



UK Research
and Innovation

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Country Prioritisation Data Pack

January 2026

Explanation of ask

- Ask from CEO, ExCo and UKRI Board for UKRI to have a clear understanding of who our priority international partners are, with whom we should be more focussed and strategic in our engagement.
- Cross-UKRI picture, based on quantitative and qualitative framework that considers:
 - Current engagement, through both targeted and investigator-led opportunities; future opportunities; alignment with government priorities; broader factors such as access to markets, investment and so on; other enabling or inhibiting factors.

Process for country prioritisation

Bring together data and insights aligned to the UKRI mission,...

Advancing knowledge

- Existing Research Council collaborations
- UK publication collaboration
- Research potential
- Emerging research leaders

Improving Lives

- Existing collaboration in the IS-8 sectors
- DBT country assessment

Driving Growth

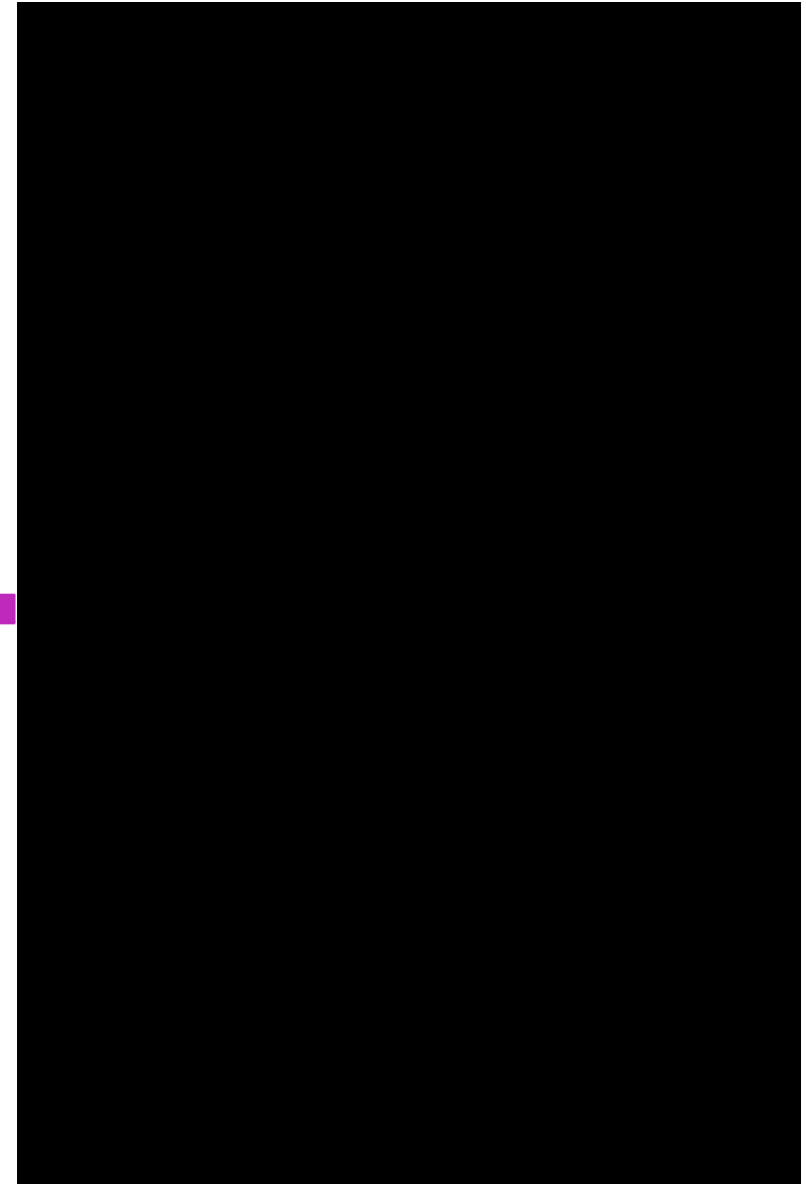
- Existing IUK collaboration
- Global Innovation Index
- HMG Hinge Market Status
- DBT Global Trade outlook



... enhance this with the contextual knowledge held within councils around domain-specific priorities and enabling or inhibiting factors,...



... and engage with key HMG stakeholders (e.g. FCDO, DBT, DSIT) to understand alignment with their priorities...



Timeline

- Deadline for initial returns – 28th January
- International Committee discussion – 5th February
- ExCo discussion – 24th February
- UKRI Board – 18th March

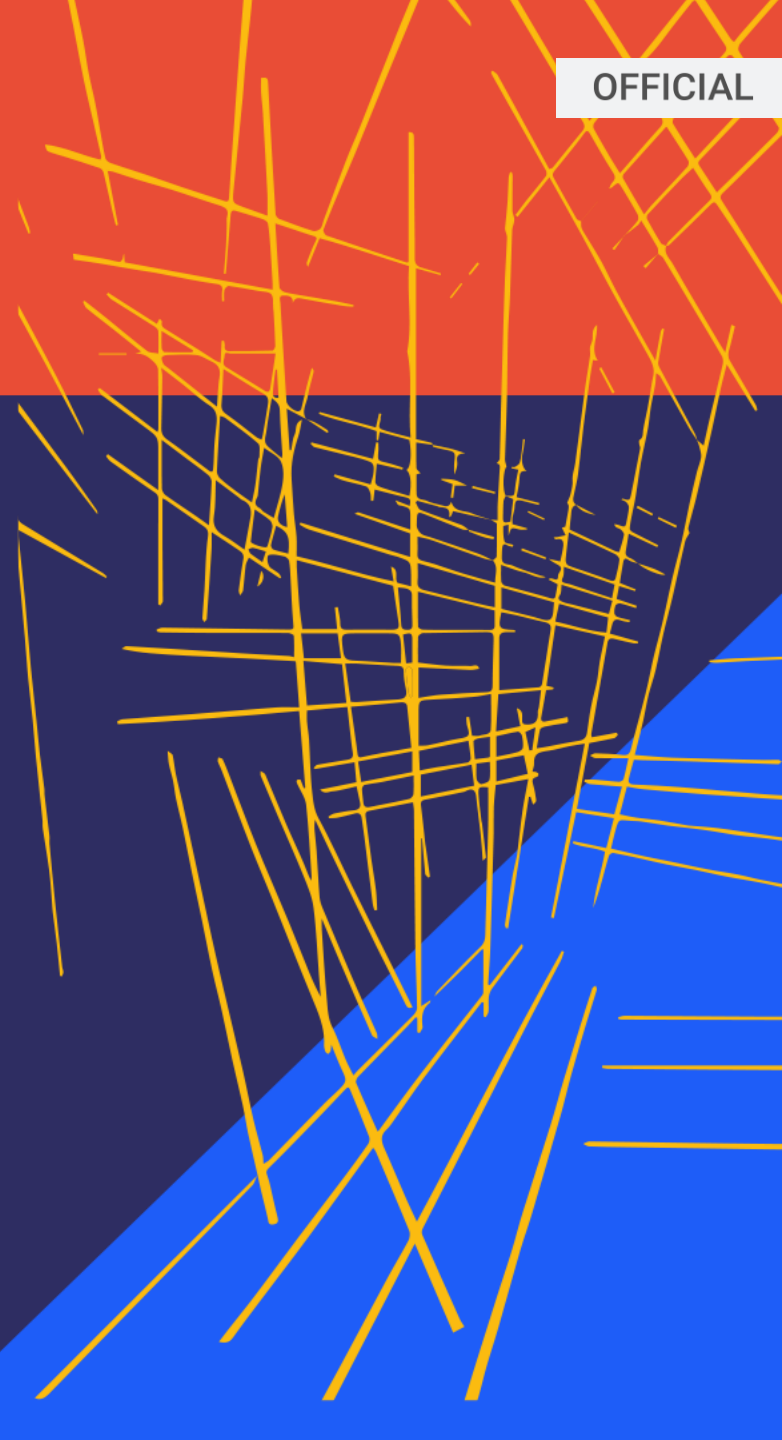


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Advancing knowledge

Global research leaders



Data Notes

The next slides shows countries with a top 20 ranking in any of the following:

Research Council collaboration rank	Based on the number of new RC awards in 2023 and 2024 with a staff or project partner in that country named on the award
UK collaboration rank	Based on the number of publications with the UK between 2020-24 that include a co-author in that country
Research potential rank	Each country is ranked based on the mean of their respective ranks across: •Capacity (how many researchers and how much money they spend on R&D); •Intensity (the % of GDP spent on R&D); •Quality (the number of citations). Only non-null ranks are used (so if there's no data for one of the ranks, it doesn't affect their average) *Note that the UK holds the number 4 rank and is not included in the table.

Growth in publications (2020-24) and Publications with the UK (2020-24) are shown to provide additional context to the research landscape but are not used in determining which countries appeared in this list.

Country	RC Collab Rank		Research potential rank	
United States	1		1	
Germany	2		2	
China	15		2	
Korea, Republic of	26		2	
Japan	14		3	
France	3		5	
Canada	6		6	
Sweden	13		6	
Netherlands	4		7	
Taiwan, Province of China	34		7	
Switzerland	5		8	
Australia	8		8	
Belgium	11		8	
Israel	27		9	
Italy	7		10	
Spain	9		11	
Denmark	12		12	
Austria	20		12	
Türkiye	29		13	
Brazil	19		14	
Poland	41		14	
Russian Federation			15	
India	16		16	
Singapore	21		16	
Finland	22		16	
Norway	17		17	
Portugal	44		18	
Czechia	27		19	
Egypt	64		19	
Iran, Islamic Republic of	74		20	
Ireland	10		22	
South Africa	18		29	

Comparing collaborators on Research Council grants with whom the UK research community more broadly are co-publishing with, some interesting points to note:

- **China** (2nd for UK vs 15th for RCs), **Italy** (4th vs 7th) and **India** (12th vs 16th) are all higher ranked in terms of overall UK collaboration than as RC collaborators
- On the other hand, the **Netherlands** (9th vs 4th), **Switzerland** (10th vs 5th) and **Ireland** (17th vs 10th) are more prominent in the RC portfolio.

Country	RC Collab Rank
United States	1
Germany	2
France	3
Netherlands	4
Switzerland	5
Canada	6
Italy	7
Australia	8
Spain	9
Ireland	10
Belgium	11
Denmark	12
Sweden	13
Japan	14
China	15
India	16
Norway	17
South Africa	18
Brazil	19
Austria	20
Singapore	21
Finland	22
Korea, Republic of	26
Israel	27
Czechia	27
Türkiye	29
Taiwan, Province of China	34
Poland	41
Portugal	44
Egypt	64
Iran, Islamic Republic of	74
Russian Federation	

Comparing our score of research potential with collaborators on Research Council grants, some interesting points to note:

- A number of countries in **Asia** (notably **Korea, Japan, China** and **Taiwan**) score very highly in terms of research potential relative to their prominence in the RC portfolio.
- **Israel** too has a significant disparity.

Country	RC Collab Rank		Research potential rank
United States	1		1
Germany	2		2
China	1		2
Korea, Republic of	2		2
Japan	1		3
France	3		5
Canada	6		6
Sweden	1		6
Netherlands	4		7
Taiwan, Province of China	3		7
Switzerland	5		8
Australia	8		8
Belgium	1		9
Israel	2		9
Italy	7		10
Spain	9		11
Denmark	1		12
Austria	2		12
Türkiye	2		13
Brazil	1		14
Poland	4		14
Russian Federation			15
India	1		16
Singapore	2		16
Finland	2		16
Norway	1		17
Portugal	4		18
Czechia	2		19
Egypt	6		19
Iran, Islamic Republic of	7		20
Ireland	1		22
South Africa	1		29

Collaboration by councils (top 10)

Rank	Country	AHRC Count	Country	BBSRC Count	Country	EPSRC Count	Country	ESRC Count	Country	MRC Count	Country	NERC Count	Country	STFC Count
1	US	55	US	62	US	304	US	31	US	96	US	94	US	13
2	Germany	50	Germany	27	Germany	169	Germany	24	Germany	29	Germany	39	Canada	4
3	Italy	17	Canada	21	France	78	Netherlands	12	France	26	France	30	Switzerland	4
4	Ireland	16	France	17	Switzerland	73	France	11	Netherlands	24	Norway	23	Italy	3
5	France	15	Australia	16	Netherlands	67	Canada	10	Switzerland	24	Canada	21	France	2
6	Australia	14	Switzerland	16	Italy	62	Australia	10	South Africa	19	Spain	17	Australia	2
7	Netherlands	14	Spain	14	Canada	55	Brazil	10	Italy	19	Netherlands	15	Ireland	2
8	Canada	13	Japan	14	Belgium	49	Taiwan	7	Canada	17	Switzerland	15	Finland	2
9	India	12	Netherlands	12	Ireland	49	Ireland	6	Australia	17	Australia	15	Germany	1
10	Norway	10	Italy	11	Spain	47	Denmark	6	Uganda	16	India	14	India	1

Collaboration by councils (compared RC Collab Rank)

[illegible]

Emerging research leaders

Whilst research output has grown globally, growth rates have been particularly high amongst Low and Middle Income Countries (LMICs): in 2024, 56% of authors were affiliated with institutions in LMICs compared with 13% in 1994.

Looking only at the top 20 countries, the rise of **China**, **India** and **Indonesia** as research producers is particularly notable.

Collaboration by councils (compared Research Potential)

Country	Research potential rank	AHRC Count	AHRC Rank	BBSRC Count	BBSRC Rank	EPSRC Count	EPSRC Rank	ESRC Count	ESRC Rank	MRC Count	MRC Rank	NERC Count	NERC Rank	STFC Count	STFC Rank
United States	1	55	1	62	1	304	1	31	1	96	1	94	1	13	1
Germany	2	50	2	27	2	169	2	24	2	29	2	39	2	1	9
China	2	5	19	4	16	39	12	2	23	5	25	10	13	0	
Korea, Republic of	2	2	37	1	25	13	22	4	14	0		1	36	0	
Japan	3	2	37	14	7	33	14	3	18	9	18	7	19	0	
France	5	15	5	17	4	78	3	11	4	26	3	30	3	2	5
Canada	6	13	8	21	3	55	7	10	5	17	8	21	5	4	2
Sweden	6	3	24	6	14	33	14	5	11	12	12	11	11	0	
Netherlands	7	14	6	12	9	67	5	12	3	24	4	15	7	1	9
Taiwan, Province of China	7	0		0		5	36	7	8	0		1	36	1	9
Switzerland	8	7	13	16	5	73	4	2	23	24	4	15	7	4	2
Australia	8	14	6	16	5	36	13	10	5	17	8	15	7	2	5
Belgium	8	8	11	9	11	49	8	5	11	11	14	10	13	0	
Israel	9	3	24	1	25	12	25	2	23	3	30	1	36	0	
Italy	10	17	3	11	10	62	6	3	18	19	6	11	11	3	4
Spain	11	6	15	14	7	47	10	4	14	10	16	17	6	0	
Denmark	12	6	15	8	12	41	11	6	9	10	16	10	13	0	
Austria	12	3	24	2	20	25	16	3	18	2	38	5	21	0	
Türkiye	13	6	15	1	25	3	42	2	23	2	38	0		0	
Brazil	14	7	13	3	19	11	27	10	5	7	20	10	13	0	
Poland	14	2	37	0		6	33	0		2	38	2	33	0	
Russian Federation	15														
India	16	12	9	2	20	17	18	4	14	12	12	14	10	1	9
Finland	16	1	49	0		17	18	3	18	2	38	5	21	2	5
Singapore	16	6	15	1	25	17	18	1	35	2	38	3	26	0	
Norway	17	10	10	5	15	18	17	0		5	25	23	4	0	
Portugal	18	0		1	25	8	30	0		0		1	36	0	
Czechia	19	2	37	0		13	22	0		1	54	4	24	0	
Egypt	19	1	49	0		2	45	0		0		0		0	
Iran, Islamic Republic of	20	1	49	0		1	54	0		0		0		0	
Ireland	22	16	4	7	13	49	8	6	9	13	11	9	17	2	5
South Africa	29	8	11	4	16	12	25	5	11	19	6	7	19	1	9
Kenya	37	4	20	0		4	37	2	23	11	14	3	26	0	
Uganda	56	3	24	0		2	45	4	14	16	10	0		0	

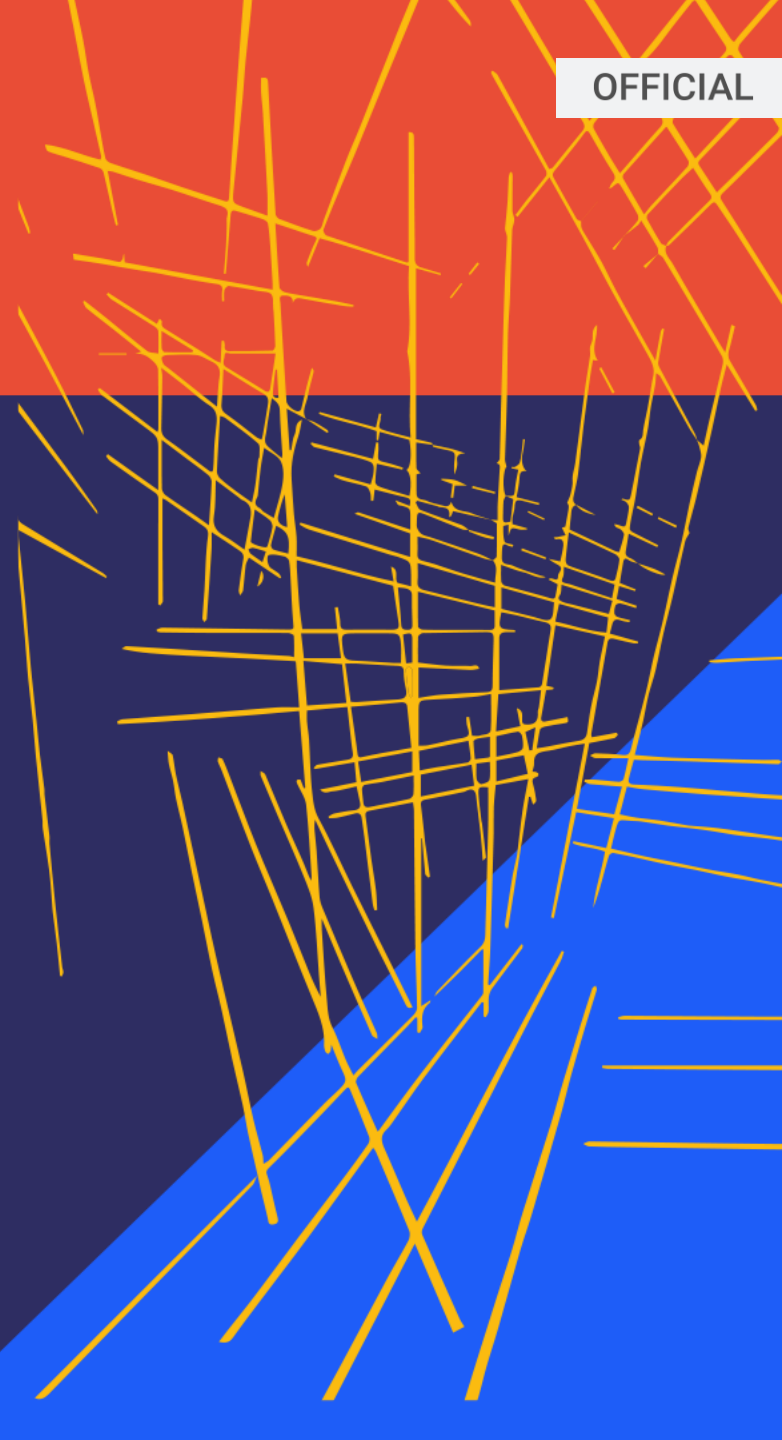


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Improving lives

R&I in the Industrial Strategy Sectors



Data Notes

This section brings together three data sources:

1. Research Council awards

- This is based on a LLM classification of the Research Council portfolio to the IS-8 sectors.
- New awards in 2023 & 2024.
- Collaborating countries are identified through the location of staff and project partners named on the award.

2. Innovate UK Global Portfolio

- Dataset shared by the IUK Global team.
- It includes awards made directly through global programmes, it does not include other IUK awards which might include overseas partners.
- IS-8 sectors identified through tagging by the IUK Global team.

Industrial Strategy Sector (IS-8) Research Council Collaboration Comparison

The **US** ranked 1st in collaborations across all IS-8 sectors, with 583 total collaborations across all councils.

China ranked 3rd in number of collaborations in the Clean Energy sector, but ranks relatively low in all other sectors, apart from Professional and Business Service. Although note that China overall has much fewer collaborations (48) than the US.

Note that the number of overall collaborations in the Professional and Business Service and Financial Services sectors for any country was low; as such they figures should be used with caution. See following slides for details.

Country	Total RC IS:8 Collab Counts	AM: RC Collab Rank	CE: RC Collab Rank	CI: RC Collab Rank	DNS: RC Collab Rank	DT: RC Collab Rank	FS: RC Collab Rank	LS: RC Collab Rank	PBS: RC Collab Rank
United States	583	1	1	1	1	1	1	1	1
Germany	253	2	2	2	2	2	2	2	2
France	138	3	5	3	5	4	5	4	3
Netherlands	118	5	9	5	4	8	2	4	#N/A
Switzerland	149	6	12	12	3	3	5	3	#N/A
Italy	104	9	14	3	7	6	5	4	6
Canada	106	13	8	5	7	5	2	8	#N/A
Australia	97	9	9	9	10	6	#N/A	7	6
Denmark	74	7	6	10	9	13	5	11	3
Ireland	81	13	6	7	17	9	5	10	6
Sweden	68	9	13	15	6	12	5	13	6
Spain	66	7	4	10	19	14	#N/A	14	#N/A
Belgium	83	4	14	19	13	11	#N/A	9	#N/A
Japan	57	12	9	19	10	9	#N/A	21	#N/A
India	53	15	21	7	17	14	#N/A	15	#N/A
China	48	20	3	19	19	16	#N/A	17	6
Singapore	37	16	17	12	13	16	5	27	#N/A
Norway	36	#N/A	14	12	10	21	5	21	3
Austria	25	20	17	#N/A	#N/A	18	5	20	#N/A
South Africa	30	18	#N/A	15	#N/A	#N/A	5	11	#N/A
Brazil	23	31	#N/A	15	26	27	5	18	6
Korea, Republic of	20	16	21	#N/A	19	25	#N/A	44	#N/A
Taiwan	17	20	#N/A	#N/A	19	23	#N/A	44	#N/A
Luxembourg	16	#N/A	#N/A	#N/A	13	18	#N/A	#N/A	6
Bangladesh	16	20	#N/A	19	#N/A	#N/A	#N/A	18	#N/A
Uganda	13	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A	16	#N/A
Türkiye	14	26	21	15	#N/A	43	#N/A	31	6
Thailand	6	20	17	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A
New Zealand	8	#N/A	#N/A	19	#N/A	#N/A	#N/A	31	6
Viet Nam	5	18	#N/A	#N/A	#N/A	43	#N/A	#N/A	#N/A
Portugal	5	20	#N/A	#N/A	26	#N/A	#N/A	#N/A	#N/A
Hong Kong	8	31	#N/A	#N/A	19	#N/A	5	#N/A	6
Kenya	3	#N/A	#N/A	19	#N/A	#N/A	#N/A	#N/A	6
Pakistan	4	#N/A	#N/A	#N/A	#N/A	#N/A	5	44	#N/A
Lebanon	1	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A	6
Peru	1	#N/A	#N/A	#N/A	#N/A	#N/A	5	#N/A	#N/A

Advanced Manufacturing

The top role of the **US** and **Germany** in the RC collaboration portfolio [redacted]
[redacted]; there is less alignment with the IUK portfolio although it is worth noting that numbers here are small.

China [redacted]
[redacted] is largely absent from the current UKRI portfolio.

Country	AM: RC Collab	AM: RC Collab Rank	AM: IUK Collab	AM: IUK Rank
United States	65	1	3	7
Germany	34	2	7	4
France	17	3	1	10
Belgium	16	4		
Netherlands	14	5	5	5
Switzerland	12	6	3	7
Spain	10	7	1	10
Denmark	10	7		
Sweden	9	9	1	10
Italy	9	9		
Australia	9	9		
Japan	8	12		
Canada	7	13	16	1
Ireland	7	13		
India	6	15	16	1
Singapore	5	16	11	3
Korea, Republic of	5	16	4	6
South Africa	4	18		
Viet Nam	4	18		
Austria	3	20	2	9
Taiwan, Province of China	3	20	1	10
China	3	20		
Bangladesh	3	20		
Thailand	3	20		
Portugal	3	20		
Türkiye	2	26	1	10
Indonesia	2	26		
Finland	1	31	1	10
Israel	1	31	1	10
Greece	1	31	1	10
Brazil	1	31		
Hong Kong	1	31		
Egypt	1	31		

Clean Energy Industries

Germany [redacted] features highly in the RC collaboration portfolio (although less so for IUK). [redacted] **Norway** and **France** – are less prominent.

Country	CE: RC Collab	CE: RC Collab Rank	CE: IUK Collab	CE: IUK Rank
United States	41	1	17	1
Germany	22	2	5	7
China	15	3	1	15
Spain	13	4	3	10
France	11	5		
Ireland	10	6		
Denmark	10	6		
Canada	9	8	3	10
Australia	8	9	8	4
Netherlands	8	9	3	10
Japan	8	9	2	13
Switzerland	7	12	4	8
Sweden	6	13		
Norway	5	14	4	8
Italy	5	14		
Belgium	5	14		
Singapore	3	17	12	3
Finland	3	17	1	15
Austria	3	17		
Thailand	3	17		
India	2	21	13	2
Korea, Republic of	2	21	7	5
Türkiye	2	21		
Saudi Arabia	1	28		
Taiwan, Province of China			6	6
Israel			2	13
Portugal			1	15
Greece			1	15
Indonesia				
Egypt				
United Arab Emirates				

Creative Industries

The **United States** ranks top for the RCs, IUK **Germany** is with a strong existing RC connection.

Country	CI: RC Collab	CI: RC Collab Rank	CI: IUK Collab	CI: IUK Rank
United States	28	1	4	1
Germany	18	2		
France	11	3		
Italy	11	3		
Canada	10	5		
Netherlands	10	5		
India	9	7		
Ireland	9	7		
Australia	8	9		
Spain	6	10	1	4
Denmark	6	10		
Switzerland	4	12	3	2
Singapore	4	12		
Norway	4	12		
Sweden	3	15		
Türkiye	3	15		
South Africa	3	15		
Brazil	3	15		
China	2	19	1	4
Japan	2	19		
Greece	2	19		
Belgium	2	19		
New Zealand	2	19		
Kenya	2	19		
Mexico	2	19		
Bangladesh	2	19		
Argentina	2	19		
Ukraine	2	19		
Finland	1	29	1	4
Korea, Republic of			3	2
Pakistan				
Luxembourg				
Poland				

Defence and National Security

Germany is a key collaborator for the RCs, [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Country*	DNS: RC Collab	DNS: RC Collab Rank	DNS: IUK Collab	DNS: IUK Rank
United States	98	1	1	1
Germany	34	2		
Switzerland	20	3		
Netherlands	19	4	1	1
France	15	5		
Sweden	11	6		
Canada	10	7	1	1
Italy	10	7		
Denmark	9	9		
Australia	8	10		
Japan	8	10		
Norway	8	10		
Singapore	7	13	1	1
Belgium	7	13		
Finland	7	13		
Luxembourg	7	13		
India	6	17	1	1
Ireland	6	17		
Taiwan, Province of China	5	19	1	1
Israel	5	19		
China	5	19		
Korea, Republic of	5	19		
Spain	5	19		
Hong Kong	5	19		
Portugal	2	26	1	1
Brazil	2	26		
Türkiye				
Indonesia				
Argentina				

Digital and Technologies

The **United States** and **Germany** are both key players for [REDACTED] the RCs. However, **Ireland**, [REDACTED] [REDACTED] is less prominent in the existing portfolio.

[REDACTED] Germany features strongly in the existing IUK portfolio.

Country	D&T: RC Collab	D&T: RC Collab Rank	D&T: IUK Collab	D&T: IUK Rank
United States	165	1	3	14
Germany	76	2	22	3
Switzerland	52	3	17	5
France	39	4	4	11
Canada	31	5	42	1
Australia	25	6	4	11
Italy	25	6	1	18
Netherlands	23	8	6	8
Japan	22	9	6	8
Ireland	22	9	1	18
Belgium	18	11	1	18
Sweden	17	12	1	18
Denmark	14	13	5	10
India	13	14	7	7
Spain	13	14	2	15
Singapore	10	16	26	2
China	10	16		
Israel	8	18	2	15
Luxembourg	8	18		
Austria	8	18		
Norway	7	21	1	18
Taiwan, Province of China	6	23	13	6
Korea, Republic of	5	25	18	4
Brazil	4	27		
Poland	2	34	1	18
Cyprus	2	34	1	18
Türkiye	1	43	4	11
Viet Nam	1	43	2	15
United Arab Emirates	1	43	1	18
Latvia	1	43	1	18

Future Technologies

Country	Count Collabs	Artificial Intelligence	Cybersecurity	Engineering Biology	Future Telecoms	Quantum	Semiconductors
United States	171	78	19	12	16	28	18
Germany	85	34	7	4	6	20	14
Switzerland	56	21	4	6	2	15	8
France	44	15	3	6	4	8	8
Canada	36	19	1	1	3	7	5
Italy	28	13	3	2	1	7	2
Australia	27	13	3	1	n/a	6	4
Ireland	26	10	1	3	3	3	6
Netherlands	26	10	3	3	2	4	4
Japan	24	5	1	8	3	3	4
Belgium	22	5	3	4	3	3	4
Sweden	17	7	4	1	2	3	n/a
Denmark	14	5	1	3	1	2	2
Spain	14	2	n/a	3	1	5	3
India	13	8	1	1	n/a	1	2
China	11	5	n/a	n/a	2	2	2
Luxembourg	11	2	3	n/a	3	3	n/a
Austria	10	3	n/a	1	n/a	2	4
Finland	10	3	n/a	n/a	2	3	2
Singapore	10	3	2	2	n/a	2	1
Israel	9	2	3	1	1	2	n/a
Norway	7	5	1	n/a	1	n/a	n/a
Taiwan	7	1	3	n/a	n/a	2	1
South Africa	6	3	n/a	2	n/a	1	n/a
Czechia	6	1	2	n/a	1	n/a	2
Brazil	4	4	n/a	n/a	n/a	n/a	n/a
Hong Kong	4	2	n/a	n/a	1	n/a	1
Korea, Republic of	4	2	1	1	n/a	n/a	n/a
Croatia	4	1	n/a	n/a	1	2	n/a
Portugal	4	1	n/a	1	n/a	1	1



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Financial Services

It is worth being cautious about interpretation of this data due to the small size of the portfolio. However, the indication seems to be that there is reasonable alignment with the **United States**, **Germany** and **Switzerland** as [REDACTED] existing RC (and IUK) collaborators.

Country	FS: RC Collab	FS: RC Collab Rank	FS: IUK Collab	FS: IUK Rank
United States	5	1	1	1
Germany	2	2	1	1
Canada	2	2		
Netherlands	2	2		
Switzerland	1	5		
Singapore	1	5		
France	1	5		
Sweden	1	5		
Ireland	1	5		
Hong Kong	1	5		
Austria	1	5		
Finland	1	5		
Italy	1	5		
Denmark	1	5		
Norway	1	5		
South Africa	1	5		
Brazil	1	5		
Peru	1	5		
Pakistan	1	5		
Japan				
Spain				
Australia				
China				

Life Sciences

The **United States** and **Germany** show strong alignment as   RC collaborators (whilst also featuring in the IUK portfolio). **China** is an outlier.

Canada is IUK's top collaborator  whilst **Singapore** (IUK's 2nd highest collaborator) 

Country	LS: RC Collab	LS: RC Collab Rank	LS: IUK Collab	LS: IUK Rank
United States	177	1	15	5
Germany	64	2	16	4
Switzerland	53	3	21	3
Netherlands	42	4	9	6
France	42	4	1	22
Italy	42	4	1	22
Australia	38	7	6	7
Canada	37	8	41	1
Belgium	35	9	2	16
Ireland	25	10	2	16
South Africa	22	11	6	7
Denmark	22	11	1	22
Sweden	20	13	3	12
Spain	19	14	4	10
India	17	15	5	9
Uganda	13	16		
China	12	17		
Brazil	11	18		
Bangladesh	11	18		
Austria	10	20		
Japan	9	21	3	12
Norway	9	21	3	12
Singapore	7	27	22	2
New Zealand	5	31	3	12
Israel	5	31	2	16
Türkiye	5	31	2	16
Taiwan, Province of China	3	44	4	10
Korea, Republic of	3	44	2	16
Czechia	3	44		
Pakistan	3	44		
Estonia	2	53	2	16
Poland	2	53		

Professional and Business Services

It is worth being cautious about interpretation of this data due to the small size of the portfolio. The **United States, Ireland and China** [REDACTED] there is existing collaboration.

Country	PBS: RC Collab	PBS: RC Collab Rank	PBS: IUK Collab	PBS: IUK Rank
United States	4	1	1	2
Germany	3	2		
France	2	3		
Denmark	2	3		
Norway	2	3		
Australia	1	6	1	2
Ireland	1	6		
China	1	6		
Sweden	1	6		
Italy	1	6		
Türkiye	1	6		
Brazil	1	6		
New Zealand	1	6		
Hong Kong	1	6		
Kenya	1	6		
Lebanon	1	6		
Luxembourg	1	6		
Canada			2	1
Singapore			1	2
Korea, Republic of			1	2
Netherlands				
Belgium				
Switzerland				
Japan				
India				
United Arab Emirates				
Saudi Arabia				
South Africa				

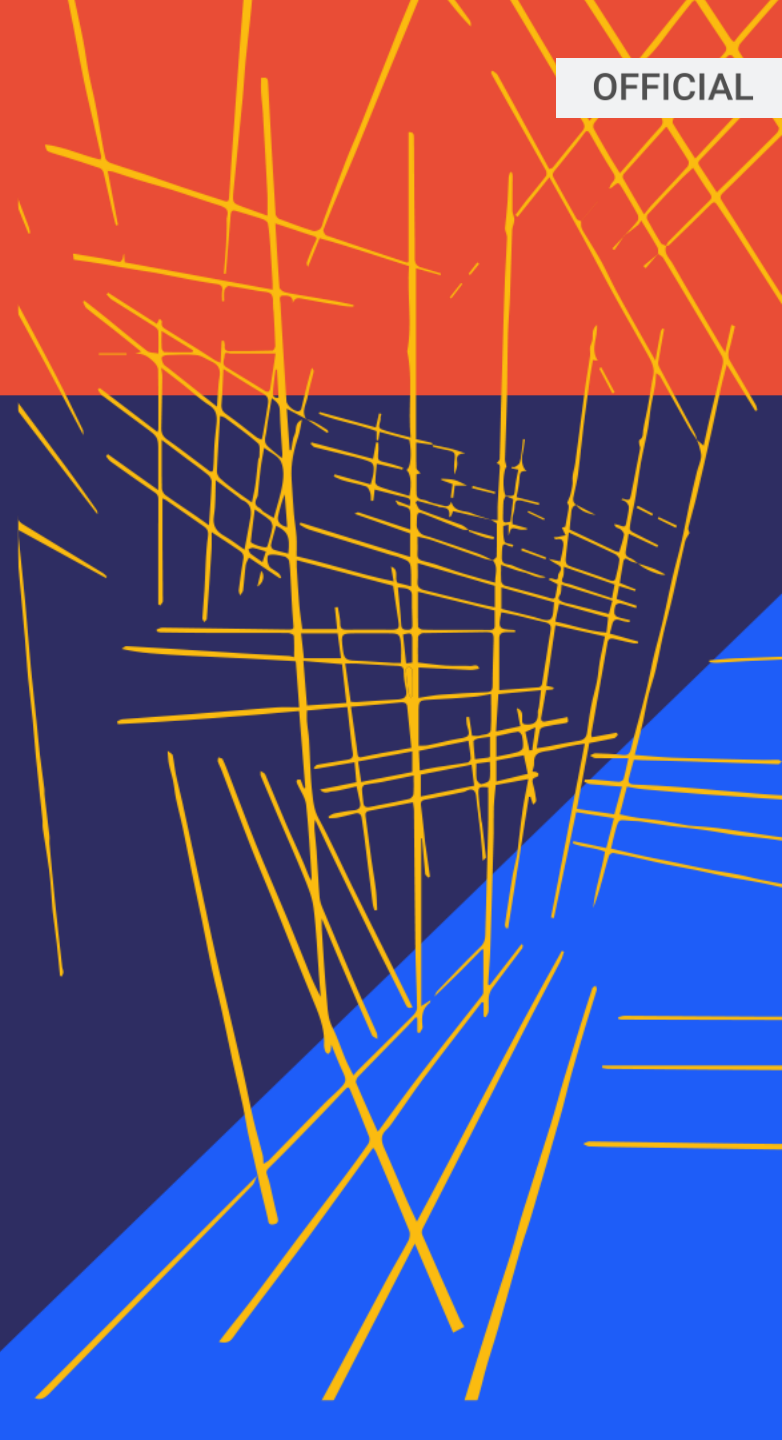


UK Research
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Driving growth

Innovation opportunities



Data Notes

The next slides shows countries which appear in one of the following lists

Innovate UK Collaboration	Top 20 country collaborator based on IUK Global Awards
Global Innovation Index	Ranked in the top 20 countries in the Global Innovation Index
IUK Priority Country	Cited as a priority focus country

Country	IUK Global Awards	IUK Collab Rank	Global Innovation Index Rank
United States	124	1	3
Canada	115	2	17
Singapore	75	3	5
Germany	59	4	11
Switzerland	49	5	1
India	47	6	38
Korea, Republic of	37	7	4
Netherlands	26	8	8
Taiwan, Province of China	26	8	
Australia	24	10	22
Japan	16	11	12
Spain	14	12	29
France	10	13	13
South Africa	9	14	61
Norway	8	15	20
United Arab Emirates	8	15	30
Denmark	7	17	9
China	7	17	10
Israel	7	17	14
Italy	7	17	28
Türkiye	7	17	43
Sweden	5	23	2
Finland	4	24	7
Ireland	4	24	18
Austria	4	24	19
Belgium	4	24	21
New Zealand	4	24	26
Saudi Arabia	4	24	46
Viet Nam	3	30	44

Country	IUK Global Awards	IUK Collab Rank	Global Innovation Index Rank
Estonia	2	32	16
Malaysia	2	32	34
Poland	2	32	39
Thailand	2	32	45
Brazil	2	32	52
Hong Kong	1	37	15
Qatar	1	37	48
Indonesia	1	37	55
Oman	1	37	69
Kuwait	1	37	73
Kenya	1	37	102
Nigeria	1	37	105
Philippines			50
Mexico			58
Egypt			86
Sri Lanka			93
Pakistan			99
Ghana			101
Bangladesh			106



Global Trade Outlook

DBT's Global Trade Outlook (June 2025) provides insights into expected future trends. Notably, in terms of share of global GDP (see chart to right):

- **India** is expected to overtake Germany and Japan to become the third largest economy by 2028, driven by continued population growth, as well as strong productivity growth.
- A combination of demographics, productivity and opportunities from shifting trade patterns will spur growth in other emerging **Indo-Pacific** economies, including Bangladesh, Indonesia, Vietnam and the Philippines.

In terms of trade:

- Within-region growth is expected to continue to dominate exports, with the trade of goods between European markets expected to be the largest trading relationship in 2050.
- Europe and the United States will account for 41% of total import growth by 2050, primarily in the services market, expensive consumer goods and some specialist manufacturing components. However, emerging markets will increasingly drive growth in foundational sectors.
- By 2050, Europe is expected to account for 43% of UK exports (down from 52% in 2023), a decline driven mainly by a rapid growth in demand from emerging markets, including South Asia (rising from 2% to 5%) and the Middle East (4% to 6%).

South Asia, China, and Africa offer the most rapid import growth opportunities for Industrial Strategy sectors, but growth is expected to be widely spread across regions

Figure 36: Growth in nominal USD imports, by IS sector and region, 2023 – 2035 growth

Import growth, 2023-2035	Europe	Latin America	North America	E. Europe & C. Asia	China & HK	Middle East	Africa	Asia Pacific	South Asia
Life sciences	57%	82%	74%	55%	41%	115%	154%	71%	86%
Advanced manufacturing	28%	75%	57%	43%	88%	91%	118%	88%	112%
Digital services	87%	12%	89%	53%	78%	39%	39%	54%	93%
Financial services	60%	81%	49%	169%	71%	90%	122%	67%	130%
Non-IS sectors	46%	60%	42%	55%	38%	91%	75%	52%	134%
Creative industries	110%	49%	59%	97%	76%	67%	104%	75%	177%
Professional & business services	94%	61%	55%	154%	121%	93%	78%	61%	312%

Note: Projections are not available for all of the UK's Industrial Strategy priority sectors (including Defence and Clean Energy industries). Data for Digital & Technologies only covers Digital sectors, and as such as the sector is marked as 'Digital services'. Definitions for Industrial Strategy sectors are approximations and do not align with formal definitions.

Source: DBT's Global Trade Outlook modelling. See Analytical Approach for further details.

