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Technological innovation expenditure for 2012 is estimated at €156.8 million.

## Business Innovation: 2010-2012

In the period under review, 702 enterprises employing at least 10 persons, or 47.8 per cent of the total, undertook innovation activity (Table 1). The remaining 767 enterprises did not pursue innovative activity. By type of innovation activity, 88 enterprises were engaged solely in technological innovation, 239 enterprises were engaged in non-technological innovation and the remaining 375 were involved in both technological and non-technological innovation.

Technological innovation expenditure for 2012 is estimated at €156.8 million (Table 2). Of these, 9.9 per cent are attributed to printing and reproduction of recorded media (NACE division 18). This was subsequently followed by computer programming (NACE division 62), accounting for 6.8 per cent of the total expenditure. By type of innovative expenditure, the acquisition of machinery and equipment is predominant with a total of €113.9 million (72.6 per cent), followed by intramural R&D amounting to €29.8 million, or 19.0 per cent.

Table 5 shows that 33.0 per cent of all technological innovative enterprises found it was highly important to use information sources from within the enterprise or enterprise group, followed by suppliers of equipment, materials, components or software (23.9 per cent). The survey revealed that 614 enterprises were engaged in organisational and/or marketing innovation, with organisational innovation predominant over marketing innovation (Table 6). Non-technological innovation was predominant in wholesale and retail trade activities, followed by manufacturing and accommodation and food service activities respectively (Table 7).

Setting specific goals to increase turnover and reduce costs proved to be highly important in all employment size classes (Table 8). Reduction of in-house operation costs across all employment size classes is prevalent where both innovative and non-innovative enterprises are concerned. Of the total enterprises under study, 648 enterprises (44.1 per cent) find this strategy as highly important for reaching enterprise's goals. This was closely followed by the reduction in costs of purchased materials, components or services, as well as the strategy of increasing the responsiveness of the organisation (Table 9).

Strong competition in price (50.3 per cent) and product quality, reputation or brand (30.7 per cent) were the two main obstacles hindering enterprise's goals for both innovative and non-innovative enterprises (Table 10) ■

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**Table 1. Number of enterprises by type of innovation activity: 2010-2012**

	Size class: number employed			Total	Percentage Distribution
	10-49	50-249	250+		
<b>Total Enterprises</b>	1,135	281	53	<b>1,469</b>	100.0
<b>Enterprises with Innovation Activity</b>	493	170	39	<b>702</b>	47.8
Technological Innovation only *	69	14	5	<b>88</b>	6.0
<i>of which reported Innovation expenditure</i>	37	11	4	<b>52</b>	3.5
Both Technological and Non-Technological Innovation	241	106	28	<b>375</b>	25.5
<i>of which reported Innovation expenditure</i>	168	81	24	<b>273</b>	18.6
Non-Technological Innovation only	183	50	6	<b>239</b>	16.3
<b>Non-Innovative Enterprises</b>	642	111	14	<b>767</b>	52.2

\*Technological innovative enterprises comprise those that have undertaken some form of technological innovation

Table 2. Technological innovation expenditure: 2012 ...

€000

NACE Rev. 2	Economic Sector	Enterprises reporting Innovation Expenditure	Intramural R&D*	Extramural R&D	Acquisition of machinery and equipment	Acquisition of other external knowledge	Other**	Total Expenditure	Percentage total
10	Manufacture of food products	20	636	41	5,959	-	709	7,345	4.7
11	Manufacture of beverages	4	111	-	-	-	37	148	0.1
13-14	Manufacture of textiles; Manufacture of wearing apparel	4	65	-	60	-	105	230	0.1
18	Printing and reproduction of recorded media	9	-	-	15,435	2	46	15,483	9.9
21	Manufacture of basic pharmaceutical products and pharmaceutical preparations	6	7,227	-	-	-	-	7,227	4.6
22	Manufacture of rubber and plastic products	7	826	-	3,129	5	190	4,150	2.6
23	Manufacture of other non-metallic mineral products	6	178	-	7,100	-	45	7,323	4.7
25	Manufacture of fabricated metal products, except machinery and equipment	4	64	-	118	-	45	227	0.1
26	Manufacture of computer, electronic and optical products	5	3,087	-	2,956	71	131	6,245	4.0
27	Manufacture of electrical equipment	4	227	-	15	-	103	345	0.2
31	Manufacture of furniture	3	2	-	153	-	63	218	0.1
various	Other manufacturing (see methodological notes)	14	2,402	761	1,727	67	698	5,655	3.5
38	Waste collection, treatment and disposal activities; materials recovery	4	24	-	435	-	500	959	0.6
41-42	Construction of buildings and civil engineering	4	30	50	747	-	17	844	0.5
43	Specialised construction activities	12	46	18	328	20	48	460	0.3
45	Wholesale and retail trade and repair of motor vehicles and motorcycles	4	-	-	32	3	5	40	0.0
46	Wholesale trade, except of motor vehicles and motorcycles	41	1,378	18	2,085	64	693	4,238	2.7
47	Retail trade, except of motor vehicles and motorcycles	28	26	-	3,792	1	1,728	5,547	3.5
49	Land transport	6	130	100	1,184	79	441	1,935	1.2

... Table 2. Technological innovation expenditure: 2012

€000

NACE Rev. 2	Economic Sector	Enterprises reporting Innovation Expenditure	Intramural R&D*	Extramural R&D	Acquisition of machinery and equipment	Acquisition of other external knowledge	Other**	Total Expenditure	Percentage total
52	Warehousing and support activities for transportation	7	128	6	208	45	71	459	0.3
55	Accommodation	15	10	2	583	42	223	860	0.5
56	Food and beverage service activities	21	13	-	373	101	191	677	0.4
58	Publishing activities	4	3,193	-	2	170	42	3,407	2.2
60	Programming and broadcasting activities	3	-	-	1,182	41	-	1,223	0.8
62	Computer programming	21	7,491	850	1,040	80	1,178	10,639	6.8
64	Financial service activities, except insurance and pension funding	5	66	-	2,213	488	20	2,786	1.8
65	Insurance	6	287	-	1,493	35	384	2,198	1.4
66	Activities auxiliary to financial services and insurance activities	6	471	-	117	-	25	613	0.4
69	Legal and accounting activities	7	22	2	155	37	195	410	0.3
70	Activities of head offices; management consultancy activities	4	113	-	79	-	49	241	0.2
71	Architectural and engineering activities; technical testing and analysis	6	121	-	291	-	52	464	0.3
73	Advertising and market research	3	18	3	27	-	55	103	0.1
79	Travel agency, tour operator reservation service and related activities	3	-	-	408	155	-	563	0.4
81	Services to buildings and landscape activities	4	20	-	55	-	62	137	0.1
<b>various</b>	Other non-manufacturing (see methodological notes)	25	1,404	-	60,404	191	1,418	63,418	40.4
	<b>Total</b>	<b>325</b>	<b>29,813</b>	<b>1,851</b>	<b>113,885</b>	<b>1,697</b>	<b>9,570</b>	<b>156,818</b>	<b>100.0</b>

\* Intramural R&D coverage in the survey is based on the Innovation methodology. Actual R&D expenditure for 2010 should be taken from NSO Release 149/2012 due to a more extensive coverage

\*\* This is composed of expenditure arising due to training for innovative activities, market introduction of innovations, design and any other expenditure arising from activities to implement new or significantly improved products and processes such as feasibility studies, testing, routine software development, tooling up, industrial engineering etc.

**Table 3. Technologically innovative enterprises which found the following methods for maintaining or increasing the competitiveness of product and process innovations as highly effective: 2010-2012**

Type of method	Size class: number employed			Total
	10-49	50-249	250+	
Total technologically innovative enterprises	69	14	5	88
Found methods as highly effective	11	-	1	12
'Medium' or 'low' degree of effectiveness	5	1	-	6
None of methods used	43	9	4	56
Patents	6	-	1	7
Design registration	3	-	-	3
Copyright	3	-	-	3
Trademarks	6	-	-	6
Lead time advantages	5	-	1	6
Complexity of goods or services	6	-	1	7
Secrecy (including non-disclosure agreements)	4	-	1	5

Note: Enterprises may record more than one type of method as 'high', 'medium' or 'low'. As a result, the total enterprises may only be summed up per type of method and not by size class.

**Table 4. Number of technologically innovative enterprises having cooperation arrangements: 2010-2012**

Cooperation partner	Technologically innovative			
	Size class: number employed			
	10-49	50-249	250+	Total
Total technologically innovative enterprises	69	14	5	88
At least one cooperation arrangement	8	1	1	10
No cooperation arrangement	61	13	4	78
Other enterprises within same enterprise group	2	-	-	2
Suppliers of equipment, materials, components or software	4	1	-	5
Clients or customers from the private sector	-	-	-	-
Clients or customers from the public sector	1	-	-	1
Competitors and other firms in the same industry	2	-	-	2
Consultants and commercial laboratories	1	-	-	1
Universities or other higher education institutions	1	-	1	2
Government or public research institutes	-	-	-	-

Note: Enterprises may have more than one cooperation arrangement. As a result, the total enterprises may only be summed up per cooperation partner and not by size class.

**Table 5. Technologically innovative enterprises finding the following information sources highly important for the enterprise's innovation activities: 2010-2012**

Type of information source	Technologically Innovative			
	Size class: number employed			
	10-49	50-249	250+	Total
Total technologically innovative enterprises	69	14	5	88
<i>At least one information source as 'high'</i>	31	9	3	43
<i>At least one information source as 'medium' or 'low'</i>	5	-	-	5
Within the enterprise or enterprise group	20	7	2	29
Suppliers of equipment, materials, components or software	16	4	1	21
Clients or customers from the private sector	10	4	1	15
Clients or customers from the public sector	6	2	-	8
Competitors and other enterprises from the same industrial sector	5	4	-	9
Consultants and commercial labs	4	2	1	7
Universities or other higher education institutes	3	1	-	4
Government, public or private research institutes	-	-	-	-
Conferences, trade fairs and exhibitions	12	3	-	15
Scientific journals and trade/technical publications	5	-	-	5
Professional and industrial associations	5	-	-	5

Note: Enterprises may record more than one information source as 'high', 'medium' or 'low'. As a result, the total enterprises may only be summed up per information source and not by size class.

**Table 6. Number of enterprises introducing organisational and marketing innovations: 2010-2012**

Type of innovation	Size class: number employed			Total
	10-49	50-249	250+	
Enterprises introducing organisational and/or marketing innovations*	424	156	34	614
Enterprises introducing organisational and marketing innovations	206	81	22	309
Enterprises introducing organisational innovation only	113	37	8	158
Enterprises introducing marketing innovation only	105	38	4	147

\* Enterprises introduced organisational and/or marketing innovations, regardless if with or without technological innovation

**Table 7. Number of enterprises introducing organisational and marketing innovation by NACE section and type of non-technological innovation: 2010-2012**

<b>NACE Rev. 2</b>	<b>Economic sector</b>	<b>Enterprise introducing organisational and/or marketing innovations</b>	<b>Enterprise introducing organisational and marketing innovations</b>	<b>Enterprise introducing organisational innovation</b>	<b>Enterprise introducing marketing innovation</b>
<b>A</b>	Agriculture, Forestry and Fishing	3	-	-	3
<b>B</b>	Mining and Quarrying	3	1	2	-
<b>C</b>	Manufacturing	106	62	22	22
<b>D</b>	Electricity, Gas, Steam and Air conditioning supply	1	-	1	-
<b>E</b>	Water supply; Sewerage, Waste management and Remediation activities	2	-	2	-
<b>F</b>	Construction	31	13	13	5
<b>G</b>	Wholesale and Retail trade	175	87	36	52
<b>H</b>	Transportation and Storage	36	14	15	7
<b>I</b>	Accommodation and Food service activities	74	41	10	23
<b>J</b>	Information and Communication	43	21	11	11
<b>K</b>	Financial and Insurance activities	41	21	13	7
<b>L</b>	Real Estate activities	5	2	-	3
<b>M</b>	Professional, Scientific and Technical activities	52	27	17	8
<b>N</b>	Administrative and Support Service activities	42	20	16	6
<b>Total</b>		<b>614</b>	<b>309</b>	<b>158</b>	<b>147</b>

Note: Enterprises introduced organisational and/or marketing innovations, regardless if with or without technological innovation.

**Table 8. Number of innovative and non-innovative enterprises finding the following variables as highly important for reaching enterprise's goals: 2010-2012**

Type of variable	Innovative				Non-innovative			
	Size class: number employed							
	10-49	50-249	250+	Total	10-49	50-249	250+	Total
<b>Total of innovative and non-innovative enterprises</b>	<b>493</b>	<b>170</b>	<b>39</b>	<b>702</b>	<b>642</b>	<b>111</b>	<b>14</b>	<b>767</b>
<i>At least one variable as 'high'</i>	442	156	36	634	343	63	9	415
<i>At least one variable as 'medium' or 'low'</i>	26	6	2	34	38	5	-	43
Increase in turnover	378	140	35	553	295	58	6	359
Increase in market share	295	116	29	440	191	39	2	232
Decrease costs	344	132	31	507	275	48	5	328
Increase in profit margins	326	122	31	479	246	50	5	301

Note: Enterprises may record more than one variable as 'high', 'medium' or 'low'. As a result, the total enterprises may only be summed up per variable and not by size class.

**Table 9. Innovative and non-innovative enterprises finding the following strategies as highly relevant for reaching enterprises's goals: 2010-2012**

Type of strategy	Innovative				Non-Innovative			
	Size class: number employed							
	10-49	50-249	250+	Total	10-49	50-249	250+	Total
<b>Total of innovative and non-innovative enterprises</b>	<b>493</b>	<b>170</b>	<b>39</b>	<b>702</b>	<b>642</b>	<b>111</b>	<b>14</b>	<b>767</b>
<i>At least one type of strategy as 'high'</i>	399	140	33	572	283	48	6	337
<i>At least one strategy as 'medium' or 'low'</i>	25	2	-	27	22	5	1	28
Developing new markets within Europe	106	48	15	169	44	10	-	54
Developing new markets outside Europe	80	37	15	132	26	5	-	31
Reducing in-house costs of operation	279	109	27	415	192	37	4	233
Reducing costs of purchased materials, components or services	219	96	21	336	174	30	4	208
Introducing new or significantly improved goods or services	198	67	18	283	79	12	2	93
Intensifying or improved the marketing of goods or services	181	74	13	268	92	15	1	108
Increasing flexibility/responsiveness of organisation	225	86	25	336	123	20	4	147
Building alliances with other enterprises or institutions	85	25	7	117	26	3	-	29

Note: Enterprises may record more than one type of strategy as 'high', 'medium' or 'low'. As a result, the total enterprises may only be summed up per type of strategy and not by size class.



**Table 10. Innovative and non-innovative enterprises finding the following obstacles highly relevant in meeting enterprise's goals: 2010-2012**

Type of obstacle	Innovative				Non-Innovative			
	Size class: number employed							
	10-49	50-249	250+	Total	10-49	50-249	250+	Total
<b>Total of innovative and non-innovative enterprises</b>	<b>493</b>	<b>170</b>	<b>39</b>	<b>702</b>	<b>642</b>	<b>111</b>	<b>14</b>	<b>767</b>
<i>At least one obstacle as 'high'</i>	398	139	27	564	279	54	5	338
<i>At least one obstacle as 'medium' or 'low'</i>	32	7	1	40	31	3	-	34
Strong price competition	305	120	22	447	236	51	5	292
Strong competition on product quality, reputation or brand	210	70	17	297	132	19	3	154
Lack of demand	100	30	4	134	80	5	-	85
Innovations by competitors	52	28	2	82	38	4	-	42
Dominant market share held by competitors	97	45	5	147	56	11	1	68
Lack of qualified personnel	65	22	3	90	19	3	1	23
Lack of adequate finance	80	24	7	111	52	7	-	59
High cost of access to new markets	77	26	3	106	34	4	-	38
High cost of meeting government regulations or legal requirements	112	36	5	153	61	5	1	67

Note: Enterprises may record more than one obstacle as 'high', 'medium' or 'low'. As a result, the total enterprises may only be summed up per obstacle and not by size class.

Table 11. Number of innovative and non-innovative enterprises by NACE section and strategies of high importance to meet enterprise's goals: 2010-2012

NACE Rev. 2	Developing new markets within Europe	Developing new markets outside Europe	Reducing in-house costs of operation	Reducing costs of purchased materials, components or services	Introducing new or significantly improved goods or services	Intensifying or improving the marketing of goods or services	Increasing flexibility/responsiveness of your organisation	Building alliances with other enterprises or institutions
<b>Innovative</b>								
A	-	-	3	3	-	1	1	1
B	1	1	2	2	1	1	2	-
C	42	36	76	69	52	36	59	19
D	-	-	1	1	1	-	-	1
E	-	-	2	1	1	-	1	-
F	5	4	17	21	12	8	12	7
G	18	17	121	95	89	91	93	30
H	8	9	24	15	15	16	25	8
I	30	17	58	53	41	46	40	12
J	12	11	22	15	24	17	22	14
K	12	5	25	18	18	16	23	10
L	2	1	2	2	1	1	2	-
M	21	19	35	21	19	23	34	9
N	18	12	27	20	9	12	22	6
<b>Total</b>	<b>169</b>	<b>132</b>	<b>415</b>	<b>336</b>	<b>283</b>	<b>268</b>	<b>336</b>	<b>117</b>
<b>Non-Innovative</b>								
A	1	4	5	4	-	1	3	-
B	-	-	1	1	1	1	2	-
C	9	4	36	40	12	13	14	5
D	-	-	-	-	-	-	-	-
E	-	-	2	2	-	1	-	1
F	1	-	20	25	11	8	12	6
G	11	8	61	61	42	47	53	6
H	2	1	19	11	4	5	12	2
I	12	7	42	34	10	17	17	-
J	1	1	6	5	2	3	3	2
K	-	-	5	2	1	2	5	3
L	1	1	1	-	-	-	1	2
M	11	2	19	10	3	3	15	1
N	5	3	16	13	7	7	10	1
<b>Total</b>	<b>54</b>	<b>31</b>	<b>233</b>	<b>208</b>	<b>93</b>	<b>108</b>	<b>147</b>	<b>29</b>

Note: Enterprises may record more than one type of strategy as 'high', 'medium' or 'low'. As a result, the total enterprises may only be summed up per type of strategy.

Table 12. Number of innovative and non-innovative enterprises by NACE section and obstacles of high relevance to meet enterprise's goals: 2010-2012

NACE Rev. 2	Strong price competition	Strong competition on product quality, reputation or brand	Lack of demand	Innovations by competitors	Dominant market share held by competitors	Lack of qualified personnel	Lack of adequate finance	High cost of access to new markets	High cost of meeting government regulations or legal requirements
<b>Innovative</b>									
A	2	2	1	1	1	-	-	1	1
B	3	1	2	-	-	1	1	-	-
C	89	58	33	16	30	11	21	26	28
D	-	-	-	-	-	-	1	-	1
E	1	1	-	1	1	-	1	-	1
F	26	9	9	2	7	5	6	3	5
G	139	98	35	26	41	27	37	26	41
H	21	12	8	3	8	7	8	8	9
I	55	42	18	13	13	16	16	13	26
J	22	26	7	10	16	9	8	9	9
K	22	11	7	4	9	4	-	2	8
L	1	1	-	-	-	-	-	2	2
M	32	22	11	2	8	6	4	11	12
N	34	14	3	4	13	4	8	5	10
<b>Total</b>	<b>447</b>	<b>297</b>	<b>134</b>	<b>82</b>	<b>147</b>	<b>90</b>	<b>111</b>	<b>106</b>	<b>153</b>
<b>Non-Innovative</b>									
A	2	-	-	-	-	-	3	-	3
B	2	1	1	1	-	-	2	1	1
C	44	25	14	3	8	4	9	11	11
D	-	-	-	-	-	-	-	-	-
E	1	-	1	-	-	-	-	-	-
F	30	15	11	5	5	5	11	8	5
G	109	59	31	14	30	5	17	9	17
H	20	8	3	2	2	-	1	-	5
I	33	26	11	9	10	3	8	6	13
J	4	3	2	1	1	-	3	1	2
K	6	3	-	2	2	1	-	-	2
L	1	1	1	1	1	1	2	1	1
M	21	7	7	2	5	1	2	1	6
N	19	6	3	2	4	3	1	-	1
<b>Total</b>	<b>292</b>	<b>154</b>	<b>85</b>	<b>42</b>	<b>68</b>	<b>23</b>	<b>59</b>	<b>38</b>	<b>67</b>

Note: Enterprises may record more than one obstacle as 'high', 'medium' or 'low'. As a result, the total enterprises may only be summed up per obstacle.

## Methodological Notes

The statistical unit surveyed is the enterprise as per Council Regulation (EEC) No 2186/93. The Survey is conducted in accordance with the Commission Regulation on Innovation Statistics No 1450/2004.

The target population is the minimum coverage requested, namely total enterprises with 10 employed persons or more.

The following activities (NACE Rev. 2) are included in the target population:

- mining and quarrying (NACE 05-09)
- manufacturing (NACE 10-33)
- electricity, gas steam and air conditioning supply (NACE 35)
- water supply sewerage, waste management and remediation activities (NACE 36-39)
- wholesale trade, except of motor vehicles and motorcycles (NACE 46)
- transportation and storage (NACE 49-53)
- publishing activities (NACE 58)
- telecommunications (NACE 61)
- computer programming, consultancy and related activities (NACE 62)
- information services activities (NACE 63)
- financial and insurance activities (NACE 64-66)
- architectural and engineering activities technical testing and analysis (NACE 71)

Additional coverage was also conducted for the following non-core activities:

- agriculture, forestry and fishing (NACE 01-03)
- construction (NACE 41-43)
- wholesale and retail trade and repair of motor vehicles and motorcycles (NACE 45)
- retail trade, except of motor vehicles and motorcycles (NACE 47)
- accommodation and food service activities (NACE 55-56)
- motion picture, video and television programme production, sound recording and music publishing/programming and broadcasting activities (NACE 59-60)
- real estate activities (NACE 68)
- legal and accounting activities (NACE 69)
- activities of head offices management consultancy activities (NACE 70)
- scientific research and development (NACE 72)
- advertising and marketing research (NACE 73)
- other professional, scientific and technical activities (NACE 74)
- veterinary activities (NACE 75)
- rental and leasing activities (NACE 77)
- employment activities (NACE 78)
- travel agency, tour operator and other reservation services and related activities (NACE 79)
- security and investigation activities (NACE 80)
- services to buildings and landscape activities (NACE 81)
- office administrative, office support and other business support activities (NACE 82)

### Notes on Table 2:

- Research and Development (R&D) Intramural Expenditure reported in Table 2 is collected from the Community Innovation Survey (CIS) 2012, which due to difference in the coverage of the survey is to be used only for the compilation for the Total Innovation expenditure for 2012. Actual R&D expenditure for 2012 should be taken from News Release 132/2014 - Research and Development in Malta.
- The following NACE sections were aggregated due to confidentiality:

#### **'Other manufacturing' includes NACE divisions:**

- Manufacture of wood and of products of wood and cork, except furniture manufacture of articles of straw and plaiting materials (NACE 16)
- Manufacture of paper and paper products (NACE 17)

- Manufacture of chemicals and chemical products (NACE 20)
- Manufacture of machinery and equipment n.e.c. (NACE 28)
- Manufacture of motor vehicles, trailers and semi-trailers (NACE 29)
- Other manufacturing (NACE 32)
- Repair and installation of machinery and equipment (NACE 33)

**'Other non-manufacturing' includes NACE divisions:**

- Fishing and aquaculture (NACE 03)
- Mining support service activities (NACE 09)
- Electricity, gas, steam and air conditioning supply (NACE 35)
- Water collection, treatment and supply (NACE 36)
- Waste collection, treatment and disposal activities material recovery (NACE 38)
- Postal and courier activities (NACE 53)
- Real estate activities (NACE 68)
- Scientific research and development (NACE 72)
- Advertising and market research (NACE 73)
- Other professional, scientific and technical activities (NACE 74)
- Employment activities (NACE 78)
- Travel agency, tour operator and other reservation service and related activities (NACE 79)
- Services to buildings and landscape activities (NACE 81)

**Definition**



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.

A **process innovation** is the implementation of a new or significantly improved production process, distribution method, or supporting activity.

An **organisational innovation** is a new organisational method in the enterprise business practices (including knowledge management), workplace organisation or external relations that has not been previously used by the

A **marketing innovation** is the implementation of new marketing concept or strategy that differs significantly from the enterprise's existing marketing methods and which has not been used before.

European statistics comparable to data in this News Release are available at:

[EUROSTAT Website/Homepage/Statistics Database](#)

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