

PORTUGAL 2030

Consulting
Summit

27 OUT. 23

MAIA | Tecmaia



ACONSULTIIP
CONSULTORES INVESTIMENTO INOVAÇÃO



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Maia, 27 de outubro 2023

Quadro de referência

Financiamento das Medidas de Investimento Económico e Social



2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
PT 2020 12,8 mil M€ (3,7 mil M€ / ano)									
PLANO DE RECUPERAÇÃO EUROPEU									
REACT EU 1,8 mil M€ (0,6 mil M€ / ano)									
15,3 mil M€ subvenções + 10,8 mil M€ empréstimos (2,5 mil M€ / ano + 1,8 mil M€ / ano)									
QUADRO FINANCEIRO PLURIANUAL 2021-2027 29,8 mil M€ (3,3 mil M€ / ano)									
PT 2020 + PLANO DE RECUPERAÇÃO EUROPEU + QUADRO FINANCEIRO PLURIANUAL 2021-2027 57,9 mil M€ em subvenções (6,4 mil M€ / ano)									
ORÇAMENTOS DO ESTADO (Fundos Nacionais)									

HORIZON EUROPE

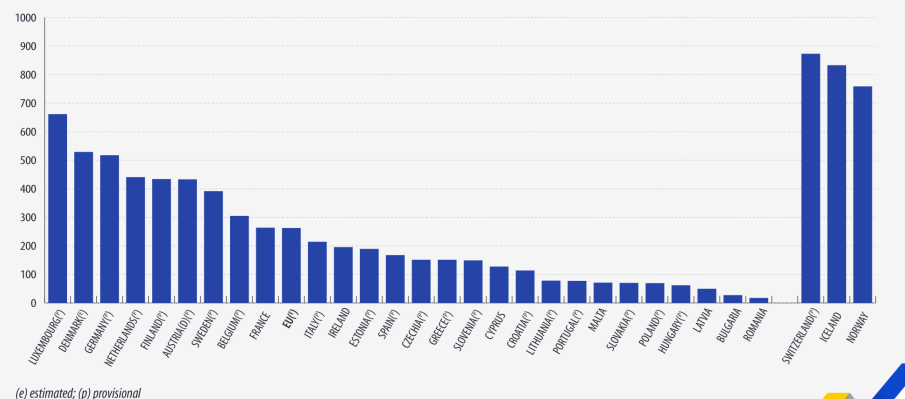
EURATOM



* The European Institute of Innovation & Technology (EIT) is not part of the Specific Programme

Government budget allocations for R&D, 2022

(€ per person)



Algumas pistas

- There is a favourable public funding portfolio of programmes but Portugal must select priorities to tackle needs and limitations;
- The Portuguese Recovery and Resilience Programme (PRR) is more focused on public priorities than on contributing to business competitiveness;
- There is no innovation policy in Portugal and the national innovation system is immature;
- The limited number of companies doing R&D activities and their size/technological intensity and the topics identified for Horizon Europe may difficult the involvement of national stakeholders;
- Portugal has a better position in soft indicators (qualitative) than in hard indicators;

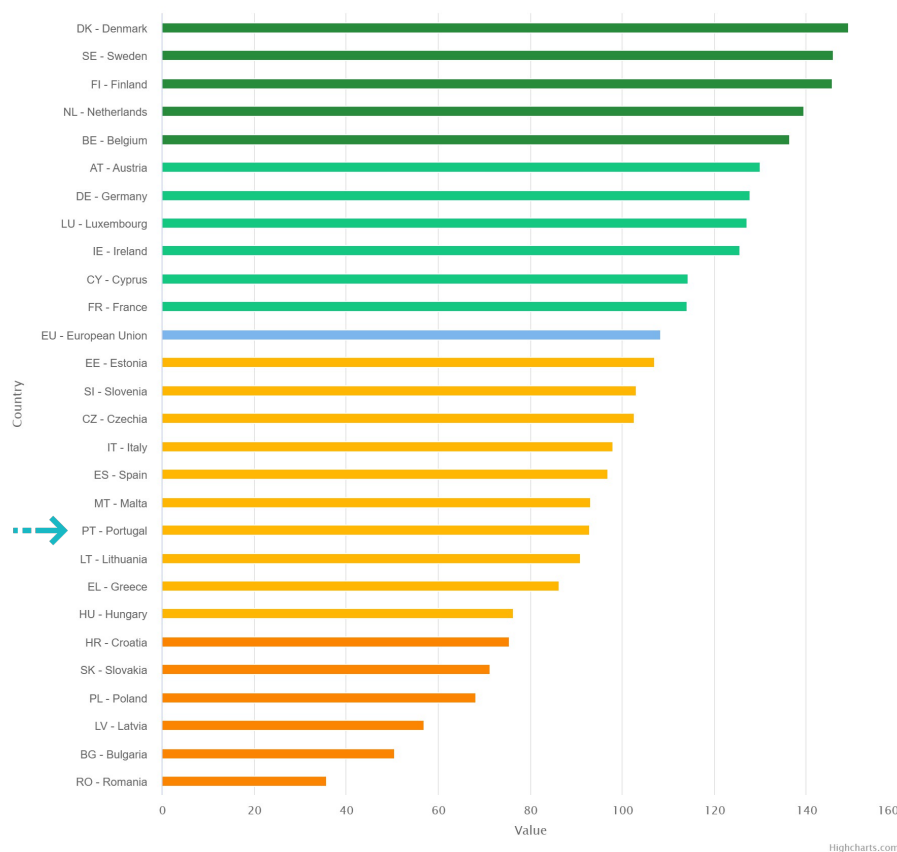
IN A NUTSHELL:
**Funding is available
but there is a danger
of dispersion or even
lack of efforts to
accelerate innovation.**



Portugal: Inovador Moderado

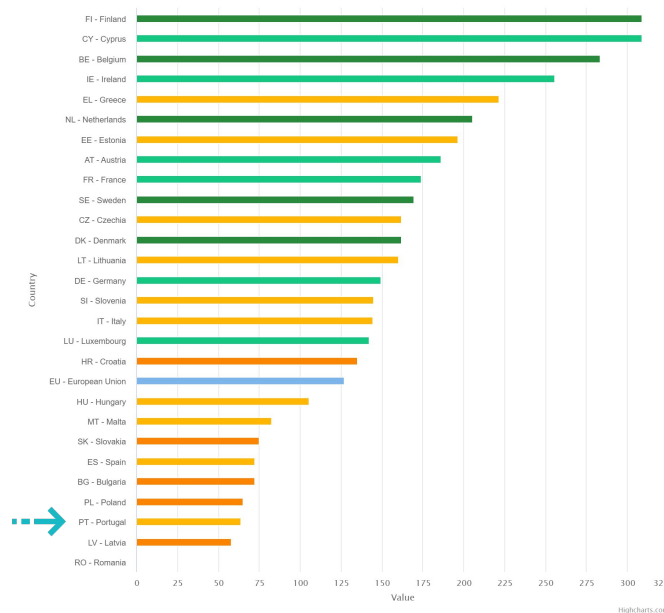
0 Summary Innovation Index

Source: European Innovation Scoreboard 2023



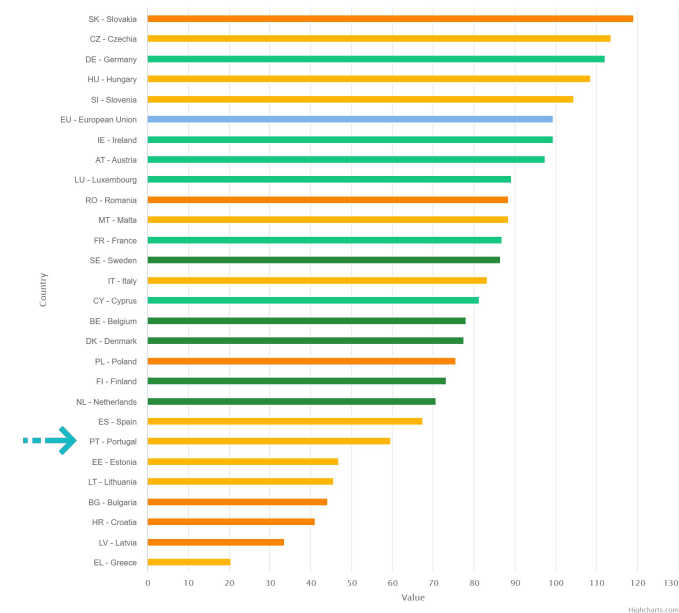
3.2.1 Innovative SMEs collaborating with others (Regional)

Source: European Innovation Scoreboard 2023



4.2.1 Exports of medium and high technology products

Source: European Innovation Scoreboard 2023





Desafios

Macro Level Perspective: Insights from OECD

Policy mix is not entirely consistent with the ambition.

National self-interest, also when it comes to business support for innovation, will be most often best served by international collaboration.

Incentivize and influence research and innovation in firms can have major implications for our future.

Preserving innovation capabilities is an imperative for survival but in many industries are under significant stress.



Source: OECD (2021), Science, Technology & Innovation Outlook

Figure: Confluence of objectives and constraints to government support for business innovation



Micro Level Perspective: Focusing Business Capabilities

What to learn from past crisis?

Gulati & Wieldman (2020; 2010), analysed 4700 companies in three different crises and suggest that companies obtain different results:

Due to different behaviours.

Those having better results:

- Master the balance between efficiency (reducing costs) and investment (focus in value creation)
- Deploy a combination of defensive and offensive strategies
- Capture new market opportunities, investing more than competitors in R&D and marketing

17%

**Does not
survive**

80%

**Lost profits
and take long
to recover**

9%

**Invested in
innovation and
seized opportunities**



Key Drivers: Macro and Micro Perspectives Common Priorities

1 —

Reinforce
business
capabilities



2 —

Focus on **R&D and innovation activities (I+D+I)** and adjust policy mix



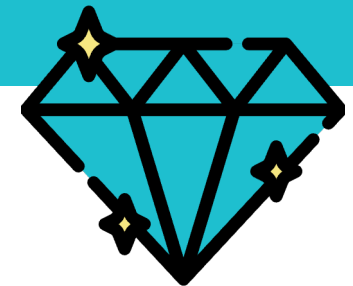
3 —

Promote **collaboration**, synergetic and complementary linkages (value chain logic)



4 —

Seize opportunities and create **value**



Innovation @ PRR: A mismatch between ambition and action?

R&D

BUSINESS
CAPABILITIES

MARKET DRIVEN
COLLABORATION

implementação promoção eficiência
competências aumento objetivos plano reforço rede capacidade
promover resiliência investimentos
apoio empresas transição energia
nacional energética
portugal mais investimento
saúde digital social gestão sistema
pessoas desenvolvimento serviços áreas
pública digitais recursos redução





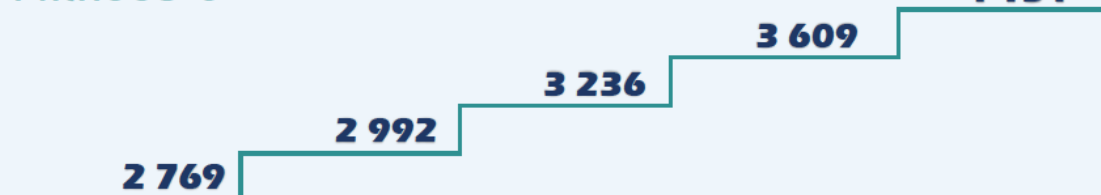
O Real Impacto das Agendas Mobilizadoras

Impactos na intensidade de I&D e na competitividade

Despesa em I&D (2018-2022)

Total nacional

Milhões €



% PIB

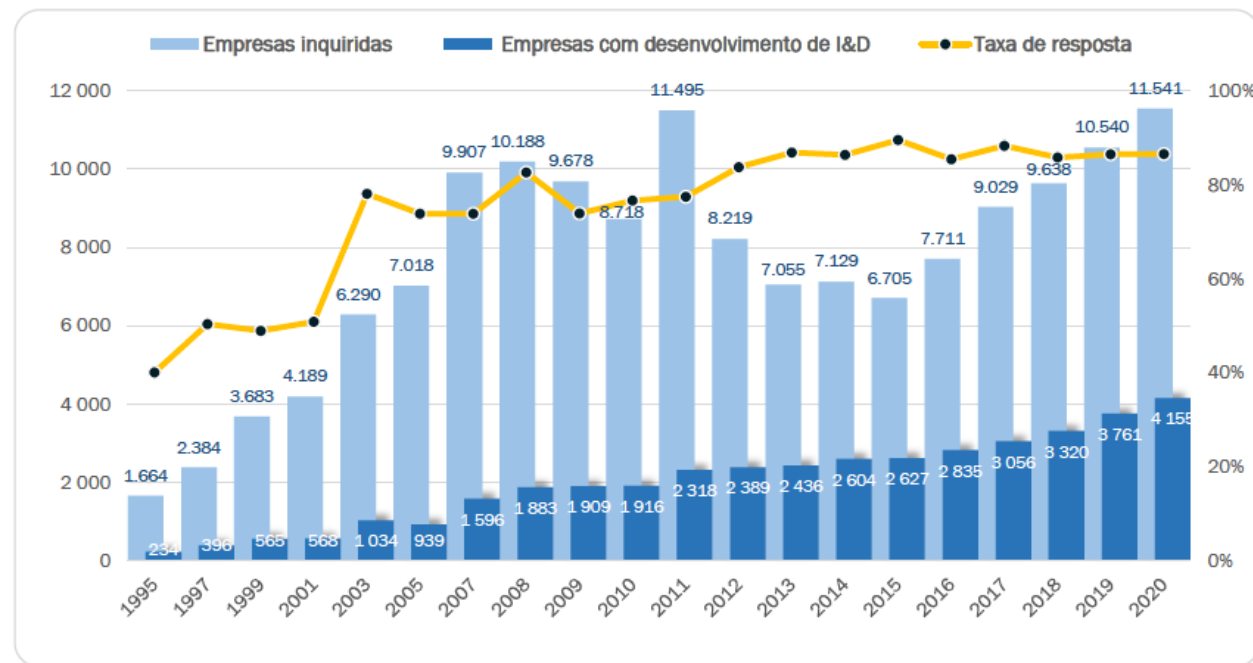
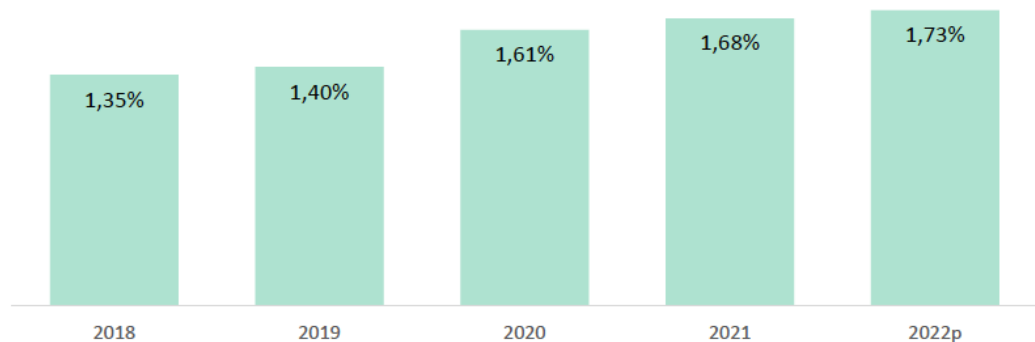
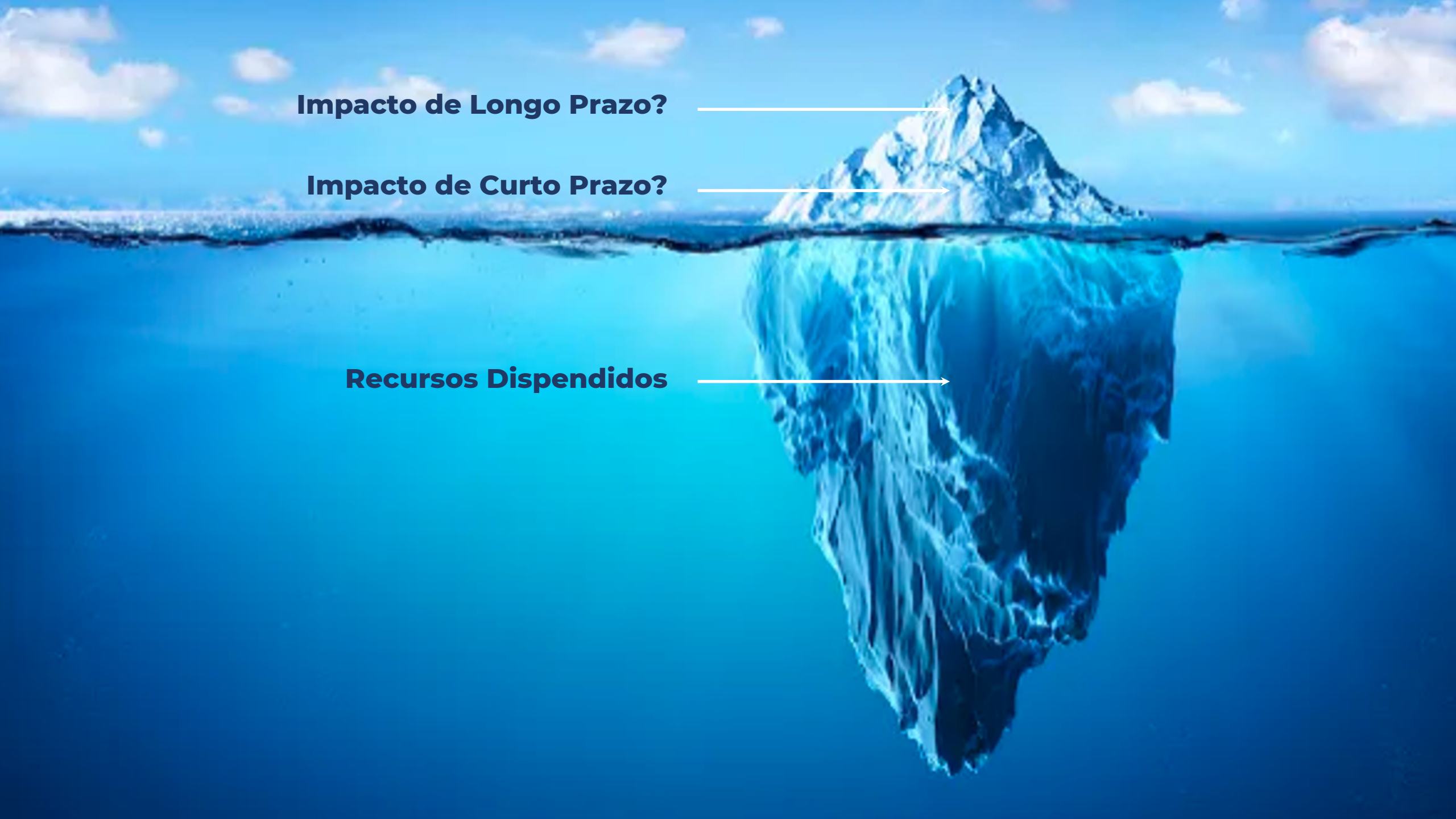


Figura 6 - Evolução do número de empresas inquiridas, das taxas de resposta e do número de empresas com I&D

Impacto de Longo Prazo?

Impacto de Curto Prazo?

Recursos Dispendidos





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