ETLA
ELINKEINOELÄMÄN TUTKIMUSLAITOS
THE RESEARCH INSTITUTE OF THE FINNISH ECONOMY
Lönnrotinkatu 4 B 00120 Helsinki Finland Tel. 358-9-609 900
Telefax 358-9-601 753 World Wide Web: http://www.etla.fi/

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Annu Kotiranta, Tuomo Nikulainen, Antti-Jussi Tahvanainen,
Matthias Deschryvere, and Mika Pajarinen

EVALUATING NATIONAL INNOVATION SYSTEMS – KEY INSIGHTS FROM THE FINNISH INNOEVAL SURVEY

ETLA, The Research Institute of the Finnish Economy – Lönnrotinkatu 4B,
FIN-00120 Helsinki, Finland. Tel: (+) 358-9-609 90 207, Fax: (+) 358-9-601 753,
e-mail: tun@etla.fi

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ABSTRACT: This paper aims to provide new insights into the analysis of National Innovation Systems (NIS). Whereas the common approach is to analyze specific parts or a defined set of actors and their interactions, this paper attempts to take a more systemic approach by analyzing results of 13 surveys directed to different sets of actors related to the Finnish NIS. The focus is on the overall complexity of the system, the demand- and user-based dimensions of innovative activities and policies, internationalisation of innovative activities, public support for high growth companies, regional innovation policies, and educational policies. The results are mostly descriptive and the emphasis is on the most important findings of the surveys. In addition to the main findings, the paper includes all questionnaires and a description of the complete data set.

KEYWORDS: National Innovation System, evaluation, Finland, survey

JEL-codes: O30, O38

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TIIVISTELMÄ: Tämä selvitys tarjoaa uusia näkökulmia kansallisten innovaatiojärjestelmien tutkimukseen. Selvitys analysoi ja tiivistää 13 yksittäistä, innovaatiojärjestelmän eri toimijoille suunnattua kyselyä hyödyntäen laaja-alaisempaa lähestymistapaa kuin perinteiset tutkimukset, jotka usein keskittyvät järjestelmän rajattuihin osa-alueisiin tai toimijaryhmiin. Selvityksessä perehdytään erityisesti innovaatiojärjestelmän kompleksisuuteen, innovaatiotoiminnan ja -politiikan kysyntä- ja käyttäjälähtöisyyteen sekä alueellisuuteen, innovaatiotoiminnan kansainvälistymiseen, lupaavien kasvuyritysten saamaan julkiseen tukeen, ja koulutuspolitiikkaan. Tulokset ovat pääosin kuvailevia, ja niiden raportoinnissa keskitytään vain näistä merkittävimpiin. Selvitys sisältää tulosten lisäksi myös alkuperäiset kyselyrungot ja kyselyillä tuotettujen aineistojen tyhjentävät kuvaukset.

AVAINSANAT: Kansallinen innovaatiojärjestelmä, arviointi, Suomi, kysely

JEL-koodit: O30, O38

GLOSSARY OF ACRONYMS

AKA	Academy of Finland	(Suomen Akatemia)
FFI	Foundation for Finnish Inventions	(Keksintösäätiö)
NIS	National Innovation System	(Kansallinen innovaatiojärjestelmä)
OPM	Ministry of Education	(Opetusministeriö)
PRO	Public Research Organisation	(Julkinen tutkimuslaitos)
RIC	Research and Innovation Council	(Tiede- ja innovaationeuvosto - TIN)
STM	Ministry of Social Affairs and Health	(Sosiaali- ja terveysministeriö)
TEM	Ministry of Employment and Economy	(Työ- ja elinkeinoministeriö)
TESI	Finnish Industry Investment Ltd	(Suomen Teollisuussijoitus Oy)
VM	Ministry of Finance	(Valtiovarainministeriö)
VTT	Technical Research Centre of Finland	(Valtion teknillinen tutkimuslaitos)

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1. INTRODUCTION

This paper presents some of the key findings from surveys conducted as part of the evaluation of the Finnish innovation system (see also www.evaluation.fi). The surveys were conducted in the spring of 2009 in order to map opinions about the current innovation system, discuss ongoing reforms, and collect specific information about the actors of the Finnish national innovation system (NIS). In total 13 different internet-surveys were sent out to over 10 000 actors of the Finnish innovation system. Participation turned out to be more than satisfying with the average response rate of the 13 surveys being nearly 40 %. In addition to companies utilizing the system, participants also comprised ministries, the higher education sector, intermediaries, financiers, municipalities, public research organisations, associations, and foundations. In this paper a selection of the most interesting results is picked out for closer examination. The paper has several appendixes: survey practicalities (Appendix I), tables of all results (II), figures of all results (III), survey questionnaires in English (IV), and survey questionnaires in Finnish (V).

Some of the 13 respondent groups are further divided or aggregated into groups for analytical purposes (see Appendix I). For example companies are divided according to their innovation activities (innovative and non-innovative companies) with innovative companies being further divided according to their size (less or more than 50 employees). Companies were considered innovative, if they performed innovation activities during the last three years. In similar fashion, public sector actors are divided into four subgroups. The first sub-group "education supporting organizations" includes the Academy of Finland (AKA) and the Ministry of Education (OPM), the second sub-group "innovation supporting organizations" includes the Finnish Funding Agency for Technology and Innovation (Tekes) and the Ministry of Employment and the Economy (TEM). A third sub- group "other ministries" includes all other ministries. The remaining governmental organizations, such as Finnish Industry Investment (TESI), Research and Innovation Council (RIC), and Sitra are categorized in a fourth sub-group "other public sector organizations". The regional innovation actors are referred to with the term "intermediaries" and can be divided into two groups, TE-centres (regional public Employment and Economic Development Centres) and other intermediaries. Last group consists of two sub-groups of private sector financiers: banks, and business angels and venture capitalists. The response rates for the aggregate groups are presented in Table 1.

Table 1 Number of respondents and response rate of the survey

	Answers	Sent	Resp. rate
Associations	26	68	38.2%
Companies	1026	8747	11.7%
Foundations	58	151	38.4%
Intermediaries	88	189	46.6%
Municipalities	80	315	25.4%
Private financiers	26	196	32.3%
Public actors	82	158	51.9%
Research organisations	14	29	48.3%
University department heads	219	541	40.5%
University rectors	28	45	62.2%
Total	1647	10439	39.5%
	(Total)	(Total)	(Average)

The aim of this paper is not to summarize all of the results but to highlight some key findings. For this reason the appendixes are frequently referred to for further details. In particular, Appendix II and Appendix III are cited to direct the reader to seek more statistics on individual questions. The citations to appendixes and specific questions are made in footnotes.

The rest of the paper is structured as follows. Section 2 discusses the complexity of the Finnish national innovation system and gives an overview of the overlapping activities of the different actors of the NIS. Section 3 discusses the demand- and user-driven aspects of innovation policies and companies' innovation activities. Section 4 highlights the international dimensions of innovative activities. Section 5 presents results related to growth entrepreneurship and financing. Section 6 focuses on regional dimensions of national innovation policies. Section 7 addresses aspects of the higher education system. And finally, Section 8 concludes with final remarks.

2. UNDERSTANDING THE COMPLEXITY OF NATIONAL INNOVATION SYSTEMS

"In order to meet global challenges, innovation policy must be broad-based and comprehensive. Piecemeal policy measures will not suffice in ensuring a pioneering position in innovation activity, and thus growth in national productivity and competitive ability."

– National Innovation Policy (2008)

2.1. Different opinions about the Finnish national innovation system

A national innovation system can be defined as follows:

- … the network of institutions in the public and private sectors, whose activities and interactions initiate, import, modify and diffuse new technologies. (Freeman, 1987)
- … the elements and relationships which interact in the production, diffusion and use of new, and economically useful, knowledge … and are either located within or rooted inside the borders of a nation state. (Lundvall, 1992)
- … a set of institutions whose interactions determine the innovative performance … of national firms. (Nelson, 1993)
- … the national institutions, their incentive structures and their competencies, that determine the rate and direction of technological learning (or the volume and composition of change generating activities) in a country. (Patel and Pavitt, 1994)
- … that set of distinct institutions which jointly and individually contribute to the development and diffusion of new technologies and which provides the framework within which governments form and implement policies to influence the innovation process. As such it is a system of interconnected institutions to create, store and transfer the knowledge, skills and artefacts which define new technologies. (Metcalfe, 1995)

Source: Wikipedia

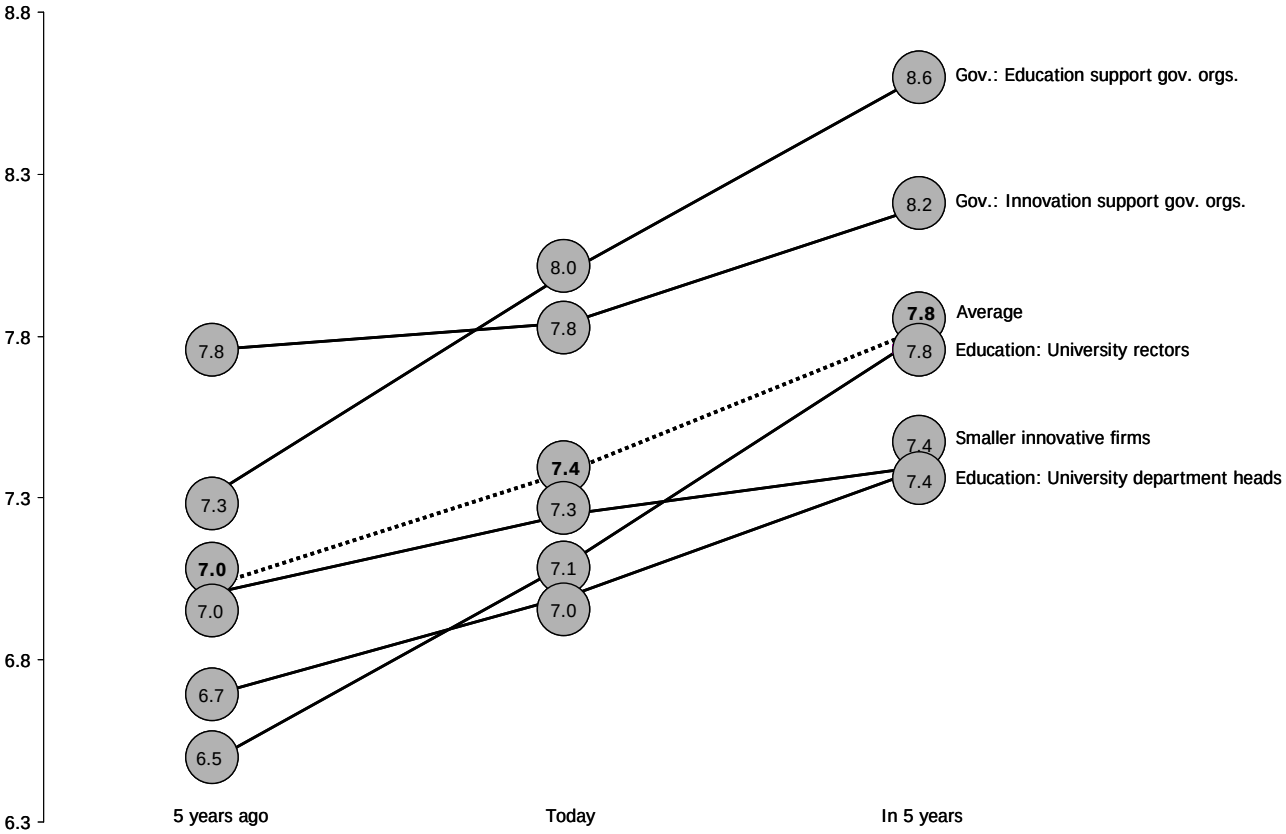
Based on these conceptualisations, one could state that a national innovation system can be loosely defined as the interaction and flow of information, resources and technology between individuals, companies and institutions involved in the innovative process on the national level. But as is evident from above, there is no universal definition of what constitutes a national innovation system. Therefore, the discussion of the definitions of national innovation systems is largely omitted in this paper, in particular as this aspect is further elaborated in the main report related to the evaluation of the Finnish innovation system (REF). In the following the focus will be on the survey results.[1]

The respondents of the survey were not only asked to rate the current Finnish innovation system (NIS) on a grading scale from 4 to 10, but also the NIS as it was five years ago and the NIS as it is expected to be after five years. The average opinion indicates that the system is rated somewhat above satisfactory (7½). However, there are noteworthy differences between respondent groups. Especially large differences are to be found between companies and public actor respondents. While companies give only an average grade of less than satisfactory (7), the innovation and education supporting governmental organizations rate the system's performance as "good" (8). In Figure 1 the average opinions of some selected groups illustrate the development of the grading[2].

[1] Henceforth the surveys are referred to as "survey" due to the extensive overlap in the surveys – see Appendix I for more details.

[2] For more information, see Appendix II pages 37-38 and Appendix III page 81.

Figure 1 Grading the NIS - 5 years ago, today, and in 5 years



It is perceived that the development has been and will continue to be positive. The university rectors are the most optimistic respondent group when it comes to the development of the system - interestingly the department heads are more careful in their grading.

2.2. The national innovation system and its complexity

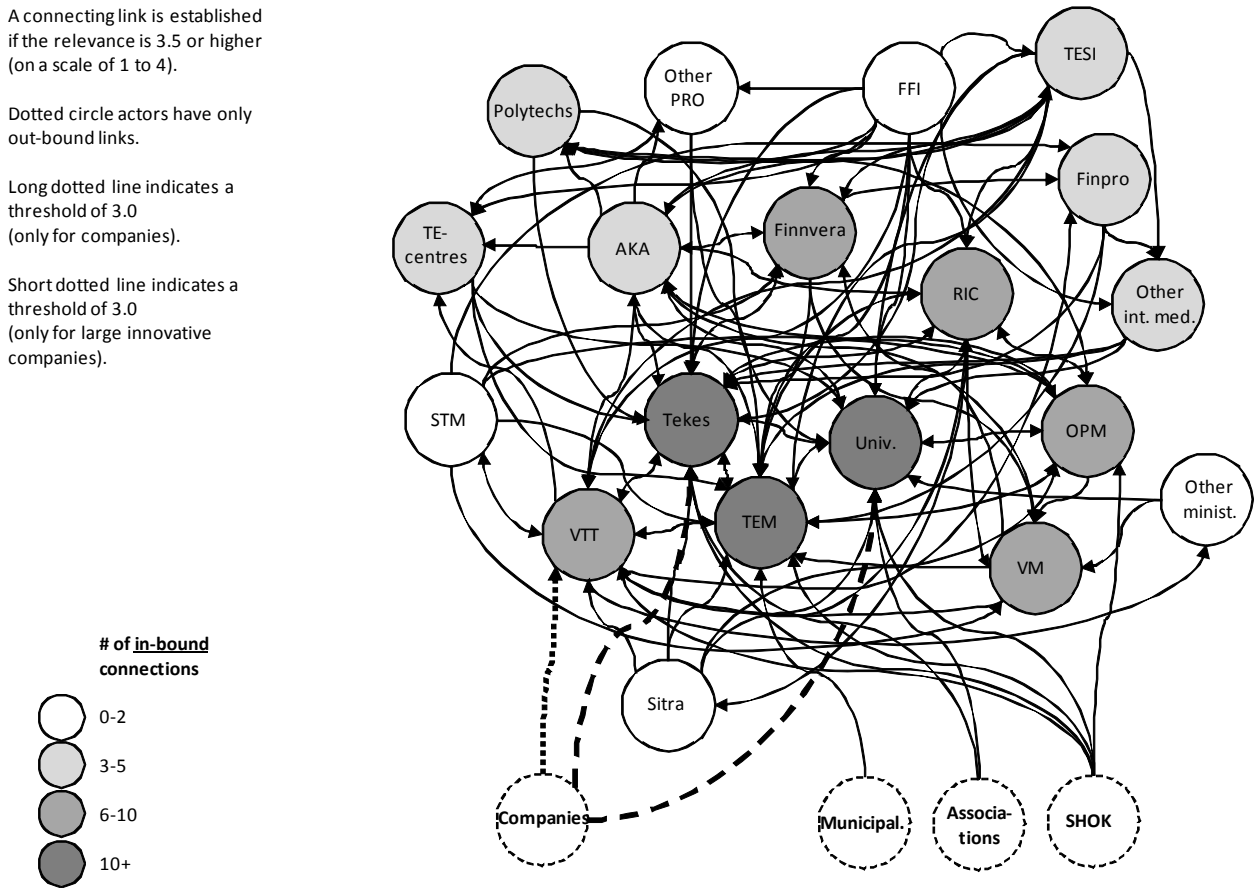
As the various definitions indicated, the NIS is a network of different actors interacting through a variety of different modes. The respondents were asked to evaluate the overall complexity of the regime constituted by the public sector actors in the Finnish NIS. On average, the system was viewed as rather complex although some variation does exist. The university rectors have a dismal view of the complexity of the system compared to their colleagues at the polytechnics and university department heads. The education supporting government organizations stand out as the only group that considers the system as rather simple.[3] This provides an interesting starting point for analyzing the interaction and importance of actors to each other.

The respondents were also asked to choose on a scale from “not at all important” (=1 point) to “very important” (=4 points) to indicate who were important actors in the Finnish NIS from their own perspective. The results are illustrated in Figure 2 where the connections rated as “very important” (more than 3.5 points) are drawn.[4]

[3] For more information, see Appendix II page 39 and Appendix III page 81.

[4] For more information, see Appendix II pages 40-41 and Appendix III pages 82-88.

Figure 2 The national innovation system as a network (based on importance)



As companies are at the core of a NIS, the survey did not allow the respondents to choose companies as important actors of the system but companies were allowed to indicate the importance of other actors for themselves. In this context the threshold of 3.5 used in the previous graphs was set down to 3 (scale 1=not at all important, 4=very important). Only two actors, Tekes and the Universities, were graded as “rather important” by both small and large innovative companies. In addition, VTT was rated as “rather important” by large innovative companies.

To highlight each actor’s position and centrality in the network, Table 2 presents a numerical index based on the in-bound and out-bound links. A high number of in-bound links indicates that others view the respective organisations as important, whereas out-bound links indicate which organisations a particular organization views as important. The ratio inbound per outbound links provides a basis for comparison between the different organisations and can be seen as a proxy of their overall importance in the NIS.

The ratio-indexes provide interesting results, but should be interpreted with care as the number of respondents considerably varies between the different actors. Results show that the top tier of the NIS is formed by the universities, the Ministry of Employment and Economy (TEM), Tekes, and somewhat surprisingly the Ministry of Finance (VM). The intermediate tier of the system consists out of the Ministry of Education (OPM), regional TE-centres, VTT, Finnvera and the Research and Innovation Council (RIC). Interestingly, Sitra has only one in-bound connection. This may suggest that the role of Sitra has in recent years been less central than in past decades.

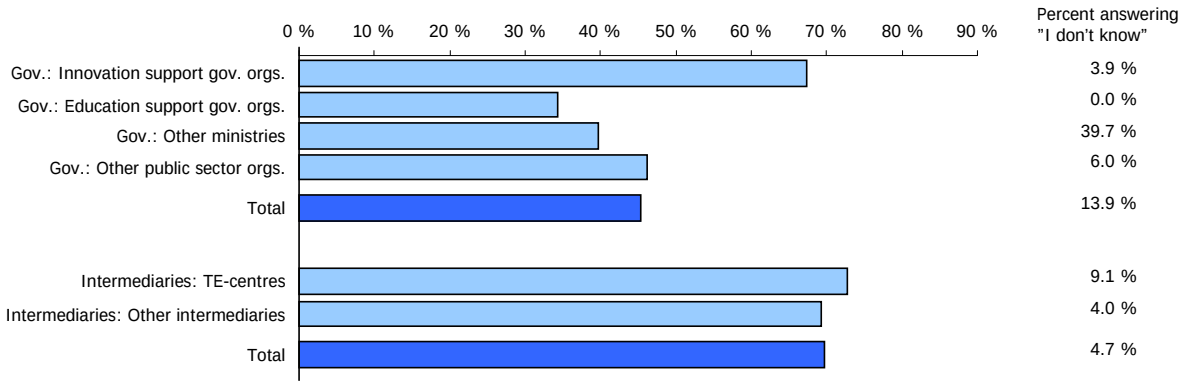
Table 2 Index of inbound and outbound links

Group	In-bound	Out-bound	Index
Academy of Finland	5	12	0.42
FFI	0	11	n.a.
Finnvera	6	5	1.20
Finpro	3	3	1.00
OPM	8	6	1.33
Other intermed.	3	3	1.00
Other min.	1	2	0.50
Other PRO	2	3	0.67
Polytechnics	3	3	1.00
Sitra	1	6	0.17
STM	1	6	0.17
TE-centres	4	3	1.33
Tekes	16	6	2.67
TEM	17	5	3.40
TESI	3	9	0.33
TIN	8	7	1.14
Universities	14	2	7.00
VM	6	3	2.00
VTT	9	7	1.29

2.3. Overlapping activities between public and private actors in innovation services

Related to the findings above there seems to be some overlap in the provision of different services among different public institutions of the NIS. Least overlap has been identified in the area of education support services.[5]

Figure 3 Overlap between different public actors (Percent answering "Yes")

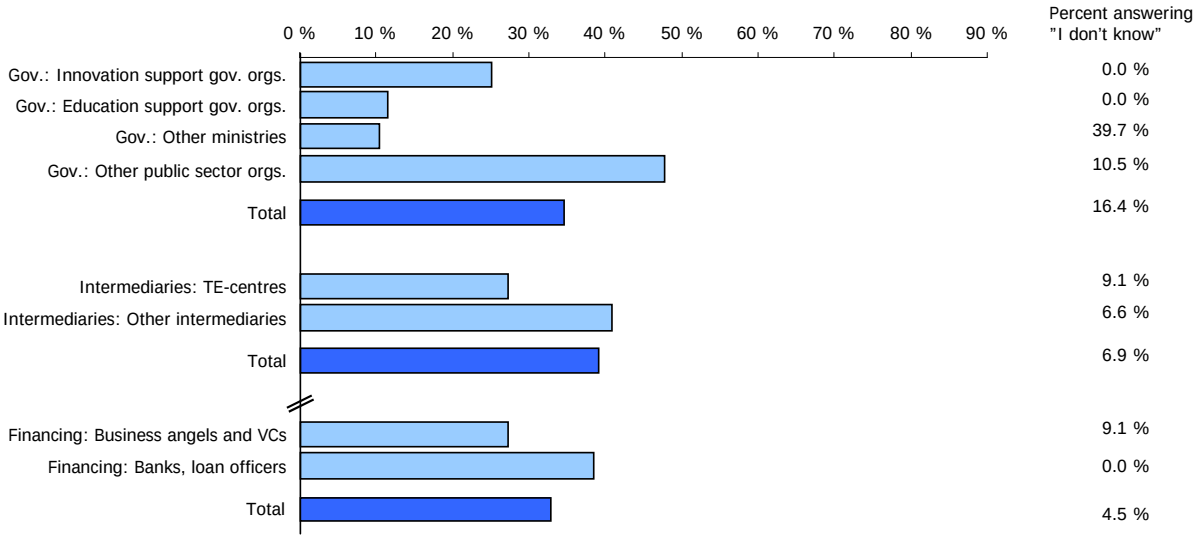


There is also a potential overlap between public and private actors. Overlap in services provided by private actors in the NIS seems to be rather small among public innovation support organizations, education support organizations and ministries (see Figure 4). Still, overlap with private sectors actors is strong among the group "other public sector organisations". The private financing sector shares this view, as one third of respondents' state that the public sector provides similar services as their organization.[6]

[5] For more information, see Appendix II page 62 and Appendix III page 100.

[6] For more information, see Appendix II page 62 and Appendix III pages 101 & 113.

Figure 4 Overlap between public and private actors (Percent answering "Yes")



When asking the public actors and intermediaries about the co-operation among service providers they view it being fairly effortless. In particular, most public service providers assess co-operation between each other to be rather effortless. TE-centres seem to have had the best experiences alongside with education support organizations and other public sector institutions trailing closely behind. Innovation support organizations and institutions belonging to the category "other intermediaries" are relatively more pessimistic[7].

2.4. Ongoing reforms in the NIS

At the moment there are four ongoing or recent reforms in the Finnish innovation system. The reforms in the educational sector include the new Universities Act and the Universities Inventions Act. There are also ongoing efforts to reform the public research organisation activities. Last reform is the formation of Strategic Centres for Science, Technology and Innovation (SHOKs) aiming to facilitate co-operation between universities and companies on a long term basis.[8]

The reform of the Universities Act governing the Finnish higher education system was originally initiated to provide universities with more financial and operational flexibility and autonomy and, thus, with better premises to fulfil their three mandates (i) to educate, (ii) to conduct academic research, and (iii) to impact societal welfare. The reformed Act extends the financial autonomy of universities by converting their current status as governmental accounting offices into juristic persons of public law that are independent of governmental control and budget. The renewed act will be enacted September 1st, 2009 and universities must show compliance with it by January 1st, 2010.

The new University Inventions Act was enacted in early January 2007. The Act provided universities with the rights of ownership to inventions made in sponsored research that, according to the principle of the professor's privilege, were considered property of the respective academic inventors prior to the change. The aim of the act was to update the incumbent legislation to better match the modern networked nature of academic research and it's financing. In particular, the allocation of IPRs between diverse parties involved in different types of research was at the centre of renewal efforts.

[7] For more information, see Appendix II page 63 and Appendix III page 101.

[8] For more information, see Appendix II pages 48-52 and Appendix III pages 92-94.

In the following, we will focus on the latter two reforms, and save a more detailed discussion of university related initiatives for later when the higher education sector is examined.

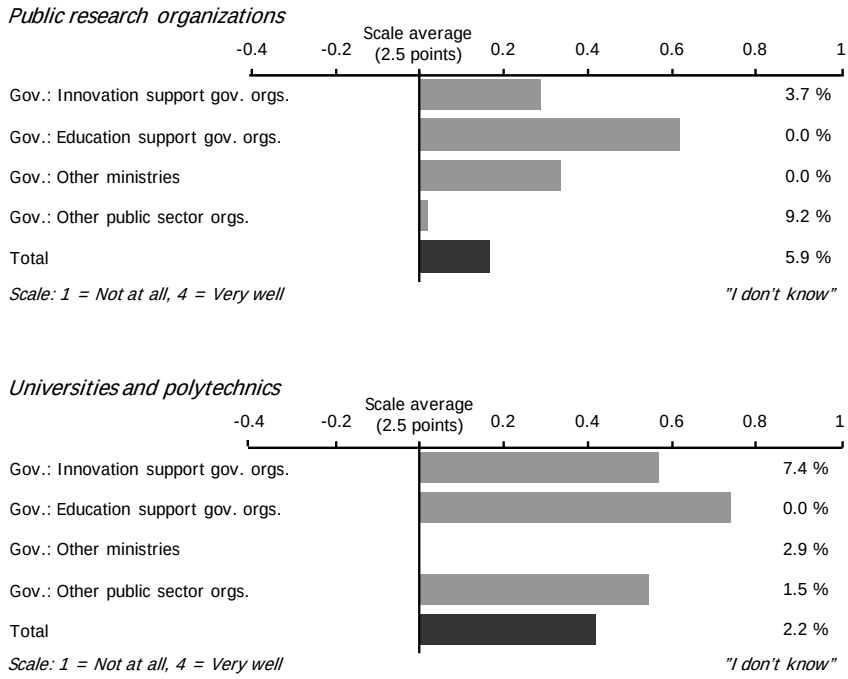
2.5. Public research organisations in need of clear-cut role demarcation

The information needs of ministries and public agencies active in and responsible for the different sectors of the Finnish economy are partially attended to by public research organisations. The so-called sector research conducted in these organisations serves the development of policies and services of the respective parent ministries. The sector research infrastructure consists of 20 separate public research organisations covering five sectors: the primary production, secondary production, health and social, environment and energy, as well as societal and cultural sectors. The public research organisations have constituted an integrated part of the Finnish national innovation system for decades.

The sector research infra-structure has been criticized for its considerable overlap with research conducted at universities, on the one hand, while other needs for information (e.g. the evaluation of potential impacts of certain policy measures) are not covered at systemically by the infrastructure, on the other hand. In particular, some of the research carried out by the current sector research infrastructure can be argued to be more fitting to the role and competence base of universities instead. Lastly, public research organisations have been argued to fail in providing information on inter-sector issues that are central in a systemic environment such as an economy. Wide-spanning reforms of the infrastructure have been on the agenda since 2005, but have so far been unable to produce significant results due to compromise-ridden solutions during the implementation of these reforms.

The survey provides evidence regarding the universities' ability to better match the needs of ministries. Figure 5 presents a breakdown of answers regarding the question how well public research organisations match the information needs of respondents as compared to universities and polytechnics. It is somewhat surprising to observe that ministries and other public sector organisations systematically assess universities and polytechnics to achieve a slightly better match than public research organisations.[9]

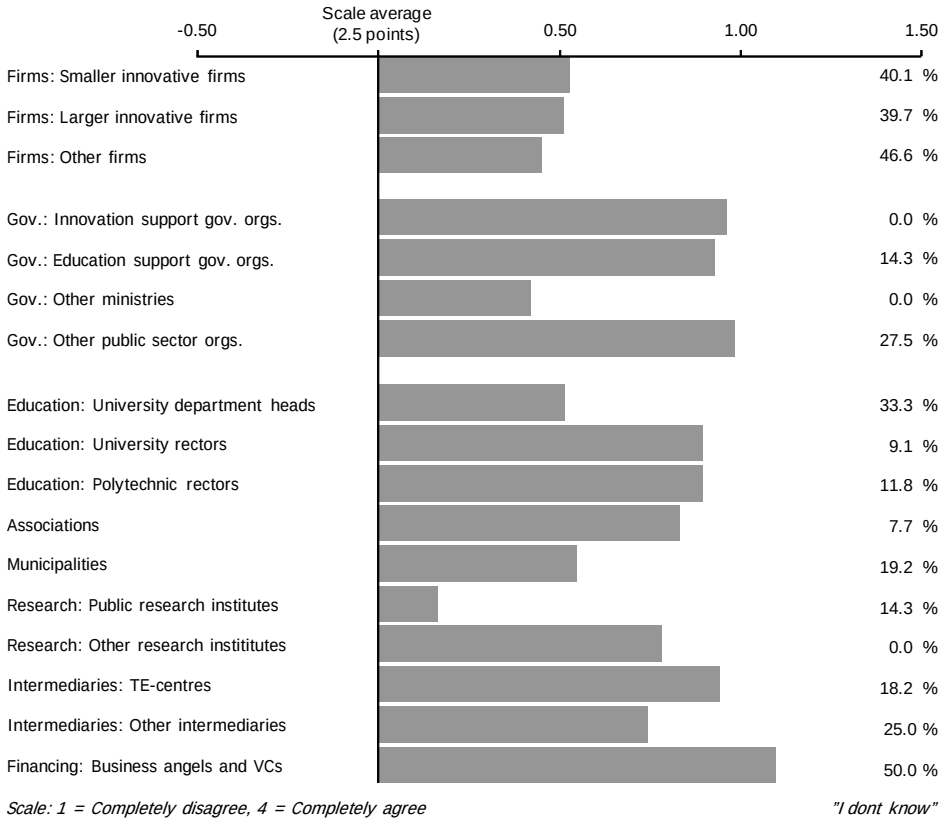
Figure 5 Match between organisations and information needs



[9] For more information, see Appendix II pages 66-67 and Appendix III page 104.

Figure 6 below shows the views of respondents according to which the state research infrastructure would benefit from a comprehensive restructuring and, thereby, affect positive impact on the performance of the national innovation system as a whole. It is particularly interesting to note that ministries as the primary principals of public research organizations seem to be among the most convinced proponents of a potential reform. Other parties especially sympathetic to the initiative include universities and risk financiers. The latter might be interested in more flexible policies regarding research spin-outs that often represent lucrative investment opportunities.[10]

Figure 6 Views to the statement that "The potential reform of public research organisations would enhance the system's performance"



2.6. SHOKs in the Finnish innovation system

The need for strategic choices in national innovation policy emerged from several government-initiated reports identifying a number of global challenges for Finland. It was concluded that the public actors of the Finnish innovation system should aim at increasing private and public investments in R&D activities. These investments have traditionally been distributed rather evenly over all innovative activity in Finland. Through Strategic Centres for Science, Technology and Innovation (SHOK is the Finnish acronym) the aim is to break with this tradition and lay more emphasis on the economic relevance of innovative activity as the decisive criterion for public funding.

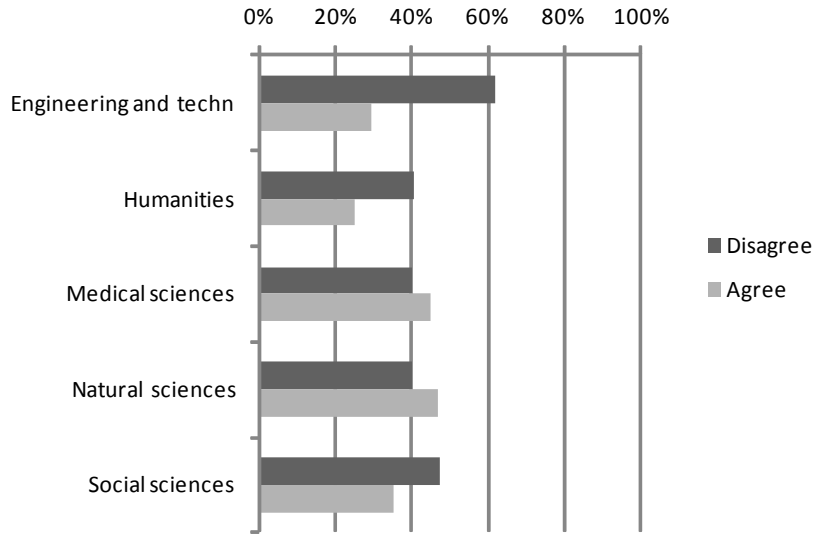
In SHOKs companies, universities, research institutes, and other partners agree on a joint strategic research agenda, a vision of the projected needs of companies regarding the development of technology five to ten years into the future. The agenda is then jointly formulated into several long-term research programs including their segmentation into individual projects. In the programs, participants develop shared know-how, shared technology and service platforms, and utilize shared research environments and tools. The research programs serve the purpose of creating a shared strategic foundation of knowledge and the basis for the development of

[10] For more information, see Appendix II page 51 and Appendix III page 94.

applications. Hence, the defining nature of research efforts and technology development in SHOK programs is mainly long-term and pre-competitive. Results arising from SHOK research programs can be applied in projects either within or outside SHOKs.

The respondents showed somewhat bipolar reactions to the introduction of SHOKs, in particular among companies and universities, two of their major stakeholders. The former express a pronouncedly optimistic view of SHOKs while the latter are much less convinced of its impact on the innovation system. While the optimism of companies is rather understandable given the unique opportunity to directly influence the long-term orientation of basic research in academia, the access to cutting-edge competence shared by participants and the streamlined procedures regarding SHOK-funding by Tekes, the less enthusiastic response of university department heads especially echoes a much more complex set of challenges related to the actual implementation of SHOKs (see also Tahvanainen 2009a and 2009b). To shed more light on the negative perception of university department heads their reactions are broken down by scientific field in Figure 7.[11]

Figure 7 Do SHOKs enhance the performance of the national innovation system? (University department heads by discipline)



The dominance of pessimistic views in engineering and other technological fields is especially striking. While over 60% of respondents active in these fields of science are not convinced of the benefits of SHOKs, only a fourth shares an optimistic view. Humanities and social sciences provide a similar but less extreme response. Only medical and natural sciences are more convinced than not of a positive impact of SHOKs. The clearly negative responses of engineering and other technical fields are most probably attributable to their predominance in SHOKs implying a higher stake in any outcomes thereof and, thus, also a higher susceptibility to the possible negative repercussions as described in Tahvanainen (2009).

For instance, Nikulainen and Tahvanainen (2009) argue that, in contrast to allocation strategies based on politically charged agendas, SHOKs enable the allocation of resources on the basis of expected economic and societal impact, corporate strategies, and the existing knowledge base. Furthermore, through intensive, institutionalized, and strongly interdisciplinary co-operation between previously isolated parties, SHOK participants are able to tap into a shared pool of knowledge, a critical mass of expertise. This leads potentially to entirely new approaches in research enabling the emergence of (i) radical innovations, (ii) an increase in the quality of research, and (iii) a further reinforcement of the strong interaction between central knowledge producers (academia) and its users (industry). Such integrated co-operation implicitly emphasizes application- and problem-driven modes of research that are more potent in spawning competitively relevant technology than is research conducted within the confines of single scientific disciplines.

[11] For more information, see Appendix II page 50 and Appendix III page 94.

3. DEMAND AND USER DRIVEN INNOVATION

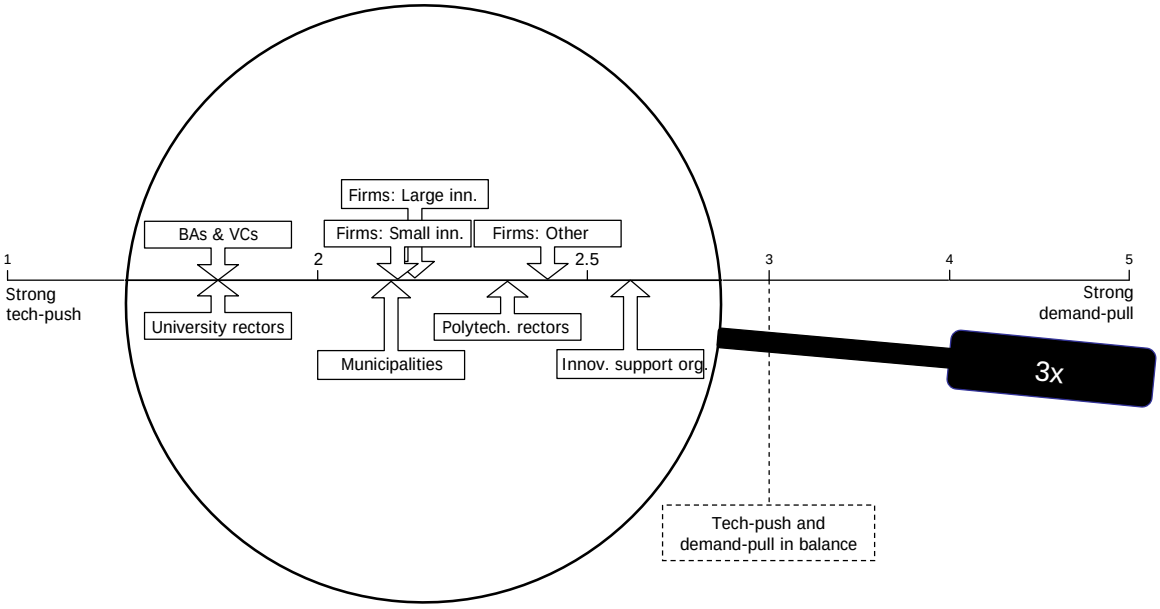
"The national supply of public expert and financing services will be updated to meet the needs of demand and user oriented innovation activity. Moreover, new operating forms and incentives will be created in support of the broad-based interaction required for genuinely demand and user-oriented innovation activity."

– National Innovation Policy (2008)

3.1. Technology-push vs. demand-pull

One of the four primary dimensions of the new innovation strategy is demand and user orientation. In the survey respondents were asked to evaluate the orientation of the current Finnish innovation policy on a five-step-scale from "strong technology push" to "strong demand pull". As illustrated in the graph below, none of the actors granted a grade above the scale average 3 and, thus, considered the national policy rather technology -driven. Companies were somewhat united in their opinions, whereas the most extreme evaluations were given by the financiers, university rectors, and governmental innovation supporting organizations (see Figure 8).[12]

Figure 8 Technology push and demand pull



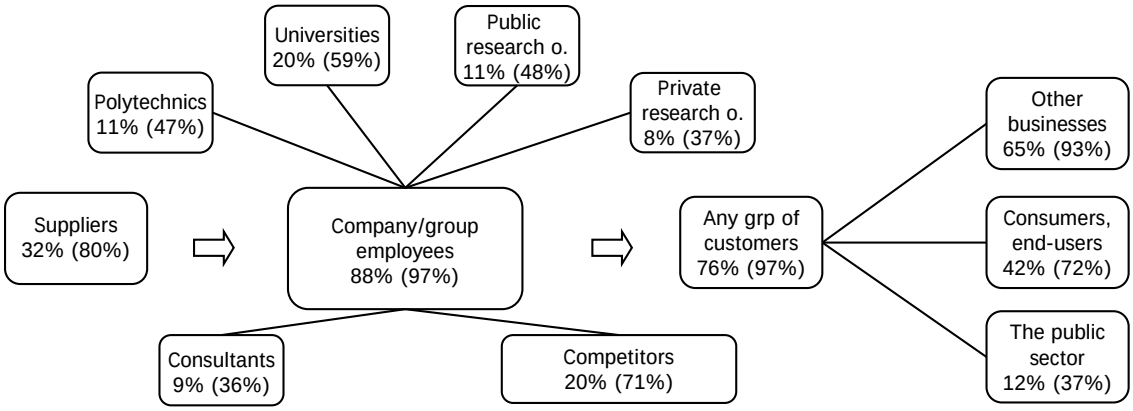
3.2. Sources of innovation

Even though the innovation system itself is considered rather technology –driven, most of the companies utilize end-users in their innovation processes. Based on the survey, roughly 60% of companies use their end-users for getting regular feedback

[12] For more information, see Appendix II page 42 and Appendix III page 89.

from their customers and one fourth of the companies involve their end-users in the actual innovation activities. These so called "lead-users" are not only providing information on their need but also actually engaging in the process of innovating. Only about 15 % of the companies do not have any significant role for their end-users in the innovation process.[13] Figure 9 adds more information on the sources of innovation by mapping the respective importance of different sources of innovation. The percentage represents the fraction of companies naming the foreign or domestic source as "very important" and the figure in parenthesis as "important" or "very important". The single most important source is company's own employees, since 88% of companies name their own employees as a "very important" source of innovation.[14]

Figure 9 Sources of innovation



While the figure above presents the importance of different sources, regardless of their origin, Table 3 shows the relation between domestic and foreign sources of innovation. Whereas domestic and foreign suppliers are considered equally important sources of innovation (multiplier of 1.0), is the importance of polytechnics almost completely due to the domestic polytechnics, since companies consider the domestic polytechnics 7.7 times more important than foreign ones. Furthermore, companies' own employees, who form the most important source of innovation, are also a strongly domestic resource.

Table 3 The relationship between the importance of domestic and foreign actors as sources of innovation[15]

	Ratio domestic/foreign	Domestic		Foreign	
	very important	very important	at least important	very important	at least important
Suppliers	1.0	22 %	(72%)	23 %	(60%)
Competitors	1.1	15 %	(62%)	13 %	(48%)
Private research organizations	1.6	5 %	(32%)	3 %	(19%)
Consultants	1.8	7 %	(33%)	4 %	(19%)
Other businesses	1.8	59 %	(89%)	33 %	(61%)
Consumers/end users	1.9	38 %	(68%)	20 %	(43%)
Any grp. of customers	1.9	72 %	(95%)	38 %	(65%)
Universities	2.5	18 %	(54%)	7 %	(27%)
Public research organizations	2.8	9 %	(43%)	3 %	(20%)
Company/group employees	3.2	86 %	(97%)	27 %	(40%)
The public sector	4.9	12 %	(35%)	2 %	(11%)
Polytechnics	7.7	11 %	(47%)	1 %	(13%)

[13] For more information, see Appendix II page 60 and Appendix III pages 98-99.

[14] For more information, see Appendix II pages 58-59 and Appendix III pages 96-98.

[15] First column presents the ratio between the fractions of companies naming the domestic and international source of innovation as "very important". A multiplier of 1 stands for equally important, and a multiplier grater than 1 means that the domestic source is x times more important than the foreign source.

3.3. Public procurement

In addition to providing a solid framework to promote demand- and user driven innovation activities, the public sector has the possibility to boost innovativeness by using innovativeness as one of their criteria in public procurement. For example, only about one fifth of the municipalities reported having an explicit strategy or agenda related to innovation activities, and only 8% of the municipalities use innovativeness as one of the central criteria in the selection of service or goods suppliers. Nevertheless, nearly three out of four municipalities are convinced that public procurement is a viable way to promote innovation.[16]

However, the public sector does turn out to participate interactively in the actual innovation process when acting as a client, fulfilling its role of end-user. Among those companies, whose main source of income is the public sector, more than 33% answer that their end users participate in the actual innovation activities. The corresponding percentage for companies serving mainly individual consumers is below 16%. More information on the link between the end users and the demand- and user-driven orientation is available in Table 4.[17]

Table 4 Sources of income and the role of end-users

Companies, whose main source of income is	consumers	public sector	private companies	I don't know
They have no significant role	4.1 %	13.9 %	19.5 %	24.4 %
They are subjects to frequent market studies (e.g. customer surveys)	57.6 %	45.4 %	33.4 %	21.6 %
They provide active and frequent updates on the changes in their needs.	49.9 %	54.9 %	49.7 %	60.6 %
They participate in the actual innovation activities	15.8 %	33.3 %	26.3 %	36.5 %

[16] For more information, see Appendix II page 76 and Appendix III page 112.

[17] For more information, see Appendix II page 60 and Appendix III page 98-99.

4. GLOBALISATION AND BUSINESS – INNOVATION IN A BORDERLESS WORLD

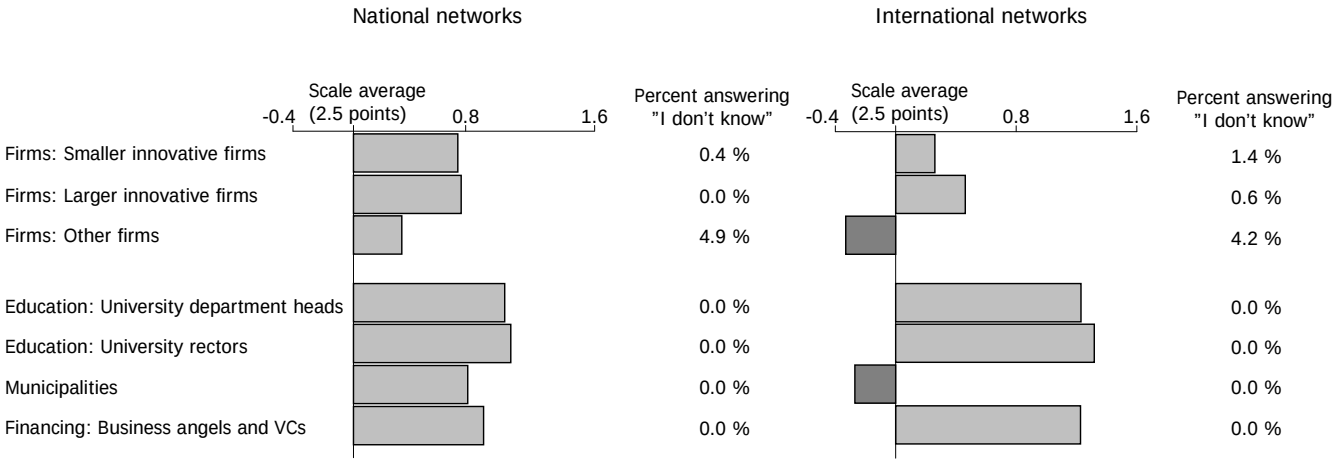
"Connecting and positioning Finland in the global knowledge and value networks requires ability to participate and influence these networks, international mobility of experts and determined development of the attractiveness of the Finnish innovation environment."

– National Innovation Policy (2008)

Examining the fraction of exporting and importing companies among the survey respondents helps to grasp aspects of internationalization in the sample. Nearly half of the respondent companies engage either in export or import activities or both with 15% of the companies being solely importers, 6% exporters, and 26% importers and exporters. The residual of 53 % only sells and buys products and/or services on Finnish markets. However, looking at these figures from the innovation perspective does change results slightly. It is notable that innovative companies are in general more international than non-innovative companies. Among those firms having had innovation activities during the last three years more than 7% are exporters, whereas the corresponding fraction among the non-innovative companies is around 4%. A similar trend is observed when looking at the fraction of companies having foreign subsidiaries. 14% of the innovative companies maintain subsidiaries abroad while only 9% of non-innovative companies have subsidiaries located outside Finland.

The fact that innovative companies are more internationally oriented than non-innovative companies is also supported by the results presented in Figure 10. It is noteworthy to mention that the respondent group "other firms" deem international networks even less important than municipalities. The respondent groups considering international networks even more important than national networks include universities as well as business angels and venture capitalists.[18]

Figure 10 How important are national/international networks for your organization? (1=not at all important, 4=very important)



[18] For more information, see Appendix II page 47 and Appendix III page 92.

5. GROWTH ENTREPRENEURSHIP AND FINANCE

"By means of taxation, experienced capital investors and business experts will be motivated to commit themselves to the development of enterprises aiming at rapid growth and internationalisation. … Company taxation and insolvency legislation will be developed so as to encourage small innovative businesses to generate growth and take risks, and to create prospects for serial entrepreneurship."

– National Innovation Policy (2008)

Improving the Finnish environment to support growth companies is a major development guideline in the innovation strategy of the Finnish government. Measuring the success of the Finnish innovation policy by the number of high growth companies is said to return low marks. One way to stimulate the emergence of new growth companies could be the use of tax incentives. Although many of the new growth companies do not make any profits for several years to come, a tax incentive regarding their future earnings and profit sharing could set a strong incentive for entrepreneurs and financiers to engage in the project and could therefore be part of the innovation strategy of the Finnish government. The surveys asked both companies and financiers if a tax incentive could be an efficient measure in raising the number of growth companies in Finland (Figure 11).[19]

Figure 11 Role of tax incentives in increasing the number of growth firms

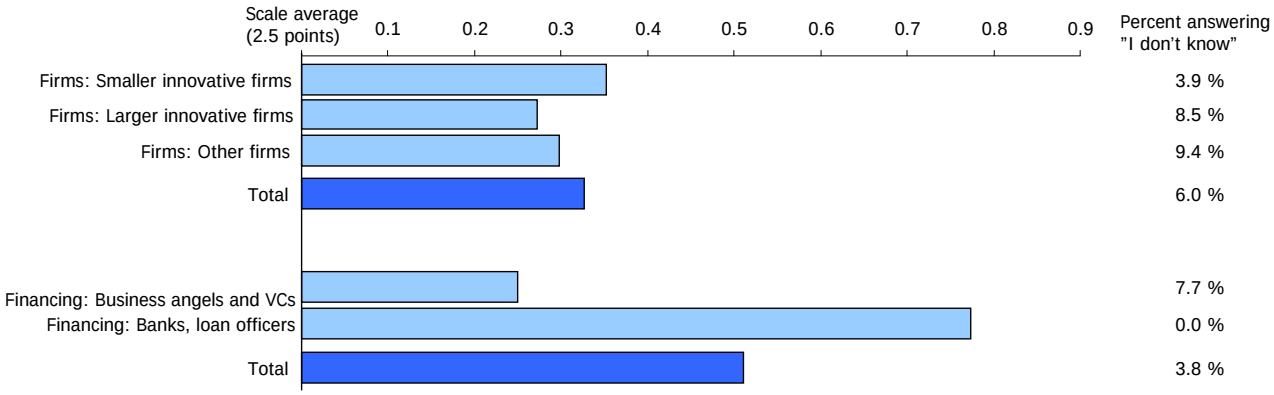


Figure 11 shows that the majority of firms and financiers perceive tax incentives to be an efficient way to boost the number of growth firms with financiers being clearly more optimistic than companies. Among firms, small innovative companies were most optimistic but still far behind the banks' loan officers whom see the tax incentives as a "very efficient" way of increasing the number of growth companies. One has to note that banks do rarely engage in projects that are as risky as the start-ups of (innovative) growth firms and therefore it is not surprising that they are very positive about the complementary role the government can play by introducing a tax incentive. The answers of business angels and VC's, stakeholders that do usually finance risky start-ups, are in line with the answers of the innovative companies. It should be stressed that survey results of the financiers have to be interpreted with care as the absolute number of respondents was fairly limited. The optimism of the respondents may be related to the fact that companies tend to appreciate tax incentives.

[19] For more information, see Appendix II page 57 and Appendix III page 96.

Figure 12 Ranking of policy measures that were found to be important for the operations (share of small innovative companies)

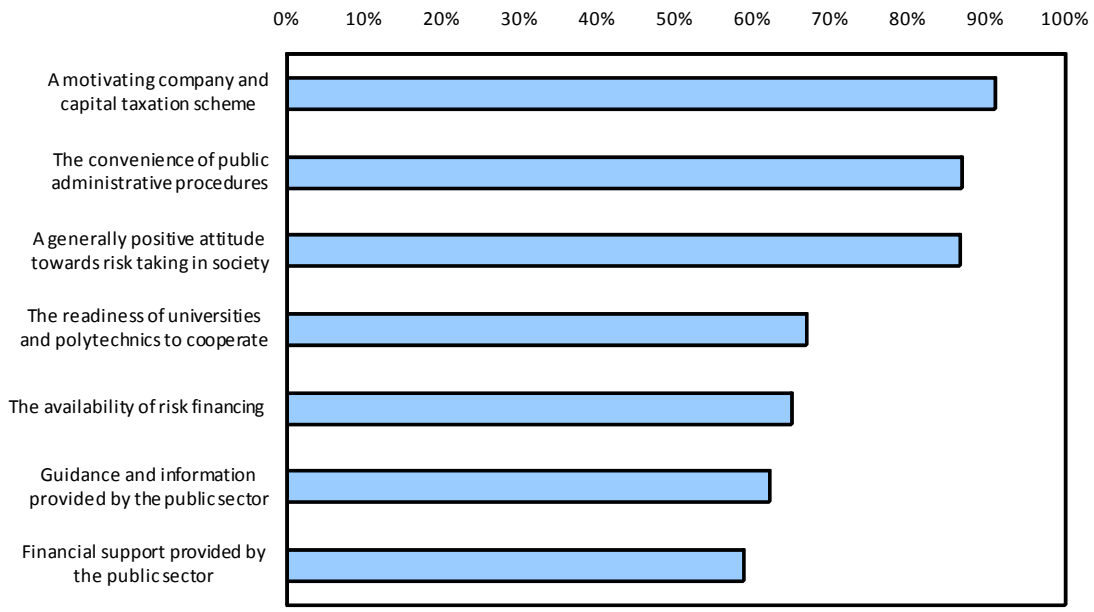


Figure 12 focuses on smaller innovative companies identifying aspects of public policy being perceived as important for their operations. The innovation system survey revealed that taxation issues do seem to matter the most. Lowering taxes can be an important measure to release substantial financial means in companies for purposes of developing the business. So, it is not surprising that a motivating tax scheme regarding both corporate profits and capital gains and promoting entrepreneurship is in great demand. Indeed, in company surveys most firms ask for lower taxes as this general policy measure applies to the whole company population contrary to other measures that target a subset of the company population. Overall, business representatives prefer broad tax measures whereas governments tend to prefer targeted subsidies with a limited impact on their budget. Other aspects of public policy that are marked as important by a high share of companies (as they are still more general) are a well functioning public administration and a generally positive attitude towards risk taking. In addition companies, especially the innovative ones, seem to support measures that improve the view towards risk taking in society.[20]

The role of financing does vary over business cycles and is expected to play a particularly crucial role in times of economic distress. In the following some survey results dealing with the impact of the ongoing financial crisis are discussed.

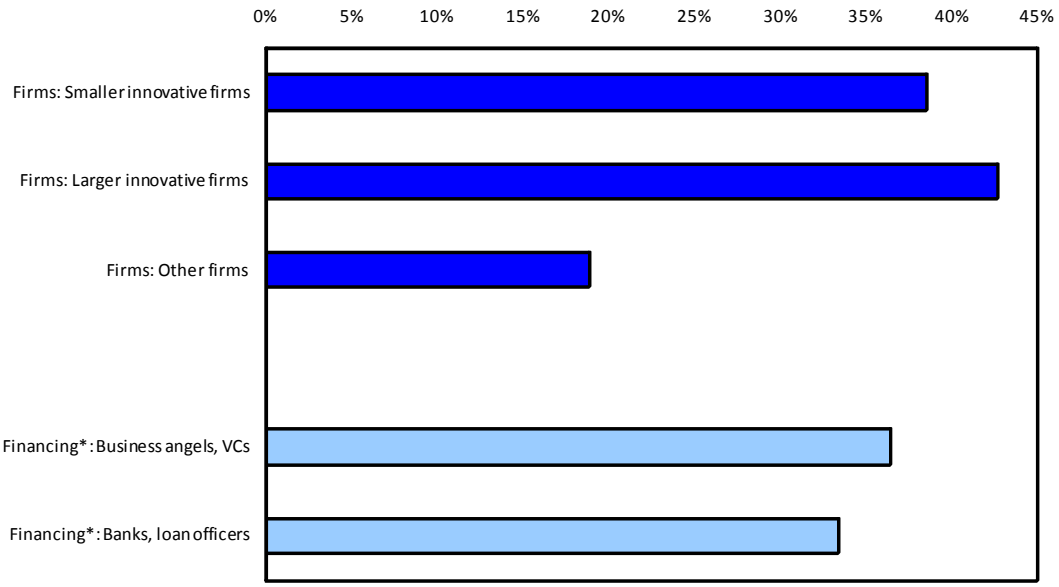
5.1. Financing of companies in times of financial instability and economic distress

Based on the survey data, it is possible to measure the impact of the ongoing global financial crisis on the investments of Finnish companies. Results show that the financial instability negatively affected the investments of roughly one third of the company population. For innovative companies the share is twice as large as that of non-innovative firms (Figure 13). Larger innovative companies seem to be affected even more than their smaller counterparts. Roughly one third of the financiers had a client base of which at least half of their clients had to cancel investments due to the financial crises. The share is slightly higher for business angels and VC's than for banks, not really surprising.[21]

[20] For more information, see Appendix II page 55 and Appendix III page 95-96.

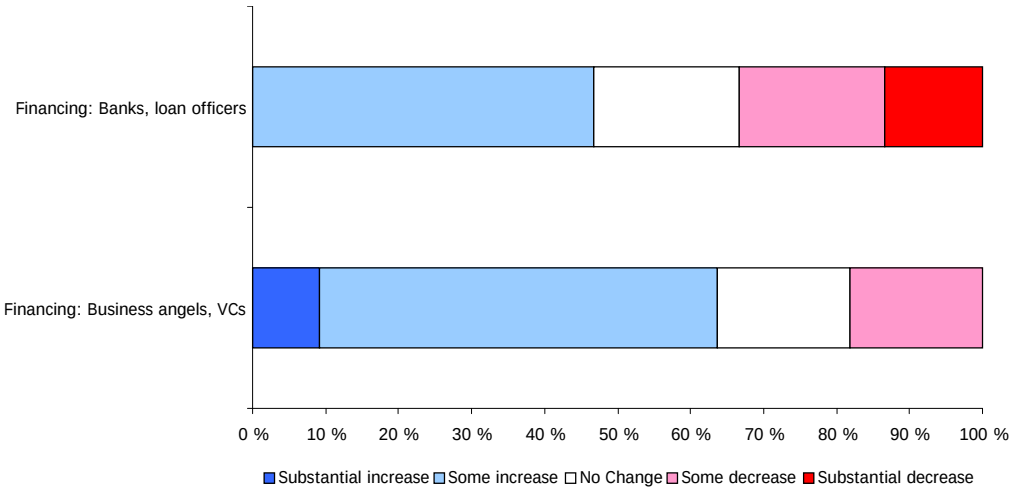
[21] For more information, see Appendix II page 60 and Appendix III page 99.

Figure 13 Share of companies that had to postpone or cancel projects due to the financial crisis and share of financiers with at least half of their company clients having to postpone or cancel projects due to the financial crisis



The uncertainty brought by the financial crisis curbed a significant share of the company investments and may therefore have weakened the demand for (long-term) financing. On the other hand, certain factors may have increased the demand for financing. Indeed, due to liquidity problems the demand for (short-term) financing may have gone up significantly. Figure 14 shows mixed results but may signal that aggregate demand for external financing may have slightly gone up. More than half of the financiers experienced an increase in the amount of incoming funding applications. However, one third of the banking officers also reported a drop in the number of applications.[22]

Figure 14 The changes in the demand of external finance



According to the financiers the quality of a substantial share of funding applications deteriorated. Almost two thirds of the banks responded that the quality of their applications dropped, while VC's reported this share to constitute roughly one third of received applications. Only 10% to 20% of the financiers reported an improvement in the quality of applications.[23]

[22] For more information, see Appendix II page 79 and Appendix III page 113.

[23] For more information, see Appendix II page 80 and Appendix III page 113.

Financiers tightened their funding criteria as a response to the higher economic uncertainty and the elevated risk of company failures. A second factor that may have contributed to the tightening is the financial instability of the banking sector itself. As the capital base of many banks has shrunk rapidly have financial institutions become even more risk averse. More than 80% of bank officers report to have tightened their criteria for obtaining corporate credit. For business angels and VC's that share is 4 times smaller (20%) as the criteria of risk financiers are usually more stringent than those of banks.[24]

6. REGIONAL INNOVATION POLICY

"The specialisation of regions in their strengths will increase their critical mass of expertise and improve their ability to link with expertise and value networks vital to their own development. Furthermore, regionally decentralised research, development and innovation activity will become a national resource when pooled into networked innovation communities. A country of Finland's size can only host a few diversified, internationally competitive centres of innovation."

– National Innovation Policy (2008)

The Finnish NIS is well-established on the grass-root level with several hundreds of local actors working across the country. For this survey alone, 189 questionnaires were sent out to local intermediaries who, according to the survey data, allocate on average 50% of their man-power to innovation activities and/or innovation support functions. The intermediaries include for example science parks, technology centres, and local development centres. Among the publicly funded TE-centres the corresponding share of man-power allocated to innovation support is 20%. In addition to the local intermediaries also municipalities were contacted. About 86 % of the 80 municipalities answering to the survey had dedicated at least some of their proprietary funds to supporting and/or stimulating local innovation activities. The most common form of support was financing, which was provided by almost all of the respondents. 70% of the municipalities provided facilities, and more than one half offered information services related to innovation activities.[25]

The aim of the national innovation policy is to promote innovation activities on a national level rather than to be an explicit extension of regional policy. Both policies should be compatible, however. In the survey, the respondents were asked to evaluate, whether the national innovation policy also promotes the agendas of regional policy. According to the results of the survey, the Finnish NIS does seem to have a strong regional agenda, since the clear majority of respondents believe the national innovation system to promote the agendas of regional policy. More than 90 % of the governmental education support organizations agree with this view. The respondent groups disagreeing most strongly with the claim are the governmental innovation support organizations, municipalities, and TE-centres.[26]

While the national innovation policy is regarded as implementing regional agendas as well, the respondents simultaneously claim it to be unequally efficient in different regions of Finland. In particular, the local actors, such as municipalities and all intermediaries, consider that there are regional biases in the policy across the country. The percentages of respondents agreeing and disagreeing with the statements of the regional dimensions of the innovation policy are presented in Figure 15.[27]

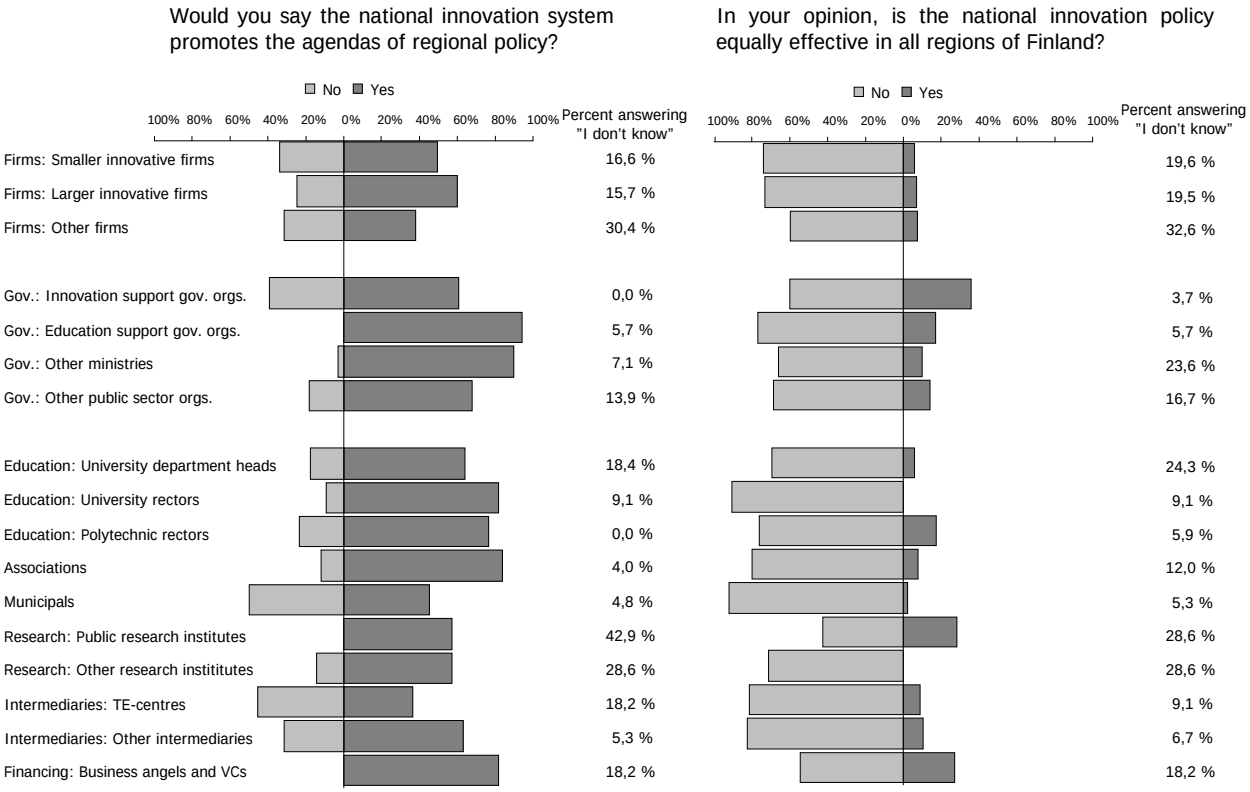
[24] For more information, see Appendix II page 80 and Appendix III page 113.

[25] For more information, see Appendix II page 75 and Appendix III page 112.

[26] For more information, see Appendix II page 45 and Appendix III page 91.

[27] For more information, see Appendix II page 46 and Appendix III page 91.

Figure 15 The regional dimension of the national innovation policy



7. EDUCATION, RESEARCH AND ECONOMY

"Finnish educational system will be developed so as to strengthen the general level of competence and support the development of special talents. Internationality, interactive skills, entrepreneurship, creativity and innovation will be introduced at the core of teaching. An internationally top-level development environment for learning will be created in Finland."

– National Innovation Policy (2008)

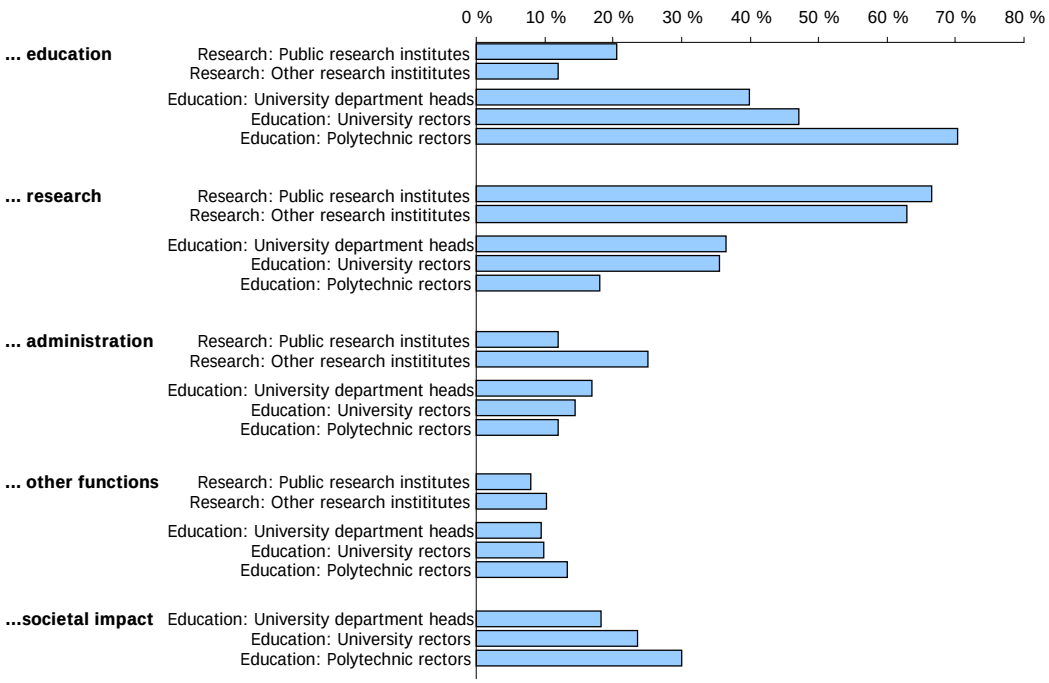
The survey also addressed the current state of the national infrastructure related to education and research. In particular, this section highlights some preliminary findings on the reform of the Finnish Universities Act. Before that, however, some general empirics on cooperation patterns and the allocation of labour across tasks at universities, polytechnics and public research organisations are discussed.

7.1. Allocation of labour across tasks

To start with, Figure 16 is a breakdown of the allocation of labour to different tasks by respondent category.[28]

[28] For more information, see Appendix II page 71 and Appendix III pages 107-108.

Figure 16 How large is the share of your organisation's labour input that has been allocated to...



The allocation of labour input across respondent categories seems to coincide by and large with the task profiles strategically allocated to the different actors of the educational system. Universities balance between their educational and research responsibilities with education being slightly more dominant (~45% vs. ~35%). The recently added third task, affecting societal impact, is allocated roughly 25% of labour input. As expected, polytechnics focus more on education, while research institutes have a strong emphasis on research. Once again, the overlap in research conducted at universities and state research institutes is one of the challenges of the national innovation system being currently debated in the political foreground.

To provide more depth to the data on the allocation of resources across tasks, respondents were further asked to indicate whether universities, polytechnics and public research organisations performed well in four pivotal tasks: (i) conducting international, cutting edge research, (ii) conducting research matching national needs, (iii) educating experts for international business activities, and (iv) educating experts for domestic and local business activities. International level research was clearly assessed to be the forte of universities (93% of respondents agreed). Similarly, the education of people for the purposes of international business activities belonged to the identified strongholds of universities (86%). Polytechnics were considered to perform well in providing competencies for the needs of local businesses and the economy (86%), while the production of international business competencies and research in general received much weaker grades. Finally, public research organisations were assessed to do rather well in the area of national level research (64%) but failed to truly excel in any of the tasks in comparison to universities and polytechnics.[29]

7.2. Patterns of cooperation

Respondents from universities and polytechnics also assessed the importance of a variety of actors as partners in joint research projects. The emerging patterns give some initial indication on the complementarities regarding knowledge and substance of research among the involved parties within NIS. Further, it provides evidence of the interconnectedness of actors prerequisite for formal and informal modes of technology transfer within the system.

[29] For more information, see Appendix II page 43 and Appendix III pages 89-90.

Figure 17 How significant was the role of the following actors in cooperative projects of your department in the last three years? (1=None, 4=Very large)

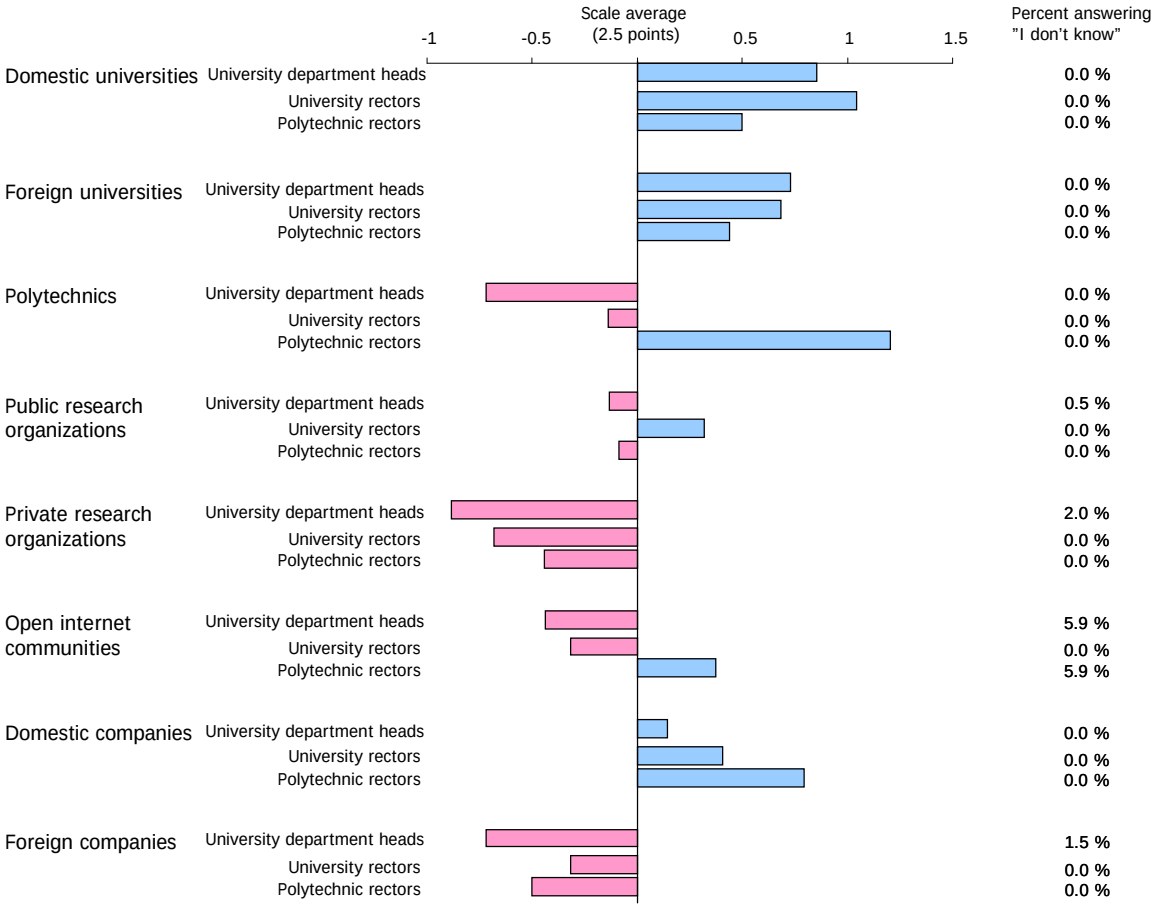


Figure 17 reveals that collaboration beyond the boundaries of the respondents' own institutional contexts seems rather scarce. Universities tend to collaborate almost exclusively with other universities, domestic and foreign, while polytechnics are somewhat more active in cooperating also with companies.[30]

Since cooperation between companies and academic institutions has received much attention in Finnish innovation policy, Figure 18 sheds more light on the motivations of universities and polytechnics to engage in cooperation with corporate entities. Respondents provided yes/no –answers indicating the objectives of joint research projects with companies. The sheer opportunity to participate in publicly funded research programs, i.e. the opportunity to access external funding, is clearly the primary motivation to enter joint projects for universities. With the dawn of the reform of the Universities Act this motivation will probably gain further importance as universities will become financially independent of the state and will have more incentives to compete for external funding. Access to complementary expertise and competent personnel was also deemed important. The nature of joint projects seemed to be slightly more oriented towards solving given problems than towards a more academic exploration for new ideas.[31]

How does the reform of the University Inventions Act affect the opportunities to collaborate then? The Act came into being after a lengthy preparation process initiated by the Ministry of Employment and the Economy. Its objective was to create a harmonized IPR-environment that would streamline IPR-related policies in modern day research projects with participants from very different types of institutions. One major change was to award universities with ownership rights to IP emerging from government funded research.

[30] For more information, see Appendix II page 72 and Appendix III page 109.

[31] For more information, see Appendix II page 73 and Appendix III pages 109-110.

Figure 18 Have joint projects with companies addressed the following research objectives of your department?

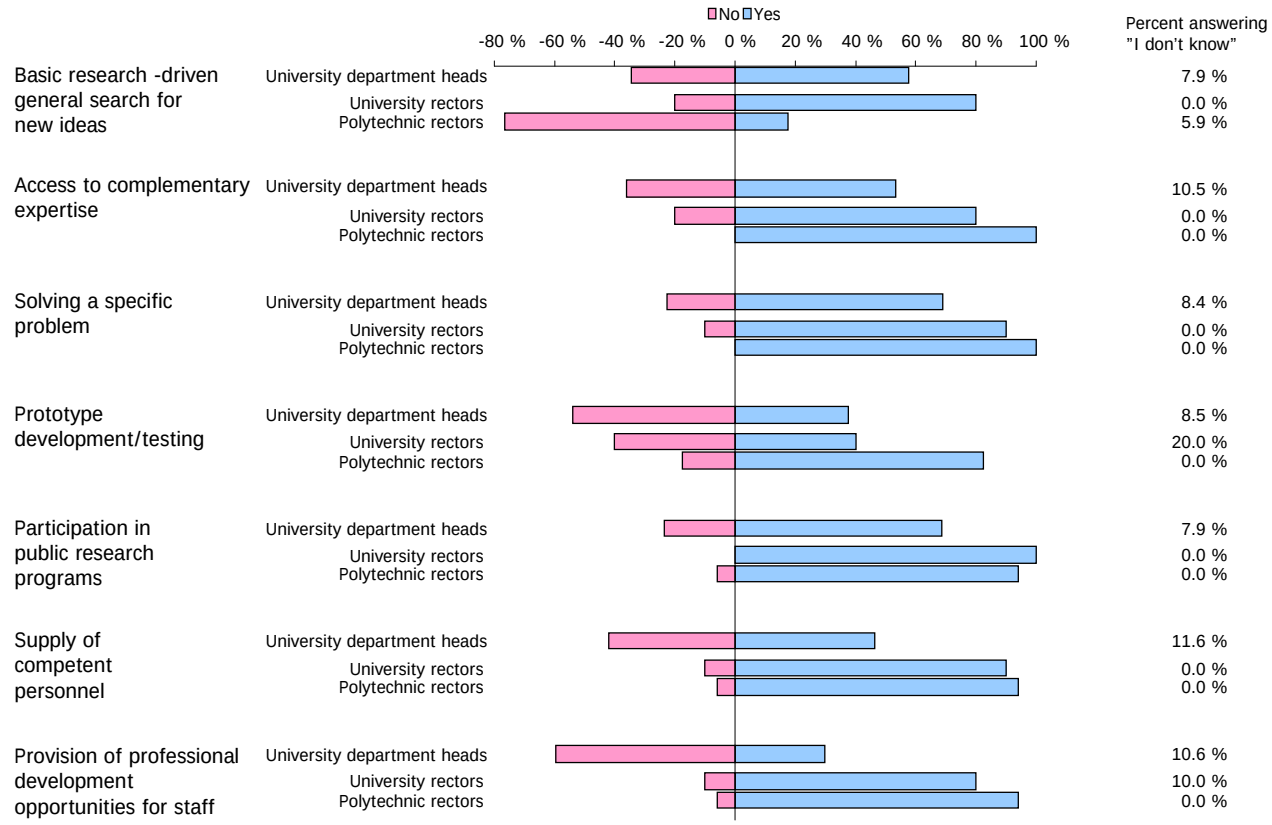


Figure 19 The reform of the University Inventions Act will enhance the co-operation between companies, universities and polytechnics (1=disagree, 4=agree)

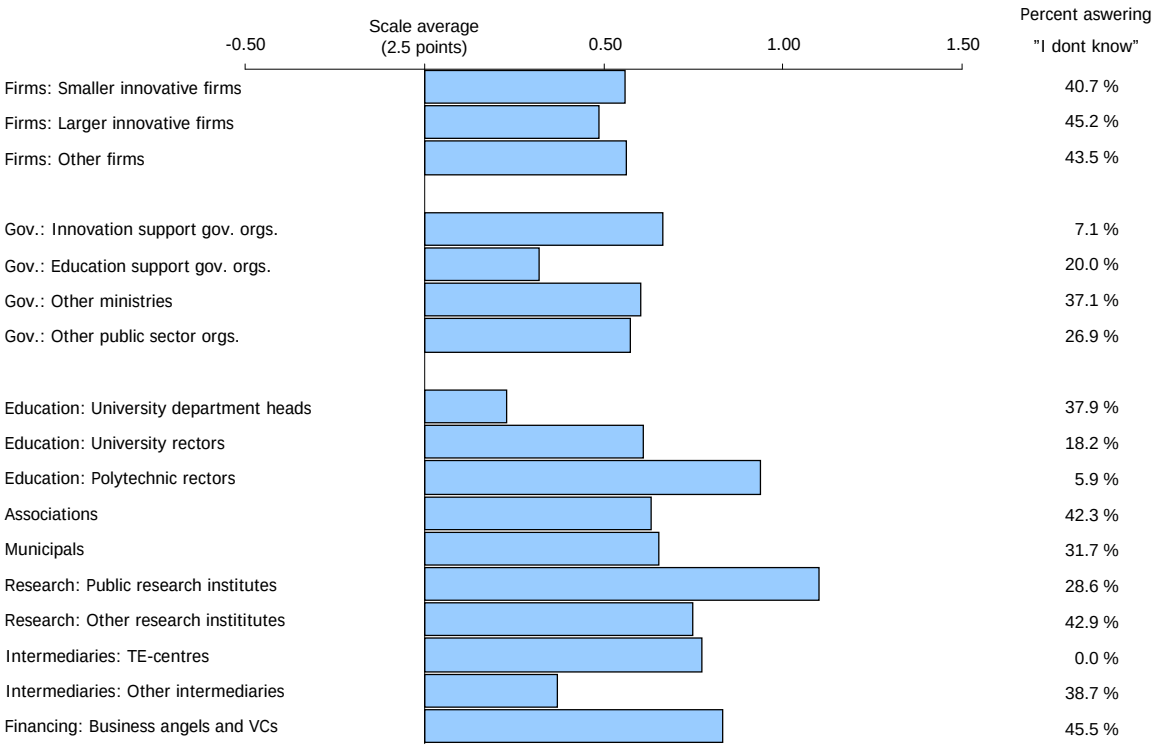


Figure 19 provides a breakdown of respondents' expectations on whether the reform will have a positive effect on cooperation. On average, none of the respondent groups provided a negative estimate. The most optimistic respondents included polytechnics and public research organisations. Among the less optimistic ones were education support organisations, university department heads and companies. It has to be noted that, on average, even these actors seemed to agree with positive expectations at least to some extent. The less optimistic stance of education support organizations is somewhat surprising as they took on an active role in preparing the Act.[32] For more details on the Act and its expected effects on university research see Tahvanainen (2009a and 2009b).

7.3. Reform of the Universities Act

The Finnish education system is currently undergoing major changes of which the most significant one is the ongoing renewal of the Universities Act governing the Finnish higher education system in its entirety. It was originally initiated to provide universities with more financial and operational flexibility and autonomy and, thus, with better premises to fulfil their three mandates (i) to educate, (ii) to conduct academic research, and (iii) to impact societal welfare. The transfer of university technology to societal use is considered one focal means to contribute to the latter mission.

The most central of changes is the conversion of universities from being governmental institutions into independent juristic persons of public law. Despite their independence, however, universities will continue to uphold the governmental responsibility to fulfil their public mission as mandated in the educational and research policies. The administration of universities will be reformed in a way that enables them to operate better and more independently in their new economic position. The election of university board members will still be handled internally but the share of external members will increase to at least 50 percent, including the chairman. The task of external board members is to set down strategic university policies, to allocate resources, and to develop universities as organizations. Internal decision making power of the university community will be increased in issues of education and research with the objective to promote autonomy and self-direction.

Another major reform will be the conversion of the university employees' status from civil servant to contract based employee. At the same time the rights to negotiate the terms of employment contracts is transferred to the universities. These reforms are expected to provide universities with more flexible tools for designing better incentive systems and for practicing better human resource policy.

In contrast, the degrees granted by universities and the educational responsibilities related to them will still be governed by decree of the Council of State. In parallel, the allocation of educational responsibilities among different universities will be governed by decree of the Ministry of Education. This is to ensure that the system provides an appropriate amount of higher education and that it does not exhibit too much internal overlap.

After the reform, universities as independent juristic persons will be excluded from the governmental budget system. This does not imply, however, that they will not continue to receive governmental funding anymore as universities will annually be assigned funding by way of governmental budgeting for carrying out the tasks allotted to them in the Universities Act. What truly extends the set of funding tools universities could tap into are the more flexible possibilities to retain profits from universities' own business activities, donations, capital income, contract education, and tuition from students originating from outside the European Economic Area.

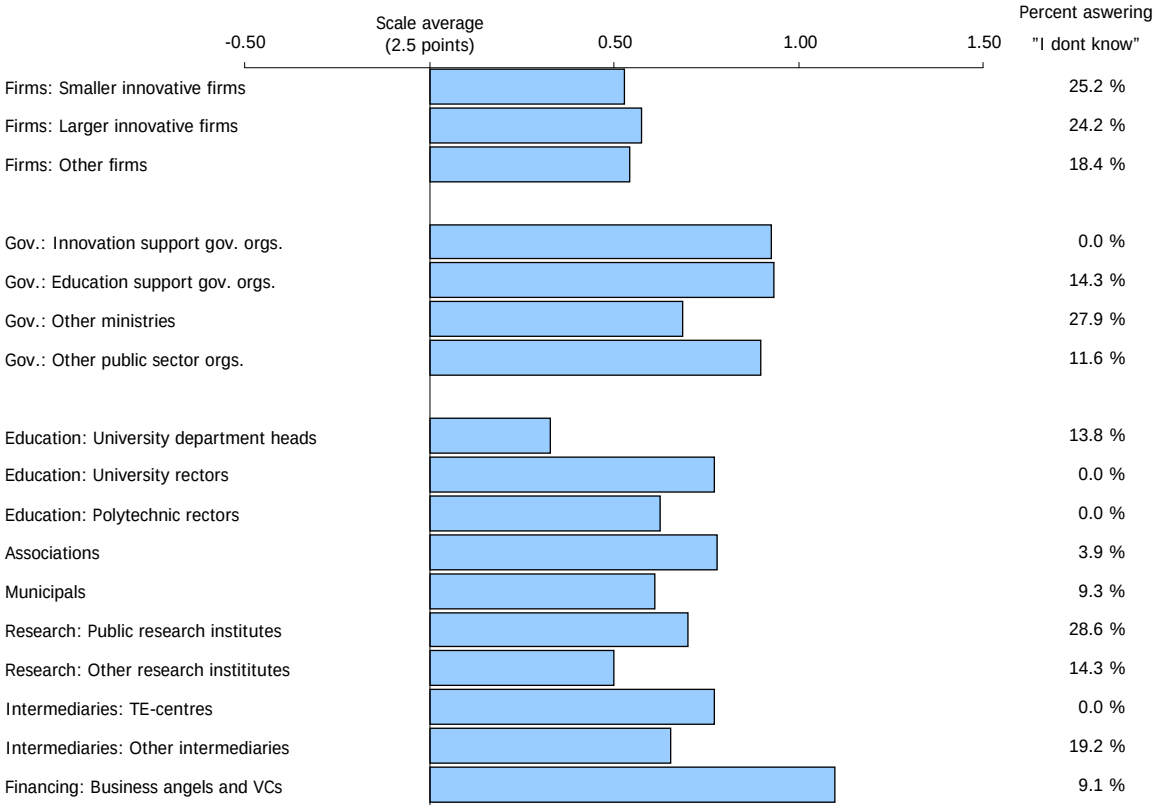
The autonomy will motivate universities to set strategic targets by focusing resources on their respective strategic areas of research, for example. This, in turn, will help universities to profile and position them within the national innovation system.

[32] For more information, see Appendix II page 52 and Appendix III page 94.

This will also have direct positive effects on the development of regions around universities through industry cooperation and the emergence of new companies. Especially the supply of contract research and consulting services should be easier under the reformed regime. Furthermore, the reform should enable universities to enhance their interactive capabilities with their surrounding environments and to adapt more swiftly to changes. This flexibility is expected to have a positive effect on innovation and the labour demand driven supply of education in general.

The following four figures show how survey respondents anticipate the reform to affect the innovation system with regard to some of its most central agendas discussed above. The figures present the average responses of each respondent category as a deviation from the scale average (2.5).

Figure 20 Will the reform of the Universities Act promote INTERNATIONALIZATION?



Overall, respondents assessed the reform's impact on the internationalization of the innovation system as rather positive. Internationalization has often been argued to be central to strengthening and improving innovation capabilities and the quality of research. Most enthusiastic proponents included ministries, university management, associations, intermediaries and risk financiers. Companies, university department heads, and private research institutes were only slightly less optimistic about the impact. The differences in attitude might reflect the fact that the latter respondents will be more directly affected by the changes required by the reform and, thus, weigh possible opportunities and threats more carefully.[33]

The reform's expected impact on the quality of teaching received fairly similar appraisals. To be more precise, respondents were only slightly less optimistic regarding the impact on teaching than that on internationalization. The expectations of university department heads, in particular, were rather pessimistic.[34]

[33] For more information, see Appendix II pages 48-49 and Appendix III pages 92-93.

[34] For more information, see Appendix II pages 48-49 and Appendix III pages 92-93.

Figure 21 Will the reform of the Universities Act promote the QUALITY OF TEACHING?

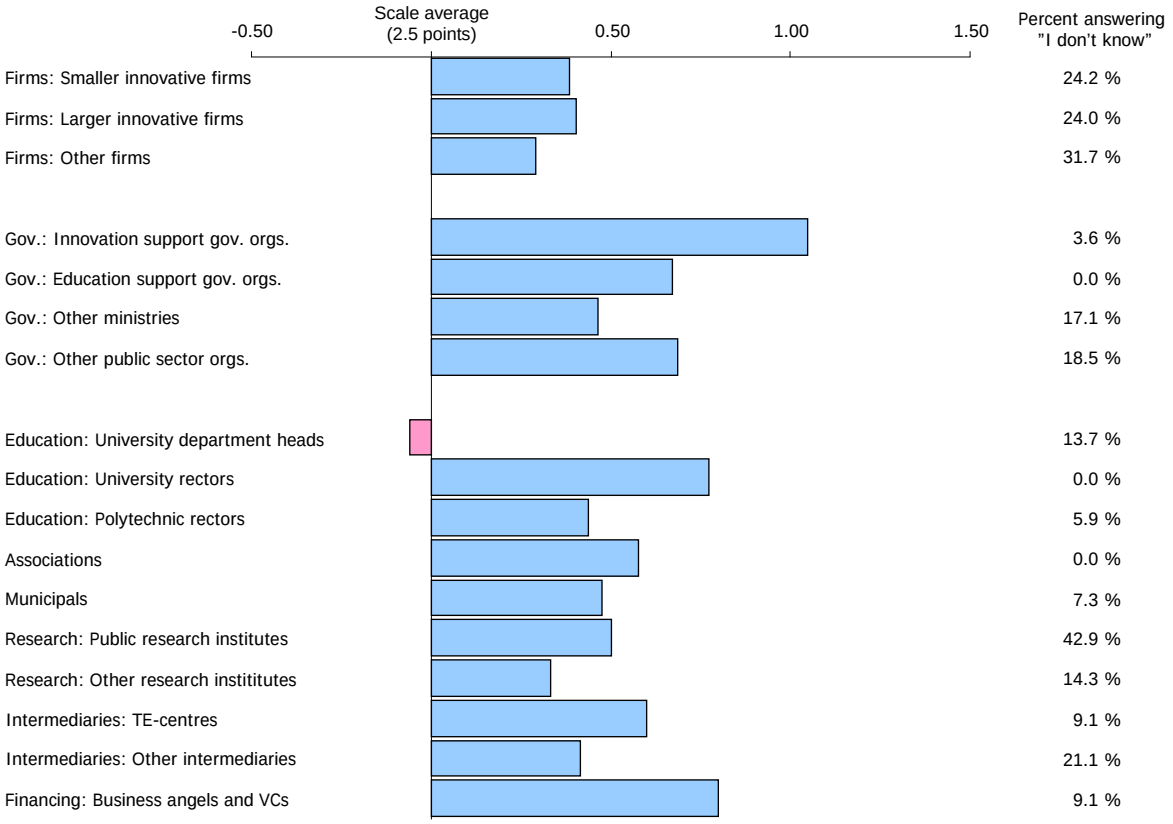
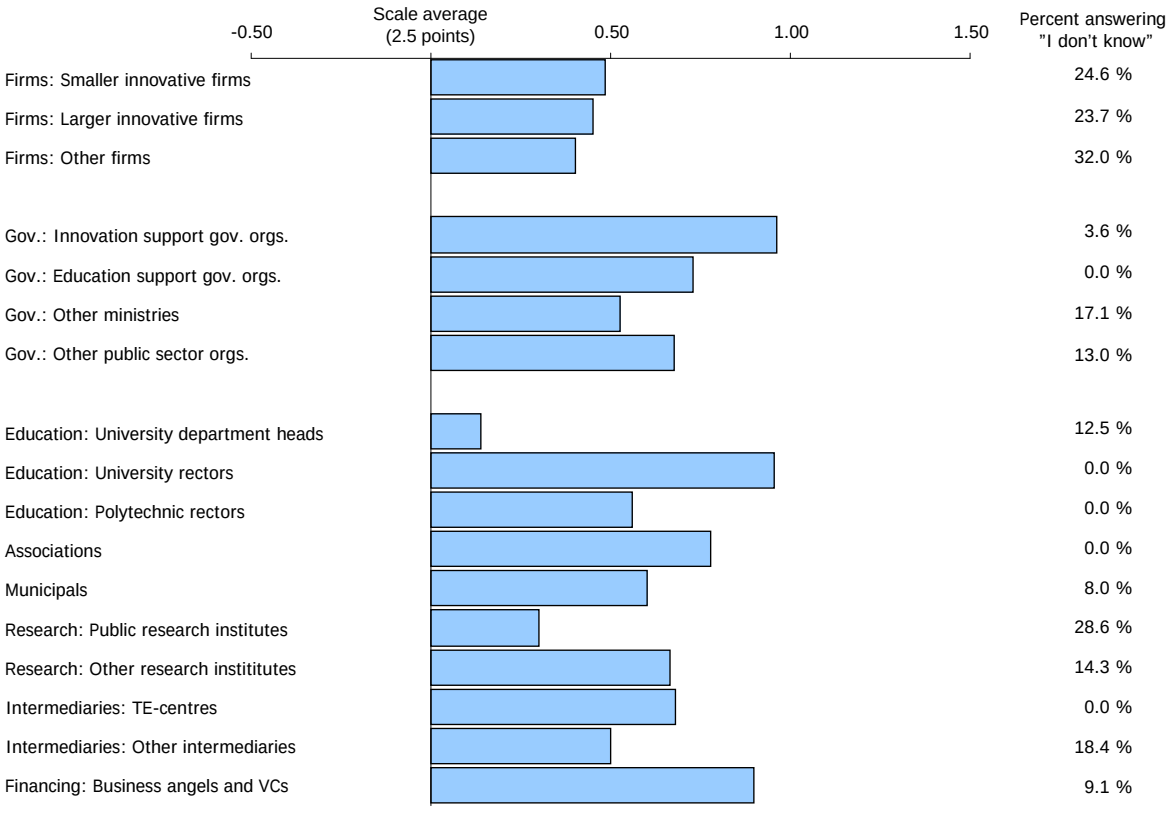
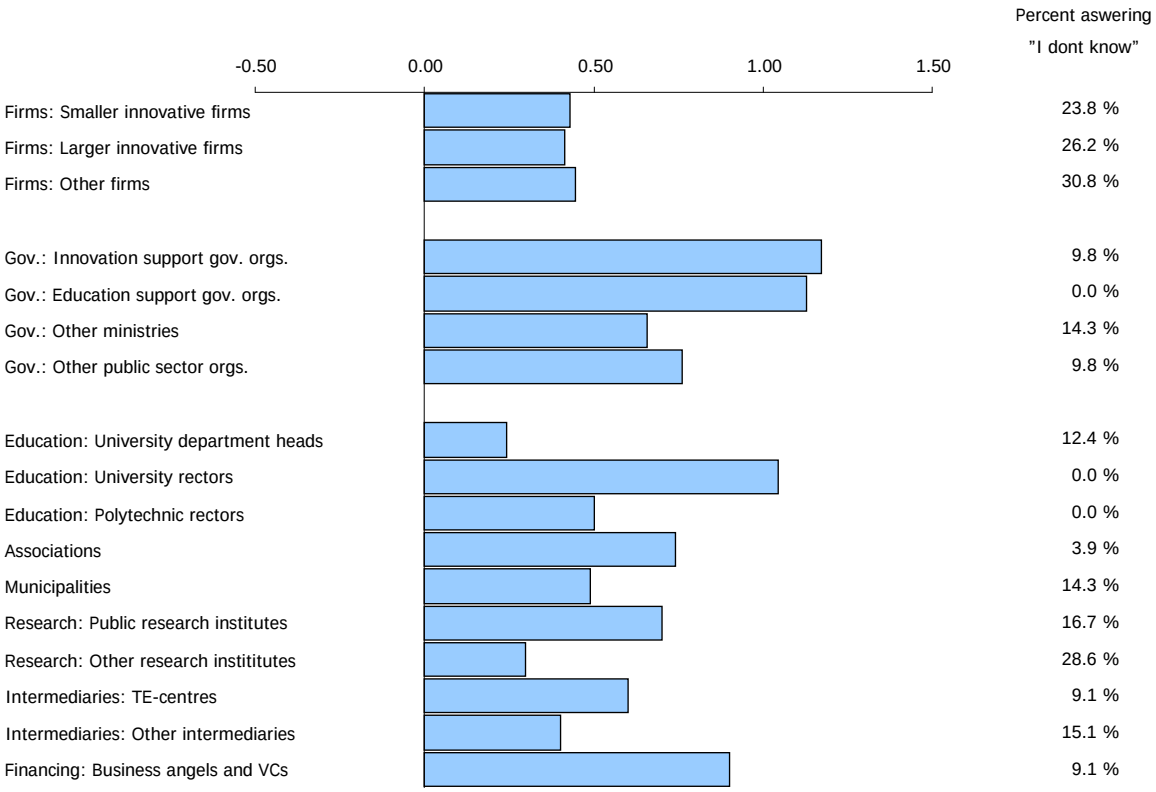


Figure 22 Will the reform of the Universities Act promote the QUALITY OF RESEARCH?



With regard to the reform's impact on the quality of research respondents drew a slightly more optimistic picture. The grading patterns across respondent groups were similar to those of the previous two questions: companies and university department heads were more pessimistic, while ministries, university rectors, associations and financiers numbered among a more optimistic group.

Figure 23 Will the reform of the Universities Act promote the SOCIETAL IMPACT?



As Figure 23 reveals, the University Act's implications regarding the various actors' possibilities to affect societal impact spawn rather positive expectations. In particular, innovation and education support organisations are convinced of the reform in this regard. Also university rectors and financiers share the same view. As one of the main agendas of the reform is to strongly promote financial, managerial and academic flexibility at universities, one might expect this to positively affect opportunities regarding the commercialization of research findings, research spin-off investment activities, cooperative research, industry-university joint ventures, and recruitment of professional management etc., factors all directly linked to societal impact.[35]

8. FINAL REMARKS

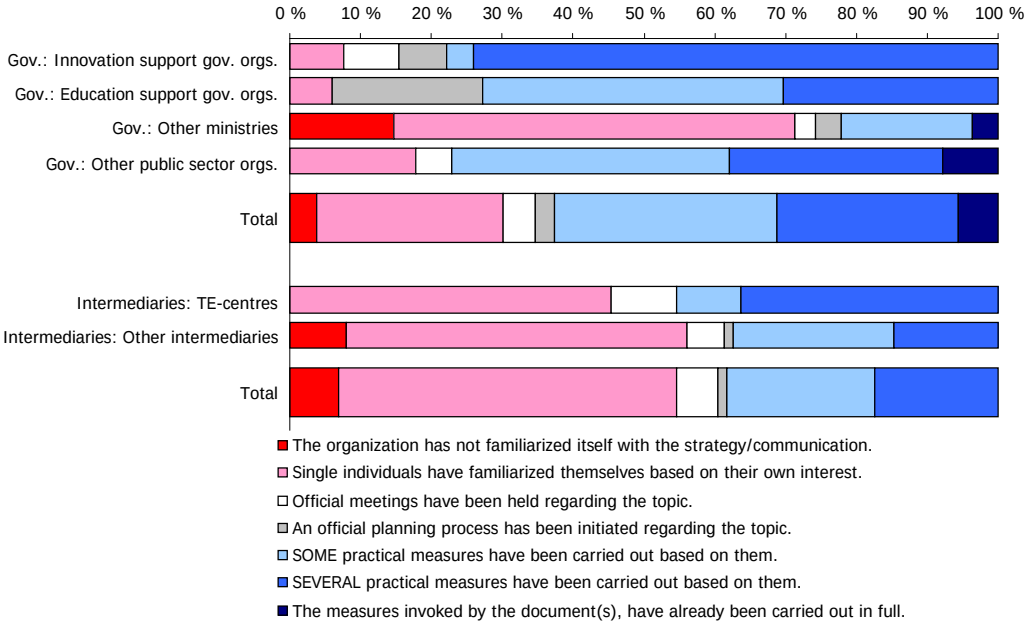
This report provided some key insights of the extensive survey conducted for the support of the evaluation of the Finnish innovation system. The report highlighted the broad-based view of the innovation system revealing the complexity of the system and the existence of overlaps between public actors. In addition, the demand- and user-driven aspects of the NIS were addressed identifying the sources of innovation and providing evidence of the system's generally technology-driven nature. Companies seemed to represent the exception drawing on the demand side of the market place as a source of innovation. In this regard, international and domestic networks were viewed as important by the more innovative companies, a result that cannot be deemed very surpris-

[35] For more information, see Appendix II page 50 and Appendix III page 93.

ing. Furthermore, regarding public policies related to the promotion of entrepreneurship it was found that private financiers, in particular, would consider tax incentives to enhance growth orientated entrepreneurship. To extend on the topic of innovation policy, most of the respondents claimed the national innovation policy to promote regional policy agendas. The respondents further argued that these agendas are unequally effective in the different regions of Finland. The higher education sector in general reported that the currently undergoing reforms have a positive impact on the sector but, interestingly, university department heads as a specific respondent group systematically greeted these changes less enthusiastically.

The respondents were also asked about the impact of the Finnish national innovation strategy, published in the fall of 2008, to their own organisation. Respondents from different sections of the public sector were asked to indicate the degree to which they have been active in implementing the strategy in their own activities. It was found that most of the public actors have taken action to incorporate the implications of the national innovation strategy into their agendas (Figure 24).[36]

Figure 24 The new national innovation strategy was published in July 2008 and the related government communication was handed to the parliament in October 2008. How has your organization reacted to these documents?



With the exception of the group designated “other ministries” public actors have taken action to implement the agenda of the national innovation strategy. While a good half of intermediaries are still in the process of familiarizing themselves with the strategy documents, ministries belonging to the category “other ministries” are clearly the least prepared. The respondents were also asked whether the strategy required changes in the activities of the public organisations in question, and the respondents from innovation and education support organisations identified a need for change in the light of the innovation strategy. Other ministries and public actors are more inclined to state that the strategy has less of an impact on their activities.[37] In addition, we were interested in how the strategy has helped in steering the activities of the respective organisation. With the exception of innovation support organisations, the strategy receives relatively low grades on how much it has helped in this respect.[38]

The insights presented in this report should be viewed as complementary to the main reports of the evaluation providing more concrete and analytic conclusions and recommendations.

[36] For more information, see Appendix II page 67 and Appendix III page 104.

[37] For more information, see Appendix II page 68 and Appendix III page 104.

[38] For more information, see Appendix II page 68 and Appendix III page 105.

APPENDIX I - Survey practicalities

This survey was executed in the early spring of 2009 as a part of the evaluation of the Finnish national innovation system (NIS). The survey aims at mapping the opinions about the current innovation system, discussing the ongoing reforms, and collecting information about the actors of the Finnish NIS. In total ten different internet-surveys were sent out[39] per e-mail to over 10 000 actors of the Finnish innovation system. The participation rate was more than satisfying, since the average response rate of the ten surveys was nearly 40 %. The INNOEVAL survey can be considered as one of the biggest national innovation surveys, since not only the companies utilizing the system, but also the organizations of the innovation system, education sector, intermediaries, financers, and foundations were contacted simultaneously.

Altogether eleven different surveys (full questionnaires available in the Appendixes IV and V) were sent out to the actors of the innovation system. Some of these respondent groups are further divided into subgroups for this report. The division, including the number of respondents, is illustrated in Table A1. On the left the original ten groups which received their personal survey, the more detailed division used in this report on the right.

Companies are divided into subgroups according to their innovation activities (innovative and non-innovative companies) and the innovative companies are further separated according to their size (less or more than 50 employees). The companies are considered innovative, if they had innovation activities during the last three years.

Public sector actors are divided into four subgroups. Group “education supporting organizations” includes the Academy of Finland (AKA) and Ministry of Education (OPM), group “innovation supporting organizations” includes the Finnish Funding for Technology and Innovation (Tekes) and the Ministry of Employment and the Economy (TEM). The group “other ministries” includes all other ministries. The remaining governmental organizations, such as Industry Investment, Research and Innovation Council (RIC), and Sitra, are in group “other public sector organizations”.

The regional innovation actors, intermediaries, are also divided into two groups, TE-centres (regional public Employment and Economic Development Centres) and other intermediaries.

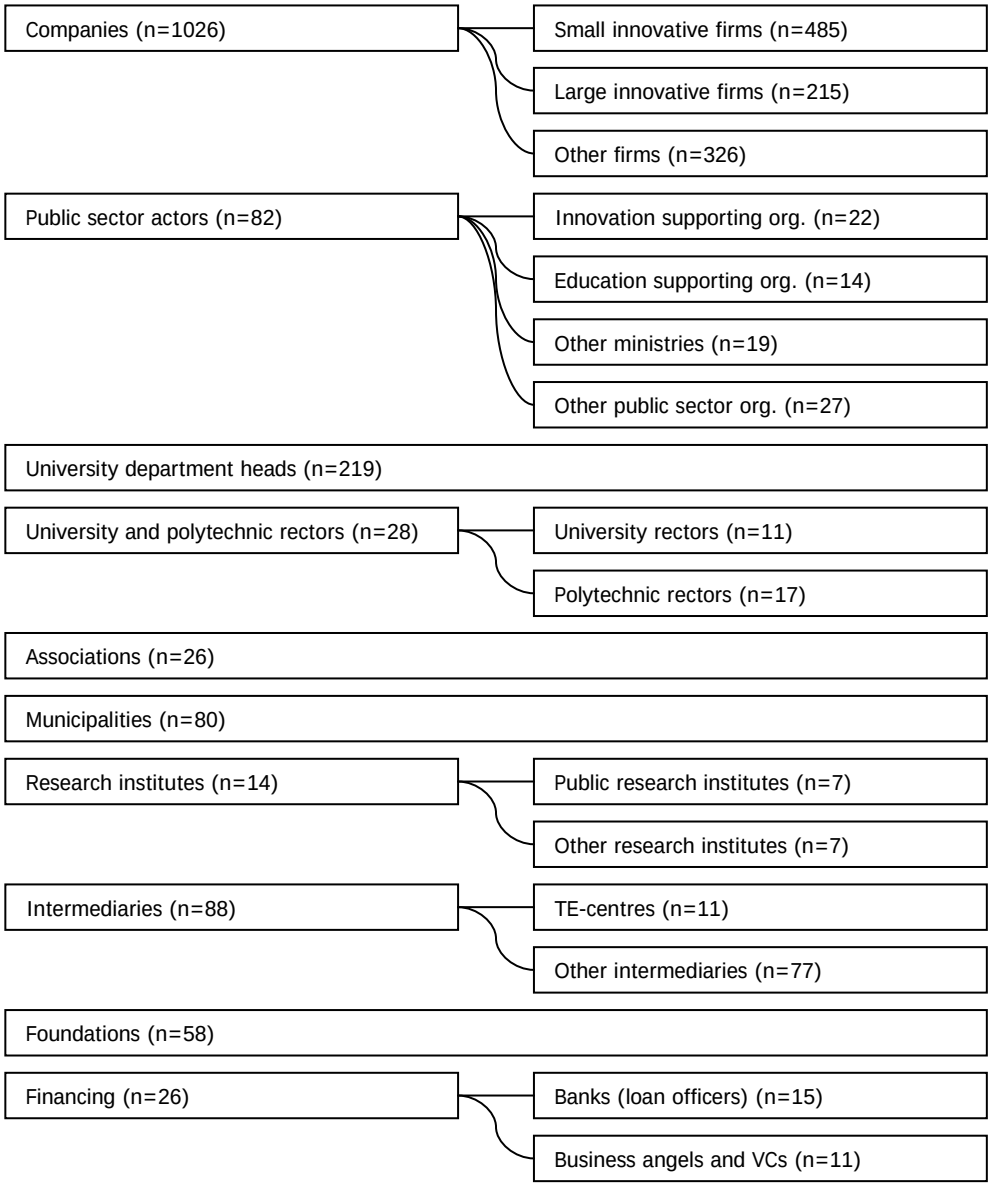
The group “financing” consists of banks’ loan officers in one subgroup and business angels (BAs) and venture capitalists (VCs) in other subgroup.

Table A1: Number of respondents and response rate of the survey

	Answers	Sent	Resp. rate
Associations	26	68	38.2%
Companies	1026	8747	11.7%
Foundations	58	151	38.4%
Intermediaries	88	189	46.6%
Municipalities	80	315	25.4%
Private financiers	26	196	32.3%
Public actors	82	158	51.9%
Research organisations	14	29	48.3%
University department heads	219	541	40.5%
University rectors	28	45	62.2%
Total	1647	10439	39.5%
	(Total)	(Total)	(Average)

[39] Business angels were contacted personally.

Figure A1: The respondent groups and number of respondents



All of the surveys (excluding foundations and banks) had first 13 questions in common. Therefore, the first 13 questions are reported simultaneously in the Appendixes II and III. After the questions identical to most of the respondent groups, the rest of each survey is described separately. If the same question is posed to more than one of the nine original respondent groups, are the results presented only once. Table A2 presents the overlapping questions, where the bolded figures show, where the results are presented.

Table A2: The overlap and presentation of questions in Appendixes II and III.

Companies	Public actors	Intermediaries	Research org.	Univ. Depart.	Rectors	Associations	Municipalities	Foundations	BAs and VCs	Banks
1	1	1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2	2	
3	3	3	3	3	3	3	3	3	3	
4	4	4	4	4	4	4	4	4	4	
5	5	5	5	5	5	5	5		5	
6	6	6	6	6	6	6	6		6	
7	7	7	7	7	7	7	7		7	
8	8	8	8	8	8	8	8		8	2
9	9	9	9	9	9	9	9		9	
10	10	10	10	10	10	10	10		10	
11	11	11	11	11	11	11	11		11	
12	12	12	12	12	12	12	12		12	
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18									15	4
									18	6
									19	7
									20	8
									21	9
									22	10

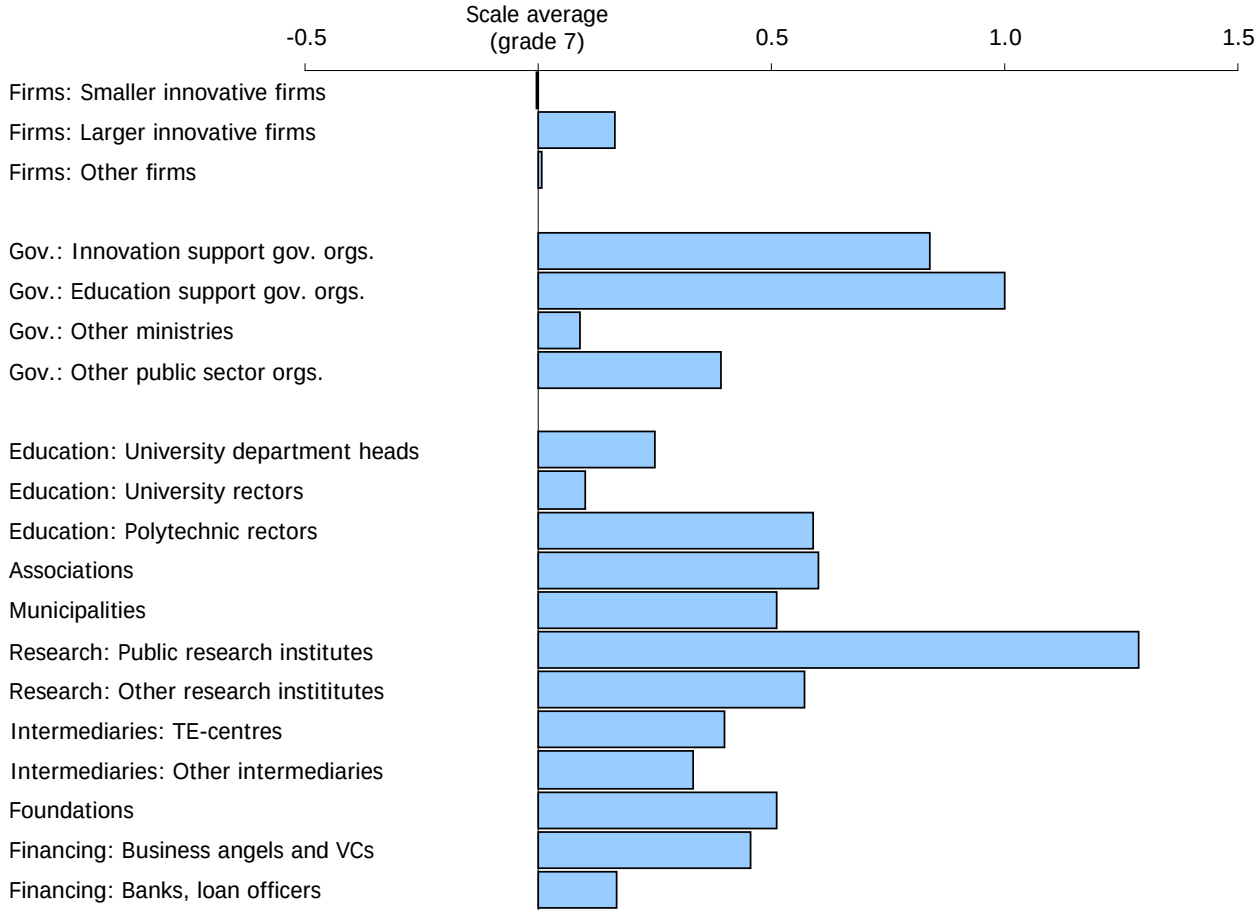
APPENDIX II - Graphical presentation of the survey results

1. Questions posed to ALL RESPONDENTS

1.1. The average grade for the innovation system slightly above satisfactory

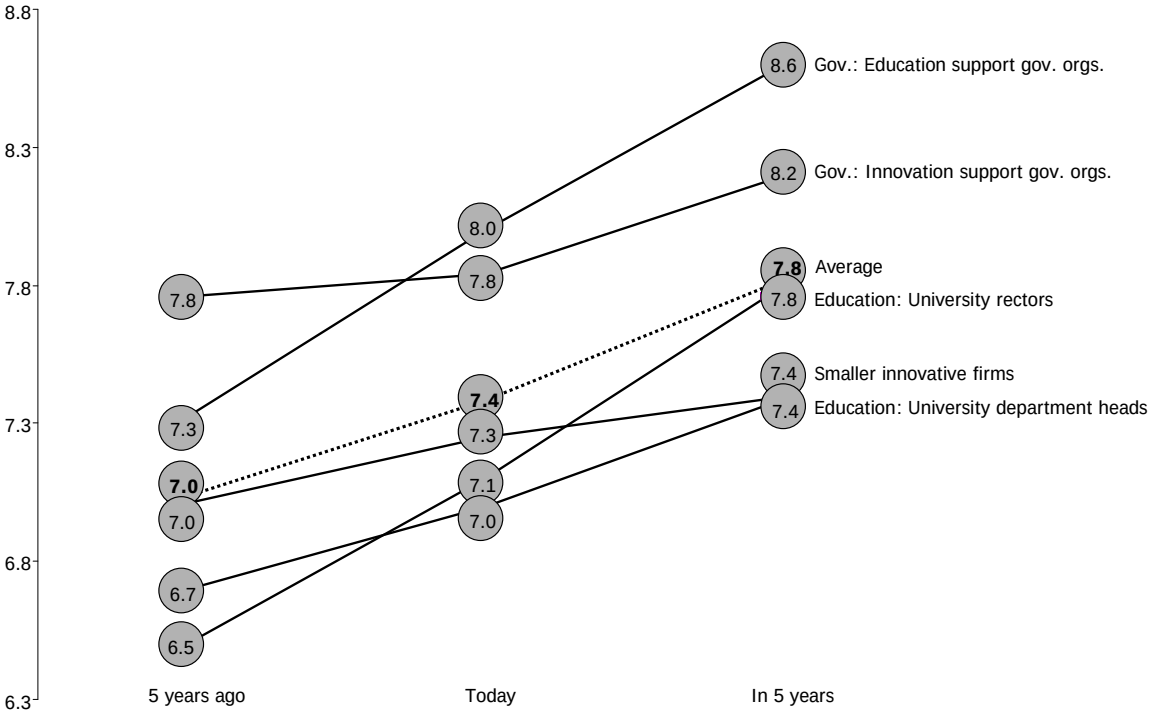
In questions 1 to 3 the respondent were asked to rate the innovation system at the moment, five years ago, and in five years, on a grading scale from 4 to 10. The answers of some selected groups of respondents are illustrated above. The average opinion states that the system is somewhat above satisfactory (7½). However, there are noteworthy differences between respondent groups. Especially large differences are to be found between firm- and public actor respondents. While firms give only an average grade of less than satisfactory (7), do innovation and education supporting governmental organizations see the system performing around “good” (8). The graph illustrates the deviations from the scale average, which is grade 7.

Q1: How would you grade the Finnish national innovation system (NIS) AT THE MOMENT?
(Scale 4 - 10)



In the following questions the respondents were asked to analyze the system five years ago and in five years. In graph Q1-3 the average opinion and some selected groups illustrate the trends of the grading.

Q1-3: If you evaluated the system as it was/is/will be 5 YEARS AGO/TODAY/in 5 YEARS, how would you grade it?
(Scale 4 -10)



On average it is seen that the development has been and will continue to be positive, as the average grade approaches “good” (8). The university rectors are the most optimistic respondent group when it comes to the development of the system - interestingly the department heads are far more careful in their grading. All of the grades are presented in table Table Q1-3

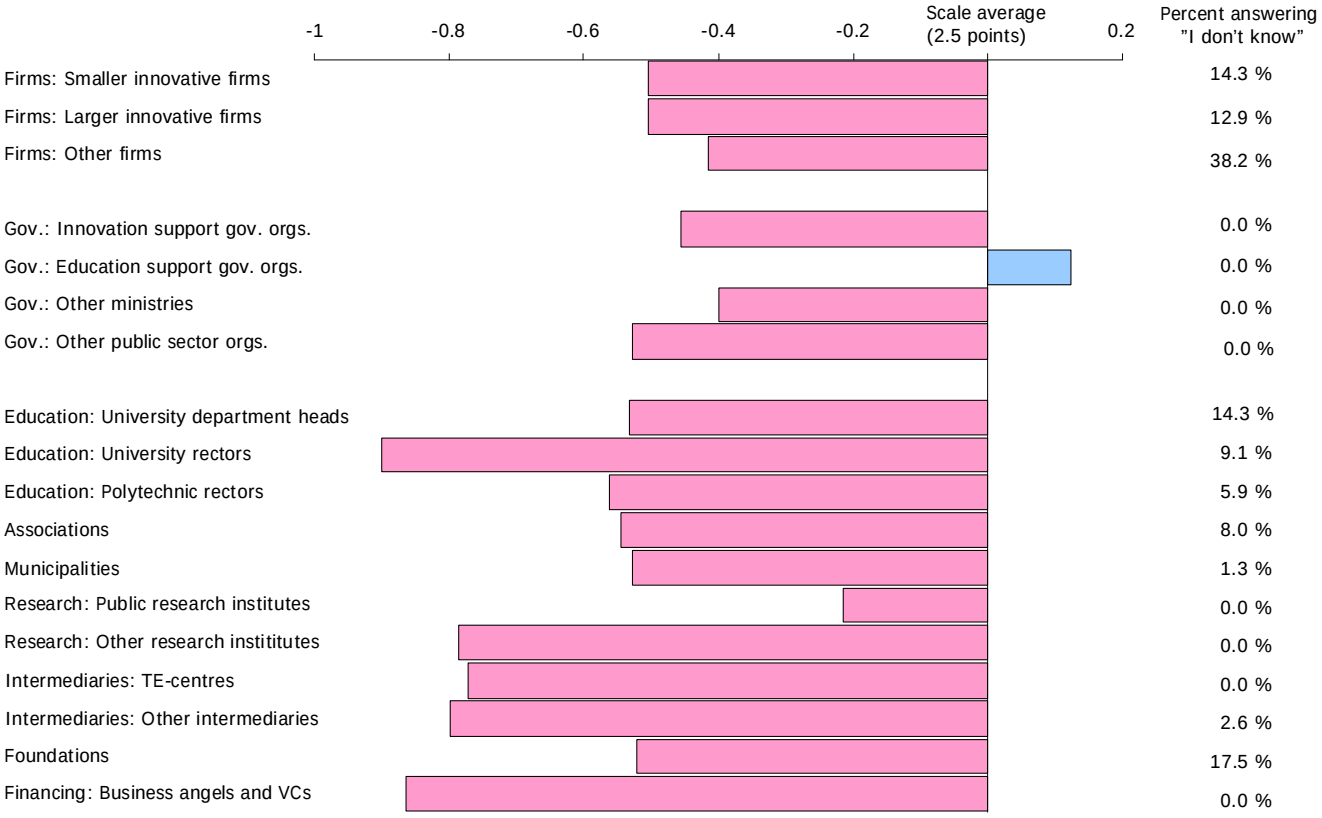
Table Q1-3: If you evaluated the system as it was/is/will be 5 YEARS AGO/TODAY/in 5 YEARS, how would you grade it?
(Scale 4 -10)

	5 years ago	*today*	*in 5 years*
Firms: Smaller innovative firms	6.7	7.0	7.4
Firms: Larger innovative firms	6.9	7.2	7.5
Firms: Other firms	6.6	7.0	7.5
Gov.: Innovation support gov. orgs.	7.8	7.8	8.2
Gov.: Education support gov. orgs.	7.3	8.0	8.6
Gov.: Other ministries	6.5	7.1	7.8
Gov.: Other public sector orgs.	7.2	7.4	8.1
Education: University department heads	7.0	7.3	7.4
Education: University rectors	6.5	7.1	7.8
Education: Polytechnic rectors	6.8	7.6	8.1
Associations	7.0	7.6	8.2
Municipals	7.1	7.5	7.9
Research: Public research institutes	8.4	8.3	8.0
Research: Other research instititutes	7.5	7.6	7.7
Intermediaries: TE-centres	7.4	7.4	7.8
Intermediaries: Other intermediaries	6.9	7.3	7.9
Foundations	7.0	7.5	7.7
Financing: Business angels, VCs	6.7	7.5	7.8
Financing: Banks, loan officers	-	7.2	-
Average	7.1	7.4	7.9

1.2. The national innovation system as a whole is considered rather complex

In question 4 the respondents evaluated the NIS as a whole. They graded the system on a scale from 1 to 4, where 1 stands for very complicated and 4 for very simple. The average grade for the system is below the scale average which indicates that according to the average opinion, the NIS is rather complicated. The university rectors have a dismal view of the complexity of the system compared to their colleagues at the polytechnics and university department heads. The education supporting government organizations stand out as the only group that considers the system rather simple. The graph illustrates the deviations from the neutral grading scale average 2.5.

Q4: How would you describe the regime constituted by the PUBLIC SECTOR actors in the NIS?
(1=very complex, 4=very simple)



1.3. The innovation system has three key players

In question 5 the respondents chose on a scale from “not at all important” (=1 point) to “very important” (=4 points) who were the most important actors in the NIS from their perspective. The results are illustrated below where the in- and out-bound connections rated as “very important” (more than 3.5 points) are drawn. Interestingly, the Finnish innovation fund Sitra, has only one in-bound connection.

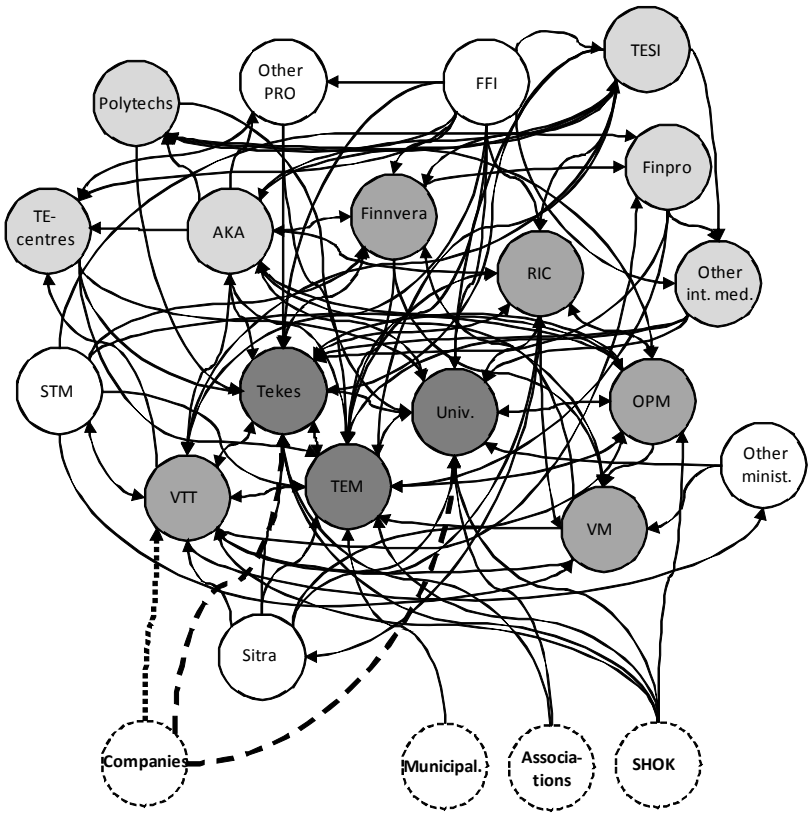
Q5: From the point of view of YOUR OWN ORGANISATION, how important do you consider the following governmental actors of the NIS?

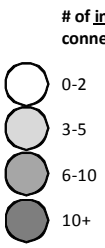
A connecting link is established if the relevance is 3.5 or higher (on a scale of 1 to 4).

Dotted circle actors have only out-bound links.

Long dotted line indicates a threshold of 3.0 (only for companies).

Short dotted line indicates a threshold of 3.0 (only for large innovative companies).



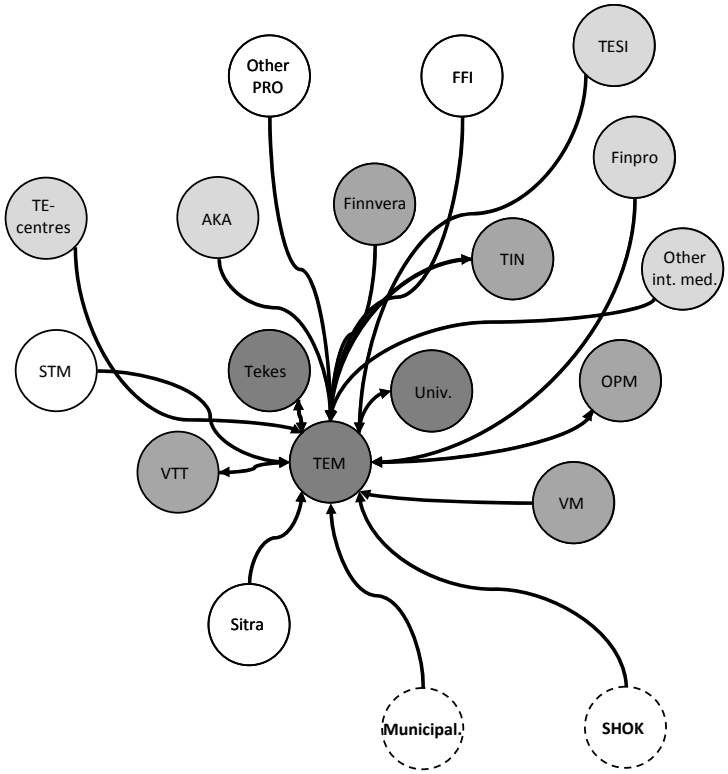


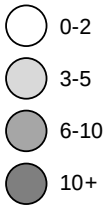
After highlighting one actor for closer look the picture becomes more informative, as the separate in- and out-bound connected can be traced. Below are the graphs for the ministry of employment and the economy (TEM) and the ministry of education (OPM).

Q5: In- and outbound links: Ministry of employment and the economy

A connecting link is established if the relevance is 3.5 or higher (on a scale of 1 to 4).

Dotted circle actors have only out-bound links.

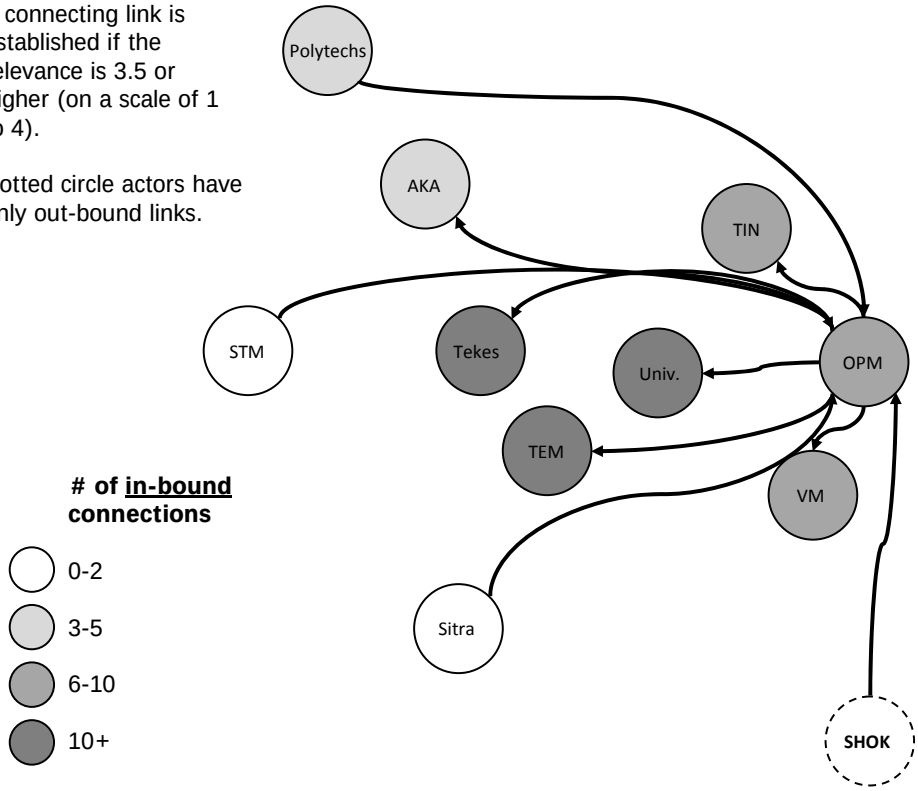




Q5: In- and out-bound links, Ministry of education

A connecting link is established if the relevance is 3.5 or higher (on a scale of 1 to 4).

Dotted circle actors have only out-bound links.



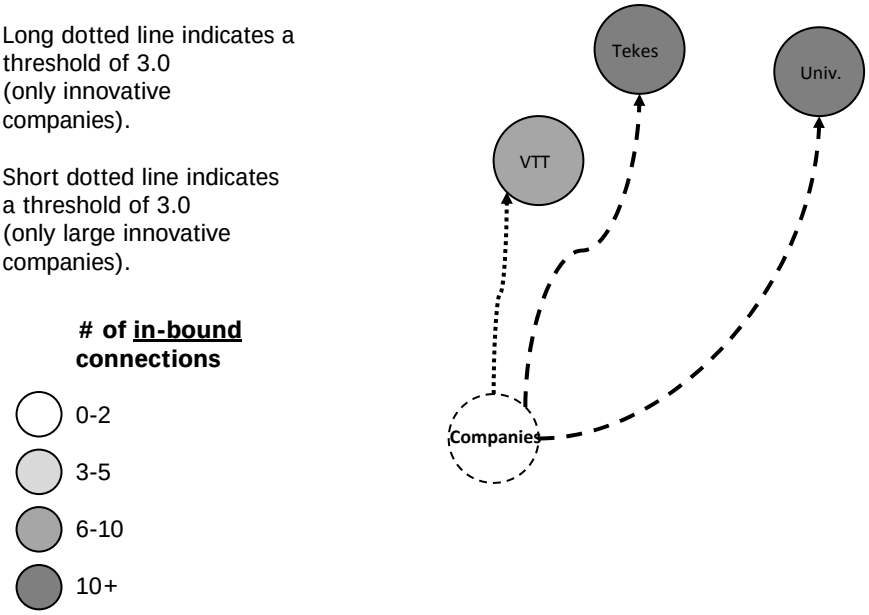
The companies were not on the list of actors, who could have been chosen as important actors of the system. However, companies themselves did choose the most important actors from their perspective. The threshold of 3.5 used in the previous graphs is set down to only 3 (scale 1=not at all important, 4=very important). Still only two actors, Tekes and the Universities are named as “rather important” by both small and large innovative companies. In addition, VTT (Governments technical research centre) is rated as “rather important” by large innovative companies.

Q5: Out-bound links, companies

Dotted circle actors have only out-bound links.

Long dotted line indicates a threshold of 3.0 (only innovative companies).

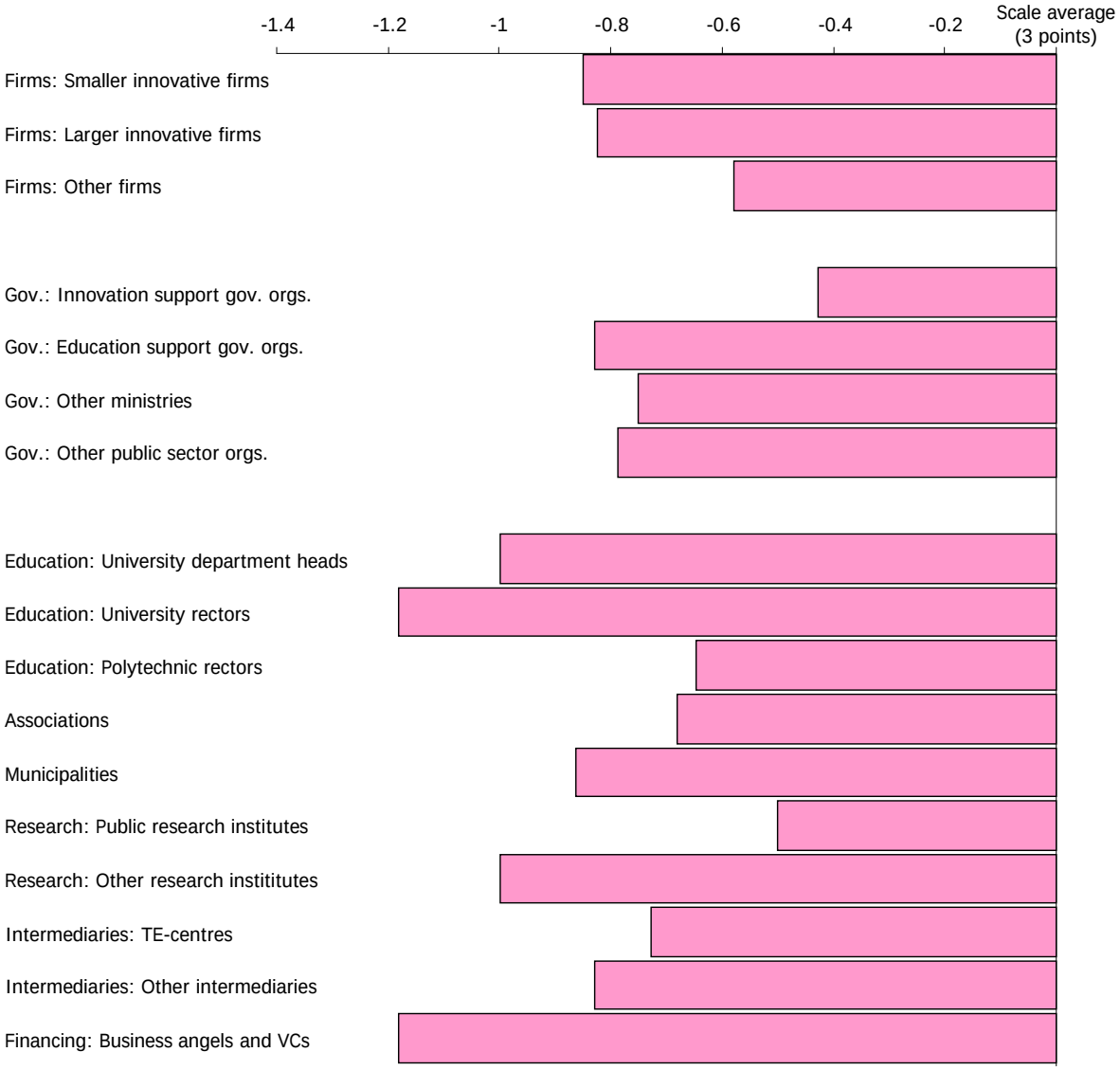
Short dotted line indicates a threshold of 3.0 (only large innovative companies).



1.4. The national innovation policy is considered rather technology driven

Demand- and user-driven innovation policy is one of the four main themes of the new national innovation strategy. In question 6 the respondent were asked to evaluate the national innovation policy in terms of “technology push” and “demand pull” on a scale from 1 to 5 (1=very tech-push oriented, 5=very demand-pull oriented). The average grade is notably below the neutral grade 3 and, in fact, not one of the respondent groups gives a grade greater than the neutral 3. The graph illustrates the deviations from the average grade 2.19.

Q**6: “Technology push” and “demand pull” are alternative concepts that often characterize the orientation of innovation policies. Which of the two characterizes the Finnish national innovation policy best?**
(1=strong tech-push, 2=tech-push, 3= in between, 4= demand-pull, 5= strong demand-pull)



1.5. Universities', polytechnics', and public research organizations' strengths differ

In question 7 the respondents were asked to indicate whether the following actor takes WELL care of the task by checking a check-box. The evaluated actors were universities, polytechnics and public research organizations (PROs). The percentages of respondents checking the box of the respective actor are tabulated in Table Q7. Notably low percentages are highlighted in grey and the notably high percentages are bolded.

In the field of international top-class research the university is seen as the strongest, as on average 93 % of the respondents consider that they take well care of the task. The corresponding fraction for the polytechnics is 3 % and for the public research organizations 33 %. In the field of research the universities and PROs are appreciated equally, as around two out of three respondents agree that the organizations take well care of the task. Universities are also the most appreciated organization in supplying experts for the international needs, whereas polytechnics are seen as the best source of experts for local needs. Not surprisingly all three respondent groups see their own performance more positively than other respondents on average. All of the percentages are presented in Table Q7.

Table Q7: In the NIS universities, polytechnics, and public research organisations have their own roles. Indicate by checking the respective boxes WHETHER the listed actors SUCCESSFULLY take care of the following tasks.

International top-class research	Univ.	Polytech.	PRO's
Firms: Smaller innovative firms	90 %	4 %	25 %
Firms: Larger innovative firms	91 %	3 %	25 %
Firms: Other firms	84 %	6 %	26 %
Total	89 %	4 %	25 %
Gov.: Innovation support gov. orgs.	92 %	n.a.	43 %
Gov.: Education support gov. orgs.	**100 %**	n.a.	**71 %**
Gov.: Other ministries	85 %	n.a.	38 %
Gov.: Other public sector orgs.	**100 %**	n.a.	41 %
Total	96 %	n.a.	43 %
Education: Univ. department heads	**100 %**	0 %	24 %
Education: University rectors	**100 %**	0 %	30 %
Education: Polytechnic rectors	87 %	**20 %**	53 %
Associations	89 %	0 %	37 %
Municipalities	91 %	3 %	28 %
Research: Public research institutes	71 %	0 %	**71 %**
Research: Other research instititutes	**100 %**	0 %	20 %
Intermediaries: TE-centres	75 %	0 %	**63 %**
Intermediaries: Other intermediaries	88 %	3 %	47 %
Financing: Business angels and VCs	**100 %**	0 %	33 %
Total	95 %	2 %	33 %
Average	93 %	3 %	34 %

Research for the national needs	Univ.	Polytech.	PRO's
Firms: Smaller innovative firms	56 %	34 %	51 %
Firms: Larger innovative firms	65 %	32 %	52 %
Firms: Other firms	60 %	34 %	43 %
Total	59 %	34 %	49 %
Gov.: Innovation support gov. orgs.	**89 %**	34 %	**82 %**
Gov.: Education support gov. orgs.	63 %	49 %	**94 %**
Gov.: Other ministries	55 %	12 %	**85 %**
Gov.: Other public sector orgs.	73 %	**50 %**	75 %
Total	69 %	39 %	79 %
Education: Univ. department heads	**80 %**	27 %	68 %
Education: University rectors	**82 %**	18 %	45 %
Education: Polytechnic rectors	65 %	**94 %**	59 %
Associations	68 %	14 %	73 %
Municipalities	65 %	43 %	62 %
Research: Public research institutes	71 %	0 %	71 %
Research: Other research instititutes	50 %	0 %	**83 %**
Intermediaries: TE-centres	56 %	33 %	33 %
Intermediaries: Other intermediaries	69 %	**53 %**	53 %
Financing: Business angels and VCs	67 %	33 %	78 %
Total	75 %	34 %	64 %
Average	68 %	36 %	64 %

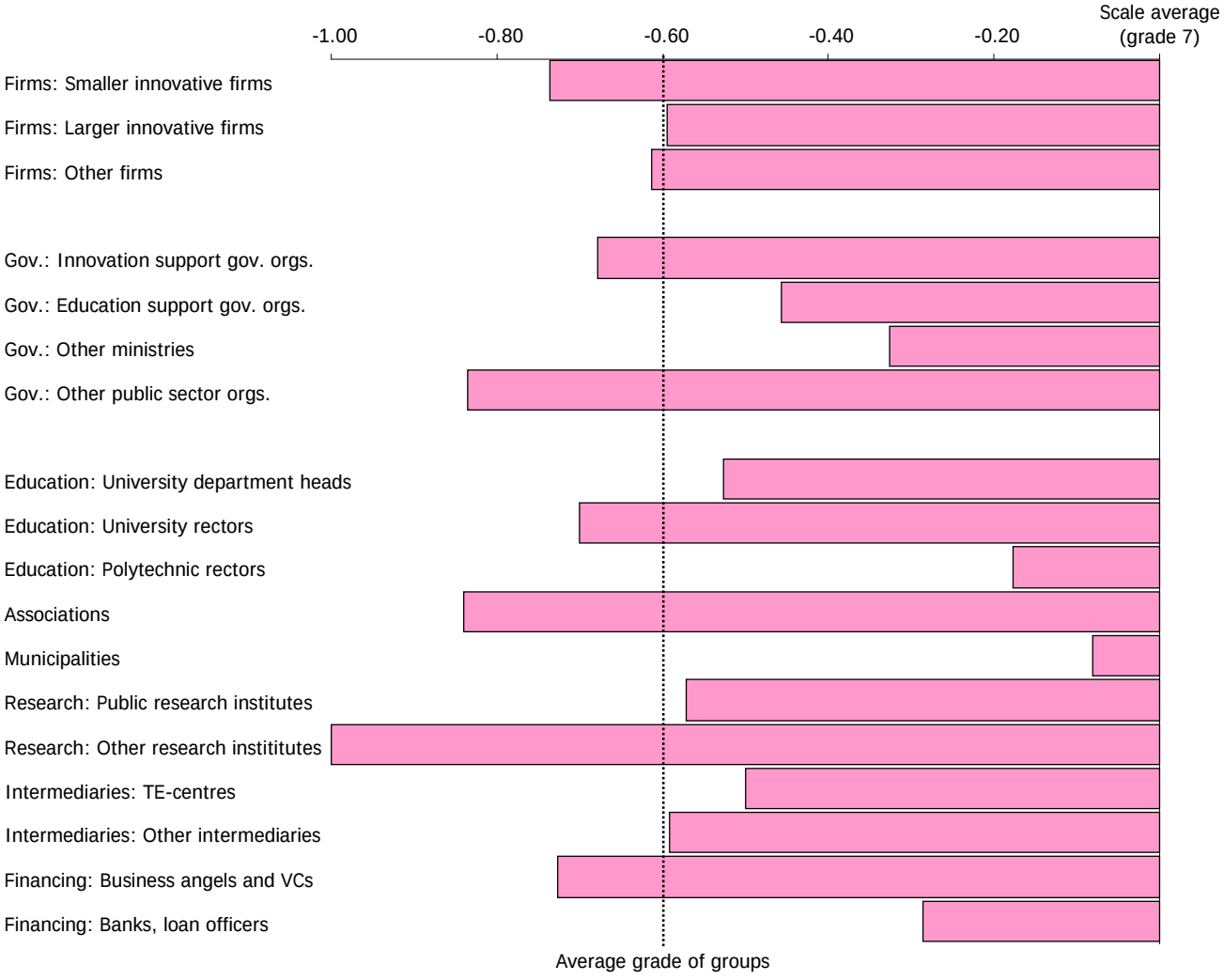
Production of experts for the international business activities	Univ.	Polytech.	PRO's
Firms: Smaller innovative firms	82 %	26 %	14 %
Firms: Larger innovative firms	85 %	29 %	17 %
Firms: Other firms	83 %	27 %	11 %
Total	83 %	27 %	14 %
Gov.: Innovation support gov. orgs.	74 %	9 %	26 %
Gov.: Education support gov. orgs.	**100 %**	14 %	0 %
Gov.: Other ministries	52 %	33 %	**48 %**
Gov.: Other public sector orgs.	98 %	26 %	9 %
Total	87 %	26 %	17 %
Education: Univ. department heads	92 %	25 %	12 %
Education: University rectors	**100 %**	17 %	0 %
Education: Polytechnic rectors	80 %	**73 %**	20 %
Associations	87 %	13 %	7 %
Municipalities	86 %	28 %	14 %
Research: Public research institutes	43 %	29 %	29 %
Research: Other research instititutes	**100 %**	0 %	**50 %**
Intermediaries: TE-centres	88 %	38 %	13 %
Intermediaries: Other intermediaries	92 %	37 %	15 %
Financing: Business angels and VCs	55 %	0 %	0 %
Total	89 %	28 %	13 %
Average	86 %	27 %	15 %

Production of experts for the needs of local business activities	Univ.	Polytech.	PRO's
Firms: Smaller innovative firms	39 %	82 %	13 %
Firms: Larger innovative firms	46 %	86 %	13 %
Firms: Other firms	35 %	78 %	12 %
Total	39 %	82 %	13 %
Gov.: Innovation support gov. orgs.	59 %	**100 %**	16 %
Gov.: Education support gov. orgs.	46 %	94 %	**40 %**
Gov.: Other ministries	40 %	74 %	26 %
Gov.: Other public sector orgs.	61 %	92 %	20 %
Total	55 %	89 %	23 %
Education: Univ. department heads	62 %	85 %	16 %
Education: University rectors	**78 %**	78 %	11 %
Education: Polytechnic rectors	18 %	**100 %**	6 %
Associations	65 %	78 %	13 %
Municipalities	41 %	89 %	16 %
Research: Public research institutes	17 %	83 %	17 %
Research: Other research instititutes	33 %	83 %	0 %
Intermediaries: TE-centres	30 %	**100 %**	10 %
Intermediaries: Other intermediaries	45 %	92 %	12 %
Financing: Business angels and VCs	50 %	90 %	10 %
Total	55 %	87 %	14 %
Average	50 %	86 %	16 %

1.6. NIS's ability to support growth entrepreneurship and generate rapidly growing companies is graded as fair

In question 8 the respondents were asked how they grade the NIS in promoting growth entrepreneurship and generating rapidly growing companies in Finland on a scale from 4 to 10. The average grade 6.4 is below the neutral grade 7 but there is significant diversity among the respondents. The most satisfied respondent group is the municipals who grant the grade "satisfactory" (7.0). The lowest score "fair" (6.0) is given by the non-public research institutes. Among the group firms the respondent group of smaller innovative firms stand out, as they deviate downwards from the grades of the larger innovative and other firms. The graph illustrates the deviations from the scale average 7.

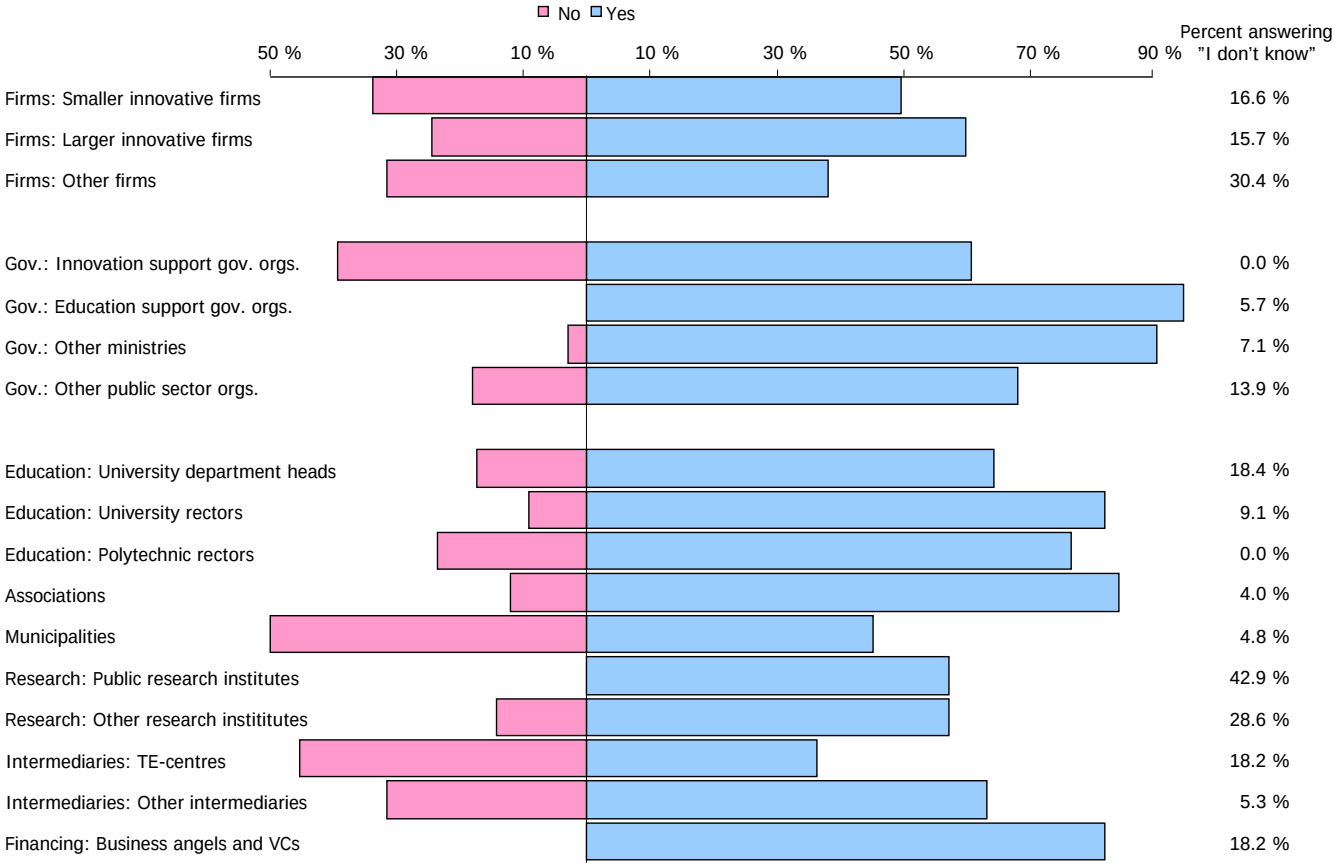
Q8: One of the objectives of the NIS is to promote growth entrepreneurship and generate rapidly growing companies in Finland. How would you grade the system in this respect?
(Scale 4 -10)



1.7. The NIS promotes the agendas of regional policy

In question 9 the respondents evaluated, whether they consider that the NIS promotes also the agendas of regional policy. Since innovation policy should not officially be a tool of regional policy, are the results interesting. Even the regional actors, municipals and TE-centres, say that NIS also has a regional agenda. Still they are the only respondent groups that answer more often “no” than “yes”. The respondents from education supporting government organizations and public research institutes see are united in their opinion, that the NIS promotes the agendas of regional policy.

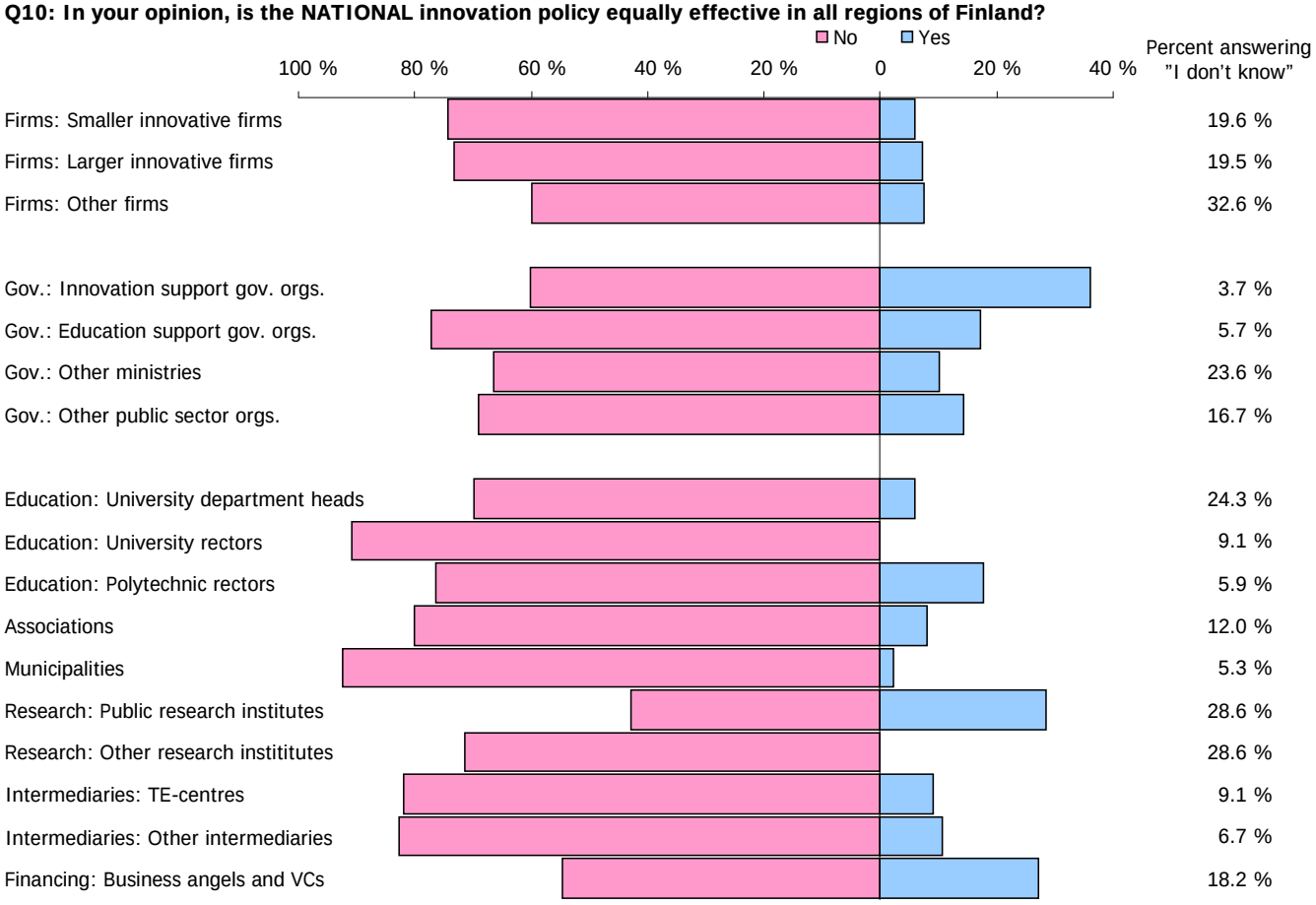
Q9: Would you say the NIS promotes also agendas of regional policy?



1.8. The efficiency of the national innovation policy differs across Finland

In the previous question the respondent evaluated the regional policy -dimension of the NIS. In question 10 the respondents were asked, if the national innovation policy is equally effective in all regions of Finland. The general opinion is clear - in all of the respondent groups the majority of individual respondents see that the national innovation policy is not equally effective in all regions of Finland. Even from the governmental innovation supporting organizations (Tekes and TEM), 60 % of the respondents believe, that there are efficiency differences across regions.

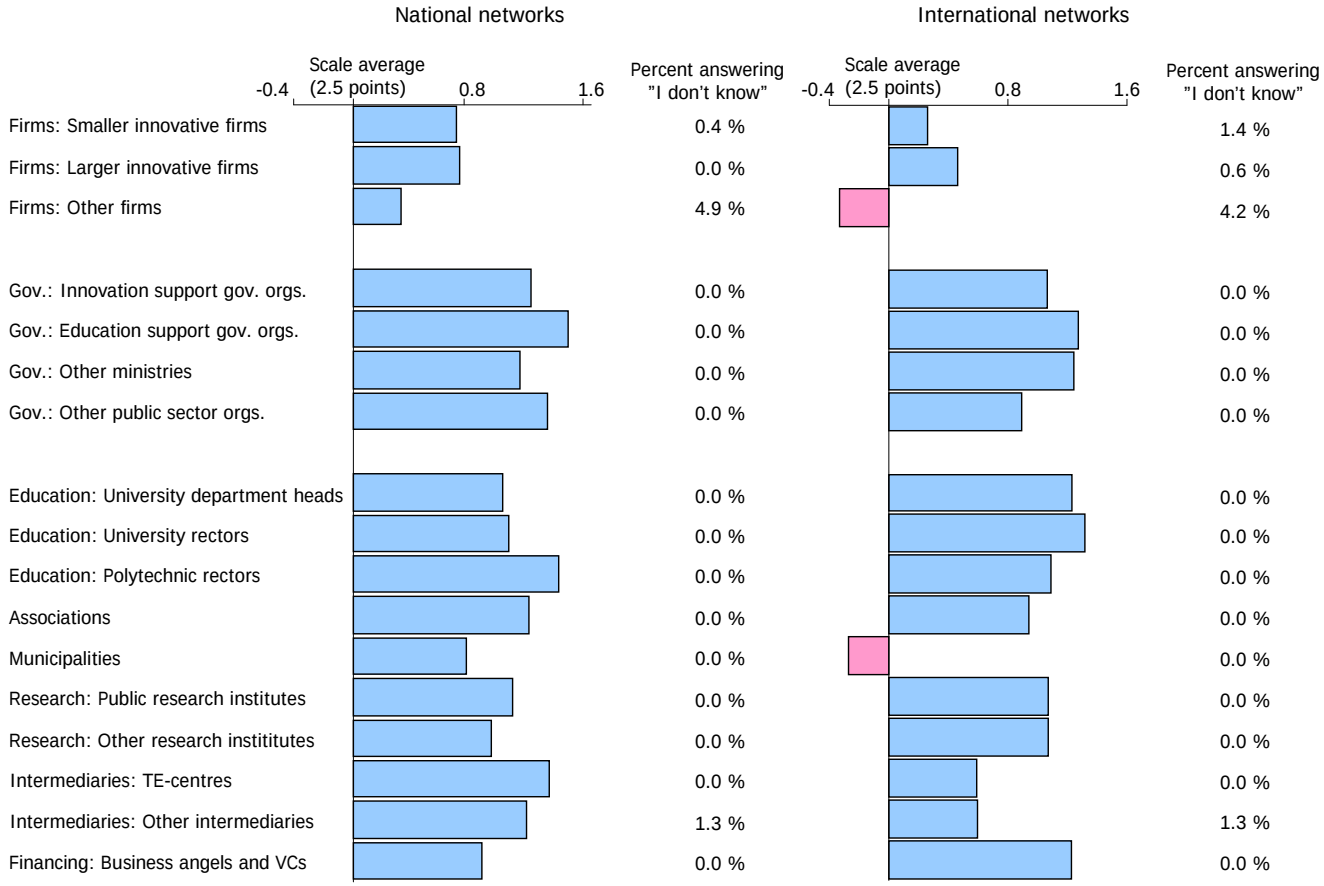
Q10: In your opinion, is the NATIONAL innovation policy equally effective in all regions of Finland?



1.9. National networks slightly more important than international networks

In questions 11 and 12 the respondents were asked to evaluate the importance of national and international networks for their organization on a scale from not at all important (=1) to very important (=4). As the average grade in both of the questions rises above 3, are both national and international networks seen as important for the activities of the organization. However, national networks are on average graded somewhat more important than international networks. Interestingly companies are in both questions below the general average and the group “other firms” see the importance of international networks as “not very important”.

Q11-12: How important are NATIONAL / INTERNATIONAL networks for the activities of your organisation?
(1=not at all important, 4=very important)



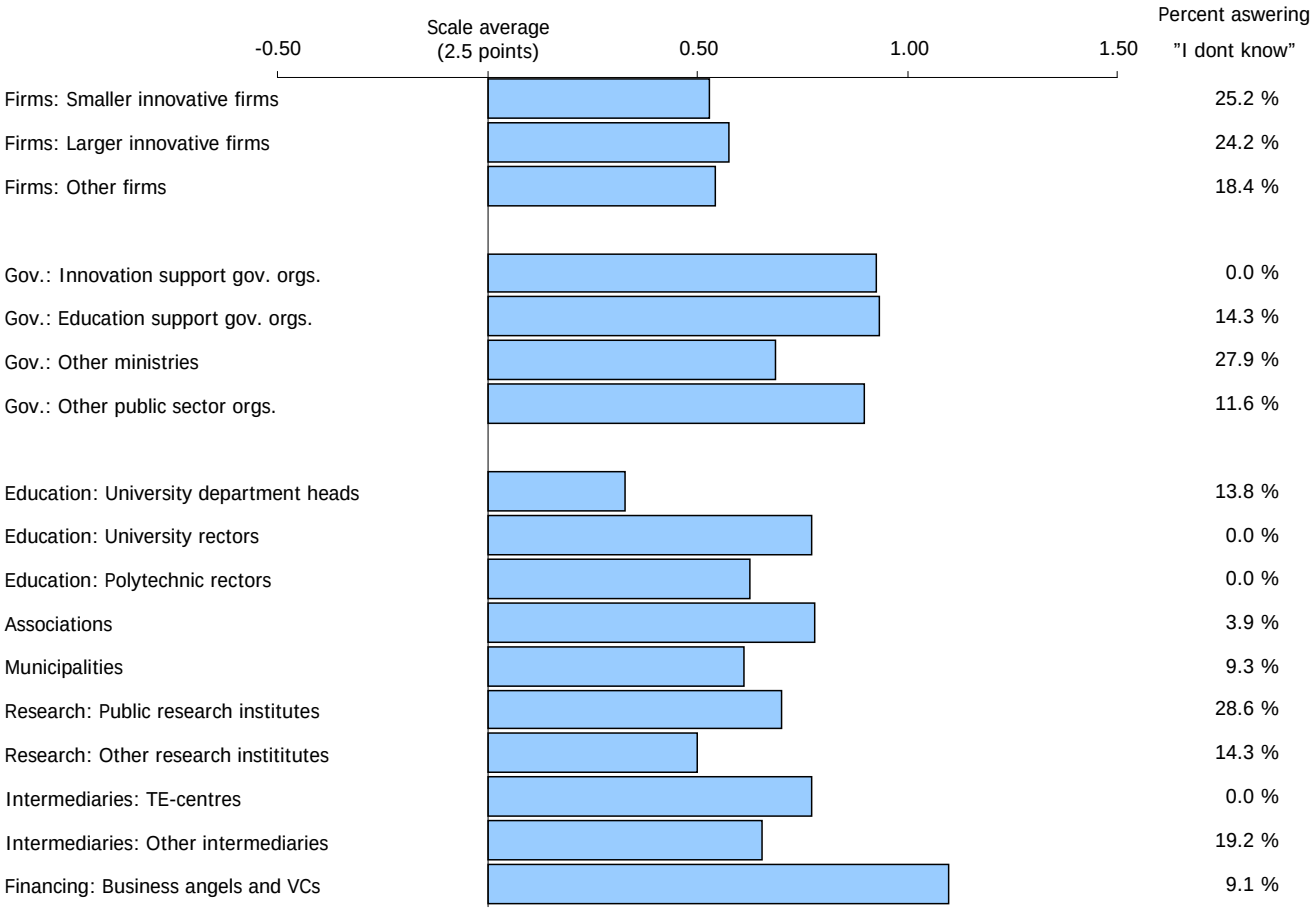
1.10. The respondents carefully optimistic about the impacts of the forthcoming reforms.

In question 13 the respondents evaluated 6 statements concerning the ongoing reforms in the Finnish innovation system. In the following the results for each statement are compared separately. The grading scale was from “completely disagree” (=1 points) to “completely agree” (=4 points). The graphs illustrate the deviation from the scale average, which is the “neutral” grade equalling 2.5. Respondent groups deviating downwards from the neutral 2.5 are plotted in red and the group averages deviating upwards are in blue. On the right is the fraction of respondents for each group answering “I don’t know”.

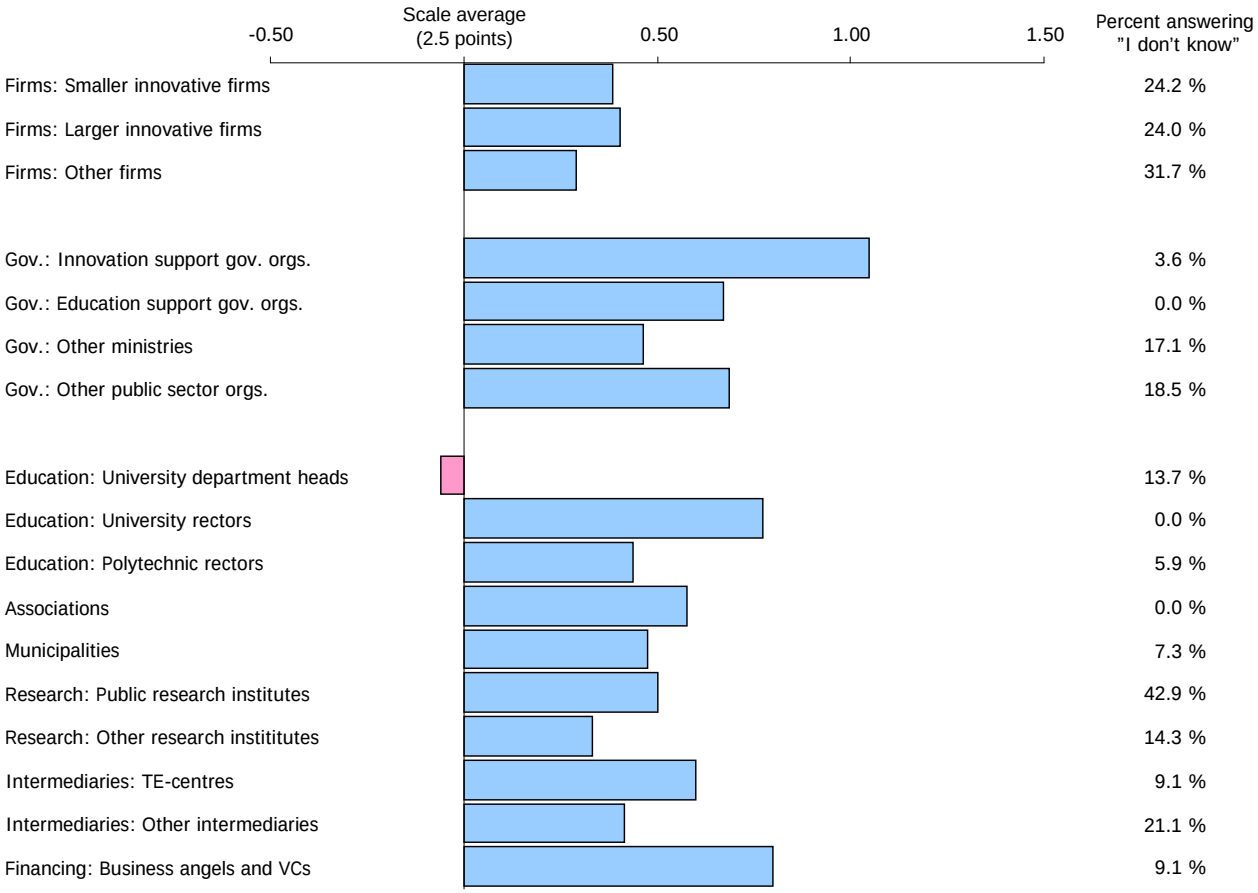
The first four statements handle the forthcoming reform of the universities act (Yliopistouudistus). In all four statements the average grade is around the grade 3, “somewhat agree”. Regardless of the statement, the following remarks can be made. It can be noted that the companies’ level of agreement is in all four questions rather homogenous. An interesting detail is, that in all four questions concerning the reform of the universities act the University department heads seem to have very different levels of agreement - the rectors have great confidence in the results of the act, whereas the department heads are more pessimistic.

Q13: The forthcoming reform of the UNIVERSITIES ACT (Yliopistouudistus) will promote...

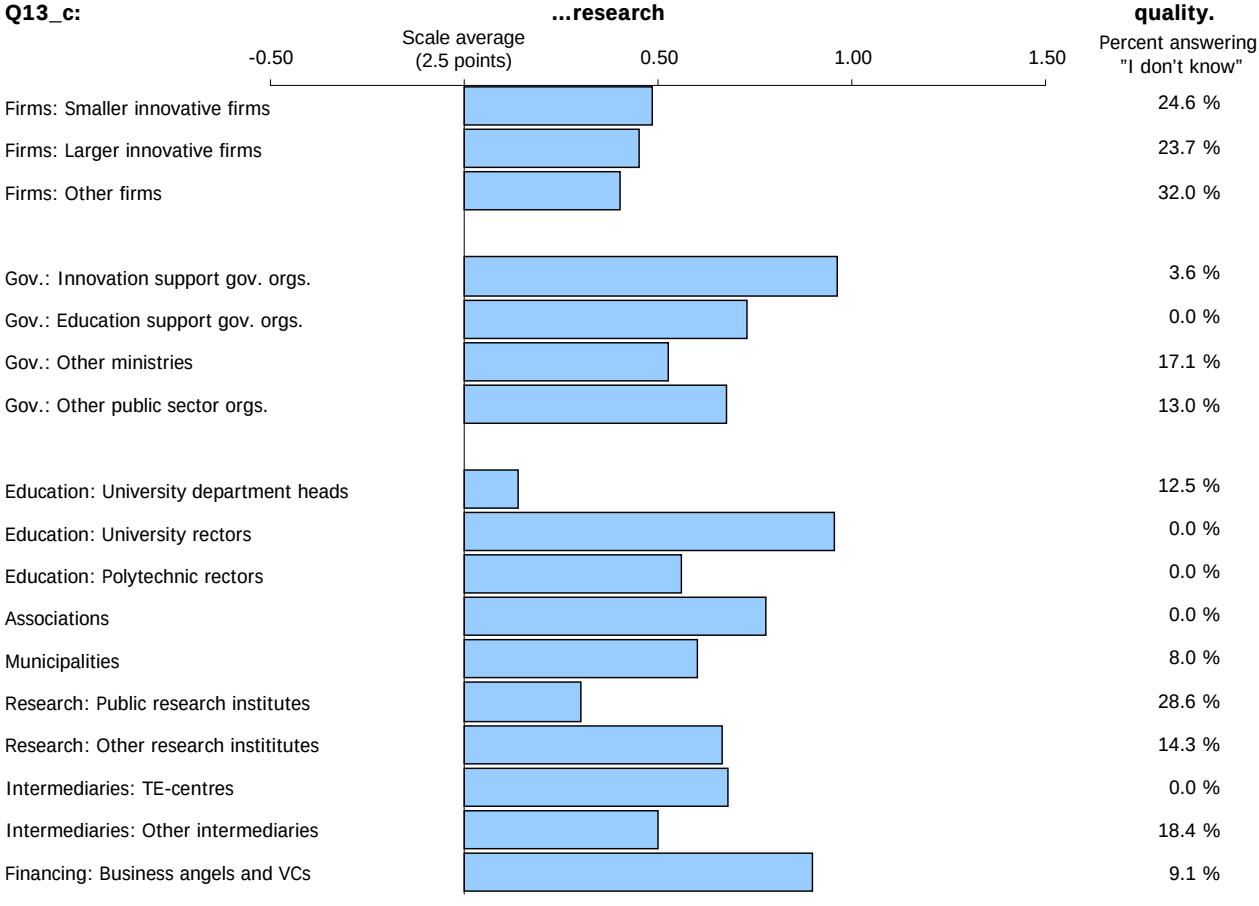
Q13_a: ...internationalization.



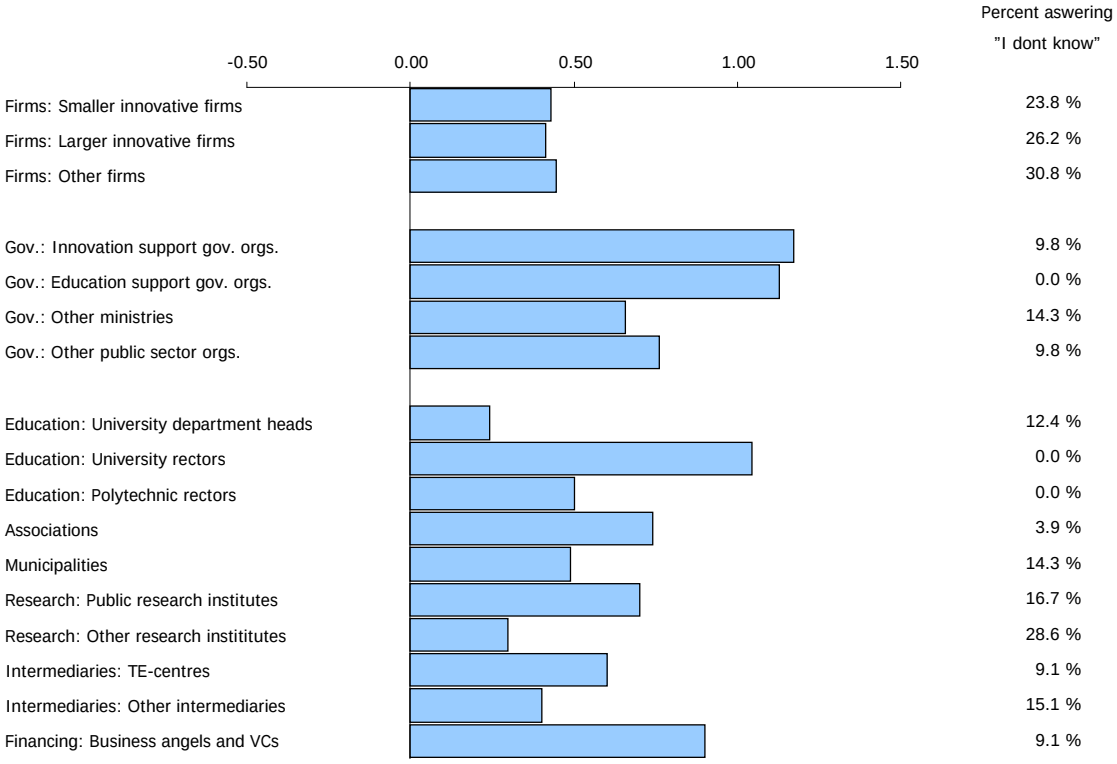
Q13_b: ...teaching quality.



Q13_c: ...research quality.

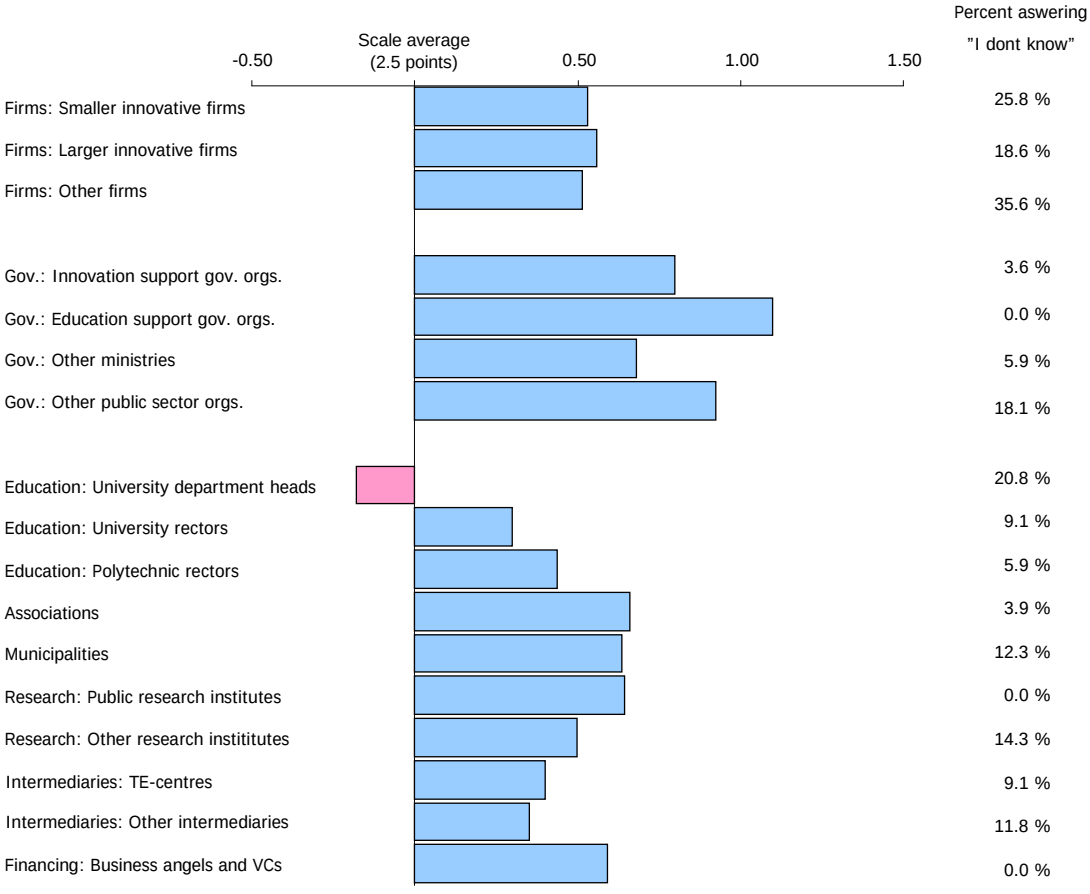


Q13_d: ...societal impact.



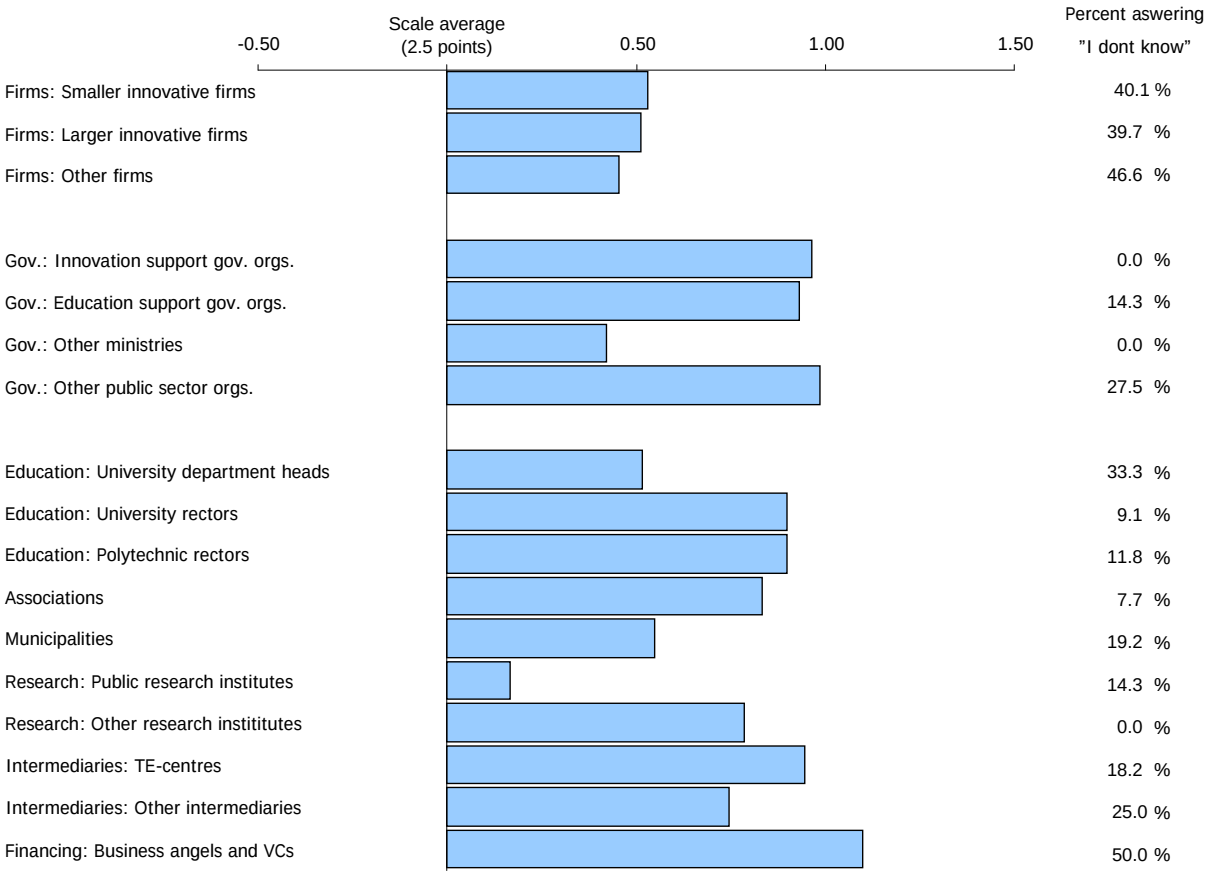
The following three statements were also measured by the same scale from “completely disagree” (=1 points) to “completely agree” (=4 points). They concerned the centres of strategic excellence (SHOKs), the potential reform of publicly funded research organisations, and the reform of the University Inventions Act.

Q13_e: The centres of strategic excellence (SHOKs) enhance the system’s performance.



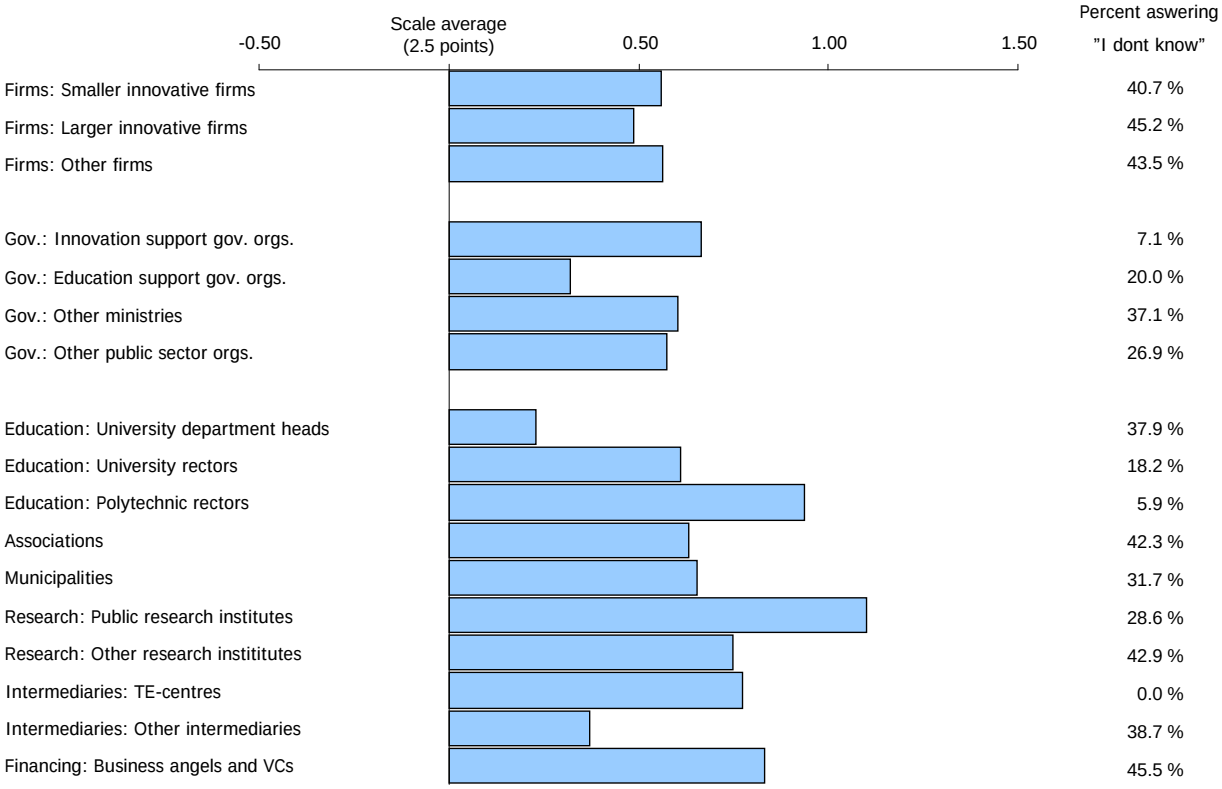
The graph concerning the centres of strategic excellence (SHOKs) provides several interesting results. University department heads, “the grass-roots -level actors”, are well below the average, whereas all public actors believe in the positive impacts of the SHOKs. Especially education supporting government organizations have high hopes for the SHOKs, as their average answer is “completely agree”.

Q13_f: The potential reform of publicly funded research organisations would enhance the system’s performance.



The sixth statement asks about the respondents opinions about the potential reform of publicly funded research organizations. Interestingly, the public research institutes see the potential reform in the most negative light followed by the group of other ministries. The companies are again very homogenous in their opinion and it must be noted that the fraction of companies answering “I don’t know” ranges from 40 to 47 percentages.

Q13_g: The reform of the University Inventions Act will enhance the co-operation between companies, universities and polytechnics.



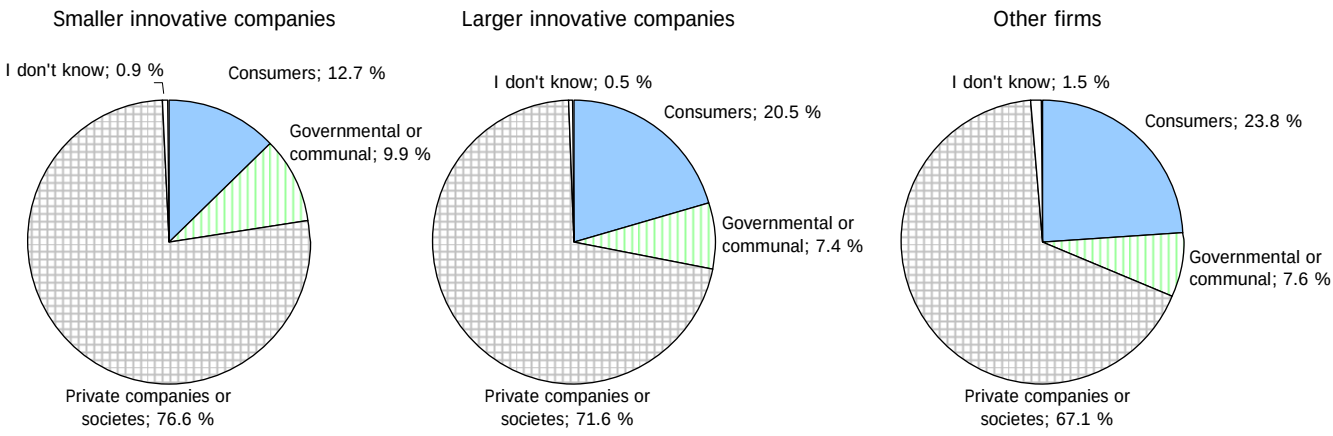
In the statement concerning the university inventions act the respondents are on average carefully optimistic. Perhaps the most interesting information is, however, the percent answering "I don't know", since in several groups around 40 percent of the respondents do not have an opinion or they are unfamiliar with the content.

2. Additional questions posed to COMPANIES

2.1. Little variance in primary sources of earnings among companies

The division of income sources into *consumers*, *governmental or communal entities*, and *private companies or societies* reveals little differences between small innovative, large innovative, and other types of companies. There is a slight tendency towards increasing the share of consumers as a source of income with growing size and decreasing R&D intensity of companies. In large innovative companies the share of consumer generated income is twice as large as in small innovative companies. Across all company types *private companies and societies* constitute the dominating income source.

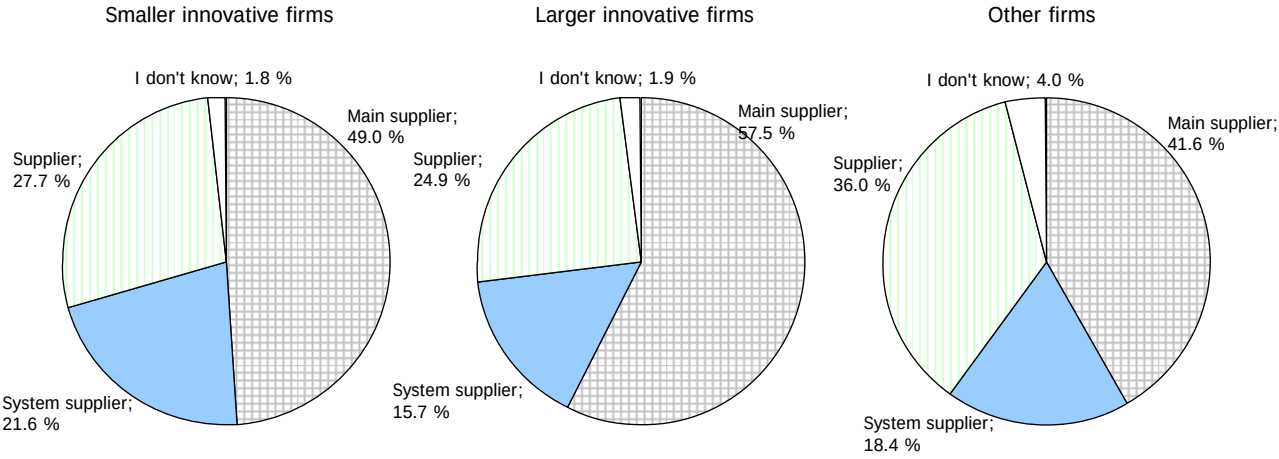
Q14: What is your company's primary source of earnings?



2.2. Large innovative companies relatively more often in the role of main supplier

Innovative companies seem to occupy the position of the main supplier, i.e. the vendor and designer of comprehensive solutions and end products, relatively more often than non-innovative companies. Roughly a fourth of small and large innovative companies play the role of sub-contractor providing products and services to be part of their customers' offerings, while at least half of them are reportedly main suppliers. Among the less innovative companies the respective figures are 36 and 42 percent. This could be the manifestation of a technology- and IPR-driven mode of business that entails protecting proprietary technologies by developing entire systems and solutions that do not require in-depth co-operation with third parties prone to knowledge-spillovers. Causality can be read into the results also in reverse: developing entire systems and solutions simply require higher R&D inputs than the design and manufacturing of single parts thereof. Thus, companies designing complete solutions implicitly are more innovative.

Q15: What is your company's primary position in the distribution chain?

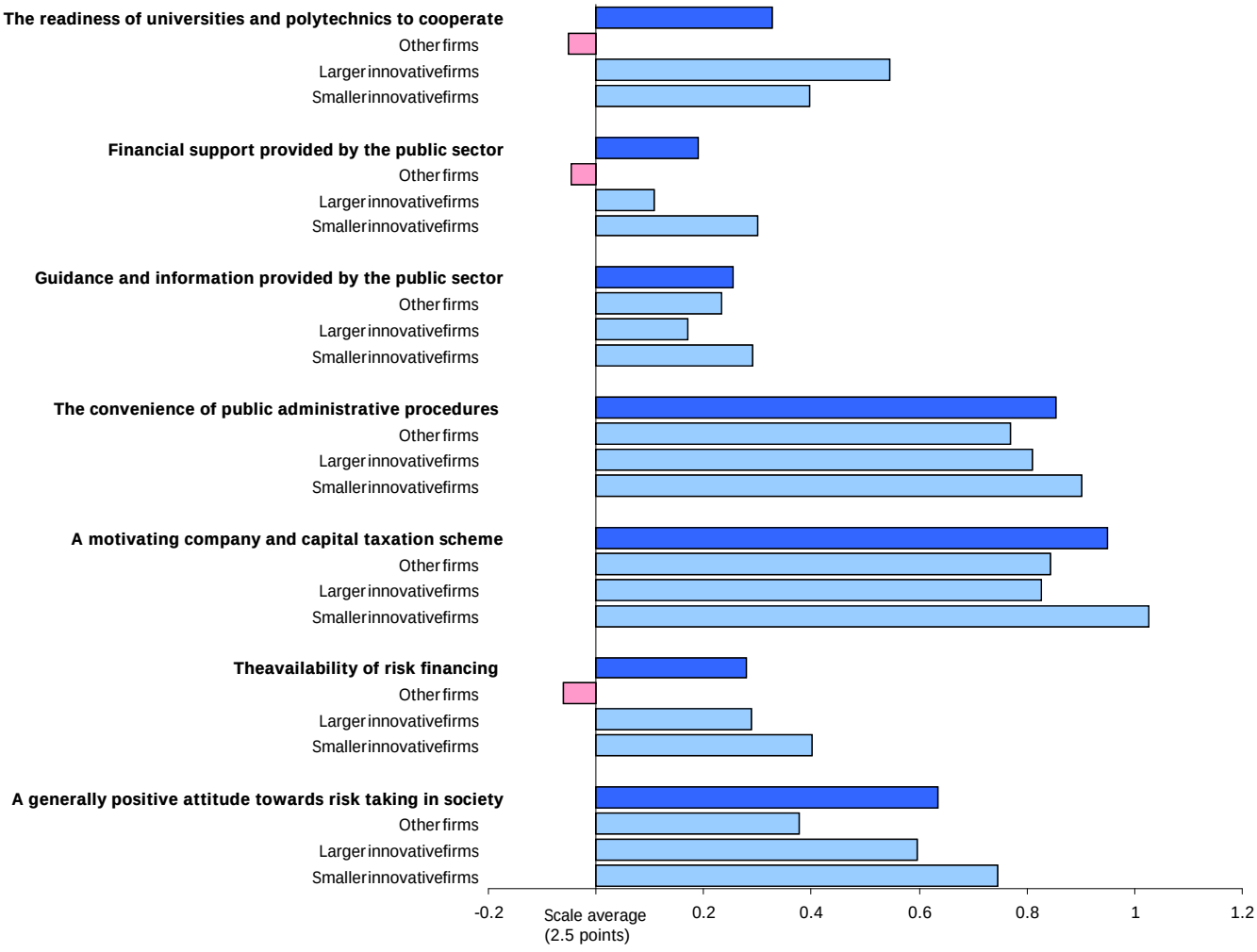


- Main supplier: Vendor of end product /service responsible for its design.
- System supplier: Provision of systems to main suppliers.
- Supplier: Provision of products/services to be part of the customers' offering.
- I don't know

2.3. Convenience of public administrative procedures and motivating tax schemes overshadow other public support functions in importance

Although answers differ only little across company categories they do so systematically. The impact of diverse public sector measures such as direct financial support, taxation, guidance and ease of administrative procedures is systematically perceived more central by small innovative companies than by their large counterparts. Less innovative firms asses the importance of the afore-mentioned aspects least relevant. The convenience of public administrative procedures and the existence of a motivating company and capital taxation scheme stood out above all other aspects across the different firm categories. The availability of risk financing was especially wished for by innovative companies. The graph illustrates deviations from the scale average (2.5 points).

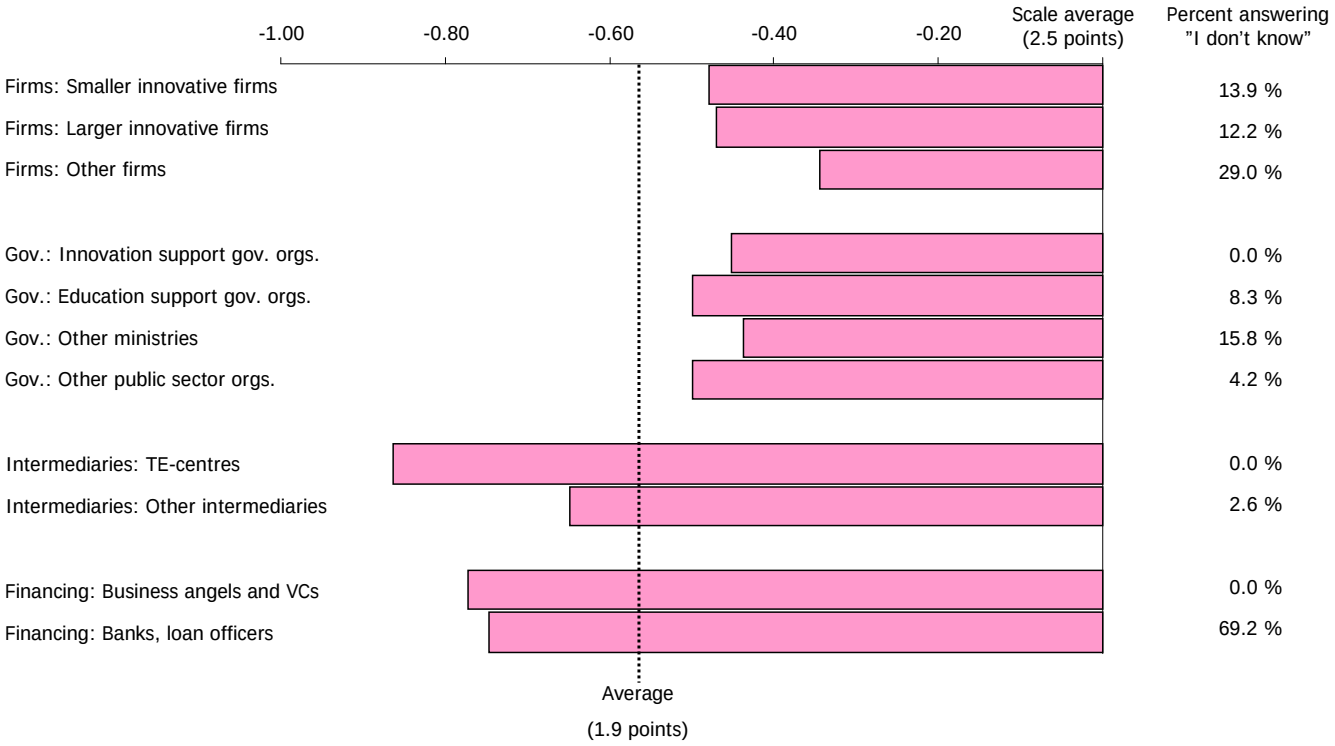
Q16: How important are the following aspects from the perspective of your operations?
(1=not at all important, 4= very important)



2.4. TE-centres most annoyed by complexity of the NIS

Perhaps surprisingly, the actors of the NIS evaluate the system just as complicated as the companies. The most negative attitude is displayed by the TE-centres, which give the grade “very complex” to the system from the perspective of the private business and innovation activities. The graph illustrates deviations from the scale average (2.5 points).

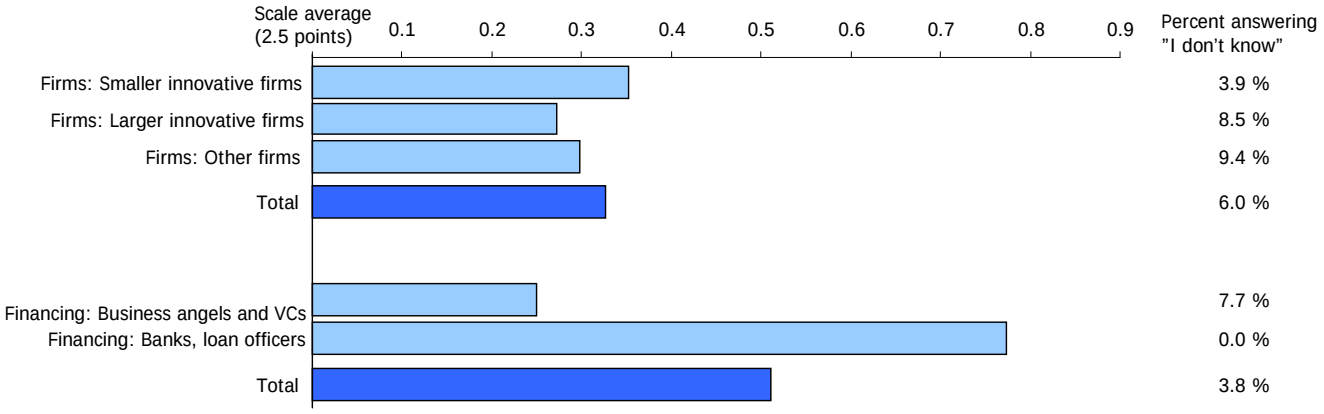
Q17: One of the most central functions of the system is to facilitate PRIVATE business and innovation activities. Against this backdrop, how would you characterize the innovation system as a whole?
(1=very complex, 4=very simple)



2.5. Companies across categories estimate tax incentive schemes efficient in generating new start-ups

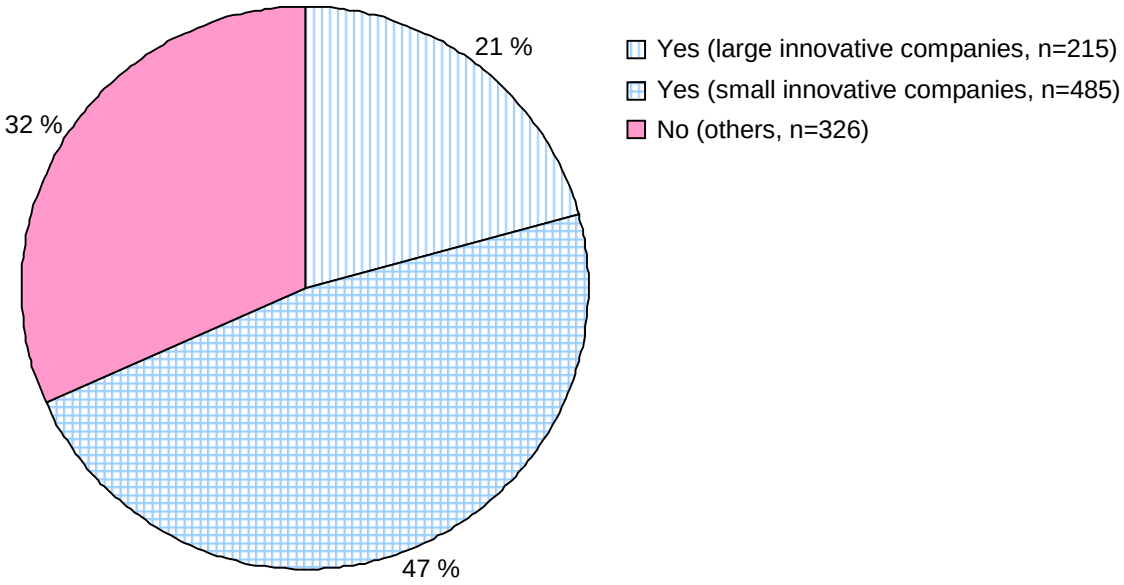
Favourable estimations of the efficiency of potential tax incentive schemes to spawn new growth companies uniformly over-weigh pessimistic ones across all three company categories. Aggregate positive estimations range from 57% to 64% depending on company type. Among firms, small innovative companies were most optimistic but still far behind the Banks' loan officers, of whom more than 60 percent see the tax incentives as a "very efficient" way of increasing the number of growth companies.

Q18: The emergence of new growth companies could be facilitated by providing them with tax incentives regarding their future earnings and profit sharing. How efficient are such tax incentives in increasing the number of growth companies?
(1=Not at all efficient, 4=Very efficient)



2.6. Two thirds of the respondents innovative companies

Q19: Has your company engaged in innovation activities in the last three years?



The following questions were only asked from those respondents, who answered "Yes" to question Q19.

2.7. Market forces overweigh public actors in impacting corporate R&D

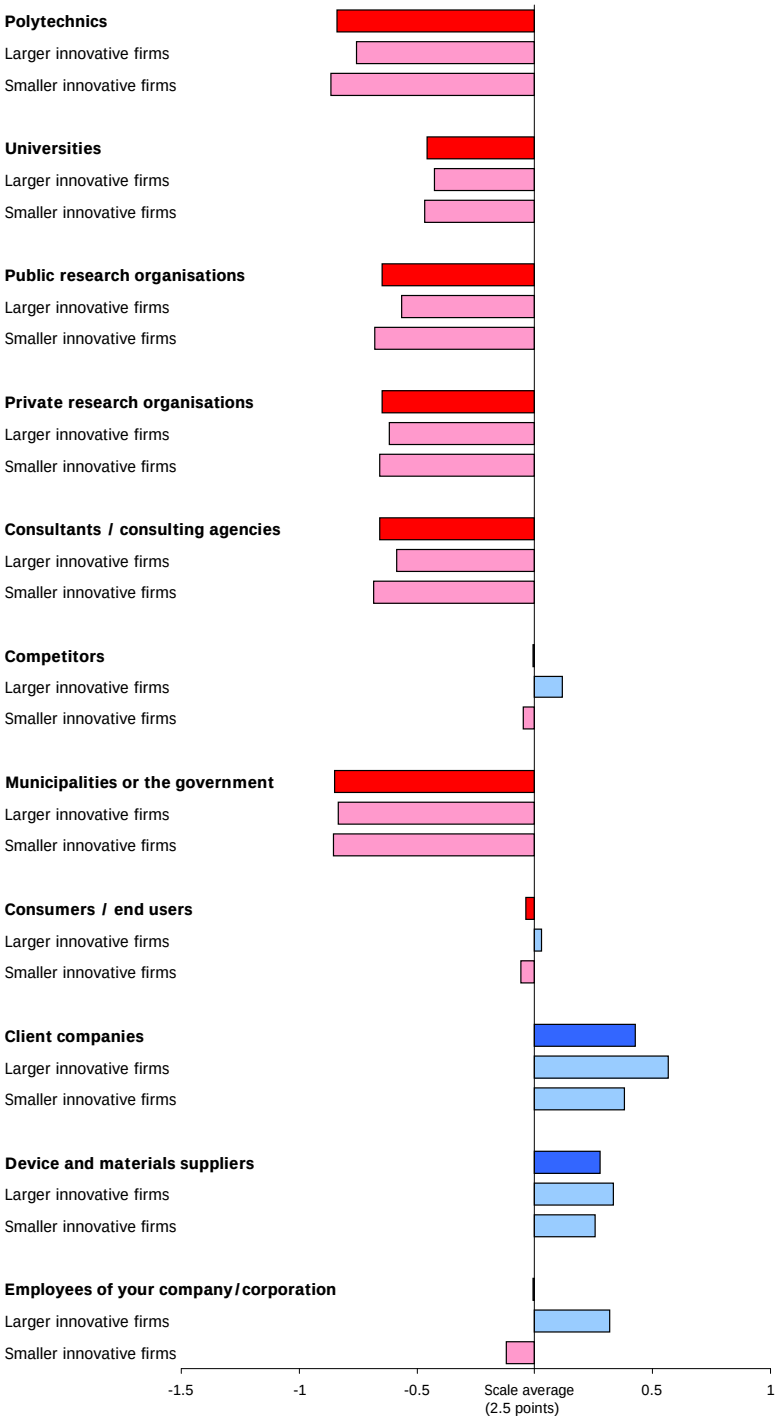
It is immediately evident that market related forces, namely b-2-b clients, suppliers, consumers, and competitors, have the most impact on companies' innovation activities across both categories of innovative companies with the larger ones assessing the impact to be slightly stronger. Other private and all public actors listed in the survey were not assigned nearly as much importance. Universities constitute an unsurprising exception, as university interaction has traditionally been a stronghold of Finnish innovation activity. Client companies represent the most important external source of impact, while the employees of the own organization were clearly assessed the most important asset for innovation activities overall.

Q20: How important are the following DOMESTIC actors from the perspective of your company's innovation activities?
(Scale: 1=not at all important, 4= very important)

2.8. Foreign actors influence corporate innovation activities to a lesser extent than domestic ones

As in the case of domestic actors also foreign actors impacting corporate innovation activities of Finnish companies are dominated by market players rather than public actors. B-2-b clients, suppliers, consumers, and competitors have the most impact on companies' innovation activities across both categories of innovative companies with the larger ones assessing the impact to be slightly stronger. Other private and all public actors listed in the survey were not assigned nearly as much importance. Surprisingly, employees of the own organization received relatively low scores in importance. On the other hand it has to be pointed out that even the most influential foreign actors received only mediocre scores when compared to the respective domestic ones.

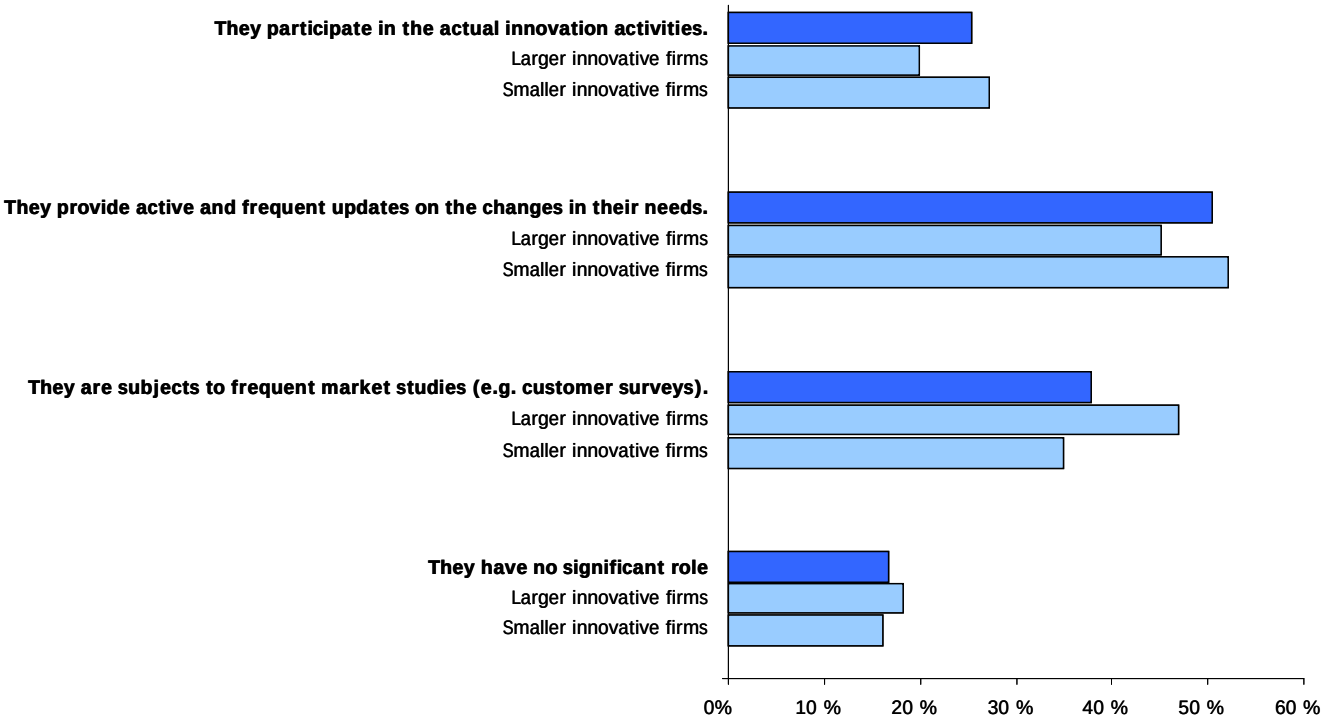
Q21: How important are the following FOREIGN actors from the perspective of your company's innovation activities?
(Scale: 1=not at all important, 4= very important)



2.9. End users claim more active role in innovation activities of small companies

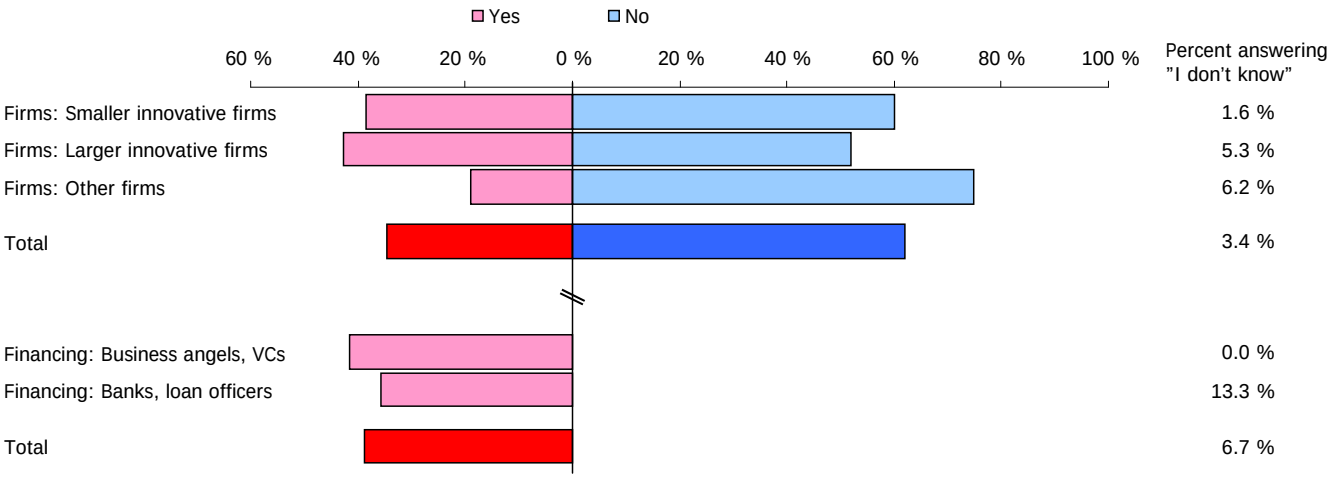
Active participation of the end user in the forms of direct engagement in the innovation activities themselves or providing frequent updates in changes of needs is relatively more popular among small than large innovative companies with updates being preferred over direct participation. Large companies, in turn, favour more indirect methods of integrating the end user, and subject them to market studies, for example.

Q22: Which of the following statements portray the role of end users in your innovation activities?
(Percentage answering "yes")



2.10. Innovative firms have fallen victim to the financial crisis more often

Q23: To companies: **Has any of your company's investment-, R&D-, marketing-, or any other type of project been deferred or cancelled due to the global financial crisis?**
To financers (**Q18**): **How many of the companies you are funding have had to defer or cancel an investment-, R&D-, marketing-, or any other type of project due to the global financial crisis?**



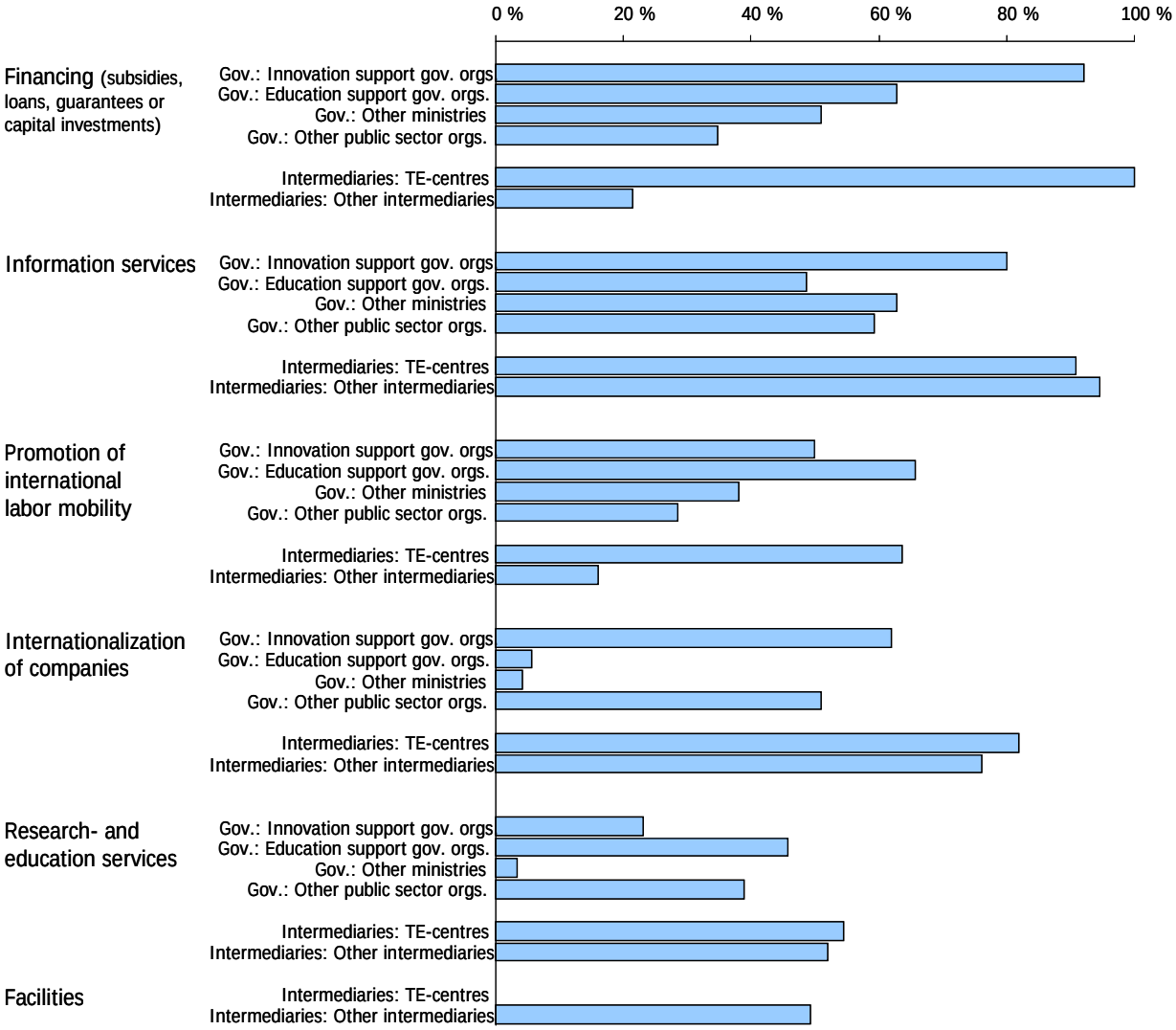
3. Additional questions posed to PUBLIC ACTORS and INTERMEDIARIES

This section presents the results of two respondent categories, as public actors and intermediaries answered to several shared questions.

3.1. Public innovation support organizations cover most services, while research- & education services lack providers

Question 14 reveals that especially the two central innovation support organizations, Tekes and TEM, as well as the TE-centres provide a plethora of services to other actors of the NIS. They cover services in the areas of financing, information provision, and internationalization. While these services are covered quite well, services related to research- and education clearly seem to lack providers.

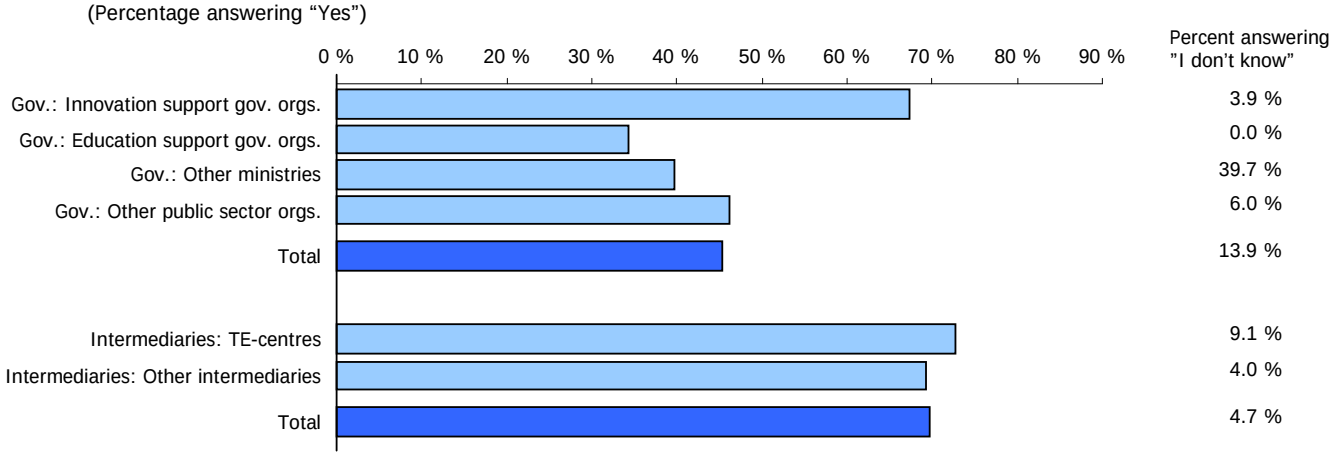
Q14: Which of the following services does your ORGANIZATION provide to other actors of the Finnish national innovation system?
(Percentage answering "yes")



3.2. Considerable overlap in the provision of services among public actors of the NIS

In line with the findings reported in conjunction with question 14, there seems to be quite some overlap in the provision of different services among different public institutions of the NIS. Least overlap has been identified in the area of education support services.

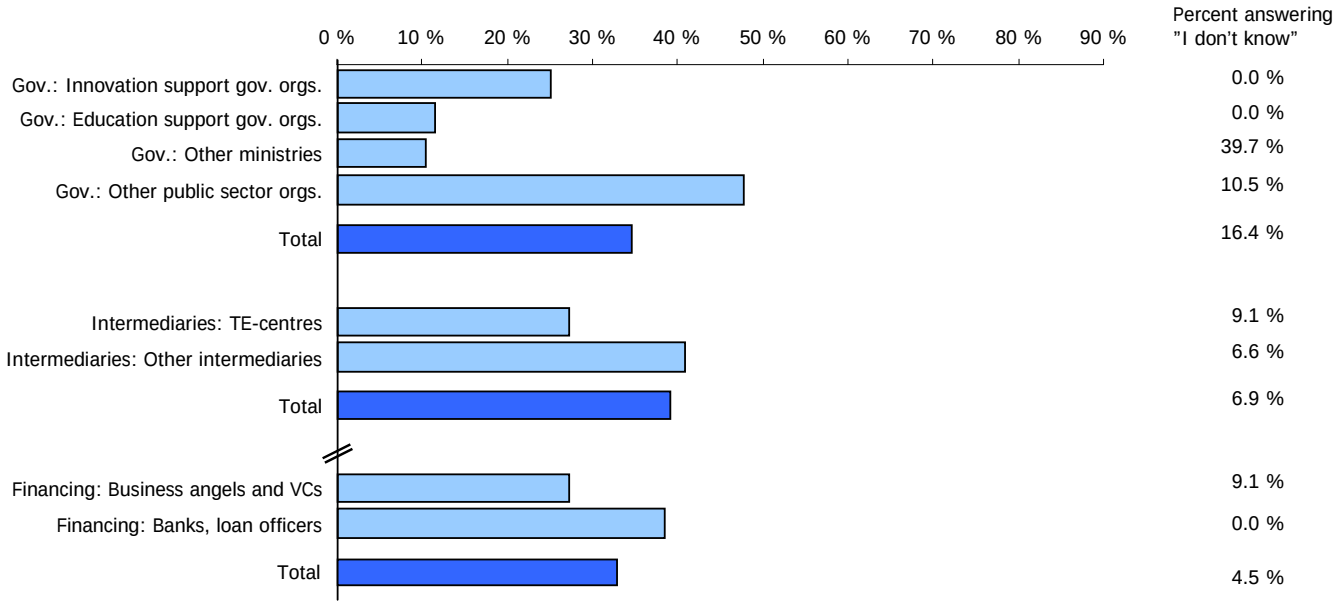
Q15: Would you say that other PUBLIC actors provide similar services than your organization?
(Percentage answering "Yes")



3.3. Overlap between public and private actors less severe

Overlap with services provided by private actors in the NIS seems to be rather small among public innovation support organizations, education support organizations and ministries. Still, overlap with private sectors actors is strong among other public sector organizations. The private financing sector shares this view, as one third of respondents see, that the public sector provides similar services as their organization.

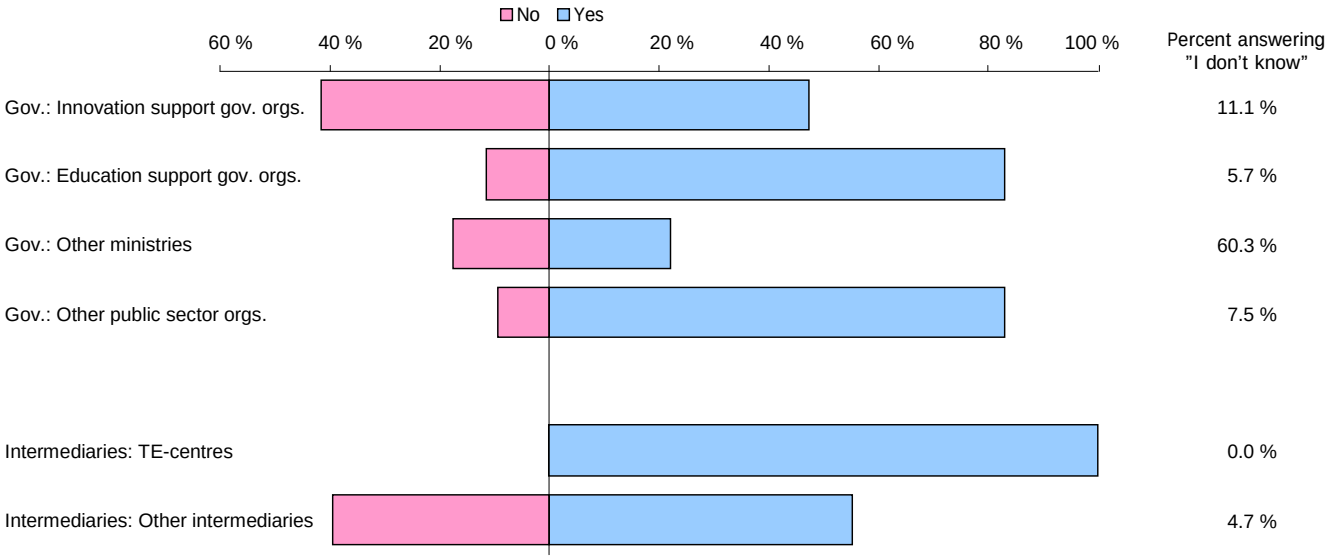
Q16: To public actors & intermediaries: **Would you say that other PRIVATE actors provide similar services than your organization?** (Percentage answering "Yes")
To financiers (**Q5**): **Would you say that PUBLIC actors provide similar services than your organization?**
(Percentage answering "Yes")



3.4. Co-operation among service providers fairly smooth

Most public service providers assess co-operation between each other to be rather effortless. TE-centres seem to have had the best experiences with education support organizations and other public sector institutions trailing closely behind. Innovation support organizations and institutions belonging to the category “other intermediaries” are relatively more pessimistic.

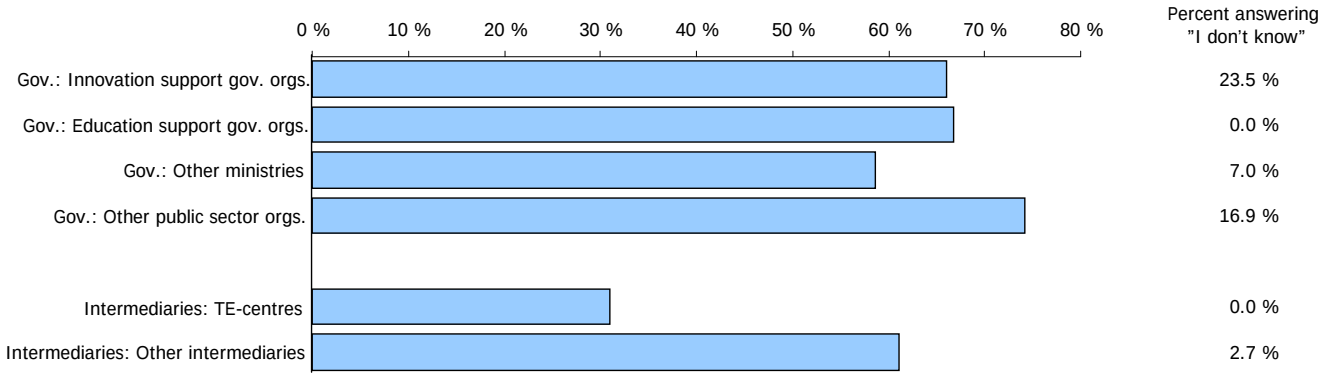
Q17: Would you say that the co-operation between service providers is effortless?



3.5. University degrees rather popular among personnel of public NIS actors

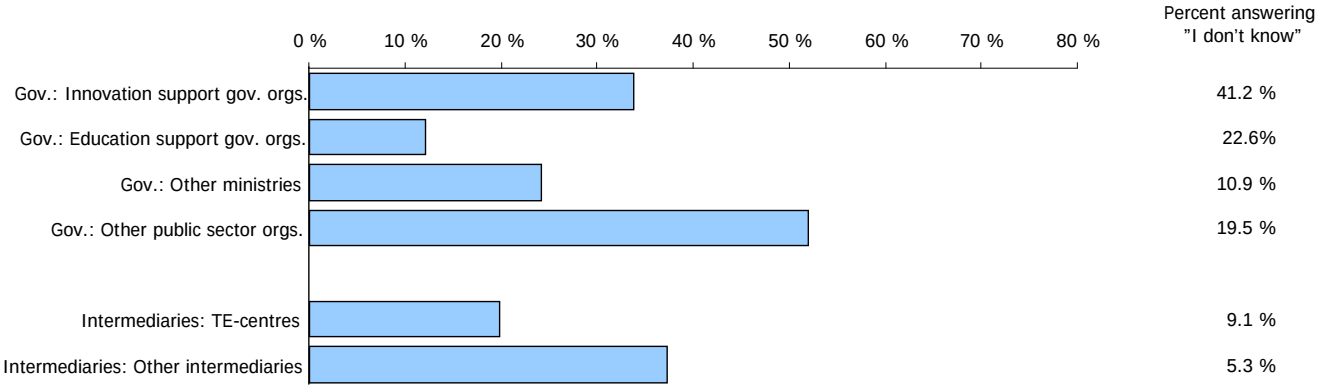
About half of all personnel at innovation support organizations having a university degree have a technical background. This is true for personnel at institutions belonging to the category “other public sector organizations” to an even larger extent where about ¾ of highly educated personnel has a degree from a technical university.

Q23: What is the share of your DOMESTIC personnel having a UNIVERSITY degree?



3.6. Technically educated personnel in high demand at innovation support organizations

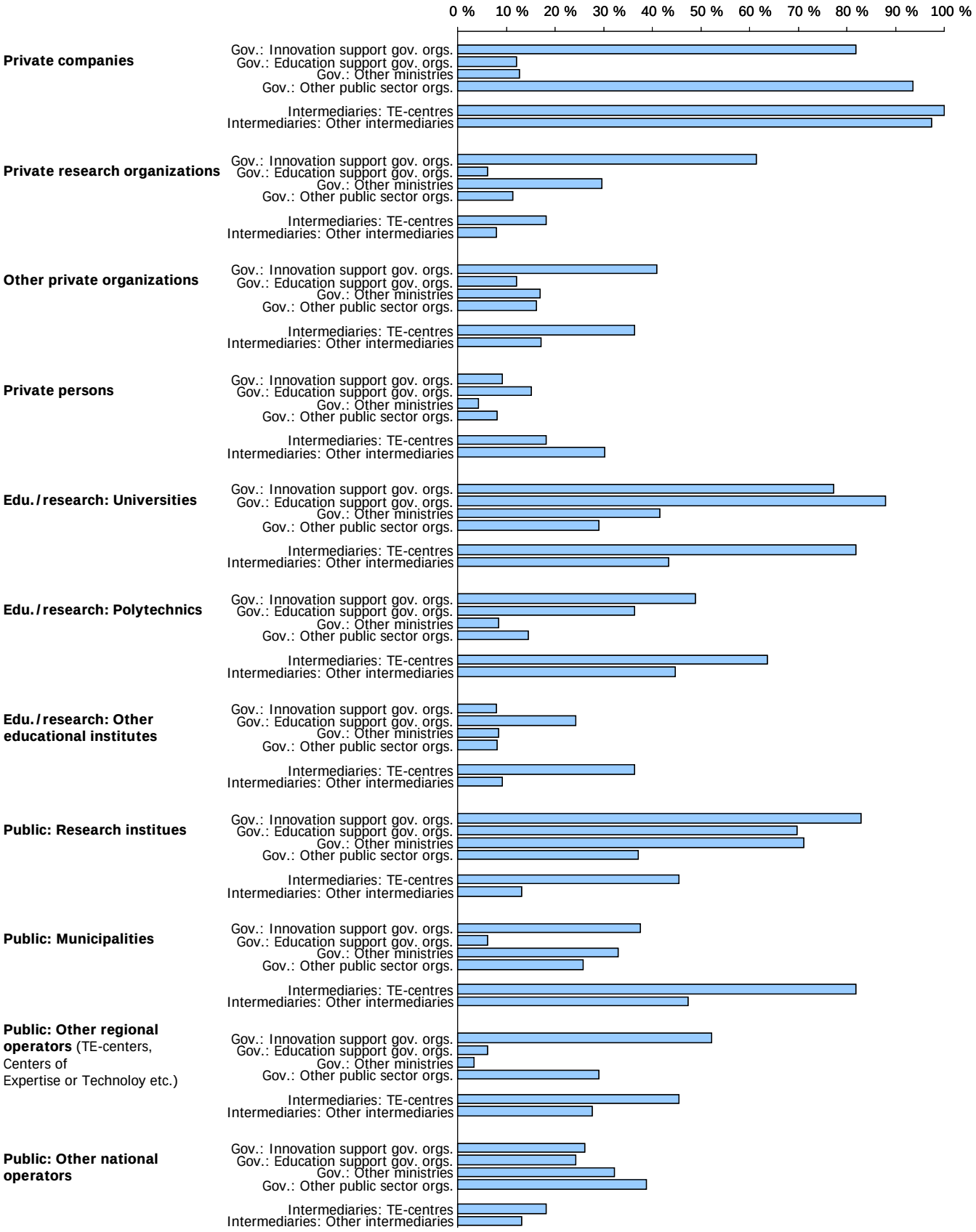
Q24: What is the share of your DOMESTIC personnel having TECHNICAL UNIVERSITY degree?



3.7. Funding provided by public actors of the NIS in line with their respective missions

When questioned for the primary recipients of their funding, the responses of public actors were very much in line with their respective missions. Innovation support organizations provide most of their funding to private companies and research organizations, universities and public research institutes, and regional operators. Education support organizations fund mainly universities, polytechnics, and public research institutes. TE-centres, having a regional mission, support private companies, universities, polytechnics, and municipalities and their co-operation. Actors in the category “other public sector organizations” are mainly there for supporting private companies.

Q25: Who are the primary users of your services or financing? (Percentage answering "Yes")



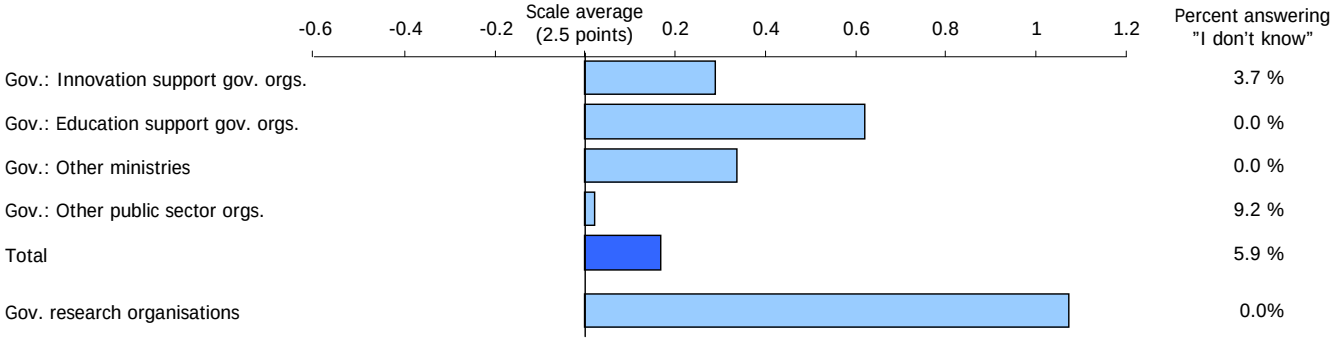
Question *Q26 has been covered in conjunction with companies, see section 3.4.*

3.8. Public research organizations receive relatively good grades for providing information

The following three graphs summarize the results of questions *Q27-Q29* posed to public actors and questions *Q17-Q19* asked from research organizations.

Public research organizations, on average, are assessed to respond well (grade 2.7 on a scale from 1 to 4) to the information needs of public actors of the NIS. All respondents graded the responsiveness above scale average. The governmental research institutes themselves give a notably higher grade (3.6 on a scale from 1 to 4), since more than 50 percent of the public research organization respondents evaluate, that they respond "very well" to the needs of their parent ministries.

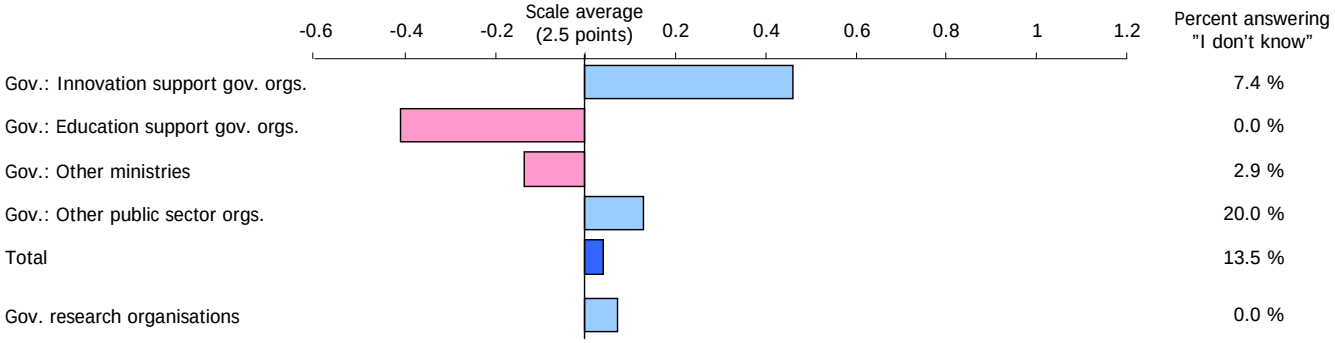
Q27: To public actors: **How well do GOVERNMENTAL research organizations match the information needs of your organization?** (1=not at all, 4=very well)
To public research organizations (**Q17**): **In your opinion, how well does your organization as a governmental research organization respond to the information needs of your parent ministry?**
(1=not at all, 4=very well)



3.9. Private research organizations receive relatively lower grades for providing information

Especially education support organizations have a rather pessimistic picture of the responsiveness of private research organizations to their information needs. Also other ministries gave a below scale average response. Innovation support organizations, on the other hand, provide a rather positive assessment, which might be related to possible funding based ties between these organizations and the private research institutes. The public research institutes grant nearly the same grade to the private research institutes in serving their parent ministries as the public actor on average.

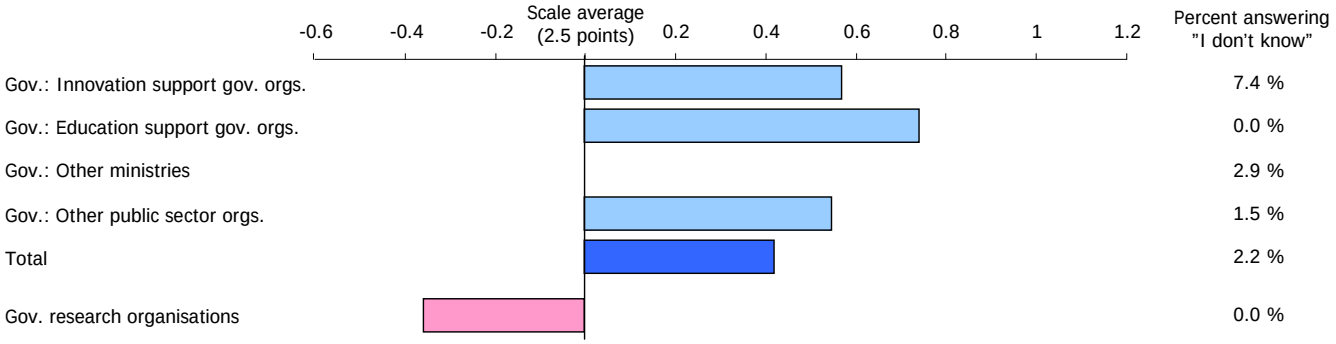
Q28: To public actors: **How well do PRIVATE research organizations match the information needs of your organization?**
(1=not at all, 4=very well)
To public research organizations (**Q18**): **In your opinion, how well do private research organizations match the information needs of your parent ministry?**
(1=not at all, 4=very well)



3.10. Universities and polytechnics receive best grades for responsiveness to information needs of the public actors

Whereas the opinions of public actors and public research organizations concerning the private research organizations abilities to serve the public actors seem to unite, are there great differences when it comes to the abilities of universities and polytechnics. The public actors consider the universities and polytechnics responding on average “somewhat well” (grade 3 on a scale from 1 to 4) to the information needs of their organizations, whereas the public research organisations grant only the grade 2.1, which stands for “not very well”. All in all, the public actors in general grade the universities and polytechnics as the relatively most successful in providing the needed information, while the public research organisations rate the educational institutes notably below private- and public research institutes.

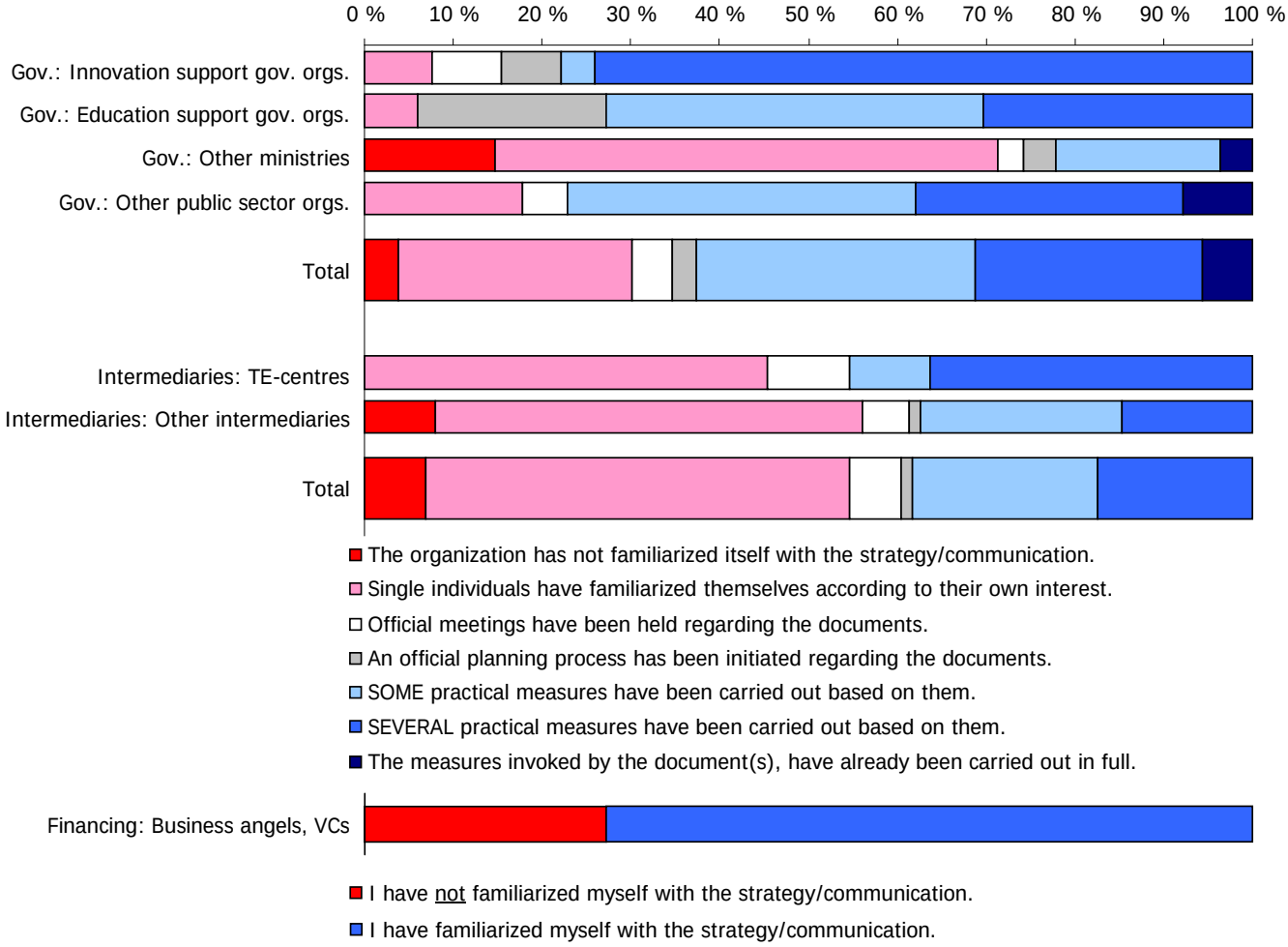
Q29: To public actors: **How well do UNIVERSITIES AND POLYTECHNICS match the information needs of your organization?**
(1=not at all, 4=very well)
To public research organizations (**Q19**): **In your opinion, how well do universities and polytechnics match the information needs of your parent ministry?**
(1=not at all, 4=very well)



3.11. Most public actors have taken action to incorporate the implications of the national innovation strategy into their agendas

With the exception of most ministries public actors have taken action to heed the implications emerging from the freshly published national innovation strategy. While a good half of intermediaries are still in the process of familiarizing themselves with the strategy documents, ministries belonging to the category “other ministries” are clearly the least prepared.

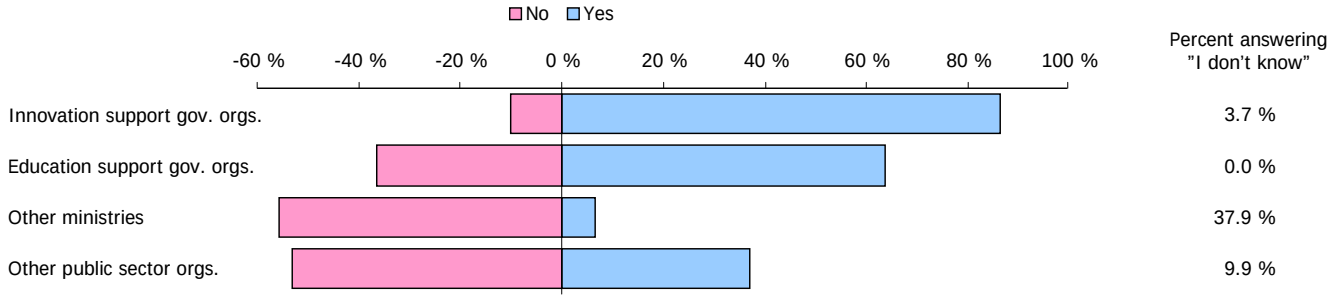
Q30: The new national innovation strategy was published in July 2008 and the respective government communication was handed to the parliament in October 2008. How has your organization reacted to these documents?



3.12. Innovation and education support organizations have identified need for change in wake of innovation strategy

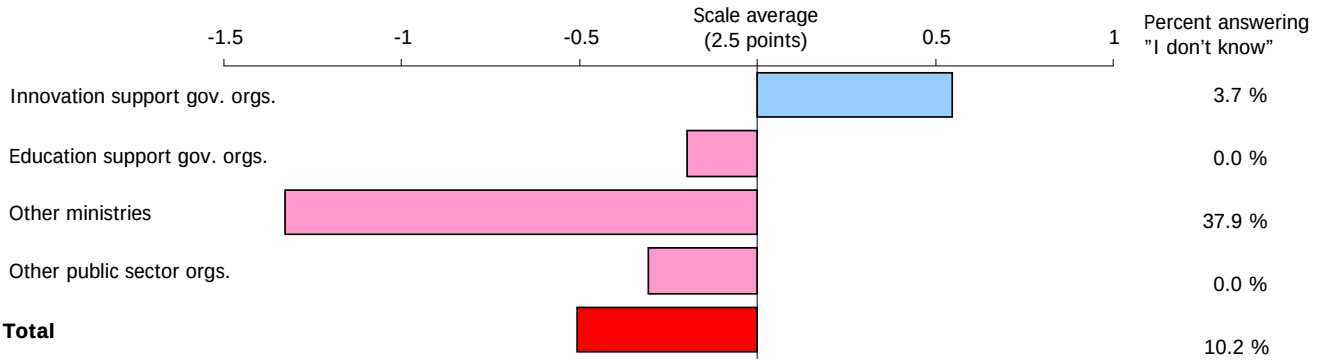
Tekes, TEM, OPM, and AKA have clearly identified requirements for change in their activities regarding the implications of the national innovation strategy. Other ministries and public actors are more inclined to state the strategy has no impact on their activities.

Q31: In your opinion, does the strategy/communication require changes in the activities of your organization?



3.13. Strategy receives relatively low grades on how much it has helped in steering activities

Q32: How much has the strategy/communication helped in steering the activities of your organization?
(1= not at all, 4=very much)



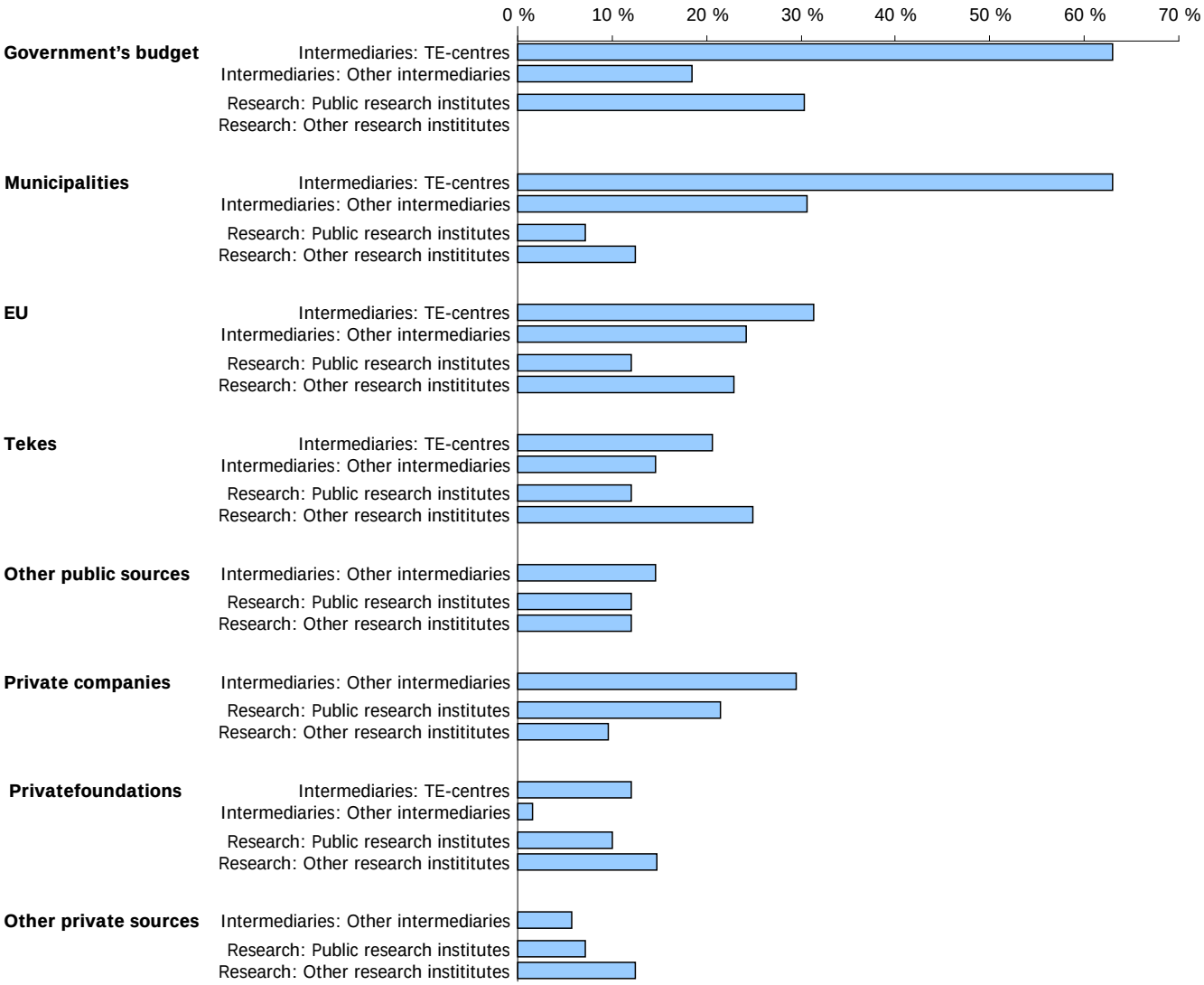
Results to questions 33-36 omitted due to their qualitative nature.

4. Additional questions posed to RESEARCH ORGANIZATIONS

4.1. Public funding the most important funding source

Question 14 mapped the financing sources of research institutes and intermediaries. For the intermediaries the government and municipalities are important sources of funding, whereas non-public research institutes get most of their funding from Tekes and the EU. The same question was also posed to the intermediaries (Q 27).

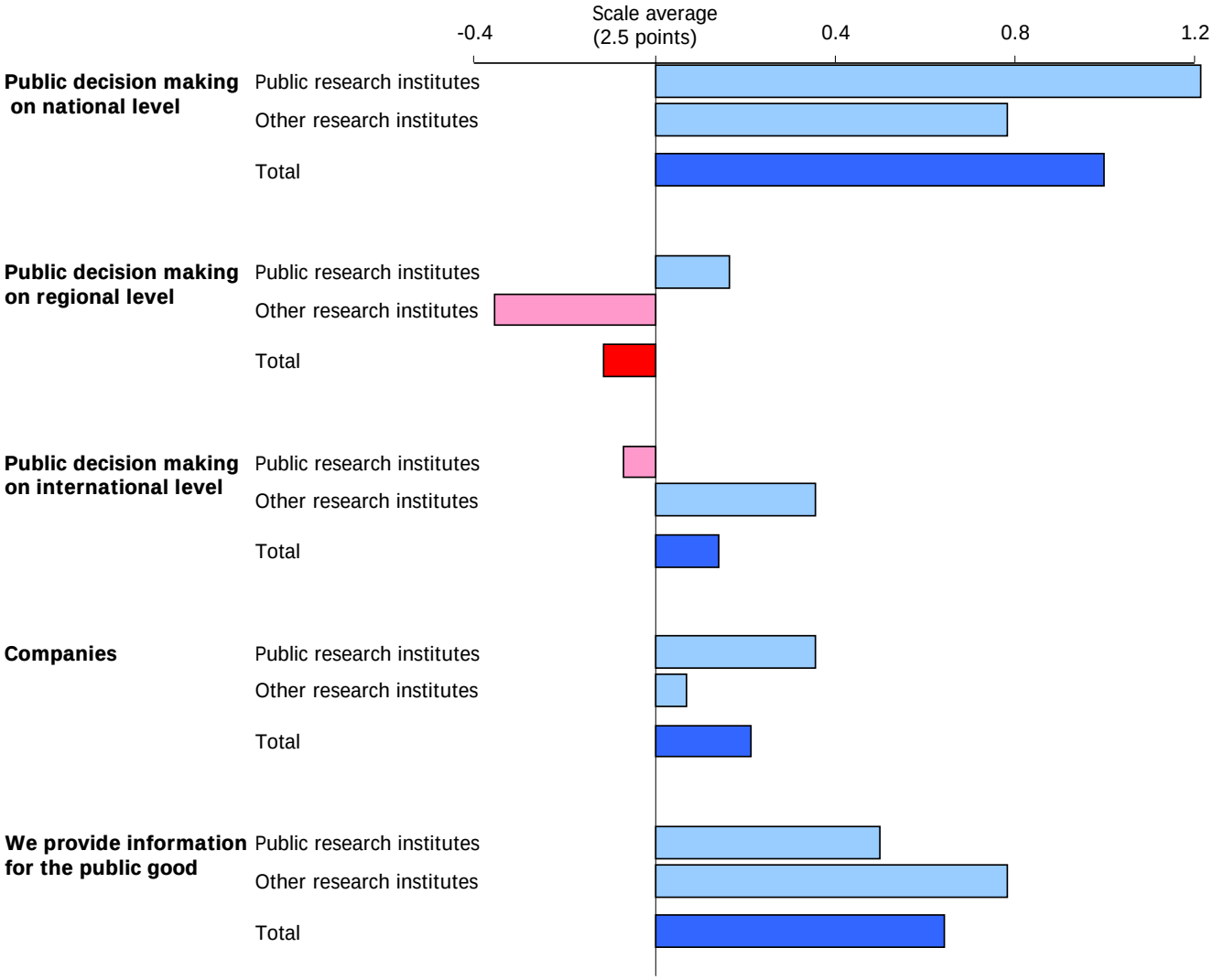
Q14: What are your sources of funding? If your funding structure varies from year to year, please answer using the average of the last three years.



4.2. Public decision making and information for the public good research institutes' the most important instances for research institutes

In question 15 the research institutes were asked to evaluate, to which extent they serve the named instances on a scale from "not at all" (=1 points) to "very much" (=4 points). The most important instances are public decision making on national level and providing information for the public good. The graph illustrates the deviation from the grading scale average 2.5 points.

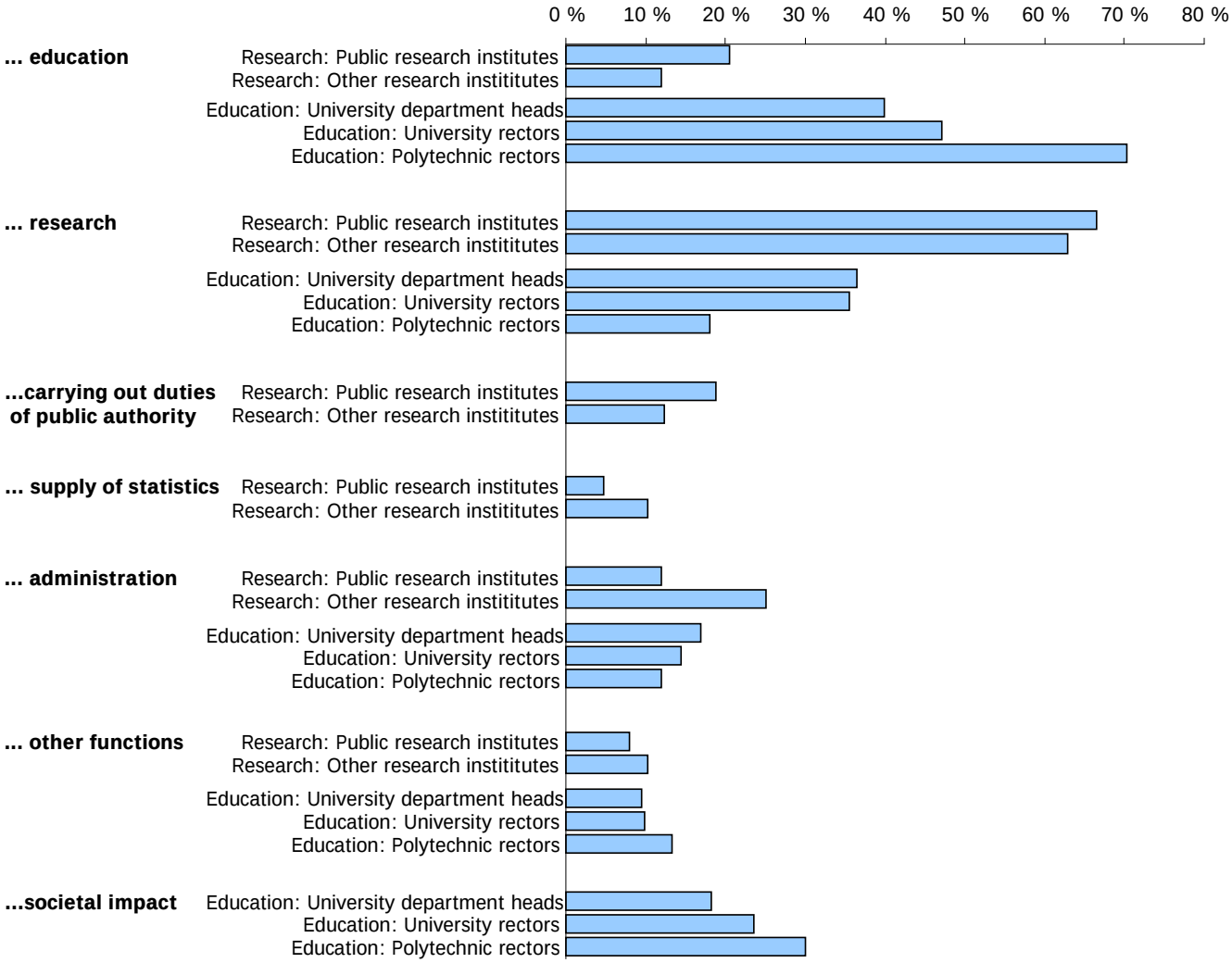
Q15: To what extent does your research serve the following instances?
(1=not at all, 4=very much)



4.3. Most of the labour input allocated to research and education

In question 16 the research institutes and educational institutes evaluated their allocation of labour input. The results are mostly self-evident; polytechnics focus mainly on education, whereas in universities the labour input between research and education is rather balanced. The group allocating the most labour input to societal impact is, perhaps surprisingly, the polytechnics.

Q16: How large is the share of your organisation's labour input that has been allocated to...



Questions Q17-Q19 concerning the public research organizations are reported in conjunction with the public actors in sections 3.8-3.10.

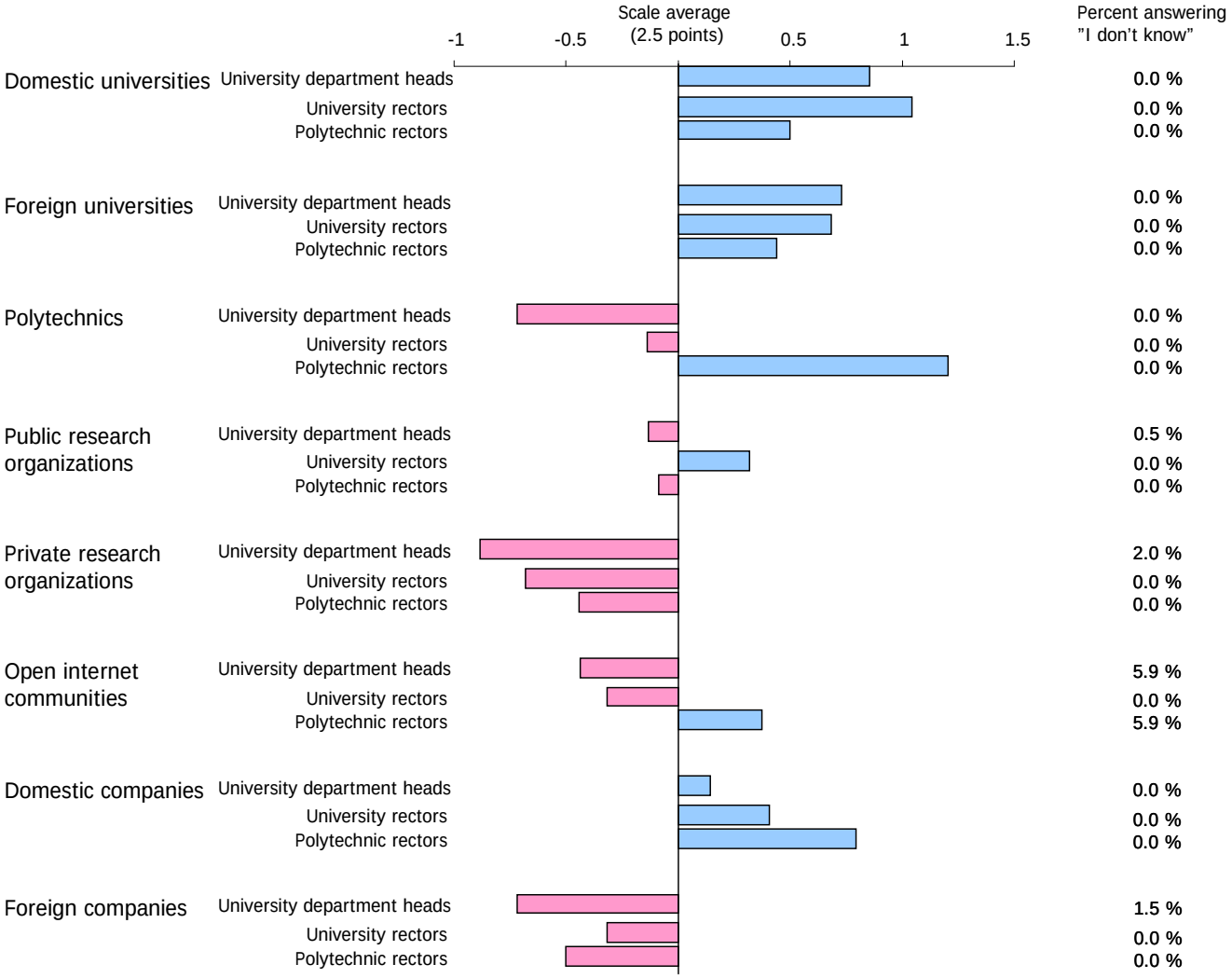
5. Additional questions posed to UNIVERSITY and POLYTECHNIC RECTORS and UNIVERSITY DEPARTMENT HEADS

Results to question 14 are reported in conjunction with those for research organizations (Q16) in section 4.3.

5.1. Universities most significant and private research organizations least significant partners in cooperation

Unsurprisingly the educational sector regarded universities in Finland and abroad the most significant partners in cooperative projects. Domestic companies received also rather positive grades, especially from rectors at polytechnics. All other actors received only below scale average grades with private research organizations performing least well. Respondents were asked to rate the given options on a scale from 1 (not at all important) to 4 (very important). The figure below displays answers as point deviations from the scale average (2.5).

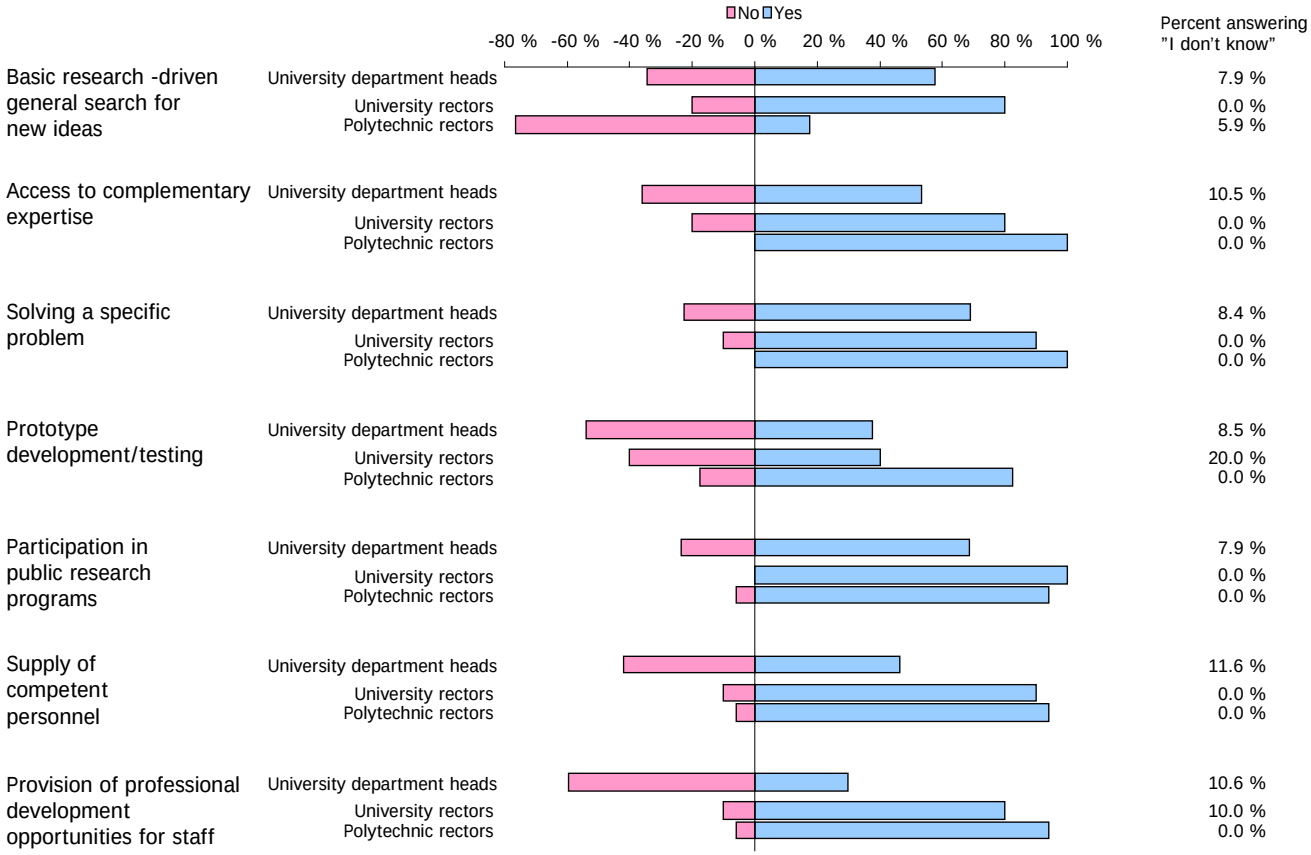
Q15: How significant was the role of the following actors in cooperative projects of your department in the last three years?
(1=None, 4=Very large)



5.2. University department heads least convinced of benefits emerging from cooperation with companies

When asking university *department heads*, universities seem to engage in cooperative projects with corporate entities mainly for solving specific technology related problems and for being able to participate in public research programs. Prototype development and testing as well as the provision of professional development opportunities for their staff are the least valued benefits of such cooperation. University *rectors* assess the benefits to be much broader in scope. Not only does a relatively greater share of rectors point out the same benefits as did the department heads, but they add the search for new ideas in basic research, access to complementary expertise, supply of competent personnel and the provision of personnel development opportunities to the list of identified objectives of cooperation. Finally, with the exception of the search for new ideas in basic research, polytechnic rectors seem to emphasize all the objective options provided in the survey as important.

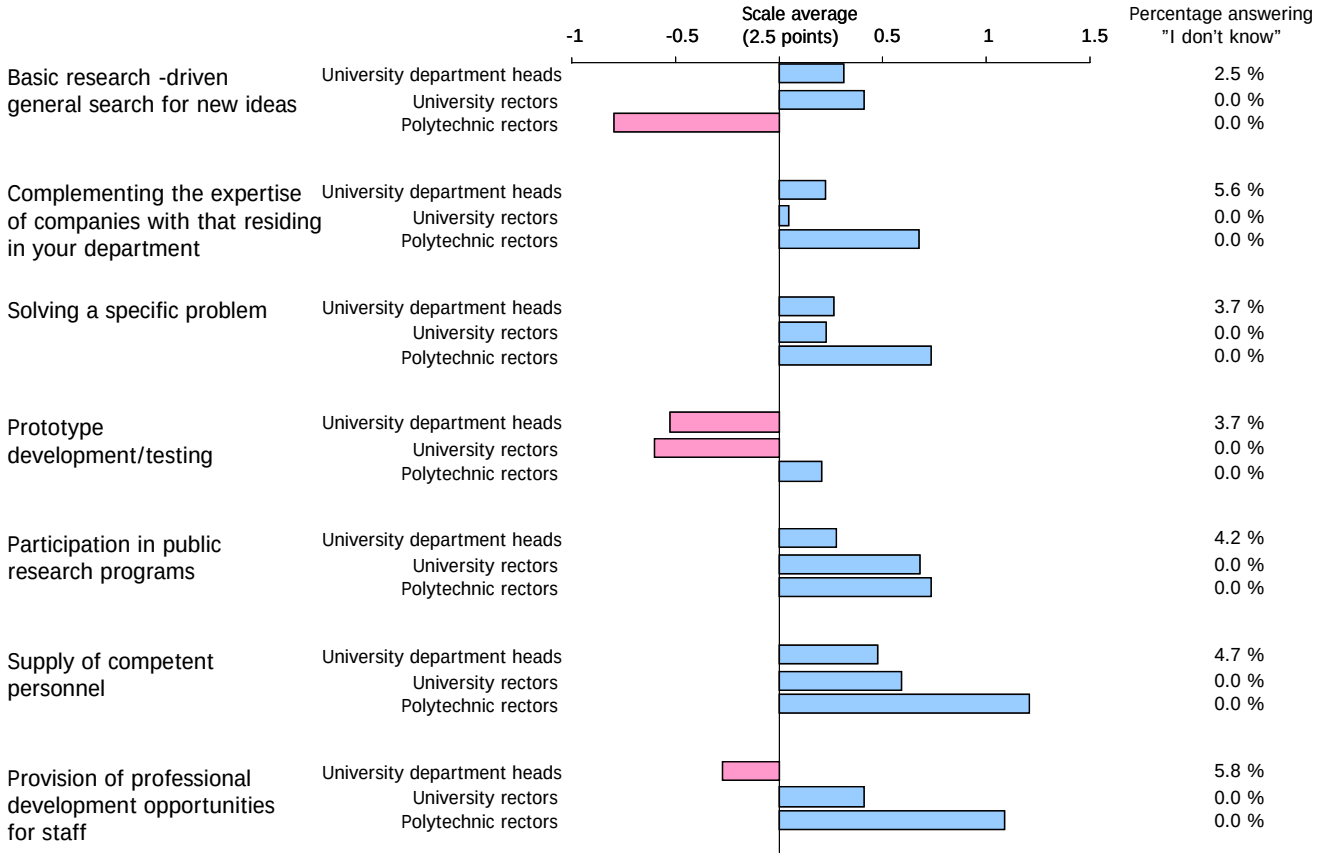
Q16: Have joint projects with companies addressed the following research objectives of your department?



5.3. Meeting corporate needs

University department heads assess that, out of the given options, universities are best in meeting corporate needs by providing them with competent personnel. Almost all other options receive above scale average grades, too, with the exception of prototype development and provision of personnel development opportunities. University rectors trail the answers of department heads to a fairly large extent with significant deviations in opinions arising regarding the provision of complementary expertise to companies and the provision of personnel development opportunities to companies only. Again, polytechnic rectors emphasize the benefits more than universities. Respondents were asked to rate the given options on a scale from 1 (not at all important) to 4 (very important). The figure below displays answers as point deviations from the scale average (2.5).

Q17: According to your own ESTIMATE, to what extent does your department answer to the following needs of CORPORATE innovation activities?
(1=Not at all, 4=To a very large extent)

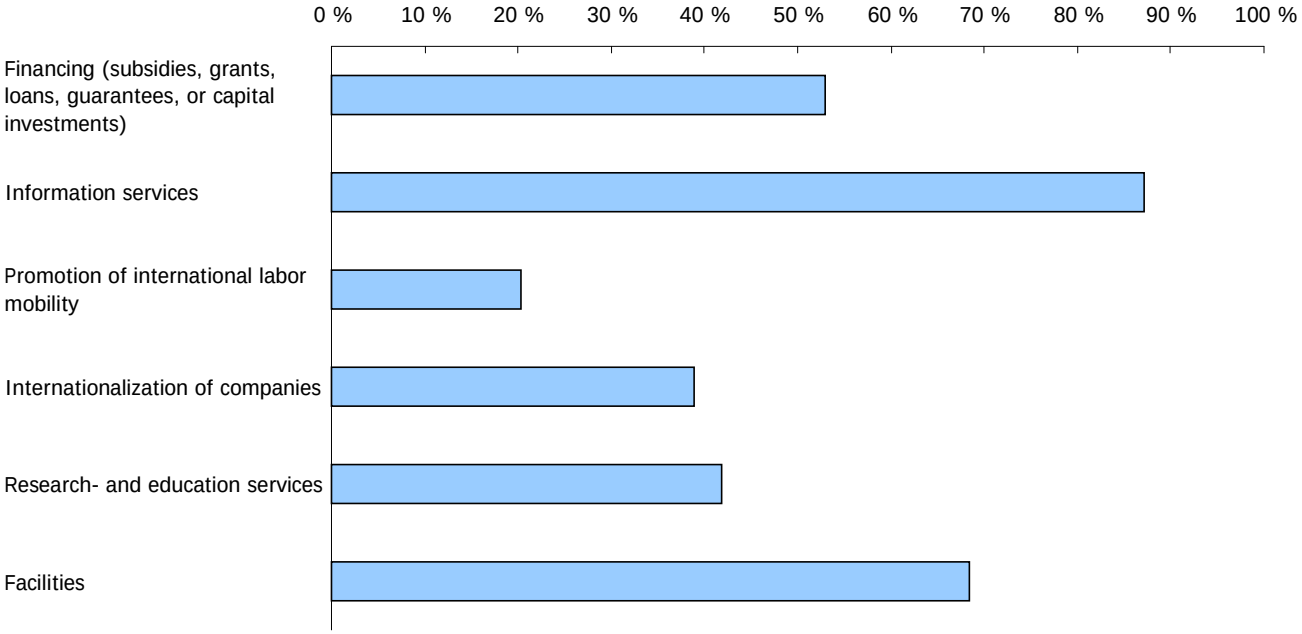


6. Additional questions posed to MUNICIPALITIES

6.1. Financing, facilities and information services favoured innovation support services of municipalities

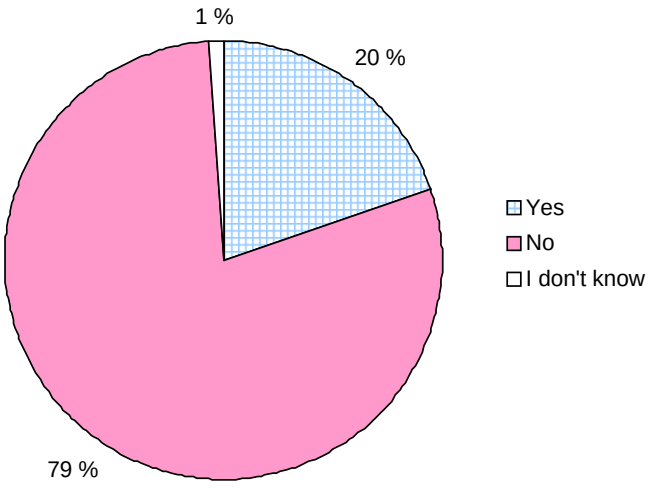
The figure below reveals that municipalities clearly concentrate on providing innovation support services that strengthen the local infrastructure (financing, facilities and information services). Services that support internationalization of activities play a less significant role.

Q14: Does your municipality provide any of the following services in order to support your local INNOVATION ACTIVITIES?



6.2. Municipalities not strategically geared towards cultivating local innovation activities

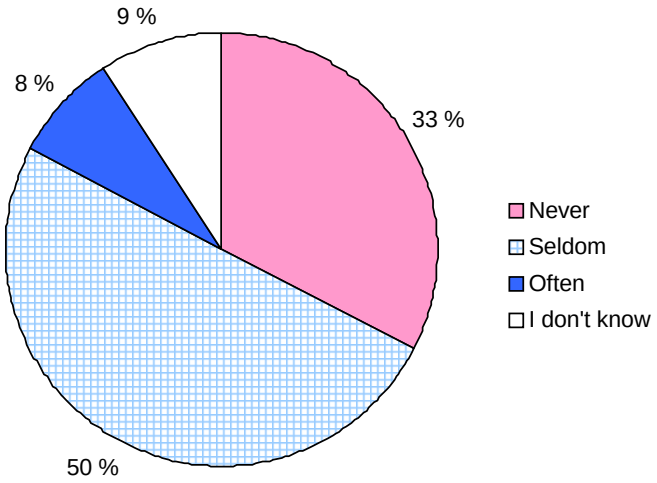
Q15: Does your municipality have an explicit strategy or agenda related to INNOVATION ACTIVITIES?



Results to questions 16-18 omitted due to low quality of data.

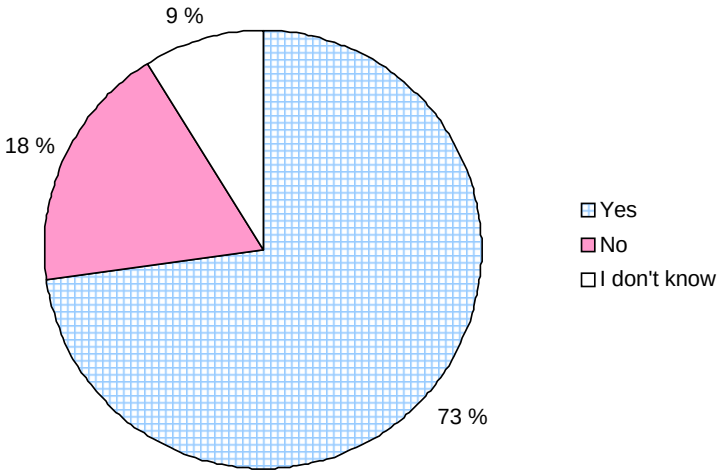
6.3. Lack of innovation support strategies apparent in municipal procurement choices

Q19: Has innovativeness been a central criterion in the selection of service providers or goods suppliers in your municipality?



6.4. Municipalities convinced of the potential impact of strategic procurement choices on the furtherance of local innovation activities

Q20: Would you say it is possible to support the promotion of innovation activities through public procurement?



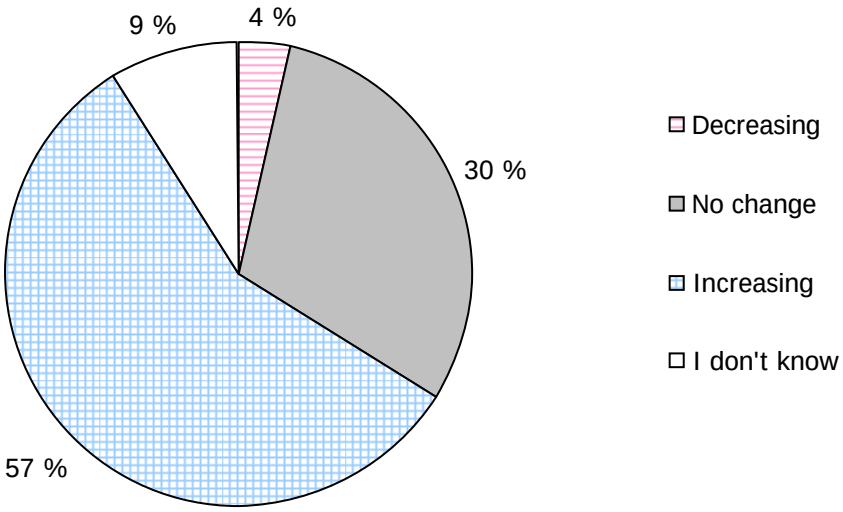
Despite not applying a strategic approach to procurement that would support local innovation activities (see Q19 and Q20) municipalities believe in its potential impact.

7. Additional questions posed to FOUNDATIONS

7.1. Most foundations convinced of their increasing importance as part of the NIS

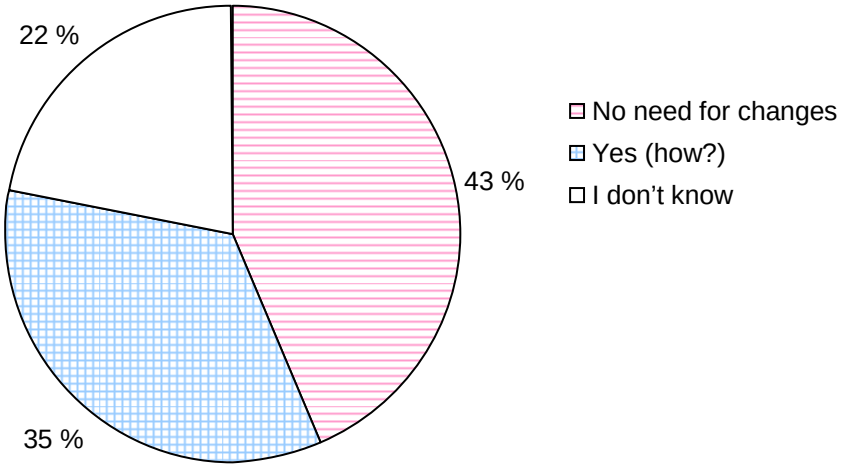
Almost 60% of foundations think that the role of foundations in the NIS is increasing in the future. A third of foundations think there will be no change in impact.

Q5: How would you assess the development of the importance of foundations in the Finnish innovation system in the next five years?



7.2. Mixed feelings on the restrictiveness of legislation and its impact on support possibilities of foundations

Q6: Should the legislation regarding foundations be reformed to improve foundations' possibilities to support science, arts, and research?

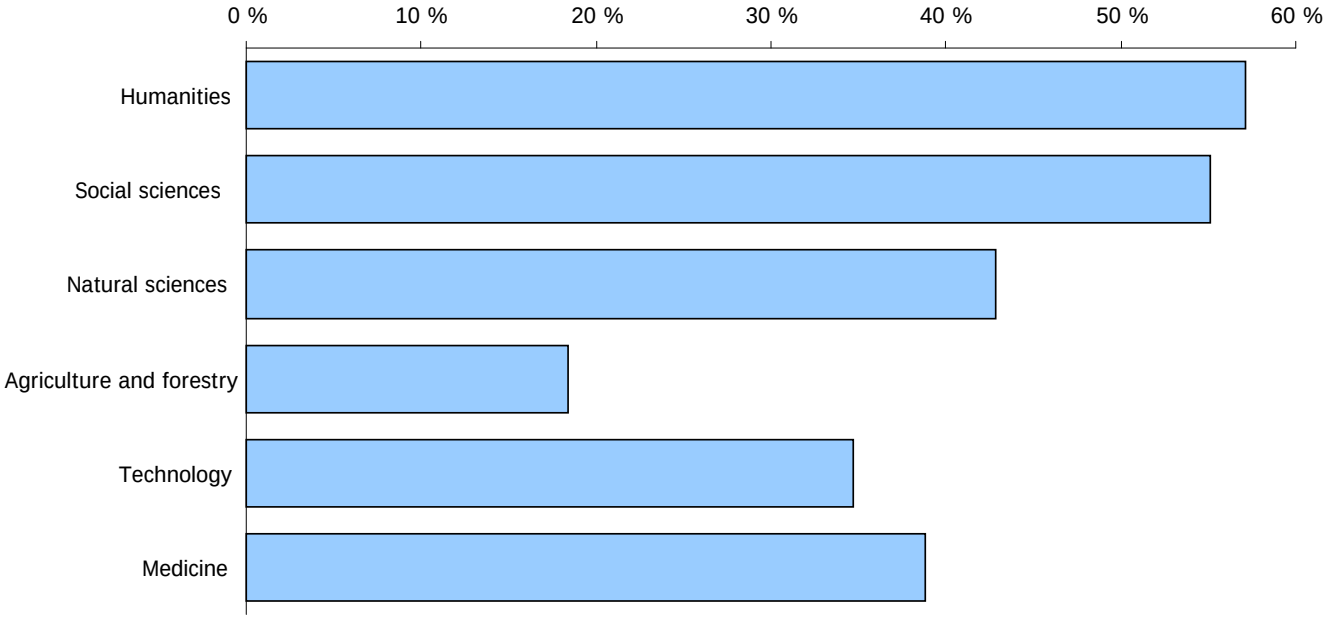


The respondents chose one of the above options. In addition, in the YES -option respondents were presented with the possibility to input an open answer.

7.3. Humanities and social sciences receive most of support from foundations

From the perspective of the innovation system it is interesting that fields associated most closely with innovation (e.g. technology, and natural sciences) pale in the share of support received from foundations when compared to fields that are usually not associated with innovation.

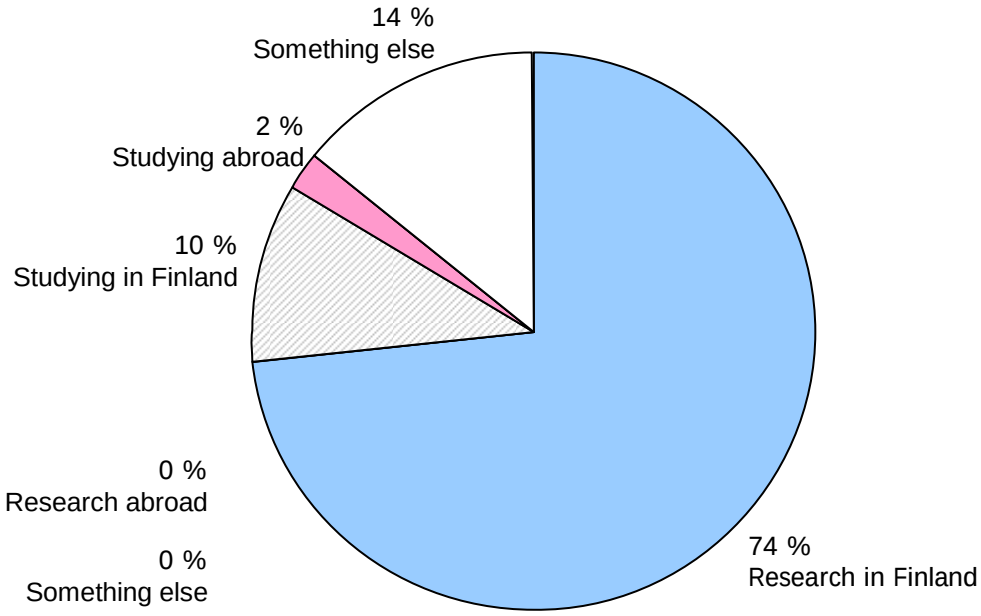
Q7: Which of the following fields does your foundation support?



7.4. Internationalization almost non-existent in the agendas of foundations

Surprisingly, foundations do not explicitly support the internationalization of research and study activities despite the ruling discourse in society according to which Finland is actively trying to promote such activities but unable to motivate individuals to go abroad.

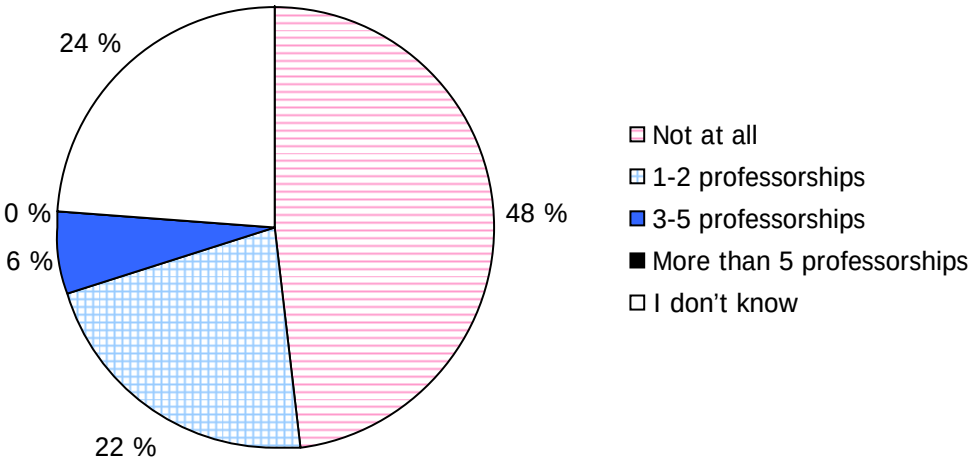
Q8: Which of the following activities does your foundation MAINLY support?



Results to questions 9 and 10 omitted due to low quality of data.

7.5. Foundations not eager to sponsor professorships

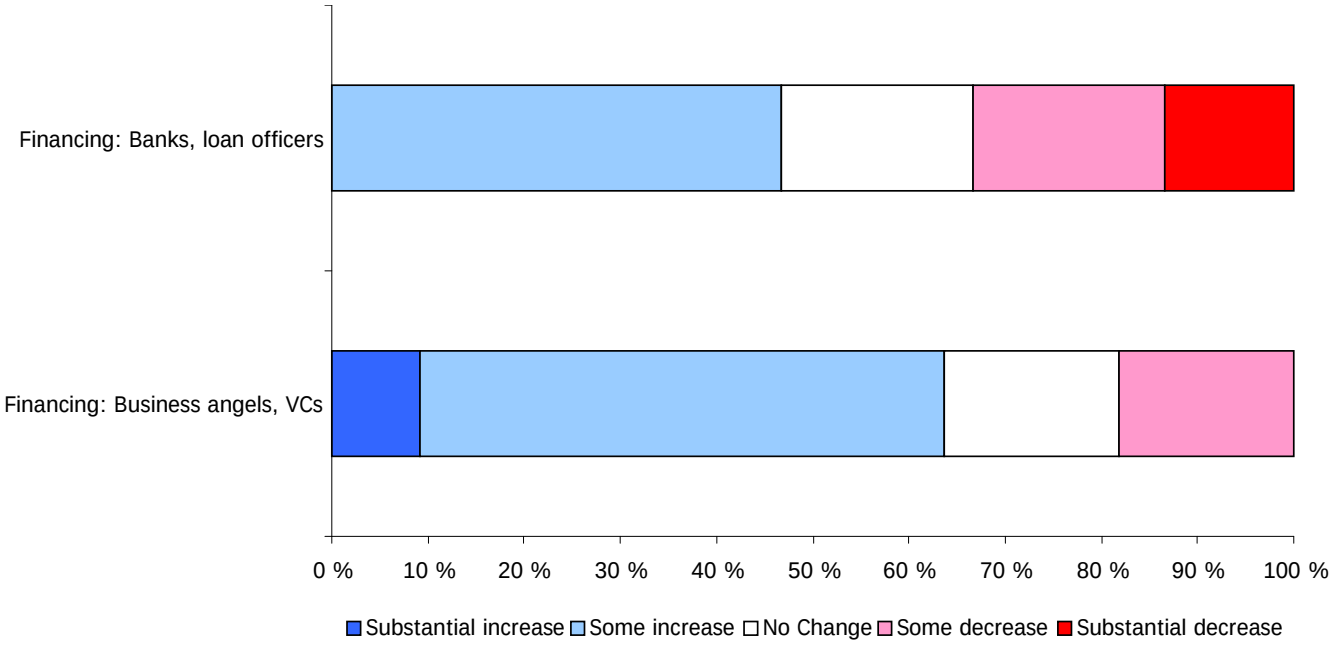
Q11: University departments in Finland are considered too small. To your understanding, would your foundation have the readiness to sponsor a professorship if the government supported the professorship by providing 2.5 Euros for each Euro you provide?



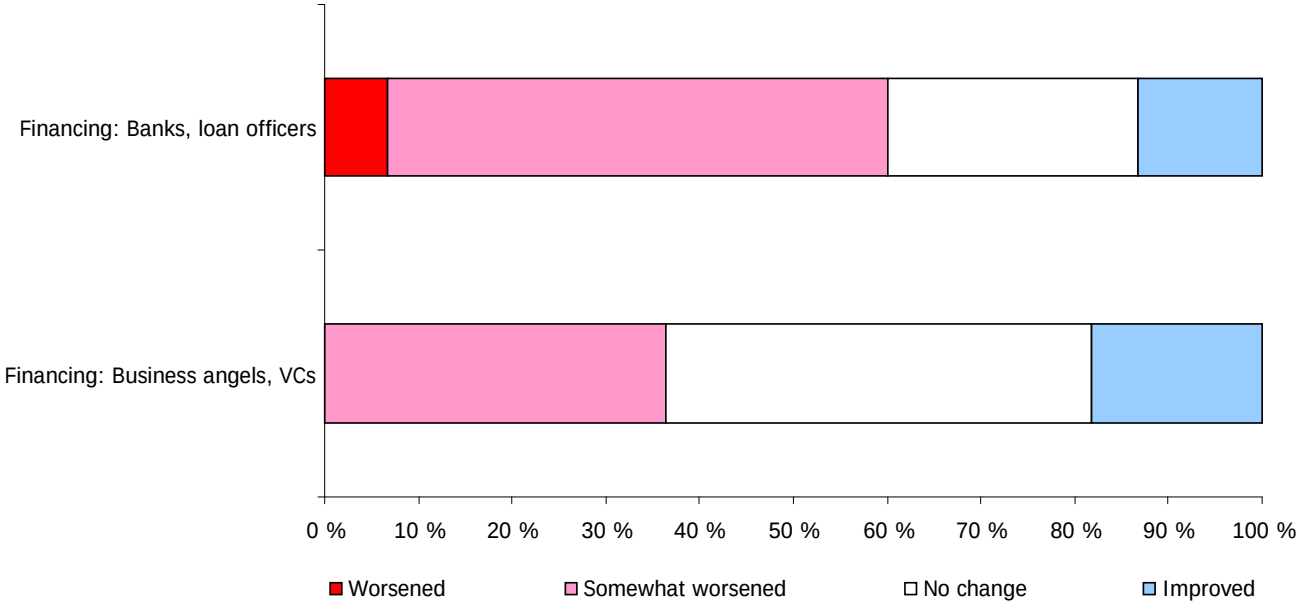
8. Additional questions posed to BUSINESS ANGELS, VENTURE CAPITALISTS, and BANKS

Results to question 14 (banks Q3) are reported in conjunction with those for companies (Q17) in section 2.4.
Results to question 15 (banks Q4) are reported in conjunction with those for companies (Q18) in section 2.5.
Results to question 16 (banks Q5) are reported in conjunction with those for public actors (Q15) in section 3.2.
Results to question 17 are reported in conjunction with those for public actors (Q30) in section 3.12.
Results to question 18 (banks Q6) are reported in conjunction with those for companies (Q23) in section 2.10.

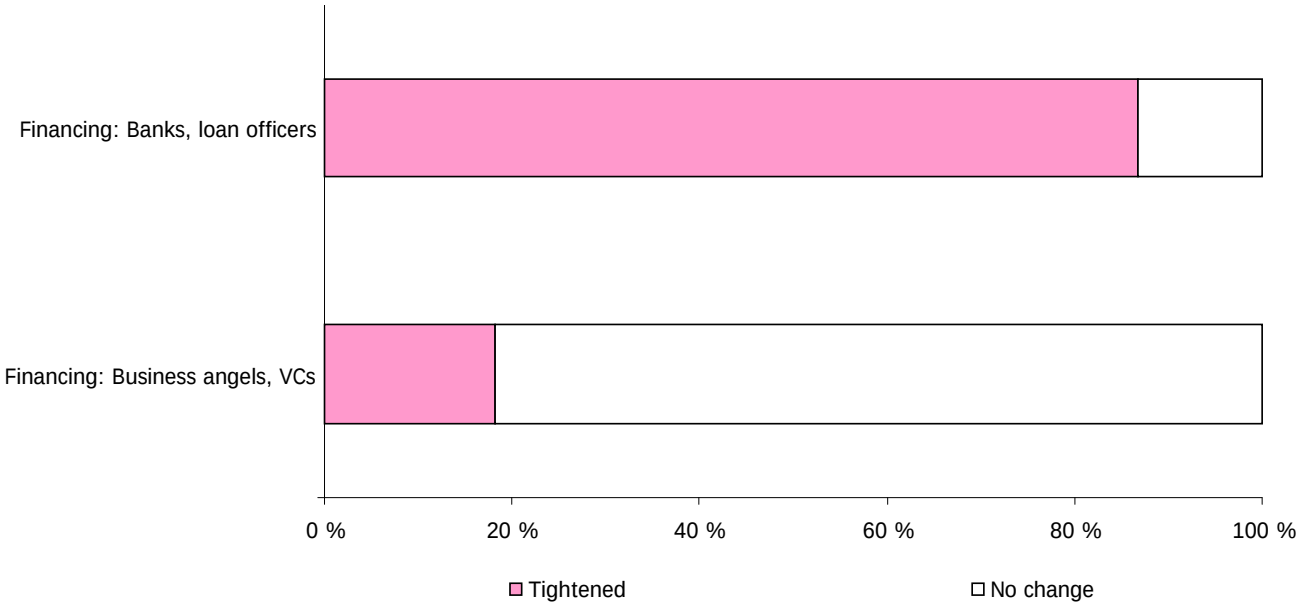
Q19 (Banks Q7): Has the financial crisis changed the amount of incoming funding applications?



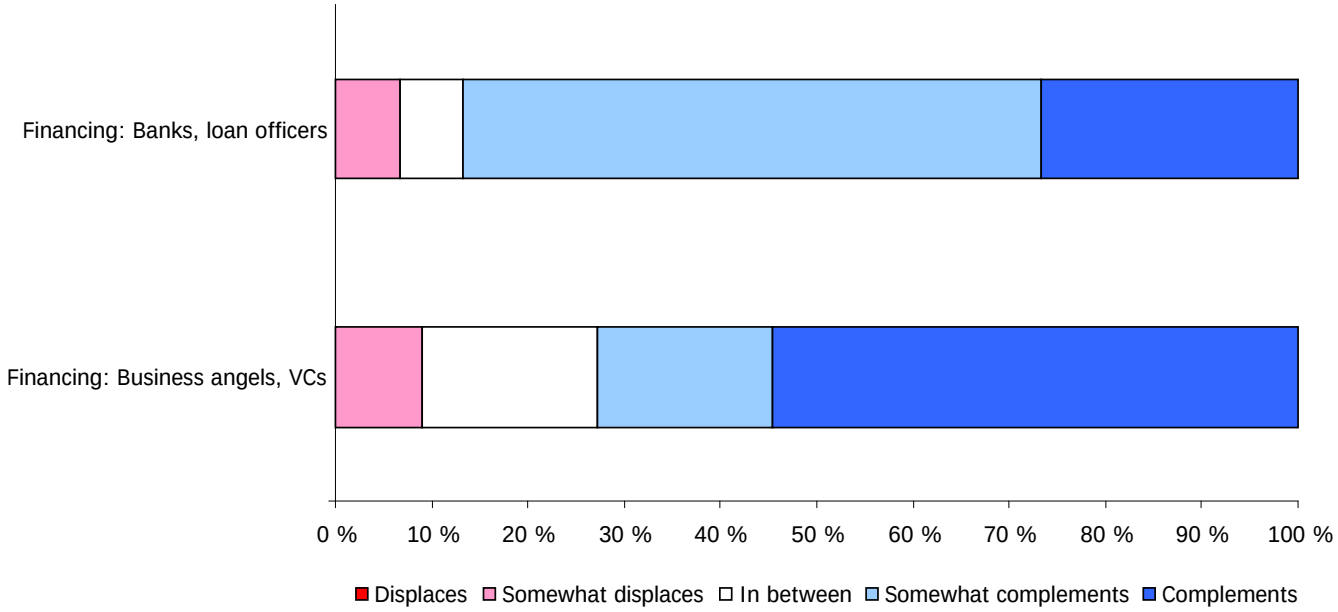
Q20 (banks Q8): Has the quality of funding applications changed due to the financial crisis?



Q21 (banks Q9): Have you changed your investment or funding criteria due to the financial crisis?



Q22 (banks Q10): Does governmental funding displace or complement your operations as a private provider of corporate funding?



APPENDIX III - Complete data tables

QUESTIONS 1-13

1-3 How would you grade the national innovation system...

	5 years ago	*today*	*in 5 years*
Firms: Smaller innovative firms	6.7	7.0	7.4
Firms: Larger innovative firms	6.9	7.2	7.5
Firms: Other firms	6.6	7.0	7.5
Gov.: Innovation support gov. orgs.	7.8	7.8	8.2
Gov.: Education support gov. orgs.	7.3	8.0	8.6
Gov.: Other ministries	6.5	7.1	7.8
Gov.: Other public sector orgs.	7.2	7.4	8.1
Education: University department heads	7.0	7.3	7.4
Education: University rectors	6.5	7.1	7.8
Education: Polytechnic rectors	6.8	7.6	8.1
Associations	7.0	7.6	8.2
Municipalities	7.1	7.5	7.9
Research: Public research institutes	8.4	8.3	8.0
Research: Other research instititutes	7.5	7.6	7.7
Intermediaries: TE-centres	7.4	7.4	7.8
Intermediaries: Other intermediaries	6.9	7.3	7.9
Foundations	7.0	7.5	7.7
Financing: Business angels and VCs	6.7	7.5	7.8
Financing: Banks, loan officers	-	6.7	-
Average	7.1	7.4	7.9

4 How would you describe the regime constituted by the PUBLIC SECTOR actors in the NIS?

	Very simple	*Rather simple*	*Rather complicated*	*Very simple*	*I don't know*
Firms: Smaller innovative firms	1.4 %	13.1 %	55.1 %	16.1 %	14.3 %
Firms: Larger innovative firms	0.5 %	14.5 %	56.5 %	15.7 %	12.9 %
Firms: Other firms	0.6 %	13.0 %	39.4 %	8.9 %	38.2 %
Total	1.0 %	13.3 %	50.1 %	13.6 %	22.0 %
Gov.: Innovation support gov. orgs.	6.3 %	12.5 %	60.7 %	20.5 %	0.0 %
Gov.: Education support gov. orgs.	12.5 %	42.5 %	40.0 %	5.0 %	0.0 %
Gov.: Other ministries	3.6 %	2.9 %	93.6 %	0.0 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	16.7 %	63.9 %	19.4 %	0.0 %
Total	2.2 %	14.8 %	69.2 %	13.8 %	0.0 %
Education: University department heads	0.5 %	13.4 %	54.8 %	17.1 %	14.3 %
Education: University rectors	0.0 %	0.0 %	54.6 %	36.4 %	9.1 %
Education: Polytechnic rectors	0.0 %	11.8 %	64.7 %	17.7 %	5.9 %
Associations	0.0 %	12.0 %	64.0 %	16.0 %	8.0 %
Municipalities	0.0 %	15.0 %	66.1 %	17.6 %	1.3 %
Research: Public research institutes	0.0 %	28.6 %	71.4 %	0.0 %	0.0 %
Research: Other research instititutes	0.0 %	14.3 %	42.9 %	42.9 %	0.0 %
Intermediaries: TE-centres	0.0 %	9.1 %	54.6 %	36.4 %	0.0 %
Intermediaries: Other intermediaries	0.0 %	6.6 %	55.3 %	35.5 %	2.6 %
Foundations	0.0 %	10.5 %	59.7 %	12.3 %	17.5 %
Financing: Business angels and VCs	0.0 %	9.1 %	45.5 %	45.5 %	0.0 %
Total	0.2 %	11.8 %	58.0 %	20.5 %	9.5 %

5 From the point of view of YOUR OWN ORGANISATION, how important do you consider the following governmental actors of the NIS? Please choose ONE alternative for each organisation.

5a Finnish Funding Agency for Technology and Innovation (TEKES)

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	7.4 %	16.2 %	27.9 %	45.6 %	2.9 %
Firms: Larger innovative firms	4.7 %	12.7 %	34.5 %	44.6 %	3.5 %
Firms: Other firms	15.6 %	27.3 %	24.0 %	22.1 %	11.0 %
Total	9.1 %	18.5 %	28.0 %	39.1 %	5.2 %
Gov.: Innovation support gov. orgs.	0.0 %	0.0 %	3.6 %	96.4 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	0.0 %	100.0 %	0.0 %
Gov.: Other ministries	7.1 %	7.1 %	13.6 %	57.9 %	14.3 %
Gov.: Other public sector orgs.	0.0 %	0.0 %	5.6 %	93.1 %	1.4 %
Total	1.7 %	1.7 %	7.0 %	85.3 %	4.3 %
Education: University department heads	10.6 %	9.7 %	21.7 %	56.5 %	1.5 %
Education: University rectors	0.0 %	10.0 %	10.0 %	80.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	0.0 %	5.9 %	94.1 %	0.0 %
Associations	0.0 %	0.0 %	28.0 %	72.0 %	0.0 %
Municipalities	2.3 %	15.1 %	34.1 %	46.0 %	2.5 %
Research: Public research institutes	0.0 %	0.0 %	14.3 %	85.7 %	0.0 %
Research: Other research instititutes	0.0 %	0.0 %	28.6 %	71.4 %	0.0 %
Intermediaries: TE-centres	0.0 %	0.0 %	18.2 %	81.8 %	0.0 %
Intermediaries: Other intermediaries	2.6 %	2.6 %	17.1 %	77.6 %	0.0 %
Financing: Business angels and VCs	0.0 %	0.0 %	9.1 %	90.9 %	0.0 %
Total	1.6 %	3.7 %	18.7 %	75.6 %	0.4 %

5b Finnish Innovation Fund (Sitra)

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	19.7 %	39.4 %	24.4 %	8.7 %	7.8 %
Firms: Larger innovative firms	15.4 %	39.5 %	24.5 %	12.0 %	8.6 %
Firms: Other firms	27.3 %	28.1 %	17.4 %	9.9 %	17.3 %
Total	21.0 %	36.4 %	22.5 %	9.6 %	10.5 %
Gov.: Innovation support gov. orgs.	12.5 %	30.4 %	53.6 %	3.6 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	32.5 %	67.5 %	0.0 %	0.0 %
Gov.: Other ministries	3.6 %	25.0 %	10.0 %	47.1 %	14.3 %
Gov.: Other public sector orgs.	1.4 %	24.1 %	61.6 %	13.0 %	0.0 %
Total	2.6 %	25.3 %	49.0 %	19.7 %	3.5 %
Education: University department heads	15.3 %	46.8 %	23.7 %	10.3 %	3.9 %
Education: University rectors	10.0 %	30.0 %	50.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	11.8 %	70.6 %	17.7 %	0.0 %
Associations	0.0 %	12.0 %	60.0 %	28.0 %	0.0 %
Municipalities	5.6 %	23.0 %	39.0 %	29.9 %	2.5 %
Research: Public research institutes	0.0 %	28.6 %	57.1 %	14.3 %	0.0 %
Research: Other research instititutes	0.0 %	42.9 %	28.6 %	28.6 %	0.0 %
Intermediaries: TE-centres	9.1 %	27.3 %	54.6 %	9.1 %	0.0 %
Intermediaries: Other intermediaries	14.7 %	42.7 %	26.7 %	13.3 %	2.7 %
Financing: Business angels and VCs	0.0 %	63.6 %	27.3 %	9.1 %	0.0 %
Total	5.5 %	32.9 %	43.7 %	17.0 %	0.9 %

5c The Academy of Finland

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	33.3 %	37.1 %	14.2 %	5.0 %	10.4 %
Firms: Larger innovative firms	27.6 %	36.2 %	21.1 %	4.1 %	10.9 %
Firms: Other firms	39.3 %	26.4 %	10.8 %	5.1 %	18.5 %
Total	33.9 %	34.1 %	14.6 %	4.8 %	12.7 %
Gov.: Innovation support gov. orgs.	0.0 %	0.0 %	41.1 %	58.9 %	100.0 %
Gov.: Education support gov. orgs.	5.0 %	0.0 %	5.0 %	90.0 %	100.0 %
Gov.: Other ministries	0.0 %	14.3 %	27.9 %	57.9 %	100.0 %
Gov.: Other public sector orgs.	0.0 %	26.9 %	29.6 %	43.5 %	100.0 %
Total	0.3 %	20.1 %	28.3 %	51.3 %	100.0 %
Education: University department heads	1.9 %	1.9 %	14.1 %	81.6 %	0.5 %
Education: University rectors	0.0 %	0.0 %	27.3 %	72.7 %	0.0 %
Education: Polytechnic rectors	11.8 %	35.3 %	35.3 %	17.7 %	0.0 %
Associations	4.0 %	36.0 %	24.0 %	36.0 %	0.0 %
Municipalities	14.5 %	40.4 %	19.4 %	21.9 %	3.8 %
Research: Public research institutes	0.0 %	0.0 %	85.7 %	14.3 %	0.0 %
Research: Other research instititutes	0.0 %	0.0 %	28.6 %	71.4 %	0.0 %
Intermediaries: TE-centres	9.1 %	36.4 %	27.3 %	27.3 %	0.0 %
Intermediaries: Other intermediaries	14.7 %	40.0 %	34.7 %	8.0 %	2.7 %
Financing: Business angels and VCs	9.1 %	54.6 %	27.3 %	9.1 %	0.0 %
Total	6.5 %	24.5 %	32.4 %	36.0 %	0.7 %

5d Ministry of employment and the economy (TEM)

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	12.2 %	22.1 %	34.7 %	25.0 %	5.9 %
Firms: Larger innovative firms	9.6 %	22.8 %	39.7 %	24.4 %	3.5 %
Firms: Other firms	10.0 %	20.2 %	39.6 %	19.7 %	10.5 %
Total	11.2 %	21.7 %	36.9 %	23.5 %	6.7 %
Gov.: Innovation support gov. orgs.	6.3 %	0.0 %	3.6 %	86.6 %	3.6 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	10.0 %	90.0 %	0.0 %
Gov.: Other ministries	7.1 %	0.0 %	17.9 %	60.7 %	14.3 %
Gov.: Other public sector orgs.	0.0 %	1.4 %	29.2 %	69.4 %	0.0 %
Total	2.2 %	0.9 %	23.4 %	69.9 %	3.7 %
Education: University department heads	16.1 %	32.2 %	30.2 %	14.2 %	7.3 %
Education: University rectors	10.0 %	10.0 %	60.0 %	20.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	0.0 %	52.9 %	41.2 %	5.9 %
Associations	0.0 %	12.0 %	32.0 %	52.0 %	4.0 %
Municipalities	1.1 %	4.9 %	33.8 %	59.7 %	0.6 %
Research: Public research institutes	0.0 %	0.0 %	28.6 %	71.4 %	0.0 %
Research: Other research instititutes	0.0 %	42.9 %	14.3 %	42.9 %	0.0 %
Intermediaries: TE-centres	0.0 %	0.0 %	18.2 %	81.8 %	0.0 %
Intermediaries: Other intermediaries	2.6 %	9.2 %	14.5 %	72.4 %	1.3 %
Financing: Business angels and VCs	0.0 %	18.2 %	27.3 %	54.6 %	0.0 %
Total	3.0 %	12.9 %	31.2 %	51.0 %	1.9 %

5e Ministry of education (OPM)

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	22.8 %	30.1 %	26.0 %	13.9 %	7.1 %
Firms: Larger innovative firms	17.4 %	31.3 %	29.0 %	14.9 %	7.4 %
Firms: Other firms	19.1 %	29.1 %	26.9 %	9.7 %	15.3 %
Total	20.8 %	30.0 %	26.8 %	13.0 %	9.4 %
Gov.: Innovation support gov. orgs.	6.3 %	0.0 %	40.2 %	53.6 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	17.5 %	82.5 %	0.0 %
Gov.: Other ministries	7.4 %	3.7 %	58.5 %	30.4 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	14.4 %	47.7 %	36.6 %	1.4 %
Total	2.2 %	9.9 %	47.6 %	39.5 %	0.9 %
Education: University department heads	2.9 %	8.8 %	21.1 %	64.7 %	2.5 %
Education: University rectors	0.0 %	9.1 %	18.2 %	72.7 %	0.0 %
Education: Polytechnic rectors	0.0 %	0.0 %	23.5 %	70.6 %	5.9 %
Associations	0.0 %	24.0 %	28.0 %	48.0 %	0.0 %
Municipalities	1.1 %	13.5 %	36.2 %	49.3 %	0.0 %
Research: Public research institutes	0.0 %	28.6 %	71.4 %	0.0 %	0.0 %
Research: Other research instititutes	0.0 %	14.3 %	71.4 %	14.3 %	0.0 %
Intermediaries: TE-centres	0.0 %	27.3 %	45.5 %	27.3 %	0.0 %
Intermediaries: Other intermediaries	10.5 %	26.3 %	42.1 %	17.1 %	4.0 %
Financing: Business angels and VCs	9.1 %	54.6 %	0.0 %	36.4 %	0.0 %
Total	2.4 %	20.6 %	35.7 %	40.0 %	1.2 %

5f Ministry of social affairs and health (STM)

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	33.9 %	34.5 %	14.5 %	8.1 %	9.0 %
Firms: Larger innovative firms	25.8 %	38.4 %	17.2 %	9.3 %	9.3 %
Firms: Other firms	25.0 %	35.9 %	18.0 %	6.1 %	15.0 %
Total	30.1 %	35.6 %	15.9 %	7.8 %	10.6 %
Gov.: Innovation support gov. orgs.	9.8 %	31.3 %	49.1 %	9.8 %	0.0 %
Gov.: Education support gov. orgs.	5.0 %	5.0 %	72.5 %	17.5 %	0.0 %
Gov.: Other ministries	10.7 %	25.0 %	57.9 %	6.4 %	0.0 %
Gov.: Other public sector orgs.	12.5 %	43.5 %	31.0 %	9.7 %	3.2 %
Total	11.4 %	35.6 %	41.6 %	9.5 %	2.0 %
Education: University department heads	23.0 %	32.8 %	27.9 %	9.8 %	6.4 %
Education: University rectors	10.0 %	70.0 %	10.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	23.5 %	70.6 %	5.9 %	0.0 %
Associations	20.8 %	58.3 %	8.3 %	12.5 %	0.0 %
Municipalities	3.4 %	16.3 %	36.8 %	43.6 %	0.0 %
Research: Public research institutes	0.0 %	85.7 %	14.3 %	0.0 %	0.0 %
Research: Other research instititutes	28.6 %	57.1 %	14.3 %	0.0 %	0.0 %
Intermediaries: TE-centres	0.0 %	63.6 %	36.4 %	0.0 %	0.0 %
Intermediaries: Other intermediaries	19.7 %	52.6 %	19.7 %	1.3 %	6.6 %
Financing: Business angels and VCs	36.4 %	36.4 %	18.2 %	9.1 %	0.0 %
Total	14.2 %	49.6 %	25.6 %	9.2 %	1.3 %

5g Ministry of Finance (VM)

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	19.9 %	27.5 %	27.2 %	18.7 %	6.7 %
Firms: Larger innovative firms	14.1 %	25.8 %	33.6 %	19.7 %	6.8 %
Firms: Other firms	17.4 %	23.6 %	26.0 %	18.9 %	14.1 %
Total	18.2 %	26.1 %	28.0 %	19.0 %	8.7 %
Gov.: Innovation support gov. orgs.	6.3 %	17.0 %	24.1 %	52.7 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	5.0 %	22.5 %	72.5 %	0.0 %
Gov.: Other ministries	0.0 %	3.6 %	17.1 %	79.3 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	13.0 %	40.3 %	45.4 %	1.4 %
Total	0.4 %	10.4 %	32.4 %	55.9 %	0.9 %
Education: University department heads	14.2 %	18.6 %	30.9 %	27.9 %	8.3 %
Education: University rectors	0.0 %	0.0 %	90.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	17.7 %	41.2 %	35.3 %	5.9 %
Associations	4.0 %	28.0 %	24.0 %	44.0 %	0.0 %
Municipalities	4.8 %	18.8 %	22.5 %	53.4 %	0.6 %
Research: Public research institutes	0.0 %	28.6 %	42.9 %	28.6 %	0.0 %
Research: Other research instititutes	0.0 %	28.6 %	42.9 %	28.6 %	0.0 %
Intermediaries: TE-centres	9.1 %	45.5 %	27.3 %	18.2 %	0.0 %
Intermediaries: Other intermediaries	21.3 %	32.0 %	24.0 %	18.7 %	4.0 %
Financing: Business angels and VCs	0.0 %	18.2 %	45.5 %	36.4 %	0.0 %
Total	5.3 %	23.6 %	39.1 %	30.1 %	1.9 %

5h Other ministries

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	27.4 %	38.1 %	19.0 %	4.4 %	11.1 %
Firms: Larger innovative firms	19.1 %	46.1 %	19.8 %	3.4 %	11.7 %
Firms: Other firms	22.3 %	37.7 %	16.1 %	4.7 %	19.3 %
Total	24.5 %	39.4 %	18.4 %	4.3 %	13.4 %
Gov.: Innovation support gov. orgs.	10.2 %	63.0 %	26.9 %	0.0 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	27.5 %	67.5 %	5.0 %	0.0 %
Gov.: Other ministries	0.0 %	33.6 %	52.1 %	10.7 %	3.6 %
Gov.: Other public sector orgs.	5.6 %	17.1 %	58.8 %	8.3 %	10.2 %
Total	4.1 %	24.9 %	55.7 %	8.1 %	7.2 %
Education: University department heads	15.3 %	46.8 %	24.1 %	2.5 %	11.3 %
Education: University rectors	0.0 %	80.0 %	20.0 %	0.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	52.9 %	35.3 %	11.8 %	0.0 %
Associations	8.3 %	54.2 %	29.2 %	4.2 %	4.2 %
Municipalities	5.8 %	35.6 %	39.0 %	16.8 %	2.8 %
Research: Public research institutes	0.0 %	42.9 %	28.6 %	28.6 %	0.0 %
Research: Other research instititutes	14.3 %	42.9 %	28.6 %	0.0 %	14.3 %
Intermediaries: TE-centres	9.1 %	63.6 %	27.3 %	0.0 %	0.0 %
Intermediaries: Other intermediaries	22.7 %	48.0 %	21.3 %	2.7 %	5.3 %
Financing: Business angels and VCs	27.3 %	45.5 %	9.1 %	9.1 %	9.1 %
Total	10.3 %	51.2 %	26.2 %	7.6 %	4.7 %

5i Technical Research Centre of Finland (VTT)

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	11.8 %	24.9 %	32.8 %	25.2 %	5.3 %
Firms: Larger innovative firms	7.6 %	17.3 %	43.1 %	29.1 %	2.9 %
Firms: Other firms	9.9 %	25.4 %	34.5 %	20.1 %	10.2 %
Total	10.5 %	23.7 %	35.1 %	24.6 %	6.2 %
Gov.: Innovation support gov. orgs.	0.0 %	6.3 %	27.7 %	66.1 %	0.0 %
Gov.: Education support gov. orgs.	5.0 %	0.0 %	25.0 %	70.0 %	0.0 %
Gov.: Other ministries	0.0 %	21.4 %	19.3 %	48.6 %	10.7 %
Gov.: Other public sector orgs.	0.0 %	18.1 %	31.0 %	50.9 %	0.0 %
Total	0.3 %	16.8 %	27.5 %	52.7 %	2.6 %
Education: University department heads	17.6 %	32.2 %	31.2 %	15.6 %	3.4 %
Education: University rectors	10.0 %	0.0 %	50.0 %	40.0 %	0.0 %
Education: Polytechnic rectors	5.9 %	23.5 %	29.4 %	41.2 %	0.0 %
Associations	0.0 %	12.0 %	48.0 %	40.0 %	0.0 %
Municipalities	2.4 %	36.4 %	31.0 %	29.0 %	1.2 %
Research: Public research institutes	0.0 %	0.0 %	42.9 %	57.1 %	0.0 %
Research: Other research instititutes	14.3 %	28.6 %	57.1 %	0.0 %	0.0 %
Intermediaries: TE-centres	0.0 %	0.0 %	54.6 %	45.5 %	0.0 %
Intermediaries: Other intermediaries	2.6 %	25.0 %	35.5 %	36.8 %	0.0 %
Financing: Business angels and VCs	0.0 %	18.2 %	36.4 %	45.5 %	0.0 %
Total	5.3 %	17.6 %	41.6 %	35.1 %	0.5 %

5j Other public research organizations

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	15.6 %	30.5 %	34.3 %	9.2 %	10.4 %
Firms: Larger innovative firms	11.3 %	27.1 %	40.7 %	9.3 %	11.7 %
Firms: Other firms	19.3 %	31.5 %	26.2 %	8.2 %	14.8 %
Total	15.8 %	30.2 %	33.3 %	8.9 %	11.8 %
Gov.: Innovation support gov. orgs.	0.0 %	22.3 %	64.3 %	13.4 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	5.0 %	37.5 %	57.5 %	0.0 %
Gov.: Other ministries	3.7 %	7.4 %	38.5 %	43.0 %	7.4 %
Gov.: Other public sector orgs.	0.0 %	20.8 %	63.0 %	16.2 %	0.0 %
Total	0.9 %	16.7 %	55.5 %	25.2 %	1.7 %
Education: University department heads	5.9 %	31.0 %	44.8 %	14.8 %	3.5 %
Education: University rectors	0.0 %	20.0 %	70.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	5.9 %	11.8 %	47.1 %	29.4 %	5.9 %
Associations	4.2 %	25.0 %	62.5 %	8.3 %	0.0 %
Municipalities	3.5 %	29.2 %	48.6 %	14.8 %	3.9 %
Research: Public research institutes	0.0 %	0.0 %	71.4 %	28.6 %	0.0 %
Research: Other research instititutes	0.0 %	71.4 %	28.6 %	0.0 %	0.0 %
Intermediaries: TE-centres	0.0 %	18.2 %	45.5 %	36.4 %	0.0 %
Intermediaries: Other intermediaries	4.0 %	27.6 %	40.8 %	22.4 %	5.3 %
Financing: Business angels and VCs	0.0 %	45.5 %	45.5 %	9.1 %	0.0 %
Total	2.3 %	28.0 %	50.5 %	17.4 %	1.9 %

5k Finpro

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	17.5 %	35.1 %	28.9 %	8.7 %	9.8 %
Firms: Larger innovative firms	19.3 %	31.4 %	30.4 %	9.9 %	8.9 %
Firms: Other firms	25.1 %	29.0 %	19.6 %	7.0 %	19.4 %
Total	19.9 %	32.8 %	26.7 %	8.4 %	12.2 %
Gov.: Innovation support gov. orgs.	6.3 %	9.8 %	54.5 %	25.9 %	3.6 %
Gov.: Education support gov. orgs.	0.0 %	20.0 %	70.0 %	10.0 %	0.0 %
Gov.: Other ministries	14.3 %	13.6 %	20.7 %	35.0 %	16.4 %
Gov.: Other public sector orgs.	2.8 %	41.7 %	41.7 %	12.5 %	1.4 %
Total	5.6 %	31.2 %	39.5 %	18.7 %	5.1 %
Education: University department heads	26.5 %	35.0 %	15.0 %	5.5 %	18.0 %
Education: University rectors	10.0 %	50.0 %	30.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	5.9 %	35.3 %	23.5 %	29.4 %	5.9 %
Associations	12.5 %	45.8 %	25.0 %	16.7 %	0.0 %
Municipalities	9.3 %	47.4 %	30.8 %	8.6 %	4.0 %
Research: Public research institutes	14.3 %	57.1 %	28.6 %	0.0 %	0.0 %
Research: Other research instititutes	28.6 %	57.1 %	14.3 %	0.0 %	0.0 %
Intermediaries: TE-centres	9.1 %	27.3 %	45.5 %	18.2 %	0.0 %
Intermediaries: Other intermediaries	9.3 %	29.3 %	42.7 %	17.3 %	1.3 %
Financing: Business angels and VCs	18.2 %	45.5 %	18.2 %	18.2 %	0.0 %
Total	14.4 %	43.0 %	27.3 %	12.4 %	2.9 %

5l Foundation for Finnish inventions

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	26.2 %	36.2 %	19.1 %	9.2 %	9.4 %
Firms: Larger innovative firms	24.9 %	40.9 %	18.8 %	5.0 %	10.4 %
Firms: Other firms	31.5 %	28.5 %	13.3 %	11.3 %	15.4 %
Total	27.4 %	35.0 %	17.5 %	9.0 %	11.2 %
Gov.: Innovation support gov. orgs.	6.3 %	29.5 %	50.9 %	9.8 %	3.6 %
Gov.: Education support gov. orgs.	5.0 %	67.5 %	22.5 %	5.0 %	0.0 %
Gov.: Other ministries	25.0 %	31.4 %	24.3 %	9.3 %	10.0 %
Gov.: Other public sector orgs.	5.6 %	52.8 %	33.3 %	6.9 %	1.4 %
Total	10.3 %	47.0 %	31.6 %	7.6 %	3.5 %
Education: University department heads	30.1 %	38.9 %	13.3 %	8.9 %	8.9 %
Education: University rectors	10.0 %	40.0 %	40.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	5.9 %	41.2 %	23.5 %	29.4 %	0.0 %
Associations	8.0 %	44.0 %	36.0 %	12.0 %	0.0 %
Municipalities	11.6 %	49.4 %	18.6 %	15.1 %	5.3 %
Research: Public research institutes	28.6 %	42.9 %	28.6 %	0.0 %	0.0 %
Research: Other research instititutes	42.9 %	42.9 %	0.0 %	0.0 %	14.3 %
Intermediaries: TE-centres	0.0 %	9.1 %	36.4 %	54.6 %	0.0 %
Intermediaries: Other intermediaries	7.9 %	32.9 %	36.8 %	22.4 %	0.0 %
Financing: Business angels and VCs	18.2 %	36.4 %	27.3 %	18.2 %	0.0 %
Total	16.3 %	37.8 %	26.1 %	17.0 %	2.8 %

5m Universities

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	6.3 %	19.2 %	33.8 %	36.7 %	4.1 %
Firms: Larger innovative firms	4.7 %	9.5 %	40.1 %	42.9 %	2.8 %
Firms: Other firms	15.7 %	22.9 %	26.5 %	25.5 %	9.4 %
Total	8.5 %	18.4 %	33.0 %	34.8 %	5.3 %
Gov.: Innovation support gov. orgs.	0.0 %	0.0 %	100.0 %	0.0 %	100.0 %
Gov.: Education support gov. orgs.	5.0 %	5.0 %	77.5 %	12.5 %	100.0 %
Gov.: Other ministries	7.1 %	39.3 %	53.6 %	0.0 %	100.0 %
Gov.: Other public sector orgs.	0.0 %	26.4 %	73.6 %	0.0 %	100.0 %
Total	2.1 %	26.2 %	70.9 %	0.9 %	100.0 %
Education: University department heads	0.0 %	1.0 %	6.8 %	89.3 %	2.9 %
Education: University rectors	0.0 %	0.0 %	9.1 %	72.7 %	18.2 %
Education: Polytechnic rectors	0.0 %	0.0 %	11.8 %	82.4 %	5.9 %
Associations	0.0 %	8.0 %	32.0 %	60.0 %	0.0 %
Municipalities	0.0 %	11.6 %	33.5 %	53.1 %	1.8 %
Research: Public research institutes	0.0 %	0.0 %	14.3 %	85.7 %	0.0 %
Research: Other research instititutes	0.0 %	0.0 %	14.3 %	85.7 %	0.0 %
Intermediaries: TE-centres	0.0 %	0.0 %	36.4 %	63.6 %	0.0 %
Intermediaries: Other intermediaries	2.7 %	5.3 %	32.0 %	60.0 %	0.0 %
Financing: Business angels and VCs	0.0 %	0.0 %	54.6 %	45.5 %	0.0 %
Total	0.3 %	2.6 %	24.5 %	69.8 %	2.9 %

5n Polytechnics

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	11.3 %	25.5 %	36.4 %	22.5 %	4.2 %
Firms: Larger innovative firms	5.9 %	20.3 %	47.4 %	23.7 %	2.6 %
Firms: Other firms	9.2 %	25.6 %	34.2 %	22.4 %	8.5 %
Total	9.8 %	24.6 %	37.8 %	22.7 %	5.1 %
Gov.: Innovation support gov. orgs.	6.3 %	3.6 %	63.4 %	26.8 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	10.0 %	27.5 %	62.5 %	0.0 %
Gov.: Other ministries	10.7 %	25.0 %	40.7 %	20.7 %	2.9 %
Gov.: Other public sector orgs.	5.6 %	34.7 %	38.0 %	21.8 %	0.0 %
Total	6.5 %	28.5 %	39.7 %	24.7 %	0.7 %
Education: University department heads	14.0 %	38.7 %	37.2 %	9.2 %	1.0 %
Education: University rectors	0.0 %	20.0 %	60.0 %	20.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	0.0 %	5.9 %	88.2 %	5.9 %
Associations	8.0 %	28.0 %	52.0 %	12.0 %	0.0 %
Municipalities	0.0 %	11.4 %	44.6 %	42.8 %	1.2 %
Research: Public research institutes	0.0 %	57.1 %	28.6 %	14.3 %	0.0 %
Research: Other research instititutes	14.3 %	57.1 %	14.3 %	0.0 %	14.3 %
Intermediaries: TE-centres	0.0 %	0.0 %	81.8 %	18.2 %	0.0 %
Intermediaries: Other intermediaries	1.3 %	15.8 %	35.5 %	47.4 %	0.0 %
Financing: Business angels and VCs	9.1 %	54.6 %	27.3 %	9.1 %	0.0 %
Total	4.7 %	28.3 %	38.7 %	26.1 %	2.2 %

5o Local Te-centres

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	12.3 %	21.5 %	33.8 %	28.4 %	4.1 %
Firms: Larger innovative firms	16.2 %	25.8 %	31.6 %	22.8 %	3.6 %
Firms: Other firms	13.8 %	22.2 %	32.2 %	23.0 %	8.9 %
Total	13.4 %	22.4 %	33.0 %	25.9 %	5.3 %
Gov.: Innovation support gov. orgs.	6.3 %	17.0 %	70.5 %	6.3 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	5.0 %	60.0 %	35.0 %	0.0 %
Gov.: Other ministries	25.0 %	31.4 %	23.6 %	13.6 %	6.4 %
Gov.: Other public sector orgs.	1.5 %	41.2 %	45.6 %	10.3 %	1.5 %
Total	7.6 %	34.4 %	42.9 %	12.6 %	2.5 %
Education: University department heads	18.9 %	37.9 %	26.7 %	10.7 %	5.8 %
Education: University rectors	10.0 %	30.0 %	50.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	11.8 %	47.1 %	41.2 %	0.0 %
Associations	12.0 %	28.0 %	52.0 %	8.0 %	0.0 %
Municipalities	2.1 %	21.7 %	18.6 %	55.8 %	1.8 %
Research: Public research institutes	0.0 %	42.9 %	28.6 %	28.6 %	0.0 %
Research: Other research instititutes	42.9 %	14.3 %	28.6 %	0.0 %	14.3 %
Intermediaries: TE-centres	0.0 %	0.0 %	18.2 %	81.8 %	0.0 %
Intermediaries: Other intermediaries	2.6 %	6.6 %	34.2 %	56.6 %	0.0 %
Financing: Business angels and VCs	0.0 %	18.2 %	54.6 %	27.3 %	0.0 %
Total	8.9 %	21.1 %	35.8 %	32.0 %	2.2 %

5p Finnvera

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	12.5 %	24.9 %	29.6 %	27.9 %	5.2 %
Firms: Larger innovative firms	18.3 %	33.1 %	24.5 %	18.1 %	6.0 %
Firms: Other firms	15.9 %	27.0 %	24.3 %	21.8 %	10.9 %
Total	14.4 %	26.9 %	27.3 %	24.6 %	6.8 %
Gov.: Innovation support gov. orgs.	0.0 %	10.7 %	47.3 %	38.4 %	3.6 %
Gov.: Education support gov. orgs.	0.0 %	20.0 %	42.5 %	37.5 %	0.0 %
Gov.: Other ministries	14.3 %	14.3 %	30.7 %	31.4 %	9.3 %
Gov.: Other public sector orgs.	0.0 %	54.2 %	25.0 %	19.4 %	1.4 %
Total	3.5 %	39.2 %	29.1 %	24.9 %	3.4 %
Education: University department heads	27.3 %	37.1 %	12.2 %	2.4 %	21.0 %
Education: University rectors	20.0 %	40.0 %	30.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	17.7 %	35.3 %	17.7 %	23.5 %	5.9 %
Associations	20.0 %	24.0 %	52.0 %	4.0 %	0.0 %
Municipalities	2.3 %	21.7 %	37.2 %	37.6 %	1.4 %
Research: Public research institutes	28.6 %	42.9 %	28.6 %	0.0 %	0.0 %
Research: Other research instititutes	28.6 %	28.6 %	42.9 %	0.0 %	0.0 %
Intermediaries: TE-centres	0.0 %	9.1 %	54.6 %	36.4 %	0.0 %
Intermediaries: Other intermediaries	6.6 %	18.4 %	48.7 %	26.3 %	0.0 %
Financing: Business angels and VCs	0.0 %	0.0 %	36.4 %	63.6 %	0.0 %
Total	15.1 %	25.7 %	36.0 %	20.4 %	2.8 %

5q Industry Investment

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	28.0 %	34.7 %	20.2 %	5.4 %	11.7 %
Firms: Larger innovative firms	28.9 %	35.8 %	17.3 %	4.8 %	13.2 %
Firms: Other firms	32.5 %	26.2 %	15.4 %	5.5 %	20.5 %
Total	29.4 %	32.7 %	18.4 %	5.3 %	14.3 %
Gov.: Innovation support gov. orgs.	0.0 %	20.4 %	54.6 %	21.3 %	3.7 %
Gov.: Education support gov. orgs.	0.0 %	25.0 %	37.5 %	37.5 %	0.0 %
Gov.: Other ministries	7.1 %	39.3 %	22.9 %	10.7 %	20.0 %
Gov.: Other public sector orgs.	9.7 %	34.7 %	36.6 %	17.6 %	1.4 %
Total	7.8 %	34.2 %	34.5 %	17.6 %	6.0 %
Education: University department heads	35.0 %	28.6 %	12.3 %	4.4 %	19.7 %
Education: University rectors	20.0 %	40.0 %	30.0 %	10.0 %	0.0 %
Education: Polytechnic rectors	41.2 %	11.8 %	17.7 %	23.5 %	5.9 %
Associations	20.8 %	29.2 %	45.8 %	4.2 %	0.0 %
Municipalities	9.3 %	47.1 %	26.4 %	9.6 %	7.6 %
Research: Public research institutes	28.6 %	28.6 %	14.3 %	28.6 %	0.0 %
Research: Other research instititutes	42.9 %	14.3 %	14.3 %	14.3 %	14.3 %
Intermediaries: TE-centres	0.0 %	36.4 %	63.6 %	0.0 %	0.0 %
Intermediaries: Other intermediaries	10.8 %	40.5 %	32.4 %	12.2 %	4.1 %
Financing: Business angels and VCs	0.0 %	9.1 %	63.6 %	27.3 %	0.0 %
Total	20.9 %	28.5 %	32.1 %	13.4 %	5.2 %

5r Expertise and technology centres

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	16.3 %	29.3 %	30.5 %	15.8 %	8.1 %
Firms: Larger innovative firms	14.0 %	32.6 %	33.3 %	11.1 %	9.0 %
Firms: Other firms	18.2 %	27.7 %	28.5 %	11.9 %	13.7 %
Total	16.4 %	29.4 %	30.5 %	13.9 %	9.8 %
Gov.: Innovation support gov. orgs.	12.5 %	19.6 %	30.4 %	33.9 %	3.6 %
Gov.: Education support gov. orgs.	0.0 %	17.5 %	42.5 %	40.0 %	0.0 %
Gov.: Other ministries	4.4 %	25.2 %	27.8 %	42.6 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	38.9 %	33.3 %	25.0 %	2.8 %
Total	1.8 %	33.1 %	32.6 %	30.4 %	2.1 %
Education: University department heads	16.0 %	33.0 %	34.5 %	8.7 %	7.8 %
Education: University rectors	10.0 %	40.0 %	40.0 %	0.0 %	10.0 %
Education: Polytechnic rectors	0.0 %	5.9 %	47.1 %	47.1 %	0.0 %
Associations	8.3 %	25.0 %	58.3 %	8.3 %	0.0 %
Municipalities	2.4 %	15.0 %	33.7 %	46.5 %	2.4 %
Research: Public research institutes	0.0 %	14.3 %	57.1 %	28.6 %	0.0 %
Research: Other research instititutes	57.1 %	14.3 %	28.6 %	0.0 %	0.0 %
Intermediaries: TE-centres	0.0 %	9.1 %	72.7 %	18.2 %	0.0 %
Intermediaries: Other intermediaries	4.0 %	9.3 %	25.3 %	58.7 %	2.7 %
Financing: Business angels and VCs	0.0 %	18.2 %	45.5 %	27.3 %	9.1 %
Total	9.8 %	18.4 %	44.3 %	24.3 %	3.2 %

5s Research and innovation council

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	28.7 %	30.3 %	15.5 %	5.1 %	20.4 %
Firms: Larger innovative firms	24.1 %	33.9 %	16.4 %	2.2 %	23.4 %
Firms: Other firms	27.4 %	28.8 %	15.5 %	5.1 %	23.3 %
Total	27.5 %	30.6 %	15.7 %	4.5 %	21.7 %
Gov.: Innovation support gov. orgs.	0.0 %	9.8 %	20.5 %	69.6 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	5.7 %	11.4 %	82.9 %	0.0 %
Gov.: Other ministries	3.7 %	18.4 %	47.1 %	30.9 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	15.3 %	46.3 %	35.2 %	3.2 %
Total	0.9 %	15.1 %	42.5 %	39.5 %	2.0 %
Education: University department heads	12.8 %	27.0 %	28.9 %	15.7 %	15.7 %
Education: University rectors	0.0 %	20.0 %	40.0 %	40.0 %	0.0 %
Education: Polytechnic rectors	5.9 %	5.9 %	29.4 %	58.8 %	0.0 %
Associations	12.0 %	32.0 %	32.0 %	24.0 %	0.0 %
Municipalities	15.4 %	33.3 %	26.0 %	18.9 %	6.3 %
Research: Public research institutes	0.0 %	14.3 %	28.6 %	57.1 %	0.0 %
Research: Other research instititutes	14.3 %	0.0 %	71.4 %	14.3 %	0.0 %
Intermediaries: TE-centres	20.0 %	0.0 %	60.0 %	0.0 %	20.0 %
Intermediaries: Other intermediaries	18.7 %	18.7 %	41.3 %	10.7 %	10.7 %
Financing: Business angels and VCs	27.3 %	45.5 %	9.1 %	0.0 %	18.2 %
Total	12.6 %	19.7 %	36.7 %	24.0 %	7.1 %

6 "Technology push" and "demand pull" are alternative concepts that often characterize the orientation of innovation policies. Which of the two characterizes the Finnish national innovation policy best? Please encircle ONE option on a scale from 1 to 5, where 1=strong technology push and 5=strong demand pull.

	Strong tech-push	*Tech-push*	*In between*	*Demand-pull*	*Strong demand-pull*
Firms: Smaller innovative firms	25.2 %	47.2 %	16.8 %	9.2 %	1.7 %
Firms: Larger innovative firms	19.4 %	56.8 %	13.5 %	7.5 %	2.9 %
Firms: Other firms	19.2 %	41.0 %	23.5 %	11.3 %	5.1 %
Total	22.6 %	47.4 %	17.9 %	9.4 %	2.8 %
Gov.: Innovation support gov. orgs.	7.1 %	54.5 %	22.3 %	6.3 %	9.8 %
Gov.: Education support gov. orgs.	20.0 %	48.6 %	25.7 %	5.7 %	0.0 %
Gov.: Other ministries	9.3 %	66.4 %	14.3 %	10.0 %	0.0 %
Gov.: Other public sector orgs.	5.6 %	70.4 %	21.3 %	2.8 %	0.0 %
Total	7.5 %	67.0 %	19.9 %	5.0 %	0.7 %
Education: University department heads	28.7 %	49.5 %	15.4 %	5.9 %	0.5 %
Education: University rectors	36.4 %	54.6 %	0.0 %	9.1 %	0.0 %
Education: Polytechnic rectors	11.8 %	64.7 %	5.9 %	11.8 %	5.9 %
Associations	16.0 %	56.0 %	8.0 %	20.0 %	0.0 %
Municipalities	22.2 %	52.9 %	15.0 %	8.7 %	1.2 %
Research: Public research institutes	0.0 %	50.0 %	50.0 %	0.0 %	0.0 %
Research: Other research instititutes	14.3 %	71.4 %	14.3 %	0.0 %	0.0 %
Intermediaries: TE-centres	9.1 %	63.6 %	18.2 %	9.1 %	0.0 %
Intermediaries: Other intermediaries	21.1 %	51.3 %	21.1 %	2.6 %	4.0 %
Financing: Business angels and VCs	36.4 %	54.6 %	0.0 %	9.1 %	0.0 %
Total	23.6 %	52.3 %	15.7 %	6.9 %	1.4 %

7 In the NIS universities, polytechnics, and public research organisations have their own roles. Indicate by checking the respective boxes WHETHER the listed actors SUCCESSFULLY take care of the following tasks. Please check the options only if, in your opinion, the actor performs WELL in the respective tasks.

7a International top-class research

	Universities	*Polytechnics*	*PRO's*
Firms: Smaller innovative firms	90 %	4 %	25 %
Firms: Larger innovative firms	91 %	3 %	25 %
Firms: Other firms	84 %	6 %	26 %
Total	89 %	4 %	25 %
Gov.: Innovation support gov. orgs.	92 %	n.a.	43 %
Gov.: Education support gov. orgs.	100 %	n.a.	71 %
Gov.: Other ministries	85 %	n.a.	38 %
Gov.: Other public sector orgs.	100 %	n.a.	41 %
Total	96 %	n.a.	43 %
Education: Univ. department heads	100 %	0 %	24 %
Education: University rectors	100 %	0 %	30 %
Education: Polytechnic rectors	87 %	20 %	53 %
Associations	89 %	0 %	37 %
Municipalities	91 %	3 %	28 %
Research: Public research institutes	71 %	0 %	71 %
Research: Other research instititutes	100 %	0 %	20 %
Intermediaries: TE-centres	75 %	0 %	63 %
Intermediaries: Other intermediaries	88 %	3 %	47 %
Financing: Business angels and VCs	100 %	0 %	33 %
Total	95 %	2 %	33 %
Average	93 %	3 %	34 %

7b Research for the national needs

	Universities	*Polytechnics*	*PRO's*
Firms: Smaller innovative firms	56 %	34 %	51 %
Firms: Larger innovative firms	65 %	32 %	52 %
Firms: Other firms	60 %	34 %	43 %
Total	59 %	34 %	49 %
Gov.: Innovation support gov. orgs.	89 %	34 %	82 %
Gov.: Education support gov. orgs.	63 %	49 %	94 %
Gov.: Other ministries	55 %	12 %	85 %
Gov.: Other public sector orgs.	73 %	50 %	75 %
Total	69 %	39 %	79 %
Education: Univ. department heads	80 %	27 %	68 %
Education: University rectors	82 %	18 %	45 %
Education: Polytechnic rectors	65 %	94 %	59 %
Associations	68 %	14 %	73 %
Municipalities	65 %	43 %	62 %
Research: Public research institutes	71 %	0 %	71 %
Research: Other research instititutes	50 %	0 %	83 %
Intermediaries: TE-centres	56 %	33 %	33 %
Intermediaries: Other intermediaries	69 %	53 %	53 %
Financing: Business angels and VCs	67 %	33 %	78 %
Total	75 %	34 %	64 %
Average	68 %	36 %	64 %

7c Prod. of competence for international business activities

	Universities	*Polytechnics*	*PRO's*
Firms: Smaller innovative firms	82 %	26 %	14 %
Firms: Larger innovative firms	85 %	29 %	17 %
Firms: Other firms	83 %	27 %	11 %
Total	83 %	27 %	14 %
Gov.: Innovation support gov. orgs.	74 %	9 %	26 %
Gov.: Education support gov. orgs.	100 %	14 %	0 %
Gov.: Other ministries	52 %	33 %	48 %
Gov.: Other public sector orgs.	98 %	26 %	9 %
Total	87 %	26 %	17 %
Education: Univ. department heads	92 %	25 %	12 %
Education: University rectors	100 %	17 %	0 %
Education: Polytechnic rectors	80 %	73 %	20 %
Associations	87 %	13 %	7 %
Municipalities	86 %	28 %	14 %
Research: Public research institutes	43 %	29 %	29 %
Research: Other research instititutes	100 %	0 %	50 %
Intermediaries: TE-centres	88 %	38 %	13 %
Intermediaries: Other intermediaries	92 %	37 %	15 %
Financing: Business angels and VCs	55 %	0 %	0 %
Total	89 %	28 %	13 %
Average	86 %	27 %	15 %

7d Prod. of competence for local business activities

	Universities	*Polytechnics*	*PRO's*
Firms: Smaller innovative firms	39 %	82 %	13 %
Firms: Larger innovative firms	46 %	86 %	13 %
Firms: Other firms	35 %	78 %	12 %
Total	39 %	82 %	13 %
Gov.: Innovation support gov. orgs.	59 %	100 %	16 %
Gov.: Education support gov. orgs.	46 %	94 %	40 %
Gov.: Other ministries	40 %	74 %	26 %
Gov.: Other public sector orgs.	61 %	92 %	20 %
Total	55 %	89 %	23 %
Education: Univ. department heads	62 %	85 %	16 %
Education: University rectors	78 %	78 %	11 %
Education: Polytechnic rectors	18 %	100 %	6 %
Associations	65 %	78 %	13 %
Municipalities	41 %	89 %	16 %
Research: Public research institutes	17 %	83 %	17 %
Research: Other research instititutes	33 %	83 %	0 %
Intermediaries: TE-centres	30 %	100 %	10 %
Intermediaries: Other intermediaries	45 %	92 %	12 %
Financing: Business angels and VCs	50 %	90 %	10 %
Total	55 %	87 %	14 %
Average	50 %	86 %	16 %

8 One of the objectives of the NIS is to promote growth entrepreneurship and generate rapidly growing companies in Finland. How would you grade the system in this respect? (Scale from 4 to 10)

Firms: Smaller innovative firms	6.26
Firms: Larger innovative firms	6.41
Firms: Other firms	6.39
Total	6.35
Gov.: Innovation support gov. orgs.	6.32
Gov.: Education support gov. orgs.	6.54
Gov.: Other ministries	6.67
Gov.: Other public sector orgs.	6.16
Total	6.43
Education: University department heads	6.47
Education: University rectors	6.30
Education: Polytechnic rectors	6.82
Associations	6.16
Municipalities	6.92
Research: Public research institutes	6.43
Research: Other research instititutes	6.00
Intermediaries: TE-centres	6.50
Intermediaries: Other intermediaries	6.41
Financing: Business angels and VCs	6.27
Financing: Banks, loan officers	6.72
Total	6.45

9 Would you say the national innovation system promotes also the agendas of regional policy?

	Yes	*No*	*I don't know*
Firms: Smaller innovative firms	49.6 %	33.9 %	16.6 %
Firms: Larger innovative firms	59.8 %	24.5 %	15.7 %
Firms: Other firms	38.0 %	31.6 %	30.4 %
Total	48.6 %	31.6 %	19.8 %
Gov.: Innovation support gov. orgs.	60.7 %	39.3 %	0.0 %
Gov.: Education support gov. orgs.	94.3 %	0.0 %	5.7 %
Gov.: Other ministries	90.0 %	2.9 %	7.1 %
Gov.: Other public sector orgs.	68.1 %	18.1 %	13.9 %
Total	74.5 %	14.7 %	10.8 %
Education: University department heads	64.2 %	17.4 %	18.4 %
Education: University rectors	81.8 %	9.1 %	9.1 %
Education: Polytechnic rectors	76.5 %	23.5 %	0.0 %
Associations	84.0 %	12.0 %	4.0 %
Municipalities	45.3 %	49.9 %	4.8 %
Research: Public research institutes	57.1 %	0.0 %	42.9 %
Research: Other research instititutes	57.1 %	14.3 %	28.6 %
Intermediaries: TE-centres	36.4 %	45.5 %	18.2 %
Intermediaries: Other intermediaries	63.2 %	31.6 %	5.3 %
Financing: Business angels and VCs	81.8 %	0.0 %	18.2 %
Total	65.9 %	20.0 %	14.2 %

10 In your opinion, is the NATIONAL innovation policy equally effective in all regions of Finland?

	Yes	*No*	*I don't know*
Firms: Smaller innovative firms	6.0 %	74.3 %	19.6 %
Firms: Larger innovative firms	7.2 %	73.3 %	19.5 %
Firms: Other firms	7.4 %	60.0 %	32.6 %
Total	6.6 %	70.6 %	22.8 %
Gov.: Innovation support gov. orgs.	36.1 %	60.2 %	3.7 %
Gov.: Education support gov. orgs.	17.1 %	77.1 %	5.7 %
Gov.: Other ministries	10.0 %	66.4 %	23.6 %
Gov.: Other public sector orgs.	14.4 %	69.0 %	16.7 %
Total	14.9 %	68.3 %	16.8 %
Education: University department heads	5.9 %	69.8 %	24.3 %
Education: University rectors	0.0 %	90.9 %	9.1 %
Education: Polytechnic rectors	17.7 %	76.5 %	5.9 %
Associations	8.0 %	80.0 %	12.0 %
Municipalities	2.3 %	92.4 %	5.3 %
Research: Public research institutes	28.6 %	42.9 %	28.6 %
Research: Other research instititutes	0.0 %	71.4 %	28.6 %
Intermediaries: TE-centres	9.1 %	81.8 %	9.1 %
Intermediaries: Other intermediaries	10.7 %	82.7 %	6.7 %
Financing: Business angels and VCs	27.3 %	54.6 %	18.2 %
Total	7.0 %	77.3 %	15.8 %

11 How important are NATIONAL networks for the activities of your organisation?

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	2.3 %	16.3 %	41.2 %	39.9 %	0.4 %
Firms: Larger innovative firms	1.2 %	17.1 %	40.5 %	41.2 %	0.0 %
Firms: Other firms	4.8 %	26.5 %	44.8 %	19.1 %	4.9 %
Total	2.7 %	19.0 %	41.9 %	35.0 %	1.4 %
Gov.: Innovation support gov. orgs.	0.0 %	9.8 %	10.7 %	79.5 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	5.7 %	94.3 %	0.0 %
Gov.: Other ministries	0.0 %	6.4 %	25.0 %	68.6 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	0.0 %	19.4 %	80.6 %	0.0 %
Total	0.0 %	2.3 %	19.4 %	78.4 %	0.0 %
Education: University department heads	0.5 %	5.4 %	37.3 %	56.9 %	0.0 %
Education: University rectors	0.0 %	0.0 %	45.5 %	54.6 %	0.0 %
Education: Polytechnic rectors	0.0 %	0.0 %	11.8 %	88.2 %	0.0 %
Associations	4.0 %	4.0 %	12.0 %	80.0 %	0.0 %
Municipalities	1.1 %	9.9 %	51.0 %	38.0 %	0.0 %
Research: Public research institutes	0.0 %	0.0 %	42.9 %	57.1 %	0.0 %
Research: Other research instititutes	0.0 %	0.0 %	57.1 %	42.9 %	0.0 %
Intermediaries: TE-centres	0.0 %	0.0 %	18.2 %	81.8 %	0.0 %
Intermediaries: Other intermediaries	0.0 %	7.9 %	17.1 %	73.7 %	1.3 %
Financing: Business angels and VCs	0.0 %	0.0 %	63.6 %	36.4 %	0.0 %
Total	0.5 %	4.9 %	31.2 %	63.1 %	0.3 %

12 How important are INTERNATIONAL networks for the activities of your organisation?

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Firms: Smaller innovative firms	9.8 %	29.3 %	34.5 %	25.1 %	1.4 %
Firms: Larger innovative firms	8.2 %	22.3 %	34.3 %	34.7 %	0.5 %
Firms: Other firms	29.3 %	32.5 %	22.9 %	11.1 %	4.2 %
Total	14.3 %	28.8 %	31.6 %	23.4 %	1.9 %
Gov.: Innovation support gov. orgs.	0.0 %	9.8 %	24.1 %	66.1 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	22.9 %	77.1 %	0.0 %
Gov.: Other ministries	0.0 %	6.4 %	12.9 %	80.7 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	6.9 %	46.8 %	46.3 %	0.0 %
Total	0.0 %	6.6 %	35.5 %	57.9 %	0.0 %
Education: University department heads	0.0 %	1.5 %	24.0 %	74.5 %	0.0 %
Education: University rectors	0.0 %	0.0 %	18.2 %	81.8 %	0.0 %
Education: Polytechnic rectors	0.0 %	5.9 %	29.4 %	64.7 %	0.0 %
Associations	4.0 %	4.0 %	36.0 %	56.0 %	0.0 %
Municipalities	18.4 %	49.1 %	24.1 %	8.4 %	0.0 %
Research: Public research institutes	0.0 %	0.0 %	42.9 %	57.1 %	0.0 %
Research: Other research instititutes	0.0 %	0.0 %	42.9 %	57.1 %	0.0 %
Intermediaries: TE-centres	0.0 %	9.1 %	72.7 %	18.2 %	0.0 %
Intermediaries: Other intermediaries	1.3 %	26.3 %	32.9 %	38.2 %	1.3 %
Financing: Business angels and VCs	0.0 %	9.1 %	9.1 %	81.8 %	0.0 %
Total	0.5 %	7.3 %	28.5 %	63.4 %	0.3 %

13 What do you think about the following statements? Please choose ONE alternative for each reform.

13a ...internationalization.

	Completely disagree	*Somewhat disagree*	*Somewhat agree*	*Completely agree*	*I don't know*
Firms: Smaller innovative firms	3.5 %	9.0 %	44.3 %	18.1 %	25.2 %
Firms: Larger innovative firms	2.6 %	11.2 %	40.2 %	21.9 %	24.2 %
Firms: Other firms	2.8 %	9.9 %	38.3 %	18.4 %	30.6 %
Total	3.2 %	9.6 %	42.1 %	18.9 %	26.2 %
Gov.: Innovation support gov. orgs.	6.5 %	0.0 %	38.0 %	55.6 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	48.6 %	37.1 %	14.3 %
Gov.: Other ministries	0.0 %	7.1 %	44.3 %	20.7 %	27.9 %
Gov.: Other public sector orgs.	0.0 %	0.0 %	53.2 %	35.2 %	11.6 %
Total	0.4 %	1.7 %	49.7 %	33.1 %	14.9 %
Education: University department heads	8.4 %	19.2 %	37.4 %	21.2 %	13.8 %
Education: University rectors	9.1 %	0.0 %	45.5 %	45.5 %	0.0 %
Education: Polytechnic rectors	12.5 %	0.0 %	50.0 %	37.5 %	0.0 %
Associations	3.9 %	0.0 %	57.7 %	34.6 %	3.9 %
Municipalities	4.8 %	5.8 %	54.4 %	25.7 %	9.3 %
Research: Public research institutes	0.0 %	0.0 %	57.1 %	14.3 %	28.6 %
Research: Other research instititutes	0.0 %	14.3 %	57.1 %	14.3 %	14.3 %
Intermediaries: TE-centres	0.0 %	9.1 %	54.6 %	36.4 %	0.0 %
Intermediaries: Other intermediaries	1.4 %	13.7 %	37.0 %	28.8 %	19.2 %
Financing: Business angels and VCs	0.0 %	9.1 %	18.2 %	63.6 %	9.1 %
Total	6.0 %	14.3 %	40.3 %	26.6 %	12.9 %

13b ...quality of teaching.

	Completely disagree	*Somewhat disagree*	*Somewhat agree*	*Completely agree*	*I don't know*
Firms: Smaller innovative firms	3.2 %	16.7 %	41.7 %	14.3 %	24.2 %
Firms: Larger innovative firms	4.0 %	16.3 %	38.5 %	17.1 %	24.0 %
Firms: Other firms	6.3 %	15.4 %	32.9 %	13.7 %	31.7 %
Total	4.1 %	16.3 %	39.0 %	14.7 %	25.9 %
Gov.: Innovation support gov. orgs.	0.0 %	0.0 %	43.8 %	52.7 %	3.6 %
Gov.: Education support gov. orgs.	0.0 %	14.3 %	54.3 %	31.4 %	0.0 %
Gov.: Other ministries	0.0 %	20.7 %	44.3 %	17.9 %	17.1 %
Gov.: Other public sector orgs.	0.0 %	7.4 %	51.4 %	22.7 %	18.5 %
Total	0.0 %	10.6 %	49.3 %	24.1 %	16.0 %
Education: University department heads	14.2 %	29.3 %	33.7 %	9.3 %	13.7 %
Education: University rectors	0.0 %	9.1 %	54.6 %	36.4 %	0.0 %
Education: Polytechnic rectors	5.9 %	23.5 %	35.3 %	29.4 %	5.9 %
Associations	3.9 %	15.4 %	50.0 %	30.8 %	0.0 %
Municipalities	4.4 %	13.3 %	55.1 %	19.8 %	7.3 %
Research: Public research institutes	0.0 %	0.0 %	57.1 %	0.0 %	42.9 %
Research: Other research instititutes	0.0 %	14.3 %	71.4 %	0.0 %	14.3 %
Intermediaries: TE-centres	0.0 %	0.0 %	81.8 %	9.1 %	9.1 %
Intermediaries: Other intermediaries	2.6 %	18.4 %	40.8 %	17.1 %	21.1 %
Financing: Business angels and VCs	0.0 %	9.1 %	45.5 %	36.4 %	9.1 %
Total	8.9 %	22.9 %	39.9 %	14.6 %	13.8 %

13c ...quality of research.

	Completely disagree	*Somewhat disagree*	*Somewhat agree*	*Completely agree*	*I don't know*
Firms: Smaller innovative firms	4.0 %	13.0 %	38.8 %	19.7 %	24.6 %
Firms: Larger innovative firms	4.0 %	15.7 %	36.7 %	19.9 %	23.7 %
Firms: Other firms	5.1 %	13.5 %	32.7 %	16.8 %	32.0 %
Total	4.2 %	13.6 %	36.9 %	19.0 %	26.2 %
Gov.: Innovation support gov. orgs.	6.3 %	0.0 %	33.0 %	57.1 %	3.6 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	77.1 %	22.9 %	0.0 %
Gov.: Other ministries	0.0 %	20.7 %	39.3 %	22.9 %	17.1 %
Gov.: Other public sector orgs.	0.0 %	13.0 %	45.8 %	28.2 %	13.0 %
Total	0.4 %	13.2 %	45.3 %	28.6 %	12.5 %
Education: University department heads	13.0 %	23.0 %	34.0 %	17.5 %	12.5 %
Education: University rectors	9.1 %	0.0 %	27.3 %	63.6 %	0.0 %
Education: Polytechnic rectors	5.9 %	11.8 %	52.9 %	29.4 %	0.0 %
Associations	4.0 %	12.0 %	36.0 %	48.0 %	0.0 %
Municipalities	2.4 %	12.6 %	50.1 %	26.9 %	8.0 %
Research: Public research institutes	0.0 %	14.3 %	57.1 %	0.0 %	28.6 %
Research: Other research instititutes	0.0 %	14.3 %	42.9 %	28.6 %	14.3 %
Intermediaries: TE-centres	0.0 %	0.0 %	81.8 %	18.2 %	0.0 %
Intermediaries: Other intermediaries	1.3 %	17.1 %	43.4 %	19.7 %	18.4 %
Financing: Business angels and VCs	0.0 %	9.1 %	36.4 %	45.5 %	9.1 %
Total	8.2 %	18.4 %	38.9 %	22.7 %	11.8 %

13d ...societal impact.

	Completely disagree	*Somewhat disagree*	*Somewhat agree*	*Completely agree*	*I don't know*
Firms: Smaller innovative firms	4.4 %	16.6 %	35.2 %	20.0 %	23.8 %
Firms: Larger innovative firms	6.0 %	15.3 %	31.6 %	21.0 %	26.2 %
Firms: Other firms	4.0 %	11.6 %	38.1 %	15.6 %	30.8 %
Total	4.6 %	15.1 %	35.2 %	19.2 %	25.9 %
Gov.: Innovation support gov. orgs.	0.0 %	6.3 %	17.0 %	67.0 %	9.8 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	37.1 %	62.9 %	0.0 %
Gov.: Other ministries	0.0 %	17.9 %	36.4 %	31.4 %	14.3 %
Gov.: Other public sector orgs.	0.0 %	5.9 %	54.9 %	29.4 %	9.8 %
Total	0.0 %	8.6 %	46.4 %	34.7 %	10.3 %
Education: University department heads	11.0 %	17.4 %	42.3 %	16.9 %	12.4 %
Education: University rectors	0.0 %	9.1 %	27.3 %	63.6 %	0.0 %
Education: Polytechnic rectors	6.3 %	18.8 %	43.8 %	31.3 %	0.0 %
Associations	0.0 %	19.2 %	34.6 %	42.3 %	3.9 %
Municipalities	2.3 %	23.8 %	32.4 %	27.4 %	14.3 %
Research: Public research institutes	0.0 %	0.0 %	66.7 %	16.7 %	16.7 %
Research: Other research instititutes	0.0 %	14.3 %	57.1 %	0.0 %	28.6 %
Intermediaries: TE-centres	9.1 %	0.0 %	54.6 %	27.3 %	9.1 %
Intermediaries: Other intermediaries	5.5 %	20.6 %	35.6 %	23.3 %	15.1 %
Financing: Business angels and VCs	0.0 %	0.0 %	54.6 %	36.4 %	9.1 %
Total	7.7 %	16.6 %	41.4 %	22.7 %	11.6 %

13e The centres of strategic excellence (SHOK) enhance the system's performance.

	Completely disagree	*Somewhat disagree*	*Somewhat agree*	*Completely agree*	*I don't know*
Firms: Smaller innovative firms	3.2 %	11.3 %	39.7 %	20.0 %	25.8 %
Firms: Larger innovative firms	3.4 %	10.0 %	46.4 %	21.6 %	18.6 %
Firms: Other firms	2.3 %	7.3 %	42.1 %	12.8 %	35.6 %
Total	3.0 %	10.1 %	41.5 %	18.6 %	26.8 %
Gov.: Innovation support gov. orgs.	0.0 %	13.4 %	41.1 %	42.0 %	3.6 %
Gov.: Education support gov. orgs.	0.0 %	5.7 %	28.6 %	65.7 %	0.0 %
Gov.: Other ministries	3.7 %	0.0 %	65.9 %	24.4 %	5.9 %
Gov.: Other public sector orgs.	1.4 %	16.7 %	9.7 %	54.2 %	18.1 %
Total	1.8 %	11.8 %	26.4 %	47.0 %	13.1 %
Education: University department heads	12.4 %	32.7 %	30.7 %	3.5 %	20.8 %
Education: University rectors	0.0 %	36.4 %	36.4 %	18.2 %	9.1 %
Education: Polytechnic rectors	5.9 %	17.7 %	47.1 %	23.5 %	5.9 %
Associations	0.0 %	23.1 %	34.6 %	38.5 %	3.9 %
Municipalities	4.6 %	12.4 %	37.3 %	33.4 %	12.3 %
Research: Public research institutes	0.0 %	28.6 %	28.6 %	42.9 %	0.0 %
Research: Other research instititutes	0.0 %	28.6 %	28.6 %	28.6 %	14.3 %
Intermediaries: TE-centres	0.0 %	27.3 %	45.5 %	18.2 %	9.1 %
Intermediaries: Other intermediaries	5.3 %	17.1 %	51.3 %	14.5 %	11.8 %
Financing: Business angels and VCs	9.1 %	0.0 %	63.6 %	27.3 %	0.0 %
Total	8.4 %	26.9 %	37.5 %	12.0 %	15.2 %

13f The possible reform of publicly funded research organisations would enhance the system's performance.

	Completely disagree	*Somewhat disagree*	*Somewhat agree*	*Completely agree*	*I don't know*
Firms: Smaller innovative firms	2.8 %	7.8 %	34.1 %	15.3 %	40.1 %
Firms: Larger innovative firms	2.6 %	6.5 %	38.6 %	12.6 %	39.7 %
Firms: Other firms	1.6 %	8.2 %	34.7 %	9.0 %	46.6 %
Total	2.5 %	7.7 %	35.1 %	13.3 %	41.5 %
Gov.: Innovation support gov. orgs.	0.0 %	11.1 %	31.5 %	57.4 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	5.7 %	37.1 %	42.9 %	14.3 %
Gov.: Other ministries	0.0 %	24.3 %	59.3 %	16.4 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	0.0 %	37.3 %	35.3 %	27.5 %
Total	0.0 %	7.3 %	42.4 %	32.5 %	17.8 %
Education: University department heads	5.0 %	7.5 %	35.8 %	18.4 %	33.3 %
Education: University rectors	0.0 %	9.1 %	36.4 %	45.5 %	9.1 %
Education: Polytechnic rectors	0.0 %	0.0 %	52.9 %	35.3 %	11.8 %
Associations	0.0 %	11.5 %	38.5 %	42.3 %	7.7 %
Municipalities	5.0 %	10.4 %	41.0 %	24.3 %	19.2 %
Research: Public research institutes	14.3 %	14.3 %	42.9 %	14.3 %	14.3 %
Research: Other research instititutes	0.0 %	0.0 %	71.4 %	28.6 %	0.0 %
Intermediaries: TE-centres	0.0 %	9.1 %	27.3 %	45.5 %	18.2 %
Intermediaries: Other intermediaries	1.3 %	5.3 %	42.1 %	26.3 %	25.0 %
Financing: Business angels and VCs	0.0 %	0.0 %	20.0 %	30.0 %	50.0 %
Total	3.3 %	6.8 %	38.3 %	24.6 %	27.1 %

13g The reform of the University Inventions Act will enhance the co-operation between companies, universities and polytechnics.

	Completely disagree	*Somewhat disagree*	*Somewhat agree*	*Completely agree*	*I don't know*
Firms: Smaller innovative firms	3.3 %	6.6 %	32.9 %	16.6 %	40.7 %
Firms: Larger innovative firms	2.7 %	7.1 %	33.3 %	11.7 %	45.2 %
Firms: Other firms	0.6 %	8.2 %	34.7 %	13.0 %	43.5 %
Total	2.5 %	7.0 %	33.4 %	14.9 %	42.2 %
Gov.: Innovation support gov. orgs.	3.6 %	6.3 %	54.5 %	28.6 %	7.1 %
Gov.: Education support gov. orgs.	0.0 %	20.0 %	54.3 %	5.7 %	20.0 %
Gov.: Other ministries	0.0 %	3.6 %	49.3 %	10.0 %	37.1 %
Gov.: Other public sector orgs.	5.6 %	11.1 %	28.7 %	27.8 %	26.9 %
Total	3.7 %	9.5 %	37.1 %	22.2 %	27.6 %
Education: University department heads	4.4 %	15.3 %	35.0 %	7.4 %	37.9 %
Education: University rectors	9.1 %	0.0 %	45.5 %	27.3 %	18.2 %
Education: Polytechnic rectors	0.0 %	11.8 %	29.4 %	52.9 %	5.9 %
Associations	3.9 %	3.9 %	30.8 %	19.2 %	42.3 %
Municipalities	2.2 %	3.7 %	43.6 %	18.7 %	31.7 %
Research: Public research institutes	0.0 %	0.0 %	28.6 %	42.9 %	28.6 %
Research: Other research instititutes	0.0 %	0.0 %	42.9 %	14.3 %	42.9 %
Intermediaries: TE-centres	0.0 %	0.0 %	72.7 %	27.3 %	0.0 %
Intermediaries: Other intermediaries	2.7 %	13.3 %	34.7 %	10.7 %	38.7 %
Financing: Business angels and VCs	0.0 %	0.0 %	36.4 %	18.2 %	45.5 %
Total	3.5 %	12.0 %	35.9 %	13.3 %	35.3 %

COMPANIES

14 What is your primary source of earnings?

	Consumers	*Governmental or communal*	*Private companies or societes*	*I don't know*
Smaller innovative firms	12.7 %	9.9 %	76.6 %	0.9 %
Larger innovative firms	20.5 %	7.4 %	71.6 %	0.5 %
Other firms	23.8 %	7.6 %	67.1 %	1.5 %
Total	16.8 %	8.9 %	73.4 %	0.9 %

15 What is your company's primary position in the distribution chain?

	Main supplier	*System supplier*	*Supplier*	*I don't know*
Smaller innovative firms	49.0 %	21.6 %	27.7 %	1.8 %
Larger innovative firms	57.5 %	15.7 %	24.9 %	1.9 %
Other firms	41.6 %	18.4 %	36.0 %	4.0 %
Total	48.8 %	19.7 %	29.2 %	2.3 %

16 How important are the following aspects from the perspective of your operations?

16a A generally positive attitude towards risk taking in society

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	2.0 %	11.0 %	47.2 %	39.5 %	0.4 %
Larger innovative firms	1.7 %	16.9 %	49.9 %	29.5 %	2.0 %
Other firms	3.6 %	24.0 %	45.5 %	19.7 %	7.2 %
Total	2.3 %	15.1 %	47.3 %	33.0 %	2.3 %

16b The availability of risk financing

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	9.1 %	25.4 %	31.1 %	33.8 %	0.6 %
Larger innovative firms	8.7 %	30.3 %	30.5 %	27.2 %	3.4 %
Other firms	17.5 %	32.9 %	26.5 %	15.9 %	7.3 %
Total	10.9 %	28.1 %	29.9 %	28.4 %	2.7 %

16c A motivating company and capital taxation scheme

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	1.4 %	7.3 %	28.3 %	62.7 %	0.3 %
Larger innovative firms	4.0 %	10.8 %	32.6 %	51.2 %	1.4 %
Other firms	3.5 %	8.7 %	31.9 %	47.0 %	8.8 %
Total	2.4 %	8.3 %	29.9 %	56.9 %	2.5 %

16d The convenience of public administrative procedures

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	0.6 %	11.7 %	34.2 %	52.5 %	1.0 %
Larger innovative firms	2.2 %	9.9 %	41.3 %	44.6 %	2.0 %
Other firms	0.0 %	14.0 %	39.0 %	38.6 %	8.4 %
Total	0.8 %	11.9 %	36.7 %	47.8 %	2.9 %

16e Guidance and information provided by the public sector

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	6.6 %	30.9 %	38.7 %	23.3 %	0.6 %
Larger innovative firms	5.3 %	37.6 %	39.5 %	15.7 %	1.9 %
Other firms	5.4 %	28.5 %	44.1 %	14.6 %	7.5 %
Total	6.1 %	31.6 %	40.1 %	19.8 %	2.5 %

16f Financial support provided by the public sector

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	10.0 %	30.1 %	28.1 %	30.5 %	1.3 %
Larger innovative firms	9.7 %	35.0 %	36.8 %	16.1 %	2.4 %
Other firms	16.3 %	34.2 %	26.1 %	16.2 %	7.2 %
Total	11.4 %	32.0 %	29.3 %	24.5 %	2.8 %

16g The readiness of universities and polytechnics to cooperate

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	5.7 %	25.6 %	40.1 %	26.8 %	1.8 %
Larger innovative firms	3.9 %	19.1 %	44.4 %	31.4 %	1.3 %
Other firms	8.9 %	39.5 %	35.8 %	7.0 %	8.9 %
Total	6.1 %	27.6 %	39.9 %	23.1 %	3.3 %

17 One of the most central functions of the system is to facilitate PRIVATE business and innovation activities. Against this backdrop, how would you characterize the innovation system as a whole?

	Very simple	*Fairly simple*	*Fairly complex*	*Very complex*	*I dont' know*
Firms: Smaller innovative firms	0.4 %	14.2 %	58.4 %	13.1 %	13.9 %
Firms: Larger innovative firms	0.3 %	15.2 %	59.3 %	13.1 %	12.2 %
Firms: Other firms	1.2 %	15.7 %	47.0 %	7.1 %	29.0 %
Gov.: Innovation support gov. orgs.	4.8 %	9.5 %	71.4 %	14.3 %	0.0 %
Gov.: Education support gov. orgs.	0.0 %	16.7 %	58.3 %	16.7 %	8.3 %
Gov.: Other ministries	0.0 %	5.3 %	79.0 %	0.0 %	15.8 %
Gov.: Other public sector orgs.	0.0 %	12.5 %	70.8 %	12.5 %	4.2 %
Intermediaries: TE-centres	0.0 %	9.1 %	45.5 %	45.5 %	0.0 %
Intermediaries: Other intermediaries	2.6 %	7.9 %	59.2 %	27.6 %	2.6 %
Financing: Business angels and VCs	0.0 %	9.1 %	54.6 %	36.4 %	0.0 %
Financing: Banks, loan officers	0.0 %	0.0 %	23.1 %	7.6 %	69.2 %

18 The emergence of new growth companies could be facilitated by providing them with tax incentives regarding their future earnings and profit sharing. How efficient are such tax incentives in increasing the number of growth companies?

	Not at all efficient	*Not very efficient*	*Rather efficient*	*Very efficient*	*I don't know*
Firms: Smaller innovative firms	3.8 %	28.3 %	42.4 %	21.7 %	3.9 %
Firms: Larger innovative firms	4.0 %	30.1 %	40.1 %	17.3 %	8.5 %
Firms: Other firms	3.8 %	25.6 %	46.5 %	14.8 %	9.4 %
Total	3.8 %	28.0 %	42.9 %	19.3 %	6.0 %
Financing: Business angels and VCs	0.0 %	30.8 %	53.9 %	7.7 %	7.7 %
Financing: Banks, loan officers	18.2 %	0.0 %	18.2 %	63.6 %	0.0 %
Total	9.1 %	15.4 %	36.0 %	35.7 %	3.8 %

19 Has your company engaged in innovation activities in the last three years?

	Yes	*No*	*I don't know*
Total	77.5 %	19.1 %	3.4 %
Smaller innovative firms (n=485) / *Larger innovative firms (n=215)*		*Other firms (n=326)*	

20 How important are the following DOMESTIC actors from the perspective of your company's innovation activities?

20a Employees of your company/corporation

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	0.2 %	2.1 %	10.8 %	86.2 %	0.8 %
Larger innovative firms	0.0 %	1.7 %	9.9 %	88.0 %	0.5 %
Total	0.2 %	2.1 %	10.5 %	86.6 %	0.7 %

20b Device and materials suppliers

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	7.2 %	21.0 %	48.7 %	22.0 %	1.2 %
Larger innovative firms	3.4 %	18.9 %	54.6 %	22.7 %	0.5 %
Total	6.4 %	20.5 %	50.1 %	22.0 %	1.0 %

20c Client companies

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	1.5 %	7.0 %	28.8 %	62.0 %	0.8 %
Larger innovative firms	1.3 %	10.8 %	33.0 %	51.9 %	3.0 %
Total	1.4 %	8.1 %	29.8 %	59.3 %	1.3 %

20d Consumers / end users

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	8.2 %	20.0 %	29.9 %	40.2 %	1.8 %
Larger innovative firms	6.5 %	25.8 %	32.2 %	33.1 %	2.4 %
Total	7.9 %	21.5 %	30.3 %	38.4 %	1.9 %

20e Municipalities or the government

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	22.8 %	39.1 %	23.0 %	13.4 %	1.7 %
Larger innovative firms	23.9 %	43.7 %	21.9 %	7.8 %	2.8 %
Total	22.9 %	40.3 %	22.9 %	12.0 %	1.9 %

20f Competitors

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	8.4 %	28.3 %	47.5 %	14.7 %	1.3 %
Larger innovative firms	4.2 %	32.0 %	48.2 %	14.5 %	1.1 %
Total	7.5 %	29.3 %	47.4 %	14.7 %	1.2 %

20g Consultants / consulting agencies

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	25.1 %	39.8 %	25.2 %	8.4 %	1.6 %
Larger innovative firms	16.6 %	49.3 %	27.0 %	4.3 %	2.8 %
Total	23.0 %	42.1 %	25.7 %	7.4 %	1.8 %

20h Private research organisations

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	21.3 %	45.1 %	25.2 %	5.4 %	3.0 %
Larger innovative firms	11.8 %	50.3 %	29.3 %	5.8 %	2.9 %
Total	19.0 %	46.4 %	26.2 %	5.5 %	2.9 %

20i Public research organisations

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	17.9 %	37.0 %	32.8 %	9.7 %	2.7 %
Larger innovative firms	10.6 %	40.4 %	38.7 %	7.9 %	2.5 %
Total	16.2 %	37.7 %	34.3 %	9.2 %	2.6 %

20j Universities

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	11.3 %	33.8 %	35.6 %	16.6 %	2.6 %
Larger innovative firms	5.2 %	30.3 %	40.2 %	22.5 %	1.8 %
Total	9.8 %	33.1 %	36.7 %	18.0 %	2.4 %

20k Polytechnics

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	17.7 %	34.3 %	33.9 %	11.6 %	2.5 %
Larger innovative firms	11.9 %	33.1 %	43.1 %	9.9 %	1.9 %
Total	16.5 %	34.0 %	35.9 %	11.2 %	2.3 %

21 How important are the following OVERSEAS actors from the perspective of your company's innovation activities?

21a Employees of your company/corporation

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	33.0 %	9.6 %	12.0 %	25.7 %	19.7 %
Larger innovative firms	19.3 %	12.6 %	19.7 %	35.4 %	13.0 %
Total	29.5 %	10.4 %	13.9 %	28.0 %	18.3 %

21b Device and materials suppliers

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	14.5 %	17.2 %	36.9 %	23.8 %	7.7 %
Larger innovative firms	10.4 %	17.1 %	43.5 %	22.4 %	6.7 %
Total	13.4 %	17.2 %	38.3 %	23.3 %	7.7 %

21c Client companies

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	13.5 %	15.2 %	30.3 %	31.4 %	9.6 %
Larger innovative firms	11.2 %	13.0 %	23.9 %	41.3 %	10.5 %
Total	12.9 %	14.8 %	28.6 %	33.7 %	10.1 %

21d Consumers / end users

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	25.7 %	19.8 %	22.7 %	21.1 %	10.7 %
Larger innovative firms	18.1 %	26.6 %	23.8 %	20.9 %	10.6 %
Total	23.7 %	21.5 %	22.8 %	21.1 %	10.9 %

21e Municipalities or the government

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	46.3 %	29.8 %	9.3 %	2.8 %	11.8 %
Larger innovative firms	43.0 %	34.9 %	9.7 %	1.8 %	10.6 %
Total	45.3 %	31.1 %	9.3 %	2.5 %	11.7 %

21f Competitors

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	18.8 %	25.8 %	34.6 %	12.9 %	8.0 %
Larger innovative firms	12.8 %	24.6 %	40.3 %	14.9 %	7.4 %
Total	17.2 %	25.5 %	35.9 %	13.3 %	8.1 %

21g Consultants / consulting agencies

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	40.2 %	31.3 %	13.6 %	5.0 %	9.9 %
Larger innovative firms	30.7 %	37.5 %	18.6 %	2.2 %	11.0 %
Total	37.7 %	32.8 %	14.8 %	4.3 %	10.4 %

21h Private research organisations

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	37.8 %	30.5 %	15.1 %	4.5 %	12.1 %
Larger innovative firms	31.6 %	37.0 %	19.4 %	0.9 %	11.1 %
Total	36.1 %	32.1 %	16.1 %	3.6 %	12.1 %

21i Public research organisations

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	39.0 %	28.5 %	16.6 %	3.4 %	12.5 %
Larger innovative firms	33.0 %	31.5 %	20.7 %	3.4 %	11.4 %
Total	37.3 %	29.3 %	17.6 %	3.4 %	12.4 %

21j Universities

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	32.9 %	27.8 %	19.9 %	7.9 %	11.5 %
Larger innovative firms	28.0 %	34.4 %	22.5 %	6.2 %	8.9 %
Total	31.6 %	29.5 %	20.5 %	7.4 %	11.1 %

21k Polytechnics

	Not at all important	*Not very important*	*Rather important*	*Very important*	*I don't know*
Smaller innovative firms	46.5 %	27.7 %	10.9 %	1.8 %	13.0 %
Larger innovative firms	40.4 %	28.5 %	17.2 %	0.5 %	13.4 %
Total	44.8 %	28.0 %	12.4 %	1.5 %	13.3 %

22 Which of the following statements portray the role of end users in your innovation activities?

22a They have no significant role

	Yes	*No*
Smaller innovative firms	16.1 %	83.9 %
Larger innovative firms	18.2 %	81.8 %
Total	16.7 %	83.3 %

22b They are subjects to frequent market studies (e.g. customer surveys)

	Yes	*No*
Smaller innovative firms	35.0 %	65.0 %
Larger innovative firms	46.9 %	53.1 %
Total	37.8 %	62.2 %

22c They provide active and frequent updates on the changes in their needs.

	Yes	*No*
Smaller innovative firms	52.1 %	48.0 %
Larger innovative firms	45.1 %	54.9 %
Total	50.5 %	49.5 %

22d They participate in the actual innovation activities.

	Yes	*No*
Smaller innovative firms	27.2 %	72.8 %
Larger innovative firms	19.9 %	80.1 %
Total	25.4 %	74.6 %

23 Has any of your company's investment-, R&D-, marketing-, or any other type of project been deferred or cancelled due to the global financial crisis?

	Yes	*No*	*I don't know*
Firms: Smaller innovative firms	38 %	60 %	1.6 %
Firms: Larger innovative firms	43 %	52 %	5.3 %
Firms: Other firms	19 %	75 %	6.2 %
Total	35 %	62 %	3.4 %

PUBLIC ACTORS AND INTERMEDIARIES

14 Which of the following services does your ORGANIZATION provide to other actors of the Finnish national innovation system?

14a Financing (subsidies, grants, loans, guarantees, or capital investments)

	Yes	*No*
Gov.: Innovation support gov. orgs.	92.0 %	8.0 %
Gov.: Education support gov. orgs.	62.9 %	37.1 %
Gov.: Other ministries	50.9 %	49.2 %
Gov.: Other public sector orgs.	34.7 %	65.3 %
Intermediaries: TE-centres	100.0 %	0.0 %
Intermediaries: Other intermediaries	21.3 %	78.7 %

14b Information services

	Yes	*No*
Gov.: Innovation support gov. orgs.	80.0 %	20.0 %
Gov.: Education support gov. orgs.	48.6 %	51.4 %
Gov.: Other ministries	62.7 %	37.3 %
Gov.: Other public sector orgs.	59.2 %	40.8 %
Intermediaries: TE-centres	90.9 %	9.1 %
Intermediaries: Other intermediaries	94.7 %	5.3 %

14c Promotion of international labor mobility

	Yes	*No*
Gov.: Innovation support gov. orgs.	50.0 %	50.0 %
Gov.: Education support gov. orgs.	65.7 %	34.3 %
Gov.: Other ministries	38.1 %	61.9 %
Gov.: Other public sector orgs.	28.6 %	71.4 %
Intermediaries: TE-centres	63.6 %	36.4 %
Intermediaries: Other intermediaries	16.0 %	84.0 %

14d Internationalization of companies

	Yes	*No*
Gov.: Innovation support gov. orgs.	62.0 %	38.0 %
Gov.: Education support gov. orgs.	5.7 %	94.3 %
Gov.: Other ministries	4.2 %	95.8 %
Gov.: Other public sector orgs.	51.0 %	49.0 %
Intermediaries: TE-centres	81.8 %	18.2 %
Intermediaries: Other intermediaries	76.0 %	24.0 %

14e Research- and education services

	Yes	*No*
Gov.: Innovation support gov. orgs.	23.0 %	77.0 %
Gov.: Education support gov. orgs.	45.7 %	54.3 %
Gov.: Other ministries	3.4 %	96.6 %
Gov.: Other public sector orgs.	38.8 %	61.2 %
Intermediaries: TE-centres	54.6 %	45.5 %
Intermediaries: Other intermediaries	52.0 %	48.0 %

14f Facilities

	Yes	*No*
Intermediaries: TE-centres	0.0 %	100.0 %
Intermediaries: Other intermediaries	49.3 %	50.7 %

15 Would you say that other PUBLIC actors provide similar services than your organization?

	Yes	*No*	*I don't know*
Gov.: Innovation support gov. orgs.	67.31 %	28.85 %	3.85 %
Gov.: Education support gov. orgs.	34.29 %	65.71 %	0.00 %
Gov.: Other ministries	39.71 %	20.59 %	39.71 %
Gov.: Other public sector orgs.	46.27 %	47.76 %	5.97 %
Total	45.29 %	40.82 %	13.89 %
Intermediaries: TE-centres	72.73 %	18.18 %	9.09 %
Intermediaries: Other intermediaries	69.33 %	26.67 %	4.00 %
Total	69.77 %	25.58 %	4.65 %

16 Would you say that other PRIVATE actors provide similar services than your organization?

	Yes	*No*	*I don't know*
Gov.: Innovation support gov. orgs.	25.00 %	75.00 %	0.00 %
Gov.: Education support gov. orgs.	11.43 %	88.57 %	0.00 %
Gov.: Other ministries	10.29 %	50.00 %	39.71 %
Gov.: Other public sector orgs.	47.76 %	41.79 %	10.45 %
Total	34.48 %	49.13 %	16.39 %
Intermediaries: TE-centres	27.27 %	63.64 %	9.09 %
Intermediaries: Other intermediaries	40.79 %	52.63 %	6.58 %
Total	39.08 %	54.02 %	6.90 %

17 Would you say that the co-operation between service providers is effortless?

	Yes	*No*	*I don't know*
Gov.: Innovation support gov. orgs.	47.2 %	41.7 %	11.1 %
Gov.: Education support gov. orgs.	82.9 %	11.4 %	5.7 %
Gov.: Other ministries	22.1 %	17.7 %	60.3 %
Gov.: Other public sector orgs.	83.1 %	9.5 %	7.5 %
Total	65.3 %	13.9 %	20.8 %
Intermediaries: TE-centres	100.0 %	0.0 %	0.0 %
Intermediaries: Other intermediaries	55.3 %	39.5 %	5.3 %
Total	60.5 %	34.9 %	4.7 %

18-19 Which service provider is the co-operation especially EFFORTLESS/CHALLENGING with?

Open field

20 How many person work-years were carried out in

Gov.: Innovation support gov. orgs.	341.57
Gov.: Education support gov. orgs.	152.80
Gov.: Other ministries	291.50
Gov.: Other public sector orgs.	59.61
Intermediaries: TE-centres	167.64
Intermediaries: Other intermediaries	23.26

21 How many person work-years were carried out in the foreign departments of your organization in year 2008?

Gov.: Innovation support gov. orgs.	14.35
Gov.: Education support gov. orgs.	1.73
Gov.: Other ministries	6.25
Gov.: Other public sector orgs.	20.79
Intermediaries: TE-centres	0.00
Intermediaries: Other intermediaries	0.89

22 How many person work-years used for innovation activities and/or to promote it in 2008?

Gov.: Innovation support gov. orgs.	226.43
Gov.: Education support gov. orgs.	61.27
Gov.: Other ministries	8.75
Gov.: Other public sector orgs.	10.08
Intermediaries: TE-centres	14.64
Intermediaries: Other intermediaries	10.80

23 What share of your DOMESTIC personnel has a UNIVERSITY degree?

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*	*I don't know*
Gov.: Innovation support gov. orgs.	0.0 %	0.0 %	0.0 %	67.1 %	9.4 %	23.5 %
Gov.: Education support gov. orgs.	0.0 %	0.0 %	15.2 %	54.6 %	30.3 %	0.0 %
Gov.: Other ministries	0.0 %	0.0 %	31.3 %	46.9 %	14.8 %	7.0 %
Gov.: Other public sector orgs.	0.0 %	6.0 %	0.0 %	27.9 %	49.3 %	16.9 %
Total	0.0 %	3.8 %	8.6 %	36.4 %	37.4 %	13.8 %
Intermediaries: TE-centres	0.0 %	27.3 %	72.7 %	0.0 %	0.0 %	0.0 %
Intermediaries: Other intermediaries	2.7 %	10.7 %	20.0 %	29.3 %	34.7 %	2.7 %
Total	2.3 %	12.8 %	26.7 %	25.6 %	30.2 %	2.3 %

24 What share of your DOMESTIC personnel has a TECHNICAL UNIVERSITY degree?

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*	*I don't know*
Gov.: Innovation support gov. orgs.	0.0 %	17.7 %	32.9 %	8.2 %	0.0 %	41.2 %
Gov.: Education support gov. orgs.	6.5 %	71.0 %	0.0 %	0.0 %	0.0 %	22.6 %
Gov.: Other ministries	19.5 %	46.9 %	15.6 %	3.9 %	3.1 %	10.9 %
Gov.: Other public sector orgs.	0.0 %	24.1 %	13.8 %	14.9 %	27.6 %	19.5 %
Total	5.6 %	32.8 %	14.6 %	10.6 %	17.5 %	18.8 %
Intermediaries: TE-centres	0.0 %	63.6 %	27.3 %	0.0 %	0.0 %	9.1 %
Intermediaries: Other intermediaries	14.7 %	33.3 %	21.3 %	18.7 %	6.7 %	5.3 %
Total	12.8 %	37.2 %	22.1 %	16.3 %	5.8 %	5.8 %

25 Who are the primary users of your financing or services?

25a Private companies

	Percent of respondents, who chose the option
Gov.: Innovation support gov. orgs.	81.8 %
Gov.: Education support gov. orgs.	12.1 %
Gov.: Other ministries	12.7 %
Gov.: Other public sector orgs.	93.6 %
Intermediaries: TE-centres	100.0 %
Intermediaries: Other intermediaries	97.4 %

25b Private research organizations

Gov.: Innovation support gov. orgs.	61.4 %
Gov.: Education support gov. orgs.	6.1 %
Gov.: Other ministries	29.7 %
Gov.: Other public sector orgs.	11.3 %
Intermediaries: TE-centres	18.2 %
Intermediaries: Other intermediaries	7.9 %

25c Other private organizations

Gov.: Innovation support gov. orgs.	40.9 %
Gov.: Education support gov. orgs.	12.1 %
Gov.: Other ministries	17.0 %
Gov.: Other public sector orgs.	16.1 %
Intermediaries: TE-centres	36.4 %
Intermediaries: Other intermediaries	17.1 %

25d Private persons

Gov.: Innovation support gov. orgs.	9.1 %
Gov.: Education support gov. orgs.	15.2 %
Gov.: Other ministries	4.2 %
Gov.: Other public sector orgs.	8.1 %
Intermediaries: TE-centres	18.2 %
Intermediaries: Other intermediaries	30.3 %

25e Education /research: Universities

Gov.: Innovation support gov. orgs.	77.3 %
Gov.: Education support gov. orgs.	87.9 %
Gov.: Other ministries	41.5 %
Gov.: Other public sector orgs.	29.0 %
Intermediaries: TE-centres	81.8 %
Intermediaries: Other intermediaries	43.4 %

25f Education /research: Polytechnics

Gov.: Innovation support gov. orgs.	48.9 %
Gov.: Education support gov. orgs.	36.4 %
Gov.: Other ministries	8.5 %
Gov.: Other public sector orgs.	14.5 %
Intermediaries: TE-centres	63.6 %
Intermediaries: Other intermediaries	44.7 %

25g Education /research: Other educational institutes

Gov.: Innovation support gov. orgs.	8.0 %
Gov.: Education support gov. orgs.	24.2 %
Gov.: Other ministries	8.5 %
Gov.: Other public sector orgs.	8.1 %
Intermediaries: TE-centres	36.4 %
Intermediaries: Other intermediaries	9.2 %

25h Public: Research institutes

Gov.: Innovation support gov. orgs.	83.0 %
Gov.: Education support gov. orgs.	69.7 %
Gov.: Other ministries	71.2 %
Gov.: Other public sector orgs.	37.1 %
Intermediaries: TE-centres	45.5 %
Intermediaries: Other intermediaries	13.2 %

25i Public: Municipalities

Gov.: Innovation support gov. orgs.	37.5 %
Gov.: Education support gov. orgs.	6.1 %
Gov.: Other ministries	33.1 %
Gov.: Other public sector orgs.	25.8 %
Intermediaries: TE-centres	81.8 %
Intermediaries: Other intermediaries	47.4 %

25j Public: Other regional operators (TE-centers, Centers of Expertise or Technology, etc.)

Gov.: Innovation support gov. orgs.	52.3 %
Gov.: Education support gov. orgs.	6.1 %
Gov.: Other ministries	3.4 %
Gov.: Other public sector orgs.	29.0 %
Intermediaries: TE-centres	45.5 %
Intermediaries: Other intermediaries	27.6 %

25k Public: Other national operators

Gov.: Innovation support gov. orgs.	26.1 %
Gov.: Education support gov. orgs.	24.2 %
Gov.: Other ministries	32.2 %
Gov.: Other public sector orgs.	38.7 %
Intermediaries: TE-centres	18.2 %
Intermediaries: Other intermediaries	13.2 %

26 One of the most central functions of the system is to facilitate PRIVATE business and innovation activities. Against this backdrop, how would you characterize the innovation system as a whole?

See companies, question 17.

27 How well do GOVERNMENTAL research organizations match the information needs of your organization?

	Not at all	*Not very well*	*Somewhat well*	*Very well*	*I don't know*
Gov.: Innovation support gov. orgs.	0.0 %	24.1 %	68.5 %	3.7 %	3.7 %
Gov.: Education support gov. orgs.	0.0 %	18.2 %	51.5 %	30.3 %	0.0 %
Gov.: Other ministries	0.0 %	30.7 %	55.0 %	14.3 %	0.0 %
Gov.: Other public sector orgs.	0.0 %	43.6 %	47.2 %	0.0 %	9.2 %
Total	0.0 %	37.3 %	51.0 %	5.9 %	5.9 %

28 How well do PRIVATE research organizations match the information needs of your organization?

	Not at all	*Not very well*	*Somewhat well*	*Very well*	*I don't know*
Gov.: Innovation support gov. orgs.	0.0 %	20.4 %	55.6 %	16.7 %	7.4 %
Gov.: Education support gov. orgs.	30.3 %	30.3 %	39.4 %	0.0 %	0.0 %
Gov.: Other ministries	3.7 %	54.1 %	39.3 %	0.0 %	3.0 %
Gov.: Other public sector orgs.	6.2 %	17.4 %	56.4 %	0.0 %	20.0 %
Total	6.6 %	27.8 %	50.9 %	1.2 %	13.5 %

29 How well do UNIVERSITIES AND POLYTECHNICS match the information needs of your organization?

	Not at all	*Not very well*	*Somewhat well*	*Very well*	*I don't know*
Gov.: Innovation support gov. orgs.	0.0 %	3.7 %	78.7 %	10.2 %	7.4 %
Gov.: Education support gov. orgs.	0.0 %	12.1 %	51.5 %	36.4 %	0.0 %
Gov.: Other ministries	7.1 %	34.3 %	55.7 %	0.0 %	2.9 %
Gov.: Other public sector orgs.	0.0 %	7.7 %	78.5 %	12.3 %	1.5 %
Total	1.9 %	14.6 %	70.9 %	10.4 %	2.2 %

30 The new national innovation strategy was published in July 2008 and the related government communication was handed to the parliament in October 2008. How has your organization reacted to these documents?

	The organization has not familiarized itself with the strategy/ communication.	*Single individuals have familiarized themselves based on their own interest.*	*Official meetings have been held regarding the topic.*	*An official planning process has been initiated regarding the topic.*
Gov.: Innovation support gov. orgs.	0.0 %	7.7 %	7.7 %	6.7 %
Gov.: Education support gov. orgs.	0.0 %	6.1 %	0.0 %	21.2 %
Gov.: Other ministries	14.7 %	56.6 %	2.9 %	3.7 %
Gov.: Other public sector orgs.	0.0 %	17.7 %	5.2 %	0.0 %
Total	3.8 %	26.3 %	4.5 %	2.8 %
Intermediaries: TE-centres	0.0 %	45.5 %	9.1 %	0.0 %
Intermediaries: Other intermediaries	8.0 %	48.0 %	5.3 %	1.3 %
Total	7.0 %	47.7 %	5.8 %	1.2 %

	An official planning process has been initiated regarding the topic.	*SOME practical measures have been carried out based on them.*	*SEVERAL practical measures have been carried out based on them.*	*The measures invoked by the document(s), have already been carried out in full.*
Gov.: Innovation support gov. orgs.	6.7 %	3.9 %	74.0 %	0.0 %
Gov.: Education support gov. orgs.	21.2 %	42.4 %	30.3 %	0.0 %
Gov.: Other ministries	3.7 %	18.4 %	0.0 %	3.7 %
Gov.: Other public sector orgs.	0.0 %	39.1 %	30.2 %	7.8 %
Total	2.8 %	31.4 %	25.5 %	5.7 %
Intermediaries: TE-centres	0.0 %	9.1 %	36.4 %	0.0 %
Intermediaries: Other intermediaries	1.3 %	22.7 %	14.7 %	0.0 %
Total	1.2 %	20.9 %	17.4 %	0.0 %

31 In your opinion, does the strategy/communication require changes in the activities of your organization?

	Yes	*No*	*I don't know*
Innovation support gov. orgs.	86.1 %	10.2 %	3.7 %
Education support gov. orgs.	63.6 %	36.4 %	0.0 %
Other ministries	6.4 %	55.7 %	37.9 %
Other public sector orgs.	37.0 %	53.1 %	9.9 %
Total	34.2 %	49.7 %	16.2 %

32 How much has the strategy/communication helped in steering the activities of your organization?

	Not at all	*Not very much*	*Somewhat*	*Very much*	*I don't know*
Innovation support gov. orgs.	3.7 %	21.3 %	26.9 %	44.4 %	3.7 %
Education support gov. orgs.	0.0 %	69.7 %	30.3 %	0.0 %	0.0 %
Other ministries	13.6 %	42.1 %	6.4 %	0.0 %	37.9 %
Other public sector orgs.	23.4 %	43.2 %	24.0 %	9.4 %	0.0 %
Total	18.0 %	43.0 %	20.0 %	8.9 %	10.2 %

33 In your opinion, what is the most significant STRENGTH of Finland's innovation system in the 2010's? Input your

Open field

34 In your opinion, what is the most significant WEAKNESS of Finland's innovation system in the 2010's? Input your response in the open field below.

Open field

35 In your opinion, what is the most significant OPPORTUNITY regarding Finland's innovation strategy in the 2010's? Input your response in the open field below.

Open field

36 In your opinion, what is the most important THREAT regarding Finland's innovation strategy in the 2010's? Input your response in the open field below.

Open field

RESEARCH INSTITUTES

14 What are your sources of funding? (If your funding structure varies from year to year, please answer using the average of the last three years.)

14a Government's budget

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Intermediaries: TE-centres	0.0 %	0.0 %	27.3 %	45.5 %	27.3 %
Intermediaries: Other intermediaries	22.2 %	53.3 %	15.6 %	6.7 %	2.2 %
Research: Public research institutes	0.0 %	57.1 %	14.3 %	28.6 %	0.0 %
Research: Other research instititutes	100.0 %	0.0 %	0.0 %	0.0 %	0.0 %

14b Municipalities

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Intermediaries: TE-centres	0.0 %	0.0 %	0.0 %	100.0 %	0.0 %
Intermediaries: Other intermediaries	4.2 %	46.5 %	29.6 %	14.1 %	5.6 %
Research: Public research institutes	40.0 %	60.0 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	40.0 %	40.0 %	20.0 %	0.0 %	0.0 %

14c EU

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Intermediaries: TE-centres	0.0 %	37.5 %	50.0 %	12.5 %	0.0 %
Intermediaries: Other intermediaries	3.8 %	60.4 %	26.4 %	5.7 %	3.8 %
Research: Public research institutes	0.0 %	100.0 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	0.0 %	85.7 %	0.0 %	0.0 %	14.3 %

14d Tekes

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Intermediaries: TE-centres	0.0 %	66.7 %	33.3 %	0.0 %	0.0 %
Intermediaries: Other intermediaries	18.8 %	65.6 %	12.5 %	3.1 %	0.0 %
Research: Public research institutes	0.0 %	100.0 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	0.0 %	66.7 %	16.7 %	16.7 %	0.0 %

14e Other public sources

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Intermediaries: Other intermediaries	18.9 %	67.6 %	8.1 %	5.4 %	0.0 %
Research: Public research institutes	0.0 %	100.0 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	0.0 %	100.0 %	0.0 %	0.0 %	0.0 %

14f Private companies

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Intermediaries: Other intermediaries	3.8 %	49.1 %	30.2 %	11.3 %	5.7 %
Research: Public research institutes	14.3 %	42.9 %	42.9 %	0.0 %	0.0 %
Research: Other research instititutes	20.0 %	80.0 %	0.0 %	0.0 %	0.0 %

14g Private foundations

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Intermediaries: TE-centres	0.0 %	100.0 %	0.0 %	0.0 %	0.0 %
Intermediaries: Other intermediaries	86.7 %	13.3 %	0.0 %	0.0 %	0.0 %
Research: Public research institutes	16.7 %	83.3 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	20.0 %	60.0 %	20.0 %	0.0 %	0.0 %

14h Other private sources

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Intermediaries: Other intermediaries	64.7 %	29.4 %	5.9 %	0.0 %	0.0 %
Research: Public research institutes	40.0 %	60.0 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	40.0 %	40.0 %	20.0 %	0.0 %	0.0 %

15 To what extent does your research serve the following instances?

15a Public decision making on national level

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
Research: Public research institutes	0.0 %	0.0 %	28.6 %	71.4 %	0.0 %
Research: Other research instititutes	0.0 %	28.6 %	14.3 %	57.1 %	0.0 %
Research: Total	0.0 %	14.3 %	21.4 %	64.3 %	0.0 %

15b Public decision making on regional level

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
Research: Public research institutes	0.0 %	50.0 %	33.3 %	16.7 %	0.0 %
Research: Other research instititutes	14.3 %	57.1 %	28.6 %	0.0 %	0.0 %
Research: Total	7.7 %	53.9 %	30.8 %	7.7 %	0.0 %

15c Public decision making on international level

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
Research: Public research institutes	0.0 %	57.1 %	42.9 %	0.0 %	0.0 %
Research: Other research instititutes	0.0 %	42.9 %	28.6 %	28.6 %	0.0 %
Research: Total	0.0 %	50.0 %	35.7 %	14.3 %	0.0 %

15d Companies

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
Research: Public research institutes	0.0 %	57.1 %	0.0 %	42.9 %	0.0 %
Research: Other research instititutes	14.3 %	14.3 %	71.4 %	0.0 %	0.0 %
Research: Total	7.1 %	35.7 %	35.7 %	21.4 %	0.0 %

15e We provide information for the public good

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
Research: Public research institutes	0.0 %	28.6 %	42.9 %	28.6 %	0.0 %
Research: Other research instititutes	0.0 %	14.3 %	42.9 %	42.9 %	0.0 %
Research: Total	0.0 %	21.4 %	42.9 %	35.7 %	0.0 %

16 How large is the share of your organisation's labour input that has been allocated to...

16a ... education

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Research: Public research institutes	0.0 %	83.3 %	0.0 %	16.7 %	0.0 %
Research: Other research instititutes	0.0 %	100.0 %	0.0 %	0.0 %	0.0 %
Research: Total	0.0 %	92.3 %	0.0 %	7.7 %	0.0 %
Education: University department heads	0.0 %	21.8 %	53.5 %	19.3 %	5.5 %
Education: University rectors	0.0 %	0.0 %	72.7 %	18.2 %	9.1 %
Education: Polytechnic rectors	0.0 %	0.0 %	5.9 %	58.8 %	35.3 %

16b ... research

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Research: Public research institutes	0.0 %	14.3 %	0.0 %	42.9 %	42.9 %
Research: Other research instititutes	0.0 %	14.3 %	0.0 %	57.1 %	28.6 %
Research: Total	0.0 %	14.3 %	0.0 %	50.0 %	35.7 %
Education: University department heads	0.0 %	30.1 %	47.3 %	20.2 %	2.5 %
Education: University rectors	0.0 %	18.2 %	72.7 %	9.1 %	0.0 %
Education: Polytechnic rectors	0.0 %	76.5 %	23.5 %	0.0 %	0.0 %

16c ... carrying out duties of public authority

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Research: Public research institutes	50.0 %	16.7 %	16.7 %	16.7 %	0.0 %
Research: Other research instititutes	33.3 %	50.0 %	16.7 %	0.0 %	0.0 %
Research: Total	41.7 %	33.3 %	16.7 %	8.3 %	0.0 %

16d ... supply of statistics

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Research: Public research institutes	60.0 %	40.0 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	50.0 %	33.3 %	16.7 %	0.0 %	0.0 %
Research: Total	54.6 %	36.4 %	9.1 %	0.0 %	0.0 %

16e ... administration

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Research: Public research institutes	0.0 %	100.0 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	33.3 %	33.3 %	16.7 %	0.0 %	16.7 %
Research: Total	16.7 %	66.7 %	8.3 %	0.0 %	8.3 %
Education: University department heads	1.0 %	81.5 %	16.5 %	0.0 %	1.0 %
Education: University rectors	0.0 %	90.9 %	9.1 %	0.0 %	0.0 %
Education: Polytechnic rectors	0.0 %	100.0 %	0.0 %	0.0 %	0.0 %

16f ... other functions

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Research: Public research institutes	33.3 %	66.7 %	0.0 %	0.0 %	0.0 %
Research: Other research instititutes	14.3 %	85.7 %	0.0 %	0.0 %	0.0 %
Total	20.0 %	80.0 %	0.0 %	0.0 %	0.0 %
Education: University department heads	26.1 %	72.6 %	0.6 %	0.0 %	0.6 %
Education: University rectors	18.2 %	81.8 %	0.0 %	0.0 %	0.0 %
Education: Polytechnic rectors	25.0 %	66.7 %	0.0 %	8.3 %	0.0 %

16g ... societal impact

	0 %	*1-25%*	*26-50%*	*51-75%*	*76-100%*
Education: University department heads	0.5 %	81.4 %	12.1 %	5.5 %	0.5 %
Education: University rectors	0.0 %	72.7 %	9.1 %	18.2 %	0.0 %
Education: Polytechnic rectors	0.0 %	64.7 %	11.8 %	11.8 %	11.8 %

17 In your opinion, how well does your organization as a governmental research organization respond to the information needs of your parent ministry?

	Not at all	*Not very well*	*To some extent*	*Very well*	*I don't know*
Research: Public research institutes	0.0 %	0.0 %	42.9 %	57.1 %	0.0 %

18 In your opinion, how well do private research organizations respond to the information needs of your parent ministry?

	Not at all	*Not very well*	*To some extent*	*Very well*	*I don't know*
Research: Public research institutes	0.0 %	42.9 %	57.1 %	0.0 %	0.0 %

19 In your opinion, how well do universities and polytechnics respond to the information needs of your parent ministry?

	Not at all	*Not very well*	*To some extent*	*Very well*	*I don't know*
Research: Public research institutes	0.0 %	85.7 %	14.3 %	0.0 %	0.0 %

EDUCATION

15 How significant was the role of the following actors in cooperative projects of your department/organization in the last three years?

15a Domestic universities

	None	*Small*	*Fairly large*	*Very large*	*I don't know*
University department heads	0.0 %	15.2 %	34.3 %	50.5 %	0.0 %
University rectors	0.0 %	0.0 %	45.5 %	54.6 %	0.0 %
Polytechnic rectors	0.0 %	11.8 %	76.5 %	11.8 %	0.0 %

15b Foreign universities

	None	*Small*	*Fairly large*	*Very large*	*I don't know*
University department heads	1.0 %	16.2 %	41.7 %	41.2 %	0.0 %
University rectors	0.0 %	0.0 %	81.8 %	18.2 %	0.0 %
Polytechnic rectors	0.0 %	29.4 %	47.1 %	23.5 %	0.0 %

15c Polytechnics

	None	*Small*	*Fairly large*	*Very large*	*I don't know*
University department heads	41.2 %	42.2 %	14.2 %	2.5 %	0.0 %
University rectors	0.0 %	63.6 %	36.4 %	0.0 %	0.0 %
Polytechnic rectors	0.0 %	0.0 %	29.4 %	70.6 %	0.0 %

15d Public research organizations

	None	*Small*	*Fairly large*	*Very large*	*I don't know*
University department heads	18.1 %	36.8 %	34.3 %	10.3 %	0.5 %
University rectors	9.1 %	18.2 %	54.6 %	18.2 %	0.0 %
Polytechnic rectors	5.9 %	52.9 %	35.3 %	5.9 %	0.0 %

15e Private research institutes

	None	*Small*	*Fairly large*	*Very large*	*I don't know*
University department heads	50.0 %	37.3 %	9.3 %	1.5 %	2.0 %
University rectors	27.3 %	63.6 %	9.1 %	0.0 %	0.0 %
Polytechnic rectors	11.8 %	76.5 %	5.9 %	5.9 %	0.0 %

15f Open internet communities

	None	*Small*	*Fairly large*	*Very large*	*I don't know*
University department heads	25.6 %	41.4 %	22.7 %	4.4 %	5.9 %
University rectors	9.1 %	63.6 %	27.3 %	0.0 %	0.0 %
Polytechnic rectors	5.9 %	17.7 %	52.9 %	17.7 %	5.9 %

15g Domestic companies

	None	*Small*	*Fairly large*	*Very large*	*I don't know*
University department heads	14.8 %	32.0 %	27.1 %	26.1 %	0.0 %
University rectors	9.1 %	18.2 %	45.5 %	27.3 %	0.0 %
Polytechnic rectors	0.0 %	11.8 %	47.1 %	41.2 %	0.0 %

15h Foreign companies

	None	*Small*	*Fairly large*	*Very large*	*I don't know*
University department heads	44.1 %	35.3 %	15.7 %	3.4 %	1.5 %
University rectors	18.2 %	54.6 %	18.2 %	9.1 %	0.0 %
Polytechnic rectors	23.5 %	58.8 %	11.8 %	5.9 %	0.0 %

16 Have joint projects with companies addressed the following research objectives of your department?

16a Basic research -driven general search for new ideas

	Yes	*No*	*I don't know*
University department heads	57.6 %	34.6 %	7.9 %
University rectors	80.0 %	-20.0 %	0.0 %
Polytechnic rectors	17.7 %	-76.5 %	5.9 %

16b Access to complementary expertise

	Yes	*No*	*I don't know*
University department heads	53.4 %	36.1 %	10.5 %
University rectors	80.0 %	20.0 %	0.0 %
Polytechnic rectors	100.0 %	0.0 %	0.0 %

16c Solving a specific problem

	Yes	*No*	*I don't know*
University department heads	69.1 %	22.5 %	8.4 %
University rectors	90.0 %	10.0 %	0.0 %
Polytechnic rectors	100.0 %	0.0 %	0.0 %

16d Prototype development/testing

	Yes	*No*	*I don't know*
University department heads	37.6 %	54.0 %	8.5 %
University rectors	40.0 %	40.0 %	20.0 %
Polytechnic rectors	82.4 %	17.7 %	0.0 %

16e Participation in public research programs

	Yes	*No*	*I don't know*
University department heads	68.6 %	23.6 %	7.9 %
University rectors	100.0 %	0.0 %	0.0 %
Polytechnic rectors	94.1 %	5.9 %	0.0 %

16f Supply of competent personnel

	Yes	*No*	*I don't know*
University department heads	46.3 %	42.1 %	11.6 %
University rectors	90.0 %	10.0 %	0.0 %
Polytechnic rectors	94.1 %	5.9 %	0.0 %

16g Provision of professional development opportunities for staff

	Yes	*No*	*I don't know*
University department heads	29.8 %	59.6 %	10.6 %
University rectors	80.0 %	10.0 %	10.0 %
Polytechnic rectors	94.1 %	5.9 %	0.0 %

17 According to your own ESTIMATE, to what extent does your department answer to the following needs of CORPORATE innovation activities?

17a Basic research -driven general search for new ideas

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
University department heads	11.28 %	24.10 %	33.85 %	28.21 %	2.56 %
University rectors	18.18 %	9.09 %	36.36 %	36.36 %	0.00 %
Polytechnic rectors	47.06 %	35.29 %	17.65 %	0.00 %	0.00 %

17b Access to complementary expertise

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
University department heads	11.3 %	24.6 %	37.4 %	21.0 %	5.6 %
University rectors	18.2 %	27.3 %	36.4 %	18.2 %	0.0 %
Polytechnic rectors	0.0 %	11.8 %	58.8 %	29.4 %	0.0 %

17c Solving a specific problem

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
University department heads	9.4 %	23.4 %	44.3 %	19.3 %	3.7 %
University rectors	9.1 %	18.2 %	63.6 %	9.1 %	0.0 %
Polytechnic rectors	0.0 %	5.9 %	64.7 %	29.4 %	0.0 %

17d Prototype development/testing

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
University department heads	39.6 %	29.2 %	18.2 %	9.4 %	3.7 %
University rectors	27.3 %	45.5 %	18.2 %	0.0 %	9.1 %
Polytechnic rectors	17.7 %	5.9 %	64.7 %	11.8 %	0.0 %

17e Participation in public research programs

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
University department heads	10.5 %	23.6 %	38.7 %	23.0 %	4.2 %
University rectors	0.0 %	9.1 %	63.6 %	27.3 %	0.0 %
Polytechnic rectors	5.9 %	0.0 %	58.8 %	35.3 %	0.0 %

17f Supply of competent personnel

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
University department heads	5.8 %	22.0 %	36.1 %	31.4 %	4.7 %
University rectors	0.0 %	9.1 %	72.7 %	18.2 %	0.0 %
Polytechnic rectors	0.0 %	5.9 %	17.7 %	76.5 %	0.0 %

17g Provision of professional development opportunities for staff

	Not at all	*To some extent*	*To a fairly large extent*	*To a very large extent*	*I don't know*
University department heads	20.4 %	41.4 %	23.0 %	9.4 %	5.8 %
University rectors	0.0 %	27.3 %	54.6 %	18.2 %	0.0 %
Polytechnic rectors	0.0 %	11.8 %	17.7 %	70.6 %	0.0 %

18 In your opinion, what is the most significant STRENGTH of your university/polytechnic in the 2010's? Input your
Open field

19 In your opinion, what is the most significant WEAKNESS of your university/polytechnic in the 2010's? Input your
Open field

20 In your opinion, what is the most significant OPPORTUNITY your university/polytechnic is facing in the 2010's? Input your response in the open field below.
Open field

21 In your opinion, what is the most important THREAT your university/polytechnic is facing in the 2010's? Input your
Open field

MUNICIPALITIES

14 Does your municipality provide any of the following services in order to support your local INNOVATION ACTIVITIES?

Financing (subsidies, grants, loans, guarantees, or capital investments)	*Information services*	*Promotion of international labor mobility*	*Internationalization of companies*	*Research- and education services*	*Facilities*
52.9 %	87.2 %	20.4 %	38.8 %	41.8 %	68.5 %

15 Has your municipality an explicit strategy or agenda related to INNOVATION ACTIVITIES?

Yes	*No*	*I don't know*
19.6 %	79.2 %	1.2 %

16 How much PROPRIETORY FUNDING did your municipality use to promote INNOVATION ACTIVITIES in 2008?

Open field Euros

17 How much national or international (incl. EU-funding) public funding was used IN ADDITION TO YOUR OWN FUNDING to support innovation activities in 2008?

Open field Euros

18 What was your municipality's total budget in 2008?

Open field Euros

19 Has innovativeness been a central criterion in the selection of service providers or goods suppliers in your municipality?

Never	*Seldom*	*Often*	*I don't know*
32.5 %	50.2 %	8.1 %	9.1 %

20 Would you say it is possible to support the promotion of innovation activities through public procurement?

Yes	*No*	*I don't know*
72.9 %	18.1 %	9.0 %

FOUNDATIONS

5 How would you assess the development of the importance of foundations in the Finnish innovation system in the next five years?

Decreasing	*No change*	*Increasing*	*I don't know*
3.6 %	30.4 %	57.1 %	8.9 %

6 Should the legislation regarding foundations be reformed to

No need for changes	*Yes (how?)*	*I don't know*
43.6 %	34.6 %	21.8 %

7 Which of the following fields does your foundation support?

Humanities	*Social sciences*	*Natural sciences*	*Agriculture and forestry*	*Technology*	*Medicine*
57.1 %	55.1 %	42.9 %	18.4 %	34.7 %	38.8 %

8 Which of the following activities does your foundation MAINLY support? (Please choose only one)

Research in Finland	*Research abroad*	*Studying in Finland*	*Studying abroad*	*Conference trips*	*Something else*
73.5 %	0.0 %	10.2 %	2.0 %	0.0 %	14.3 %

11 University departments in Finland are considered too small. To your understanding, would your foundation have the readiness to sponsor a professorship if the government supported the professorship by providing 2.5 Euros for each Euro you provide?

Not at all	*1-2 professor - ships*	*3-5 professor- ships*	*More than 5 professor- ships*	*I don't know*
48.0 %	22.0 %	6.0 %	0.0 %	24.0 %

FINANCERS

16 Would you say that PUBLIC actors provide similar services than your organization?

	Yes	*No*	*I don't know*
Financing: Business angels, VCs	27.3 %	63.6 %	9.1 %
Financing: Banks, loan officers	38.5 %	61.5 %	0.0 %

17 The new national innovation strategy was published in July 2008 and the respective

	Yes	*No*	*I don't know*
Financing: Business angels, VCs	72.7 %	27.3 %	0.0 %

18 How many of the companies you are funding have had to defer or cancel an investment-, R&D-, marketing-, or any other type of project due to the global financial crisis?

	1-25%	*26-50%*	*51-75%*	*76-100%*	*I don't know*
Financing: Business angels, VCs	27.3 %	36.4 %	27.3 %	9.1 %	0.0 %
Financing: Banks, loan officers	46.7 %	6.7 %	26.7 %	6.7 %	13.3 %
Total	37.0 %	21.5 %	27.0 %	7.9 %	6.7 %

19 Has the financial crisis changed the amount of incoming funding applications?

	Substantial increase	*Some increase*	*No Change*	*Some decrease*	*Substantial decrease*
Financing: Business angels, VCs	9.1 %	54.6 %	18.2 %	18.2 %	0.0 %
Financing: Banks, loan officers	0.0 %	46.7 %	20.0 %	20.0 %	13.3 %

20 Has the quality of the funding applications changed due to the financial crisis?

	Substantial decrease	*Some decrease*	*No Change*	*Some increase*	*Substantial increase*
Financing: Business angels, VCs	0.0 %	36.4 %	45.5 %	18.2 %	0.0%
Financing: Banks, loan officers	6.7 %	53.3 %	26.7 %	13.3 %	0.0%

21 Have you changed your investment or funding criteria due to the financial crisis?

	Tightened	*No change*	*Loosened*	*I don't know*
Financing: Business angels, VCs	18.2 %	81.8 %	0.0 %	0.0 %
Financing: Banks, loan officers	86.7 %	13.3 %	0.0 %	0.0 %

22 Does governmental funding displace or complement your operations as a private provider of corporate funding?

	Displaces	*Somewhat displaces*	*In between*	*Somewhat complements*	*Complements*
Financing: Business angels, VCs	0.0 %	9.1 %	18.2 %	18.2 %	54.6 %
Financing: Banks, loan officers	0.0 %	6.7 %	6.7 %	60.0 %	26.7 %

APPENDIX IV - Questionnaires in English

1. Questions posed to ALL RESPONDENTS

EVALUATION OF THE FINNISH NATIONAL INNOVATION SYSTEM

The Research institute of the Finnish Economy (ETLA) is carrying out a survey related to the evaluation of the Finnish innovation system (www.evaluation.fi) which we would like you to answer to. The evaluation was assigned and is supported by the ministry of employment and the economy (TEM) and the ministry of education (OPM). The aim is to collect general views on the characteristics of the innovation system.

The NATIONAL INNOVATION SYSTEM (NIS) refers to the totality of private and public actors participating in producing and applying knowledge and information to promote the welfare of Finnish citizens.

1) How would you grade the Finnish national innovation system (NIS) AT THE MOMENT?
Scale 4 - 10 / I don't know

2) If you evaluated the system as it was 5 YEARS AGO, how would you grade it?
Scale 4 - 10 / I don't know

3) Taking into account the ongoing and future reforms, what grade would you give to the NIS as you anticipate it to be IN 5 YEARS?
Scale 4 - 10 / I don't know

4) How would you describe the regime constituted by the PUBLIC SECTOR actors in the NIS?
Very simple / Rather simple / Rather complex / Very complex/ I don't know

5) From the point of view of YOUR OWN ORGANISATION, how important do you consider the following governmental actors of the NIS? Please choose ONE alternative for each organisation.

	Not at all important	Not very important	Rather important	Very important	I don't know
Tekes	O	O	O	O	O
Sitra	O	O	O	O	O
The Academy of Finland	O	O	O	O	O
Ministry of employment and the economy	O	O	O	O	O
Ministry of education	O	O	O	O	O
Ministry of social affairs and health	O	O	O	O	O
Ministry of finance	O	O	O	O	O
Other ministries	O	O	O	O	O
Technical Research Centre of Finland (VTT)	O	O	O	O	O
Other public research organisations	O	O	O	O	O
Finpro	O	O	O	O	O
Foundation for Finnish Inventions	O	O	O	O	O
Universities	O	O	O	O	O
Polytechnics	O	O	O	O	O
Local TE-centres	O	O	O	O	O
Industry Investment	O	O	O	O	O
Finnvera	O	O	O	O	O
Centres of Expertise or Technology	O	O	O	O	O
Research and Innovation council (Science and technology policy council)	O	O	O	O	O

6) "Technology push" and "demand pull" are alternative concepts that often characterize the orientation of innovation policies. Which of the two characterizes the Finnish national innovation policy best? Please encircle ONE option on a scale from 1 to 5, where 1=strong technology push and 5=strong demand pull.

(Technology push) 1 2 3 4 5 (Demand pull)

7) In the NIS universities, polytechnics, and public research organisations have their own roles. Indicate by checking the respective boxes WHETHER the listed actors SUCCESSFULLY take care of the following tasks. Please check the options only if, in your opinion, the actor performs WELL in the respective tasks.

	International top-class research	Research for national needs	Prod. of competence for international business activities	Prod. of competence for local business activities
Universities	☐	☐	☐	☐
Polytechnics	☐	☐	☐	☐
Public research organisations	☐	☐	☐	☐

8) One of the objectives of the NIS is to promote growth entrepreneurship and generate rapidly growing companies in Finland. How would you grade the system in this respect?
Scale 4 - 10 / I don't know

9) Would you say the NIS promotes also agendas of regional policy?
Yes / No / I don't know

10) In your opinion, is the NATIONAL innovation policy equally effective in all regions of Finland?
Yes / No / I don't know

NETWORKING refers to long-time partnerships aiming to improve common utility by exchanging information and combining the knowledge and other resources of involved parties.

11) How important are NATIONAL networks for the activities of your organisation?
Not at all important / Not very important / Rather important / Very important / I don't know

12) How important are INTERNATIONAL networks for the activities of your organisation?
Not at all important / Not very important / Rather important / Very important / I don't know

13) What do you think about the following statements? Please choose ONE alternative for each reform.

The forthcoming reform of the UNIVERSITIES ACT will promote...	Completely disagree	Somewhat disagree	Somewhat agree	Completely agree	I don't know
... internationalization.	O	O	O	O	O
... quality of teaching.	O	O	O	O	O
... quality of research.	O	O	O	O	O
... societal impact.	O	O	O	O	O
The centres of strategic excellence (SHOKs) enhance the system's performance.	O	O	O	O	O
The possible reform of publicly funded research organisations would enhance the system's performance.	O	O	O	O	O
The reform of the University Inventions Act will enhance the co-operation between companies, universities and polytechnics.	O	O	O	O	O

2. Additional questions posed to COMPANIES

14) What is your company's primary source of earnings?
Consumers / Governmental or communal / Private companies or societies / I don't know

15) What is your company's primary position in the distribution chain? Please choose ONE alternative.

- O Main supplier: Vendor of end product /service responsible for its design.
- O System supplier: Provision of systems to main suppliers.
- O Supplier: Provision of products/services to be part of the customers' offering.
- O I don't know

16) How important are the following aspects from the perspective of your operations? Please choose ONE alternative for each aspect.

	Not at all important	Not very important	Rather important	Very important	I don't know
A generally positive attitude towards risk taking in society	O	O	O	O	O
The availability of risk financing	O	O	O	O	O
A motivating company and capital taxation scheme	O	O	O	O	O
The convenience of public administrative procedures	O	O	O	O	O
Guidance and information provided by the public sector	O	O	O	O	O
Financial support provided by the public sector	O	O	O	O	O
The readiness of universities and polytechnics to cooperate	O	O	O	O	O

17) One of the most central functions of the system is to facilitate PRIVATE business and innovation activities. Against this backdrop, how would you characterize the innovation system as a whole?
Very complex / Fairly complex / Fairly simple / Very simple / I don't know

18) The emergence of new growth companies could be facilitated by providing them with tax incentives regarding their future earnings and profit sharing. How efficient are such tax incentives in increasing the number of growth companies?
Not at all efficient / Not very efficient / Rather efficient / Very efficient / I don't know

INNOVATION ACTIVITIES aim at creating or adopting new or substantially improved products, services, or production or distribution methods.

19) Has your company engaged in innovation activities in the last three years?
Yes / No / I don't know

If you answered "Yes", please answer also the following questions. If you answered "No", you can stop here.

20) How important are the following DOMESTIC actors from the perspective of your company's innovation activities? Please choose ONE alternative for each actor.

	Not at all important	Not very important	Rather important	Very important	I don't know
Employees of your company/corporation	O	O	O	O	O
Device and materials suppliers	O	O	O	O	O
Client companies	O	O	O	O	O
Consumers / end users	O	O	O	O	O
Municipalities or the government	O	O	O	O	O
Competitors	O	O	O	O	O
Consultants / consulting agencies	O	O	O	O	O
Private research organisations	O	O	O	O	O
Public research organisations	O	O	O	O	O
Universities	O	O	O	O	O
Polytechnics	O	O	O	O	O

21) How important are the following FOREIGN actors from the perspective of your company's innovation activities? Please choose ONE alternative for each actor.

	Not at all important	Not very important	Rather important	Very important	I don't know
Employees of your company/corporation	O	O	O	O	O
Device and materials suppliers	O	O	O	O	O
Client companies	O	O	O	O	O
Consumers / end users	O	O	O	O	O
Municipalities or the government	O	O	O	O	O
Competitors	O	O	O	O	O
Consultants / consulting agencies	O	O	O	O	O
Private research organisations	O	O	O	O	O
Public research organisations	O	O	O	O	O
Universities	O	O	O	O	O
Polytechnics	O	O	O	O	O

22) Which of the following statements portray the role of end users in your innovation activities? Please choose ONE or SEVERAL of the options.

- ☐ They have no significant role.
- ☐ They are subject to frequent market studies (e.g. customer surveys).
- ☐ They provide active and frequent updates on the changes in their needs.
- ☐ They participate in the actual innovation activities.

23) Has any of your company's investment-, R&D-, marketing-, or any other type of project been deferred or cancelled due to the global financial crisis?
Yes / No / I don't know

Additional questions posed to PUBLIC ACTORS

14) Which of the following services does your ORGANIZATION provide to other actors of the Finnish national innovation system? The respondents chose ONE or SEVERAL of the following options.

- ☐ Financing (subsidies, grants, loans, guarantees, or capital investments)
- ☐ Information services
- ☐ Promotion of international labor mobility
- ☐ Internationalization of companies
- ☐ Research- and education services

15) Would you say that other PUBLIC actors provide similar services than your organization?
Yes / No / I don't know

16) Would you say that other PRIVATE actors provide similar services than your organization?
Yes / No / I don't know

17) Would you say that the co-operation between service providers is effortless?
Yes / No / I don't know

18) Which service provider is the co-operation especially EFFORTLESS with? Input your answer in the open field below.
Open field

19) Which service provider is the co-operation especially CHALLENGING with? Input your answer in the open field below.
Open field

Person-work year refers to one person's regular annual working time.

20) How many person-work years were carried out in the DOMESTIC departments of your organization in 2008?
Open field.

21) How many person-work years were carried out in the FOREIGN departments of your organization in 2008?
Open field.

INNOVATION ACTIVITIES aim at creating or adopting new or substantially improved products, services, or production and distribution methods.

22) How many person-work years were used in your organization for innovation activities and/or to promote them in 2008?
Open field

23) What is the share of your DOMESTIC personnel having a UNIVERSITY degree?
0 % / 1-25 % / 26–50% / 51–75% / 76–100% / I don't know

24) What is the share of your DOMESTIC personnel having TECHNICAL UNIVERSITY degree?
0 % / 1-25 % / 26–50% / 51–75% / 76–100% / I don't know

25) Who are the primary users of your services or financing? *The respondents chose ONE or SEVERAL of the following options:*

- ☐ Private companies
- ☐ Private research organizations
- ☐ Other private organizations
- ☐ Private persons
- ☐ Education/research: Universities
- ☐ Education/research: Polytechnics
- ☐ Education/research: Other educational institutes
- ☐ Public: Research institutes
- ☐ Public: Municipalities
- ☐ Public: Other regional operators (TE-centers, Centers of Expertise or Technology, etc.)
- ☐ Public: Other national operators

26) One of the most central functions of the system is to facilitate PRIVATE business and innovation activities. Against this backdrop, how would you characterize the innovation system as a whole?
Very complex / Fairly complex / Fairly simple / Very simple / I don't know

27) How well do GOVERNMENTAL research organizations match the information needs of your organization?
Not at all / Not very well / To some extent / Very well / I don't know

28) How well do PRIVATE research organizations match the information needs of your organization?
Not at all / Not very well / To some extent / Very well / I don't know

29) How well do UNIVERSITIES AND POLYTECHNICS match the information needs of your organization?
Not at all / Not very well / To some extent / Very well / I don't know

30) The new national innovation strategy was published in July 2008 and the respective government communication was handed to the parliament in October 2008. How has your organization reacted to these documents?
The respondents chose ONE of the following options.

- o The organization has not familiarized itself with the strategy/communication.
- o Single individuals have familiarized themselves according to their own interest.

- o Official meetings have been held regarding the documents.
- o An official planning process has been initiated regarding the documents.
- o SOME practical measures have been carried out based on them.
- o SEVERAL practical measures have been carried out based on them.
- o The measures invoked by the document(s), have already been carried out in full.

31) In your opinion, does the strategy/communication require changes in the activities of your organization?
Yes / No / I don't know

32) How much has the strategy/communication helped in steering the activities of your organization?
Not at all / Not very much / Somewhat / Very much / I don't know

33) In your opinion, what is the most significant STRENGTH of Finland's innovation system in the 2010's? Input your response in the open field below.
Open field

34) In your opinion, what is the most significant WEAKNESS of Finland's innovation system in the 2010's? Input your response in the open field below.
Open field

35) In your opinion, what is the most significant OPPORTUNITY regarding Finland's innovation strategy in the 2010's? Input your response in the open field below.
Open field

36) In your opinion, what is the most important THREAT regarding Finland's innovation strategy in the 2010's? Input your response in the open field below.
Open field

3. Additional questions posed to INTERMEDIARIES

14) Which of the following services does your ORGANIZATION provide to other actors of the Finnish national innovation system?
The respondents chose ONE or SEVERAL of the options below:

- ☐ Financing (subsidies, grants, loans, guarantees, or capital investments)
- ☐ Information services
- ☐ Promotion of international labor mobility
- ☐ Internationalization of companies
- ☐ Research- and education services

15) Would you say that other PUBLIC actors provide similar services than your organization?
Yes / No / I Don't know

16) Would you say that other PRIVATE actors provide similar services than your organization?
Yes / No / I Don't know

17) Would you say that the co-operation between the service providers is effortless?
Yes / No / I Don't know

18) Which service provider is the co-operation especially EFFORTLESS with? Input your answer in the open field below.
Open field

19) Which service provider is the co-operation especially CHALLENGING with? Input your answer in the open field below.
Open field

Person-work year refers to one person's regular annual working time.

20) How many person-work years were carried out in the DOMESTIC departments of your organization in year 2008?
Open field

21) How many person-work years were carried out in the FOREIGN departments of your organization in year 2008?
Open field

INNOVATION ACTIVITIES aim at creating or adopting new or substantially improved products, services, or production or distribution methods.

22) How many person-work years were allocated to innovation activities and/or to promote them in your organization in 2008?
Open field

23) What is the share of your DOMESTIC personnel having a UNIVERSITY degree?
0 % / 1-25 % / 26–50% / 51–75% / 76–100% / I don't know

24) What is the share of your DOMESTIC personnel having a TECHNICAL UNIVERSITY degree?
0 % / 1-25 % / 26–50% / 51–75% / 76–100% / I don't know

25) Who are the primary users of your services or funding?
The respondents chose ONE or SEVERAL of the following options:

- ☐ Private companies
- ☐ Private research organizations
- ☐ Other private organizations
- ☐ Private individuals
- ☐ Education/research: Universities
- ☐ Education/research: Polytechnics
- ☐ Education/research: Other educational institutes
- ☐ Public: Research institutes
- ☐ Public: Municipalities
- ☐ Public: Other regional operators (TE-centers, Centers of Expertise or Technology, etc.)
- ☐ Public: Other national operators

26) One of the most central functions of the system is to facilitate PRIVATE business and innovation activities. Against this backdrop, how would you characterize the innovation system as a whole?
Very simple / Fairly simple / Fairly complex / Very complex / I don't know

27) What are your sources of funding? If your funding structure varies from year to year, please answer using the average of the last three years.
Respondents assigned each of the listed sources a respective share of total funding on the scale
0% / 1-25% / 26-50% / 51-75% / 76-100%.

Government's budget
Municipalities
EU
Tekes
Other public sources
Private companies
Private foundations
Other private sources

28) The new national innovation strategy was published in July 2008 and the respective government communication was handed to the parliament in October 2008. How has your organization reacted to these documents?
The respondents chose ONE of the following options.

- o The organization has not familiarized itself with the strategy/communication.
- o Single individuals have familiarized themselves according to their own interest.
- o Official meetings have been held regarding the documents.
- o An official planning process has been initiated regarding the documents.
- o SOME practical measures have been carried out based on them.
- o SEVERAL practical measures have been carried out based on them.
- o The measures invoked by the document(s), have already been carried out in full.

29) In your opinion, what is the most significant STRENGTH of Finland's innovation system in the 2010's? Input your response in the open field below.
Open field

30) In your opinion, what is the most significant WEAKNESS of Finland's innovation system in the 2010's? Input your response in the open field below.
Open field

31) In your opinion, what is the most significant OPPORTUNITY regarding Finland's innovation strategy in the 2010's? Input your response in the open field below.
Open field

32) In your opinion, what is the most important THREAT regarding Finland's innovation strategy in the 2010's? Input your response in the open field below.
Open field

4. Additional questions posed to RESEARCH ORGANIZATIONS

14) What are your sources of funding? If your funding structure varies from year to year, please answer using the average of the last three years.
Respondents assigned each of the listed sources a respective share of total funding on the scale
0% / 1-25% / 26-50% / 51-75% / 76-100%.

Government's budget
Municipalities
EU
Tekes
Other public sources
Private companies
Private foundations
Other private sources

15) To what extent does your research serve the following instances?
Respondents assigned one of the following options to each of the aspects listed below.
Not at all / To some extent / To a fairly large extent / To a very large extent / I don't know

Public decision making on national level
Public decision making on regional level
Public decision making on international level
Companies
We provide information for the public good

16) How large is the share of your organisation's labour input that has been allocated to...
Respondents assigned each of the listed tasks a respective share of total labour input on the scale
0% / 1-25% / 26-50% / 51-75% / 76-100%.

... education
... research
... carrying out duties of public authority
... supply of statistics
... administration
... other functions

17) In your opinion, how well does your organization as a governmental research organization respond to the information needs of your parent ministry?
Not at all / Not very well / To some extent / Very well / I don't know

18) In your opinion, how well do private research organizations match the information needs of your parent ministry?
Not at all / Not very well / To some extent / Very well / I don't know

19) In your opinion, how well do universities and polytechnics match the information needs of your parent ministry?
Not at all / Not very well / To some extent / Very well / I don't know

5. Additional questions posed to DEPARTMENT HEADS

14) How large is the share of your department's labour input that has been allocated to... *Respondents assigned each of the listed tasks a respective share of total labour input on the scale*
0% / 1-25% / 26-50% / 51-75% / 76-100%.

... education
... research
... exerting societal impact
... administration
... other functions

15) How significant was the role of the following actors in cooperative projects of your department in the last three years? *Respondents assessed each of the listed actors on the scale*
none / small / fairly large / very large / I don't know.

Domestic universities
Foreign universities
Polytechnics

Public research organizations
Private research organizations
Open internet communities
Domestic companies
Foreign companies

16) Have joint projects with companies addressed the following research objectives of your department?
For each of the listed objectives respondents chose ONE of the options
Yes / No / I don't know.

Basic research -driven general search for new ideas
Access to complementary expertise
Solving a specific problem
Prototype development/testing
Participation in public research programs
Supply of competent personnel
Provision of professional development opportunities for staff

17) According to your own ESTIMATE, to what extent does your department answer to the following needs of CORPORATE innovation activities?
Respondents assessed the correspondence of their activities with the listed corporate needs on the scale
not at all / to some extent / to a fairly large extent / to a very large extent / I don't know.

Basic research -driven general search for new ideas
Access to complementary expertise
Solving a specific problem
Prototype development/testing
Participation in public research programs
Supply of competent personnel
Provision of professional development opportunities for staff

6. Additional questions posed to UNIVERSITY and POLYTECHNICS PRINCIPALS

14) How large is the share of your university's/polytechnic's labour input that has been allocated to...
Respondents assigned each of the listed tasks a respective share of total labour input on the scale
0% / 1-25% / 26-50% / 51-75% / 76-100%.

... education
... research
... exerting societal impact
... administration
... other functions

15) How significant was the role of the following actors in cooperative projects of your university/polytechnic in the last three years?
Respondents assessed each of the listed actors on the scale
none / small / fairly large / very large / I don't know.

Domestic universities
Foreign universities
Polytechnics
Public research organizations
Private research organizations
Open internet communities
Domestic companies
Foreign companies

16) Have cooperative projects with companies addressed the following research objectives of your university/polytechnic?
For each of the listed objectives respondents chose ONE of the options
Yes / No / I don't know.

Basic research -driven general search for new ideas
Access to complementary expertise
Solving a specific problem
Prototype development/testing
Participation in public research programs
Supply of competent personnel
Provision of professional development opportunities for staff

17) According to your own ESTIMATE, to what extent does your university/polytechnic answer to the following needs of CORPORATE innovation activities?
Respondents assessed themselves in regard to the listed corporate needs on the scale
not at all / to some extent / to a fairly large extent / to a very large extent / I don't know.

Basic research -driven general search for new ideas
Access to complementary expertise
Solving a specific problem
Prototype development/testing
Participation in public research programs
Supply of competent personnel
Provision of professional development opportunities for staff

18) In your opinion, what is the most significant STRENGTH of your university/polytechnic in the 2010's? Input your response in the open field below.
Open field

19) In your opinion, what is the most significant WEAKNESS of your university/polytechnic in the 2010's? Input your response in the open field below.
Open field

20) In your opinion, what is the most significant OPPORTUNITY your university/polytechnic is facing in the 2010's? Input your response in the open field below.
Open field

21) In your opinion, what is the most important THREAT your university/polytechnic is facing in the 2010's? Input your response in the open field below.
Open field

7. Additional questions posed to ASSOCIATIONS

14) In your opinion, what is the most significant STRENGTH of Finland's innovation system in the 2010's? Input your response in the open field below.
Open field

15) In your opinion, what is the most significant WEAKNESS of Finland's innovation system in the 2010's? Input your response in the open field below.
Open field

16) In your opinion, what is the most significant OPPORTUNITY regarding Finland's innovation strategy in the 2010's? Input your response in the open field below.
Open field

17) In your opinion, what is the most important THREAT regarding Finland's innovation strategy in the 2010's? Input your response in the open field below.
Open field

8. Additional questions posed to MUNICIPALITIES

INNOVATION ACTIVITIES aim at creating or adopting new or substantially improved products, services, or production or distribution methods.

14) Does your municipality provide any of the following services in order to support your local INNOVATION ACTIVITIES?
The respondents chose ONE or SEVERAL of the options below.

Financing (subsidies, grants, loans, guarantees, or capital investments)
Information services
Promotion of international labor mobility
Internationalization of companies
Research- and education services
Facilities

15) Does your municipality have an explicit strategy or agenda related to INNOVATION ACTIVITIES?
Yes / No / I don't know

16) How much PROPRIETORY FUNDING did your municipality use to promote INNOVATION ACTIVITIES in 2008?
Open field **Euros**

17) How much national or international (incl. EU-funding) public funding was used IN ADDITION TO YOUR OWN FUNDING to support innovation activities in 2008?
Open field **Euros**

18) What was your municipality's total budget in 2008?
Open field **Euros**

19) Has innovativeness been a central criterion in the selection of service providers or goods suppliers in your municipality?
Never / Seldom / Often / Always / I don't know

20) Would you say it is possible to support the promotion of innovation activities through public procurement?
Yes / No / I don't know

9. Additional questions posed to FOUNDATIONS

5) How would you assess the development of the importance of foundations in the Finnish innovation system in the next five years?
Decreasing / No change / Increasing / I don't know

6) Should the legislation regarding foundations be reformed to improve foundations' possibilities to support science, arts, and research?
The respondents chose ONE of the following options. In addition, with respect to the YES –option, respondents were presented with the possibility to input an open answer.
No need for changes / Yes (how?): Open field. / I don't know

7) Which of the following fields does your foundation support?
The respondents chose ONE or SEVERAL of the following options:
Humanities / Social sciences / Natural sciences / Agriculture and forestry / Technology / Medicine

8) Which of the following activities does your foundation MAINLY support? Please choose only one:
Research in Finland / Research abroad / Studying in Finland / Studying abroad / Conference trips / Other

9) What is the overall sum of grants and/or scholarships you provided in 2008?
Open field **Euros**

10) How many individuals received your grants and/or scholarships in 2008? (Including individual members of research groups.) *Open field*. **Euros**

11) University departments in Finland are considered too small. To your understanding, would your foundation have the readiness to sponsor a professorship if the government supported the professorship by providing 2.5 Euros for each Euro you provide?
Not at all / 1-2 professorships / 3-5 professorships / More than 5 professorships /I don't know

10. Additional questions posed to VENTURE CAPITALISTS and BUSINESS ANGELS

14) One of the most central functions of the system is to facilitate PRIVATE business and innovation activities. Against this backdrop, how would you characterize the innovation system as a whole?
Very simple / Fairly simple / Fairly complex / Very complex / I don't know

15) The emergence of new growth companies could be facilitated by providing them with tax incentives regarding their future earnings and profit sharing. How efficient are such tax incentives in increasing the number of growth companies?
Not at all efficient / Not very efficient / Rather efficient / Very efficient / I don't know

16) Would you say that PUBLIC actors provide similar services than your organization?
Yes / No / I don't know

17) The new national innovation strategy was published in July 2008 and the respective government communication was handed to the parliament in October 2008. Have you familiarized yourself with them?
Yes / No / I don't know

18) How many of the companies you are funding have had to defer or cancel an investment-, R&D-, marketing-, or any other type of project due to the global financial crisis?
0% / 1-25 % / 26–50% / 51–75% / 76–100% / I don't know

19) Has the financial crisis changed the amount of incoming funding applications?
Substantial increase / Some increase / No change / Some decrease / Substantial decrease

20) Has the quality of funding applications changed due to the financial crisis?
Substantial increase / Some increase / No change / Some decrease / Substantial decrease

21) Have you changed your investment or funding criteria due to the financial crisis?
Tightened / No change / Loosened / I don't know

When answering to the following question, please, think of the supply and demand of corporate funding in the context of NORMAL economic conditions, i.e. after the passing of the current financial crisis.

22) Does governmental funding displace or complement your operations as a private provider of corporate funding?
Respondents answered on a scale from 1-5 with 1 signifying substantial displacement and 5 substantial complementarity.
(Displaces) 1 2 3 4 5 (Complements)

11. Additional questions posed to BANKS (Banks did not answer to the first 13 questions)

1) How would you grade the Finnish national innovation system (NIS) AT THE MOMENT?
Scale 4 - 10 / I don't know

2) One of the objectives of the NIS is to promote growth entrepreneurship and generate rapidly growing companies in Finland. How would you grade the system in this respect?
Scale 4 - 10 / I don't know

3) One of the most central functions of the system is to facilitate PRIVATE business and innovation activities. Against this backdrop, how would you characterize the innovation system as a whole?
Very simple / Fairly simple / Fairly complex / Very complex / I don't know

4) The emergence of new growth companies could be facilitated by providing them with tax incentives regarding their future earnings and profit sharing. How efficient are such tax incentives in increasing the number of growth companies?
Not at all efficient / Not very efficient / Rather efficient / Very efficient / I don't know

5) Would you say that PUBLIC actors provide similar services than your organization?
Yes / No / I don't know

6) How many of the companies you are funding have had to defer or cancel an investment-, R&D-, marketing-, or any other type of project due to the global financial crisis?
0% / 1-25 % / 26–50% / 51–75% / 76–100% / I don't know

7) Has the financial crisis changed the amount of incoming funding applications?
Substantial increase / Some increase / No change / Some decrease / Substantial decrease

8) Has the quality (eligibility/risk) of the funding applications changed due to the financial crisis?
Substantial increase / Some increase / No change / Some decrease / Substantial decrease

9) Have you changed your investment or funding criteria due to the financial crisis?
Tightened / No change / Loosened / I don't know

When answering to the following question, please, think of the supply and demand of corporate funding in the context of NORMAL economic conditions, i.e. after the passing of the current financial crisis.

10) Does governmental funding displace or complement your operations as a private provider of corporate funding? *Respondents answered on a scale from 1-5 with 1 signifying substantial displacement and 5 substantial complementarity.*
(Displaces) 1 2 3 4 5 (Complements)

APPENDIX V - Questionnaires in Finnish

1. Kaikille vastaajille esitetyt kysymykset

SUOMEN INNOVAATIOJÄRJESTELMÄN ARVIOINTI

Elinkeinoelämän Tutkimuslaitos ETLA toteuttaa Suomen innovaatiojärjestelmän arviointiin (www.evaluation.fi) liittyvän kyselyn, johon toivomme teidän vastaavan. Arviointi toteutetaan Työ ja elinkeinoministeriön (TEM) sekä Opetusministeriön (OPM) toimeksiannosta ja tukemana. Kyselyllä kerätään laajasti organisaatioiden ja vaikuttajien yleiskäsityksiä järjestelmän piirteistä.

INNOVAATIOJÄRJESTELMÄLLÄ tarkoitetaan niiden yksityisten ja julkisten organisaatioiden muodostamaa kokonaisuutta, jotka osallistuvat tiedon ja osaamisen tuottamiseen ja soveltamiseen. Järjestelmän tavoitteena on edistää suomalaisten hyvinvointia.

1) Minkä arvosanan annatte Suomen innovaatiojärjestelmälle TÄLLÄ HETKELLÄ?
Asteikko 4-10 / En osaa sanoa

2) Jos arvioitte järjestelmää 5 VUOTTA SITTEN, niin minkä arvosanan antaisitte sille?
Asteikko 4-10 / En osaa sanoa

3) Näköpiirissä ja meneillään olevien muutosten valossa, minkä arvosanan uskoisitte antavanne innovaatiojärjestelmälle 5 VUODEN PÄÄSTÄ?
Asteikko 4-10 / En osaa sanoa

4) Millaiseksi arvioitte julkisten toimijoiden muodostaman kokonaisuuden innovaatiojärjestelmässä?
Erittäin yksinkertainen / Melko yksinkertainen / Melko monimutkainen / Erittäin monimutkainen / En osaa sanoa

5) Kuinka tärkeinä pidätte OMAN ORGANISAATIONNE näkökulmasta seuraavia Suomen innovaatiojärjestelmän julkisia toimijoita?

	Ei lainkaan tärkeä	Ei kovin tärkeä	Melko tärkeä	Erittäin tärkeä	En osaa sanoa
Tekes	O	O	O	O	O
Sitra	O	O	O	O	O
Suomen Akatemia	O	O	O	O	O
Työ ja elinkeinoministeriö	O	O	O	O	O
Opetusministeriö	O	O	O	O	O
Sosiaali ja terveysministeriö	O	O	O	O	O
Valtiovarainministeriö	O	O	O	O	O
Muut ministeriöt	O	O	O	O	O
VTT	O	O	O	O	O
Muut julkiset tutkimuslaitokset	O	O	O	O	O
Finpro	O	O	O	O	O
Keksintösäätiö	O	O	O	O	O
Yliopistot ja tiedekorkeakoulut	O	O	O	O	O
Ammattikorkeakoulut	O	O	O	O	O
Paikalliset TE-keskukset	O	O	O	O	O
Finnvera	O	O	O	O	O
Teollisuussijoitus	O	O	O	O	O
Osaamis- tai teknologiakeskukset	O	O	O	O	O
Tiede ja teknologianeuvosto*	O	O	O	O	O

*Nykyinen nimi: Tutkimus ja innovaationeuvosto.

6) Usein innovaatiopolitiikka nähdään teknologiavetoisena TAI kysyntä ja käyttäjälähtöisenä. Millaisena näette Suomen innovaatiopolitiikan?
Vastaajat arvioivat asteikolla 1-5
Täysin teknologiavetoinen) 1 2 3 4 5 (Täysin kysyntä- ja käyttäjälähtöinen)

7) Innovaatiojärjestelmässä korkeakouluilla ja julkisilla tutkimuslaitoksilla on omat tehtävänsä. Valitse, JOS kyseiset toimijat hoitavat seuraavia tehtäviä HYVIN.

	Kansainvälinen huippu-tutkimus	Tutkimus kotimaisiin tarpeisiin	Osaajia kansainvälisen liiketoiminnan. tarpeisiin	Osaajia paikallisen elinkeinoelämän tarpeisiin
Yliopistot ja tiedekorkeakoulut	☐	☐	☐	☐
Ammattikorkeakoulut	☐	☐	☐	☐
Julkiset tutkimuslaitokset	☐	☐	☐	☐

8) Innovaatiojärjestelmän yhtenä tavoitteena on edistää kasvuyrittäjyyttä ja luoda Suomeen nopeasti kasvavia yrityksiä. Minkä arvosanan annatte järjestelmän onnistumiselle tässä tehtävässä?
Asteikko 4-10 / En osaa sanoa

9) Katsotteko, että harjoitetulla innovaatiopolitiikalla hoidetaan myös ALUEPOLIITTISIA tavoitteita?
Kyllä / Ei / En osaa sanoa

10) Onko KANSALLISEN tason innovaatiopolitiikka mielestänne yhtä tehokasta Suomen eri alueilla?
Kyllä / Ei / En osaa sanoa

VERKOSTOITUMISELLA tarkoitetaan pidempiaikaista kumppanuutta, jossa tavoitellaan yhteistä hyötyä tietoja vaihtamalla sekä kunkin osaamista tai muita resursseja yhdistelemällä.

11) Kuinka tärkeitä KANSALLISET verkostot ovat organisaationne toiminnassa?
Ei lainkaan tärkeä / Ei kovin tärkeä / Melko tärkeä / Erittäin tärkeä / En osaa sanoa

12) Kuinka tärkeitä KANSAINVÄLISET verkostot ovat organisaationne toiminnassa?
Ei lainkaan tärkeä / Ei kovin tärkeä / Melko tärkeä / Erittäin tärkeä / En osaa sanoa

13) Mitä mieltä olette seuraavista väittämistä?

Tuleva YLIOPISTOUUDISTUS edistää ...	Täysin eri mieltä	Melko eri mieltä	Melko samaa mieltä	Täysin samaa mieltä	En osaa sanoa
... kansainvälistymistä.	O	O	O	O	O
... opetuksen laatua.	O	O	O	O	O
... tutkimuksen laatua.	O	O	O	O	O
... yhteiskunnallista vaikuttavuutta.	O	O	O	O	O
Strategisen huippuosaamisen keskittymät (SHOK) edistävät järjestelmän toimintaa.	O	O	O	O	O
Sektoritutkimuslaitosten mahdollinen uudistaminen edistäisi järjestelmän toimintaa.	O	O	O	O	O
Yliopistokeksintölain muutos helpottaa yhteistyötä yritysten ja korkeakoulujen välillä.	O	O	O	O	O

2. Vain YRITYKSILLE esitetyt kysymykset

14) Mistä yrityksenne tulot pääosin tulevat?
Kuluttajilta / Valtion tai kunnan toimijoilta / Yksityisiltä yrityksiltä tai yhteisöiltä / En osaa sanoa

15) Mikä on yrityksenne pääasiallinen asema toimitusketjussa?
Vastaajat valitsivat YHDEN alla olevista vaihtoehdoista.

- O Päähankkija: Suunnittelusta vastaava lopputuotteen/ palvelun myyjä.
- O Järjestelmätoimittaja: Tarjoaa kokonaisuuksia päähankkijoille.
- O Alihankkija: Tuotteet/palvelut osaksi asiakkaan tarjontaan.
- O En osaa sanoa

16) Kuinka tärkeitä seuraavat seikat ovat toimintanne kannalta?

	Ei lainkaan tärkeä	Ei kovin tärkeä	Melko tärkeä	Erittäin tärkeä	En osaa sanoa
Yleinen myönteinen suhtautuminen riskinottoon	O	O	O	O	O
Riskirahan saatavuus	O	O	O	O	O
Kannustava yritys ja pääomaverotus	O	O	O	O	O
Julkisten hallinnollisten menettelyjen keveys	O	O	O	O	O
Julkisen sektorin neuvonta ja tiedontarjonta	O	O	O	O	O
Julkisen sektorin rahallinen tuki	O	O	O	O	O
Korkeakoulujen valmius yritysyhteistyöhön	O	O	O	O	O

17) Yksi järjestelmän tärkeimmistä tehtävistä on YKSITYISEN yritys- ja innovaatiotoiminnan edistäminen. Tästä näkökulmasta, millaiseksi arvioitte innovaatiojärjestelmän kokonaisuuden?
Erittäin yksinkertainen / Melko yksinkertainen / Melko monimutkainen / Erittäin monimutkainen / En osaa sanoa

18) Nopeasti kasvavien yrityksien syntyä voitaisiin tukea antamalla niiden tuleviin voittoihin ja voitonjakoon kohdistuvia verohelpotuksia. Kuinka tehokas tapa tämä olisi kasvattaa kasvuyrityksien määrää?
Ei lainkaan tehokas / Ei kovin tehokas / Melko tehokas / Erittäin tehokas / En osaa sanoa

INNOVAATIOTOIMINTA tähtää uusien tai olennaisesti parannettujen tuotteiden, palveluiden tai tuotanto ja jakelumenetelmien keksimiseen tai käyttöönottoon.

19) Onko yrityksenne harjoittanut innovaatiotoimintaa viimeisen kolmen vuoden aikana?
Kyllä / Ei / En osaa sanoa

Vastaajat valitsivat yhden yllä olevista vaihtoehdoista. Tämä kysymys jakaa vastaajat - KYLLÄ ja EN OSAA SANOA vastanneet vastasivat myös loppuihin yritysosion kysymyksiin:

20) Kuinka tärkeitä seuraavat SUOMESSA sijaitsevat toimijat ovat yrityksenne innovaatiotoiminnan kannalta?

	Ei lainkaan tärkeä	Ei kovin tärkeä	Melko tärkeä	Erittäin tärkeä	En osaa sanoa
Oman yrityksen/konsernin työntekijät	O	O	O	O	O
Laite ja materiaalitoimittajat	O	O	O	O	O
Asiakasyritykset	O	O	O	O	O
Kuluttajat/loppukäyttäjät	O	O	O	O	O
Kunta tai valtio	O	O	O	O	O
Kilpailijat	O	O	O	O	O
Konsultit/Konsulttiyritykset	O	O	O	O	O
Yksityiset tutkimuslaitokset	O	O	O	O	O
Julkiset tutkimuslaitokset	O	O	O	O	O
Yliopistot ja tiedekorkeakoulut	O	O	O	O	O
Ammattikorkeakoulut	O	O	O	O	O

21) Kuinka merkittäviä seuraavat ULKOMAILLA sijaitsevat toimijat ovat yrityksenne innovaatiotoiminnan kannalta?

	Ei lainkaan tärkeä	Ei kovin tärkeä	Melko tärkeä	Erittäin tärkeä	En osaa sanoa
Oman yrityksen/konsernin työntekijät	O	O	O	O	O
Laite ja materiaalitoimittajat	O	O	O	O	O
Asiakasyritykset	O	O	O	O	O
Kuluttajat/loppukäyttäjät	O	O	O	O	O
Kunta tai valtio	O	O	O	O	O
Kilpailijat	O	O	O	O	O
Konsultit/Konsulttiyritykset	O	O	O	O	O
Yksityiset tutkimuslaitokset	O	O	O	O	O
Julkiset tutkimuslaitokset	O	O	O	O	O
Yliopistot ja tiedekorkeakoulut	O	O	O	O	O
Ammattikorkeakoulut	O	O	O	O	O

22) Mitkä seuraavista kuvaavat loppukäyttäjien rooleja innovaatiotoiminnassanne?
Vastaajat valitsivat YHDEN tai USEAMPIA alla olevista vaihtoehdoista.

- ☐ Ei merkittävää roolia.
- ☐ Säännöllisen markkinatutkimuksen kohde (esim. asiakaskyselyt).
- ☐ Antavat aktiivisesti ja jatkuvasti tietoja muuttuvista tarpeistaan.
- ☐ Osallistuvat omalla asiantuntemuksellaan itse kehitystyöhön.

23) Onko jokin yrityksenne keskeinen investointihanke, t&k, markkinointi, tai muu vastaava projekti lykkääntynyt tai peruuntunut rahoitusmarkkinakriisin johdosta?
Kyllä / Ei / En osaa sanoa

3. Vain JULKISILLE TOIMIJOILLE esitetyt kysymykset

14) Mitä seuraavista palveluista ORGANISAATIONNE tarjoaa muille innovaatio-järjestelmän toimijoille? *Vastaajat valitsivat YHDEN tai USEAMPIA alla olevista vaihtoehdoista.*

- ☐ Rahoitus (avustukset, tuet, lainat, takaukset tai pääomasijoitukset)
- ☐ Neuvonta ja tietopalvelut
- ☐ Ihmisten kansainvälisen liikkuvuuden edistäminen
- ☐ Yritysten kansainvälistyminen
- ☐ Koulutus ja tutkimuspalvelut

15) Koetteko, että muut JULKISET toimijat tarjoavat samanlaisia palveluita kuin organisaationne?
Kyllä / Ei / En osaa sanoa

16) Koetteko, että muut YKSITYISET toimijat tarjoavat samanlaisia palveluita kuin organisaationne?
Kyllä / Ei /En osaa sanoa

17) Koetteko, että yhteistyö palveluntarjoajien kesken on sujuvaa?
Kyllä / Ei / En osaa sanoa

18) Kenen palveluntarjoajan kanssa yhteistyö on erityisen SUJUVAA? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

19) Kenen palveluntarjoajan kanssa yhteistyö on erityisen HAASTEELLISTA? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

HENKILÖTYÖVUODELLA tarkoitetaan yhden henkilön säännöllistä vuosityöaikaa.

20) Montako henkilötyövuotta organisaationne KOTIMAISISSA yksiköissä tehtiin vuonna 2008?
Avoin kenttä

21) Montako henkilötyövuotta organisaationne ULKOMAISISSA yksiköissä tehtiin vuonna 2008?
Avoin kenttä

INNOVAATIOTOIMINTA tähtää uusien tai olennaisesti parannettujen tuotteiden, palveluiden tai tuotanto ja jakelumenetelmien keksimiseen tai käyttöönottoon.

22) Montako henkilötyövuotta organisaatiossanne käytettiin innovaatiotoimintaan ja/tai sen edistämiseen vuonna 2008?
Avoin kenttä

23) Mikä osa SUOMEN henkilöstöstänne on suorittanut YLIOPISTO tai tiedekorkea-koulututkinnon?
0% / 1-25% / 26-50% / 51-75% / 76-100% / En osaa sanoa

24) Mikä osa SUOMEN henkilöstöstänne on suorittanut TEKNISEN YLIOPISTO tai tiedekorkeakoulututkinnon?
0% / 1-25% / 26-50% / 51-75% / 76-100% / En osaa sanoa

25) Ketkä ovat pääasialliset rahoituksenne tai palveluidenne käyttäjät?
Vastaajat valitsivat YHDEN tai USEAMPIA vaihtoehtoja.

- ☐ Yksityiset yritykset
- ☐ Yksityiset tutkimuslaitokset
- ☐ Yksityiset muut organisaatiot
- ☐ Yksityiset henkilöt
- ☐ Opetus/tutkimus: Yliopistot ja tiedekorkeakoulut
- ☐ Opetus/tutkimus: Ammattikorkeakoulut
- ☐ Opetus/tutkimus: Muut oppilaitokset
- ☐ Julkiset: Tutkimuslaitokset
- ☐ Julkiset: Kunnat
- ☐ Julkiset: Muut alueelliset toimijat (TE-keskukset, Osaamis- ja teknologiakeskukset, yms.)
- ☐ Julkiset: Muut kansallisen tason toimijat

26) Yksi järjestelmän tärkeimmistä tehtävistä on YKSITYISEN yritys ja innovaatio-toiminnan edistäminen. Tästä näkökulmasta, millaiseksi arvioitte innovaatio-järjestelmän kokonaisuuden?
Erittäin yksinkertainen / Melko yksinkertainen / Melko monimutkainen / Erittäin monimutkainen / En osaa sanoa

27) Miten hyvin VALTION sektoritutkimuslaitokset vastaavat organisaationne tieto-tarpeisiin?
Ei lainkaan / Ei kovin hyvin / Melko hyvin / Erittäin hyvin/ En osaa sanoa

28) Miten hyvin YKSITYISET tutkimuslaitokset vastaavat organisaationne tieto-tarpeisiin?
Ei lainkaan / Ei kovin hyvin / Melko hyvin / Erittäin hyvin / En osaa sanoa

29) Miten hyvin KORKEAKOULUT vastaavat organisaationne tietotarpeisiin?
Ei lainkaan / Ei kovin hyvin / Melko hyvin / Erittäin hyvin / En osaa sanoa

30) Uusi kansallinen innovaatiostrategia julkaistiin 6/2008 ja innovaatiopoliittinen selonteko annettiin eduskunnalle 10/2008. Millä tavalla organisaationne on reagoinut niihin?
Vastaajat valitsivat YHDEN vaihtoehdoista.

- o Organisaatiossa ei ole tutustuttu strategiaan/selontekoon.
- o Yksittäiset henkilöt ovat tutustuneet oman mielenkiintonsa pohjalta.
- o Aiheeseen liittyen on pidetty virallisia kokouksia.
- o Aiheeseen liittyen on käynnistetty virallinen suunnitteluprosessi.
- o Niiden pohjalta on tehty JOITAIN käytännön toimenpiteitä.
- o Niiden pohjalta on tehty USEITA käytännön toimenpiteitä.
- o Niiden aiheuttamat toimenpiteet ovat jo kokonaisuudessaan läpivietyjä.

31) Edellyttääkö strategia/selonteko mielestänne muutoksia organisaationne toiminnassa?
Kyllä / Ei / En osaa sanoa

32) Kuinka paljon strategia/selonteko on auttanut organisaationne toiminnan ohjaamisessa?
Ei lainkaan / Ei kovin paljon / Melko paljon / Erittäin paljon / En osaa sanoa

33) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin VAHVUUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

34) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin HEIKKOUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

35) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin MAHDOL-LISUUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

36) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin UHKA 2010- luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

4. Vain VÄLITTÄJÄORGANISAATIOILLE esitetyt kysymykset

14) Mitä seuraavista palveluista ORGANISAATIONNE tarjoaa muille innovaatio-järjestelmän toimijoille? Vastaajat valitsivat YHDEN tai USEAMPIA vaihtoehtoja.

- ☐ Rahoitus (avustukset, tuet, lainat, takaukset tai pääomasijoitukset)
- ☐ Neuvonta ja tietopalvelut
- ☐ Ihmisten kansainvälisen liikkuvuuden edistäminen
- ☐ Yritysten kansainvälistyminen
- ☐ Koulutus ja tutkimuspalvelut
- ☐ Toimitilat

15) Koetteko, että muut JULKISET toimijat tarjoavat samanlaisia palveluita kuin organisaationne?
Kyllä / Ei / En osaa sanoa

16) Koetteko, että muut YKSITYISET toimijat tarjoavat samanlaisia palveluita kuin organisaationne?
Kyllä / Ei / En osaa sanoa

17) Koetteko, että yhteistyö palveluntarjoajien kesken on sujuvaa?
Kyllä/ Ei / En osaa sanoa

18) Kenen palveluntarjoajan kanssa yhteistyö on erityisen SUJUVAA? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

19) Kenen palveluntarjoajan kanssa yhteistyö on erityisen HAASTEELLISTA? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

HENKILÖTYÖVUODELLA tarkoitetaan yhden henkilön säännöllistä vuosityöaikaa.

20) Montako henkilötyövuotta organisaationne KOTIMAISISSA yksiköissä tehtiin vuonna 2008?
Avoin kenttä

21) Montako henkilötyövuotta organisaationne ULKOMAISISSA yksiköissä tehtiin vuonna 2008?
Avoin kenttä

INNOVAATIOTOIMINTA tähtää uusien tai olennaisesti parannettujen tuotteiden, palveluiden tai tuotantoja jakelumenetelmien keksimiseen tai käyttöönottoon.

22) Montako henkilötyövuotta organisaatiossanne käytettiin innovaatiotoimintaan ja/tai sen edistämiseen vuonna 2008?
Avoin kenttä

23) Mikä osa SUOMEN henkilöstöstänne on suorittanut YLIOPISTO tai tiedekorkea-koulututkinnon?
0% / 1-25% / 26-50% / 51-75% / 76-100% / En osaa sanoa

24) Mikä osa SUOMEN henkilöstöstänne on suorittanut TEKNISEN yliopisto- tai tiede-korkeakoulututkinnon?
0% / 1-25% / 26-50% / 51-75% / 76-100% / En osaa sanoa

25) Ketkä ovat pääasialliset rahoituksenne tai palveluidenne käyttäjät? Vastaajat valitsivat YHDEN tai USEAMPIA vaihtoehtoja.

- ☐ Yksityiset yritykset
- ☐ Yksityiset tutkimuslaitokset
- ☐ Yksityiset muut organisaatiot
- ☐ Yksityiset henkilöt
- ☐ Opetus/tutkimus: Yliopistot ja tiedekorkeakoulut
- ☐ Opetus/tutkimus: Ammattikorkeakoulut
- ☐ Opetus/tutkimus: Muut oppilaitokset
- ☐ Julkiset: Tutkimuslaitokset
- ☐ Julkiset: Kunnat
- ☐ Julkiset: Muut alueelliset toimijat (TE-keskukset, Osaamis- ja teknologiakeskukset, yms.)
- ☐ Julkiset: Muut kansallisen tason toimijat

26) Yksi järjestelmän tärkeimmistä tehtävistä on YKSITYISEN yritys- ja innovaatiotoiminnan edistäminen. Tästä näkökulmasta, millaiseksi arvioitte innovaatiojärjestelmän kokonaisuuden?
Erittäin yksinkertainen / Melko yksinkertainen / Melko monimutkainen / Erittäin monimutkainen / En osaa sanoa

27) Mitkä ovat organisaationne rahoituksen lähteet? Mikäli rahoitusrakenteenne vaihtelee paljon vuodesta toiseen, niin vastatkaa käyttäen viimeisen kolmen vuoden keskiarvoja.
Vastaajat osoittivat kunkin alla luetellun lähteen osuuden asteikolla
0% / 1-25% / 26-50% / 51-75% / 76-100%.

Valtion budjetti
Kunnat
EU
Tekes
Julkiset muut tahot
Yksityiset yritykset
Yksityiset säätiöt
Yksityiset muut tahot

28) Uusi kansallinen innovaatiostrategia julkaistiin 6/2008 ja innovaatiopoliittinen selonteko annettiin eduskunnalle 10/2008. Millä tavalla organisaationne on reagoinut niihin?
Vastaajat valitsivat yhden vaihtoehdoista.

- o Organisaatiossa ei ole tutustuttu strategiaan/selontekoon.
- o Yksittäiset henkilöt ovat tutustuneet oman mielenkiintonsa pohjalta.
- o Aiheeseen liittyen on pidetty virallisia kokouksia.
- o Aiheeseen liittyen on käynnistetty virallinen suunnitteluprosessi.
- o Niiden pohjalta on tehty JOITAIN käytännön toimenpiteitä.
- o Niiden pohjalta on tehty USEITA käytännön toimenpiteitä.
- o Niiden aiheuttamat toimenpiteet ovat jo kokonaisuudessaan läpivietyjä.

29) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin VAHVUUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä.

30) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin HEIKKOUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

31) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin MAHDOLLI-SUUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

32) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin UHKA 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

5. Vain TUTKIMUSLAITOKSILLE esitetyt kysymykset

14) Mitkä ovat organisaationne rahoituksen lähteet? (Mikäli rahoitusrakenteenne vaihtelee paljon vuodesta toiseen, niin vastatkaa koskien keskimäärin viimeisen kolmen vuoden aikana.
Vastaajat osoittivat kunkin alla luetellun lähteen osuuden asteikolla
0% / 1-25% / 26-50% / 51-75% / 76-100%.

Valtion budjetti
Kunnat
EU
Tekes
Julkiset muut tahot
Yksityiset yritykset
Yksityiset säätiöt
Yksityiset muut tahot

15) Missä määrin tutkimuksenne palvelee seuraavia tahoja?
Vastaajat valitsivat jokaista alla lueteltua tahoa kohden YHDEN vaihtoehdoista
Ei lainkaan / Jonkin verran / Melko paljon / Erittäin paljon / En osaa sanoa.

Julkista päätöksentekoa kansallisella tasolla
Julkista päätöksentekoa alueellisella tasolla
Julkista päätöksentekoa kansainvälisellä tasolla
Yrityksiä
Olemme yleishyödyllinen tiedontuottaja

16) Kuinka suuri osuus organisaationne työpanoksesta on ...
Vastaajat osoittivat kullekin alla luetelluista tehtävistä näiden osuuden kokonaistyöpanoksesta asteikolla
0% / 1-25% / 26-50% / 51-75% / 76-100%.

...koulutusta
...tutkimusta
...viranomaistehtävien hoitamista
...tilastotuotantoa
...hallintoa
...muita tehtäviä

17) Miten hyvin katsotte, että te, valtion sektoritutkimuslaitoksena vastaatte isäntä-ministeriönne tietotarpeisiin?
Ei lainkaan / Ei kovin hyvin / Melko hyvin / Erittäin hyvin / En osaa sanoa

18) Miten hyvin katsotte yksityisten tutkimuslaitosten vastaavan isäntäministeriönne tietotarpeisiin?
Ei lainkaan / Ei kovin hyvin / Melko hyvin / Erittäin hyvin / En osaa sanoa

19) Miten hyvin katsotte korkeakoulujen vastaavan isäntäministeriönne tietotarpeisiin?
Ei lainkaan / Ei kovin hyvin / Melko hyvin / Erittäin hyvin / En osaa sanoa

6. Vain YLIOPISTOJEN LAITOSJOHTAJILLE esitetyt kysymykset

14) Kuinka suuri osuus laitoksenne työpanoksesta on ...
Vastaajat osoittivat kullekin alla luetelluista tehtävistä näiden osuuden kokonaistyöpanoksesta asteikolla
0% / 1-25% / 26-50% / 51-75% / 76-100%.

...koulutusta
...tutkimusta
...viranomaistehtävien hoitamista
...tilastotuotantoa
...hallintoa
...muita tehtäviä

15) Kuinka merkittävä rooli seuraavilla tahoilla on ollut kolmen viimeisen vuoden aikana laitoksenne toteuttamissa yhteistyöprojekteissa? *Vastaajat arvioivat alla lueteltujen tahojen merkittävyyttä asteikolla*
Ei merkitystä / Vähän / Melko paljon / Erittäin paljon /En osaa sanoa.

Kotimaiset yliopistot
Ulkomaiset yliopistot
Ammattikorkeakoulut

Julkiset tutkimuslaitokset
Yksityiset tutkimuslaitokset
Avoimet verkkoyhteisöt
Kotimaiset yritykset
Ulkomaiset yritykset

16) Laitoksenne näkökulmasta, ovatko yhteistyöprojektit yritysten kanssa liittyneet seuraaviin tutkimustarpeisiin?
Vastaajat valitsivat jokaista alla lueteltua tutkimustarvetta kohden YHDEN vaihtoehdoista
Kyllä / Ei / En osaa sanoa.

Perustutkimukseen pohjautuva uusien ideoiden etsiminen
Pääsy osaamistanne täydentävään asiantuntemukseen
Tietyn ongelman ratkaiseminen
Prototyypin kehittäminen/testaus
Julkiseen ohjelmaan osallistuminen
Osaavan työvoiman tarjonta
Työntekijöiden täydennyskoulutus

17) Missä määrin KOETTE laitoksenne toiminnan vastaavan seuraaviin YRITYSTEN innovaatiotoiminnan tarpeisiin?
Vastaajat arvioivat omien toimintojensa vastaavuutta alla listattuihin yritystarpeisiin asteikolla
Ei lainkaan / Ei kovin paljon / Melko paljon / Erittäin paljon / En osaa sanoa.

Perustutkimukseen pohjautuva uusien ideoiden etsiminen
Pääsy yrityksen osaamista täydentävään asiantuntemukseen
Tietyn ongelman ratkaiseminen
Prototyypin kehittäminen/testaus
Julkiseen ohjelmaan osallistuminen
Osaavan työvoiman tarjonta
Työntekijöiden täydennyskoulutus

Vain YLIOPISTO- JA AMK-REHTOREILLE esitetyt kysymykset

14) Kuinka suuri osuus korkeakoulunne työpanoksesta on...
Vastaajat osoittivat kullekin alla luetelluista tehtävistä näiden osuuden kokonaistyöpanoksesta asteikolla
0% / 1-25% / 26-50% / 51-75% / 76-100%.

...koulutusta
...tutkimusta
...viranomaistehtävien hoitamista
...tilastotuotantoa
...hallintoa
...muita tehtäviä

15) Kuinka merkittävä rooli seuraavilla tahoilla on ollut kolmen viimeisen vuoden aikana korkeakoulunne toteuttamissa yhteistyöprojekteissa?
Vastaajat arvioivat alla lueteltujen tahojen merkittävyyttä asteikolla
Ei merkitystä / Vähän / Melko paljon / Erittäin paljon /En osaa sanoa.

Kotimaiset yliopistot
Ulkomaiset yliopistot
Ammattikorkeakoulut
Julkiset tutkimuslaitokset
Yksityiset tutkimuslaitokset
Avoimet verkkoyhteisöt
Kotimaiset yritykset
Ulkomaiset yritykset

16) Korkeakoulunne näkökulmasta, ovatko yhteistyöprojektit yritysten kanssa liittyneet seuraaviin tutkimustarpeisiin?
Vastaajat valitsivat jokaista alla lueteltua tutkimustarvetta kohden yhden vaihtoehdoista
Kyllä / Ei / En osaa sanoa.

Perustutkimukseen pohjautuva uusien ideoiden etsiminen
Pääsy osaamistanne täydentävään asiantuntemukseen
Tietyn ongelman ratkaiseminen
Prototyypin kehittäminen/testaus
Julkiseen ohjelmaan osallistuminen
Osaavan työvoiman tarjonta
Työntekijöiden täydennyskoulutus

17) Missä määrin KOETTE korkeakoulunne toiminnan vastaavan seuraaviin YRITYSTEN innovaatiotoiminnan tarpeisiin? *Vastaajat arvioivat omien toimintojensa vastaavuutta alla listattuihin yritystarpeisiin asteikolla*
Ei lainkaan / Ei kovin paljon / Melko paljon / Erittäin paljon / En osaa sanoa.

Perustutkimukseen pohjautuva uusien ideoiden etsiminen
Pääsy yrityksen osaamista täydentävään asiantuntemukseen
Tietyn ongelman ratkaiseminen
Prototyypin kehittäminen/testaus
Julkiseen ohjelmaan osallistuminen
Osaavan työvoiman tarjonta
Työntekijöiden täydennyskoulutus

18) Minkä katsotte olevan KORKEAKOULUNNE merkittävin VAHVUUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

19) Minkä katsotte olevan KORKEAKOULUNNE merkittävin HEIKKOUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

20) Minkä katsotte olevan KORKEAKOULUNNE merkittävin MAHDOLLISUUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

21) Minkä katsotte olevan KORKEAKOULUNNE merkittävin UHKA 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

7. Vain SÄÄTIÖILLE esitetyt kysymykset

5) Millaiseksi näette säätiöiden aseman kehittyvän Suomen innovaatiojärjestelmässä seuraavan viiden vuoden aikana?
Pienentyy / Säilyy ennallaan / Kasvaa / En osaa sanoa

6) Pitäisikö säätiöitä koskevaa lainsäädäntöä muuttaa, jotta säätiöt voisivat nykyistä paremmin tukea tiedettä, taidetta ja tutkimusta?
KYLLÄ -vaihtoehdossa annettiin mahdollisuus avoimeen vastaukseen.
Ei ole tarpeen / Kyllä (millä tavoin?): Avoin kenttä / En osaa sanoa

7) Mitä seuraavista aloista säätiönne tukee?
Vastaajat valitsivat YHDEN tai USEAMPIA vaihtoehtoja.

- ☐ Humanistiset tieteet
- ☐ Yhteiskuntatieteet
- ☐ Luonnontieteet
- ☐ Maa- ja metsätalous
- ☐ Tekniikka
- ☐ Lääketieteet

8) Mitä seuraavista toiminnoista säätiönne PÄÄSÄÄNTÖISESTI tukee (valitkaa yksi)?

- o Tutkimusta Suomessa
- o Tutkimusta ulkomailla
- o Opiskelua Suomessa
- o Opiskelua ulkomailla
- o Konferenssimatkoja
- o Jotakin muuta

9) Mikä on säätiönne jakamien avustusten ja/tai apurahojen kokonaissumma vuonna 2008?
Avoin kenttä
Euroa

10) Kuinka monta henkilöä sai avustuksia ja/tai apurahoja vuonna 2008? (Mukaan lukien tutkimusryhmien sisäiset jäsenet.)
Avoin kenttä
Euroa

11) Yliopistojen laitoskokoa on pidetty pienenä. Olisiko säätiöllänne käsityksenne mukaan valmius lahjoitusprofessuurien perustamiseen, jos valtio antaisi professuuriin lisärahoitusta 2,5 euroa jokaista lahjoituseuroanne kohden?
Ei yhtään / 1-2 professuuria / 3-5 professuuria / Yli 5 professuuria / En osaa sanoa

8. Vain JÄRJESTÖILLE esitetyt kysymykset

14) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin VAHVUUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

15) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin HEIKKOUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

16) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin MAHDOL-LISUUS 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

17) Minkä katsotte olevan Suomen innovaatiojärjestelmän merkittävin UHKA 2010-luvulla? Kirjoita vastaus alla olevaan kenttään.
Avoin kenttä

9. Vain KUNNILLE esitetyt kysymykset

INNOVAATIOTOIMINTA tähtää uusien tai olennaisesti parannettujen tuotteiden, palveluiden tai tuotanto ja jakelumenetelmien keksimiseen tai käyttöönottoon.

14) Onko kunnallanne seuraavia palveluita liittyen kuntanne alueella tapahtuvan INNOVAATIOTOIMINNAN tukemiseen? *Vastaajat valitsivat YHDEN tai USEAMPIA vaihtoehtoja.*

- ☐ Rahoitus (avustukset, tuet, lainat, takaukset tai pääomasijoitukset)
- ☐ Neuvonta- ja tietopalvelut
- ☐ Ihmisten kansainvälisen liikkuvuuden edistäminen
- ☐ Yritysten kansainvälistyminen
- ☐ Koulutus- ja tutkimuspalvelut
- ☐ Toimitilat

15) Onko kunnallanne INNOVAATIOTOIMINTAAN liittyvää strategiaa tai innovaatio-poliittista ohjelmaa?
Kyllä / Ei / En osaa sanoa

16) Kuinka paljon kuntanne käytti OMAA RAHAA innovaatiotoiminnan edistämiseen vuonna 2008?
Avoin kenttä Euroa

17) Kuinka paljon kuntanne käytti OMAN RAHAN LISÄKSI julkista kansallisista tai kansainvälisistä (ml. EU) rahaa innovaatiotoiminnan tukemiseen vuonna 2008?
Avoin kenttä Euroa

18) Mikä oli kuntanne kokonaisbudjetti vuonna 2008?
Avoin kenttä Euroa

19) Onko kuntanne hankinnoissa sovellettu PALVELUN TAI TAVARANTOIMITTAJAN innovatiivisuutta hankinta-kriteerinä?
Ei koskaan / Harvoin / Usein / Aina / En osaa sanoa

20) Näettekö, että julkisilla hankinnoilla voidaan vaikuttaa innovaatiotoiminnan edistämiseen?
Kyllä / Ei / En osaa sanoa

10. Vain PÄÄOMASIJOITTAJILLE ja YRITYSENKELEILLE esitetyt kysymykset

14) Yksi järjestelmän tärkeimmistä tehtävistä on YKSITYISEN yritys- ja innovaatiotoiminnan edistäminen. Tästä näkökulmasta, millaiseksi arvioitte innovaatiojärjestelmän kokonaisuuden?
Erittäin yksinkertainen / Melko yksinkertainen / Melko monimutkainen / Erittäin monimutkainen / En osaa sanoa

15) Nopeasti kasvavien yrityksien syntyä voitaisiin tukea antamalla niiden tuleviin voittoihin ja voitonjakoon kohdistuvia verohelpotuksia. Kuinka tehokas tapa tämä olisi kasvattaa kasvuyrityksien määrää?
Ei lainkaan tehokas / Ei kovin tehokas / Melko tehokas / Erittäin tehokas / En osaa sanoa

16) Koetteko, että muut JULKISET toimijat tarjoavat samanlaisia palveluita kuin organisaationne?
Kyllä / Ei / En osaa sanoa

17) Uusi kansallinen innovaatiostrategia julkaistiin 6/2008 ja innovaatiopoliittinen selonteko annettiin eduskunnalle 10/2008. Oletteko tutustuneet niihin?
Kyllä / Ei / En osaa sanoa

18) Arvioikaa, kuinka monessa (rahoittamassanne) asiakasyrityksessänne on keskeinen investointihanke, t&k-, markkinointi-, tai muu vastaava projekti lykkääntynyt tai peruuntunut rahoitusmarkkinakriisin johdosta?
0% / 1-25% / 26-50% / 51-75% / 76-100% / En osaa sanoa

19) Onko kriisi muuttanut teille tulleiden rahoituspyyntöjen määrää?
Lisääntyneet selvästi / Lisääntyneet jonkin verran / Ei muutosta / Vähentyneet jonkin verran / Vähentyneet selvästi / En osaa sanoa

20) Onko rahoituspyyntöjen laatu (rahoituskelpoisuus/riski) muuttunut kriisin johdosta?
Huonontuneet selvästi / Huonontuneet jonkin verran / Ei muutosta / Parantuneet jonkin verran / Parantuneet selvästi / En osaa sanoa

21) Oletteko muuttaneet omia sijoitus- / rahoituskriteereitänne kriisin vuoksi?
Kiristyneet / Ei muutosta / Löystyneet / En osaa sanoa

Vastatessanne seuraavaan kysymykseen, ajatelkaa yritysrahoituksen tarjontaa ja kysyntää NORMAALIolosuhteissa eli tämänhetkisen rahoituskriisin rauettua.

22) Syrjäyttääkö (on yksityistä korvaavaa) vai täydentääkö (on yksityistä tukevaa) julkinen yritysrahoitus ja yritystuet teidän toimintaanne yksityisenä rahoituksen tarjoajana?
Vastaajat arvioivat vaikutuksia asteikolla 1-5

Syrjäyttää merkitsevästi 1 2 3 4 5 Täydentää merkitsevästi

11. Vain PANKEILLE esitetyt kysymykset (Pankeille ei esitetty ensimmäistä 13 kysymystä)

1) Minkä arvosanan annatte Suomen innovaatiojärjestelmälle TÄLLÄ HETKELLÄ?
Asteikko 4-10 / En osaa sanoa

2) Innovaatiojärjestelmän yhtenä tavoitteena on edistää kasvuyrittäjyyttä ja luoda Suomeen nopeasti kasvavia yrityksiä. Minkä arvosanan annatte järjestelmän onnistumiselle tässä tehtävässä?
Asteikko 4-10 / En osaa sanoa

3) Yksi järjestelmän tärkeimmistä tehtävistä on YKSITYISEN yritys- ja innovaatiotoiminnan edistäminen. Tästä näkökulmasta, millaiseksi arvioitte innovaatiojärjestelmän kokonaisuuden?
Erittäin yksinkertainen / Melko yksinkertainen / Melko monimutkainen / Erittäin monimutkainen / En osaa sanoa

4) Nopeasti kasvavien yrityksien syntyä voitaisiin tukea antamalla niiden tuleviin voittoihin ja voitonjakoon kohdistuvia verohelpotuksia. Kuinka tehokas tapa tämä olisi kasvattaa kasvuyrityksien määrää?
Ei lainkaan tehokas / Ei kovin tehokas / Melko tehokas / Erittäin tehokas / En osaa sanoa

5) Koetteko, että muut JULKISET toimijat tarjoavat samanlaisia palveluita kuin organisaationne?
Kyllä / Ei / En osaa sanoa

6) Arvioikaa, kuinka monessa (rahoittamassanne) asiakasyrityksessänne on keskeinen investointihanke, t&k-, markkinointi-, tai muu vastaava projekti lykkääntynyt tai peruuntunut rahoitusmarkkinakriisin johdosta?
0% / 1-25% / 26-50% / 51-75% / 76-100% / En osaa sanoa

7) Onko kriisi muuttanut teille tulleiden rahoituspyyntöjen määrää?
Lisääntyneet selvästi / Lisääntyneet jonkin verran / Ei muutosta / Vähentyneet jonkin verran / Vähentyneet selvästi / En osaa sanoa

8) Onko rahoituspyyntöjen laatu (rahoituskelpoisuus/riski) muuttunut kriisin johdosta?
Huonontuneet selvästi / Huonontuneet jonkin verran / Ei muutosta / Parantuneet jonkin verran / Parantuneet selvästi / En osaa sanoa

9) Oletteko muuttaneet omia sijoitus- / rahoituskriteereitänne kriisin vuoksi?
Kiristyneet / Ei muutosta / Löystyneet / En osaa sanoa

Vastatessanne seuraavaan kysymykseen, ajatelkaa yritysrahoituksen tarjontaa ja kysyntää NORMAALIolosuhteissa eli tämänhetkisen rahoituskriisin rauettua.

10) Syrjäyttääkö (on yksityistä korvaavaa) vai täydentääkö (on yksityistä tukevaa) julkinen yritysrahoitus ja yritystuet teidän toimintaanne yksityisenä rahoituksen tarjoajana?
Vastaajat arvioivat vaikutuksia asteikolla 1-5

Syrjäyttää merkitsevästi 1 2 3 4 5 Täydentää merkittävästi