

CIDE – NET

CREATIVE AND INNOVATION DRIVEN ENTERPRISES' NETWORK



Work Package 3:

“Innovation Needs and Potentials”

Synthesis Report:

Albania, Bulgaria, Cyprus, FYROM and Greece

April 2018

Table of Contents

Preface	5
Executive Summary.....	6
Permbledhje Ekzekutive	11
Кратка содржина	16
Резюме на проекта CIDE NET Мрежа на предприятията, ориантирани към творчество и иновации	21
Επιτελική Σύνοψη	27
Part One: The Ecosystem for Innovating Enterprises in Partner Countries	32
ALBANIA.....	33
BULGARIA	34
CYPRUS	35
FYROM.....	36
GREECE	37
Part Two: Enterprises’ Innovation Activities – Determinants, Performance and Prospects.....	42
2.1 Introductory Remarks: Structure of Synthesis Report’s Part Two and Partner Countries Surveys’ Scope	42
2.2 Enterprises’ General Approach to Creativity and Innovation	45
2.3 Types of Innovation and Perceived Conditioning Factors.....	46
2.4 Enterprises’ Innovation: The “Skills Factor”	49
2.5 Enterprises’ Innovation: Prospects for Skills Upgrading Initiatives.....	51
2.6 Interpreting the Survey Findings in the Partner Countries – Stakeholders’ Views	54
2.7 Recommendations for Enterprises’ Innovation Supporting Initiatives	56
ANNEXES	58
ANNEX A - EXECUTIVE SUMMARIES OF PARTNER COUNTRIES’ NATIONAL REPORTS	59
ALBANIA.....	59
BULGARIA	67
CYPRUS	73
FYROM.....	77
GREECE	83
ANNEX B1 - SURVEYS RESULTS.....	92

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ANNEX B2 - “Skill Gaps and Training Needs” – Survey Results	98
ANNEX C - SURVEY’S QUESTIONNAIRE.....	101

Preface

“Creative and Innovation Driven Enterprises’ Network - CIDE NET” Project’s Work Package 3 “Innovation Needs and Potentials” foresees the delivery of a series of 5 **National Reports**, one for each partner country, plus a **Synthesis Report**. The National Reports have been prepared and delivered by the project partner organisations from each country, while the Report in hand, constitutes their **Synthesis**.

Hellenic Management Association, Project Leader and Coordinator would like to acknowledge the contribution of Professor Joseph Hassid to the preparation of this Report. Needless to say, the contribution of project partners and numerous stakeholder organisations’ representative in participating countries is also acknowledged.

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Hellenic Management Association – HMA
April 2018

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Executive Summary

CIDE NET is a European Commission co-funded transnational project, jointly developed by partners in five countries: Greece (Coordinator), Albania, Bulgaria, Cyprus and FYROM.

The Project’s Work Package 3: *“Innovation Needs and Potentials”*, foresees the delivery, for all partner countries, of: “Reviews of Entrepreneurship Ecosystems in partner countries and Needs Analyses” and accompanying National Reports. The present Synthesis Report concludes the series of WP3 deliverables.

All Reports delivered consists of two Parts: *“Part One – The Ecosystem for Enterprises’ Innovation”* and *“Part Two – Enterprises’ Innovation Activities – Performance, Skill Gaps and Needs Analyses”*. This Synthesis Report is structured in a similar fashion.

In **Part One** it presents information and commentary on institutional, legal, technical and other aspects of the “environment / ecosystem” in which enterprises in partner countries operate. Information is based on the content of National Reports, which, in turn, has been derived from national or international sources, as well as from the partner’s own previous work and experience. Authors have also contacted a number of Professional Associations and, by interviewing them, obtained views and recommendations worthy to be considered.

The main **key issues** that all partners were requested to consider in Part One of their National Reports, were the following:

- *Is the country’s institutional, legal and business environment supportive of enterprises’ innovation initiatives?*
- *Which are the main “actors” in decision making concerning “Support to enterprises’ innovation” Policies?*
- *Are there specific Laws for this? If there are, have they, in practice, operated as expected? What do enterprises’ representative bodies say on this?*
- *Is sufficient funding for innovation activities available?*
- *Are there specialized institutions / organisations supporting innovating enterprises? Do enterprises make use of their services?*
- *How developed are the links between enterprises and higher education institutions and does this assist enterprises in their innovation initiatives?*

While detailed presentations are included in the respective National Reports, some findings emerging from this “National Innovation Ecosystems’ Assessment” in the

five CIDE NET partner countries considered however to be of more general relevance, are the following:

- (a) Various national and international sources suggest that **enterprises’ innovation activity** in partner countries, is relatively low and there is considerable distance from other European countries. Despite some transitory improvements observed in relatively recent past periods, the overall situation does not show any noticeable change.
- (b) The overall adverse situation in terms of **entrepreneurship development**, is reflected in corresponding low indices of “Opportunity-driven entrepreneurship”
- (c) **Venture capital markets** are relatively underdeveloped and, when combined with limited only innovating enterprises’ funding opportunities through the official banking system, this results in creating serious constraints and obstacles to enterprises’ innovation activity.
- (d) The **educational system** in partner countries (Schools, HEIs, Research institutions) is not considered sufficiently competitive at an international scale and not effectively linked to the needs of enterprises
- (e) **Links** between basic and applied research and between research and the marketplace are regarded as “weak”.
- (f) **Legislation and the Regulatory environment** is regarded as creating “obstacles” to innovation, rather than encouraging and facilitating it.

National Reports (Section 1.3) also present issues discussed during interviews conducted with representatives of organisations regarded as “stakeholders”, on basic elements of the Innovation Ecosystem in the respective countries. The person(s) interviewed in each partner country, provided views on whether they regard the Innovation Ecosystem in their country as being “supporting”, “facilitating” and “appreciative” of enterprises’ innovation activities.

The **Second Part** of this Synthesis Report summarises the findings of the Surveys conducted in all partner countries, using standardized methodology and structure of reporting. The scope of these surveys was to investigate “enterprises’ Innovation Activities”, the “Determinants of Innovation Performance” and future Prospects. National Surveys focused on a limited number of sectors (“focus sectors”), such as: Tourism, Agrofood, Creative industries (clothing design and production) and Commerce – retail and wholesale), but partners were provided flexibility to also consider enterprises in other product or services industries. The total number of enterprises surveyed in the five partner countries is 450, with most of them employing less than 10 persons. Together with the 10-19 employment size bracket, those employing less than 20 persons account for more than 60% of the total sample.

Surveys’ findings, as discussed in this Synthesis Report, reflect the situation in all partner countries taken together and all sectors surveyed. They have obviously been derived from the five partner countries’ National Reports delivered, which should also been consulted for more detailed presentations, at country or sector level.

Survey respondents in each partner country were first requested to indicate the extent of their “agreement”, by marking between 1 (“strongly disagree”) and 5 (“strongly agree”), with a number of statements referring to basic notions of Innovation (**Section 2.2**). With the exception of the statement suggesting that “Innovation is only the responsibility of enterprises’ R&D personnel”, for which the “composite” indicator for all countries taken together is estimated at 2.61/4.00, indicating clear “disagreement”, for all other statements the corresponding values exceed 4.0/5.0. This specific finding is confirmed for all countries and industries. Furthermore, the disagreement expressed for the specific statement mentioned above, confirms the importance that some types of enterprises’ innovation activity for which narrowly defined “scientific” personnel is responsible, should also be seriously considered, especially in countries classified as “modest innovators” and for firms of small or, at best, medium size.

In **Section 2.3**, investigating the extent to which surveyed enterprises engage in specific types of innovative activities, the estimated average indicators for various types of innovation (i.e. products, processes, organizational, marketing), range from maximum 2.84/5.00, in Albania, to minimum 2.47/5.00 in Greece, while for all countries and sectors taken together the average indicator is estimated at 2.66/5.00. For specific types of innovation, the highest value for all countries’ indicator is recorded for “marketing innovation” (2.85/5.00) and the lowest for “products innovation” (2.54/5.00), with “process” and “organizational innovation” in between (2.58 and 2.66/5.00 respectively). These values suggest that, for enterprises in partner countries that participated in the surveys, their engagement in any of the four types of innovation, ranges between “very little” and “moderate”! Detailed findings per country are presented in partner countries’ National Reports and in Annexes B1 and B2 of this Synthesis Report.

Given this indication of rather low engagement in innovative activities, the surveys conducted also investigated “actual” or even “conceived” obstacles/barriers that enterprises are confronted with (also in Section 2.3). “Lack of adequate finance” and “High cost of access to new markets” seem to be major concerns for enterprises, with variations however among partner countries. Other rather severe obstacles are related to competitive pressures of various types (e.g. price, reputation, market dominance etc.) exerted on the sample’s small and medium sized enterprises and to shortages of qualified innovation related personnel. This last type of constraint on

innovative activity seems to be relatively more severe in Albania and Greece (indicators exceeding 4.00/5.00)

In **Section 2.4**, the surveys conducted at national level (with findings reported in corresponding National Reports) investigated the type of skills considered most important for innovation in each partner country and at the 5 partner countries' level. “Indicators of skills' significance” are, on average (i.e. all countries / all industries), 4.20/5.00 implying that all of them are perceived as being close to “very significant”, with marginal only differences among countries (minimum 4.08/5.00 for Bulgaria, maximum 4.31/5.00 for Greece). It is interesting to note that there are similarities among countries on how various types of skills are ranked and, more specifically, which are the most significant ones, independently of sector. The **“Top 5 Skills for Innovation”** for all countries taken together include: (a) “personal skills”, such as “to be able to think and act creatively” or “to be able to identify opportunities”, (b) other skills related to the persons concerned being able to promote innovation within the firm, such as “to be able to communicate” or “to promote the enterprise's innovation culture” or (c) some more technical skills, such as: “innovation cost-benefit analyses” or “to be able to monitor and evaluate the results of innovation”.

In **Section 2.5**, survey respondents were asked to express their preferences on how innovation supporting initiatives could be best organised. The messages derived are clear! Enterprises, despite the fact that their small/medium size may pose constraints on independently initiating innovation related projects, seem to favour schemes combining their own capabilities with those of Business representative organisations, such as Associations, Chambers of Commerce. On the contrary, Public sector institutions' involvement is, generally speaking, not favoured.

Finally, in **Section 2.6**, National Reports and their Synthesis, present recommendations for enterprises' innovation supporting initiatives that, in their authors' view should be considered for their respective countries. It is indicatively mentioned that such initiatives should be based on the realization that, in all partner countries, there is a series of general and specific obstacles and constraints that limit enterprises' innovation activity especially that of small or medium sized ones. Many of these obstacles are not related to the enterprises themselves, but are rather associated with the Administration's (Central Government and its various Agencies) functioning (e.g. inefficiencies, red tape) or with general policy making regarded as not always being “innovators-friendly”!

Furthermore, Innovation supporting initiatives that seem to be favoured by surveyed enterprises, should, generally speaking, be associated with improving the amount

and quality of resources (human, financial, organizational and other), that may be invested in business development initiatives associated with long term improved performance, such as “innovation”. This will be significantly facilitated by initiatives targeting, in a well-balanced way considering relationships and synergies) all the elements of a country’s “innovation ecosystem”.

The issue of “innovation related personnel skills” and, in particular, its observed shortage, emerges as a particularly important issue in all partner countries. It seems that a wide range of horizontal skills need to be further developed, although sector-specific needs must also be considered.

Finally, researchers and CIDE NET partner organisations, could not avoid collecting and assessing enterprises and stakeholder organisations’ views on the benefits that might result from the project’s planned activities, conditional of course on them managing to attract enterprises’ sustained interest and their staff’s participation. The general reaction, expressed both through the surveys and the interviews conducted in all partner countries, is definitely a positive one.

Permbledhje Ekzekutive

CIDE NET është një projekt transnacional i bashkëfinancuar nga Komisioni Evropian, që implementohet bashkërisht nga partnerët në pesë vende: Greqia (Koordinatori), Shqipëria, Bullgaria, Qiproja dhe Maqedonia.

Paketa e Punës së Projektit 3 (WP3): **"Nevojat për Inovacion dhe Potencialet"** parasheh shpërndarjen, për të gjitha vendet partnere, të: "Shqyrtime të Ekosistemeve të Sipërmarrjes në Vendet Partnere dhe Analizat e Nevojave" dhe Raportet Shoqëruese Kombëtare Ky raport sintezë përfundon serinë e rezultateve të WP3.

Të gjitha raportet e dorëzuara përbëhen nga dy pjesë: **"Pjesa e Parë - Inovacioni i Ekosistemit për Ndërmarrjet"** dhe **"Pjesa e dytë - Aktivitetet e Inovacionit të Ndërmarrjeve - Performanca, Mangësitë e Aftësive dhe Analiza e Nevojave"**. Ky raport sintezë është i strukturuar në një mënyrë të ngjashme.

Në Pjesën e Parë ai paraqet informacion dhe komente mbi aspektet institucionale, ligjore, teknike dhe të tjera të "mjedisit / ekosistemit", në të cilin veprojnë ndërmarrjet në vendet partnere. Informacioni bazohet në përmbajtjen e Raporteve Kombëtare, të cilat, nga ana tjetër, janë nxjerrë nga burime kombëtare ose ndërkombëtare, si dhe nga puna dhe përvoja e mëparshme e partnerit. Autorët gjithashtu kanë kontaktuar me një numër Shoqatash Profesionale dhe, duke i intervistuar ata, kanë marrë pikëpamje dhe rekomandime të vlefshme për tu konsideruar.

Çështjet kryesore kyçe që u kerkuan të gjithë partnerët u të marrin në konsideratë në Pjesën e Parë të Raporteve të tyre Kombëtare ishin këto:

- *A është mjedisi institucional, ligjor dhe i biznesit të i vendit mbështetës i iniciativave të inovacionit të ndërmarrjeve?*
- *Cilat janë "aktorët" kryesorë në marrjen e vendimeve në lidhje me politikën e "Përkrahjes e inovacionit të ndërmarrjeve"*
- *A ka ligje të veçanta për këtë? Nëse ka, a kanë funksionuar ata në praktikë siç pritej? Çfarë thonë organet përfaqësuese të ndërmarrjeve për këtë?*
- *A ofrohen fonde të mjaftueshme për aktivitetet e inovacionit?*
- *A ka institucione / organizata të specializuara që mbështesin ndërmarrjet inovative? A shfrytëzojnë ndërmarrjet shërbimet e tyre?*
- *Sa të zhvilluara janë lidhjet ndërmjet ndërmarrjeve dhe institucioneve të arsimit të lartë dhe a ndihmon kjo ndërmarrjet në iniciativat e tyre të inovacionit?*

Ndërsa paraqitjet e detajuara janë përfshirë në Raportet Kombëtare përkatëse, disa gjetje që dalin nga ky vlerësim i "Vlerësimeve të Ekosistemeve Kombëtare të Inovacionit" në pesë vendet partnere të CIDE NET, të cilat konsiderohen të jenë më të rëndësishme së përgjithshme, janë si në vijim:

- (a) Burime të ndryshme kombëtare dhe ndërkombëtare sugjerojnë se **aktiviteti i inovacionit të ndërmarrjeve** në vendet partnere është relativisht i ulët dhe ka distancë të konsiderueshme nga vendet e tjera evropiane. Pavarësisht nga disa përmirësime kalimtare të vërejtura në periudha relativisht të kohëve të fundit, situata e përgjithshme nuk tregon ndonjë ndryshim të dukshëm.
- (b) Situata e përgjithshme negative në aspektin e **zhvillimit të sipërmarrjes**, reflektohet në indekset përkatëse të ulëta të "Sipërmarrjes së orientuar nga mundësia"
- (c) **Tregjet e kapitaleve sipërmarrëse** janë relativisht të pazhvilluara dhe, kur kombinohen me mundësitë e financimit të ndërmarrjeve inovative të kufizuara përmes sistemit zyrtar bankar, kjo rezulton në krijimin e kufizimeve dhe pengesave serioze për aktivitetin e inovacionit të ndërmarrjeve.
- (d) **Sistemi arsimor** në vendet partnere (Shkollat, Institutet e larta arsimore, Institucionet Kërkimore) nuk konsiderohet mjaftueshmërisht konkurrues në shkallë ndërkombëtare dhe nuk lidhet në mënyrë efektive me nevojat e ndërmarrjeve
- (e) **Lidhjet** në mes të kërkimit bazë dhe të aplikuar dhe midis hulumtimit dhe tregut konsiderohen si "të dobëta".
- (f) **Legjislacioni dhe mjedisi rregullator** konsiderohen se krijojnë "pengesa" për inovacionin, në vend që ta inkurajojnë dhe lehtësojnë atë.

Raportet Kombëtare (Seksioni 1.3) gjithashtu paraqesin çështjet e diskutuara gjatë intervistave të kryera me përfaqësuesit e organizatave të konsideruara si "palë të interesuara", mbi elementet bazë të Ekosistemit të Inovacionit në vendet përkatëse. Personat e intervistuar në secilin vend partner, dhane mendimet e tyre nëse ata e konsiderojnë Ekosistemin e Inovacionit në vendin e tyre si "mbështetës", "lehtësues" dhe "çmueshëm" të aktiviteteve të inovacionit të ndërmarrjeve.

Pjesa e Dytë e këtij Raporti përmbledh gjetjet e Sondazheve të kryera në të gjitha vendet partnere, duke përdorur metodologjinë e standardizuar dhe strukturën e raportimit. Qëllimi i këtyre sondazheve ishte të hetonte "Aktivitetet e Inovacionit të Ndërmarrjeve", "Përcaktuesit e Performancës së Inovacionit" dhe Perspektivat e ardhshme. Sondazhet kombëtare u përqëndruan në një numër të kufizuar sektorësh ("sektorët e fokusit"), siç janë: Turizmi, Agro ushqimi, industritë krijuese (dizajni dhe prodhimi i veshjeve) dhe tregtia - shitja me pakicë dhe shitja me shumicë, por partnerëve u sigurohet fleksibilitet për të konsideruar gjithashtu ndërmarrjet në sektorët tjerë produkteve ose shërbimeve. Numri i përgjithshëm i ndërmarrjeve të

anketuara në pesë vendet partnere është 450, ku shumica e tyre punësojnë më pak se 10 persona. Së bashku me grupin me të punësuar 10-19, ata që punësojnë më pak se 20 persona përbëjnë më shumë se 60% të krahasimit total.

Rezultatet e anketimeve, siç është diskutuar në këtë Raport përmbledhës, pasqyrojnë situatën në të gjitha vendet partnere të marra së bashku dhe të gjithë sektorët e anketuar. Ato janë bërë qartë nga raportet kombëtare të pesë vendeve partnere, të cilat duhet të konsultohen për prezantime më të hollësishme, në nivel vendi apo sektori.

Të anketuarve në secilën vend partnerë fillimisht iu kërkua që të tregojnë shkallën e "marrëveshjes" së tyre, duke shënuar midis 1 ("nuk pajtohem fuqimisht") dhe 5 ("pajtohem fuqimisht"), me një numër deklaratash që i referohen nocioneve bazë të Inovacionit Seksioni 2.2). Me përjashtim të deklaratës që sugjeron që "Inovacioni është vetëm përgjegjësi e personelit që merret me kërkime në ndërmarrje", për të cilin treguesi "i përbërë" për të gjitha vendet e marra së bashku vlerësohet në 2.61 / 4.00, duke treguar qartazi "mosmarrëveshje", për të gjitha deklaratat e tjera vlerat përkatëse tejkalojnë 4.0 / 5.0. Kjo gjetje specifike është konfirmuar për të gjitha vendet dhe industritë. Për më tepër, mosmarrëveshja e shprehur për deklaratën specifike të përmendur më lart, konfirmon rëndësinë që disa lloje të aktivitetit të inovacionit të ndërmarrjeve për të cilat është përgjegjës personeli "shkencor" i përcaktuar ngushtë, gjithashtu duhet të merret seriozisht në konsideratë, veçanërisht në vendet e klasifikuara si "inovatore modeste" dhe për firmat e vogla ose, dhe për më tepër, ato të mesme.

Në Seksionin 2.3, duke hetuar shkallën në të cilën ndërmarrjet e anketuara angazhohen në lloje të veçanta të aktiviteteve inovative, treguesit mesatarë të vlerësuar për lloje të ndryshme të inovacionit (p.sh. produktet, proceset, organizimi, marketingu) shkojnë nga maksimumi 2.84 / 5.00 në Shqipëri, minimum 2.47 / 5.00 në Greqi, ndërsa për të gjitha vendet dhe sektorët e marrë së bashku treguesi mesatar vlerësohet në 2.66 / 5.00.

Për llojet e veçanta të inovacionit, vlera më e lartë për treguesit e të gjitha vendeve regjistrohet për "inovacionin e marketingut" (2.85 / 5.00) dhe më i ulët për "inovacionin e produkteve" (2.54 / 5.00), me "proces" dhe "midis" (2.58 dhe 2.66 / 5.00 respektivisht). Këto vlera sugjerojnë se, për ndërmarrjet në vendet partnere që morën pjesë në sondazhet, angazhimi i tyre në cilëndo prej katër llojeve të inovacionit, varion midis "shumë pak" dhe "të moderuar"! Gjetjet e hollësishme për çdo vend janë paraqitur në Raportet Kombëtare të vendeve partnere dhe në Aneksat B1 dhe B2 të këtij Raporti të Përmbledhjes.

Duke pasur parasysh këtë indikacion të një angazhimi mjaft të ulët në aktivitetet inovative, anketat e kryera po ashtu hetonin pengesat / pengesat "aktuale" apo edhe "të konceptuara" me të cilat ballafaqohen ndërmarrjet (gjithashtu në Seksionin 2.3). "Mungesa e financimit adekuat" dhe "Kosto e lartë e qasjes në tregje të reja" duket që janë shqetësime të mëdha për ndërmarrjet, megjithëse janë të ndryshme ndërmjet vendeve partnere. Pengesa të tjera janë të lidhura me presionet konkurruese të tipeve të ndryshme (p.sh. çmimi, reputacioni, dominimi i tregut etj.) të shfaqura në ndërmarrjet e vogla dhe të mesme dhe në mungesat e personelit të kualifikuar lidhur me inovacionin. KY lloj i fundit i kufizimit të aktivitetit inovativ duket të jetë relativisht më i ashpër në Shqipëri dhe Greqi (tregues që tejkalojnë 4.00 / 5.00).

Në Seksionin 2.4, sondazhet e kryera në nivel kombëtar (me gjetjet e raportuara në Raportet Kombëtare përkatëse) kanë hulumtuar llojin e aftësive që konsiderohen më të rëndësishme për inovacionin në secilin vend partner dhe në nivelin e 5 vendeve partnere. "Treguesit e rëndësisë së aftësive" janë mesatarisht (dmth. Të gjitha vendet / të gjitha industritë), 4.20 / 5.00 duke nënkuptuar se të gjitha ato perceptohen si të afërta me "shumë rëndësi", me diferenca marginale vetëm mes vendeve (minimum 4.08 / 5.00 për Bullgarinë, maksimumi 4.31 / 5.00 për Greqinë). Është interesante të theksohet se ekzistojnë ngjashmëritë midis vendeve se si klasifikohen llojet e ndryshme të aftësive dhe, më konkretisht, cilat janë ato më të rëndësishme, pavarësisht nga sektori. "Aftësitë më të mira për inovacionin" për të gjitha vendet e marra së bashku përfshijnë: (a) "aftësi personale", të tilla si "të jenë në gjendje të mendojnë dhe të veprojnë në mënyrë kreative" ose "të jenë në gjendje të identifikojnë mundësitë"; lidhur me personat e interesuar që janë në gjendje të promovojnë inovacionin brenda firmës, të tilla si "të jenë në gjendje të komunikojnë" ose "të promovojnë kulturën e inovacionit të ndërmarrjes" ose (c) disa aftësi më teknike, të tilla si: "Ose" të jenë në gjendje të monitorojnë dhe vlerësojnë rezultatet e inovacionit".

Në Seksionin 2.5, të anketuarve u pyetën për të shprehur preferencat e tyre se si iniciativat mbështetëse të inovacionit mund të organizohen më mirë. Mesazhet e nxjerra janë të qarta! Ndërmarrjet, përkundër faktit se madhësia e tyre e vogël / e mesme mund të përbëjë kufizime për iniciimin e projekteve të lidhura me inovacionin, duket se favorizojnë skemat që kombinojnë aftësitë e tyre me ato të organizatave përfaqësuese të biznesit, siç janë Asociacionet, Dhomat e Tregtisë. Përkundrazi, përfshirja e institucioneve të sektorit publik në përgjithësi nuk është favorizuar.

Së fundi, në Seksionin 2.6, Raportet Kombëtare dhe Sinteza e tyre, paraqesin rekomandime për iniciativat mbështetëse të inovacionit të ndërmarrjeve që, sipas

mendimit të tyre, duhet të merren parasysh për vendet e tyre përkatëse. Është përmendur në mënyrë indikative se iniciativa të tilla duhet të bazohen në realizimin se në të gjitha vendet partnere ekzistojnë një sërë pengesash dhe kufizimesh të përgjithshme dhe specifike që kufizojnë aktivitetin e inovacionit të ndërmarrjeve, veçanërisht ato të vogla dhe të mesme. Shumë prej këtyre pengesave nuk janë të lidhura me vetë ndërmarrjet, por janë të lidhura me funksionimin e administratës (qeveria qendrore dhe agjencitë e saj të ndryshme) (p.sh. mungesa e efikasitetit, burokracisë) ose me bërjen e politikave të përgjithshme që konsiderohen si jo gjithmonë "miqësore për novatorët"!

Për më tepër, iniciativat mbështetëse për inovacionin që duket se favorizohen nga ndërmarrjet e anketuara, përgjithësisht duhet të shoqërohen me përmirësimin e sasisë dhe cilësisë së burimeve (njerëzore, financiare, organizative dhe të tjera) që mund të investohen në iniciativat e zhvillimit të biznesit të lidhura me një kohë të gjatë afatgjatë të përmirësuar, siç është "risia". Kjo do të lehtësohet ndjeshëm nga iniciativat që synojnë, në një mënyrë të balancuar duke marrë parasysh marrëdhëniet dhe sinergjitë) të gjitha elementet e "ekosistemit të inovacionit" të një vendi.

Çështja e "aftësive të inovacionit lidhur me personelin" dhe, në veçanti, mungesa e vërejtur e saj, Del si një çështje veçanërisht e rëndësishme në të gjitha vendet partnere. Duket se një gamë e gjerë aftësish horizontale duhet të zhvillohen më tej, ndonëse nevojat specifike të sektorit duhet të merren gjithashtu parasysh.

Së fundmi, hulumtuesit dhe organizatat partnere të CIDE NET nuk mund të shmangin grumbullimin dhe vlerësimin e ndërmarrjeve dhe të pikëpamjeve të organizatave të interesit mbi përfitimet që mund të rezultojnë nga aktivitetet e planifikuara të projektit, me kusht që ata të menaxhojnë për të tërhequr interesin e qëndrueshëm të ndërmarrjeve dhe pjesëmarrjen e stafit të tyre. Reagimi i përgjithshëm, i shprehur si përmes sondazheve dhe intervistave të kryera në të gjitha vendet partnere, është padyshim pozitiv.

Кратка содржина

CIDE NET е интернационален проект ко-финансиран од Европската Комисија, заеднички развиен од партнери од 5 земји: Грција (проектниот координатор), Албанија, Бугарија, Кипар и Македонија.

Работниот пакет 3 на проектот **“Иновациски потреби и потенцијали”**, го предвидува исходот, во сите партнерски земји, на : **“Осврти на претприемачки екосистеми во земјите партнери и анализи на потребите”** и национални извештаи. Подолу претставениот извештај ги заклучува испораките од РПЗ.

Сите приложени извештаи се содржат од два дела: **“Прв дел – Екосистемот за иновации на претпријатијата”** и **“Втор дел – Иновациски активности на претпријатијата – Перформанси, јаз во вештините и анализа на потребите”**. Овој извештај е структуриран во истиот концепт.

Во **првиот дел** се претставени информации и коментари на институционален, легален, технички и други аспекти на **“средината/екосистемот”** во кој претпријатијата во земјите-партнери функционираат. Информациите се базираат на содржината на Националните Извештаи, кои пак, се произлезени од национални и интернационални извори, како и од претходното работно искуство на партнерите. Авторите, исто така, остварија контакт со Професионални асоцијации и, со интервјуирање на истите, произлегоа погледи и препораки кои треба да се земат предвид.

Главните **клучни проблематики** кои им беа наложени на партнерите да ги земат предвид во Прв дел од нивните Национални извештаи, се следните:

- **Дали институционалната, легалната и бизнис средината во државата подржува иновативни иницијативи на претпријатијата?**
- **Кои се главните “актери” во донесувањето одлуки во поглед на политиките за “Поддршка на иновациите на претпријатијата”**
- **Дали има специфични закони за сето ова? Ако има, дали тие во пракса се имплементираат како што се очекува? Што репрезентативните тела на претпријатијата мислат за ова?**
- **Дали се соодветно финансирани разни иновациски активности?**
- **Дали има специјализирани институции/организации кои што поддржуваат иновативни претпријатија? Дали претпријатијата имаат бенефиции од нивните услуги?**
- **Колку се развиени врските меѓу претпријатијата и институциите за високо образование и дали овој вид на соработка им помага на претпријатијата во нивните иновациски активности?**

Додека, детална презентација е вклучена во Националните Извештаи, некои наоди кои произлегоа од оваа “Проценка на националните иновативни екосистеми” во сите CIDE NET земји-партнери се со општа важност, а тоа се следните:

(a) Различни национални и интернационални извори сугерираат дека **иновациските активности во претпријатијата** во земјите-партнери, се релативно на ниско ниво и дека има голема разлика од Европските земји. И покрај некои преодни подобрувања забележани во релативно блиските минати периоди, целокупната ситуација не покажува забележителни промени.

(b) Свкупната неповолна ситуација во однос на **развојот на претприемништвото**, се рефлектира во соодветните ниски индекси на "претприемништвото што се ориентира на можности"

(c) **Ризичните пазари на капитал** се релативно неразвиени и, кога се комбинирани со ограничените можности за финансирање на единствени иновативни претпријатија преку официјалниот банкарски систем, ова резултира со создавање сериозни ограничувања и пречки за иновативната дејност на претпријатијата.

(d) **Образовниот систем** во земјите-партнери (Училишта, високи образовни институции, институции за истражување) се смета како недоволно компетентен на интернационално ниво и неефективно искоординиран со потребите на претпријатијата.

(e) **Врските** меѓу основните и применети истражувања како и меѓу истражувањата и пазарот се сметаат за “слаби”

(f) **Легислатива и регулативата** се сметаат за главни “пречки” за иновациите, наместо како стимулации и олеснувања

Националниот извештај (секција 1.3) исто така ги презентира темите дискутирани за време на интервјуата имплементирани од претставници на организациите кои се сметаат за “стејкхолдери”, како дел од основните елементи на Иновативниот Екосистем во земјите кои учествуваат. Поединците кои беа интервјуирани во секоја држава, принесоа погледи во однос на тоа дали Иновацискиот Екосистем во нивната држава се смета за “подршка”, “олеснување” и “полн со разбирање” за иновативните активности на претпријатијата.

Вториот дел на овој извештај ги сумира резултатите од анкетата спроведена во сите земји-партнери, користејќи стандардизирана методологија и структура на извештаите. Опсегот на овие истражувања беше да се испитаат "Иновативните активности на претпријатијата", "Детерминантите на перформансите за иновациите" и идните гледишта. Националните анкети се фокусираа на

ограничен број сектори ("фокус сектори"), како што се: Туризам, Агрохрана, Креативни индустрии (дизајн и производство на облека) и Трговија - малопродажба и трговија на големо), но на партнерите им беше дадена флексибилност за да се разгледаат и претпријатијата во други производи или услуги индустрии. Вкупниот број на претпријатија анкетирани во петте земји-партнери е 450, при што повеќето од нив вработуваат помалку од 10 лица. Заедно со опсегот од 10 до 19 вработени, оние кои вработуваат помалку од 20 лица учествуваат со повеќе од 60% од вкупниот примерок.

Наодите на анкетите, како што е дискутирано во овој Синтезиски извештај, ја рефлектираат ситуацијата во сите земји-партнери земени заедно и сите сектори кои се испитуваат. Тие се добиени од доставените национални извештаи од петте земји-партнери, кои исто така треба да бидат консултирани за подетални презентации, на ниво на земјата или на ниво на сектор.

Од испитаниците во секоја од земјите-партнери за прв пат се бараше да го наведат степенот на нивната "согласност", со обележување помеѓу 1 ("силно не се согласуваат") и 5 ("силно се согласуваат"), со неколку изјави кои се однесуваат на основните поими за иновации (**Дел 2.2**). Со исклучок на изјавата која сугерира дека "Иновацијата е само одговорност на персоналот за истражување и развој на претпријатијата", за што индикаторот за "согласност" за сите земји земени заедно се проценува на 2,61 / 4,00, што укажува на јасно "несогласување" за сите други изјави соодветните вредности надминуваат 4.0 / 5.0. Овој специфичен наод е потврден за сите земји и индустрии. Исто така, несогласувањето изразено за конкретната изјава спомената погоре ја потврдува важноста на иновативните активности на некои видови на претпријатија за која е одговорен тесно дефиниран "научен" персонал, исто така треба сериозно да се разгледа, особено во земјите класифицирани како "скромни иноватори" и за фирми од мали или, во најдобар случај, со средна големина.

Во **делот 2.3**, во кој се истражува степенот до кој анкетираниите претпријатија се инволвирани во одредени видови на иновативни активности, проценетите просечни показатели за различни видови на иновации (т.е. производи, процеси, организација и маркетинг) се движат од максимум 2.84 / 5.00 во Албанија до минимум 2.47 / 5.00 во Грција, додека за сите земји и сектори земени заедно, просечниот индикатор се проценува на 2.66 / 5.00.

За специфични видови на иновации, највисоката вредност за индикаторот на сите земји е забележана за "маркетинг иновации" (2,85 / 5,00) и најниска за "иновации на производите" (2,54 / 5,00), со "процесните" и "организациски иновации" со вредност помеѓу (2,58 и 2,66 / 5,00 соодветно). Овие вредности укажуваат на тоа дека за претпријатијата во земјите-партнери кои учествувале

во анкетите, нивната инволвираност во било кој од четирите видови на иновации се движи помеѓу "многу малку" и "умерено"! Деталните наоди по земја се презентирани во националните извештаи на земјите-партнери и во Анексите Б1 и Б2 од овој Синтетички извештај.

Имајќи го предвид овој показател за прилично низок ангажман во иновативни активности, спроведените истражувања исто така ги испитуваа "вистинските" или дури "замислените" пречки / бариери со кои се соочуваат претпријатијата (исто така во Дел 2.3). "Недостатокот на соодветни финансии" и "Високите трошоци за пристап до нови пазари" се чини дека се главна грижа за претпријатијата, но со варијации меѓу земјите-партнери. Други прилично тешки пречки се поврзани со конкурентните притисоци од различни видови (на пример, цената, угледот, доминацијата на пазарот итн.) Кои се применуваат на малите и средни претпријатија на примерокот и на недостаток на квалификуван кадар за иновации. Овој последен вид ограничување на иновативната активност се чини дека е релативно потежок во Албанија и Грција (индикатори над 4,00 / 5,00).

Во Дел 2.4, анкетите спроведени на национално ниво (со наоди објавени во соодветните национални извештаи) ги испитуваа видовите вештини кои се сметаат за најважни за иновациите во секоја од земјите партнери и на ниво на петте земји-партнери. "Показателите за значењето на вештините" се просечни (т.е. сите земји / сите индустрии), 4.20 / 5.00, што имплицира дека сите од нив се сметаат за блиски до "многу значајни", со маргинални само разлики меѓу земјите (минимум 4.08 / 5.00 за Бугарија, максимум 4.31 / 5.00 за Грција). Интересно е да се напомене дека постојат сличности меѓу земјите за тоа како различни видови на вештини се рангираат и, поточно, кои се најзначајните, независно од секторот. **"Топ 5 вештини за иновации"** за сите земји земени заедно вклучуваат: (а) "лични вештини", како на пример "за да можат да размислуваат и да дејствуваат креативно" или "да можат да ги идентификуваат можностите", (б) други вештини поврзани со засегнатите лица да можат да промовираат иновации во рамките на фирмата, како што се "да се комуницира" или "да се промовира иновационската култура на претпријатието" или (в) некои технички вештини, како што се: "анализи за трошоци и придобивки за иновации" или "Или" да бидат способни да ги следат и оценуваат резултатите од иновацијата ".

Во **делот 2.5**, испитаниците од анкетата беа замолени да ги изразат своите преференции за тоа како иницијативите за поддршка на иновациите би можеле најдобро да се организираат. Изнесените пораки се јасни! Претпријатијата, и покрај фактот што нивната мала / средна големина може да претставува ограничувања за независно иницирање проекти поврзани со иновации, се чини

дека се во корист на шеми кои ги комбинираат сопствените способности со оние на претставничките организации на бизнисот, како што се Асоцијации, Стопански комори. Напротив, вклученоста на институциите во јавниот сектор, генерално, не е фаворизирана.

Конечно, во **Дел 2.6**, Национални извештаи и нивните сумирања, презентираат препораки за иницијативите за поддршка на иновациите на претпријатијата кои според мислењето на нивните автори треба да се земат предвид за нивните земји. Индикативно е споменато дека ваквите иницијативи треба да се засноваат на сознанието дека во сите земји-партнери постои серија на општи и специфични пречки и ограничувања кои ја ограничуваат иновациската активност на претпријатијата, особено оние на мали или средни. Многу од овие пречки не се поврзани со самите претпријатија, туку се прилично поврзани со функционирањето на администрацијата (централната власт и нејзините различни агенции) (на пример, неефикасноста, бирократијата) или со генералното креирање на политики што не се секогаш "пријателски иноватори".

Понатаму, иницијативите за поддршка на иновациите кои се претпочитаат од анкетираниите претпријатија, генерално треба да бидат поврзани со подобрување на износот и квалитетот на ресурсите (човечки, финансиски, организациски и други), кои можат да бидат инвестирани во иницијативи за развој на бизнисот поврзани со долгорочни подобрени перформанси, како што се "иновации". Ова ќе биде значително олеснето со насочување на иницијативи, на добро избалансиран начин со оглед на односите и синергиите) кон сите елементи на "иновативниот екосистем" на земјата.

Прашањето за "персоналните вештини поврзани со иновациите", а особено забележаниот недостиг, се јавува како особено важно прашање во сите земји-партнери. Се чини дека треба да се развие широк спектар на хоризонтални вештини, иако треба да се разгледаат потребите специфични за секторот.

Конечно, истражувачите и партнерските организации на CIDE NET не можеа да избегнуваат собирање и оценување на ставовите на организациите и заинтересираните страни за придобивките кои можат да произлезат од планираните активности на проектот, условно, се разбира, да успеат да привлечат постојан интерес на претпријатијата и учеството на нивниот персонал. Општата реакција, изразена преку анкетите и интервјуата спроведени во сите партнерски земји, дефинитивно е позитивна.

**Резюме на проекта CIDE NET Мрежа на предприятията,
ориантирани към творчество и иновации**

CIDE NET е транснационален проект, съфинансиран от Европейската комисия, съвместно разработен от партньори в пет страни: Гърция (координатор), Албания, България, Кипър и БЮРМ.

Работният пакет 3 на проекта, озаглавен „Потребности и потенциал за иновации“ предвижда предоставянето за всички страни партньори на: „Прегледи на екосистемите за предприемачество в страните партньори и анализи на нуждите“ и придружаващите ги национални доклади. Настоящият обобщаващ доклад приключва серията от резултати от Работният пакет 3.

Всички предоставени Доклади се състоят от две части: **„Част първа - Екосистема за иновации на предприятията“** и **„Част втора - Иновационни дейности на предприятията - ефективност, липса на умения и анализ на нуждите“**. Този обобщаващ доклад е структуриран по подобен начин.

В **първата част** той представя информация и коментари за институционалните, правните, техническите и други аспекти на „околната среда / екосистемата“, в които функционират предприятията в страните партньори. Информацията се базира на съдържанието на националните доклади, които от своя страна са получени от национални или международни източници, както и от предишната работа и опит на партньора. Авторите са се свързали и с редица професионални асоциации и посредством серия от интервюта са получили мнения и препоръки, които заслужават да бъдат взети под внимание.

Основните ключови въпроси, които партньорите бяха помолени да разгледат в първата част на националните доклади, бяха следните:

- **Институционалната, правната и бизнес среда на страната подкрепя ли иновационните инициативи на предприятията?**
- **Кои са основните „участници“ в процеса на вземане на решения относно политиките за подкрепа на иновациите в предприятията?**
- **Има ли специфични закони за това? Ако има, на практика те функционират ли според очакванията? Какво отношение заемат представителните органи на предприятията по този въпрос?**
- **Налице ли е достатъчно финансиране за иновационни дейности?**
- **Има ли специализирани институции / организации, подкрепящи иновативни предприятия? Предприятията използват ли услугите им?**

- **Как са развити връзките между предприятията и висшите учебни заведения и това подпомага ли предприятията в техните иновационни инициативи?**

Макар че подробни прегледи са включени в съответните национални доклади, някои по-обща констатации, възникващи на базата на тази „оценка на националните иновационни екосистеми“ в петте страни партньори на CIDE NET могат да бъдат обобщени по следният начин:

- а) Различни национални и международни източници показват, че **иновационната дейност на предприятията** в страните партньори е относително ниска и има значителна разлика в сравнение с други европейски страни. Въпреки някои временни подобрения, наблюдавани в сравнително близкото минало, цялостната ситуация не показва забележима промяна.
- б) Общата неблагоприятна ситуация по отношение на **развитието на предприемачеството** се отразява в съответните ниски индекси на „Предприемачество, базирано на нови възможности“
- в) **Пазарите за рисков капитал** са сравнително слабо развити и когато се комбинират само с ограничени възможности за финансиране на иновативни предприятия чрез официалната банкова система, това води до създаване на сериозни ограничения и пречки пред иновационната дейност на предприятията.
- г) **Образователната система** в страните партньори (училища, висши учебни заведения, изследователски институции) не се счита за достатъчно конкурентна в международен мащаб и не е ефективно свързана с потребностите на предприятията.
- д) **Връзките** между основното и приложното изследване от една страна и между научните изследвания и пазара от друга се считат за „слаби“.
- е) **Законодателството и регулаторната среда** се окачествяват като създаващи „пречки“ за иновациите, вместо да ги насърчават и улесняват.

Националните доклади (раздел 1.3) също представят въпроси, дискутирани по време на интервютата, проведени с представители на организации, разглеждани като „заинтересовани страни“, относно основните елементи на Иновационната екосистема в съответните страни. Лицата, интервюирани във всяка партньорска държава, представиха становище дали считат Иновационната екосистема в своята страна за „подпомагаща“, „улесняваща“ и „оценяваща“ иновационните дейности на предприятията.

Втората част на този доклад обобщава констатациите от проучванията, проведени във всички страни партньори, като използва стандартизирана

методология и структура на отчитането. Обхватът на тези проучвания бе да се изследват „Иновационните дейности на предприятията“, „Определящите фактори на иновационната ефективност“ и бъдещите перспективи. Националните проучвания са съсредоточени върху ограничен брой сектори („фокус сектори“), като например: туризъм, хранително-вкусова промишленост, творческа индустрия (дизайн и производство на облекло) и търговията - търговия на дребно и едро; продукти или услуги. Общият брой на анкетираните предприятия в петте страни партньори е 450, като в повечето от тях работят по-малко от 10 души. Заедно с предприятията, наемащи персонал между 10 и 19 души, предприятията, работещи с по-малко от 20 души съставляват повече от 60% от общата извадка.

Изводите от проучванията, обсъждани в настоящия обобщаващ доклад, отразяват положението във всички държави партньори, взети заедно и всички изследвани сектори. Очевидно те са получени от представените национални доклади на пет партньорски държави, които също трябва да бъдат консултирани за по-подробен преглед на национално или секторно равнище.

Първоначално анкетираните от всяка страна-партньор бяха помолени да посочат степента на своето „съгласие“, като отбелязват между 1 („силно несъгласие“) и 5 („силно съгласни“) с редица изявления, отнасящи се до основните понятия за иновации (Раздел 2.2). С изключение на твърдението, че „иновациите са отговорност само на персонала на предприятията в областта на научноизследователската и развойната дейност“, за които „общият“ показател за всички страни, взети заедно, се оценява на 2,61 / 4,00, и показва ясно „несъгласие“, за всички останали твърдения съответните стойности надвишават 4.0 / 5.0. Тази конкретна констатация е потвърдена за всички страни и индустрии. Освен това несъгласието, изразено за конкретното изявление, споменато по-горе, потвърждава значението, че иновативните дейности на определени видове предприятия, за които е отговорен тясно дефиниран „научен“ персонал, също следва да бъдат сериозно разгледани, особено в страни, класифицирани като „скромни новатори“ за фирми с малък или среден размер.

В **Раздел 2.3**, разглеждащ доколко анкетираните предприятия се занимават със специфични видове иновационни дейности, прогнозните средни показатели за различните видове иновации (т.е. продукти, процеси, организация, маркетинг) варират от максимум 2,84 / 5,00 в Албания до минимум 2,47 / 5,00 в Гърция, докато за всички държави и сектори, взети заедно, средният показател се оценява на 2,66 / 5,00. За специфични видове иновации най-високата стойност за всички страни е показател за „маркетингова иновация“ (2.85 / 5.00), а най-

ниската за „иновации на продуктите“ (2.54 / 5.00), с „процес“ и „организационна иновация“ между (съответно 2.58 и 2.66 / 5.00). Тези стойности предполагат, че за предприятията в страните партньори, участвали в изследванията, нивото на ангажираност с някоя от четирите вида иновации варира между „много малко“ и „умерено“! Подробни констатации за всяка страна са представени в националните доклади на страните партньори и в приложения Б1 и Б2 на този обобщаващ доклад.

Като се има предвид тази индикация за по-скоро ниска ангажираност с иновативни дейности, проведените проучвания също изследват „действителни“ или дори „възприемани“ пречки / бариери, с които се сблъскват предприятията (също в раздел 2.3). „Липсата на адекватно финансиране“ и „Високите разходи за достъп до нови пазари“ изглежда поражда най-голяма загриженост за предприятията, като между отделните страните партньори съществуват известни различия. Другите относително сериозни пречки са свързани с конкурентен натиск от най-различен вид (например цена, репутация, господстващо положение на пазара и т.н.), упражняван върху малките и средните предприятия и недостига на персонал, притежаващ квалификации, насочени към иновации. Този последен тип ограничения върху иновационната дейност изглежда относително по-сериозен в Албания и Гърция (показатели над 4,00 / 5,00).

В **Раздел 2.4** проучванията, проведени на национално равнище (с констатации, докладвани в съответните национални доклади), изследваха видовете умения, считани за най-важни за иновациите във всяка партньорска държава и на ниво 5-те страни партньори. „Индикаторите за значимостта на уменията“ са средно (т.е. всички страни / всички отрасли), 4,20 / 5,00, което предполага, че всички те се възприемат като близки до „много значими“, с минимални разлики сред страните (минимум 4,08 / за България, максимум 4,31 / 5,00 за Гърция). Интересно е да се отбележи, че между държавите съществуват прилики по отношение на това как се класират различните видове умения и по-конкретно кои са най-значимите, независимо от сектора. „Топ 5 умения за иновации“ за всички страни, взети заедно, включват: а) „лични умения“ като „да мислиш и да действаш креативно“ или „да можеш да идентифицираш възможности“, б) други качества като например умения да могат да насърчават иновациите в рамките на фирмата, „да могат да комуникират“ или „да рекламират иновационната култура на предприятието“ или в) някои по-технически умения като: „анализи на разходите и ползите за иновациите“ или „да може да наблюдава и оценява резултатите от иновациите“.

В **Раздел 2.5** анкетираните бяха помолени да изразят предпочитанията си за това как инициативите за подпомагане на иновациите да бъдат най-добре организирани. Получените послания са ясни! Предприятията, независимо от факта, че техният малък / среден размер може да създаде ограничения за самостоятелно инициране на проекти, свързани с иновациите, изглежда предпочитат програми, които съчетават техните собствени възможности с тези на представителните организации на бизнеса, като например асоциациите и търговските камари. От друга страна, участието на институциите от публичния сектор като цяло не е предпочитано.

Накрая, в **Раздел 2.6** „Национални доклади и техния синтез“, се представят препоръки на предприятията в подкрепа на инициативи, които според авторите трябва да бъдат разгледани за съответните страни. Показателно е, че такива инициативи трябва да се основават на разбирането, че във всички страни-партньори съществуват редица общи и специфични пречки и ограничения, които ограничават иновационната дейност на предприятията, особено тази на малките и средните предприятия. Много от тези пречки не са свързани със самите предприятия, а по-скоро се асоциират с функционирането на администрацията (централното правителство и различните негови агенции) (например неефективност, бюрокрация) или с общата политика, която не се счита винаги за „приятелски настроена към иновациите“.

В допълнение инициативите за подкрепа на иновациите, предпочитани от изследваните предприятия, като цяло трябва да бъдат свързани с подобряването на количеството и качеството на ресурсите (човешки, финансови, организационни и други), които от своя страна биха могли да бъдат инвестирани в инициативи за развитие на бизнеса, като например „иновации“. Това ще бъде значително улеснено от инициативи, насочени към балансиране на взаимовръзките и синергиите по всички елементи на „иновационната екосистема“ на дадена страна.

Проблемът за „личните умения, свързани с иновациите“ и по-специално за наблюдавания недостиг на такива умения, представлява особено важен проблем във всички страни партньори. Има необходимост от последващо развитие на широк спектър от хоризонтални умения, като се имат предвид специфичните за сектора нужди.

Накрая, изследователите и партньорските организации на CIDE NET нямаше как да не съберат и оценят гледните точки на предприятията и организациите на заинтересованите страни относно ползите, които биха могли да произтекат от планираните дейности на проекта, при условие че те успеят да привлекат

интереса на предприятията и подsigурят участието на персонала си. Общата реакция, изразена както в изследванията, така и в интервютата, проведени във всички страни партньори, определено е положителна.

Επιτελική Σύνοψη

Το έργο **CIDE NET** είναι ένα διακρατικό συγχρηματοδοτούμενο έργο της Ευρωπαϊκής Επιτροπής το οποίο υλοποιείται με την συνεργασία πέντε χωρών: Αλβανία, Βουλγαρία, Κύπρος, ΠΓΔΜ και Ελλάδα.

Το Πακέτο Εργασίας 3 του έργου, με θέμα: **«Ανάγκες Καινοτομίας και Δυνατότητες»**, προβλέπει τη σύνταξη και υποβολή Εθνικών Εκθέσεων με αντικείμενο: **«Ανασκόπηση του Οικοσυστήματος για Καινοτομία στις χώρες εταίρους και Ανάλυση Αναγκών»**, για όλες τις χώρες που συμμετέχουν στο έργο. Η παρούσα Συνθετική Έκθεση ολοκληρώνει την σειρά των παραδοτέων του συγκεκριμένου Πακέτου Εργασίας. Όλες οι Εθνικές Εκθέσεις περιλαμβάνουν δύο Μέρη: το **Πρώτο Μέρος** που αφορά **«Το Οικοσύστημα για Καινοτομία Επιχειρήσεων»** και το **Δεύτερο Μέρος** με αντικείμενο **«Δραστηριότητες Καινοτομίας – Επιδόσεις, Κενά δεξιοτήτων και Ανάλυση Αναγκών»**. Η Συνθετική Έκθεση είναι διαρθρωμένη με παρόμοιο τρόπο.

Στο **Πρώτο Μέρος** της η Συνθετική Έκθεση παρουσιάζει πληροφορίες και σχόλια για το θεσμικό, νομικό και τεχνικό «περιβάλλον – οικοσύστημα» στο οποίο λειτουργούν οι επιχειρήσεις στα κράτη-εταίροι. Οι πληροφορίες προέρχονται από Εθνικές και διεθνείς πηγές, καθώς και από προηγούμενες δραστηριότητες και εμπειρίες των εταίρων. Παράλληλα, οι συγγραφείς πραγματοποίησαν επαφές με επαγγελματικές οργανώσεις και, μέσω συνεντεύξεων, αντλήσαν απόψεις και συστάσεις για αριθμό θεμάτων, σχετικών πάντα το αντικείμενο του έργου, τα οποία θεωρούνται ότι είναι σκόπιμο να αποτελέσουν αντικείμενα προσοχής.

Τα **βασικά ερωτήματα** που ζητήθηκε από όλους τους εταίρους να εξετάσουν στο Πρώτο Μέρος των Εθνικών τους Εκθέσεων, ήταν τα εξής:

- *Είναι το θεσμικό, νομικό και οικονομικό περιβάλλον υποβοηθητικό για καινοτομικές πρωτοβουλίες των επιχειρήσεων της χώρας;*
- *Ποιοι είναι οι κύριοι διαμορφωτές αποφάσεων που αφορούν «Υποστήριξη της Καινοτομίας των Επιχειρήσεων»;*
- *Προβλέπεται ειδική νομοθεσία για αυτό; Αν προβλέπεται, λειτουργεί αυτή σύμφωνα με τους στόχους της; Ποια είναι η άποψη των αντιπροσωπευτικών Φορέων των επιχειρήσεων;*
- *Διατίθεται επαρκής χρηματοδότηση για καινοτομικές δραστηριότητες των επιχειρήσεων;*
- *Υπάρχουν εξειδικευμένοι οργανισμοί υποστήριξης των καινοτομικών δραστηριοτήτων των επιχειρήσεων; Αξιοποιούνται οι υπηρεσίες τους από τις επιχειρήσεις;*

- **Πόσο αναπτυγμένη είναι η σύνδεση μεταξύ επιχειρήσεων και Πανεπιστημίων / Ερευνητικών οργανισμών και βοηθά τις επιχειρήσεις στις καινοτομικές τους δραστηριότητες;**

Αναλυτικές παρουσιάσεις των απαντήσεων στα παραπάνω ερωτήματα περιλαμβάνονται βέβαια στις αντίστοιχες Εθνικές Εκθέσεις. Ορισμένα ωστόσο στοιχεία τους, που θεωρούνται γενικότερης σημασίας, είναι τα εξής:

(α) Διάφορες εθνικές και διεθνείς πηγές αναφέρουν ότι η **καινοτομική δραστηριότητα των επιχειρήσεων** στις χώρες που συμμετέχουν στο έργο CIDE NET, είναι σχετικά χαμηλής έντασης και υπάρχει σημαντική απόσταση από άλλες Ευρωπαϊκές χώρες. Παρά το γεγονός ότι, σε κάποια πρόσφατα χρόνια, παρατηρήθηκε πρόοδος, η γενική κατάσταση δεν φαίνεται να εμφανίζει ουσιαστική μεταβολή.

(β) Στις ίδιες αυτές χώρες, η γενικευμένα αρνητική κατάσταση στο θέμα της **Ανάπτυξης Επιχειρηματικότητας** είναι εμφανής και στους χαμηλούς **Δείκτες «Επιχειρηματικότητας Ευκαιρίας»**.

(γ) Ο **Δείκτης «Δαπανών Κεφαλαίων Υψηλού Επιχειρηματικού Κινδύνου»** παραμένει σε χαμηλά επίπεδα και παρουσιάζει πτωτική τάση. Σε συνδυασμό μάλιστα με τις περιορισμένες ευκαιρίες άντλησης χρηματοδότησης μέσω του τραπεζικού συστήματος, αυτό δημιουργεί σοβαρούς περιορισμούς και εμπόδια στην καινοτομική δραστηριότητα.

(δ) Το **Εκπαιδευτικό Σύστημα** (Σχολική και Τριτοβάθμια Εκπαίδευση) δεν θεωρείται επαρκώς ανταγωνιστικό σε διεθνή κλίμακα και απουσιάζει η αποτελεσματική διασύνδεσή του με τις ανάγκες των επιχειρήσεων οι οποίες επιδιώκουν να αναβαθμίσουν και να διατηρήσουν διεθνή ανταγωνιστικότητά.

(ε) Η **διασύνδεση Βασικής με Εφαρμοσμένη έρευνα** και μεταξύ έρευνας και «αγοράς» είναι περιορισμένη.

(στ) Το **Θεσμικό περιβάλλον** θεωρείται ότι μάλλον αποτελεί «εμπόδιο» στην καινοτομική δραστηριότητα, παρά παράγοντα ενθάρρυνσης και διευκόλυνσής της.

Στις **Εθνικές Εκθέσεις**, αλλά και στην **Συνθετική (Ενότητα 1.3)**, παρουσιάζονται τα κύρια σημεία που συζητήθηκαν στη διάρκεια συνεντεύξεων με εκπροσώπους διαφόρων οργανισμών, σχετικά με το Περιβάλλον για Καινοτομία στις αντίστοιχες χώρες-εταίρους. Τα άτομα με τα οποία πραγματοποιήθηκαν οι συνεντεύξεις αυτές, εξέφρασαν απόψεις για το κατά πόσο το «περιβάλλον» αυτό μπορεί να θεωρηθεί ότι υποστηρίζει, διευκολύνει και επιβραβεύει τις καινοτομικές δράσεις των επιχειρήσεων.

Στο **Δεύτερο Μέρος** της Συνθετικής Έκθεσης παρουσιάζονται, συνοπτικά, τα ευρήματα των ειδικών ερευνών που διεξήχθησαν στις 5 χώρες του προγράμματος.

Σκοπός τους ήταν να διερευνηθούν οι καινοτομικές δραστηριότητες ενός αριθμού επιχειρήσεων, οι προσδιοριστικοί παράγοντες των «επιδόσεων τους στην καινοτομία» καθώς και των προοπτικών που διαμορφώνονται. Οι βασικοί, κοινοί για τις περισσότερες χώρες, κλάδοι στους οποίους οι έρευνες επικεντρώθηκαν, είναι ο **Αγροτο-διατροφικός**, ο **Τουρισμός**, οι **Δημιουργικές Βιομηχανίες** και το **Εμπόριο** (Χονδρικό και Λιανικό). Οι εταίροι ωστόσο είχαν ευκαιρίες εξέτασης και άλλων κλάδων παραγωγής προϊόντων ή υπηρεσιών. Συνολικά οι έρευνες που πραγματοποιήθηκαν, με τυποποιημένο για όλες τις χώρες εταίρους Ερωτηματολόγιο, κάλυψαν έναν αριθμό **450** επιχειρήσεων, οι περισσότερες από τις οποίες απασχολούν λιγότερα από 10 άτομα. Αν συνυπολογιστούν και αυτές των 10-19 ατόμων, οι επιχειρήσεις με λιγότερα των 20 ατόμων αποτελούν ποσοστό που υπερβαίνει το 60% του συνολικού δείγματος.

Στους ερωτώμενους δόθηκε καταρχήν η ευκαιρία (**Ενότητα 2.2**) να δηλώσουν (σε κλίμακα βαθμολογίας: 1-4), την «ένταση συμφωνίας» τους με μια σειρά «δηλώσεων» αναφορικά με βασικές έννοιες σχετικών με την Καινοτομία. Με εξαίρεση την «δήλωση» ότι «η Καινοτομία αποτελεί αποκλειστική ευθύνη των στελεχών στα τμήματα έρευνας των επιχειρήσεων», για την οποία ο σταθμισμένος «Δείκτης Βαθμού Συμφωνίας» για το σύνολο των χωρών/επιχειρήσεων/κλάδων, ήταν μόνο 2.61/4.00, που σημαίνει σαφή διαφωνία, για όλες τις άλλες «δηλώσεις» οι αντίστοιχοι Δείκτες υπερέβησαν το 4.0/5.0. Το συγκεκριμένο εύρημα, που επιβεβαιώνεται για όλες τις χώρες και σε επίπεδο επιμέρους κλάδων, σημαίνει ότι καινοτομικές δραστηριότητες στις οποίες εμπλέκονται διοικητικά ή και άλλα στελέχη και τμήματα των επιχειρήσεων, πλην των, με την «στενή έννοια», «επιστημονικών», θα πρέπει και αυτές να λαμβάνονται σοβαρά υπόψιν, ιδίως στις περιπτώσεις χωρών που χαρακτηρίζονται ως «μέτριας καινοτομικότητας» («modest innovators») και για επιχειρήσεις μικρού η, έστω μεσαίου, μεγέθους.

Στην **Ενότητα 2.3**, εξετάστηκε η ένταση με την οποία οι επιχειρήσεις ασχολούνται με συγκεκριμένους τύπους Καινοτομίας. Η μέση ένταση για τους διάφορους αυτούς τύπους (καινοτομία προϊόντος, μεθόδων παραγωγής, οργανωτικές και marketing) κυμαίνεται μεταξύ 2.84/5.00 στην περίπτωση της Αλβανίας και 2.47/5.00 για την Ελλάδα και, κατά μέσον όρο (για όλες τις χώρες και όλους τους κλάδους) , ο σχετικός Δείκτης εκτιμήθηκε στο 2.66/5.00. Προκειμένου για επιμέρους τύπους καινοτομίας, η υψηλότερη τιμή δείκτη, για το σύνολο των χωρών, αφορά την «καινοτομία marketing» (2.85/5.00) και η χαμηλότερη την «καινοτομία προϊόντων» (2.54/5.00), με τις «καινοτομίες μεθόδων παραγωγής» και «οργανωσιακές» στις ενδιάμεσες θέσεις (2.58 και 2.66 αντίστοιχα). Προκύπτει επομένως ότι, για τουλάχιστον τις επιχειρήσεις και τους κλάδους που ερευνήθηκαν στις χώρες-εταίρους, η ενασχόλησή τους, με οποιονδήποτε από τους 4 τύπους Καινοτομίας, είναι μεταξύ του «πολύ περιορισμένη» έως, το πολύ, «μέτριας έντασης». Τα

αποτελέσματα των ερευνών σε επιμέρους χώρες παρουσιάζονται στις αντίστοιχες Εθνικές Εκθέσεις και, συνοπτικά, στα Παραρτήματα Β1 και Β2 της Συνθετικής Έκθεσης.

Με δεδομένη την γενική διαπίστωση σχετικά χαμηλής εμπλοκής των επιχειρήσεων σε δραστηριότητες καινοτομίας, διερευνήθηκαν (επίσης στην Ενότητα 2.3), τα πιθανά «εμπόδια» και οι «ανασταλτικοί παράγοντες» που οι επιχειρήσεις των χωρών αυτών αντιμετωπίζουν. Οι «ελλείψεις επαρκούς χρηματοδότησης» και το υψηλό «κόστος πρόσβασης σε ξένες αγορές» αναδεικνύονται ως οι κύριοι ανασταλτικοί παράγοντες, με κάποιες ωστόσο διαφοροποιήσεις μεταξύ χωρών-εταίρων. Άλλα σχετικά σοβαρά εμπόδια έχουν σχέση με ανταγωνιστικές πιέσεις διαφόρων μορφών που ασκούνται επί των μικρού και μεσαίου μεγέθους επιχειρήσεων (π.χ. ανταγωνισμός τιμών, δεσπόζουσα θέση στην αγορά, εμπορικό σήμα κ.ά.) καθώς και με ελλείψεις σε στελέχη εξειδικευμένα σε θέματα καινοτομίας. Ο τελευταίος αυτός παράγων θεωρείται ιδιαίτερης σοβαρότητας στην Αλβανία και την Ελλάδα (Δείκτες που και στις δύο χώρες υπερβαίνουν το 4.00/5.00).

Με βάση τις παραπάνω διαπιστώσεις, οι έρευνες στις χώρες-εταίρους προχώρησαν (**Ενότητα 2.4**) σε αναζήτηση συγκεκριμένων δεξιοτήτων που θεωρούνται, από τις επιχειρήσεις, απαραίτητες προκειμένου να αναλαμβάνονται καινοτομικές δραστηριότητες οποιουδήποτε τύπου. Μεταξύ 10 διαφορετικών τύπων δεξιοτήτων, ο Μέσος (όλες οι δεξιότητες, όλες οι χώρες και όλοι οι κλάδοι) Δείκτης Σημαντικότητας εκτιμήθηκε σε 4.20/5.00, ένδειξη «ιδιαίτερα υψηλής Σημαντικότητας», με οριακές μόνο διαφοροποιήσεις μεταξύ χωρών (ελάχιστο: 4.08/5.00 στην Βουλγαρία, μέγιστο: 4.31 στην Ελλάδα). Είναι ενδιαφέρον να σημειωθεί ότι παρατηρούνται έντονες αντιστοιχίες στο πως ορισμένοι τύποι δεξιοτήτων ιεραρχούνται από τις επιχειρήσεις στις επιμέρους χώρες, ή, με άλλα λόγια, στο ποιες θεωρούνται ότι είναι οι πλέον σημαντικές δεξιότητες, ανεξαρτήτως κλάδου. Οι «**5 Πρώτες – Top 5 – Δεξιότητες για Καινοτομία**» περιλαμβάνουν: (α) «προσωπικές δεξιότητες», όπως π.χ. το «να είναι κάποιος σε θέση να σκέφτεται και να ενεργεί δημιουργικά» ή «να μπορεί να εντοπίζει ευκαιρίες», (β) άλλες δεξιότητες που επιτρέπουν στο συγκεκριμένο στέλεχος να μπορεί να προωθεί την Καινοτομία στο εσωτερικό της επιχείρησης, όπως π.χ. «να είναι επικοινωνιακός» ή «να προωθεί καλλιέργεια καινοτομικής κουλτούρας στην επιχείρηση», ή (γ) ορισμένες περισσότερο τεχνικές δεξιότητες, όπως «ικανότητα για αναλύσεις κόστους-οφέλους των καινοτομιών», καθώς και η «ικανότητα παρακολούθησης και αξιολόγησης των αποτελεσμάτων της Καινοτομίας».

Στην **Ενότητα 2.5**, ζητήθηκε από τους συμμετέχοντες στις έρευνες να τοποθετηθούν με τις προτιμήσεις τους σχετικά με τον τρόπο που θα έπρεπε να οργανωθούν και να υλοποιηθούν πρωτοβουλίες που πιθανώς θα αναλαμβάνονταν για προώθηση της

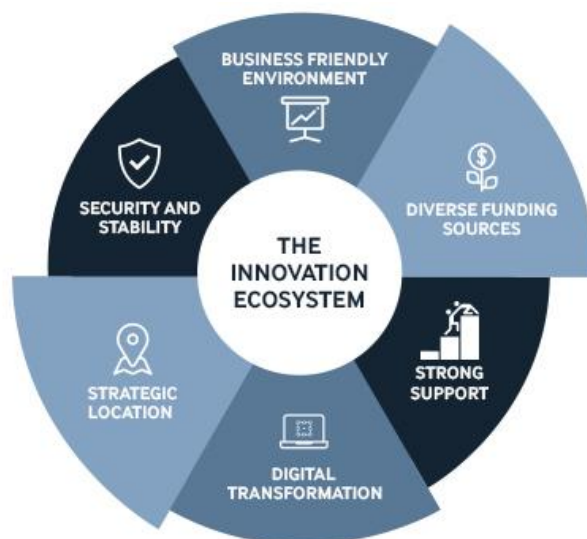
Καινοτομίας. Τα «μηνύματα» που προέκυψαν είναι σαφή! Οι επιχειρήσεις, παρά τους περιορισμούς που το μέγεθός τους συνεπάγεται για αυτοδύναμες πρωτοβουλίες, εμφανίζονται να προτιμούν να στηρίζονται στις δικές τους δυνάμεις και σε αυτές των επαγγελματικών τους Ενώσεων (π.χ. Κλαδικοί Σύνδεσμοι, Επιμελητήρια). Με την έννοια αυτή, αντίστοιχες Κρατικές πρωτοβουλίες, προτιμώνται λιγότερο!

Στην **Ενότητα 2.6**, οι Εθνικές Εκθέσεις και η Συνθετική παρουσιάζουν συστάσεις των επιχειρήσεων για πρωτοβουλίες υποστήριξης της καινοτομικής δραστηριότητας. Ενδεικτικά αναφέρεται ότι τέτοιου είδους πρωτοβουλίες θα πρέπει να αναγνωρίζουν ότι, σε όλες τις χώρες-εταίρους, υπάρχει και λειτουργεί μια σειρά από γενικού και ειδικού χαρακτήρα παράγοντες που περιορίζουν τις δυνατότητες για καινοτομικές δραστηριότητες, ιδίως αυτές των μικρού και μεσαίου μεγέθους επιχειρήσεων. Πολλοί από τους παράγοντες αυτούς δεν αφορούν τις ίδιες τις επιχειρήσεις, αλλά έχουν σχέση περισσότερο με την λειτουργία των κρατικών μηχανισμών (π.χ. αναποτελεσματικότητα, γραφειοκρατία) και την γενική κρατική πολιτική η οποία δεν θεωρείται ως ιδιαίτερα «φιλική προς την καινοτομία»! Επιπλέον, οι τύποι πρωτοβουλιών που φαίνεται ότι προτιμώνται είναι αυτοί που στοχεύουν στην αύξηση της ποσοτικής και ποιοτικής διαθεσιμότητας συντελεστών (ανθρωπίνων, χρηματικών, οργανωτικών και άλλων), που θα μπορούσαν να επενδυθούν σε επιχειρηματικά σχέδια σχετικά μακροπρόθεσμης απόδοσης, όπως είναι και η «καινοτομία». Αυτό θα ήταν εφικτό μέσω πρωτοβουλιών που διαμορφώνονται λαμβάνοντας υπόψη τις σχέσεις αλληλεξάρτησης, συμπληρωματικότητας και συνεργειών μεταξύ όλων των στοιχείων που συνθέτουν το «οικοσύστημα για καινοτομία» σε κάθε χώρα. Το θέμα των δεξιοτήτων που αφορούν την Καινοτομία και, ειδικότερα, οι ελλείψεις που εντοπίστηκαν στις χώρες-εταίρους των ερευνών, είναι ιδιαίτερης σημασίας. Προφανώς είναι έντονη η ανάγκη ορισμένες από αυτές τις δεξιότητες, ιδίως όσες χαρακτηρίζονται ως «οριζόντιας εφαρμογής», να αναπτυχθούν κατά προτεραιότητα, χωρίς αυτό να συνεπάγεται αδιαφορία για άλλες δεξιότητες κλαδικά εξειδικευμένες.

Τέλος, οι ερευνητές και οι οργανισμοί-εταίροι του προγράμματος δεν ήταν δυνατό να παραλείψουν να συγκεντρώσουν και να αξιολογήσουν, απόψεις των επιχειρήσεων και των αντιπροσωπευτικών τους οργανώσεων, για τα πιθανά οφέλη που θα προκύψουν από την υλοποίηση των δραστηριοτήτων του CIDE NET, με την προϋπόθεση βέβαια τι αυτές θα προσελκύσουν ενδιαφέρον για συμμετοχή. Η γενική ανταπόκριση που εκδηλώθηκε μέσω των ερευνών και των συνεντεύξεων στις χώρες-εταίρους, ήταν, χωρίς αμφιβολία, ιδιαίτερα θετική.

Part One: The Ecosystem for Innovating Enterprises in Partner Countries

In this Part, the first of two that the project’s Work Package 3 deliverable is composed of, partners in the five countries constituting the CIDE NET project’s consortium, collected, processed and presented, in their respective National Reports, information on institutional, legal, technical and other aspects of the “environment / ecosystem” in which enterprises of the specific country operate, especially those planning or actually implementing – in various activity sectors - innovation related activities of various types.



The structure of a typical innovation ecosystem is shown on the above picture. In their National Reports, partners described and shortly analysed the situation prevailing, for, at least, part of the main components of this ecosystem, in their respective countries.

Information was derived from national or international sources, as well as from the partners’ own previous work and experience. The authors also contacted a number of Professional Associations and, by interviewing them, obtained their views and suggestions.

In short, among the **key questions** that were asked and answered, for each partner country, were the following:

- ***Have enterprises of the country been engaged in innovation activities? What do studies, reports or other sources of relevant information, show?***
- ***Is the country’s institutional, legal and business environment supportive of enterprises’ innovation initiatives?***

- *Which are the main “actors” in decision making concerning “Support to enterprises’ innovation” Policies?*
- *Are there specific Laws for this? If there are, have they, in practice, operated as expected? What do enterprises’ representative bodies say on this?*
- *Is sufficient funding for innovation activities available?*
- *Are there specialized institutions / organisations supporting innovating enterprises? Do enterprises make use of their services?*
- *How developed are the links between enterprises and higher education institutions and does this assist enterprises in their innovation initiatives?*

While detailed presentations constitute part of the respective National Reports, the main issues emerging from this “National Innovation Ecosystems’ Assessment” for the five CIDE NET partner countries, are the following:

ALBANIA

Albania has undertaken a number of strategic reforms and has adopted policies aimed at developing its research, development, and innovation (RDI) system. Higher education autonomy has been enhanced; curricula and education standards have been revised; monitoring and quality auditing mechanisms have been adopted; and higher education public institutions have been integrated with research institutes to enhance research capabilities. The government has implemented reforms in the governance of innovation policy, regarding its design and implementation, by reallocating decision-making authority and implementation in new operating and coordinating bodies. The Albanian Government has taken recently further steps toward more effective consultation and dialogue with stakeholders, while also establishing new funding programs to support technology transfer. Profound challenges remain, however. Albania lags substantially behind other Western Balkan and EU countries in terms of research capabilities and innovation. Among the most important constraints to the successful implementation of research and innovation policy are the lack of human capital, low levels of public financing, and weak governance of research systems. The country does not have a critical mass of specialized researchers, nor does it have sufficient infrastructure and funding for research excellence. It is not adequately capitalizing on knowledge from skilled nationals abroad through enhanced innovation linkages, much less reversing migration trends by providing professionals new and better employment opportunities. Without an enhanced program of RDI, the country will remain a source of low technology (and low value added) exports, which, together with the self-imposed exile of its scientific talent, will delay if not altogether divert its

development path away from more rapid growth based on higher technology and valued added goods and services. Top priorities for national action, in line with Albania’s National Strategy of Science, Technology, and Innovation, as well as the broader Western Balkans Innovation Strategy being developed in collaboration with the World Bank and the EU, strengthen links between science and companies to foster innovation as a basis for future growth and job creation;

The main observations concerning the country’s innovation ecosystem may be summarized as follows:

- Albanian enterprises are not sufficiently engaged in innovation activities.
- The country’s institutional, legal and business environment is at very low level supportive of enterprises’ innovation initiatives;
- There is not sufficient funding available for enterprises’ innovation activities. The specialized institutions supporting innovating enterprises (e.g. AKTI and AIDA) provide grants for innovation activities, but only small amounts;
- There are complaints about the links between enterprises and higher education institutions. The role of our universities in spreading new technologies is almost inexistent. Many workshops and scientific seminars are held in the country’s universities and institutions, but their subjects are of rather narrow range.

BULGARIA

Together with many other countries, Bulgaria is defined as a “modest innovator”, with innovation activity lower than the EU average levels. For Bulgaria in particular, after a sharp decline in 2011 followed by a slight increase during the next years the innovation activity indicators came back to 47.5% of the EU average and so, for the observed period the overall innovation performance in Bulgaria remained stable.

A number of crucial parts of the **Bulgarian Innovation eco-system** may be interpreted as constituting “obstacles” on innovation activity. In particular:

- There is a significant discrepancy between the needs of the labor market and the demand of qualified staff.
- Public and Private sectors’ **R&D expenditure** remains too low and far behind the 2020 targets.
- **Links** between basic and applied research and between research and the marketplace are not very strong.

- There is a need for more adapted **funding** for innovating enterprises (SME-s and start-ups) and more eased administrative procedures and access to funding.
- **Legislation and the Regulatory framework** encourages and facilitates innovation, but is not followed by the necessary actions for its successful implementation.

CYPRUS

- Public Sector has been and still remains dominant in funding of R&D and innovation in Cyprus, well over the EU average.
- The Private Sector’s participation remains very low compared to EU average but relative participation has been increasing in the post-crisis years.
- Cyprus remains a “Moderate Innovator”.
- Intellectual Assets appear to be the strongest innovating element in Cyprus.
- Following the economic crisis, considerable reforms have been made to promote the innovative aspects of the Cypriot economy, in the form of the charting of new policies and strategies.
- Innovation is now understood to expand beyond its traditional R&D field to all applicable themes.
- Legal and financial incentives to promote the operation of SMEs and Start-Ups have been created as a result of the above.
- Due to the largely public nature of Innovation activities up to date, most supporting institutions are under Public control.
- The business sector of innovation has been generally lagging.
- Despite Universities and relating research institutions being regarded as major cooperators in the innovative ecosystem in Cyprus, this has yet to be identified in relating data.
- The feasibility and effectiveness of current programmes and initiatives regarding enterprises innovation activities have received mixed comments.
- Innovation Ecosystem improvement suggestions mention the emphasis on sector-specific multiplier initiatives, increased State coordination of innovative activities and improvement of legislation.
- Identifiable self-initiated enterprise actions are a preemptive response to market, network building, sectoral changes and technology investment.
- Types of innovation carried out in enterprise level are life-long learning, ICT training, and information collecting while Innovative enterprises are distinguished by unique products and production methods and adaptive, money saving and profitable innovation.

- There seem to be substantial potential for sectoral synergies between CIDE-NET projects and innovative entrepreneurship.

FYROM

The recently published “European Innovation Scoreboard” (2017) Report, classifies FYROM as a “modest innovator”, along with Bulgaria, Romania and Ukraine.

Creating an innovation driven economy is a key challenge, given that the country is designated as a modest innovator, and as an indicator were taken into account the research and development costs that were only 0.44% of GDP in 2014, well below the EU 28 average these costs amounted to 2.03%. The Fund for Innovation and technological development is planning to provide opportunities for companies to develop capacity to absorb grants for research, development and innovation, to increase cooperation between academic institutions and companies, and increase readiness for investments. All of this in order to influence the expanding of the productive capacity of the economy and the creation of workplaces and economic growth.

Generally speaking, FYROM lags behind other transitioning countries in educational performance, work readiness and ethnic integration among youth. R&D expenditure fluctuated substantially in recent years, it tended to increase through 2001 - 2015 period ending at 0.4 % in 2015. Because enterprises are making various current and capital expenditures for innovation activities, 44.1% of all expenditures for innovation activities are intended for training of the staff for innovative activities, research and introduction on the market of innovations, design, preparing of feasibility studies, testing of the innovations etc.

Policy uncertainty causes companies to delay investment and consequently innovation decisions. More precisely, companies delay or reduce innovation activities the higher the level of uncertainty and the larger the differences in the expected profitability of innovation investments.

The European Commission’s November 2016 report on FYROM assessed the country’s legislative framework has a sufficient level of alignment with the acquires – except for copyrights, where the regulation of collective management organizations requires further improvement.

GREECE

In the recently published EUROPEAN INNOVATION SCOREBOARD (2017) Report, Greece is also defined as a “moderately innovating country”. Innovation activity is lower than the EU average levels and, following some improvements during the 2007-2013 period, innovation activity indicators decreased and reached 66% of EU average.

A number of comments on some of these indicators may be made:

- (a) **Summary Innovation Index** for Greece relatively to EU-28 average for 2010 and 2016, is characteristic of the country's distance from EU average
- (b) The overall adverse situation in terms of **entrepreneurship development**, is reflected in the corresponding low index of “**Opportunity-driven entrepreneurship**”
- (c) **Venture capital expenditures** indicator remains at very low level and, furthermore, it has been decreasing.
- (d) “**Innovators**” index has dropped by 20 percentage points between 2010 and 2016.
- (e) The most characteristic indicator is the one related to low “**sales impact**” of whatever innovation activity is undertaken by Greek enterprises.

The comments presented may be used in order to identify a number of crucial parts of the **Greek Innovation eco-system** and also to comment on the relatively weak and strong elements impacting, either as “obstacles” or “drivers/facilitators”, on innovation activity in Greece.

Generally speaking:

- (a) The **Greek educational system** (Schools, HEIs, Research institutions) is not considered sufficiently competitive at an international scale and not effectively linked to the needs of Greek enterprises aiming at upgrading and maintaining international competitiveness.
- (b) Public and Private sectors' **R&D expenditure** is low
- (c) **Links** between basic and applied research and between research and the marketplace are weak.
- (d) **Funding** being made available to innovating enterprises, especially to small or medium sized ones and start-ups, is insufficient
- (e) **Legislation and the Regulatory environment** is regarded as creating “obstacles” to innovation, rather than encouraging and facilitating it.

A number of **Concluding remarks** may be made concerning similarities in the Innovation ecosystems in the project partner countries and the stakeholders' views

which were expressed during structured interviews conducted by the project’s partners in the participating countries.

Desk work by partner organisations in the CIDE NET participating countries, was combined with interviews with selected stakeholder organisations. Discussions focused on these organisations’ assessment of their countries’ innovation ecosystems affecting both enterprises’ actual innovation activities and associated performance and also their prospects. Relatively detailed information on the content of these interviews are presented in the National Reports’ Part One (see also Executive Summaries in Annex A of this Synthesis Report).

A synthesis of the main views expressed in the various countries is presented here.

In **Albania**, stakeholders expressed the view that the dialogue between of the business community and the government leaves much to desire. The State owned Agency for Research, Technology and Innovation (AKTI) has hardly any communication with the private sector, although its mission is “to evaluate, finance, monitor and manage programs and projects in the fields of science, technology and innovation in Albania. ARTI aims to fund projects in the field of Small and Medium Business as well as transfer, modernization and renewal of their technologies.

The other governmental Agency AIDA provides an innovation fund where an enterprise can benefit up to approx. 3000 Euro per project. This is considered to be very limited. Business associations suffer themselves for lack of funds either by the small-number membership or other sources to help the companies.

Although there have been discussions about VET in Albania, few only training programs have been initiated by the Government that can contribute to improving the skills of staff and skills specifically related to innovation.

Admittedly, enterprises are not so much oriented to innovation, but more to profit with traditional methods.

According to stakeholder organisations interviewed in **Bulgaria**, access to funding programmes is difficult mainly due to complicated administrative procedures. Programmes do not seem to be very adapted to the needs of the large majority of the companies. In addition, soft measures such as trainings and good practices exchange are considered to be of higher priority than direct financial resource allocation to the development of innovative concepts. According to interviewees, there are potential and opportunities for innovation in Bulgaria but most of the companies are focused on running the daily business and lack of resources to handle

innovation activities. The role of the management is not to be underestimated as a factor for the successful implementation of funded projects. When it comes to funding opportunities at European level, the competitiveness of the Bulgarian companies compared to Western European firms is still not sufficient and as a consequence Bulgarian companies have very limited access to programmes such as Horizon 2020.

The effectiveness of the Government’s measures to stimulate innovative businesses, administrative burden, corruption and investors unattractiveness are considered to be among the main obstacles.

Promotion of human resources potentials and interaction between researchers and entrepreneurs are considered as one of the main conditions for stimulating creative processes and innovation. Measures to support the interaction between innovation agents could make the Innovation Ecosystem more dynamic, inspiring and productive. Initiatives such as forums, workshops, network meetings are already being implemented and should be continued and developed to a larger scale. On the other hand, the creation of more adapted and different types of funding opportunities open to a larger number and types of companies would also strengthen the support for innovation. Focusing on methodology and process innovations inside the company would require less resources since there is a lot of free information on the Internet and could be a possible way for companies to stay competitive and follow the innovation trends.

In **Cyprus**, most of the interviewees consider current programmes and initiatives undertaken by Cyprus government to boost innovation, rather inefficient. Suggestions on the Innovation ecosystem improvement included an overall acceptance of the need for sector-specific multiplier initiatives, better coordination of innovative activities information about them, while the retail sector participant also mentioned the need for improvement of legislation and recognized the need for internal sector changes such as mentality change and better cooperative spirit.

The general conclusions drawn from the desktop research are consistent with the views expressed during the interviews. The stance of the business sector towards innovation shows that while there is a general understanding of its meaning and of its potential multiplier effect, there is no real “thinking out of the box” mindset instilled yet, placing emphasis on more traditional elements such as the improvement of skills of personnel and the coordinating role of the state.

In **FYROM**, the view which is presented with significant emphasis is that companies need to improve their innovation capacity and focus on how to prepare themselves for the competitive European market.

They apply for, but do not receive, funding from the SME Facility through the European programs. This is considered as one of the main obstacles to innovation. Successes by few companies is due to the fact that they are innovatively engaged in specific services markets and certainly not to any worth mentioning support receive from outside sources (national, European or international).

Considering this, technology shapes every aspect of the ecosystem, not only people's lives. Including the shaping of the workforce. The future anticipates the young people that have been influenced by the technology and its application to be the main workforce. Taking this into account, with the usage of technology and easier access to information the young workforce is aspired towards more innovative approaches.

Finally, in **GREECE**, interviews conducted with stakeholder organisations' representatives may be summarized as follows:

There have been and still are, several Programmes – both national and European – whose declared objectives are associated with the support of enterprises' innovation. There however several “problems” which make limit these Programmes' relevance for most Greek enterprises. The latter frequently have problems accessing all necessary information and have to rely on intermediaries' services. Even more important, the Programmes' provisions are mainly addressed to enterprises' products and processes innovation, preferably linked to basic research results originating from academic basic or applied research. Other types of innovation, e.g. organizational or marketing innovation, is regarded as “ineligible”. Finally, even in the few cases that Greek SMEs had their Applications for funding approved, the red tape associated with them actually receiving the Grants “promised”, has been frustrating and discouraging! On the whole, while “programmes and initiatives” do exist, their applicability for innovating Greek enterprises has been rather limited!

On the role that the Government and the private sector may play in shaping and developing the country's innovation ecosystem, stakeholders' views are, in general, that the Government and the public sector institutions, in charge, directly or indirectly, of supporting and promoting enterprises' innovative initiatives, are far from achieving their role! Innovation of all types, like all other investment, is, by its nature, linked to benefits expected to be realized in the medium or long term. Therefore, innovation, it is argued, may only be promoted if the general economic

climate and, more specifically, the Government’s taxation and other related policies, facilitate the channeling of resources surpluses resulting from profitable operations and others secured from other sources, away from pressing current needs. In general, especially in current adverse economic conditions, the Government cannot do much and is rather reluctant to reform its taxation policies. Under such conditions, Greek enterprises, especially the small and medium sized ones, may only proceed to the design and implementation of innovative plans, conditional on resources being secured through cooperation with other enterprises, local or foreign ones and, even more important, also conditional to the extent that returns on investment are linked to effective expansion, away from depressed local market, to markets abroad.

Government policies reforms in all elements regarded as constituting the so-call “Innovation EcoSystem” should be encouraged, implemented and their sustainability should be ensured. Policy areas associated with “resources for innovation”, e.g. education, funding, new funding tools, technical support through public research institutions, incentives for links between the academia and the private sector, are few only of the areas mentioned during the interviews conducted.

Part Two: Enterprises’ Innovation Activities – Determinants, Performance and Prospects

2.1 Introductory Remarks: Structure of Synthesis Report’s Part Two and Partner Countries Surveys’ Scope

The Second Part of all partner countries’ National Reports and, consequently, of the project’s Synthesis Report too, presents the findings of Surveys conducted in all five CIDE NET participating countries. The scope of these surveys is to investigate, in each country (and, subsequently, for the entire partnership), “enterprises’ Innovation Activities” and also the “Determinants of Innovation Performance” and the Prospects. These Surveys were conducted in all countries using a Standardised Questionnaire prepared centrally by the project’s Coordinator and distributed to all other partners, together with Guidelines facilitating harmonized implementation and presentation of results (see Annex C, accompanying this Report). Each national partner distributed the Questionnaire to enterprises operating in specific sectors and answers registered online were analysed using standardized processes. Results are presented, mostly using various types of graphics, and discussed in the Reports’ body, while more analytical data are presented in accompanying Annexes. Because of its character, the Synthesis Report cannot elaborate on all aspects identified and discussed in the National Reports for the respective countries and, therefore, the latter should also be consulted by those interested in more detailed analyses referring to individual partner countries.

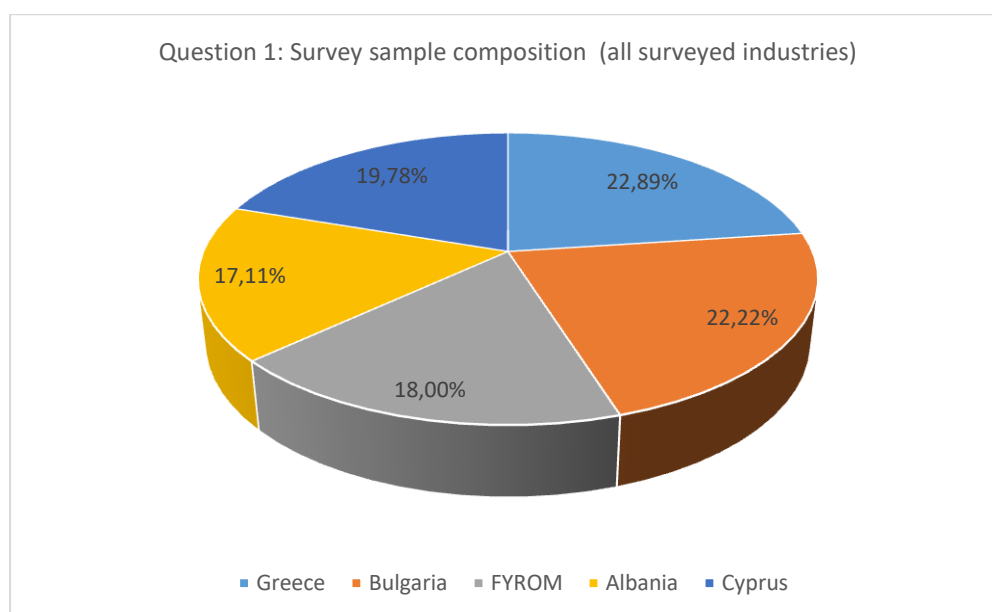
Following the finalization of the Survey’s Questionnaire and the associated survey guidelines, partners proceeded with the Questionnaire’s distribution to a large number of enterprises, especially to those for which available information suggested that they operate in one of the so-called “focus sector” that had previously been identified. This “identification exercise” had been conducted for all partner countries, during the survey preparation phase. The “focus sectors” for most partner countries, were: Tourism, Agrofood, Creative industries (clothing design and production, in particular). Additional country-specific sectors (e.g. Commerce – retail and wholesale or certain key services sectors in Bulgaria, Cyprus and Greece). Reasoning for the above selections is presented in respective countries’ Reports, while the overall sectoral composition of the 450 enterprises surveyed by the partnership is shown on the Table (and accompanying Graph, below)

TNCP Balkan – Mediterranean 2014 – 2020 Project acronym: “CIDE-NET”

CIDE NET Project’s Survey sample’s composition - 5 partner countries

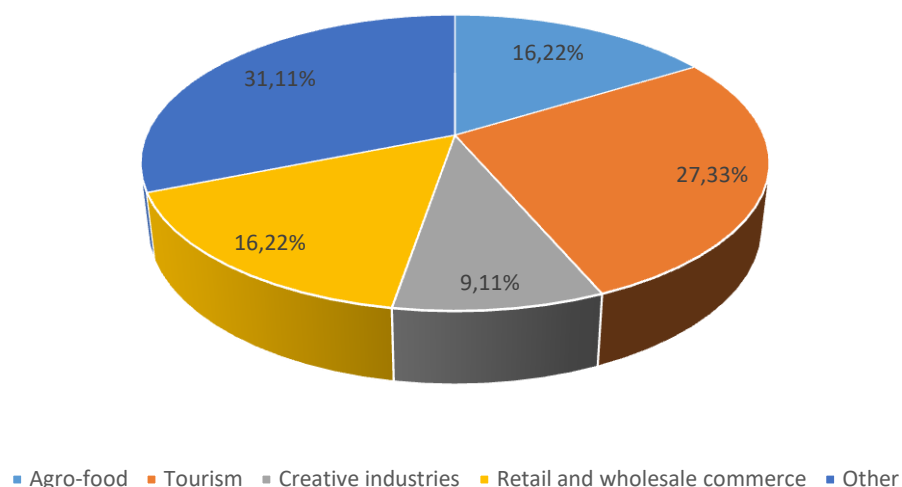
Industries	Partner countries					
	Albania	Bulgaria	Cyprus	FYROM	Greece	All
Agro-food	13 (16.9%)	-	23 (25.8%)	17 (21.2%)	20 (19,4%)	73 (16.22%)
Tourism	30 (39.0%)	24 (24%)	21 (23.6%)	26 (32.5%)	22 (21,4%)	123 (27.33%)
Creative industries	12 (15.6%)	-	-	18 (22.5%)	11 (10, 7%)	41 (9.11%)
Retail and Wholesale commerce	12 (15.6%)	-	23 (25.8%)	18 (22.5%)	20 (19, 4%)	73 (16.22%)
Other	10 (13.0%)	76 (76%)	22 (24.7%)	2 (2.5%)	30 (29, 1%)	140 (31.11%)
Total	77 (100%)	100 (100%)	89 (100%)	81 (100%)	103 (100%)	450 (100%)

Source: Detailed survey results – National Reports - Question 2 (Annex A)



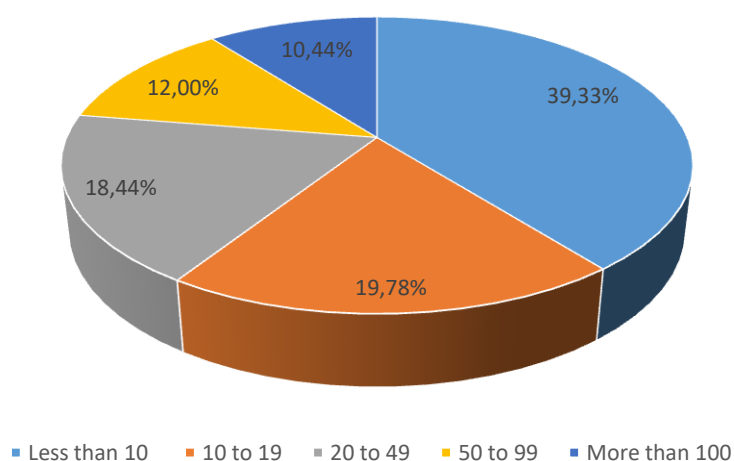
Source: Detailed survey results – Question 1 (Annex B1)

Question 2: Survey sample sectoral composition (All partner countries)



Source: Detailed survey results – Question 2 (Annex B1)

Question 3: Survey respondents' size structure (All partner countries, all industries)



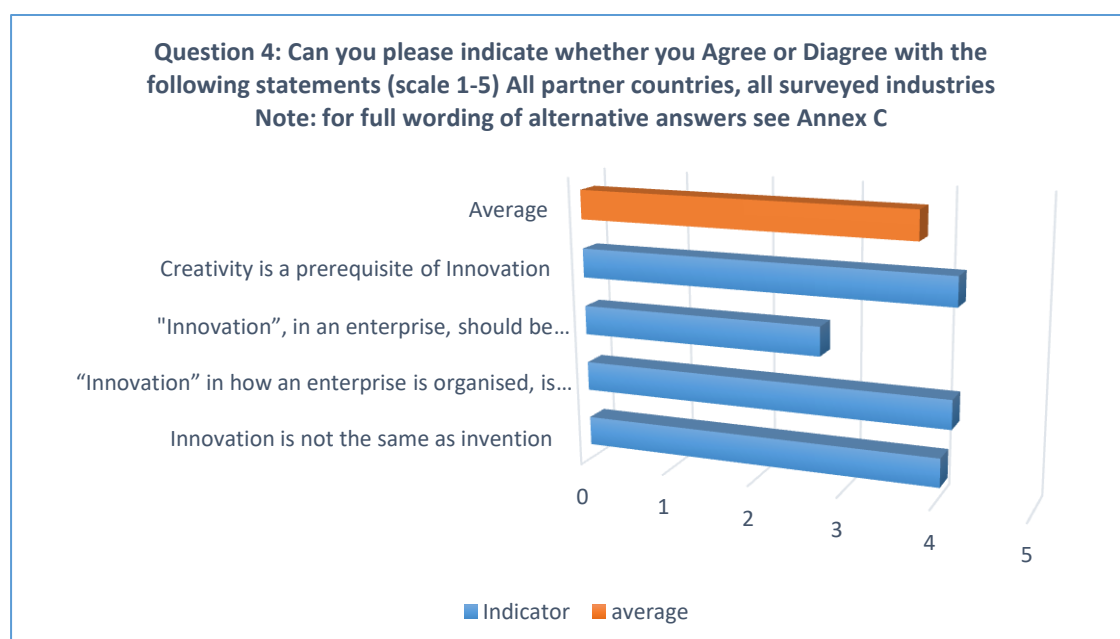
Source: Detailed survey results – Question 3 (Annex B1)

The above Graph related to Survey Question 3 shows for all partner countries together, most of the sample enterprises (39%) employ less than 10 persons and, together with the 10-19 size bracket, they account for approximately 60% of the total sample. There are however 47 relatively large enterprises (100+ persons).

2.2 Enterprises’ General Approach to Creativity and Innovation

For an introductory detection of the sample enterprises’ approach to creativity and innovation, survey participants were asked to indicate the extent of their agreement with the following four basic statements:

- *“Innovation is not the same as invention”*
- *“Innovation” in how an enterprise is organized, is equally important with innovation in the production of products or services”*
- *“Innovation”, in an enterprise, should be responsibility of the technical staff and researchers only”*
- *“Creativity is a prerequisite of Innovation”*



Source: Detailed survey results – Question 4 (Annex B1)

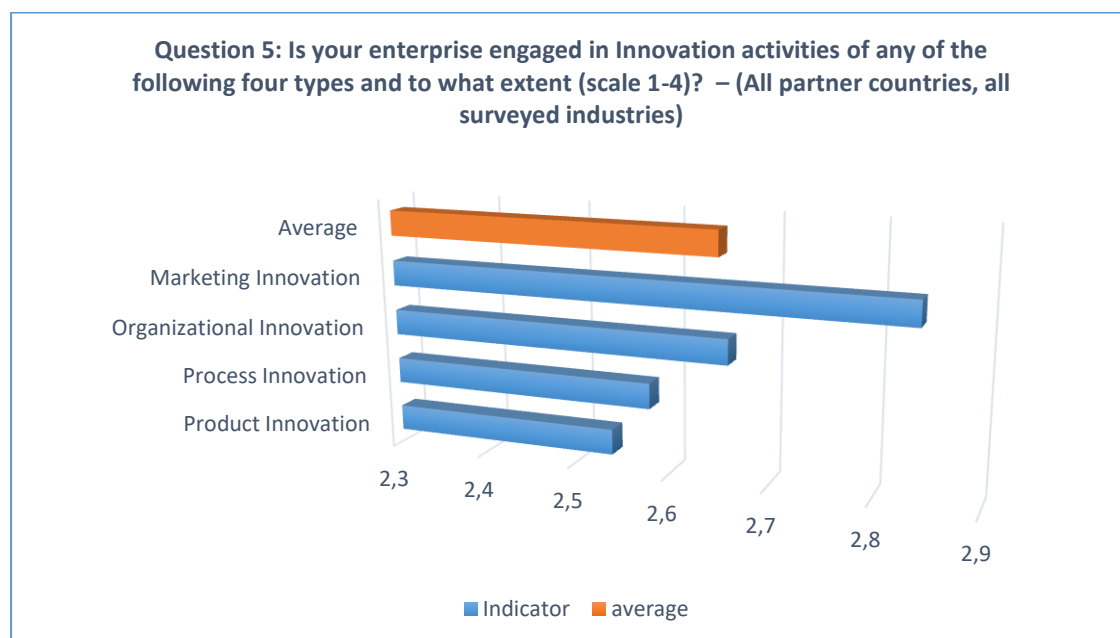
Respondents in partner countries were given the option to indicate the extent of their “agreement” by marking each statement between 1 (“strongly disagree”) and 5 (“strongly agree”). As the graph for Question 4 shows, with the exception of the 3rd statement, for which the “composite average” indicator is estimated at 2.61, for all other statements the corresponding values are very close to maximum value of 4.0 (min.: 3.64 in Albania, max.: 3.88 in Bulgaria – for details and for variations among industrial sectors in each country, see Annex B2). The relative “disagreement” expressed for the 3rd statement, confirms the importance that certain types of enterprises’ innovation activity for which non-technical staff is responsible (e.g. Organisational and Marketing innovation) are considered to be important, especially by relative small firms (up to 20 persons) constituting the majority of survey respondents in all countries.

2.3 Types of Innovation and Perceived Conditioning Factors

In order to establish the type(s) of innovation which enterprises are, to any extent, engaged in innovative activities, enterprises were requested to indicate, for four different types of innovation (“Product”, “Processes”, “Organisational” and “Marketing” innovation), the degree of their engagement (options: “No”, “Yes, very little”, “Yes moderately” and “Yes, a lot”). Based on their responses, relevant indicators were estimated (values: 1 to 4).

On average, the estimated indicators range from maximum 2.84, for Albanian enterprises in t, to minimum 2.47 for their Greek counterparts in Greece, while for all countries taken together the corresponding “average” indicator is estimated at 2.66. These values generally suggest that for enterprises that participated in the surveys, the extent of their engagement with any of the four types of innovation, is somewhere between “very little” and close to “moderately”.

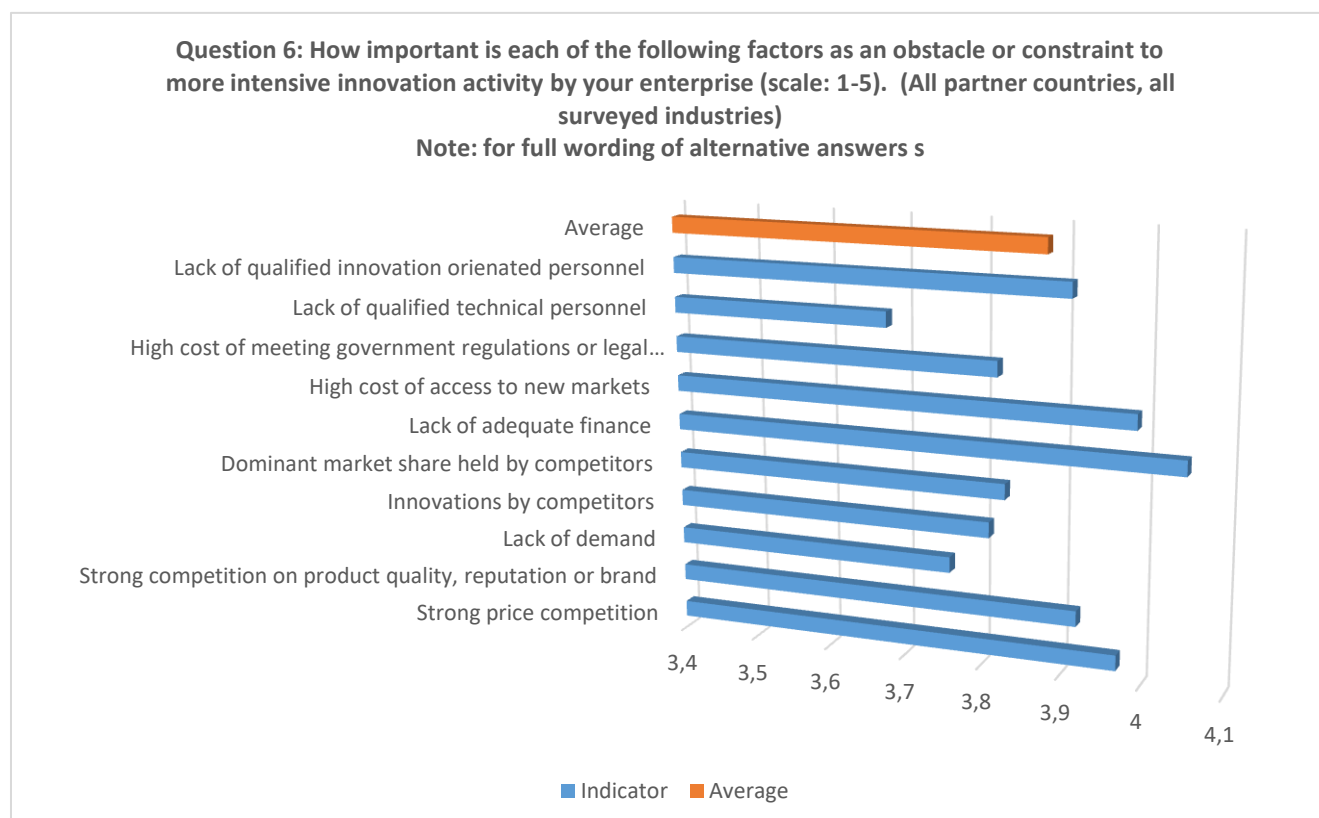
The types of innovation which enterprises in different counties are mostly engaged differ. Based of detailed information presented in Annex B and the National Reports, with the exception of Greek enterprises in which activities concerning Product and Process innovation seem to be relatively more frequent, in all other countries surveyed, “Organisational” and, especially, “Marketing innovation” account for relatively larger part of their interest.



Source: Detailed survey results – Question 5 (Annex B1)

TNCP Balkan – Mediterranean 2014 – 2020 Project acronym: “CIDE-NET”

Since innovation activity in all five partner countries, is, at best, only “moderate”, it is reasonable to further investigate the factors which may create constraints or obstacles to more intensified innovation and, furthermore, check for “similarities” and/or “differences”. In the context of the surveys conducted, enterprises were offered no less than ten different possible factors and were asked to indicate, for each of them, their perceived severity (scale: 1 to 5).



Source: Detailed survey results – Question 6 (Annex B1)

A synthesis of the findings is presented in details in Annex B, while more detailed information may be found in the respective National Reports. For the total sample that the surveys covered, the entries on the Table below are quite revealing.

Top 5 Obstacles to Innovation

Rank Position	Partner countries					
	Albania	Bulgaria	Cyprus	FYROM	Greece	ALL
1st	Lack of technical personnel	Competitors' dominant market share	Cost of access to markets	Lack of finance	Lack of finance	Lack of finance
2nd	Lack of innovation personnel	Strong price competition	Innovation by competitors	Quality, Reputation competition	Cost of access to markets	Cost of access to markets
3rd	Lack of finance	Quality, Reputation competition	Quality, Reputation competition	Cost of access to markets	Government Regulations	Quality, Reputation competition
4th	Strong price competition	Lack of finance	Lack finance	Strong price competition	Lack of innovation personnel	Strong price competition
5th	Cost of access to markets	Cost of access to markets	Lack of innovation personnel	Competitors' dominant market share	Lack of demand	Lack of innovation personnel

Note: Precise specification of “obstacles to Innovation” may be found in Annex C (Survey Questionnaire)

In particular, having ranked the various types of “obstacles” for each partner country, the Table suggest the following:

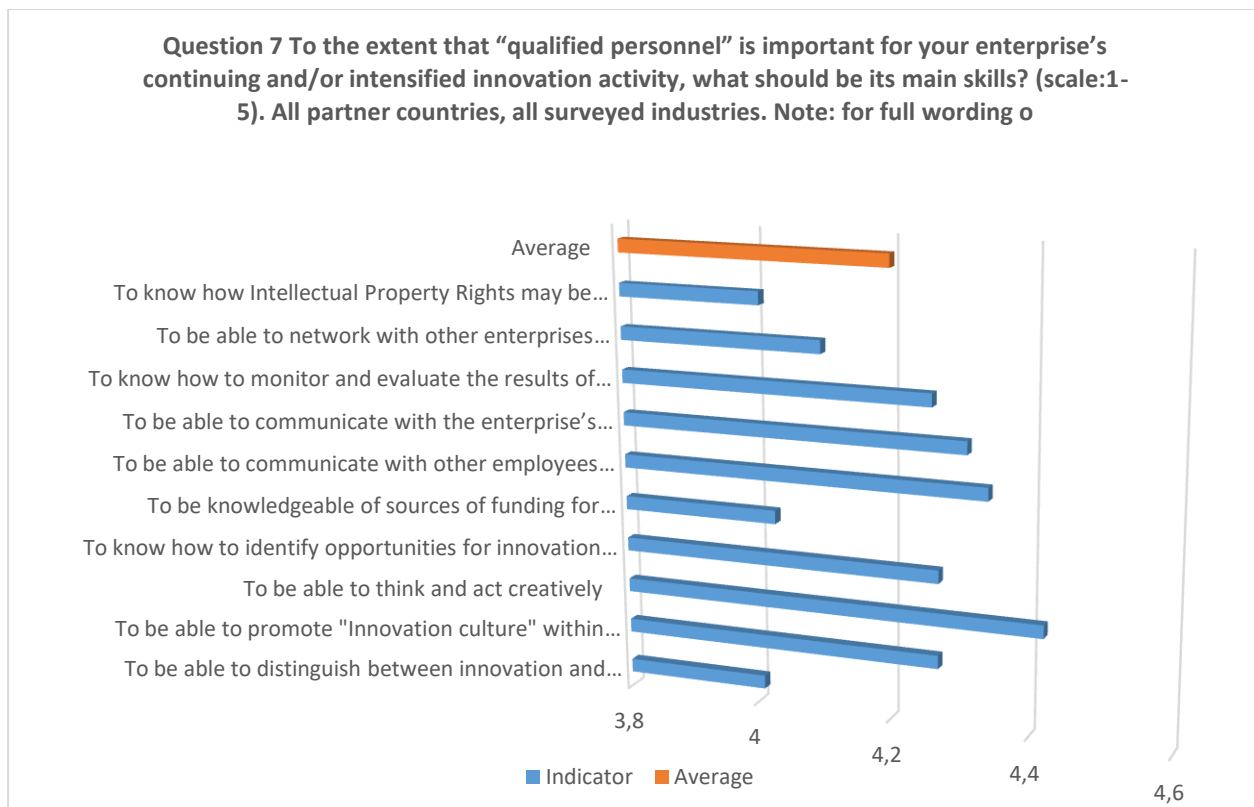
- (a) “Lack of finance” is, according to the survey respondents in all partner countries, individually and as a whole, a major obstacle to innovation.
- (b) Competition, expressed in various forms (i.e. price competition, market dominance or competitors' reputation and brand name) are also severe obstacles.
- (c) “Lack of innovation related personnel” is also mentioned among the relatively most significant “obstacles” (Albania, Cyprus, Greece in particular, but for the sample as a whole).

It is also worth noting the presence, among the “5 Top” obstacles, especially for Greek enterprises, factors associated with “Lack of demand” and “Government Regulations”, associated with enterprises' innovation activities or of more general type.

2.4 Enterprises’ Innovation: The “Skills Factor”

Since “Shortages of qualified innovation oriented personnel” seems to be among the major concerns for enterprises in most partner countries and for the group as a whole, survey respondents were further asked to indicate what sort of skills would such personnel need to have and to prioritise such skills according to their relative significance (scale: 1 to 5). The ten types of skills offered for consideration were the following:

- *To be able to distinguish between innovation and inventions and between types of innovation suitable for the enterprise*
- *To be able to promote "Innovation culture" within the company*
- *To be able to think and act creatively*
- *To know how to identify opportunities for innovation and conduct “cost – benefit” analyses*
- *To be knowledgeable of sources of funding for innovation and funding related procedures*
- *To be able to communicate with other employees and develop synergies*
- *To be able to communicate with the enterprise’s Management and promote innovation Proposals*
- *To know how to monitor and evaluate the results of innovation*
- *To be able to network with other enterprises (national and/or foreign) and negotiate joint innovation initiatives*
- *To know how Intellectual Property Rights may be protected*



Source: Detailed survey results – Question 7 (Annex B1)

The “indicators of significance” are, on average (i.e. all skills, all countries), 4.20, (ranging between 4.08 for Bulgarian and 4.31 for Greek enterprises), implying that all of them are perceived as being close to “very significant”, with marginal only differences among partner countries. It is interesting to note that, as the following Matrix-Table indicates, there are noticeable similarities among countries on how types of skills are ranked and, more specifically, which are the most significant skills, independently surveyed enterprises’ nationality. The “Top 5 Skills for Innovation” include: (a) “personal skills”, such as “to be able to think and act creatively” or “to be able to identify opportunities”, (b) other skills related to the person concerned being able to promote innovation within the firm, such as “to be able to communicate” or “to promote the enterprise’s innovation culture” or (c) some more technical skills, such as: “to be able to monitor and evaluate the results of innovation”.

Top 5 Skills for Innovation

Rank	Partner countries					
	Albania	Bulgaria	Cyprus	FYROM	Greece	ALL
1st	Communicate and develop synergies	Communicate and develop synergies	Think and Act Creatively	Monitor /Evaluate Results	Think and Act Creatively	Think and Act Creatively
2nd	Think and Act Creatively	Network and negotiate joint ventures	Monitor /Evaluate Results	Think and Act Creatively	Identify Opportunities	Communicate and develop synergies
3rd	Promote Innovation Proposals	Think and Act Creatively	Communicate and develop synergies	Identify Opportunities	Promote Innovation Proposals	Promote Innovation Proposals
4th	Monitor /Evaluate Results	Promote Innovation Proposals	Identify Opportunities	Promote Innovation Proposals	Promote “innovation culture”	Identify Opportunities
5th	Promote “innovation culture”	Promote “innovation culture”	Promote “innovation culture”	Communicate and develop synergies	Monitor /Evaluate Results	Monitor /Evaluate Results

Note: Precise specification of “Skills for Innovation” may be found in Annex C (Survey Questionnaire)

2.5 Enterprises’ Innovation: Prospects for Skills Upgrading Initiatives

Two of the main survey findings presented and discussed in the previous two sections of the Report were: **First**, that “shortage of qualified innovation related personnel” is among the factors negatively affecting enterprises’ innovative activity” and, **Second**, that “strengthening such personnel’s capacity to contribute” implies acquisition of specific skills”. These two findings, in combination with each other, constitute arguments underlying CIDE NET project’s rationale and clearly point to the importance of providing innovating enterprises with well-designed and effectively delivered training services. To further support initiatives, two more crucial aspects were investigated through the Surveys undertaken in partner countries. These were the following:

- (a) Who should lead Innovation Support Initiatives?** and,
- (b) How should Innovation related training be designed and delivered?**

The responses obtained for the above two questions and their processing (i.e. estimation of indicators ranging between 1 and 5), are shown below (for the surveyed countries, individually and as a whole):

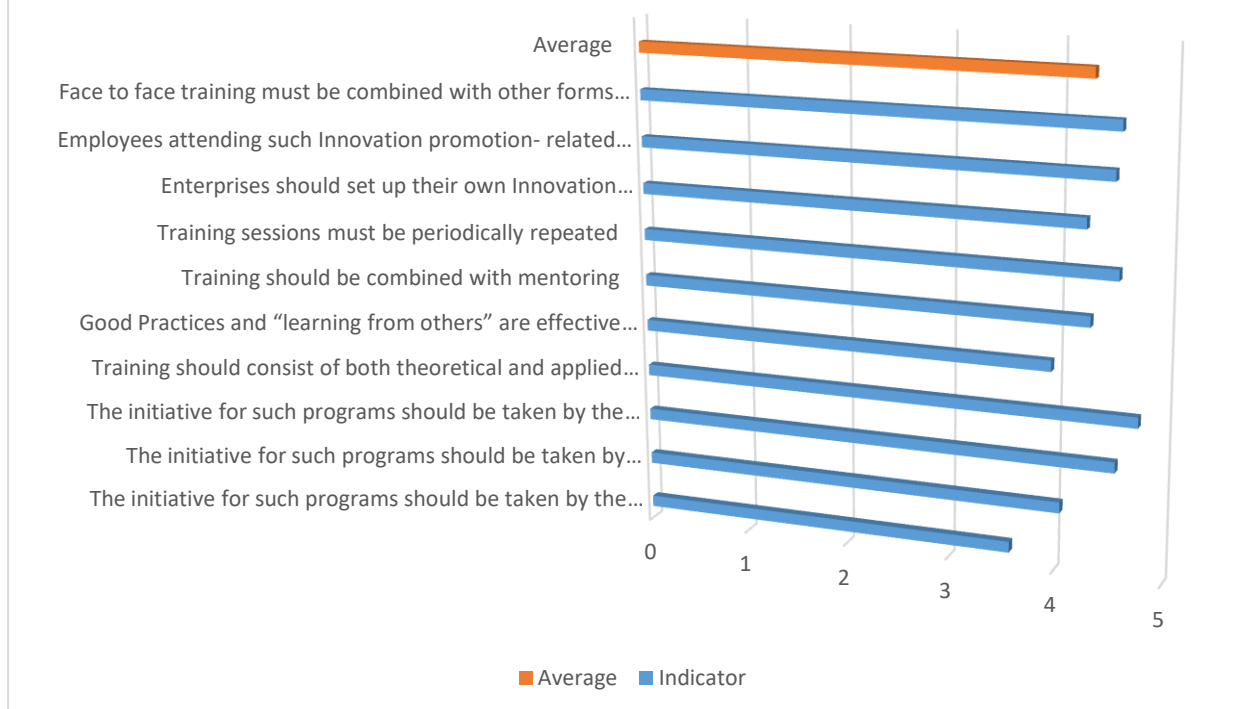
(a) Who should lead Innovation Support Initiatives?

- The initiative for such programs should be taken by the enterprises themselves **(4.23, on average for all countries)**,
- The initiative for such programs should be taken by Enterprises’ Collective Organizations (e.g. Associations, Chambers of Commerce, etc.) **(4.13)**
- The initiative for such programs should be taken by the Government **(3.84)**
- Enterprises should set up their own Innovation Departments **(3.70)**

(b) How should Innovation related training be designed and delivered?

- Training should consist of both theoretical and applied knowledge **(4.53, most preferred in all counties)**
- Good Practices and “learning from others” are effective training methods **(4.33)**
- Face to face training must be combined with other forms of training that could facilitate flexibility as regards attendance (e.g. synchronous and asynchronous e-learning, studying of case studies over the Internet, etc.) **(4.28)**
- Training should be combined with mentoring **(4.26)**
- Training sessions must be periodically repeated **(4.03)**

Question 8: Given that, as it is generally believed, certain types of training programmes could contribute to upgrading staff skills and innovation-related skills in particular, indicate whether you agree or disagree with the following statements (scale:1



Source: Detailed survey results – Question 8 (Annex B1)

The messages derived from the above findings are clear! Enterprises, despite the fact that their size may pose constraints on independently initiating innovation related projects, seem to favour schemes combining their own capabilities with those of Business representative organisations, such as Associations, Chambers of Commerce. In this context, Government-initiated schemes are, in relative terms, the least preferred! Elements which the enterprises would like to see being incorporated in the design of innovation related training programmes and in their respective delivery modes, are also apparent:

- Blending theory and applied knowledge
- Flexible (i.e. blended) delivery modes
- Periodic updating of training material and refreshment courses

2.6 Interpreting the Survey Findings in the Partner Countries – Stakeholders’ Views

The common methodological guidelines adopted and implemented by all partner organisations, required that, after the conclusion of their national surveys, of which a Synthesis was presented in previous sections of this Report, researchers should also search and obtain, from each of the selected and surveyed sectors’ stakeholders – from people, that is, who have a broader exposure to the sector, their views of “*what works*” and “*what could work*” for enterprises’ innovation in the specific partner country and sector.

Interviewed persons were expected to: (a) provide their assistance and contribution for interpreting survey results, (b) supplement these results with additional information, (c) make “policy recommendations” to decision makers and, finally, (d) recommend what stakeholders could do, after the CIDE NET project’s completion, for ensuring sustainability of the project’s outputs, especially, on the issue of “cross border enterprises’ cooperation for Innovation”.

The specific issues discussed during the interviews conducted, covered many issues, directly or indirectly linked to the Survey’s specific questions and significantly assisted researchers in interpreting the results presented and discussed analytically in their National Reports. Because of the particular emphasis adopted by the CIDE NET Project in general, it was decided to present in this Section of the Synthesis Report a short summary of views expressed on the crucial issue of Skill Gaps identified in many sectors and partner countries and on recommendations of how such Gaps could be covered. This summary presentation refers only to those sectors defined as “focus sectors”, in the sense that they constituted areas surveyed in most of the partner countries, although many of the comments made are of a horizontal character. The so-called “focus sectors” were specified by partners’ common agreement, during the preparatory phase of the surveys to be conducted in the five CIDE NET project participating countries. These were: **Agrobusiness**, **Tourism** and **Commerce** (wholesale and retail). In addition, the so-called **Creative industries**, was also to be surveyed in most of the partner countries (details of sectors surveyed are shown in Annex B1 and of course in the respective countries’ National Reports).

It is noted that the summary presented here is based on three sectors-specific information - Agrobusiness, Tourism and Commerce traced in two partner countries’ National Reports (Cyprus and Greece) and Creative industries in Greece. Altogether this particular survey subgroup accounts for 45% of the total number of surveyed enterprises in all sectors and all partner countries (excluding those in “other” sectors). It is also noted that it contains general only remarks referring to the

partner countries’ surveyed sectors and is, in no way, as detailed and comprehensive as the corresponding sections in the respective countries’ National Reports.

The **Agrofood** sector stakeholders in Cyprus and Greece consider it as one of their countries most promising sectors. Thanks to high quality raw materials, final products are supposed to be quite competitive, certainly in terms of quality but not so much in terms of price. Despite qualitative advantage, the local products have lost market shares, even in the domestic market. There is ample room for innovation of all types – i.e. both product innovation but also organizational and marketing innovation. Several studies have emphasized the need for more systematic standardization of products, especially for those to be exported, but also for marketing innovation for organised penetration in international market, in which competitors’ offering lower quality products perform better than Greek exporters. To be able to implement such innovation plans, the issue of adequacy of resources – both human and financial – is a crucial issue. As survey results suggest, the industry’s respondents indicate that “lack of innovation related personnel” is relatively crucial and therefore, together with other initiatives aiming at reducing production costs, they would welcome implementation of appropriately organised training programmes.

The predominant feature in the evolving structural and operational situation in Cypriot and Greek **Commerce** (whole and retail) is the competition between large enterprises operating as distribution chains and smaller enterprises attempting to retain market shares (and employment) through competitive offers to customers. Innovation in products, services, organisation and marketing is continuous and very pronounced, at least by those who can afford the relevant cost. Insufficiency of trained personnel is often being mentioned as a major problem, given the high rotation observed and the resulting low incentive to offer or to receive appropriate training. It should also been mentioned that, in several national or European programmes supporting innovation, Commerce is not considered eligible.

Tourism has traditionally been a very important sector of both the Cypriot and the Greek economy, with a significant contribution in terms of employment and Balance of Payments inflows. It is therefore not accidental that many call it the country’s “heavy industry”. While competition with other Mediterranean destinations has always been fierce, Greek tourist enterprises, despite several problems associated with lacking infrastructures, outdated institutional environment and insufficiency of modern specialized hotel management personnel, have shown remarkable resilience and growth potentials. However, with intensified international competition and tourist flows becoming increasingly more cost conscious, the need for continuous innovation in terms of new products/services and organisational practices, is realized

by the entire spectrum of operators, i.e. hotel owners, tour operators etc. They become more eager to adopt new management technologies, get exposed to good practices and even join international tourism networks and enterprises' chains. They also seem determined to consider innovative new “products”, such as agro-tourism, religious tourism, special purpose tourism (e.g. conference tourism), aiming at resolving the chronic seasonality problem of Greek tourism (with about 50% of activity being concentrated in only 3-4 months period between June to September).

Finally, for the purposes of CIDE NET project, Greek “creative industries”, a particularly diversified activity sector, has focused on textiles and garments industry and, specifically, on its relatively more “fashion & design” intensive parts. The industry has for several decades been dependent on production subcontracted from European enterprises attracted by low labour costs. However, having lost its cost advantage to producers in East Europe, Asia and Africa, the part of local industry that has managed to survive the combined pressures of shrinking domestic market and difficult to penetrate markets abroad, is now turning to more innovative technology intensive production techniques and products' marketing. Several interesting start-ups have emerged in recent years and the new innovation-driven approach is gradually being adopted, especially by the sector's small and medium sized enterprises. Needless to say, these new approaches have revealed serious shortage of trained personnel, both technical and innovative marketing related.

2.7 Recommendations for Enterprises' Innovation Supporting Initiatives

The Survey's findings presented and discussed in previous sections, allow the formation of some, purely tentative, recommendations on the character, the content and the Organisation of Greek Enterprises' Innovation supporting initiatives.

It has to be realized that, in general, enterprises' innovative activity has been severely hit by recent adverse economic situation in the country, which, combined with policy making negatively affecting enterprises' profitability, has limited available resources for all kinds of investment. At the same time however, recent signs of weak recovery, combined with enterprises realizing that innovation may constitute an integral part of a “survival and development” strategy, results in innovation and Greek Enterprises' Innovation supporting initiatives becoming a very topical issue.

The CIDE NET Survey results' presentation and discussion, suggest the following:

- (a) Greek enterprises, especially the small and medium sized ones, are moderately only engaged in innovation-related activity.
- (b) There is a series of general and specific obstacles and constraints that limit such activity. Many of these obstacles are not related to the enterprises themselves, but are instead associated with general policy making.
- (c) Innovation supporting initiatives that seem to be favoured by surveyed enterprises, should, generally speaking, be associated with improving the amount and quality of resources, human, financial, organizational and other, that may be invested for business development purposes. This will be significantly facilitated by initiatives targeting all the elements of the country’s “innovation ecosystem”.
- (d) The issue of “innovation related personnel skills” was particularly investigated. It seems that a wide range of horizontal skills need to be further developed, although sector-specific needs must also be considered.
- (e) Enterprises themselves and Business Community representative organisations, seem to be, for many reasons, favoured, as the organisations most suitable for designing and implementing innovation support schemes. The Government however has an equally important role to play, since its general economic policies are, to a large extent, conditioning the effectiveness of private sector’s initiatives.

ANNEXES

ANNEX A

EXECUTIVE SUMMARIES OF PARTNER COUNTRIES’ NATIONAL REPORTS

English and National languages

ALBANIA

CIDE NET Project’s Work Package 3: “Innovation Needs and Potentials” foresees the delivery of: “Reviews of Entrepreneurship Ecosystems in partner countries and Needs Analyses”. The Work Package 3 – “Reviews and Analyses” deliverable for Albania consists of a National Report in two Parts: “Part One – The Ecosystem for Enterprises’ Innovation” and “Part Two – Enterprises’ Innovation Activities – Performance, Skill Gaps and Needs Analyses”. In Part One the Report presents information and commentary on institutional, legal, technical and other aspects of the “environment / ecosystem” in which Albanian enterprises operate. Information has been derived from national or international sources, as well as from the BiznesAlbania previous work and experience. Meanwhile the authors have also contacted a number of Professional Associations and, by interviewing them, obtained their views and suggestions of Good Practices worthy to be considered.

In the Global Innovation Index for 2017, Albania is ranked 93th out of the 127 countries ranked in the worst-case index in Europe. Compared to 2016, Albania is in a down position showing a low level of innovation development in the manufacturing and information technology sector, and has remained mainly only in the context of promoting start-ups, while many countries in the region have now turned to an important provider of information technology (IT) services to third parties and are advancing in the automotive industry. The region ranks much better than Albania. Montenegro is leading 48th, Macedonia is in the 61st position, though deteriorating. Serbia has climbed to 62nd place. Albania ranks worse in the production innovation index, which provides information on output resulting from innovative activities in the economy. (which includes knowledge and technology of production, and creative production). In this sub-index, our country is 115, from the total of 127 countries.

A number of comments on some of these indicators may be made: The overall adverse situation in terms of **entrepreneurship development** that is reflected in the

corresponding low index of “**Opportunity-driven entrepreneurship**” (distinguished from “Need-driven entrepreneurship”). The relevant index for 2017 is estimated at only 28.9% of the corresponding global value, having dropped by approximately 2 percentage points from its 2013 level. **Venture capital expenditures** well as GERD performed by business enterprise indicator are non / available for 2017. The comments presented in Section 1.1, based on Country’s Performance Relative (%) to The Global Innovation **Index** were used in order to identify a number of crucial parts of the Albanian Innovation eco-system and also to comment on the weak and strong elements impacting, either as “obstacles” or “drivers/facilitators”, on innovation activity in Albania. Furthermore, all indicators R&D, joint venture/strategic alliance deals , High-tech imports, research talent in business enterprise either have fallen year-on-year or are n/a.

The Innovation sub-systems discussed in Section 1.2, are the following: • The Educational System • R&D activity expenditures • CIDE NET Project – WP3 Report – • Funding • Legislation and Regulation • The Albanian society’s approach to “innovation” and “innovators” Generally speaking: (a) The Albanian educational system (Schools, HEIs, Research institutions) is not considered sufficiently competitive at an international scale and not effectively linked to the needs of Albanian enterprises aiming at upgrading and maintaining international competitiveness. Public and Private sectors’ **R&D expenditure** is very low; Links between basic and applied research and between research and the marketplace are very weak; Funding being made available to innovating enterprises, especially to small or medium sized ones and start-ups, is insufficient to cope with the need of the companies. GERD financed by business enterprise 3.4 %; According to reference of UNICEF in Albania (2017), secondary school children PISA score is among the lowest compared to other countries, such as the OECD ones. • Public spending for education is 2.9% of GDP, vs. a 4.5% average in EU countries. A review of evidence from similar studies in other countries has shown that the loss associated with a failing educational system is enormous.

Finally, Section 1.3 presents the main issues discussed during interviews conducted with representatives of organisations regarded as “stakeholders”, on basic elements of the Innovation Ecosystem in Albania. The person(s) interviewed were asked his/her views on whether they regard the Innovation Ecosystem in their country as being SUPPORTIVE, FACILITATING, and APPRECIATIVE of enterprises’ innovation activities and their common reply was that the participation of the companies in business association is very low; the dialogue of the business with the government as well as the trust in government leaves much to desire; the government misuses funds earmarked for innovation services.

The Second Part of the Report presents the findings of the Survey conducted in

Albania. The scope of the survey, is to investigate surveyed “enterprises’ Innovation Activities” and also the “Determinants of Innovation Performance” and future Prospects. The “focus sectors” for Albania were: Tourism, Agrofood, Creative industries (clothing design and craft, in particular) and other sectors (Commerce – retail and wholesale). The number of enterprises surveyed with the use of a standardized (for all sectors in all partner countries) was 78, with most of the sample enterprises employing less than 10 persons and, together with the 10-19 size bracket, account for approximately 65% of the total sample. There are however a 20 relatively large enterprises (100+ persons), mostly in Commerce and the Agrofood sectors (8 and 6 enterprises respectively).

Respondents were given the option to indicate the extent of their “agreement” by marking each statement between 1 (“strongly disagree”) and 5 (“strongly agree”). As the graphs below show, with the exception of the 3rd statement, for which the “composite” indicator is estimated at 3.08, for all other statements the corresponding values go approx. to 4.0. The specific finding is confirmed for all individual industries. Furthermore, the disagreement expressed for the 3rd statement, confirms the importance that some types of enterprises’ innovation activity for which non-technical staff is responsible, should also be considered. The specific finding is confirmed for all individual industries. Furthermore, the disagreement expressed for the specific statement mentioned BiznesAlbania – CIDE NET Project – WP3 Report – confirms the importance that some types of enterprises’ innovation activity for which non-technical staff is responsible, should also be seriously considered.

In Section 2.3, the estimated indicators range from maximum 3.23, for enterprises in that part of Agrofood considered, to minimum 2.53 for Tourism, while for all sectors taken together the corresponding indicator is estimated at 2.50. These values generally suggest that for enterprises that participated in the survey position, the extent of their engagement with any of the four types of innovation, is somewhere between “very little” and “moderately”.

The types of innovation which enterprises of different sectors are mostly engaged differ. Based of detailed information presented in Annexes A and B, for all sectors the types of innovation considered relatively more widespread are “innovation in products or services” and “innovation in processes”. For Tourism in particular, marketing innovation” seems to be more important than “innovation in services”, while in creative industries “innovation in marketing is also important.

“Shortages of qualified innovation oriented personnel” seems to be a major concern for enterprises in all industries. Other rather severe obstacles are related to

shortages of other basic resources, such as finance and to adverse demand conditions, in both the home and foreign markets. For the latter in particular, cost for getting access is considered prohibitive for many small Albanian firms. For specific industries, there are of course other factors, such as Price competition, or competition in general for Agrofood but mostly for enterprise in Commerce.

Since “Shortages of qualified innovation oriented personnel” seems to be a major concern for enterprises in all industries, survey respondents were further asked to indicate what sort of skills would such personnel need to have and to prioritize such skills according to their relative significance (scale: 1 to 5).

The “indicators of significance” are, on average (i.e. all skills, all industries), 4.31, implying that all of them are perceived as close to “very significant”, with marginal only differences among sectors (minimum 4.21 for Tourism, maximum 4.37 for Commerce). It is interesting to note that, as the following Table indicates, there are noticeable similarities among industries on how types of skills are ranked and, more specifically, which are the most significant skills, independently of sector. The “Top 5 Skills for Innovation” include: (a) “personal skills”, such as “to be able to think and act creatively” or “to be able to identify opportunities”, (b) other skills related to the person concerned being able to promote innovation within the firm, such as “to be able to communicate” or “to promote the enterprise’s innovation culture” or (c) some more technical skills, such as: “innovation cost-benefit analyses” or “to be able to monitor and evaluate the results of innovation”.

Combining all available rankings of skill types, it may be seen (see the relevant Graphs and Table below) that the skill types ranked at the top of the industry-specific “significance rankings”, do not differ much!

Finally, in Section 2.5, survey respondents were asked to express their preferences on how innovation supporting initiatives could be best organised. The messages derived are clear! Enterprises, despite the fact that their size may pose constraints on independently initiating innovation related projects, seem to favour schemes combining their own capabilities with those of Business representative organizations, such as Associations, Chambers of Commerce. In this context, Government-initiated schemes are, in relative terms, the least preferred! Elements which the enterprises would like to see being incorporated in the design of innovation related training programmers and in their respective delivery modes, are also apparent:

- Blending theory and applied knowledge
- Flexible (i.e. blended) delivery modes
- Periodic updating of training material and refreshment courses

PERMBLEDHJE

Paketa e Punës së projektit CIDE NET 3: "Nevojat për Inovacion dhe Potencialet" parasheh shpërndarjen e: "Shqyrtimeve të Ekosistemeve të Sipërmarrjes në Vendet Partnere dhe Analizat e Nevojave". Paketa e Punës 3 - "Shqyrtime dhe Analiza" që është realizuar për Shqipërinë përbëhet nga një Raport Kombëtar në dy pjesë: "Pjesa e Parë - Inovacioni i Ekosistemit për Ndërmarrjet" dhe "Pjesa e dytë - Aktivitetet e Inovacionit të Ndërmarrjeve" - Performanca, Dallimet e Aftësive dhe Analiza e Nevojave ". Në Pjesën e Parë Raporti paraqet informacion dhe koment mbi aspektet institucionale, ligjore, teknike dhe të tjera të "mjedisit / ekosistemit" në të cilat veprojnë ndërmarrjet shqiptare. Informacioni është nxjerrë nga burime kombëtare ose ndërkombëtare, si dhe nga puna dhe përvoja e mëparshme e BiznesAlbania-s. Ndërkohë autorët gjithashtu kanë kontaktuar me një numër të Shoqatash Profesionale dhe, duke i intervistuar ata, kanë marrë pikëpamjet e tyre dhe sugjerimet e praktikave të mira të denjë për tu konsideruar.

Në Indeksin e Inovacionit Global për 2017, Shqipëria rradhitet e 93-ta nga 127 vendet e renditura në indeksin më të keq në Evropë. Krahasuar me vitin 2016, Shqipëria është në një pozicion më poshtë që tregon një nivel të ulët të zhvillimit të inovacionit në sektorin e prodhimit dhe të teknologjisë së informacionit dhe ka mbetur kryesisht vetëm në kontekst të promovimit të startup-eve, ndërkohë që shumë vende në rajon tani janë kthyer në ofrues të rëndësishëm të shërbimeve të teknologjisë së informacionit (IT) tek palët e treta dhe po avancojnë dhe në industrinë e automobilave. Rajoni renditet shumë më mirë se Shqipëria. Mali i Zi kryeson 48, Maqedonia është në pozitën e 61 megjithatë është në rënie. , Serbia është ngjitur në vendin e 62-të. Shqipëria renditet më e keqe në indeksin e inovacionit të prodhimit, i cili siguron informacion mbi prodhimin që rezultojnë nga aktivitetet inovative në ekonomi. (që përfshin njohuritë dhe teknologjinë e prodhimit dhe prodhimin kreativ). Në këtë nën-indeks, vendi ynë është 115, nga gjithsej 127 shtete.

Një numër komentesh për disa nga këta indikatorë mund të bëhen: Situata e përgjithshme negative në aspektin e **zhvillimit të sipërmarrjes** që pasqyrohet në indeksin e ulët korrespondues të "**Opportunity-driven entrepreneurship**" (i dalluar nga "**Sipërmarrja e shtyrë nga nevojat**"). Indeksi përkatës për vitin 2017 vlerësohet në vetëm 28.9% të vlerës përkatëse globale, pasi ka rënë me rreth 2 pikë në përqindje nga niveli i tij i vitit 2013. **Shpenzimet kapitale të sipërmarrjes** dhe GERD të kryera nga treguesi i ndërmarrjes nuk janë të disponueshme për 2017. Komentet e paraqitura në Seksionin 1.1, bazuar në Raportin e Performancës së Vendit (%) në **Indeksin e Inovacionit Global**, u përdorën për të identifikuar një pjesë të rëndësishme të eko-sistemit shqiptar të inovacionit dhe gjithashtu të komentojë mbi

elementët e dobët dhe të fortë që ndikojnë si në "pengesa", ashtu edhe në "nxitës / lehtësues", mbi aktivitetin e inovacionit në Shqipëri. Për më tepër, të gjithë treguesit e R & D, marrëveshjet e sipërmarrjeve të përbashkëta / aleancave strategjike, importet e teknologjisë së lartë, talentet kërkimore në ndërmarrjet e biznesit ose kanë rënë nga viti në vit ose janë të padisponueshme.

Nën-sistemet e Inovacionit të diskutuara në Seksionin 1.2 janë si më poshtë: • Sistemi Arsimor • Shpenzimet e aktiviteteve të R & D •- Projekti CIDE NET - Raporti i PP3 - • Financimi • Legjislacioni dhe Rregullimi • Qasja e shoqërisë shqiptare ndaj "inovacionit" dhe "inovatorëve". Në përgjithësi: (a) Sistemi arsimor shqiptar (shkollat, institucionet e arsimit të lartë, institucionet kërkimore) nuk konsiderohet mjaft konkurruese në një shkallë ndërkombëtare dhe jo në mënyrë efektive të lidhura me nevojat e ndërmarrjeve shqiptare me qëllim përmirësimin dhe ruajtjen e konkurrencës ndërkombëtare. Shpenzimet për kërkime dhe zhvillim të sektorëve publikë dhe privatë janë shumë të ulëta, lidhjet midis kërkimeve bazë dhe atyre të aplikuara dhe midis kërkimit dhe tregut janë shumë të dobëta; Financimi që vihet në dispozicion të ndërmarrjeve inovative, veçanërisht atyre të vogla dhe të mesme dhe fillestare, është e pamjaftueshme përballen me nevojën e kompanive. GERD (Shpenzimet e brendshme bruto) financuar nga ndërmarrjet e biznesit janë 3.4% Sipas referencës së UNICEF-it në Shqipëri (2017), fëmijët e shkollave të mesme PISA janë ndër më të ultat në krahasim me vendet e tjera, siç janë ato të OECD-së. • Shpenzimet publike për arsimin janë 2.9% të PBB-së, kundrejt një mesatare prej 4.5% në vendet e BE. Një vështrim i evidencave nga studime të ngjashme në vende të tjera ka treguar se humbjet që vijnë nga një sistem arsimor të dështuar janë të mëdha.

Së fundi, Seksioni 1.3 paraqet çështjet kryesore të diskutuara gjatë intervistave të kryera me përfaqësuesit e organizatave të konsideruara si "palë të interesuara", mbi elementet bazë të Ekosistemit të Inovacionit në Shqipëri. Personat e intervistuar u pyetën nëse ata e konsiderojnë Ekosistemin e Inovacionit në vendin e tyre si Mbështetës, Lehtësues dhe Mirënjohës të aktiviteteve të inovacionit të ndërmarrjeve dhe përgjigja e tyre e përbashkët ishte se pjesëmarrja e kompanive në shoqatë biznesi është shumë e ulët; dialogu i biznesit me qeverinë si dhe besimi në qeveri lë shumë për të dëshiruar; qeveria keqpërdor fonde të destinuara për shërbimet e inovacionit.

Pjesa e dytë e Raportit paraqet gjetjet e Sondazhit të kryer në Shqipëri. Fushëveprimi i kërkimit, është të hetojë "Aktivitetet e Inovacionit" të ndërmarrjeve të anketuara dhe gjithashtu "Përcaktuesit e Performancës së Inovacionit" dhe perspektivat e ardhshme. "Sektorët e fokusit" për Shqipërinë ishin: Turizmi, Industria agroushqimore, Industritë krijuese (tekstili, dizajni i veshjeve dhe artizanati, në

veçanti) dhe sektorë të tjerë (Tregti - shitje me pakicë dhe shumicë). Numri i ndërmarrjeve të anketuara (duke përdorur një standard për të gjithë sektorët dhe për të gjitha vendet partnere) ishte 78, me shumicën e ndërmarrjeve si kampione (modele) që punësojnë më pak se 10 persona dhe së bashku me kllapa 10-19 përbëjnë rreth 65% e kampioneve totale. Megjithatë ka 20 ndërmarrje relativisht të mëdha (100 + persona), kryesisht në tregti dhe në sektorët e Agroushqimores (përkatësisht 8 dhe 6 ndërmarrje).

Të anketuarve u është dhënë mundësia të tregojnë shkallën e "marrëveshjes" së tyre duke shënuar në secilën deklaratë në mes të 1 ("pajtohem fuqimisht") dhe 5 ("pajtohem plotësisht"). Siç tregojnë grafikët e mëposhtëm, me përjashtim të deklaratës së 3-të, për të cilën treguesi i "përbërë" vlerësohet në 3.08, për të gjitha deklaratat e tjera vlerat përkatëse shkojnë përafërsisht. në 4.0. Gjetja specifike është konfirmuar për të gjitha industritë individuale. Për më tepër, mosmarrëveshja e shprehur për deklaratën e tretë konfirmon rëndësinë që disa lloje të aktivitetit të inovacionit të ndërmarrjeve për të cilat është përgjegjës personeli jo-teknik, gjithashtu duhet të merren parasysh. Të gjeturat specifike janë konfirmuar për të gjitha industritë individuale. Për më tepër, mosmarrëveshja e shprehur për deklaratën specifike të përmendur në raportin BiznesAlbania - CIDE NET - Raporti WP3 - konfirmon rëndësinë që disa lloje të aktivitetit të inovacionit të ndërmarrjeve për të cilat është përgjegjës stafi jo-teknik, gjithashtu duhet të shqyrtohen seriozisht.

Në Seksionin 2.3, treguesit e vlerësuar variojnë nga maksimumi 3.23, për ndërmarrjet në atë pjesë të Agroushqimores konsiderohen, në minimum 2.53 për Turizmin, ndërsa për të gjithë sektorët e marrë së bashku treguesi përkatës vlerësohet në 2.50. Këto vlera përgjithësisht sugjerojnë se për ndërmarrjet që morën pjesë në pozicionin e studimit, shtrirja e angazhimit të tyre me ndonjë prej katër llojeve të inovacionit është diku midis "shumë pak" dhe "moderuar".

Llojet e inovacionit ndryshojnë ndërmjet ndërmarrjeve sipas sektorëve ku ato janë të angazhuar. Bazuar në informacionin e detajuar të paraqitur në Aneksin A dhe B, për të gjithë sektorët llojet e risive që konsiderohen relativisht më të përhapura janë "risitë në produkte ose shërbime" dhe "inovacioni në procese". Për Turizmin në veçanti, risia e inovacionit "duket të jetë më e rëndësishme se" risitë në shërbime ", ndërsa në industritë krijuese" inovacioni në marketing është gjithashtu i rëndësishëm.

"Mungesa e personelit të orientuar nga risitë" duket të jetë një shqetësim i madh për ndërmarrjet në të gjitha industritë. Pengesa të tjera në vend janë të lidhura me mungesën e burimeve të tjera bazë, siç janë financimi dhe kushtet e pafavorshme të kërkesës, si në tregun vendas ashtu edhe në ato të huaja. Për këtë të fundit në

veçanti, kostoja për marrjen e lejeve konsiderohet e ndaluar për shumë firma të vogla shqiptare. Për industritë specifike, ka sigurisht faktorë të tjerë, si konkurrenca e çmimeve, apo konkurrenca në përgjithësi për Agrofood, por kryesisht për ndërmarrje në Tregti.

Meqenëse "Mungesa e personelit të orientuar nga inovacionet" duket të jetë një shqetësim i madh për ndërmarrjet në të gjitha industritë, të anketuarve u pyetën gjithashtu për të treguar se çfarë lloj aftësish do të duhej të kishte personeli i tillë dhe t'i jepte prioritet aftësive të tilla sipas rëndësisë së tyre relative: 1 deri 5).

"Treguesit e Rëndësisë" janë mesatarisht (dmth. Të gjitha aftësitë, të gjitha industritë), 4.31, duke nënkuptuar se të gjitha ato perceptohen si afër "shumë domethënëse", me dallime të marginalizuara midis sektorëve (minimum 4.21 për Turizmin, maksimum 4.37 për Tregti). Është interesante të theksohet se, siç tregon tabela në vijim, ekzistojnë ngjashmëri të dukshme midis industrive se si klasifikohen llojet e aftësive dhe, më konkretisht, cilat janë aftësitë më të rëndësishme, pavarësisht nga sektori. "Aftësitë më të mira për inovacionin" përfshijnë: (a) "aftësi personale", të tilla si "të jenë në gjendje të mendojnë dhe veprojnë në mënyrë kreative" ose "të jenë në gjendje të identifikojnë mundësitë", (b) aftësi të tjera që lidhen me personin në fjalë të jenë në gjendje të promovojnë inovacionin brenda firmës, të tilla si "të jenë në gjendje të komunikojnë" ose "të promovojnë kulturën e inovacionit të ndërmarrjes" ose (c) disa aftësi më teknike, të tilla si: "analiza kosto-përfitim novatore" të aftë për të monitoruar dhe vlerësuar rezultatet e inovacionit".

Duke kombinuar të gjitha renditjet në dispozicion të llojeve të aftësive, mund të shihet (shih grafikët përkatës dhe tabelën më poshtë) se llojet e aftësive të renditura në krye të renditjes së rëndësisë "specifike" të industrisë, nuk ndryshojnë shumë!

Së fundi, në Seksionin 2.5, të anketuarit u pyetën për të shprehur preferencat e tyre se si iniciativat mbështetëse të inovacionit mund të organizohen më mirë. Mesazhet e nxjerra janë të qarta! Ndërmarrjet, përkundër faktit se madhësia e tyre mund të përbëjë kufizime për iniciimin e inovacionit të projekteve që lidhen me inovacionin, duket se favorizojnë skemat që kombinojnë aftësitë e tyre me ato të organizatave përfaqësuese të biznesit, si Shoqatat, Dhomat e Tregtisë. Në këtë kontekst, skemat e iniciuara nga qeveria janë, në aspektin relativ, më pak të preferuarat! Elementet që ndërmarrjet dëshirojnë të shohin të përfshihen në hartimin e programeve të trajnimit lidhur me inovacionin dhe në mënyrat e tyre të shpërndarjes, janë gjithashtu të dukshme:

- Përzierja e teorisë dhe njohurive të aplikuara
- Modalitetet e shpërndarjes fleksibël (të përzier)
- Përditësimi periodik i materialeve të trajnimit dhe kurseve të freskimit

BULGARIA

CIDE NET Project’s Work Package 3: *“Innovation Needs and Potentials”* foresees the delivery of: “Reviews of Entrepreneurship Ecosystems in partner countries and Needs Analyses”.

The Work Package 3 – “Reviews and Analyses” deliverable for Bulgaria consists of a National Report in two Parts: *“Part One – The Ecosystem for Enterprises’ Innovation”* and *“Part Two – Enterprises’ Innovation Activities – Performance, Skill Gaps and Needs Analyses”*.

In **Part One** the Report presents information and commentary on institutional, legal, technical and other aspects of the “environment / ecosystem” in which Bulgarian enterprises operate. Information has been derived from national or international sources, as well as from the partner’s own previous work and experience, while the authors have also contacted a number of Professional Associations and, by interviewing them, obtained their views and suggestions of Good Practices worthy to be considered.

In successive EUROPEAN INNOVATION SCOREBOARD Reports, Bulgaria is defined as a “modest innovator”, together with countries such as: Romania, Macedonia (FYROM) and Ukraine. In all these countries innovation activity is lower than the EU average levels. In Bulgaria in particular, after a sharp decline in 2011, followed by a slight increase during the next years, the innovation activity indicators came back to 47.5% of the EU average and so, for the observed period the overall innovation performance in Bulgaria remained stable.

A series of country-specific indicators presented and discussed in **Section 1.1** allow comparisons with other EU countries. A number of comments on some of these indicators may be made:

- (a) **Summary Innovation Index** for Bulgaria relatively to EU-28 average for 2010 and 2016, are characteristic of the country’s distance from EU average.
- (b) The European Innovation Scoreboard data shows an important improvement of the **human resources** qualification and an increase in the innovation capacity in terms of knowledge and R&D potential.
- (c) The significant increase of the **Intellectual assets** indicator from 50.7 up to 99.2 points and the improvement of the **Innovation-friendly environment** with 11.8 points show the presence of numerous innovative ideas and imply the existence of necessary conditions to stimulate the innovative activities of the Bulgarian business.

- (d) European Innovation Scoreboard shows a clear and strong deterioration of **venture capital expenditures** for the period 2010-2016 and a global decrease of 43.3 points in **finance and support** for innovation activities.
- (e) Even **firm investments** have been decreased by 7.4 points and SMEs struggle to maintain the relatively good levels of innovations from 2010.
- (f) Some of the **sales impact indicator** components have been slightly improved for the last 6 years.

The comments presented in Section 1.1, may be used in order to identify a number of crucial parts of the **Bulgarian Innovation eco-system** and also to comment on the relatively weak and strong elements impacting, either as “obstacles” or “drivers/facilitators”, on innovation activity in Bulgaria.

The Innovation sub-systems discussed in **Section 1.2**, are the following:

- The Educational System
- R&D activity expenditures
- Networking
- Funding
- Legislation and Regulation
- The Bulgarian society’s approach to “innovation” and “innovators”

Generally speaking:

- There is a significant discrepancy between the needs of the labor market and the demand of qualified staff.
- Public and Private sectors’ **R&D expenditure** remains too low and far behind the 2020 targets.
- **Links** between basic and applied research and between research and the market place are not very strong.
- There is a need for more adapted **funding** for innovating enterprises (SME-s and start-ups) and more eased administrative procedures and access to funding.
- **Legislation and the Regulatory framework** encourages and facilitates innovation, but is not followed by the necessary actions for its successful implementation.

Finally, **Section 1.3** presents the main issues discussed during interviews conducted with representatives of organisations regarded as “stakeholders”, on basic elements of the Innovation Ecosystem in the respective countries.

The person(s) interviewed were asked to provide their views on whether they regard the Innovation Ecosystem in their country as being SUPPORTIVE, FACILITATING, and APPRECIATIVE of enterprises’ innovation activities.

The **Second Part** of the Report presents the findings of the Survey conducted in Bulgaria. The scope of the survey, like those undertaken in all CIDE NET partner countries, is to investigate surveyed "enterprises' Innovation Activities" and also the "Determinants of Innovation Performance" and future Prospects. The "focus sectors" for Bulgaria were: Tourism, Educational Services, Transport and Security services. The number of enterprises surveyed with the use of a standardized (for all sectors in all partner countries) was 100, with most of the sample enterprises employing between 20 and 40 persons.

Резюме

Работният пакет 3 "Иновационни нужди и потенциал" на проекта CIDE NET предвижда изпълнението на: "Преглед на екосистемите за предприемачество в страните партньори и анализи на нуждите".

Работният пакет 3 – по частта "Преглед и анализи" за България се състои от Национален доклад в две части: **"Част първа - екосистемата за иновации на предприятията"** и **"Част втора - Иновационни дейности на предприятията – представяне, пропуски в уменията и необходимост от анализ"**.

В **част първа** докладът представя информация и коментари по институционални, правни, технически и други аспекти на "средата / екосистемата", в които функционират българските предприятия. Информацията е получена от национални или международни източници, както и от предишната работа и опит на партньора, като авторите са се свързали с редица професионални асоциации и посредством проведени интервюта с тях са получили предложения за използването на добри практики, които заслужават да бъдат разгледани.

В последователни доклади на Европейския иновационен индекс България се определя като "скромен иноватор", заедно с държави като Румъния, Македония (БЮРМ) и Украйна. Във всички тези страни иновационната активност е по-ниска от средното ниво за ЕС. По-специално за България, след рязък спад през 2011 г., последвано от леко повишение през следващите години, показателите за иновационна активност достигат 47,5% от средното ниво за ЕС, така че за наблюдавания период общата иновационна производителност в България остана стабилна.

Серия от специфични за отделните страни показатели, представени и разгледани в **раздел 1.1**, позволяват извършването на сравнения с други

държави от ЕС. Могат да бъдат направени редица коментари относно някои от тези показатели:

- а) **Обобщеният индекс на иновациите** за България спрямо средната стойност за ЕС-28 за 2010 г. и 2016 г. е показателен за отдалечеността на страната от средното ниво за ЕС.
- б) Данните от Европейския иновационен индекс показват значително подобрение на **квалификацията на човешките ресурси** и увеличаване на иновационния капацитет по отношение на знанията и потенциала за научноизследователска и развойна дейност.
- в) Значителното увеличение на показателя **"Интелектуални активи"** от 50.7 на 99.2 пункта и подобряването на **средата, благоприятстваща иновациите**, като отбелязва ръст от 11.8 пункта показват наличието на множество иновативни идеи и предполагат съществуването на необходимите условия за стимулиране на иновативните дейности на Българския бизнес.
- г) Европейският индекс за иновации показва ясно изразено силно влошаване на **разходите за рисков капитал** за периода 2010-2016 г. и рязък спад от 43,3 пункта във **финансирането и подкрепата за иновационни дейности**.
- д) Дори **фирмените инвестиции** са намалели с 7.4 пункта, а от 2010 г. насам МСП се опитват да поддържат сравнително добри нива на иновации.
- е) Някои от компонентите на показателите за въздействие върху **продажбите** са леко подобрени през последните 6 години.

Коментарите, представени в **раздел 1.1**, могат да се използват, за да се идентифицират редица важни елементи от българската иновационна екосистема, както и да се направят коментари относно силните и относително слабите елементи, оказващи влияние в качеството си на "пречки" и "движещи сили/катализатори", за иновационната дейност в България.

Подсистемите "Иновации", разгледани в **раздел 1.2**, са следните:

- Образователната система
- Разходи за развойна дейност
- Създаване на мрежа от контакти
- Финансиране
- Законодателство и регулация
- Подход на българското общество към "иновациите" и "иноваторите"

Най-общо казано:

- а) Съществува значително несъответствие между нуждите на пазара на труда и търсенето на квалифициран персонал.
- б) Разходите за научна и развойна дейност, както в публичния, така и в частния сектор остават твърде ниски и много далеч от целите за 2020 г.

- в) Връзките между основните и приложните научни изследвания и между научните изследвания и пазара не са много силни.
- г) Необходимо е по-адаптирано финансиране за иновативни предприятия (малки и средни предприятия и стартиращи фирми) и по-облекчени административни процедури и достъп до финансиране.
- д) законодателството и регулаторната рамка насърчават и улесняват иновациите, но не са последвани от необходимите действия за успешното им прилагане.

Накрая, **раздел 1.3** представя основните въпроси, дискутирани по време на интервюта, проведени с представители на организации, разглеждани като "заинтересовани страни", относно основните елементи на Иновационната екосистема в съответните страни.

Интервюираните лица бяха попитани дали възприемат иновационната екосистема в своята страна като подкрепяща, улесняваща и оценяваща иновационните дейности на предприятията.

Втората част на доклада представя констатациите от изследването, проведено в България. Обхватът на проучването, подобно на предприетите сходни изследвания във всички страни партньори по проекта „CIDE NET“ е да се проучат изследваните "иновационни дейности на предприятията", както и "показателите на иновационната ефективност" и бъдещите перспективи. Секторите, попадащи във фокуса на изследване за България бяха: Туризъм, Логистика, Образователни услуги и Охранителни услуги. Броят на изследваните предприятия с използването на стандартизиран метод (за всички сектори във всички страни партньори) е 100, като почти половината от изследваните предприятия наемат между 20 и 50 души.

На участниците бе дадена възможност да посочат степента на своето "съгласие", като маркират всяко изявление между 1 ("силно несъгласие") и 5 ("силно съгласие") (раздел 2.2). С изключение на третото изявление, за което показателят "комбиниран" се оценява на 3.27 / 5.00, за всички останали твърдения съответните стойности са над 4.00 / 5.00. Конкретната констатация се потвърждава за всички отделни индустрии. Несъгласието, изразено за третото твърдение, потвърждава идеята, че сътрудничеството между различни експерти и екипи в компанията все още е подценявано в българската корпоративна среда и нейното въздействие върху укрепването на иновационните дейности все още не е достатъчно видимо за всички членове на компанията.

В **раздел 2.3** прогнозните показатели варират от максимум 3.24 / 4.00 за предприятията в сектор Логистика до минимум 1.62 / 4.00 в сектора на Услугите за сигурност, докато за всички сектори съответният среден показател се оценява на 2.75 / 4.00. Тези стойности по принцип предполагат, че за предприятията, които са участвали в изследването, обхватът на ангажираността им с някой от четирите вида иновации е доста нисък и може да бъде описан като "много малък" и дори "недостатъчен".

Като се има предвид това показание за твърде ниска ангажираност с иновативни дейности, изследването също така проучи възможните "препятствия / бариери", пред които са изправени предприятията (също в раздел 2.3). "Силната конкуренция" и "Липсата на адекватно финансиране" се извеждат като основни проблеми, пораждащи загриженост сред предприятията във всички отрасли. Други доста сериозни пречки са свързани с "липсата на квалифициран и иновационно ориентиран персонал" и "високите разходи за изпълнение на правителствените разпоредби и законовите изисквания".

В **раздел 2.4** на базата на получените отговори проучването посочва вида умения, считани за най-важни за развитието на иновациите. "Показателите за значимост" са средни (т.е. всички умения, всички отрасли), 4.08 / 5.00, което означава, че всички те се възприемат като близки до "много значими", като разликите между секторите са почти незначителни (минимум 4.94 / 5.00 за Туризъм, максимум 4.30 / 5.00 за Логистиката). Интересно е да се отбележи, че има видими сходства в различните индустрии относно начина, по който се класират видовете умения и по-конкретно кои са най-значимите умения за развитие на иновациите, независимо от сектора. "Топ 5 умения за иновации" включват: а) "лични умения" като "комуникация с други служители" или "умения за работа в екип"; б) други умения, като например "творческо мислене" или "насърчаване на иновационната култура на предприятието", или в) някои по-технически умения, като: "анализи на разходите и ползите за иновациите" или "да може да наблюдава и оценява резултатите от иновациите".

Съчетавайки всички налични класации на типове умения, може да се види, че видовете умения, класирани на предни позиции в класациите за значимост в отрасъла, не се различават много.

Посланията, получени от горните констатации, са ясни. Предприятията, независимо от факта, че техният размер може да създаде ограничения за самостоятелно инициране на проекти, свързани с иновациите, изглежда отдават предпочитания към схеми, които съчетават собствени способности с тези на представителни бизнес организации като асоциации и търговски

камари. В този контекст схемите, инициирани от правителството, са относително най-малко предпочитани. Елементи, които предприятията биха искали да бъдат включени в разработването на програмите за обучение, свързани с иновациите и в съответните им начини на представяне, също са очевидни:

- * Съчетаване на теория и приложно знание
- * Гъвкави (т.е. смесени) режими на доставка
- * Периодично актуализиране на учебния материал и курсове за обновяване и затвърждаване на придобитите знания и умения.

CYPRUS

The Public Sector has been and still remains dominant in funding R&D and innovation in Cyprus, well over the EU average. The Private Sector's participation remains very low compared to EU average, but relative participation has been increasing in the post-crisis years. Cyprus remains a “Moderate Innovator” and Intellectual Assets appear to be the strongest innovating element in Cyprus.

Following the economic crisis, considerable reforms have been made to promote the innovative aspects of the Cypriot economy. In institutional terms, these have taken the form of the charting of new policies and strategies. Innovation is now understood to expand beyond its traditional R&D field to all applicable themes. These are supplemented by legal and financial incentives to promote the operation of SMEs and Start-Ups.

Due to the largely public nature of Innovation activities up to date, most supporting institutions are under Public control, while the business sector of innovation has been generally lagging. Despite the fact that Universities and relating research institutions are seen as major co-operators in the innovative ecosystem in Cyprus, this has yet to be identified in relating data.

According to the interviewed entrepreneurs:

- The feasibility and effectiveness of current programmes and initiatives regarding enterprises innovation activities have received mixed comments.
- Innovation Ecosystem improvement suggestions mention the emphasis on the sector, specific multiplier initiatives, increased State coordination of innovative activities and improvement of legislation.
- Identifiable self-initiated enterprise actions are pre-emptive response to market, network building, sectoral changes and technology investment.

- Types of innovation carried out in enterprise level are life-long learning, ICT training, and information collecting.
- Innovative enterprises are distinguished by unique products and production methods and adaptive, money saving and profitable innovation.
- Synergies between CIDE-NET projects and entrepreneurship are identifiable and can lead to further cooperation provided there is a sectoral adaptation.

The primary survey showed the following:

Almost equal rates of enterprises from the four activities participate in the survey: 25.8% operate in the Agrofood activities, 25.8% in the Retail & wholesale commerce activities, 24.7% in the Services activities and 23.6% in the tourism activities. The majority of respondents in all activities employ less than 10 employees. 14.6% stated that they employ more than 100 employees; the majority of those enterprises operate in the tourism activities. The companies in the agrofood and commerce activities are the ones that mostly employ less than 10 employees (60.9%).

There is a general cross-sector agreement on the statements that “innovation is not the same as invention”, “innovation in how an enterprise is organized is equally important with innovation in the production of products or services” and that “creativity is a prerequisite of innovation”. On the statement “innovation in an enterprise should be the responsibility of the technical staff and researchers only”, significant levels of agreement were stated only in the agrofood sector, while in the other sectors participants were either indifferent or strongly disagreed.

Result variation regarding the Innovation Activities and Constraints is observed when comparing total and sectoral analysis. This could be a result of the different profile of sectors as well as their different priorities. Marketing Innovation is the most commonly practiced innovation activity across all sectors. Competition and Prices are the major constraints regarding innovation promotion.

All skills presented to the survey participants were positively rated regarding their innovation potential. Creativity Skills were the most highly valued, followed by organizational, management and others.

Collective Organisations and Enterprises were stated as the best available innovation programme initiators. Training methods of various types were all rated as useful, with minor sectoral preferences.

The participants in the interviews confirmed the findings of the primary study to a great extent, while differences were observed among sectors.

ΕΠΙΤΕΛΙΚΗ ΣΥΝΟΨΗ

Ο Δημόσιος τομέας υπήρξε και παραμένει κυρίαρχος στη χρηματοδότηση της R&D και της καινοτομίας στην Κύπρο, σε μεγαλύτερο βαθμό από τον μέσο όρο της ΕΕ. Η συμμετοχή του ιδιωτικού τομέα παραμένει πολύ χαμηλή σε σχέση με το μέσο όρο της ΕΕ, αλλά παρουσιάζει αύξηση στα έτη μετά την κρίση. Η Κύπρος παραμένει "Μέτρια καινοτόμος", με τα πνευματικά περιουσιακά στοιχεία να εμφανίζονται ως το ισχυρότερο στοιχείο καινοτομίας στην Κύπρο.

Μετά την οικονομική κρίση, έγιναν σημαντικές μεταρρυθμίσεις για την προώθηση της καινοτομίας της κυπριακής οικονομίας. Από θεσμική άποψη, οι μεταρρυθμίσεις αυτές έχουν τη μορφή χαρτογράφησης νέων πολιτικών και στρατηγικών. Η καινοτομία επεκτείνεται πλέον πέρα από τον παραδοσιακό χώρο R&D, σε όλους τους τομείς. Τα νομικά και οικονομικά κίνητρα για την προώθηση της λειτουργίας των ΜΜΕ και των Start-up συμπληρώνουν τα παραπάνω.

Εξαιτίας της κυρίως δημόσιας φύσης των δραστηριοτήτων καινοτομίας μέχρι σήμερα, οι περισσότεροι υποστηρικτικοί οργανισμοί βρίσκονται υπό δημόσιο έλεγχο, ενώ η καινοτομία ως επιχειρηματικός τομέας γενικά υστερεί. Παρόλα αυτά, τα Πανεπιστήμια και τα αρμόδια ερευνητικά ιδρύματα θεωρούνται ως σημαντικοί συνεργάτες στο καινοτόμο οικοσύστημα στην Κύπρο, χωρίς ακόμη αυτό να αποτυπώνεται με δεδομένα.

Σύμφωνα με τους επιχειρηματίες που συμμετείχαν στις συνεντεύξεις:

- Η σκοπιμότητα και η αποτελεσματικότητα των προγραμμάτων και πρωτοβουλιών σχετικά με τις δραστηριότητες καινοτομίας των επιχειρήσεων έχουν λάβει μικτά σχόλια.
- Οι προτάσεις βελτίωσης του Οικοσυστήματος Καινοτομίας δίνουν έμφαση στον τομέα της καινοτομίας, στις ειδικές πολλαπλασιαστικές πρωτοβουλίες, στον αυξημένο κρατικό συντονισμό καινοτόμων δραστηριοτήτων και στην βελτίωση της νομοθεσίας.
- Οι αναγνωρίσιμες ίδιες επιχειρηματικές δράσεις είναι προληπτική απάντηση στην αγορά, στην οικοδόμηση δικτύων, στις τομεακές αλλαγές και στην επένδυση στην τεχνολογία.
- Τα είδη καινοτομίας που συναντώνται σε επίπεδο επιχειρήσεων είναι η διαβίωση μάθησης, η εκπαίδευση στις ΤΠΕ και η συλλογή πληροφοριών.
- Οι καινοτόμες επιχειρήσεις διακρίνονται από τα μοναδικά προϊόντα και μεθόδους παραγωγής, καθώς και από την προσαρμοστική και κερδοφόρα καινοτομία που στοχεύει στην εξοικονόμηση χρημάτων.

- Οι συνέργειες μεταξύ του έργου CIDE-NET και της επιχειρηματικότητας είναι αναγνωρίσιμες και μπορούν να οδηγήσουν σε περαιτέρω συνεργασία, εφόσον υπάρξει τομεακή προσαρμογή.

Η πρωτογενής έρευνα έδειξε τα ακόλουθα:

Στην έρευνα συμμετείχαν σχεδόν ίδια ποσοστά επιχειρήσεων από τις τέσσερις δραστηριότητες: 25,8% δραστηριοποιούνται στις δραστηριότητες αγροδιατροφής, 25,8% στις δραστηριότητες λιανικού και χονδρικού εμπορίου, 24,7% στις δραστηριότητες παροχής υπηρεσιών και 23,6% στις τουριστικές δραστηριότητες. Η πλειονότητα των ερωτηθέντων σε όλες τις δραστηριότητες απασχολεί λιγότερους από 10 υπαλλήλους. Ποσοστό 14,6% δήλωσαν ότι απασχολούν περισσότερους από 100 εργαζομένους με τις περισσότερες από αυτές τις επιχειρήσεις να δραστηριοποιούνται στον τουρισμό. Οι επιχειρήσεις που δραστηριοποιούνται στην αγροδιατροφή και στο εμπόριο είναι εκείνες που απασχολούν κυρίως λιγότερους από 10 υπαλλήλους (60,9%).

Παρατηρείται συμφωνία ανάμεσα στους τομείς σχετικά με τις δηλώσεις: «η καινοτομία και η εφεύρεση δεν είναι το ίδιο», «η καινοτομία στον τρόπο οργάνωσης μιας επιχείρησης είναι εξίσου σημαντική με την καινοτομία στην παραγωγή προϊόντων ή παροχή υπηρεσιών» και «η δημιουργικότητα αποτελεί προϋπόθεση της καινοτομίας». Για τη δήλωση «η καινοτομία σε μια επιχείρηση πρέπει να είναι ευθύνη μόνο του τεχνικού προσωπικού και των ερευνητών», μόνο στον τομέα της αγροδιατροφής αναφέρθηκε σημαντικός βαθμός συμφωνίας, ενώ στους άλλους τομείς οι συμμετέχοντες ήταν είτε αδιάφοροι, είτε διαφωνούσαν έντονα.

Κατά τη σύγκριση της συνολικής και της τομεακής ανάλυσης παρατηρείται διακύμανση στα αποτελέσματα όσον αφορά τις δραστηριότητες καινοτομίας και τους περιορισμούς. Αυτό θα μπορούσε να είναι αποτέλεσμα του διαφορετικού χαρακτήρα των τομέων, καθώς και των διαφορετικών προτεραιοτήτων τους. Η καινοτομία στο Μάρκετινγκ είναι η πιο συχνά εφαρμοσμένη δραστηριότητα καινοτομίας σε όλους τους τομείς. Ο Ανταγωνισμός και οι Τιμές αποτελούν τους κύριους περιορισμούς όσον αφορά την προώθηση της καινοτομίας.

Όλες οι δεξιότητες που παρουσιάστηκαν στους συμμετέχοντες στην έρευνα αξιολογήθηκαν θετικά όσον αφορά τη δυναμική τους για την καινοτομία. Οι δεξιότητες δημιουργικότητας αξιολογήθηκαν ως οι πιο σημαντικές, ενώ ακολουθούν οι οργανωτικές δεξιότητες, οι δεξιότητες στο management και λοιπές.

Προτιμήθηκε η έναρξη των προγραμμάτων καινοτομίας από Συλλογικούς Οργανισμούς και Επιχειρήσεις. Οι διάφορες μέθοδοι κατάρτισης αξιολογήθηκαν στο σύνολό τους ως χρήσιμες, με μικρές διαφοροποιήσεις ως προς τις προτιμήσεις ανά τομέα.

Οι συμμετέχοντες στις συνεντεύξεις επιβεβαίωσαν σε μεγάλο βαθμό τα ευρήματα της πρωτογενούς έρευνας, ενώ παρατηρήθηκαν διαφορές μεταξύ των τομέων.

FYROM

CIDE NET Project’s Work Package 3: *“Innovation Needs and Potentials”* foresees the delivery of: “Reviews of Entrepreneurship Ecosystems in partner countries and Needs Analyses”.

The Work Package 3 – “Reviews and Analyses” deliverable for FYROM consists of a National Report in two Parts: *“Part One – The Ecosystem for Enterprises’ Innovation”* and *“Part Two – Enterprises’ Innovation Activities – Performance, Skill Gaps and Needs Analyses”*.

In **Part One** the Report presents information and commentary on institutional, legal, technical and other aspects of the “environment / ecosystem” in which enterprises of FYROM operate.

Information has been derived from national or international sources, as well as from the partner’s own previous work and experience, while the authors have also contacted a number of Professional Associations and, by interviewing them, obtained their views and suggestions of Good Practices worthy to be considered.

In the recently published “European Innovation Scoreboard” (2017) Report, FYROM is a modest innovator all along with Bulgaria, Romania and Ukraine.

Creating an innovation driven economy is a key challenge, given that the country is designated as a modest innovator, and as an indicator were taken into account the research and development costs that were only 0.44% of GDP in 2014, well below the EU 28 average these costs amounted to 2.03%. The Fund for Innovation and technological development is planning to provide opportunities for companies to develop capacity to absorb grants for research, development and innovation, to increase cooperation between academic institutions and companies, and increase readiness for investments. All of this in order to influence the expanding of the

productive capacity of the economy and the creation of workplaces and economic growth.

The recently published Report (2017) provides a series of country-specific indicators allowing comparisons with other EU countries (see Table below). In order to briefly describe the situation in FYROM according to this table, the extremes are taken as a comment. They show the previous statements about the situation in our country. Regarding the scoreboard it is clear that the country has a lack of Opportunity-driven entrepreneurship, Finance and support, Public and Business R&D expenditures, as well as Intellectual assets and Employment impacts. On the other hand the index numbers that are above the EU's 28 average are present in the Non-R&D innovation expenditures, SMEs product or process innovation, as well as medium high-tech product exports.

The Innovation sub-systems discussed in **Section 1.2**, are the following:

- The Educational System;
- Research and development;
- Finance and support;
- Legislation and Regulation;
- Intellectual assets;
- SMEs innovation

Generally speaking:

1. FYROM lags behind other transitioning countries in educational performance, work readiness and ethnic integration among youth.
2. FYROM R&D expenditure fluctuated substantially in recent years, it tended to increase through 2001 - 2015 period ending at 0.4 % in 2015. Because enterprises are making different kind of current and capital expenditures for innovation activities, in the business section in Macedonia, 44.1% of all expenditures for innovation activities are intended for training of the staff for innovative activities, research and introduction on the market of innovations, design, preparing of feasibility studies, testing of the innovations etc.
3. In the past two and a half years, only 9% of the innovation funds have been used, even though it is a matter of non-refundable funds.
4. Policy uncertainty causes companies to delay investment and consequently innovation decisions. More precisely, companies will delay or reduce innovation activities the higher the level of uncertainty and the larger the differences in the expected profitability of innovation investments.
5. The European Commission's November 2016 report on FYROM assessed the country's legislative framework has a sufficient level of alignment with the *acquires* –

except for copyrights, where the regulation of collective management organizations requires further improvement.

6. Considering the four types of innovations, the enterprises mostly introduce process innovations, 22.8%, and marketing innovations, 22.3%.

The **Second Part** of the Report presents the findings of the Survey conducted in FYROM. The scope of the survey is to investigate surveyed “enterprises’ Innovation Activities” and also the “Determinants of Innovation Performance” and future Prospects.

The “focus sectors” for FYROM were: Tourism, Agro food, Creative industries (clothing design and production, in particular) and an additional country-specific sector (Commerce – retail and wholesale).

Starting with the structure, the majority of the companies that were part of the survey were enterprises with less than 10 employees (51%). Regarding the enterprises’ point of view towards the innovation and creativity, the majority agree that creativity is a prerequisite for innovation. On the other hand, more than 50% of the enterprises agree that the innovation is not the same as invention, meanwhile they agree that innovative organization of an enterprises is equally important as innovation in products or production.

Regarding the types of innovation that are implemented in their enterprises it was more than obvious that marketing innovation is the innovation that is the most used (45%).

The survey also investigated probable “obstacles/barriers” for low engagement in innovation activities. The main obstacles that were identified are: lack of finance, strong competition on product quality, reputation or brand; high costs of access to new markets, strong price competition and dominant market share held by competitors.

Taking into account the obstacles for intense innovation activities, the enterprises were also asked about the top skills required as a prevention to the obstacles. As pointed out in the table 2.3., thinking and acting creatively as well as promoting innovation culture are the main skill requirements.

We were also interested in their point of view on “How these skills should be incorporated” as well as “Who” should be the one responsible for their incorporation. The answers between the sectors were pretty similar and they resulted with the statements that Innovation support initiatives should be led by the

Enterprises themselves and they should be through Good Practices and “learning from others” are effective training methods as well as Face to face training.

Кратка содржина

Работниот пакет 3 на проектот CIDE-NET: "Потреби и потенцијали за иновации" предвидува доставување на анализата: "Осврти на претприемачки екосистеми во земјата и анализи на потребите".

Овој РП се состои од Национален извештај во два дела: "Прв дел - Екосистем за иновации на претпријатијата" и "Втор дел: Иновативни активности на претпријатија - перформанси, пропусти и анализа на потреби" .

Во првиот дел од извештајот се дадени информации и коментари за институционални, правни, технички и други аспекти на екосистемот во кој работат македонските претпријатија.

Информациите се добиени од национални или меѓународни извори, како и од претходната работа и искуство на организацијата, а авторите исто така контактираа со голем број професионални здруженија и со интервјуирање ги добија своите ставови и предлози за добри практики кои се сметаат за релевантни за да се земат предвид.

Во неодамна објавениот Извештај за достигнати иновативни практики(2017) на Европска Унија, Македонија е оценета како **скромн иноватор** заедно со Бугарија, Романија и Украина.

Креирањето на економијата која е предводена од иновации е клучен предизвик, имајќи предвид дека земјата е именувана како скромн иноватор, а како индикатор се земени предвид трошоците за истражување и развој кои биле само 0,44% од БДП во 2014 година, значително под просекот на ЕУ кој изнесува 2,03%. Фондот за иновации и технолошки развој планира да обезбеди можности за компаниите да развијат капацитет за апсорпција на грантови за истражување, развој и иновации, да ја зголемат соработката меѓу академските институции и компаниите и да ја зголемат подготвеноста за инвестиции. Сето ова со цел да се влијае на проширување на продуктивниот капацитет на економијата и создавање на работни места и економски раст.

Во неодамна објавениот Извештај (2017) се дадени серија индикатори специфични за земјата, кои овозможуваат споредби со другите земји на ЕУ (види Табела подолу). Со цел за кратко да се опише ситуацијата во Македонија

според оваа табела, екстремите се земаат како основ за анализирање и коментирање. Тие ги прикажуваат претходните изјави за ситуацијата во нашата земја. Во однос на табелата, јасно е дека земјата има недостаток од претприемништво, управувано од можности, финансии и поддршка, трошоци за јавни и деловни истражувања и развој, како и влијанија врз интелектуалните средства и вработените. Од друга страна, индексните броеви кои се над просекот на ЕУ се присутни во: трошоците кои не се наменети за иновациско истражување и развој, производствени или процесни иновации во МСП, како и мал број на извоз на високотехнолошки производи.

Аспектите поврзани со иновации дискутирани во Дел 1.2, се следните:

- Образовен систем;
- Истражување и развој;
- Финансии и поддршка;
- Законодавство и регулатива;
- Интелектуална сопственост;
- иновации на МСП

Генерално:

1. Македонија заостанува зад другите земји во транзиција во однос на образовните перформанси, работната подготвеност и етничката интеграција меѓу младите.
2. Трошоците за истражување и развој во Македонија значајно флукутираат во последниве години, а во периодот од 2001 до 2015 година се имаат зголемено за 0,4%. Бидејќи претпријатијата прават различни видови на тековни и капитални трошоци за иновативни активности, во деловен дел во Македонија, 44.1 % од сите расходи за иновативни активности се наменети за обука на вработените за иновативни активности, истражување и воведување на пазарот на иновации, проектирање, изработка на физибилити студии, тестирање на иновации итн.
3. Во изминатите две и пол години, само 9% од фондовите за иновации се искористени, иако станува збор за неповратни средства.
4. Неизвесноста на политиките и регулативите предизвикува компаниите да ги одложат инвестициите и одлуките за иновации. Попрецизно, колку е поголемо нивото на несигурност во овие регулативи и идна профитабилност, толку повеќе компаниите ги одложуваат или намалуваат иновативните активности и инвестиции.
5. Извештајот на Европската комисија од ноември 2016 година за Македонија оцени дека законодавната рамка има доволно ниво на усогласување со ослободителните пресуди во земјата - со исклучок на авторските права, каде што регулирањето на организациите за колективно управување бара

понатамошно подобрување. Односно, мерките за авторски права се поригорозни.

6. Земајќи ги предвид четирите видови на иновации, претпријатијата во Македонија претежно воведуваат иновации во процесите, 22,8% и маркетинг иновации, 22,3%.

Вториот дел од извештајот ги презентира наодите од анкетата спроведена во Македонија. Обемот на истражувањето е да се испитаат анкетираниите "Иновативни активности на претпријатијата", а исто така и "Детерминанти на перформансите на иновациите" и идни перспективи.

"Фокус - сектори" за Македонија беа: Туризам, Агро-храна, Креативни индустрии (особено дизајнирање на облека и производство) и трговија на големо и мало.

Почнувајќи од структурата, поголемиот дел од компаниите кои беа дел од истражувањето беа претпријатија со помалку од 10 вработени (51%). Во однос на гледиштето на претпријатијата кон иновациите и креативноста, мнозинството се согласуваат дека креативноста е предуслов за иновации. Од друга страна, повеќе од 50% од претпријатијата се согласуваат дека иновацијата не е исто што и изумот, меѓутоа тие се согласуваат дека иновации во организација на претпријатијата е еднакво важна како иновација во производите или производството.

Во однос на видовите на иновации кои се спроведуваат во нивните претпријатија, повеќе од очигледно е дека маркетинг-иновациите се најупотребувани (45%).

Истражувањето, исто така, ги испитуваше можните "пречки / бариери" за низок ангажман во иновативните активности. Главните пречки што беа идентификувани се: недостаток на финансии, силна конкуренција на квалитетот на производот, репутација или бренд; високи трошоци за пристап до нови пазари, силна ценовна конкуренција и доминантен пазарен удел што го имаат конкурентите.

Имајќи ги предвид пречките за интензивни иновативни активности, претпријатијата исто така беа испитани за вештини потребни за надминување на пречките. Како што е наведено во табелата 2.3., Размислувањето и дејствувањето креативно, како и промовирањето на иновативната култура се главните потребни вештини.

Исто така, ги истраживме гледните точки на претпријатијата во однос на тоа кој и како треба овие вештини да ги пренесе. Речиси сите сектори се согласија дека самите компании треба да бидат иницијатори за иновативни активности. Покрај тоа, здобивањето на вештини, според испитаниците, треба да биде преку учење од добри примери како и “Лице в лице” тренинзи.

GREECE

CIDE NET Project’s Work Package 3: *“Innovation Needs and Potentials”* foresees the delivery of: “Reviews of Entrepreneurship Ecosystems in partner countries and Needs Analyses”.

The Work Package 3 – “Reviews and Analyses” deliverable for Greece consists of a National Report in two Parts: *“Part One – The Ecosystem for Enterprises’ Innovation”* and *“Part Two – Enterprises’ Innovation Activities – Performance, Skill Gaps and Needs Analyses”*.

In **Part One** the Report presents information and commentary on institutional, legal, technical and other aspects of the “environment / ecosystem” in which Greek enterprises operate.

Information has been derived from national or international sources, as well as from the partner’s own previous work and experience, while the authors have also contacted a number of Professional Associations and, by interviewing them, obtained their views and suggestions of Good Practices worthy to be considered.

In the recently published “European Innovation Scoreboard” (2017) Report, Greece is defined as a “moderately innovating country”, together with countries such as: Croatia, Hungary, Poland and Portugal. For all these countries innovation activity is lower than the EU average levels. For Greece in particular, following some improvements during the 2007-2013 period, innovation activity indicators decreased and reached 66% of EU average.

A series of country-specific indicators, presented and discussed in **Section 1.1**, allowing comparisons with other EU countries. A number of comments on some of these indicators may be made:

(a) Summary Innovation Index for Greece relatively to EU-28 average for 2010 and 2016, is characteristic of the country’s distance from EU average

(b) The overall adverse situation in terms of **entrepreneurship development**, is reflected in the corresponding low index of **“Opportunity-driven entrepreneurship”**

(c) **Venture capital expenditures** indicator remains at very low level and, furthermore, it has been decreasing.

(d) **“Innovators” index** has dropped by 20 percentage points between 2010 and 2016.

(e) The most characteristic indicator is the one related to low **“sales impact”** of whatever innovation activity is undertaken by Greek enterprises.

The comments presented in Section 1.1, were used in order to identify a number of crucial parts of the **Greek Innovation eco-system** and also to comment on the relatively weak and strong elements impacting, either as “obstacles” or “drivers/facilitators”, on innovation activity in Greece.

The Innovation sub-systems discussed in **Section 1.2**, are the following:

- The Educational System
- R&D activity expenditures
- Networking
- Funding
- Legislation and Regulation
- The Greek society’s approach to “innovation” and “innovators”

Generally speaking:

(a) The **Greek educational system** (Schools, HEIs, Research institutions) is not considered sufficiently competitive at an international scale and not effectively linked to the needs of Greek enterprises aiming at upgrading and maintaining international competitiveness.

(b) Public and Private sectors’ **R&D expenditure** is low

(c) **Links** between basic and applied research and between research and the marketplace are weak.

(d) **Funding** being made available to innovating enterprises, especially to small or medium sized ones and start-ups, is insufficient

(e) **Legislation and the Regulatory environment** is regarded as creating “obstacles” to innovation, rather than encouraging and facilitating it.

Finally, **Section 1.3** presents the main issues discussed during interviews conducted with representatives of organisations regarded as “stakeholders”, on basic elements of the Innovation Ecosystem in the respective countries.

The person(s) interviewed were asked his/her views on whether they regard the Innovation Ecosystem in their country as being SUPPORTIVE, FACILITATING, and APPRECIATIVE of enterprises' innovation activities.

The **Second Part** of the Report presents the findings of the Survey conducted in Greece. The scope of the survey, like those undertaken in all CIDE NET partner countries, is to investigate surveyed “enterprises' Innovation Activities” and also the “Determinants of Innovation Performance” and future Prospects.

The “focus sectors” for Greece were: Tourism, Agrofood, Creative industries (clothing design and production, in particular) and an additional country-specific sector (Commerce – retail and wholesale).

The number of enterprises surveyed with the use of a standardized (for all sectors in all partner countries) was 103, with most of the sample enterprises employing less than 10 persons. Together with the 10-19 employment size bracket, those employing less than 20 persons account for approximately 65% of the total sample.

Respondents were first given the option to indicate the extent of their “agreement”, by marking between 1 (“strongly disagree”) and 5 (“strongly agree”), a number of statements referring to basic notions of Innovation (**Section 2.2**). With the exception of the statement suggesting that “Innovation is only the responsibility of enterprises' R&D personnel”, for which the “composite” indicator is estimated at 2.21/4.00, indicating clear “disagreement”, for all other statements the corresponding values exceed 4.0/5.0. The specific finding is confirmed for all individual industries. Furthermore, the disagreement expressed for the specific statement mentioned above, confirms the importance that some types of enterprises' innovation activity for which non-technical staff is responsible, should also be seriously considered.

In **Section 2.3**, investigating the extent to which surveyed enterprises engage in specific types of innovative activities, the estimated average indicators for various types of innovation (i.e. products, processes, organizational, marketing), range from maximum 2.77/5.00, for enterprises in that part of Creative industries considered, to minimum 2.14/5.00 for Tourism, while for all four focus-sectors taken together the corresponding indicator is estimated at 2.47/5.00. These values suggest that for enterprises that participated in the survey, the extent of their engagement in any of the four types of innovation, ranges between “very little” and “moderate”.

Given this indication of rather low engagement in innovative activities, the survey also investigated probable “obstacles/barriers” that enterprises are confronted with (also in Section 2.3). “Shortages of qualified innovation-oriented personnel” seems

to be a major concern for enterprises in all industries. Other rather severe obstacles are related to shortages of other basic resources, such as finance and to adverse demand conditions, in both the home and foreign markets. For the latter in particular, cost for getting access to them, is considered prohibitive for many small Greek firms. For specific industries, there are of course other factors, such as price competition, or competition in general for Agrofood but mostly for enterprises in Commerce.

In **Section 2.4**, the survey proceeded, based on responses received, the type of skills considered most important for innovation. The “indicators of significance” are, on average (i.e. all skills, all industries), 4.31/5.00, implying that all of them are perceived as close to “very significant”, with marginal only differences among sectors (minimum 4.21/5.00 for Tourism, maximum 4.37/5.00 for Commerce). It is interesting to note that there are noticeable similarities among industries on how types of skills are ranked and, more specifically, which are the most significant skills, independently of sector. The “Top 5 Skills for Innovation” include: (a) “personal skills”, such as “to be able to think and act creatively” or “to be able to identify opportunities”, (b) other skills related to the person concerned being able to promote innovation within the firm, such as “to be able to communicate” or “to promote the enterprise’s innovation culture” or (c) some more technical skills, such as: “innovation cost-benefit analyses” or “to be able to monitor and evaluate the results of innovation”.

Finally, in **Section 2.5**, survey respondents were asked to express their preferences on how innovation supporting initiatives could be best organised. The messages derived are clear! Enterprises, despite the fact that their size may pose constraints on independently initiating innovation related projects, seem to favour schemes combining their own capabilities with those of Business representative organisations, such as Associations, Chambers of Commerce. In this context, Government-initiated schemes are, in relative terms, the least preferred! Elements which the enterprises would like to see being incorporated in the design of innovation related training programmes and in their respective delivery modes, are also apparent:

- Blending theory and applied knowledge
- Flexible (i.e. blended) delivery modes
- Periodic updating of training material and refreshment courses

ΕΠΙΤΕΛΙΚΗ ΣΥΝΟΨΗ

Στο έργο CIDE NET, το Πακέτο Εργασίας 3, με τίτλο: **«Ανάγκες Καινοτομίας και Δυνατότητες»**, προβλέπει τη σύνταξη και υποβολή Εκθέσεων με θέμα: **«Ανασκόπηση του Οικοσυστήματος για Καινοτομία στις χώρες εταίρους και Ανάλυση Αναγκών»**, για όλες τις χώρες που συμμετέχουν στο έργο (Ελλάδα, Βουλγαρία, Κύπρος, FYROM, Ιταλία και Πορτογαλία).

Το παραδοτέο για την Ελλάδα αποτελείται από μια Εθνική Έκθεση, με δύο Μέρη: **«Μέρος Πρώτο – Το Οικοσύστημα για Καινοτομία Επιχειρήσεων»** και **«Μέρος Δεύτερο – Δραστηριότητες Καινοτομίας – Επιδόσεις, Κενά δεξιοτήτων και Ανάλυση Αναγκών»**.

Στο **Πρώτο Μέρος** της η Έκθεση παρουσιάζει πληροφορίες και σχόλια για το θεσμικό, νομικό, τεχνικό «περιβάλλον – οικοσύστημα» στο οποίο λειτουργούν οι ελληνικές επιχειρήσεις.

Οι πληροφορίες προέρχονται από Εθνικές και διεθνείς πηγές, καθώς και από προηγούμενες δραστηριότητες και εμπειρίες των εταίρων, ενώ οι συγγραφείς πραγματοποίησαν επίσης επαφές με επαγγελματικές οργανώσεις και, μέσω συνεντεύξεων, αντλήσαν απόψεις και συστάσεις για έναν αριθμό θεμάτων, σχετικών πάντα το αντικείμενο του έργου.

Στην πρόσφατα δημοσιευμένη Έκθεση «European Innovation Scoreboard” (2017), η Ελλάδα ορίζεται ως «χώρα μέτριας καινοτομίας», μαζί με άλλες χώρες, όπως η Κροατία, η Ουγγαρία, η Πολωνία και η Πορτογαλία. Στις χώρες αυτές, η καινοτομία, ως δραστηριότητα, βρίσκεται σε επίπεδο χαμηλότερο από τον Μέσο για την Ευρωπαϊκή Ένωση. Ειδικά στην Ελλάδα, μετά από κάποιες βελτιώσεις στην περίοδο 2007-2013, οι Δείκτες Καινοτομίας μειώθηκαν και έφθασαν να είναι σήμερα στο 66% του Ευρωπαϊκού Μέσου Ορού.

Μια σειρά Δεικτών για την Ελλάδα παρουσιάζονται και σχολιάζονται στην **Ενότητα 1.1** της Έκθεσης, επιτρέποντας συγκρίσεις με άλλες χώρες μέλη της ΕΕ. Αξίζει να αναφερθούμε σε ορισμένους από τους Δείκτες αυτούς:

- (α) Ο **Γενικός Δείκτης Καινοτομίας** για την Ελλάδα, σε σύγκρισή με τον Μέσο ΕΕ-28 για το 2010 και το 2016, είναι χαρακτηριστικός της απόστασης που υπάρχει.
- (β) Η γενικευμένα αρνητική κατάσταση στο θέμα της **Ανάπτυξης Επιχειρηματικότητας** είναι εμφανής στον χαμηλό **Δείκτη «Επιχειρηματικότητας Ευκαιρίας»**

- (γ) Ο Δείκτης «Δαπανών Κεφαλαίων Υψηλού Επιχειρηματικού Κινδύνου» παραμένει σε χαμηλά επίπεδα και παρουσιάζει πτωτική πορεία
- (δ) Ο Δείκτης «Καινοτόμων Φορέων» μειώθηκε, μεταξύ 2010 και 2016, κατά 20 ποσοστιαίες μονάδες
- (ε) Ο πλέον χαρακτηριστικός πάντως Δείκτης είναι αυτός που εκφράζει την χαμηλή «Επίπτωση στις Πωλήσεις» οποιασδήποτε καινοτομίας επιχειρείται από ελληνικές επιχειρήσεις.

Τα σχόλια της Ενότητας 1.1, αξιοποιήθηκαν προκειμένου να εντοπιστεί ένα αριθμός κρίσιμων περιοχών («Υποσυστημάτων») του Ελληνικού γενικού «Οικο-συστήματος για την Καινοτομία» και για να σχολιαστεί η κατάσταση σε ορισμένους σχετικά ισχυρών ή αδύναμων στοιχείων που επηρεάζουν, ως «ενισχυτές» ή ως «εμπόδια» αντίστοιχα, την καινοτομική δραστηριότητα στην Ελλάδα.

Τα Υποσυστήματα που σχολιάζονται στην **Ενότητα 1.2**, είναι τα εξής:

- Το Εκπαιδευτικό Σύστημα
- Οι δαπάνες για Έρευνα και Ανάπτυξη (R&D)
- Οι Δικτυώσεις των επιχειρήσεων
- Το σύστημα Χρηματοδότησης
- Νομοθεσία και Ελεγκτικοί Μηχανισμοί
- Η γενική αντιμετώπιση, από την κοινή γνώμη, της «καινοτομίας» και των «καινοτόμων».

Σε γενικές γραμμές:

- (α) Το **Εκπαιδευτικό Σύστημα** στην Ελλάδα (Σχολική και Τριτοβάθμια Εκπαίδευση) δεν θεωρείται επαρκώς ανταγωνιστικό σε διεθνή κλίμακα και απουσιάζει η αποτελεσματική διασύνδεση με τις ανάγκες των επιχειρήσεων οι οποίες επιδιώκουν και αναβαθμίσουν και να διατηρήσουν διεθνή ανταγωνιστικότητά.
- (β) Οι δαπάνες για Έρευνα και Ανάπτυξη, από τον Δημόσιο, αλλά και από τον Ιδιωτικό τομέα, είναι χαμηλές
- (γ) Η διασύνδεση Βασικής με Εφαρμοσμένη έρευνα και μεταξύ έρευνας και «αγοράς» είναι περιορισμένη
- (δ) Η χρηματοδότηση καινοτόμων επιχειρήσεων, ιδιαίτερα των μικρού και μεσαίου μεγέθους, θεωρείται ανεπαρκής
- (ε) Το Θεσμικό περιβάλλον θεωρείται ότι αποτελεί μάλλον «εμπόδιο» στην καινοτομική δραστηριότητα, παρά παράγοντας ενθάρρυνσης και διευκόλυνσής της.

Στην **Ενότητα 1.3** παρουσιάζονται τα κύρια σημεία που συζητήθηκαν στη διάρκεια συνεντεύξεων με εκπροσώπους οργανισμών, σχετικά με το Περιβάλλον για Καινοτομία στην Ελλάδα. Από τα άτομα με τα οποία πραγματοποιήθηκαν οι

συνεντεύξεις αυτές, ζητήθηκε να εκφράσουν άποψη για το κατά πόσο το «περιβάλλον» αυτό μπορεί να θεωρηθεί ότι ΥΠΟΣΤΗΡΙΖΕΙ, ΔΙΕΥΚΟΛΥΝΕΙ και ΕΠΙΒΡΑΒΕΥΕΙ τις καινοτομικές δράσεις των επιχειρήσεων.

Στο **Δεύτερο Μέρος** της Έκθεσης παρουσιάζονται τα ευρήματα ειδικής έρευνας που διεξήχθη στην Ελλάδα, Σκοπός της ήταν, όπως και στις άλλες χώρες που συμμετέχουν στο έργο CIDE NET, να διερευνηθούν οι καινοτομικές δραστηριότητες ενός αριθμού επιχειρήσεων, όπως επίσης και οι προσδιοριστικοί παράγοντες των «επιδόσεων στην καινοτομία» καθώς και των προοπτικών που διαμορφώνονται.

Οι κλάδοι στους οποίους η ελληνική έρευνα εστιάστηκε, είναι ο **Αγρο-διατροφικός**, ο **Τουρισμός**, οι **Δημιουργικές Βιομηχανίες** και το **Εμπόριο** (Χονδρικό και Λιανικό).

Στο δείγμα της έρευνας, που πραγματοποιήθηκε με, τυποποιημένο για όλες τις χώρες εταίρους, Ερωτηματολόγιο, περιλαμβάνονται 103 επιχειρήσεις, οι περισσότερες από τις οποίες απασχολούν λιγότερα από 10 άτομα. Αν συνυπολογιστούν και αυτές των 10-19 ατόμων, οι επιχειρήσεις με λιγότερα των 20 ατόμων αποτελούν το 65% περίπου του δείγματος.

Στους ερωτώμενους δόθηκε καταρχήν η ευκαιρία (**Ενότητα 2.2**) να δηλώσουν (σε κλίμακα βαθμολογίας 1-4), την «ένταση συμφωνίας» τους με μια σειρά «δηλώσεων» αναφορικά με βασικές έννοιες σχετικών με την Καινοτομία. Με εξαίρεση την «δήλωση» ότι «η Καινοτομία αποτελεί αποκλειστική ευθύνη των στελεχών στα τμήματα έρευνας των επιχειρήσεων», για την οποία ο σταθμισμένος «Δείκτης Βαθμού Συμφωνίας», από το σύνολο των επιχειρήσεων/κλάδων, ήταν μόνο 2.21/4.00, που σημαίνει σαφή διαφωνία, για όλες τις άλλες «δηλώσεις» οι αντίστοιχοι Δείκτες υπερέβησαν το 4.0/5.0. Το συγκεκριμένο εύρημα επιβεβαιώνεται και σε επίπεδο επιμέρους κλάδων, γεγονός το οποίο σημαίνει ότι καινοτομικές δραστηριότητες στις οποίες εμπλέκονται διοικητικά η και άλλα (πλην των αμιγώς τεχνικών) στελέχη και τμήματα των επιχειρήσεων, θα πρέπει και αυτές να λαμβάνονται σοβαρά υπόψιν.

Στην **Ενότητα 2.3**, εξετάστηκε η ένταση με την οποία οι επιχειρήσεις ασχολούνται με συγκεκριμένους τύπους Καινοτομίας. Η μέση ένταση για τους διάφορους αυτούς τύπους (προϊόντος, μεθόδων παραγωγής, οργανωτικές, marketing) κυμαίνεται μεταξύ 2.77/5.00 για τις «δημιουργικές βιομηχανίες» που εξετάστηκαν και 2.14/5.00 στον Τουρισμό και, κατά μέσον όρο, ο σχετικός Δείκτης εκτιμήθηκε στο 2.47/5.00. Προκύπτει επομένως ότι, για τουλάχιστον τις επιχειρήσεις και τους κλάδους που ερευνήθηκαν, η ενασχόλησή τους, σε οποιοδήποτε από τους 4 τύπους Καινοτομίας, είναι μεταξύ του «πολύ περιορισμένη» έως, το πολύ, «μέτριας έντασης».

Με δεδομένη την γενική διαπίστωση σχετικά χαμηλής εμπλοκής των επιχειρήσεων σε δραστηριότητες καινοτομίας, διερευνήθηκαν (επίσης στην Ενότητα 2.3), τα πιθανά «εμπόδια» και οι «ανασταλτικοί παράγοντες» που οι επιχειρήσεις αντιμετωπίζουν. Οι «ελλείψεις σε κατάλληλο και με προσανατολισμένο προς την Καινοτομία, προσωπικό» αναδεικνύεται ως βασικός ανασταλτικός παράγοντας, ανεξαρτήτως κλάδου. Άλλα σχετικά σοβαρά εμπόδια έχουν σχέση με ελλείψεις σε άλλους συντελεστές, όπως η χρηματοδότηση και η «αρνητική κατάσταση στις αγορές», την εθνική, αλλά και στο εξωτερικό. Ειδικά για το τελευταίο, το «κόστος πρόσβασης σε ξένες αγορές» θεωρείται απαγορευτικό, ιδίως για επιχειρήσεις μικρού/μεσαίου μεγέθους. Για επιμέρους κλάδους, επενεργούν βέβαια και άλλοι παράγοντες, όπως π.χ. ο ανταγωνισμός τιμών και, γενικά, ο ανταγωνισμός, στους κλάδους Αγρο-διατροφής και, κυρίως, το Εμπόριο.

Με βάση τις παραπάνω διαπιστώσεις, η έρευνα προχώρησε (**Ενότητα 2.4**) σε αναζήτηση συγκεκριμένων δεξιοτήτων που θεωρούνται, από τους εργοδότες, απαραίτητες προκειμένου να αναλαμβάνονται καινοτομικές δραστηριότητες οποιουδήποτε τύπου. Μεταξύ 10 διαφορετικών τύπων δεξιοτήτων, ο Μέσος (όλες οι δεξιότητες, όλοι οι κλάδοι) Δείκτης Σημαντικότητας εκτιμήθηκε σε 4.31/5.00, ένδειξη «ιδιαίτερα υψηλής Σημαντικότητας», με οριακές μόνο διαφοροποιήσεις μεταξύ κλάδων (ελάχιστο: 4.21 στον Τουρισμό, μέγιστο: 4.37 στο Εμπόριο). Είναι ενδιαφέρον να σημειωθεί ότι παρατηρούνται έντονες αντιστοιχίες στο πως ορισμένοι τύποι δεξιοτήτων ιεραρχούνται στους επιμέρους κλάδους, η, με άλλα λόγια, στο ποιες θεωρούνται ότι είναι οι πλέον σημαντικές δεξιότητες, ανεξαρτήτως κλάδου. Οι «**5 Πρώτες – Top 5 – Δεξιότητες για Καινοτομία**» περιλαμβάνουν: (α) «προσωπικές δεξιότητες», όπως π.χ. το «να είναι κάποιος σε θέση να σκέφτεται και να ενεργεί δημιουργικά» η «να μπορεί να εντοπίζει ευκαιρίες», (β) άλλες δεξιότητες που επιτρέπουν στον συγκεκριμένο εργαζόμενο να μπορεί να προωθεί την Καινοτομία στο εσωτερικό της επιχείρησης, όπως π.χ. «να είναι επικοινωνιακός» η «να προωθεί καλλιέργεια καινοτομικής κουλτούρας στην επιχείρηση», η (γ) κάποιες περισσότερο τεχνικές δεξιότητες, όπως «ικανότητα για αναλύσεις κόστους-οφέλους» η «ικανότητα παρακολούθησης και αξιολόγησης των αποτελεσμάτων της Καινοτομίας».

Τέλος, στην **Ενότητα 2.5**, ζητήθηκε από τους συμμετέχοντες στην έρευνα να τοποθετηθούν με τις προτιμήσεις τους σχετικά με τον τρόπο που θα έπρεπε να οργανωθούν και να υλοποιηθούν πρωτοβουλίες που πιθανώς θα αναλαμβάνονταν για προώθηση της Καινοτομίας. Τα «μηνύματα» που προέκυψαν είναι σαφή! Οι επιχειρήσεις, παρά τους περιορισμούς που το μέγεθός τους συνεπάγεται για αυτοδύναμες πρωτοβουλίες, εμφανίζονται να προτιμούν να βασίζονται στις δικές τους δυνάμεις και στις δυνάμεις των επαγγελματικών τους Ενώσεων (π.χ. Κλαδικοί

Σύνδεσμοι, Επιμελητήρια). Με την έννοια αυτή, αντίστοιχες Κρατικές πρωτοβουλίες, προτιμώνται λιγότερο! Στοιχεία τα οποία εμφανίζονται να ευνοούνται από τις επιχειρήσεις, ως προς τον σχεδιασμό και την υλοποίηση εκπαιδευτικών προγραμμάτων σχετικών με την Καινοτομία, είναι τα εξής:

- Μεικτά προγράμματα θεωρητικής και εφαρμοσμένης γνώσης
- Ευέλικτες μορφές υλοποίησης εκπαιδεύσεων
- Προγράμματα των οποίων το περιεχόμενο και το σχετικό εκπαιδευτικό υλικό θα επικαιροποιείται περιοδικά.

ANNEX B1

SURVEYS RESULTS

(All Partner Countries, All Surveyed Industries)

Question 1: Survey sample size (All surveyed industries)

Country	number	%
Greece	103	22,89
Bulgaria	100	22,22
FYROM	81	18,00
Albania	77	17,11
Cyprus	89	19,78
Total	450	100

Question 2: Survey sample sectoral composition (All partner countries)

	number	%
Agro-food	73	16,22%
Tourism	123	27,33%
Creative industries	41	9,11%
Retail and wholesale commerce	73	16,22%
Other	140	31,11%
Total	450	100%

Question 3: Survey respondents' size structure (All partner countries, all industries)

Number of employees	number	%
Less than 10	177	39,33%
10-19	89	19,78%
20-49	83	18,44%
50-99	54	12,00%
More than 100	47	10,44%
Total	450	100%

Question 4: Can you please indicate whether you Agree or Disagree with the following statements (scale: 1-5) – All partner countries, all surveyed industries

	Strongly disagree	Disagree somewhat	Neither agree nor disagree	Agree somewhat	Strongly agree	Indicator*
1. Innovation is not the same as invention	18	39	58	125	210	4,04
2. “Innovation” in how an enterprise is organised, is equally important with innovation in the production of products or services	6	30	63	144	207	4,15
3. “Innovation”, in an enterprise, should be responsibility of the technical staff and researchers only	119	106	70	87	68	2,73
4. Creativity is a prerequisite of Innovation	6	23	57	156	198	4,18
						3,77

Question 5: Is your enterprise engaged in Innovation activities of any of the following four types and to what extent (scale: 1-4) – All partner countries, all surveyed industries

	No	Yes, very little	Yes, moderately	Yes, a lot	Indicator*
1. Product Innovation	110	85	138	104	2,54
2. Process innovation	90	95	162	90	2,58
3. Organisational innovation	65	112	168	92	2,66
4. Marketing innovation	55	98	148	137	2,84
					2,65

Question 6: How important is each of the following factors as an obstacle or constraint to more intensive innovation activity by your enterprise (scale: 1-5) – All partner countries, all surveyed industries

All sectors	Insignificant	Rather insignificant	Neither significant, nor insignificant	Rather significant	Very significant	Indicator*
1.Strong price competition	14	34	42	208	140	3,97
2.Strong competition on product quality , reputation or brand	19	33	58	180	148	3,92
3.Lack of demand	21	38	89	167	123	3,76
Innovations by competitors	23	46	53	183	132	3,81
4.Dominant market share held by competitors	17	44	56	200	121	3,83
5.Lack of adequate finance	6	34	60	169	169	4,05
6.High cost of access to new markets	12	25	65	188	148	3,99
7.High cost of meeting government regulations or legal requirements	9	57	79	153	140	3,82
8.Lack of qualified technical personnel	24	71	53	164	126	3,68
9.Lack of qualified innovation oriented personnel	12	38	62	191	135	3,91
					Average*	3,88

Question 7: To the extent that “qualified personnel” is important for your enterprise’s continuing and/or intensified innovation activity, what should be its main skills? (scale:1-5) – All partner countries, all surveyed industries

All sectors	Insignificant	Rather insignificant	Neither significant, nor insignificant	Rather significant	Very significant	Indicator*
1. To be able to distinguish between innovation and inventions and between types of innovation suitable for the enterprise	13	26	48	208	143	4,01
2. To be able to promote "Innovation culture" within the company	2	14	42	185	195	4,27
3. To be able to think and act creatively	1	10	25	172	230	4,42
4. To know how to identify opportunities for innovation and conduct “cost – benefit” analyses	4	10	49	177	198	4,27
5. To be knowledgeable of sources of funding for innovation and funding related procedures	6	27	68	186	151	4,03
6. To be able to communicate with other employees and develop synergies	2	5	34	196	201	4,34
7. To be able to communicate with the enterprise’s Management and promote innovation Proposals	2	9	34	201	192	4,31
8. To know how to monitor and evaluate the results of innovation	1	15	56	162	204	4,26
9. To be able to network with	5	24	60	183	166	4,10

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other enterprises (national and/or foreign) and negotiate joint innovation initiatives						
10. To know how Intellectual Property Rights may be protected	7	25	79	174	153	4,01
					Average*	4,20

Question 8: Given that, as it is generally believed, certain types of training programmes could contribute to upgrading staff skills and innovation-related skills in particular, indicate whether you agree or disagree with the following statements (scale:1-5) – All partner countries, all surveyed industries

All sectors	Strongly disagree	Disagree somewhat	Neither agree nor disagree	Agree somewhat	Strongly agree	Indicator*
1. The initiative for such programs should be taken by the Government	18	48	83	127	162	3,84
2. The initiative for such programs should be taken by Enterprises' Collective Organizations (e.g. Associations, Chambers of Commerce, etc.)	8	21	65	155	189	4,13
3. The initiative for such programs should be taken by the enterprises themselves	4	21	60	136	217	4,24
4. Training should consist of both theoretical and applied knowledge.	1	6	30	126	275	4,53
5. Good Practices and “learning from others” are effective training methods.	1	8	52	163	214	4,33
6. Training should be combined with mentoring	3	10	60	160	205	4,26
7. Training sessions must be periodically repeated	13	16	70	158	172	4,07
8. Enterprises should set up their own	31	35	98	145	129	3,70

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Innovation Departments						
9. Employees attending such Innovation promotion- related training will have their overall performance improved and this should be regarded as sufficient incentive for them to actively participate	2	15	46	189	186	4,24
10. Face to face training must be combined with other forms of training that could facilitate flexibility as regards attendance (e.g. synchronous and asynchronous e-learning, studying of case studies over the Internet, etc.)	3	17	46	158	214	4,29
					Average*	4,16

**For explanation on the “Indicator” estimation method, see Annex B2 below.*

ANNEX B2 - “Skill Gaps and Training Needs” – Survey Results (Questions 4 – 8)

ALL 5 PARTNER COUNTRIES - SYNTHESIS

Questions*		Partner countries - Number of responses & “Intensity” Indicators** - All industries					
		ALL 5 countries [450]	ALBANIA [77]	BULGARIA [100]	CYPRUS [89]	FYROM [81]	GREECE [103]
4. Can you please indicate whether you Agree or Disagree with the following statements (scale: 1-5)							
4.1	Innovation is not the same as invention	4.04	3.75	4.14	4.17	4.08	4.03
4.2	“Innovation” in how an enterprise is organized, is equally important with innovation in the production of products or services	4.14	4.04	3.97	4.22	4.18	4.30
4.3	"Innovation", in an enterprise, should be responsibility of the technical staff and researchers only	2.61	3.08	3.17	2.58	2.03	2.21
4.4	Creativity is a prerequisite of Innovation	4.14	3.68	4.23	4.18	4.32	4.23
Average - all statements***		3.74	3.64	3.88	3.79	3.65	3.69
5. Is your enterprise engaged in Innovation activities of any of the following four types and to what extent (scale: 1-4)							
5.1	Product Innovation	2.54	2.66	2.61	2.51	2.37	2.55
5.2	Process innovation	2.58	2.71	2.75	2.57	2.28	2.56
5.3	Organisational innovation	2.66	2.84	2.83	2.73	2.54	2.40
5.4	Marketing innovation	2.85	3.13	2.83	2.89	3.16	2.36
Average – all types of innovation***		2.66	2.84	2.75	2.68	2.58	2.47
6. How important is each of the following factors as an obstacle or constraint to more intensive innovation activity by your enterprise (scale: 1-5)							
6.1	Strong price competition	3.92	3.77	4.15	3.70	4.29	3.69
6.2	Strong competition on product quality , reputation or brand	3.93	3.49	4.15	3.84	4.38	3.77
6.3	Lack of demand	3.76	3.38	3.69	3.64	4.03	3.99

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6.4	Innovations by competitors	3.81	3.29	4.02	3.85	4.12	3.71
6.5	Dominant market share held by competitors	3.84	3.36	4.22	3.72	4.17	3.68
6.6	Lack of adequate finance	4.05	3.79	4.03	3.83	4.40	4.17
6.7	High cost of access to new markets	3.99	3.62	4.03	3.87	4.33	4.08
6.8	High cost of meeting government regulations or legal requirements	3.82	3.48	3.80	3.76	3.92	4.05
6.9	Lack of qualified technical personnel	3.67	4.13	3.49	3.65	3.11	3.97
6.10	Lack of qualified innovation oriented personnel	3.91	4.08	3.89	3.82	3.70	4.05
Average – all obstacles / constraints***		3.88	3.64	3.95	3.77	4.04	3.94
7. To the extent that “qualified personnel” is important for your enterprise’s continuing and/or intensified innovation activity, what should be its main skills? (scale:1-5)							
7.1	To be able to distinguish between innovation and inventions and between types of innovation suitable for the enterprise	4.00	3.71	3.95	4.06	4.03	4.21
7.2	To be able to promote "Innovation culture" within the company	4.27	4.22	4.13	4.15	4.41	4.43
7.3	To be able to think and act creatively	4.41	4.38	4.15	4.35	4.54	4.63
7.4	To know how to identify opportunities for innovation and conduct “cost – benefit” analyses	4.26	4.09	4.10	4.21	4.43	4.46
7.5	To be knowledgeable of sources of funding for innovation and funding related procedures	4.02	4.01	3.91	4.07	4.04	4.08
7.6	To be able to communicate with other employees and develop synergies	4.34	4.40	4.44	4.22	4.39	4.28
7.7	To be able to communicate with the enterprise’s Management and promote innovation Proposals	4.30	4.30	4.15	4.18	4.43	4.46
7.8	To know how to monitor and evaluate the results of innovation	4.25	4.25	3.86	4.24	4.60	4.37
7.9	To be able to network with other enterprises (national and/or foreign) and negotiate joint innovation initiatives	4.10	4.10	4.26	4.01	4.04	4.07
7.10	To know how Intellectual Property Rights may be protected	4.00	4.12	3.83	3.85	4.16	4.09
Average – all types of skills***		4.20	4.16	4.08	4.14	4.30	4.31
8. Given that, as it is generally believed, certain types of training programmes could contribute to upgrading staff skills and innovation-related skills in particular, indicate whether you agree or disagree with the following statements (scale:1-5)							
8.1	The initiative for such programs should be taken by the Government	3.84	4.17	4.03	3.31	4.41	3.42

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8.2	The initiative for such programs should be taken by Enterprises’ Collective Organizations (e.g. Associations, Chambers of Commerce, etc.)	4.13	4.38	4.16	3.83	4.39	3.98
8.3	The initiative for such programs should be taken by the enterprises themselves	4.23	4.26	4.22	3.96	4.55	4.22
8.4	Training should consist of both theoretical and applied knowledge.	4.53	4.48	4.63	4.30	4.49	4.69
8.5	Good Practices and “learning from others” are effective training methods.	4.33	4.34	4.59	4.25	4.53	4.00
8.6	Training should be combined with mentoring	4.26	4.22	4.16	4.27	4.41	4.26
8.7	Training sessions must be periodically repeated	4.03	4.31	3.95	4.19	3.37	4.26
8.8	Enterprises should set up their own Innovation Departments	3.70	3.60	3.68	3.83	3.33	3.96
8.9	Employees attending such Innovation promotion- related training will have their overall performance improved and this should be regarded as sufficient incentive for them to actively participate	4.24	4.17	4.36	4.03	4.37	4.25
8.10	Face to face training must be combined with other forms of training that could facilitate flexibility as regards attendance (e.g. synchronous and asynchronous e-learning, studying of case studies over the Internet, etc.)	4.28	4.29	4.19	4.15	4.50	4.31
Average – all training types / delivery modes***		4.16	4.22	4.20	4.01	4.23	4.14

Explanatory notes:

*: For precise wording of Questions, see Survey’s Questionnaire (Annex C)

**: The value of an “Average Intensity Indicator” is calculated by weighting the consecutive indicators of importance or preference on the “scale” 1-5 or 1-4 (for Question 5) with the corresponding relative frequencies of responses. “Intensity” should be interpreted according to the content of each Question.

***: Similarly to previous note, this Average is calculated for the total responses received for all options offered as potential answers in each Question.

ANNEX C

SURVEY’S QUESTIONNAIRE

"CIDE-NET" Project Survey

"CIDE-NET" Project Survey

The Survey is being conducted in the framework of "Creative and Innovation Driven Enterprises' Network - CIDE NET" project.

The project is being implemented within the frame of Interreg Balkan Mediterranean Programme and is co-funded by the European Union and national funds of the participating countries.

The scope of the survey is to identify the enterprises' needs and define obstacles as regards Innovation and Creativity. The conclusions of the survey will be used for the development of an Innovation Training & Mentoring Program.

All interested companies' representatives will be able to have access to it either in the form of e-learning or in the form of blended learning which will be accompanied by customized mentoring support.

Thank you in advance for your precious time devoted for answering the questionnaire.
All replies will remain anonymous and will be treated with confidentiality by authorized personnel only.

* Απαιτείται

1. Respondent's country of origin *

Επιλογή



2. In which of the following activities does your enterprise operate mainly? *

- ☐ 1. Agro-food (e.g. production, processing and packaging of food products with raw materials from agriculture, livestock and fisheries)
- ☐ 2. Tourism
- ☐ 3. Creative industries (e.g. handcrafts, textile / footwear industry, etc.)
- ☐ 4. Cultural industries (e.g. video games, TV & radio, film & video, etc.)
- ☐ 5. Logistics
- ☐ 6. Services (i.e. financial, ship-management, security, educational, legal services, etc.)
- ☐ 7. Food & beverages
- ☐ 8. Retail and wholesale commerce
- ☐ Άλλο:

3. How many people does your company employ *

- ☐ 1. Less than 10 employees
- ☐ 2. 10-19 employees
- ☐ 3. 20-49 employees
- ☐ 4. 50-99 employees
- ☐ 5. more than 100 employees

"CIDE-NET" Project Survey

4. Can you please indicate whether you Agree or Disagree with the following statements? *

	1. Strongly disagree	2. Disagree somewhat	3. Neither agree nor disagree	4. Agree somewhat	5. Strongly agree
1. Innovation is not the same as invention	☐	☐	☐	☐	☐
2. "Innovation" in how an enterprise is organised, is equally important with innovation in the production of products or services	☐	☐	☐	☐	☐
3. "Innovation", in an enterprise, should be responsibility of the technical staff and researchers only	☐	☐	☐	☐	☐
4. Creativity is a prerequisite of Innovation	☐	☐	☐	☐	☐

3/9

5. Is your enterprise engaged in Innovation activities of any of the following four types and to what extent? *

Product innovation: A product innovation is the market introduction of a new or significantly improved good or service with respect to its capabilities, user friendliness, components or sub-systems. Product innovations (new or improved) must be new to your enterprise, but they do not need to be new to your market. Product innovations could have been originally developed by your enterprise or by other enterprises or institutions. Process innovation: Process innovation is the implementation of a new or significantly improved production process, distribution method, or supporting activity. Organisational innovation: An organisational innovation is a new organisational method in your enterprise's business practices (including knowledge management), workplace organisation or external relations that has not been previously used by your enterprise. Marketing innovation: Marketing innovation refers to the implementation of a new marketing method that includes significant changes in the design or packaging of products, their positioning, promotion or pricing.

	1. No	2. Yes, very little	3. Yes, moderately	4. Yes, a lot
1. Product innovation	☐	☐	☐	☐
2. Processes innovation	☐	☐	☐	☐
3. Organisational innovation	☐	☐	☐	☐
4. Marketing innovation	☐	☐	☐	☐

6. How important is each of the following factors as an obstacle or constraint to more intensive innovation activity by your enterprise? *

	1. Insignificant	2. Rather insignificant	3. Neither significant nor insignificant	4. Rather significant	5. Very significant
1. Strong price competition	☐	☐	☐	☐	☐
2. Strong competition on product quality, reputation or brand	☐	☐	☐	☐	☐
3. Lack of demand	☐	☐	☐	☐	☐
4. Innovations by competitors	☐	☐	☐	☐	☐
5. Dominant market share held by competitors	☐	☐	☐	☐	☐
6. Lack of adequate finance	☐	☐	☐	☐	☐
7. High cost of access to new markets	☐	☐	☐	☐	☐
8. High cost of meeting government regulations or legal requirements	☐	☐	☐	☐	☐
9. Lack of qualified technical personnel	☐	☐	☐	☐	☐
10. Lack of qualified innovation oriented personnel	☐	☐	☐	☐	☐

4/18/2018

“CIDE-NET” Project Survey

7. To the extent that “qualified personnel” is important for your enterprise’s continuing and/or intensified innovation activity, what should be its main skills? *

	1. Insignificant	2. Rather insignificant	3. Neither significant nor insignificant	4. Rather significant	5. Very significant
1. To be able to distinguish between innovation and inventions and between types of innovation suitable for the enterprise	☐	☐	☐	☐	☐
2. To be able to promote “Innovation culture” within the company	☐	☐	☐	☐	☐
3. To be able to think and act creatively	☐	☐	☐	☐	☐
4. To know how to identify opportunities for innovation and conduct “cost – benefit” analyses	☐	☐	☐	☐	☐
5. To be knowledgeable of sources of funding for innovation and funding related procedures	☐	☐	☐	☐	☐
6. To be able to communicate with other employees and develop synergies	☐	☐	☐	☐	☐
7. To be able to communicate with the enterprise’s Management and promote innovation Proposals	☐	☐	☐	☐	☐
8. To know how to monitor and evaluate the results of innovation	☐	☐	☐	☐	☐
9. To be able to	☐	☐	☐	☐	☐

6/9

"CIDE-NET" Project Survey

network with
other enterprises
(national and/or
foreign) and
negotiate joint
innovation
initiatives

10. To know how
Intellectual
Property Rights
may be
protected



4/18/2018

"CIDE-NET" Project Survey

8. Given that, as it is generally believed, certain types of training programmes could contribute to upgrading staff skills and innovation- related skills in particular, indicate whether you agree or disagree with the following statements? *

	1. Strongly disagree	2. Disagree somewhat	3. Neither agree nor disagree	4. Agree somewhat	5. Strongly agree
1. The initiative for such programmes should be taken by the Government	☐	☐	☐	☐	☐
2. The initiative for such programmes should be taken by Enterprises' Collective Organisations (e.g. Associations, Chambers of Commerce, etc.)	☐	☐	☐	☐	☐
3. The initiative for such programmes should be taken by the enterprises themselves	☐	☐	☐	☐	☐
4. Training should consist of both theoretical and applied Parts.	☐	☐	☐	☐	☐
5. Good Practices and "learning from others" are effective training methods.	☐	☐	☐	☐	☐
6. Training should be combined with mentoring	☐	☐	☐	☐	☐
7. Training sessions must be periodically repeated	☐	☐	☐	☐	☐
8. Enterprises should set up their own Innovation Departments	☐	☐	☐	☐	☐

8/9

2018

"CIDE-NET" Project Survey

9. Employees attending such Innovation promotion-related training will have their overall performance improved and this should be regarded as sufficient incentive for them to actively participate

☐ ☐ ☐ ☐ ☐

10. Face to face training must be combined with other forms of training that could facilitate flexibility as regards attendance (e.g. synchronous and asynchronous e-learning, studying of case studies over the Internet, etc.)

☐ ☐ ☐ ☐ ☐

9. Would you be interested to participate in CIDE NET training sessions organised in your country (e.g. blended learning, customized mentoring services, etc.)? *

- ☐ 1. Yes
- ☐ 2. No
- ☐ 3. Maybe

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