



# Investments in Key Enabling Technologies

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## OUR PRIORITY TO INVEST IN KETs

- **Top priority to foster investments in Strategic Value Chains**
  - ▶ Other regions of the world invest massively
  - ▶ FDIs target strategic companies and sectors
- **We need Europe's technological leadership and autonomy to serve our societal and policy goals**

## OUR PRIORITY TO INVEST IN KETs

- **We expect (most) Strategic Value Chains to be based on KETs**
  - ▶ Broad KETs list (including AI, security and connectivity)
  - ▶ IPCEI criteria (major innovation)
- **KETs infrastructures will be crucial to identify the technology and enable industrial R&I towards industrial deployment**

## OUR PRIORITY TO INVEST IN KETs

- **With investments in Strategic Value Chains, we want to focus on**
  - ▶ Large investments (e.g. > 1bn)
  - ▶ From several countries
  - ▶ In industrial base
  - ▶ Including R&I and other costs for first industrial deployment of major innovation

## OUR OVERALL STRATEGY FOR KETs

**Investing in Strategic Value Chains is a must but not sufficient to ensure Europe's technological leadership in the next decade**

- ▶ Combination of KETs will drive the new innovation wave(s)
- ▶ Technological change gets quicker and more complex
- ▶ Our ecosystem in Europe is too fragmented

## OUR OVERALL STRATEGY FOR KETs

### **Our strategy for KETs includes several pillars**

- ▶ Develop the next generation of KETs, based on European collaboration in R&D
- ▶ Deploy KETs in value chains, in particular with a European system for innovation infrastructures (TRLs 4-7)
- ▶ Diffuse KETs to more companies (HUBs)
- ▶ Invest in strategic value chains

## OUR FINDINGS ON KETs INFRASTRUCTURES

### **EU mapping of KETs Centres (=infrastructures)**

- 1350 KETs Infrastructures
- Concentrated in 6 Member States
- Lack of cross-border access for SMEs due to
  - ▶ lack of information
  - ▶ lack of advice
  - ▶ lack of funding for cross-border projects

## OUR FINDINGS ON KETs INFRASTRUCTURES

### **EU mapping of KETs Centres (=infrastructures)**

- Insufficient information (and not sufficiently harmonised) for a true analysis of gaps and overlaps
- Lack of common language to describe services (and conditions for access)
- Quality assurance is costly and challenging
- The system does not allow online interaction



## OUR FINDINGS ON KETs INFRASTRUCTURES

### **SMEs want**

- business solutions for value chains, not only technology
- integrated support (technology+business+regulation), from lab to market
- Clear conditions for access
- Funding for their cross-border projects

## OUR FINDINGS ON KETs INFRASTRUCTURES

### KETs infrastructures

- Still see each other as competitors
- But see potential for economies of scale on e.g.
  - ▶ Outreach to SMEs, branding
  - ▶ Multi-KETs approaches
  - ▶ Knowledge of value chains and markets

## INVESTING IN KETs INFRASTRUCTURES?

**YES**

**More coordinated**

**EU system**



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**Thank you**