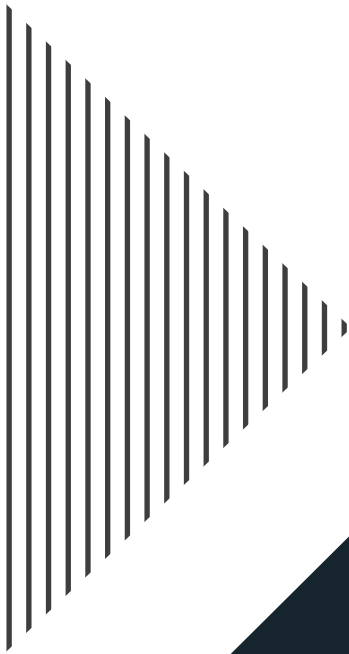


INKA2





INKA2



The INKA mapping project aims to identify and describe the key players, structures, mechanisms and barriers to the growth of the Czech Republic's innovation capacity. Its project findings will provide a basis for setting up new interventions to support applied research and innovation and for evaluating the implementation and impact of existing programmes in order to strengthen regional competitiveness and the competitiveness of regional actors.

**NUMBER
OF COMPANIES
VISITED**

711

**TOTAL NUMBER
OF EMPLOYEES
IN 2017**

203 THS.

**R&D
EXPENDITURE**

**EXPORTS
IN 2017**

**TOTAL SALES OF THE
VISITED COMPANIES
IN 2017**

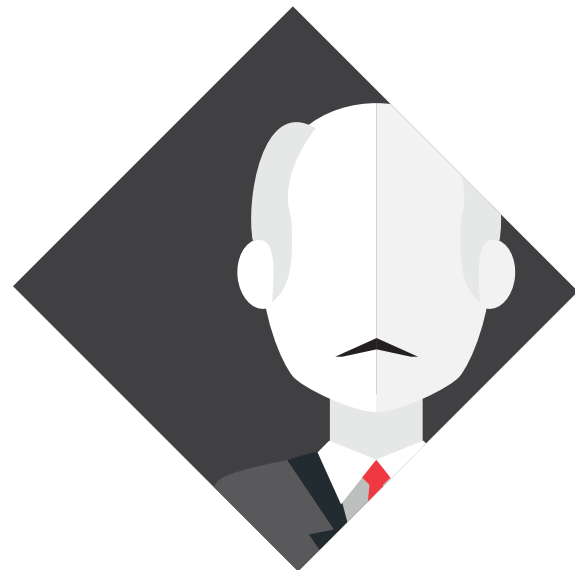
CZK 1 268 BIL.

CZK 24 BIL.

CZK 690 BIL.

Aspirations to be a Change Leader

A company's behaviour is significantly influenced by its overall business aspirations which define the focus and limitations of its innovative efforts.

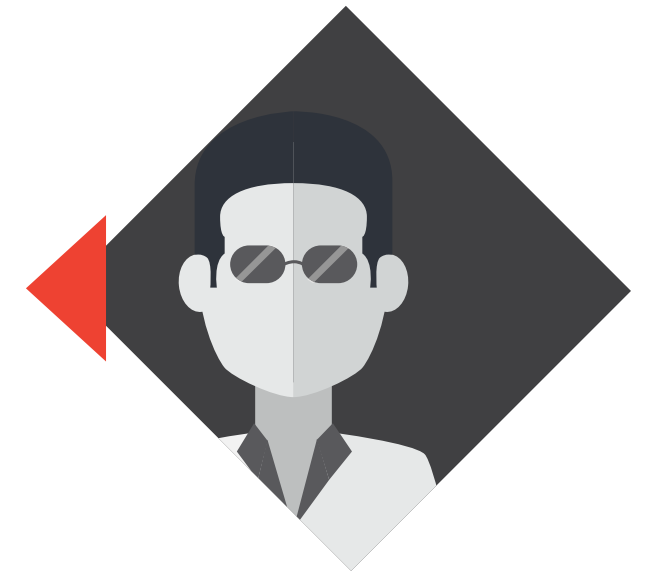


Leader

- aspires to be a change leader in the global market
- invests in finding and testing new solutions on the market

Follower

- stays as close to the Market Leaders as possible
- wants to be able to respond to the steps of the Market Leaders as quickly as possible in their own way



Optimiser

- main innovative aspiration is to optimise the products, production methods and distribution methods that are well established on the market
- focuses strongly on operational excellence
- does not have the aspiration to be at the forefront of changes on the global market

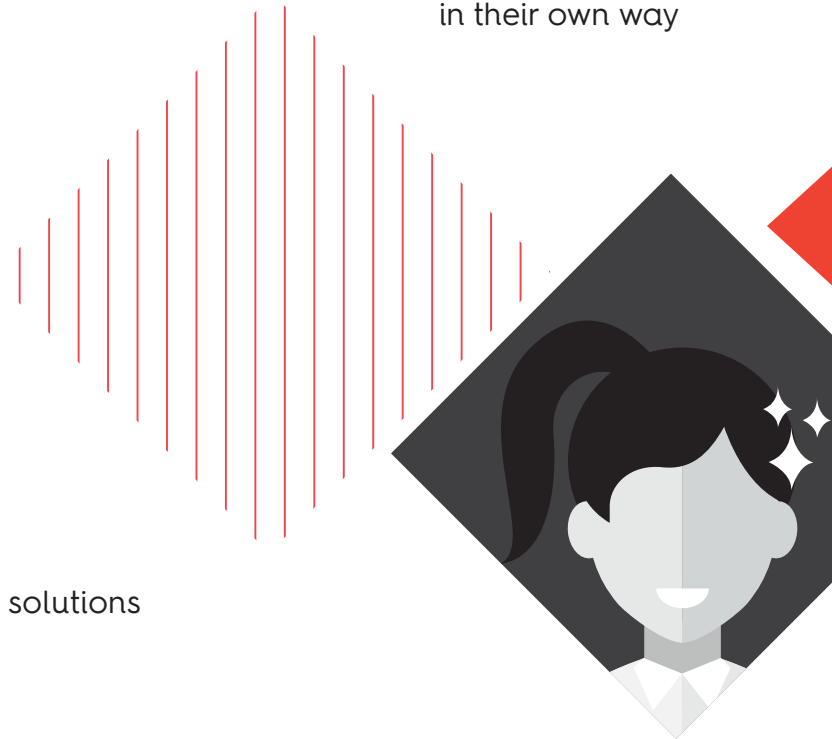
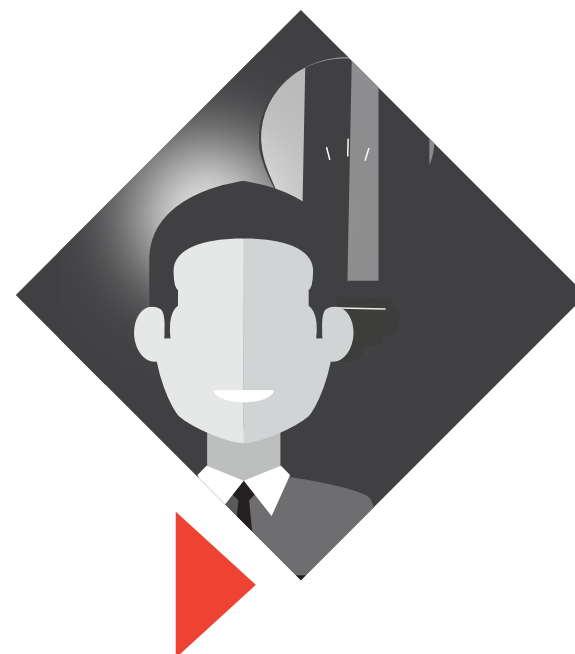
Non-decision maker

- composed mainly of businesses that are part of multinational corporations whose business vision is defined by another part of the group
- many of these companies are true Technology as well as global Market Leaders, but decisions are made outside of the Czech Republic

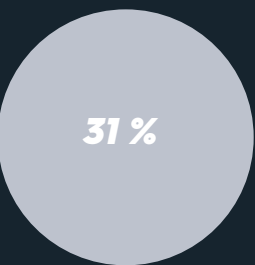


Pioneer

- technologically at the top of their field
- develops or strives to develop unique solutions that have the potential to be established in the industry
- research and development play a significant role, and there are few or no competitors



Aspirations to be a Change Leader



Follower

2 %



Non-decision maker

27 %

Pioneer

19 %

Optimiser

21 %

Leader

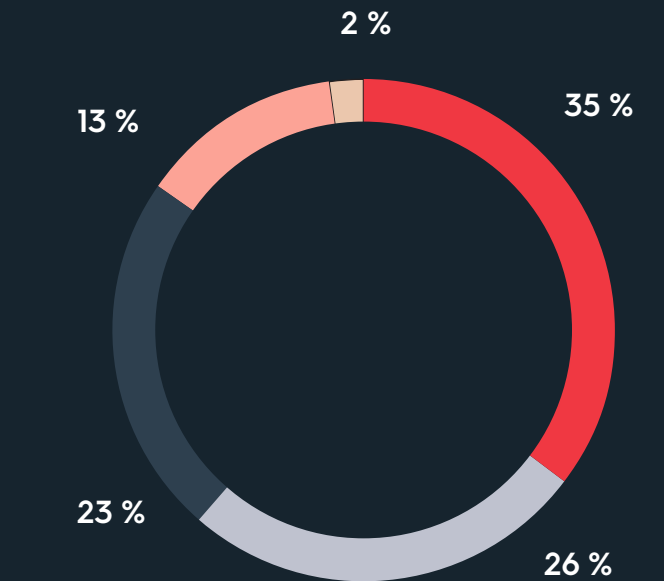
2014

2018

The number of companies with a pioneering ambition grew by 8 p.p.

Market Position

A company's position on the market is closely related to its business aspirations. Companies generally lack the courage to risk establishing themselves on global markets. Only 13 % are active on a global scale. One reason could be the strong link to markets in the Czech Republic and neighbouring countries, particularly Germany, which has historically been the largest source of direct foreign investment in the Czech Republic.

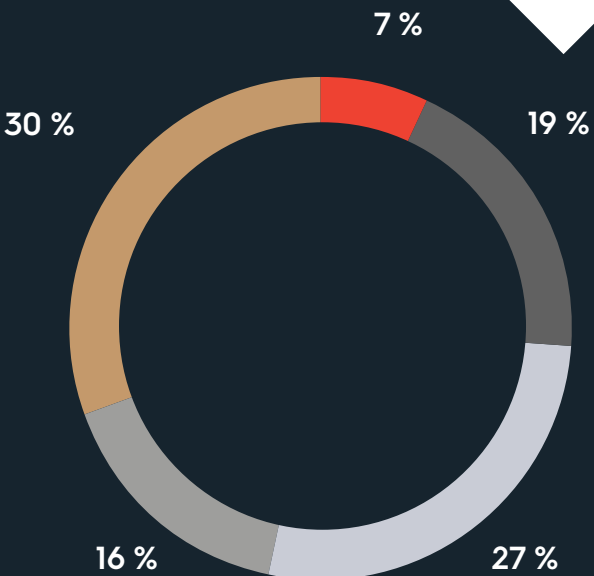


- Local company
- Global company
- Dependent company
- (Post)Start-up
- Regional company

Technology position

- Technology Leader
- Adopting technology from elsewhere
- Follower
- Pioneer
- Specialized Adopter

In the Czech economy there are very few companies acting as Technology Leaders, but there are many companies coming up with technological innovations that are unprecedented around the world. The most common strategy observed in the sample is to focus on custom solutions or specific market segments. This strategy is based on state-of-the-art technical competence aiming to fulfil a technical need that no one else is able or willing to resolve. Companies acting as Technology Leaders and Pioneers increasingly perceive their biggest challenge to be new technology.



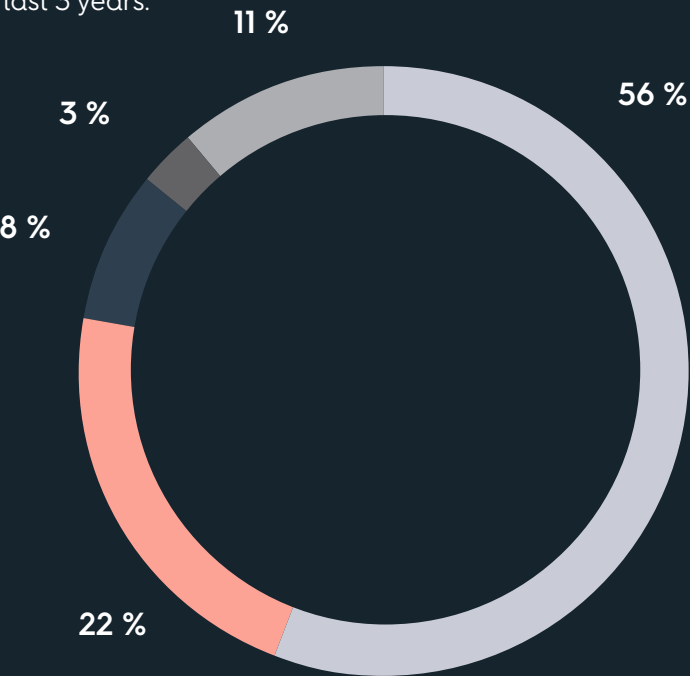
2018

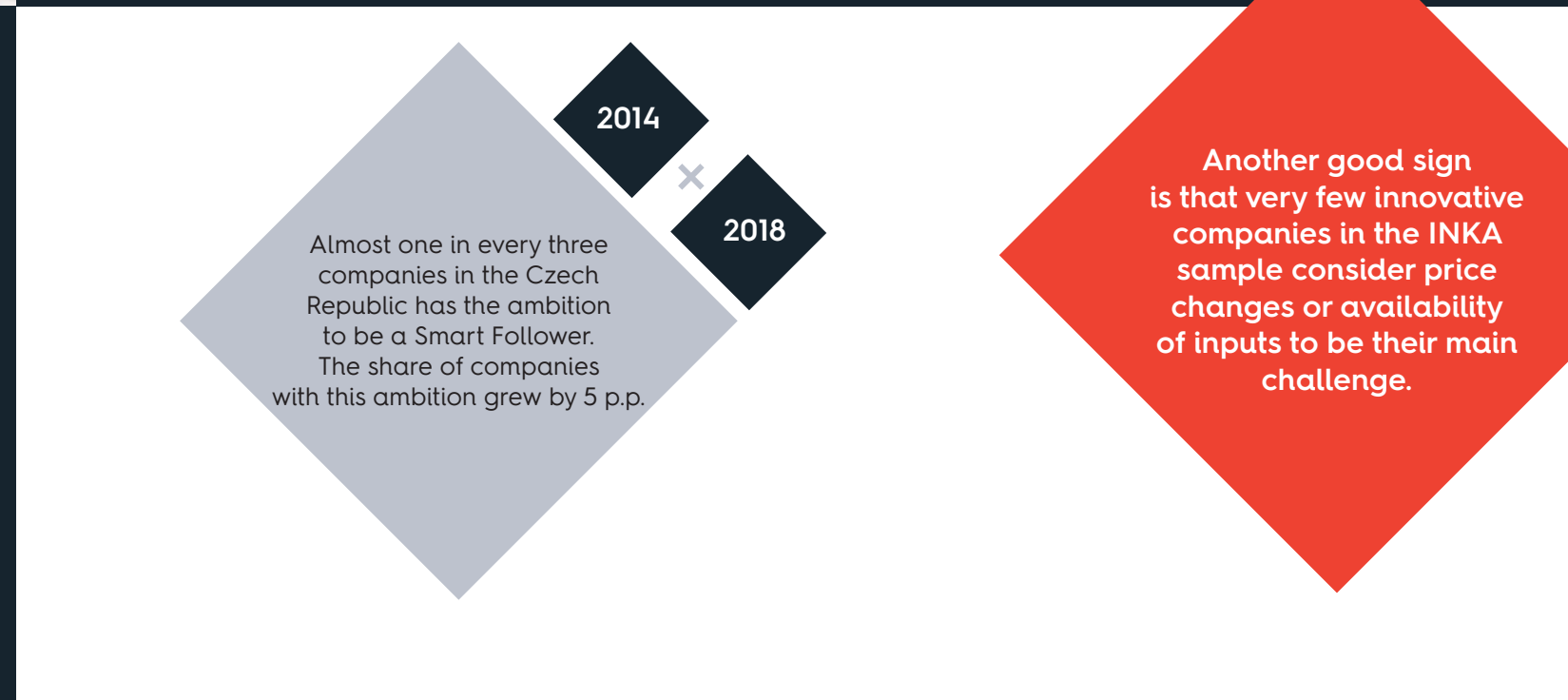
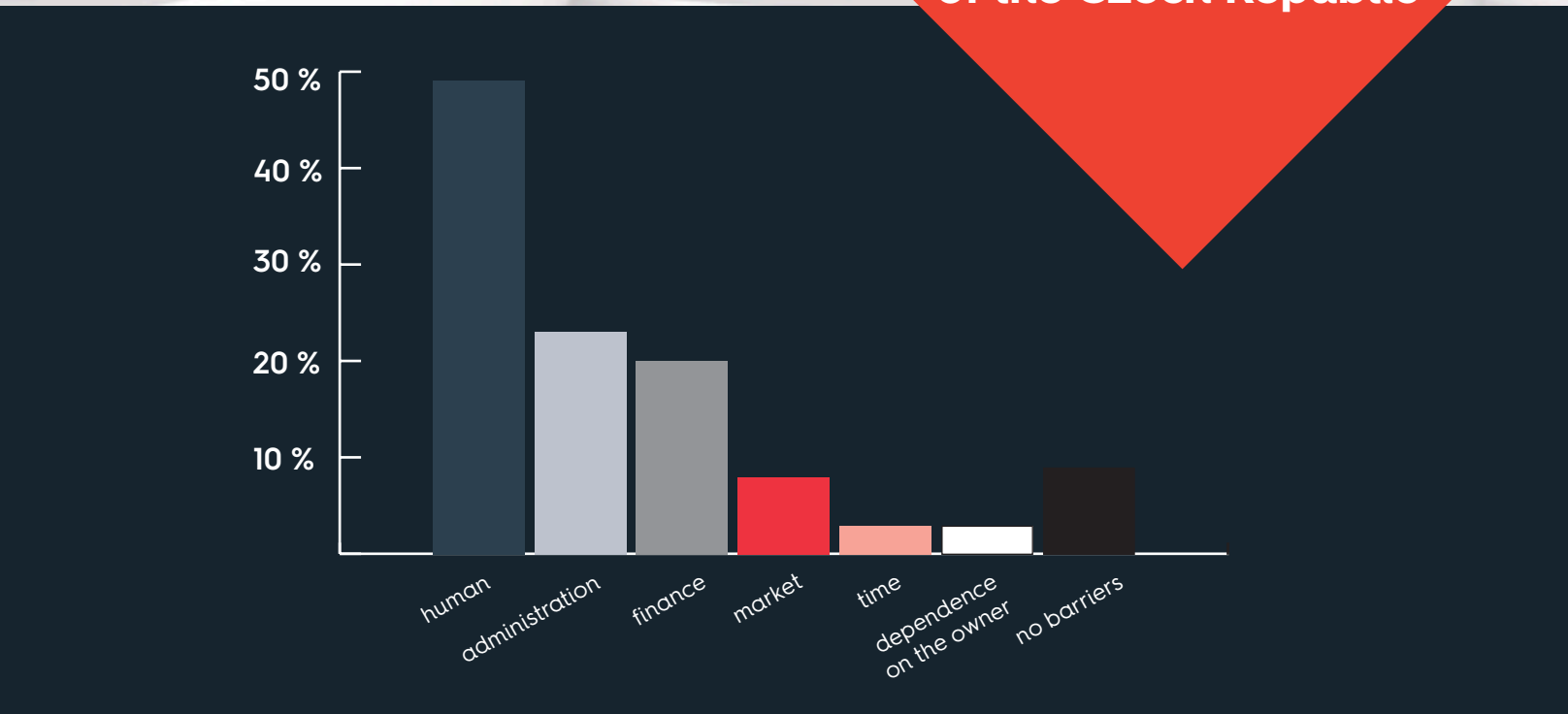
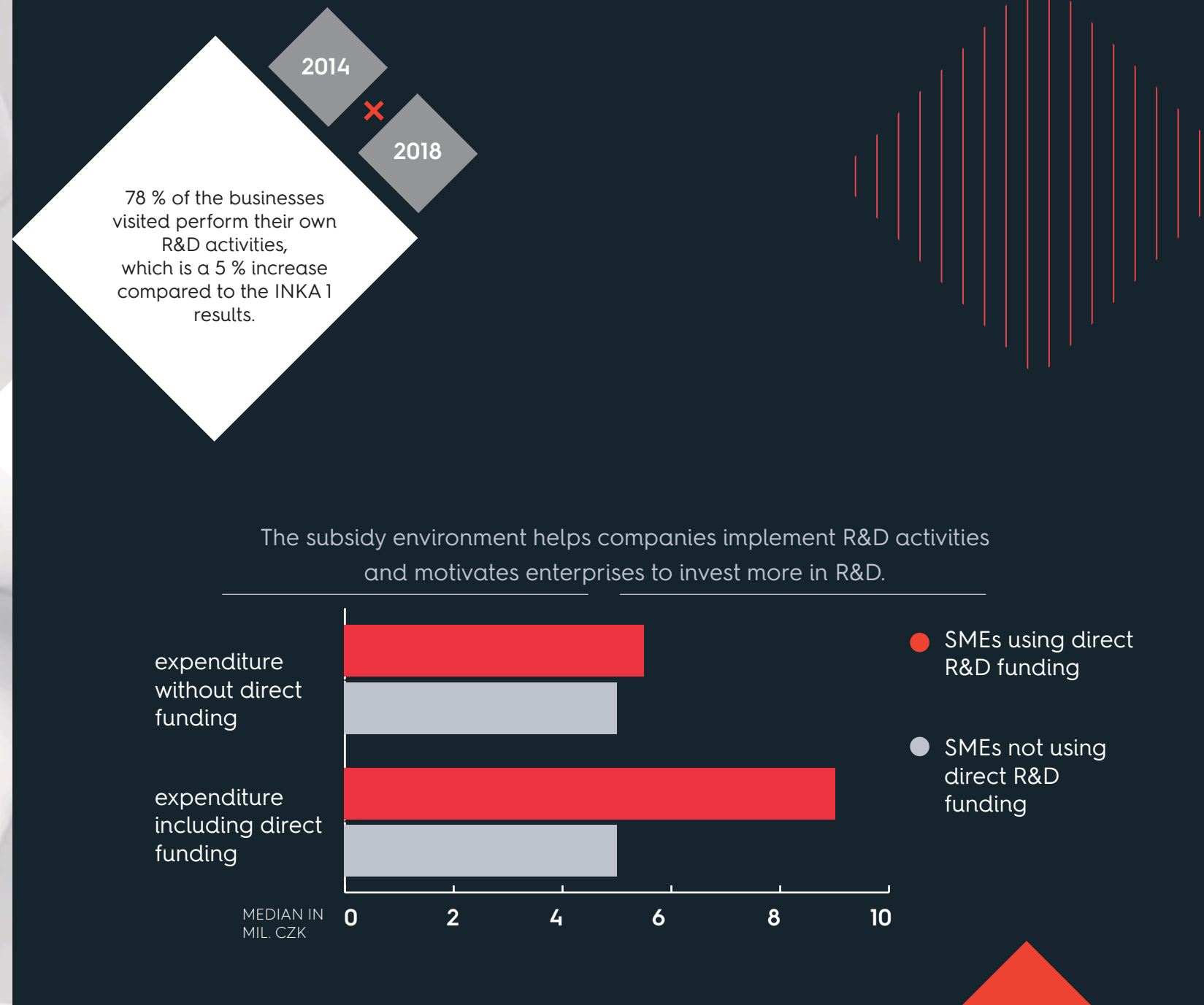
The number of companies in the Specialised Adopter category keeps increasing in the Czech Republic, specifically by 8 p.p.

Own R&D

For the surveyed companies, in-house research and development is a very important component of their activities and serves as a competitive advantage. When compared to INKA 1, the figures show that the share of companies doing their own R&D increased by 5 %. One in three companies did not increase or even reduced their R&D spending in the last three years. One in three companies increased R&D expenditure by at least 10 % in the last 3 years.

- Own R&D outside specific orders
- Only R&D for specific orders
- We contribute to R&D activities of the group
- No current R&D activities, but some are planned
- No current R&D activities and none are planned





We have recorded a few changes in the technological position of companies. The combined share of companies in the Specialised Adopter, Follower and Pioneer categories grew by 17 p.p. while the share of Technology Leaders dropped by 7 p.p.

This illustrates the typical situation in Czech companies that mostly follow the Technology Leaders but prefer not to directly compete with them. They mainly try to follow or develop unique technical solutions where they don't have many competitors.

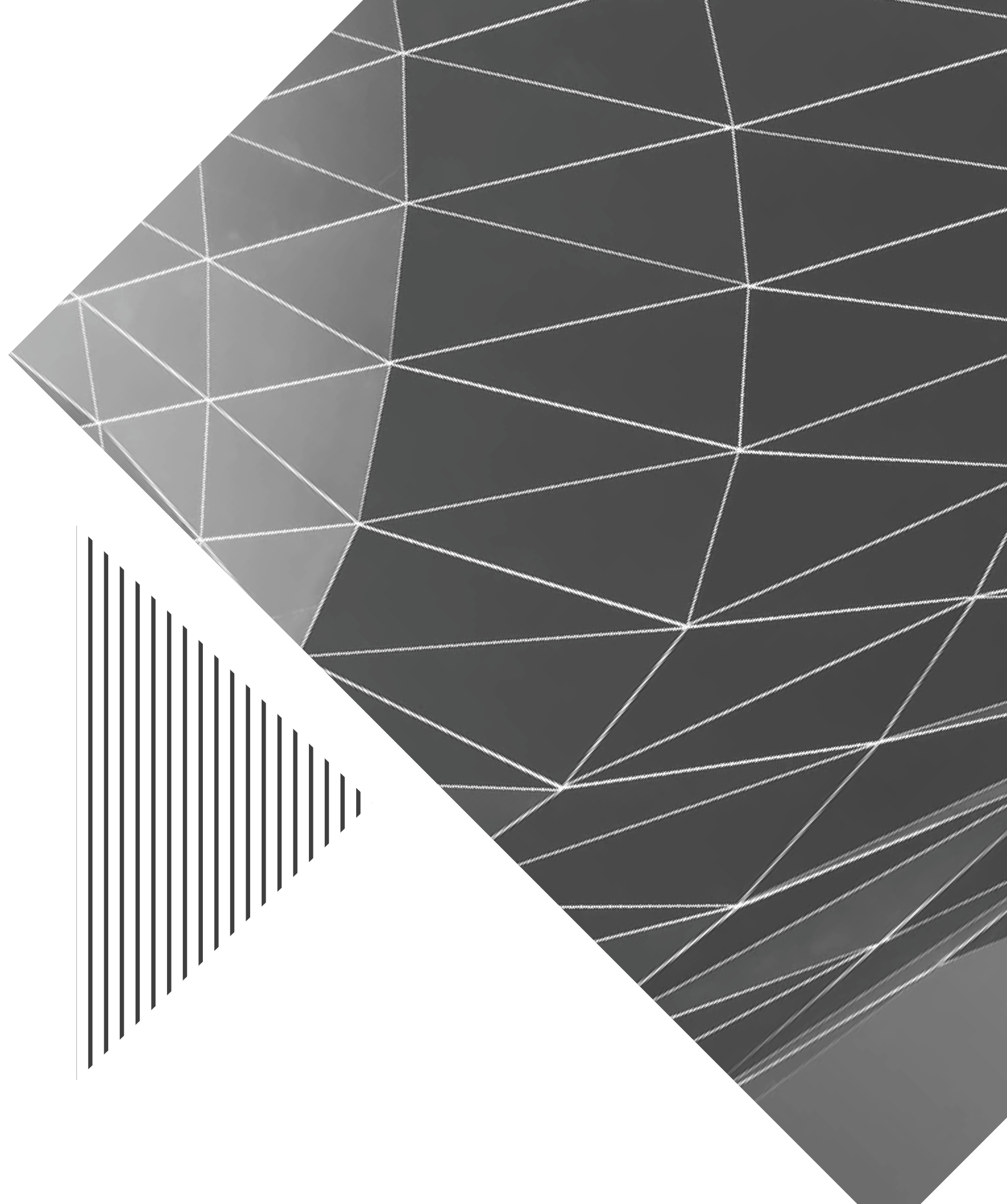
2014

x

2018



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2019

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