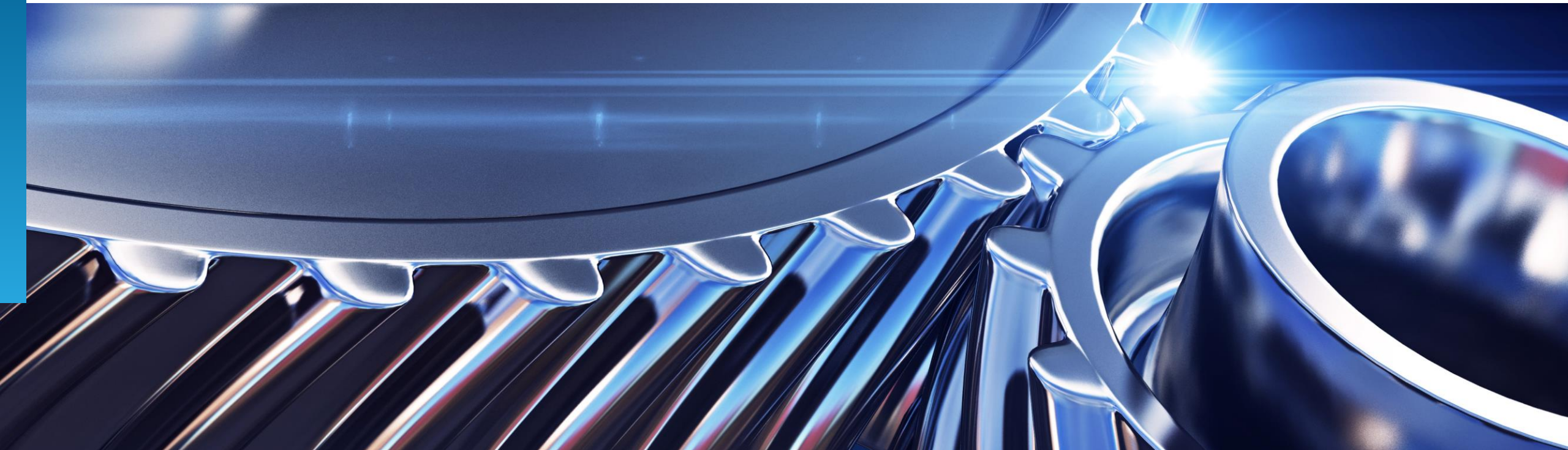


# Leading the Pack: Trends for the Top 200 Engineering Research & Development (ER&D) Enterprises

January 2021: Complimentary Abstract / Table of Contents



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## Background and scope of the research

### Background of the research

- The end of 2019 saw outbreak of the COVID-19 pandemic, which would go on to cause drastic changes in the lives of people and the ways businesses operated across 2020. With people forced to stay indoors for large parts of the year, businesses have digitized their offerings and workstreams in order to stay relevant
- Enterprises across industries have had to adjust their Engineering Research and Development (ER&D) spending, prioritize investment areas, and concentrate spending on these themes – ER&D has taken on greater significance as enterprises are now competing to capture a share of the consumer’s wallet in the midst of an economic downturn
- This research was conducted across eight verticals for enterprises featuring in the top 200 ER&D spend list, by factoring in their ER&D spend growth trends and key investment areas over the last year
- The report looks at the key themes that will continue to drive enterprise ER&D spend in the near future and provides a timeline of investments that enterprises have made over the previous year. The report also provides insights into ER&D spend intensity (ER&D spend as a percentage of revenue) for enterprises across verticals
- The focus of this research is only on business-financed ER&D spend. It excludes non-ER&D spend (e.g., clinical ER&D expenditure in pharmaceuticals and biotechnology, and molecular development ER&D expenditure in chemicals) as well as government-sponsored ER&D spend
- Enterprises that do not specifically report their ER&D expenses in their annual reports have been excluded from this analysis. Enterprises cutting across these eight industries have been featured under the industry where the proportion of ER&D spend is the highest

### Scope of this report:



**Geography**  
Global



**Industry**  
Market trends across eight industries: software, automotive, aerospace and defense, semiconductors, telecom service providers, telecom equipment providers, consumer electronics, and medical devices

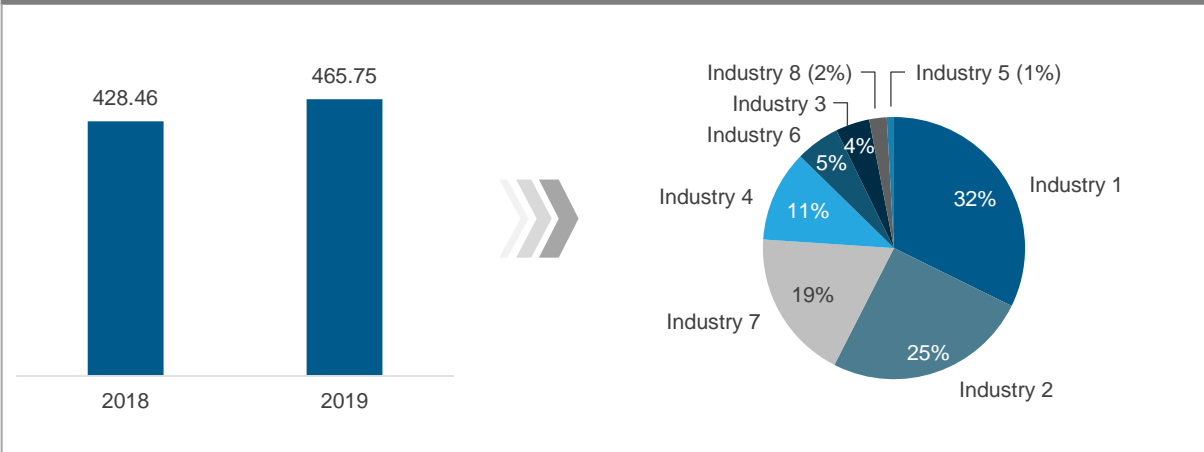


**Services**  
Engineering services

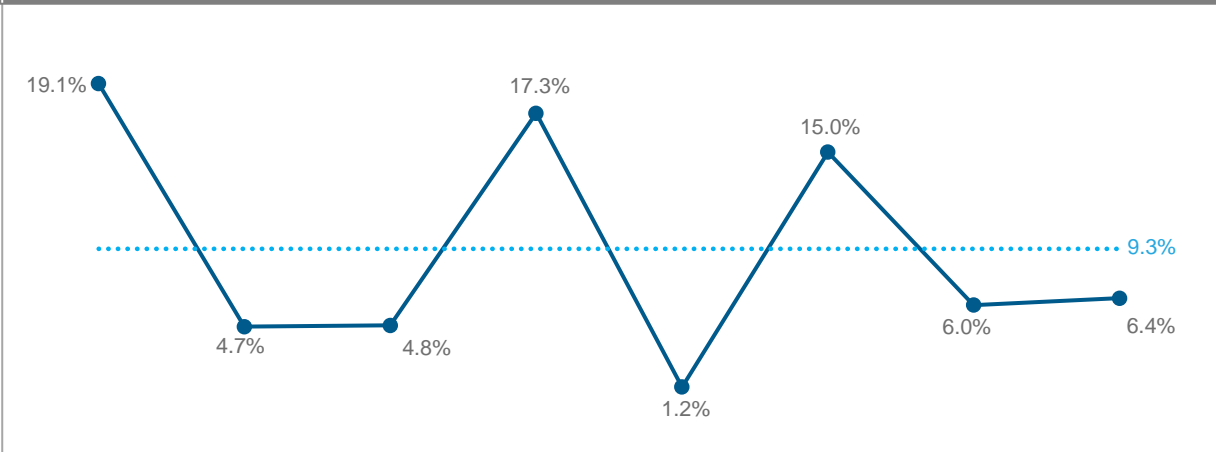


# This report includes ER&D spend analysis along with insights on key investment priorities for enterprises across eight key industries

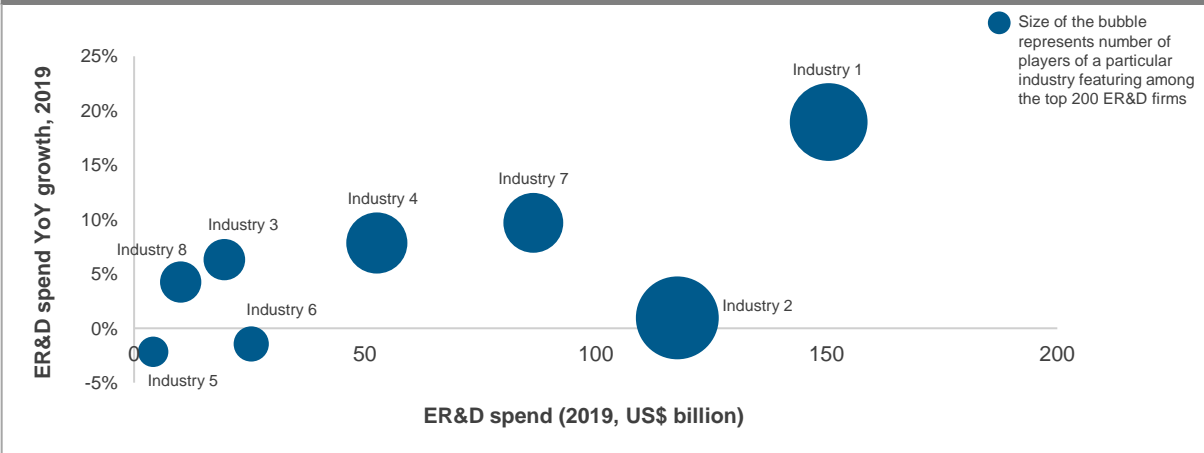
## ER&D top 200 overview



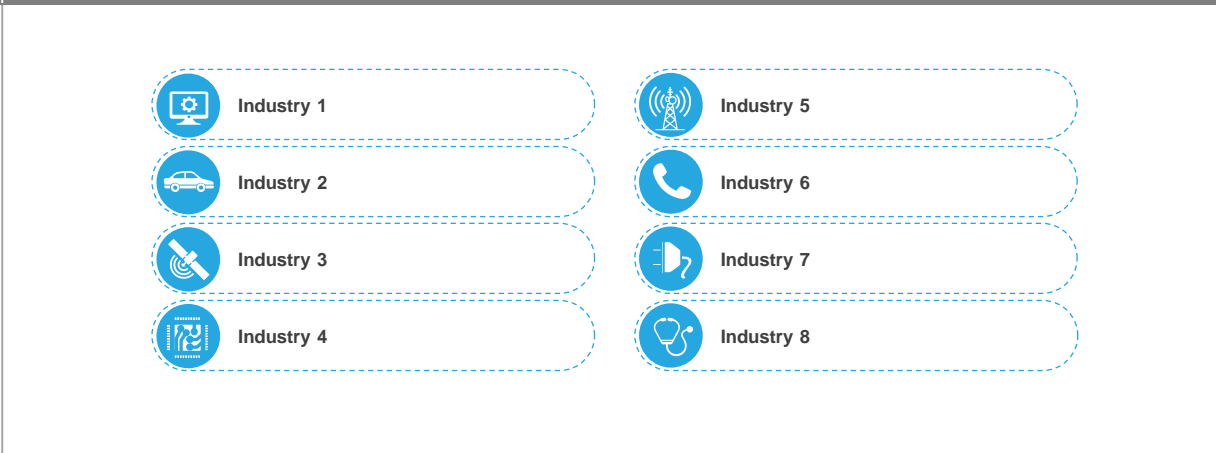
## Spend intensity for industry verticals



## ER&D YoY growth and spend snapshot by industry



## Key ER&D investment priorities across sectors





# Research calendar

## Engineering services

■ Published
 ■ Planned
 ■ Current release

### Flagship Engineering Services reports

	Release date
Verification & Validation Engineering Services PEAK Matrix® Assessment	January 2020
Industry 4.0 Services PEAK Matrix® Assessment: The Transformational Leap in Cyber-physical Convergence	September 2020
Semiconductor Engineering Services PEAK Matrix® Assessment	Q1 2021
Software Product Engineering Services PEAK Matrix® Assessment	Q1 2021

### Thematic Engineering Services reports

	Release date
Global Services Market Pressing Issues in 2020: Enterprises Engineering Perspective	February 2020
Digital Engineering: An Opportunity Unparalleled	February 2020
Engineering ER&D (ER&D) in 2020: Who Will Move My Cheese?	February 2020
A Framework-driven Approach for Verification and Validation (V&V) of IoT Systems	May 2020
The Future of Mobility – on the Cusp of the Electrification Revolution	May 2020
Engineering the 5G World	June 2020
Engineering Services Skills Handbook: Preparing for the Next Wave of Growth in Global ER&D	July 2020
Leading European Locations for Global Delivery of Engineering Services	October 2020
Cloud Engineering – The Center Stage of Global ER&D	November 2020
<b>Leading the Pack: Trends for the Top 200 Engineering Research &amp; Development (ER&amp;D) Enterprises</b>	<b>January 2021</b>
Digital Twins and their Adoption Across Industries	Q1 2021

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