



**CREATIN**

**Leonardo Da Vinci**

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## **Regional Report**

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## **EXECUTIVE SUMMARY**

The aim of this document is to give information about the Northern region of the Netherlands: Friesland, one of the participating regions/partners in the CREATIN project.

This document will emphasize the current application of innovation within Dutch and Frisian SMEs. There will also be given information about the general economic situation in the Netherlands and Frisian SMEs.

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## 1. Introduction

This report will describe the current situation of innovation in Friesland and the characteristics of the enterprises situated in the region of Friesland. The report is divided in the following chapters:

1. Introduction. Project aims & objectives and the approach method are being described in this chapter.
2. The second chapter will describe the current situation of innovation in the Netherlands. The European Scoreboard for Innovation will be used to explain the Dutch situation in comparison with other EU countries. Besides of that, some local information about innovation will be given. At last the results of the CREATIN scorecard are being analysed of the Dutch results only.
3. This chapter gives an explanation about the general economic situation in the Netherlands.
4. This chapter explains the Small to Medium Sized Enterprises situation in Friesland as well in the Netherlands.

### 1.1. Project aims & objectives

The project aims to:

- To identify level of awareness and understanding in relation to creativity.
- To determine if strategies and policies for creativity are defined and implemented.
- To determine if creativity is encouraged and supported.
- To determine if creativity measures are perceived to be good for business.
- To identify barriers to effective creativity in European SMEs.
- To develop a knowledge repository to help people become more creativity and innovative.
- To promote good practices, key success factors and methodologies.

In line with the project aims, objectives were drawn up as follows:

- To improve awareness of creativity.
- To make creativity common practice in European SMEs.

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- To optimise knowledge, competencies and skills relating to creativity in European SMEs.
  - To help companies to operate faster, cheaper, smarter and better.

## **1.2. Approach method**

As one of the seven partners of the CREATIN project, Friesland had to collect a minimum of 15 surveys within Frisian SMEs. It was up to me to collect all the surveys. One of the conditions was that the target audience had to be innovation agents within technology and innovation providers, so I've collected the questionnaires within these demands. I haven't met any problems with collecting the surveys.

## 2. Innovation in the Netherlands.

### 2.1. The European Innovation Scoreboard (EIS)

The European Innovation Scoreboard provides a comparison of the innovation performance of the EU member states. The EIS 2008 includes innovation indicators and trend analyses for the EU member states. Based on the innovation performance across 29 indicators, EU member states fall into different groups. The Netherlands can be included in the group 'Innovation followers', together with Austria, Ireland, Luxembourg, Belgium and France. Being in this group means that the innovation performance is below the performance of the 'Innovation leaders' (Sweden, Finland, Germany, Denmark and the UK), but above the EU average. The Netherlands is performing relatively well in Finance and support but its growth is below average. Within this group, all Innovation followers perform above the EU average in the Innovators dimension except the Netherlands (slow grower), on the other hand the Netherlands is the only Innovation follower who has managed to improve its performance. In the figure below we can see that the Netherlands, as an innovation follower, can also be defined as a slow grower.

**TABLE 2: INNOVATION GROWTH LEADERS**

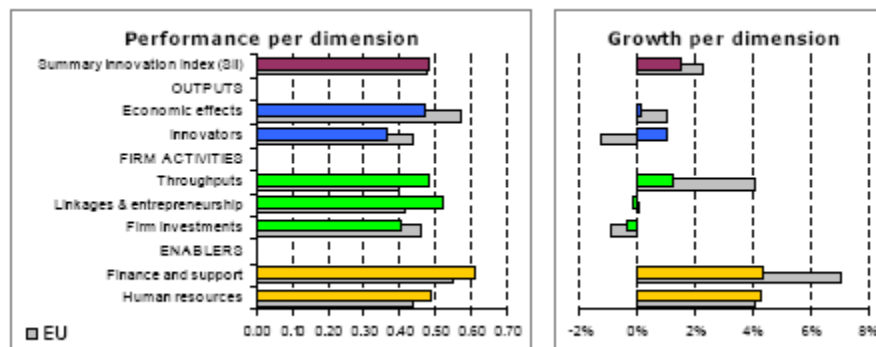
Group	Growth rate	Growth leaders	Moderate growers	Slow growers
Innovation leaders	1.6%	Switzerland (CH)	Germany (DE), Finland (FI)	Denmark (DK), Sweden (SE), United Kingdom (UK)
Innovation followers	2.0%	Ireland (IE), Austria (AT)	Belgium (BE)	France (FR), Luxembourg (LU), Netherlands (NL)
Moderate innovators	3.6%	Cyprus (CY), Portugal (PT)	Czech Republic (CZ), Estonia (EE), Greece (GR), Iceland (IS), Slovenia (SI)	Italy (IT), Norway (NO), Spain (ES)
Catching-up countries	4.1%	Bulgaria (BG), Romania (RO)	Latvia (LV), Hungary (HU), Malta (MT), Poland (PL), Slovakia (SK), Turkey (TR)	Croatia (HR), Lithuania (LT)

Average annual growth rates as calculated over a five-year period.

Within the group of 'Innovation followers', Ireland and Austria are the growth leaders. Belgium can be calculated as a moderate grower and France and Luxembourg are together with the Netherlands slow growers.

The EIS report has made country reports for each country, in this regional report I will conclude the country analysis of EIS for the Netherlands:

## NETHERLANDS



As already mentioned, the Netherlands is one of the Innovation followers. Its innovation performance is just above the EU27 average but the rate of improvement is below that of the EU27. Relative strengths, compared to the country's average performance, are in Finance and support and Linkages & entrepreneurship while relative weaknesses are in Firm investments and Innovators.

Over the past 5 years, Human resources and Finance and support have been the main drivers of the improvement in innovation performance, in particular as a result from strong growth in S&E and SSH graduates (11.3%), S&E and SSH doctorate graduates (6.8%) and Broadband access by firms (23.8%). Performance in Firm investments and Linkages & entrepreneurship has worsened, in particular due to a decrease in Non-R&D innovation expenditures (-1.5%) and the Firm renewal rate (-4.4%).

### Global Innovation Scoreboard

The new Global Innovation Scoreboard 2008 (GIS 2008) compares the innovation performance of the EU27 with the other major R&D spenders in the world: Argentina, Australia, Brazil, Canada, China, Hong Kong, India, Israel, Japan, New Zealand, Republic of Korea, Mexico, Russian Federation, Singapore, South Africa and the United States. The GIS 2008 methodology includes 9 indicators of innovation and technological capabilities:

Pillar	Indicator
Firm Activities and Outputs	Triadic patents per population (3 years average) Business R&D (BERD) as a % of GDP
Human Resources	S&T tertiary enrolment ratio Labour force with tertiary education (% total labour force) R&D personnel per population Scientific articles per population
Infrastructures and Broadband penetration per population Absorptive Capacity	ICT expenditures per capita Broadband penetration per population Public R&D (HERD + GERD) as a % of GDP

In the table below the Global Innovation Performance is summarized by showing their ranks for the GIS and each of the three pillars of the years 1995 until 2005:

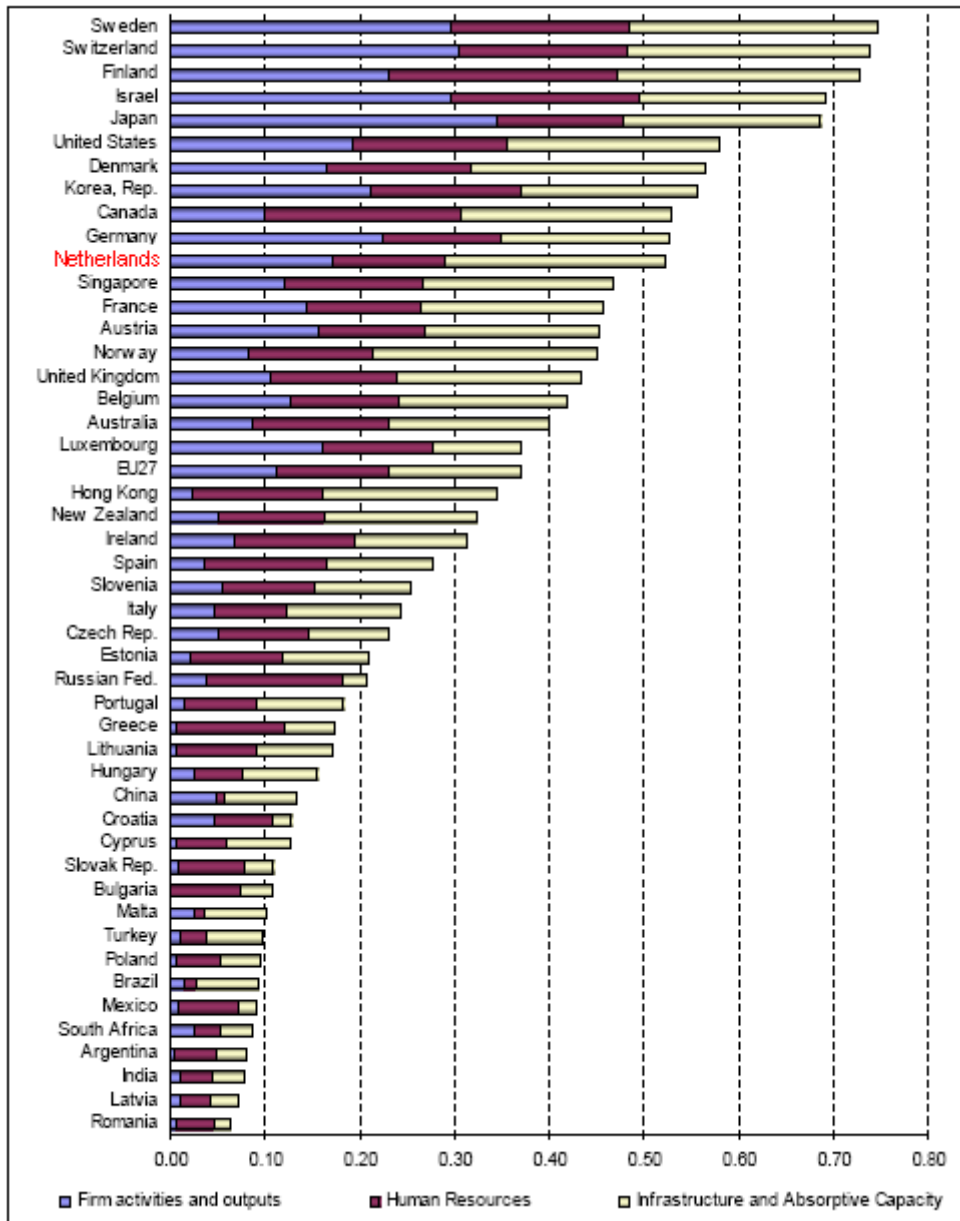
**Table 5: GIS: ranks and ranks variations<sup>26</sup> for each pillar, 1995 and 2005**

Country	GIS		Firm activities		Human Resources		Infrastructures and Absorptive Capacity	
	rank 2005	rank variation	rank 2005	rank variation	rank 2005	rank variation	rank 2005	rank variation
Sweden	1	0	4	-3	4	-2	1	1
Switzerland	2	0	2	0	5	-2	3	6
Finland	3	3	5	-1	1	3	2	12
Israel	4	1	3	4	3	-2	11	-7
Japan	5	-1	1	2	13	-3	9	-4
United States	6	-3	8	-2	6	-1	7	-6
Denmark	7	3	10	3	8	1	4	7
Korea, Rep.	8	4	7	5	7	10	14	-4
Canada	9	0	18	0	2	5	8	-1
Germany	10	-2	6	-1	17	-1	17	3
Netherlands	11	-4	9	1	20	-1	6	0
Singapore	12	7	15	6	10	11	10	2
France	13	-2	13	-4	18	-7	12	3
Austria	14	4	12	4	25	1	16	-8
Norway	15	2	20	-3	14	4	5	8
United Kingdom	16	-2	17	-3	12	2	13	9
Belgium	17	-4	14	-3	23	-11	18	3
Australia	18	-3	19	0	9	n/a	19	-3
Luxembourg	19	n/a	11	-3	21	19	n/a	n/a
EU-27	20	-3	16	-1	19	-4	21	-2
Hong Kong	21	n/a	32	2	n/a	n/a	15	-12
New Zealand	22	0	23	6	26	-18	20	3
Ireland	23	1	21	-1	16	7	23	1
Spain	24	6	28	0	15	10	24	4
Slovenia	25	-2	22	0	28	-4	25	-8
Italy	26	2	26	-3	32	-4	22	3
Czech Republic	27	4	24	0	29	0	28	6
Estonia	28	-2	33	4	27	0	27	-9
Russian Fed.	29	-2	27	-1	11	2	42	-3
Portugal	30	7	35	3	31	8	26	3
Greece	31	4	43	-8	24	8	35	-2
Lithuania	32	-3	41	5	30	-8	29	-3
Hungary	33	1	31	-1	38	-4	30	1
China	34	8	25	7	48	-3	31	9
Croatia	35	n/a	n/a	n/a	36	-5	43	0
Cyprus	36	5	42	2	37	0	33	5
Slovak Republic	37	-11	39	-12	34	-14	39	-12
Bulgaria	38	-5	47	-11	33	-3	37	-7
Malta	39	n/a	29	13	47	-1	n/a	n/a
Turkey	40	5	38	3	44	3	34	3
Poland	41	-3	45	-12	39	-1	36	-4
Brazil	42	5	34	11	46	2	32	10
Mexico	43	-2	40	3	35	0	44	-3
South Africa	44	n/a	30	1	45	-1	n/a	n/a
Argentina	45	-1	46	-7	40	3	41	-6
India	46	1	36	11	42	0	38	7
Latvia	47	-6	37	3	43	-7	40	-4
Romania	48	-12	44	-19	41	-8	45	-1

As we can see the GIS ranked the Netherlands on an 11<sup>th</sup> place.

The figure below shows the contribution of the countries mentioned above within the three pillars:

**Figure 14: Global Innovation Performance – 2005**



We can conclude that the Netherlands delivers most of its efforts in the pillar ‘infrastructure and absorptive capacity’ (rank 6, see table 5), secondly in ‘firm activities and outputs’ (rank 9) and third in ‘human resources’ (rank 20).

## 2.2. Technological Innovation

*“Fast growing companies are often innovative”*

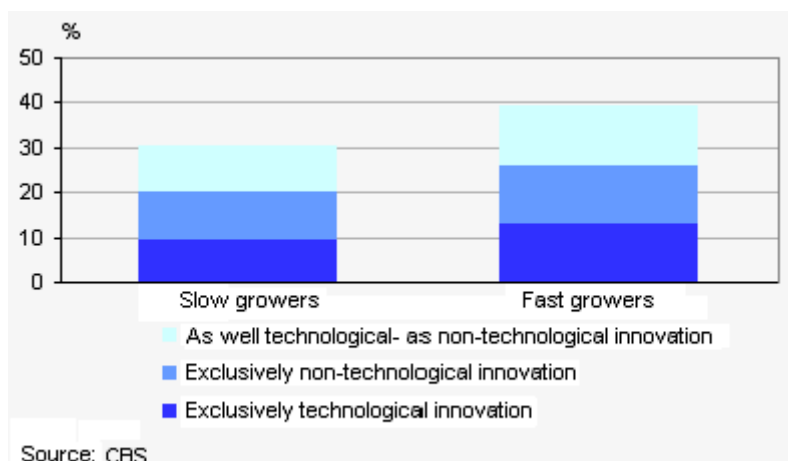
Publication from CBS

Approximately 40% of all fast growing companies are innovative. Companies who don't grow that fast have a rate of 30%.

The lead of fast growing companies counts as well for technological innovation as non-technological innovation.

Of all companies with technological innovation, fast growers spent 9% of their spending to innovation. This is the double than companies who don't grow that fast. The consequence is that fast growers have a larger turnover (23%) that exists out of innovative products than companies that grow slower (19%).

**Innovative companies:**



## 2.3. The status of innovation in the Netherlands

A research group called 'Six Fingers' is fulltime occupied with doing research to innovation in the Netherlands. For their most recent research they have spoken to innovative professionals for three months. They spoke with experts about innovation and with professionals of as well large and smaller organisations in different sectors. The conclusions of the research were formulated in some hypothesis described below:

- Organisations like to ask their customers how to innovate.
- Legislation is an important motivation to innovate.

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- Concept innovation becomes a larger part of innovation itself; which offers less competition and more diversity.
  - It is more difficult to innovate without the direct interference and support of a sponsor.
  - Organisations are not focusing enough on different forms of innovation.
  - Strong focus on risk, innovation may not fail.
  - Smaller organisations innovate less than larger organisations.

The overall conclusion is that in general a lot of organisations think that innovation is very important within their company. The focus on the desires of the customers, so doing market researching and adapting concept innovation is the Dutch way of innovating. It is also being considered easier to innovate with the direct interference and support of a sponsor.

#### **2.4. Dutch Innovative institutions**

In the Netherlands we can find several innovative companies/institutions/projects. In this sub chapter I will only give a short explanation of the most important ones.

- TCNN.

The mission of TCNN is to strengthen the North Netherlands by innovation and cooperation. To realize this, concrete cooperation projects are developed between the Northern SMEs and knowledge institutions. The content of the projects are economical, managerial and technological feasibility studies, even as technology projects and specific workshops.

- Syntens.

Syntens is an innovation network; they believe that permanent innovation is necessary for an international competitive position. They aim to intensify the innovation capacity of SMEs, so stimulate companies to innovate successfully and therefore contribute to a durable expansion. The past year, Syntens helped about 7604 entrepreneurs to innovate better, earlier and faster.

- The Innovation Platform.

The Innovation Platform aims to examine critically how the knowledge and innovation system functions and facilitate breakthroughs. The Platform is charged with the task of creating the conditions, establishing the

connections and developing the vision required to stimulate innovation and entrepreneurship in the Netherlands. This is the engine that drives productivity growth and economic development, which create prosperity and well-being.

## **2.5. Frisian conclusions CREATIN scorecard.**

In this last sub-chapter I will give a summary of the conclusions based on the Dutch results of the CREATIN scorecard. The conclusions are drawn up based on the sections of the scorecard: leadership, culture, structure, motivation and communication.

### Leadership:

- Strategies are most often defined within SMEs and communicated to all employees.
- Not everyone, but most leaders often set clear objectives to create a common vision.
- In almost all companies the top management promotes creativity and innovation.
- In all SMEs, leaders visibly drive innovation, except for one company.
- Senior management within Frisian SMEs are encouraging the submission of new product ideas.

### Culture:

- Frisian organisations culture promotes idea generation and a formal idea generation process is in place.
- All SMEs declare that there is a high level of trust within their organisation.
- Most companies involve the employees to participate in generating ideas.
- All SMEs are sharing information and knowledge throughout the company.
- What has been mentioned before is that all operations are driven by customers needs (sub-chapter 2.3).

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Structure:

- Almost all organisations have an organic and flexible structure.
- In all organisations the structure enables the voice of the customer to be captured effectively.
- Except for one, the structure in all organisations promotes idea generation and learning.
- In Frisian SMEs not all team members are empowered to make decisions, in most SMEs team member are empowered to do this.
- Throughout all organisations is a high level of co-operation across the whole organisation.

Motivation:

- Knowledge sharing and reuse is most of the time rewarded in Frisian SMEs, but not always.
- Except for one company, success is recognized in all companies.
- In most SMEs all team members are mutually accountable.
- Employees are given freedom to pursue their own ideas.
- In general failures and mistakes are tolerated and not punished, although it doesn't count for every company.

Communication:

- In the most companies the right information is available at the right time and in the right format.
- A lot of companies are forming alliances with other organisations for mutual benefit.
- Frisian SMEs declare that the communication among team members is efficient and effective.
- Information on ideas generated and problems raised are accessible to all in most companies.
- All individuals in Frisian companies collaborate to solve problems within their organisation.

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Overall conclusion: For SME companies in Friesland innovation is an important objective within their organisation. For the development of innovation, the voice/desires of the customer are essential.

What is very obvious is that in general Frisian companies find it important that all employees are involved to participate in the innovation process. Leaders are encouraging new innovative ideas and concepts, employees are given freedom to pursue their own ideas. So failures and mistakes are tolerated and not punished. Frisian SMEs also declare that the communication among team members is efficient and effective. On the other hand; all team members are mutually accountable.

Frisian SME structures can be called very flexible, involvement of all employees and the desires of customers are essential to generate innovation. Although the actual implementation of an innovation policy is more difficult than just think of ideas. But nevertheless, innovation stays an important drive for Frisian SMEs.

### **3. GENERAL ECONOMIC SITUATION**

The Netherlands has a prosperous and open economy, which depends heavily on foreign trade. The economy is noted for stable industrial relations, moderate unemployment and inflation, a sizable current account surplus, and an important role as a European transportation hub. Industrial activity is predominantly in food processing, chemicals, petroleum refining, and electrical machinery. A highly mechanized agricultural sector employs no more than 3% of the labour force but provides large surpluses for the food-processing industry and for exports.

The Netherlands, along with 11 of its EU partners, began circulating the Euro currency on 1 January 2002. The country continues to be one of the leading European nations for attracting foreign direct investment and is one of the five largest investors in the US. The economy experienced a slowdown in 2005 but in 2006 recovered to the fastest pace in six years on the back of increased exports and strong investment. Unemployment is at 4.0% of the labor force. By Euro Stat standards however, unemployment in the Netherlands is at only 2.9% - the lowest rate of all European Union member states.

#### **3.1. General economic situation in the North Netherlands**

The North of the Netherlands has relatively many SMEs. 78% of the total northern employment is situated in SMEs, therefore SMEs are even more important for the economy of this region than for the national economy (72%).

Companies with more than 200 employees are mainly located in the core zones (cities of Groningen, Leeuwarden, Heerenveen and Drachten).

There is a modest amount of international activity in this region. The international activity flows from and to the main economic area of the Netherlands — The Randstad — hardly pass through the region. So, most of the economic activity is by-passing the region.

Originally the northern part of the Netherlands had primarily an agricultural function, and the region is still the major agricultural region within the Netherlands. However, the agricultural sector has been under pressure because of the international competition and environmental restrictions. Therefore, the region also

had to develop itself in other directions, like economic growth and environmental development.

Since 1994, the Northern part of the Netherlands has a Business & Innovation Centre (BIC). The BIC is a concept framed by the European Committee to stimulate regional activity. BIC in the North of the Netherlands creates innovative & internationalising projects, advises and grants (fully & integrated) service on business creation in any way. The core of all activities of this BIC can be defined as knowledge transfer. The BIC strives to supply as many companies as possible with knowledge, so they become not only stronger in their own region, but also set foot on the international market.

The establishment climate in the Northern Netherlands is mainly defined by a number of positive factors: a relatively good labour market with sufficient highly qualified personnel, a good co-operative culture, a physical infrastructure that is free of traffic congestion, low land prices and housing costs and a high quality of life.

The standard of suppliers, the financing options and the availability of knowledge are also judged as being satisfactory to good.

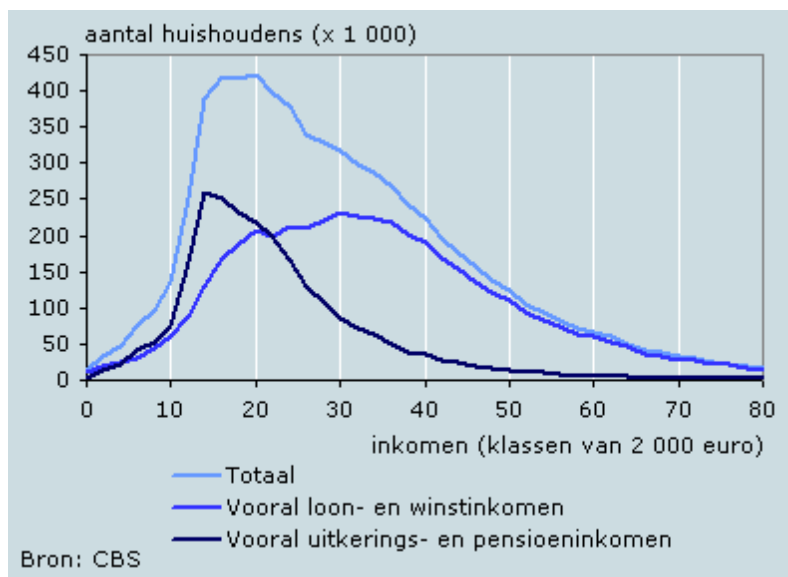
### **3.2. Demographic development**

The Netherlands is the twenty-third most densely populated country in the world. The 16,491,461 (February 2009) Dutchmen and women are concentrated on an area of 41,526 km<sup>2</sup>; this means that the country has a population density of 393/km<sup>2</sup> per km<sup>2</sup>, or 482/km<sup>2</sup> if only the land area, 33,883 km<sup>2</sup>, is counted.

Even though the Netherlands is so highly populated; there are no cities with a population over 1 million in the Netherlands. Instead 'four big cities' as they are called (Amsterdam, Rotterdam, The Hague and Utrecht) can in many ways be regarded as a single metropolitan area, the Randstad ('rim or edge city') with about 7 million inhabitants around an agricultural 'green heart' (het Groene Hart). The unity of this conurbation can be illustrated by the current idea effort to create a circular train system connecting the four cities.

### 3.3. Income

About 7 million households in the Netherlands had an average of approximately 31 thousand Euro to spend in 2008. The distribution of household income is very uneven. Only one in six households who depend on a pension or benefit for their income had an above average income. The highest average incomes were in households with breadwinners aged 50 to 55 years.



#### Highest incomes for 50 to 55 year-olds

Income levels change during the life course. Younger people experience substantial increases in income as they get better (paid) jobs or their wages are increased because of age or experience. At older ages people stop work or work part-time, which leads to a reduction in income levels. The highest average incomes are those in households with a breadwinner aged between 50 and 55 years. This group and the two flanking age groups are indeed relatively strongly represented among the high incomes.

### 3.4. Labour market situation

Labour market participation is high; even so, there are pockets of under-participation among various groups of the population

Dutch governments have successfully sought to encourage labour market participation. Recent measures include the closing of early-retirement routes and greater emphasis on activating (long-term) unemployed, the partially disabled and

social assistance recipients. Nonetheless, labour supply is still restrained by comprehensive social entitlements for those out of work, which benefit almost 17% of the working-age population. In addition, the tax-and-benefit system and labour-market policies continue to discourage participation of several groups and to incite working short hours.

### **3.5. Activity rate of employees in the Netherlands**

The Netherlands has a relatively low activity rate of just fewer than 60 per cent. Substantial differences exist between men and women, age groups, population groups of differing ethnic origin and levels of qualification.

In the case of men, the activity rate has fallen by 22% over the past 30 years (from 97% in 1960 to 75% in 1988), whereas among women it has risen (from 26 to 45%). Among men, the rate is highest in the 25-54 age group (around 90%), with a rate of less than 50% in the 15-24 and 55-64 age groups. For women, the rate is more or less equal in the 15-24 and 25-54 age groups (standing at slightly less than 50%), while in the 55-64 age group it is 10%, which is extremely low in comparison with, for example, Sweden, France and the USA. In the Netherlands the 1980 and 1990s were marked by a rapid influx of women into the labour market, chiefly in forms of flexible working and part-time jobs

The last 20 years have seen a process of displacement and over-skilling in the Dutch labour market. Lower-qualified workers have tended to be displaced by the more highly qualified. The areas of activity in which large numbers of lower-skilled workers used to be employed have declined in both absolute and percentage terms, whereas the reverse has happened with the areas of activity employing large numbers of more highly skilled workers. As a result, there is less employment available for the low-skilled. Apart from the absence of any increase in employment for them, in those areas of activity where they have formerly been present they are now being displaced by the more highly skilled. Consequently, it is among the low-skilled that most long-term unemployment is found.

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#### **4. SMALL TO MEDIUM ENTERPRISES SITUATION**

Friesland is a province that of old focused on the agriculture industry. Therefore agriculture and tourism are 2 important economical pillars. However the Frisian economy rapidly modernizes with growth in the service sector and ICT.

Agriculture and Industry are still slightly over represented in the Frisian economy, but the importance of both sectors is decreasing. Friesland has relatively many small & medium sized enterprises, which are responsible for 75% of the total employment in Friesland. The driving forces of the Frisian economy are:

- Industry
- Service Sector
- Transport
- Communication

The total amount of SMEs in Friesland is 59.046. These enterprises are mostly micro and small companies and are often located outside the urban areas on the so called industrial zone. These are zones outside the urban area where companies are centralized. These enterprises are a mix of micro and small companies. An also very common phenomenon is that enterprises are based in residential areas, in private houses. These companies are mostly micro enterprises, where the owner of the company started the business up from his own home.

##### **High potential growth**

The table below shows promising sectors which have promising prospects according the regional Chamber of Commerce. Other promising sectors in the Frisian economy are the Metal industry, Life sciences & Healthcare, ICT and Transport & Logistics.

Sectors with promising prospects:

	Importance on employment	Innovating capacity	Productivity	Contribution to the Frisian image
Water technology	+	+	+ -	++
Agribusiness	++	+ -	++	++
Service sector	++	+	+ -	+ -
Tourism and recreational	+	-	+ -	++

++ = Strong, + = Positive + - = Neutral \_+ = little

(Bron: Nota Sociaal-Economisch Beleid Provincie Friesland 2003-2006 pag. 16).

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