that business confidentiality and trade secrets are adequately protected</td>
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<tr>
<td>Create a financial environment that encourages the development of venture capital</td>
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<td>Create more incubators and facilities for start-ups to develop</td>
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Stronger regulation on talent mobility have had a noticeable impact on Business ability to Innovate

Q5-4. Over the last two years, it has become more difficult for companies to hire talented foreign citizens because of stricter visa requirements and it had a negative impact on their ability to innovate.
What countries are perceived as displaying the most innovation conducive environment?
EVALUATION OF INNOVATION ENVIRONMENT

Global Evaluation /10 vs. Auto evaluation /10 for various countries:
- USA
- Brazil
- Canada
- Mexico
- China
- India
- Singapore
- Australia
- Japan
- South Korea
- Germany
- Sweden
- UK
- Poland
- UAE
- Israel
- Turkey
- Nigeria
- South Africa
- Ireland
- Netherlands

The graph shows a correlation between Global Evaluation and Auto evaluation for different countries, with scores ranging from 3.5 to 9.0.
How do German business executive evaluate other markets Innovation environment?

Q8. For each of the following markets, how far would you say that they have developed an innovation-conducive environment?

% of respondents that evaluate a market Innovation environment positively by giving it a grade between 7 an 10/10 points (Global perception vs. perception measured among German respondents only)
Collaborative Innovation: review of drivers and barriers, experience and policy framework
Collaborative Innovation has a Global appeal

Q11: Measuring the appetite for collaboration

I am fully convinced that our firm could be more successful with innovation through partnership and collaboration than if we go about it alone

- **Strongly agree**: 53%
- **Somewhat agree**: 34%
- **Somewhat disagree**: 7%
- **Strongly disagree**: 4%

% Agree
Global: 87%
Germany: 84%

Our firm has been changing the way it looks at innovation to integrate more of the need for collaboration both inside and outside the firm

- **Strongly agree**: 38%
- **Somewhat agree**: 44%
- **Somewhat disagree**: 11%
- **Strongly disagree**: 5%

% Agree
Global: 82%
Germany: 76%

I think my firm is open to sharing the revenue stream or the revenue losses that could be generated through a collaborative innovation initiative

- **Strongly agree**: 28%
- **Somewhat agree**: 45%
- **Somewhat disagree**: 16%
- **Strongly disagree**: 6%

% Agree
Global: 73%
Germany: 61%
Partnership is globally seen as an opportunity to succeed

Q11 Measuring the appetite for collaboration
Q11-2: I am fully convinced that our firm could be more successful with innovation through partnership and collaboration than if we go about it alone

Average: 53%
Emerging markets leading preparing even more strongly to partner

Q11 Measuring the appetite for collaboration
Q11-1: Our firm has been changing the way it looks at Innovation to integrate more of the need for collaboration both inside and outside the firm

Average: 38%
Revenue sharing model: a more difficult question to solve

Q11 Measuring the appetite for collaboration
Q11-3: I think my firm is open to sharing the revenue stream or the revenue losses that could be generated through a collaborative innovation initiative

Average: 28%
Q15 Still on collaboration, what are the main reasons why your company would seek to collaborate with entrepreneurs or other companies?

- To access new technology: 79%
- To enter new markets: 79%
- To improve an existing product or service: 75%
- To speed up time to market: 72%
- To invent a new product: 70%
- To improve the profitability of an existing offer: 69%
- To gain insights and market intelligence: 69%
- To scale up: 69%
- To benefit from a company’s sales force: 58%
- To share costs: 56%
- To license patents and technology: 54%
- To invent a new business model: 54%

Germany:
- 84% (+5 pts)
- 80% (+1 pt)
- 81% (+6 pts)
- 71% (-1 pt)
- 81% (+11 pts)
- 67% (-2 pts)
- 64% (-5 pts)
- 61% (-8 pts)
- 64% (+6 pts)
- 65% (+9 pts)
- 52% (-2 pts)
- 46% (-8 pts)
Q16. Still on collaboration, what are the main reasons why your company would be reluctant to collaborate with entrepreneurs or other companies? (% of respondent that selected the item as a barrier)

<table>
<thead>
<tr>
<th>Reason</th>
<th>% Respondent</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of Protection of confidentiality / IP</td>
<td>47%</td>
<td>+16 pts</td>
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<tr>
<td>Lack of trust in the partner company</td>
<td>45%</td>
<td>+2 pts</td>
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<tr>
<td>Talent / Knowledge poaching</td>
<td>39%</td>
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<tr>
<td>Lack of a tested Collaboration Process and Collaboration Tools</td>
<td>36%</td>
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<td>Fears over unequal revenue splits</td>
<td>31%</td>
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<tr>
<td>We don’t know how to attract potential partners</td>
<td>28%</td>
<td></td>
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<tr>
<td>We don’t have time to allocate to managing the partnership</td>
<td>28%</td>
<td></td>
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<tr>
<td>I don’t know if my company is ready or able to be working in partnership</td>
<td>22%</td>
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</tr>
<tr>
<td>We don’t have time to allocate to meeting possible partners</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>The company is bigger than ours</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Our culture is too closed</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>The company is foreign</td>
<td>11%</td>
<td>-7 pts</td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of Protection of confidentiality / IP</td>
<td>80% (+16 pts)</td>
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<tr>
<td>Lack of trust in the partner company</td>
<td>49% (+2 pts)</td>
<td></td>
</tr>
<tr>
<td>Talent / Knowledge poaching</td>
<td>46% (+1 pt)</td>
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<tr>
<td>Lack of a tested Collaboration Process and Collaboration Tools</td>
<td>29% (-10 pts)</td>
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<td>Fears over unequal revenue splits</td>
<td>32% (-4 pts)</td>
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<td>21% (-10 pts)</td>
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<td>We don’t have time to allocate to managing the partnership</td>
<td>23% (-5 pts)</td>
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<tr>
<td>I don’t know if my company is ready or able to be working in partnership</td>
<td>20% (-8 pts)</td>
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<td>We don’t have time to allocate to meeting possible partners</td>
<td>19% (-3 pts)</td>
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<tr>
<td>The company is bigger than ours</td>
<td>11% (-7 pts)</td>
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</tr>
</tbody>
</table>
GE Global Innovation Barometer 2013 Results – Focus Germany