



**HORIZON**   
*Zuidoost-Nederland*

Eindhoven Region, **South-east Netherlands**

Environment

People

Technology

# Top Technology

## Crossing borders, moving frontiers



## Colophon

Eindhoven Region, South-east Netherlands  
Top technology  
Crossing borders, moving frontiers

Publication of the programme agency Horizon  
December 2003

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The Horizon Programme is a strategic action plan to strengthen the economic structure of the Eindhoven Region over the medium term. It is initiated by the Eindhoven Regional Government (SRE) and the programme management is executed by NV REDE, the Economic Development Agency for the Eindhoven Region.

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# Leading in technology

*The South-east Netherlands is a centre of gravity in top technology. The economic identity of the region is defined by high-tech research and development and production activities. The region is one of the “technology and innovative hotspots” in Europe, with strongly developed private R&D activities, the highest patent density in Europe and a strong knowledge infrastructure of top quality.*

This booklet provides an overview to the “top technology landscape” in the South-east Netherlands with the Eindhoven region as a nucleus.

The economic clusters in the region - mechatronics, automotive, medical technology and IT- have developed prosperously. New technology areas, such as embedded systems<sup>1</sup>, nanotechnology<sup>2</sup> and life-sciences are explored, developed and applied. There is also a rapidly growing number of design activities and a strong development of the creative industry. These clusters flourish, not only through cooperation between companies, but they take advantage of the solid knowledge base that has broadened and deepened over the last decade with

1) Systems in which the architecture for hardware and software is integrated in one function.

2) Technology based on the control and manipulation of individual atoms and molecules

the growth of the Eindhoven University of Technology (TU/e) and the growing number of research institutes.

The Eindhoven region, South-east Netherlands, is part of a larger area in which activities to develop business and scientific technology, in relation to the knowledge intensive manufacturing industry, have become intertwined in a tight international network of business and scientific relationships.

To create effective and efficient Research & Development and to speed up innovation processes leading companies adopt 'open innovation'. The region offers such an environment e.g. on the Philips High Tech Campus, a business park with state-of-the-art facilities for business development and the acceleration of innovation by prototyping, design and technical support.

The region's unique position is acknowledged by the Ministry of Economic Affairs in the concept GEP\* paper. Hence the goal is to strengthen the business climate for top technology companies and to enhance the technological know-how to provide companies and institutions with the conditions to strengthen their knowledge and supply chains, so new relations between technologies and industries can flourish.

The permanent search for improving competitiveness provides a base for new networks and alliances and means they cross borders and move frontiers on a geographical, scientific and technical scale.

The close cooperation between the private sector, knowledge institutions and the government fuels the drive to excel as a top technology region. The economic agenda has been agreed and is understood by all parties: competitiveness through TOP TECHNOLOGY.

\* The GEP paper addresses the differences in regional economic perspectives in the Netherlands and focuses on the support and/or allocation of projects of national economic interest.

The South-east Netherlands is an area spread across two southern Dutch provinces: the eastern part of the province of Noord Brabant and the whole province of Limburg. In statistical terms the provinces are indicated as EU-NUTS2 regions.

The South-east-Netherlands is an economically coherent area that consists of five statistical regions (EU-NUTS3 level or Dutch COROP Regions):

- North-east Brabant  
(625,836 inhabitants)
- South-east Brabant, referred to as the Eindhoven region  
(719,158 inhabitants)
- Northern Limburg  
(276,488 inhabitants)
- Central Limburg  
(220,725 inhabitants)
- Southern Limburg  
(646,083 inhabitants)

The statistics in this publication focus on gross domestic product (GDP), labour force, manufacturing industry, technology, R&D, innovation, scientific performance & patents, business start-ups, creative industry and four important industry clusters: medical technology, ICT, automotive and mechatronics.

Statistics are presented in different ways:

- NUTS2 levels,
- NUTS3 levels
- aggregated and combined NUTS2 and NUTS3 levels
- the regions of the South-east Netherlands as a whole.
- facts and figures are compared with Dutch national statistics and/or European benchmarks.



## Economic profile

The graphics and statistics, obtained from various independent sources, illustrate and underline the technology profile of the South-east Netherlands in general and point out the special position and importance of the Eindhoven region as a centre of gravity in technology.

In the Eindhoven region the considerable presence of the electro-technical industry in particular and the related high concentration of research and development activities contribute positively to the development of business services and the transport-and-distribution sector. Design activities thrive as well. The large number of international businesses with offices here attests to Eindhoven's attractiveness as a place to establish international premises.

Industry provides over 20% of the available jobs, making the region the manufacturing industry centre of the Netherlands. Key industrial clusters include mechatronics and the automotive industry.

New sectors are medical technology and information technology (ICT).

Research-and-development activities are particularly prevalent in the region. Of the total amount spent annually on research and development in the Netherlands, some 45% originates in the South-east Netherlands.

The region focuses on and wants to increase its leading position in technology and knowledge. An opportunity in the global trend towards a knowledge-and-network economy is provided by the vicinity of three centres of gravity in top technology:

- Eindhoven
- Leuven
- The Meuse-Rhine Triangle (Maastricht, Liege, Aachen).



The Horizon Programme is a strategic action plan to strengthen the economic structure of the Eindhoven Region over the medium term. This region is the heart of the Southeast Netherlands economic entity. Its mission is to change from industrial mainport to top technology region, with the emphasis on people and technology. Its objectives are:

1. To reduce structural shortages in the labour market
2. To increase the return on knowledge by strengthening innovation and market competencies
3. To reduce sensitivity to market fluctuations through diversification
4. To improve the international profile of the region

These objectives have been translated into three programme themes: Environment, People, Technology. The statistics in this publication address these themes.

Twenty projects were formulated at the outset based on the programme themes. Projects are set in motion through close cooperation of the triumvirate of government, business world and knowledge institutions. Evidently connections are made with initiatives and projects of economic development cooperations in Noord Brabant and Limburg (NV BOM and NV Liof).

Some projects are already successfully in operation, e.g.:

- Incubator 3+: a concept to stimulate and facilitate technostarters by clustering new and existing facilities such as (pre)seed capital, coaching, networks, management traineeships and a progression concept in housing.
- Metal house: fostering cooperation and knowledge development in the field of commerce and technique for and by entrepreneurs in the metal and metal-electro sector.

# Environment



*The South-east Netherlands has an excellent geographical location in north-west Europe between the economic core regions of the Rhine-Ruhr area in Germany, the Amsterdam-Rotterdam area in the Netherlands, the Antwerp-Brussels area in Belgium and northern France.*

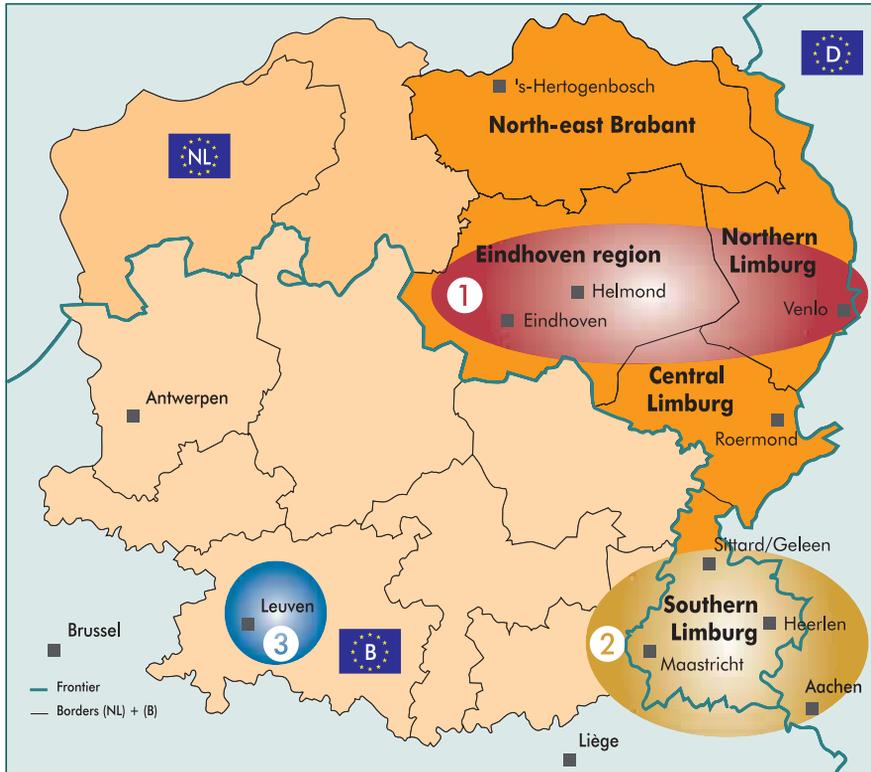
*The region offers a perfect business climate for the manufacturing industry, top technology companies and research institutes. The region focuses on and wants to increase its leading position in technology and knowledge. Close cooperation in the triple helix (business world, knowledge institutes and government) functions as a catalyst for economic development.*

# South-east Netherlands: a European region



South-east Netherlands

## South-east Netherlands: a European region



## International renown knowledge and research institutes



### 1 Eindhoven University of Technology

Fontys Polytechnic  
Philips High-Tech Campus  
Philips Natlab - Philips Research  
Philips Medical Systems  
ASML  
TNO Industry: Independent R&D organisation  
TNO Automotive: Independent R&D organisation  
Océ  
BETA: Research institute for Operations Management and Logistics  
CEBRA: Centre for Electronic Business Research & Applications  
COBRA/NRC Photonics: Communication Technology Basic  
Research and Applications  
DPI: Dutch Polymer Institute  
ECIS: Eindhoven Centre for Innovation Studies  
ESI: Embedded Systems Institute  
Eurandom: European Unit for Research and Analysis of  
Non-Deterministic Operational Models  
ITEA: International Technology Education Association  
Knowledge centre for Mechatronics (Fontys)  
Kennisswijk  
Mikro Centre Netherlands  
NRSC Catalysis

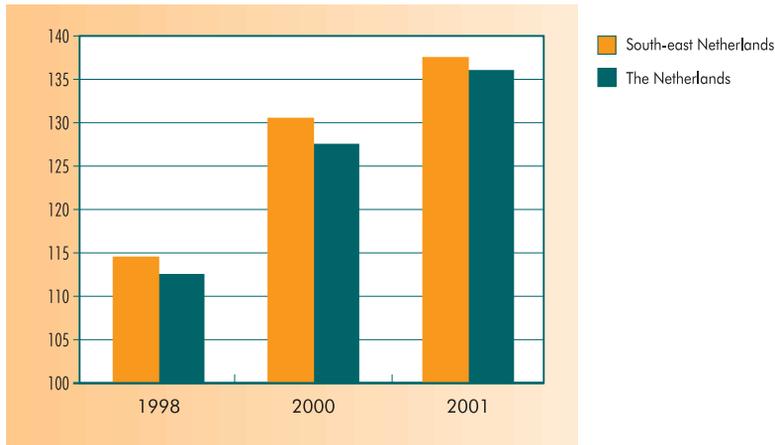
### 2 University Maastricht Limburg University Centre

University of Liège  
Hogeschool Zuyd  
Open University of the Netherlands  
Transnational University Limburg (LUC-Univ.Maastricht)  
Rheinisch-Westfälische Technische Hochschule Aachen  
Fraunhofer  
Fachhochschule Aachen  
Forschungszentrum Juelich (KFA)  
Kompetenznetz "Informatik/IT Aachen"  
Aachener Kompetenzzentrum Medizintechnik AKM  
Competence Centre Automotive Region Aachen  
Kompetenzzentrum für Biowerkstoffe Aachen (bwA)  
Kompetenzzentrum für Prozesssimulation der RWTH Aachen  
Kunststoffinnovationszentrum Aachen  
Lasertechnik in Aachen  
Philips Research Aachen  
Academic Hospital Maastricht  
Deutsches Woll Forschungsinstitut  
Helmholz Institute  
DSM

### 3 KU-leuven, Knowledge from Genomics up to Electronics IMEC Institute for Materials Research (Diepenbeek-LUC) Philips Research Labs Leuven Philips Semiconductors and Digital Systems

## High-tech, high growth!

The South-east region contributes considerably to the national economy with an economic growth (gross regional product) exceeding the Dutch average. At EUR 27,000/capita, the GRP/capita ratio for the Eindhoven region equals the Dutch national GDP/capita ratio.



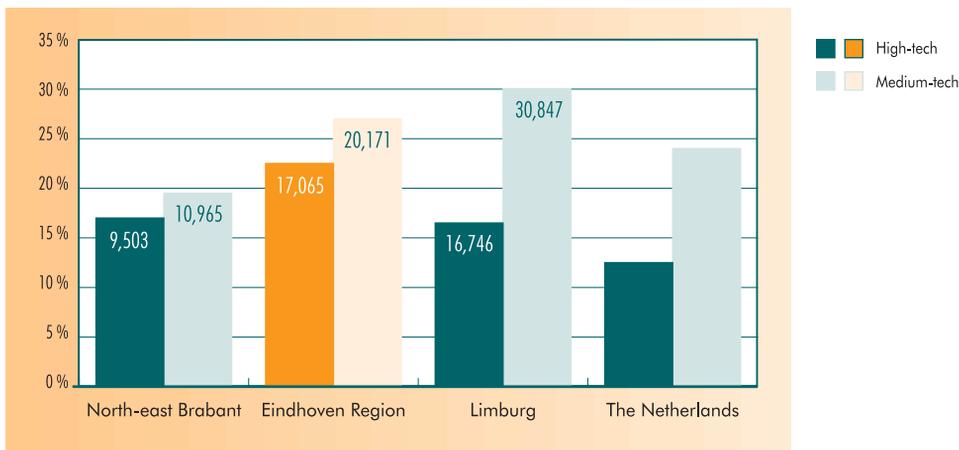
Development Gross Regional Product (GRP) and  
Gross Domestic Product (GDP) (index 1996 = 100)

Source: CBS, ETIN Adviseurs 2003

## Manufacturing industry leads



The presence and importance of (manufacturing) industry is clearly recognisable; providing 30% of the Dutch industrial jobs with a share over 20% in the regional employment structure.



Employment in high-tech and medium-tech industrial activities  
South-east Netherlands (in % and number of jobs) 2002

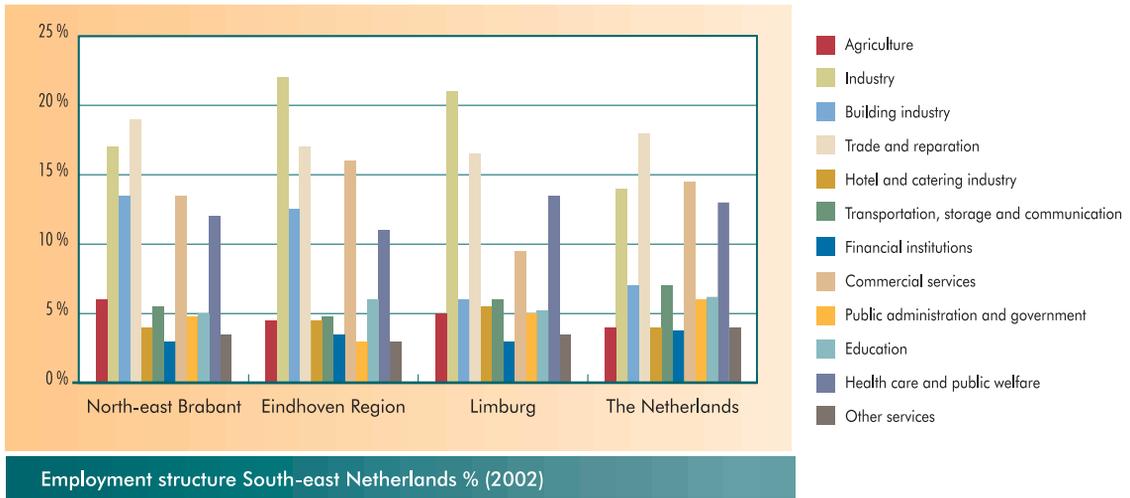
Source: Trade Register Noord  
Brabant, LISA, ETIN Adviseurs

The provinces Noord Brabant and Limburg provide over 20% of the gross domestic product of the Netherlands, 30% of Dutch industrial jobs, 40% of the added value in the manufacturing industry and 50% of Dutch industry expenditure on R&D (source: the Boston Consulting Group), making the South-east region the top technology centre of the Netherlands.



## High-tech and modern industry

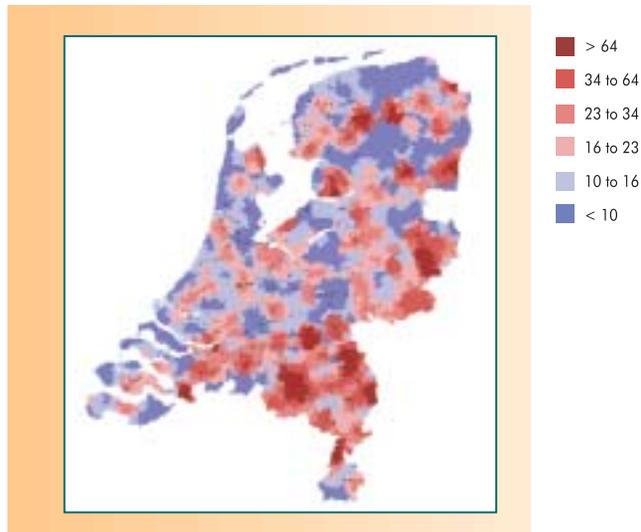
Knowledge and technology are crucial to the South-east region. This is illustrated by the employment figures in medium- and high-tech industry (see chart) and the density of knowledge-intensive jobs in industry in the south-east of the Netherlands (see map).



## High-tech and modern industry



Relative representation knowledge-intensive industry in the Netherlands 2001  
(jobs per 1000 inhabitants aged 15-65 years)

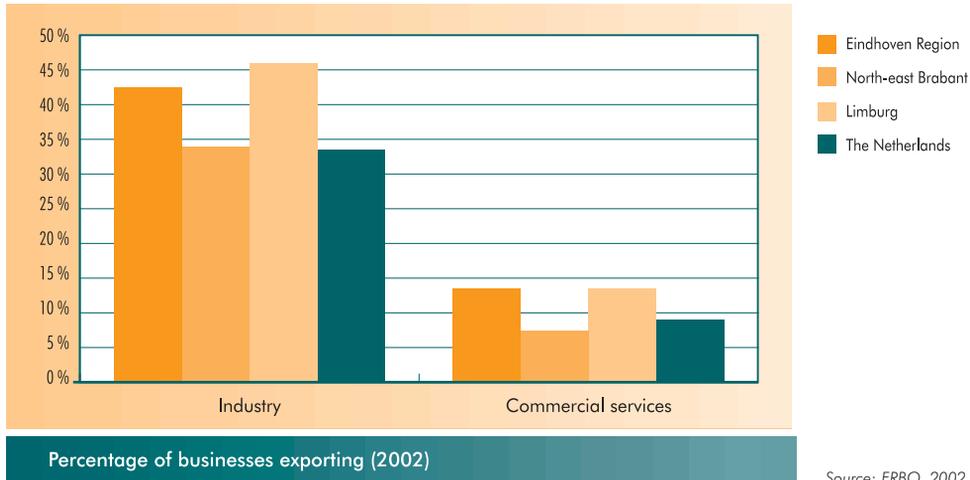


Knowledge intensity in industry (2001)  
(Jobs per 1000 inhabitants aged 15-65 years)

Source: *Economische Hittekaart*, Ministry of Economic Affairs, 2002

## Think global, act local: international orientation

The international business orientation is obvious given the above-average export shares of companies in industry and commercial services.



Source: ERBO, 2002

### International attractiveness

The region's geographic position, its strong industrial base and highly educated workforce attract companies from abroad. Over the last ten years the South-east Netherlands has taken a share of approximately 30% (measured by number of projects, investment volumes and employment) of all new foreign investment in the Netherlands. (Source: NV BOM, NFIA)

# People



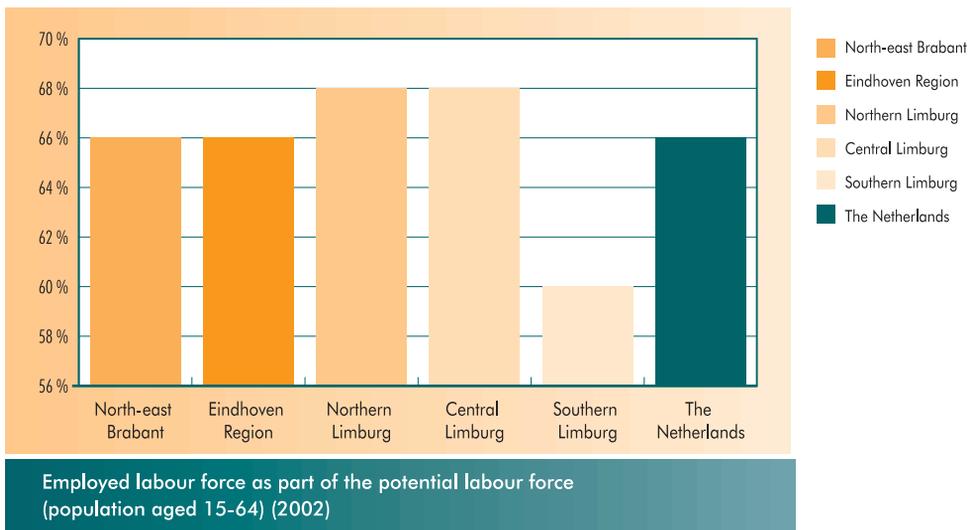
*It's peoples' business. A highly skilled and well educated labour force provides a solid base for productivity and economic growth. Technical competences in combination with commercial skills are becoming the determining factor for economic success. That goes for entrepreneurs and for employees as well. The supply of, and demand for knowledge workers need to be adequately matched. Universities, polytechnics and researchers in the South-east Netherlands are highly regarded.*

*It's important to encourage young people to choose a (research) career in technology subjects and increase the knowledge potential to meet the (future) needs of the regional labour market.*



## Employed labour force

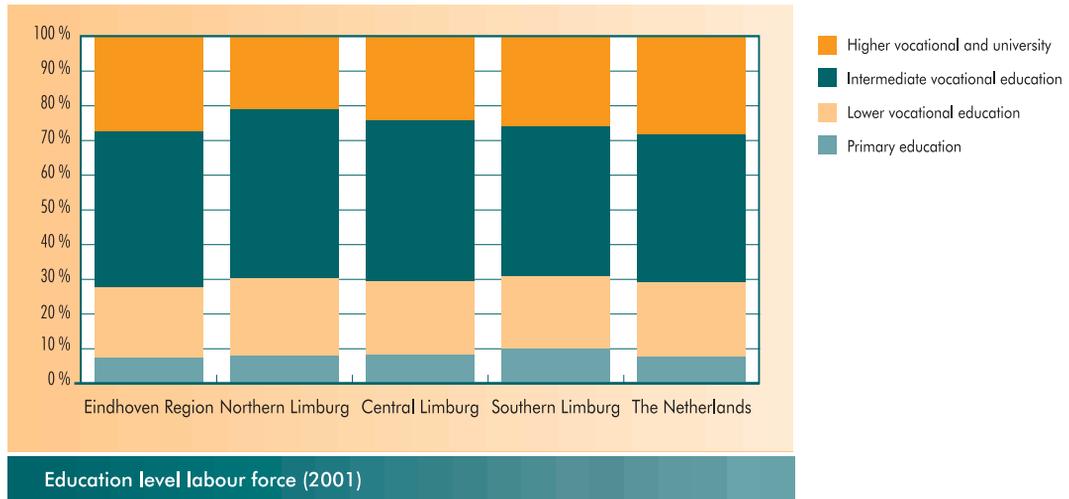
Participation in employment in the South-east region is, for four sub-regions, at or above the national average and is still increasing.



Source: CBS, 2003

## Highly skilled labour force

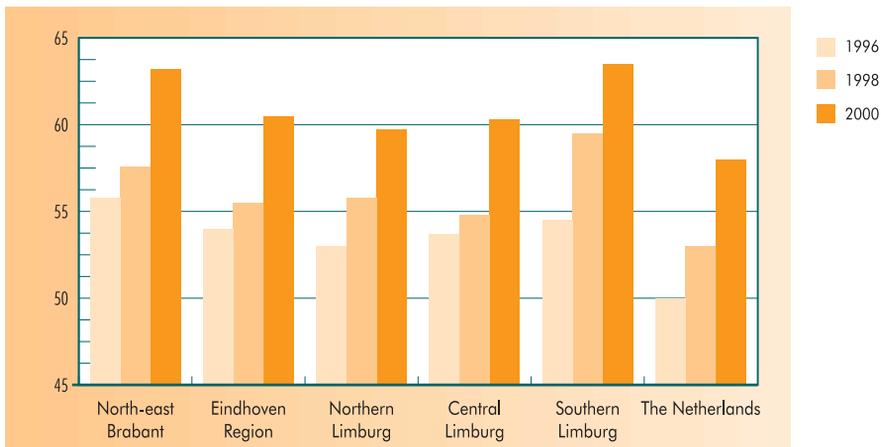
Top technology demands skills and education. The region has a highly skilled labour force. This is illustrated by the fact that the Eindhoven region exceeds the national averages for intermediate and higher vocational education and university.





## Over average labour productivity

Technology makes sense: it creates value and productivity. The employment structure and the highly skilled labour force in the South-east region result in above-average productivity, illustrate the economic strength of the region and contribute a substantial share to the economy of the Netherlands.

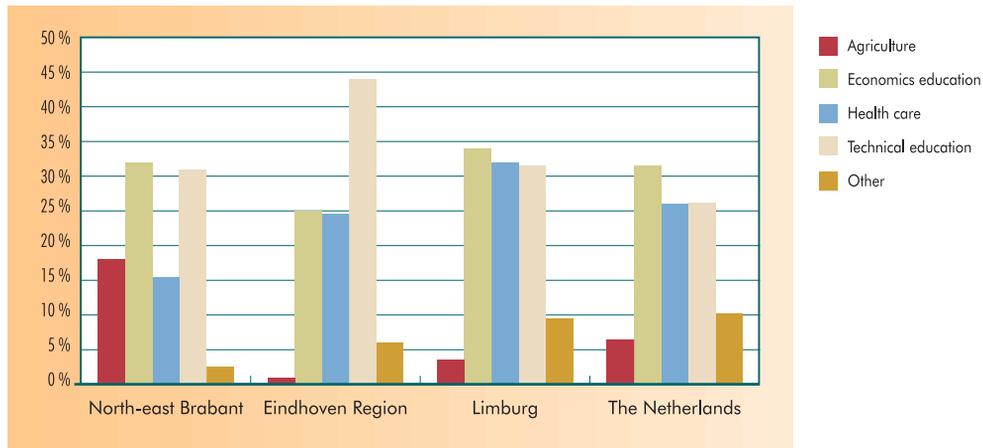


Labour productivity (in m. €) per 1000 years of labour (2001)

## Technical education: the future is now!



The South-east Netherlands invests in the future labour force stimulating the student participation in technical education. The region's future in knowledge and technology, especially in the Eindhoven region, is ensured by the high level of student participation in technical education.

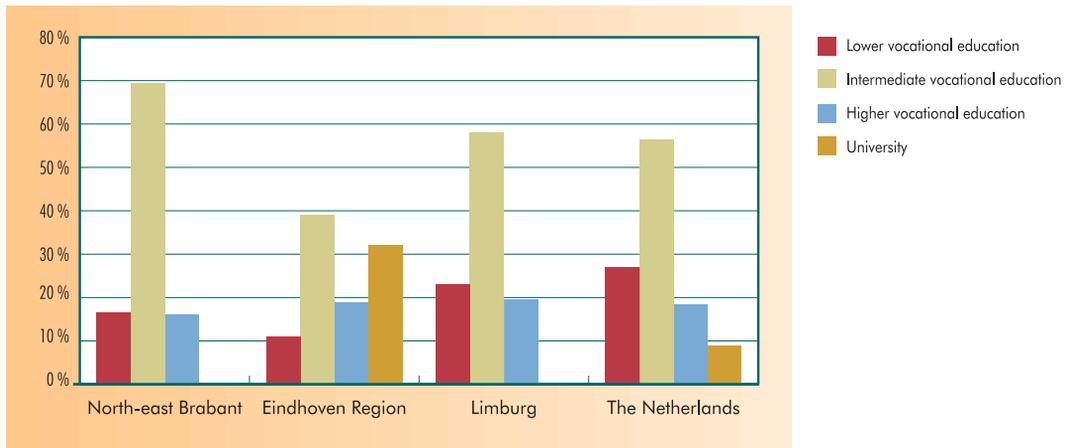


Students at vocational education and university by branch (2001/2002) in %



## Technical education: the future is now!

The distribution of students over levels of technical education differs per region; it depends on the presence of polytechnics and technology universities. The strong position of the Eindhoven University of Technology is evident.



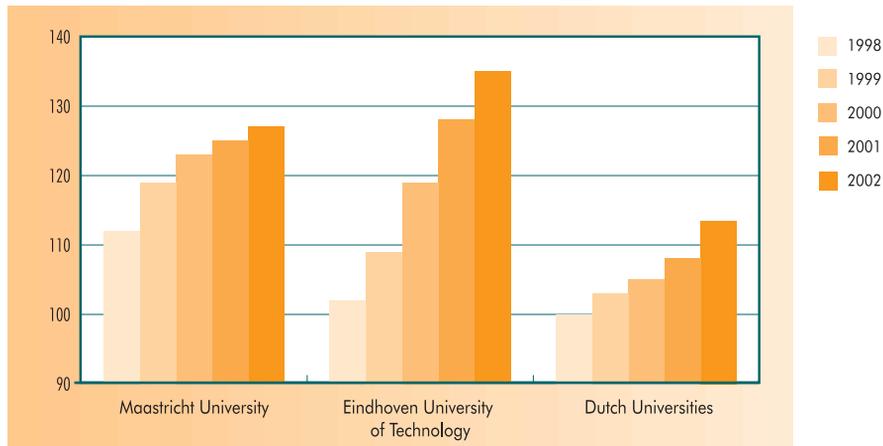
Distribution of technical students over education levels in % (2001-2002)

Source: CBS, Eindhoven University of Technology, Tilburg University, Maastricht University

## Dynamic universities



The success of the region's universities, Maastricht University and the Eindhoven University of Technology (TU/e), is evident from their growth rates. These are substantially higher than the average growth rate for all Dutch universities.



Development of the number of students at universities (index 1997 = 100)

Source: CBS, Eindhoven University of Technology, Maastricht University



# Technology



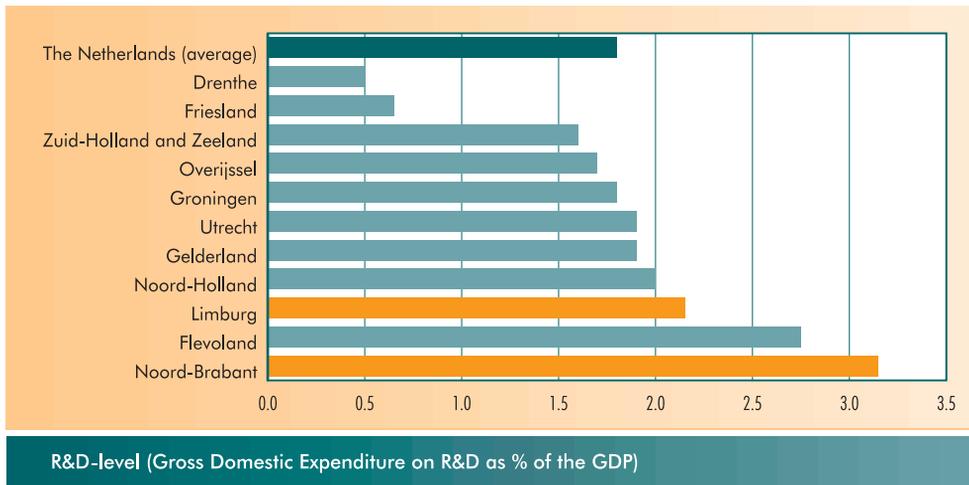
*The region is one of the 'technology and innovative hotspots' in Europe, with a substantial share of high-tech businesses and strongly developed R&D activities. To offer a productive environment for business, promising new technology areas and sectors are explored, application of knowledge is fostered and extra attention is paid to cooperation and networks between the business world, knowledge institutions and government.*

*Collaboration between and within clusters is encouraged and fostered. Innovation involves more than science and technology. It also includes improvements in marketing and services, making us 'leading in technology' as well as 'leading through technology'.*

## R&D level exceeds EU Lisbon challenge (3% GDP)



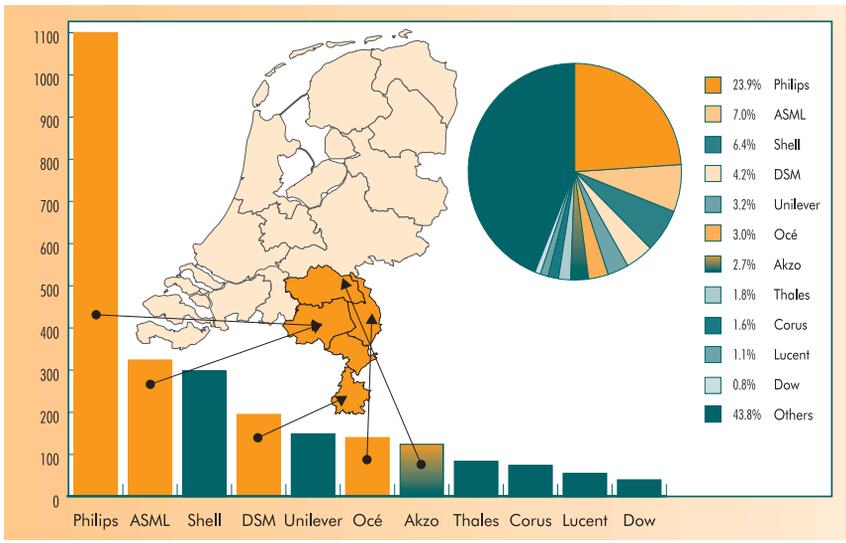
The R&D level of Noord Brabant exceeds the Lisbon challenge (R&D = 3% of the GDP). The EU Lisbon 2000 goal is to become the most competitive and dynamic knowledge based economy in the world within a decade. Noord Brabant and Limburg are the nation's top regions in the field of R&D; the provinces account for almost one-third of national expenditure on R&D (public, private and education research institutes). Rated according to the expenditure on R&D as a % of the gross domestic product (regional/national), the provinces Noord Brabant and Limburg rank no. 1 and no. 3.





## R&D: it's a matter of business(es)

R&D in the South-east Netherlands is predominantly a matter of the private sector. Approximately 45% of all business expenditure in the Netherlands is made by companies in the South-east Netherlands. Four companies (Philips, ASML, DSM and Océ) account for almost 40% of Dutch business R&D, but the share of SMEs is increasing.



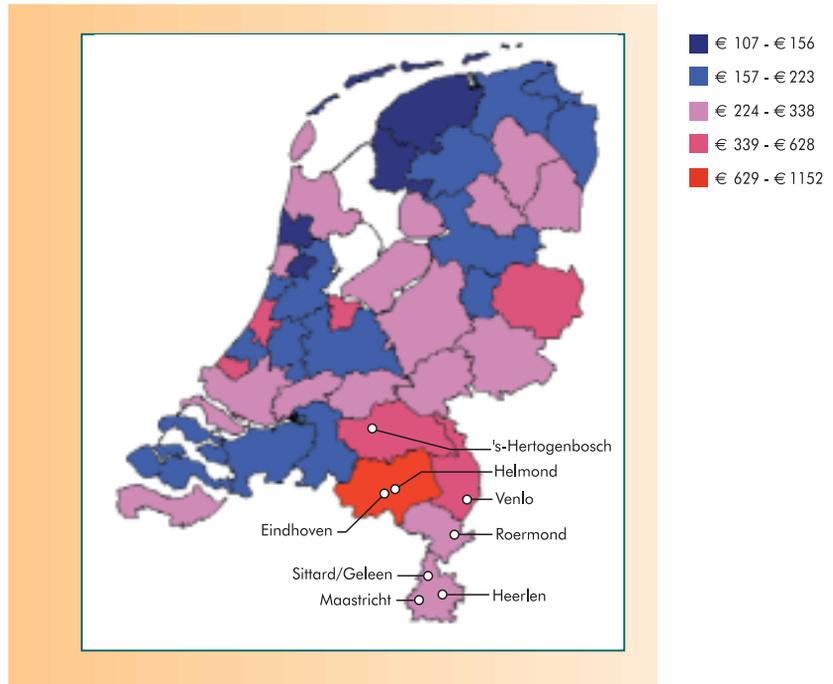
R&D business expenditures in the Netherlands (€ x1000)

## R&D: it's a matter of business(es)



The map shows that the greatest R&D intensity, indicated by labour cost per job, is in the southern part of the country.

The South-east Netherlands R&D nucleus is clearly situated in the Eindhoven region. The Dutch average R&D labour cost is € 312 per job.

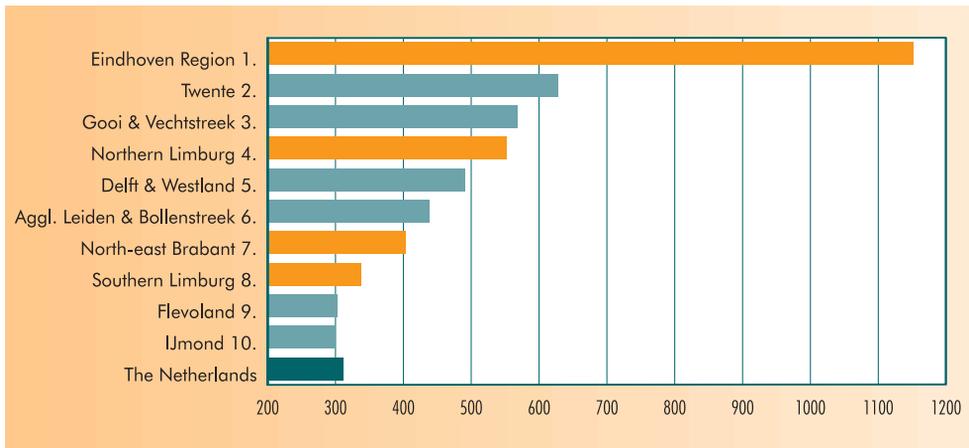


R&D-labour intensity by labour costs per job in €



## Dutch R&D intensity tripled by far!

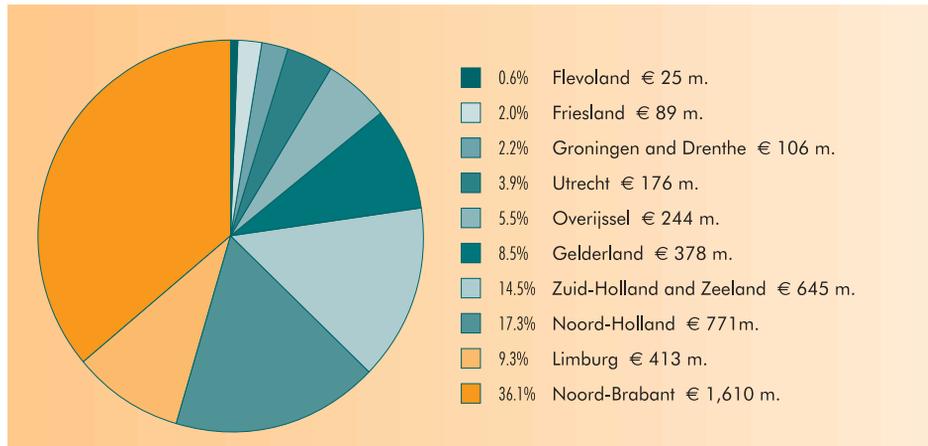
High presence South-east Netherlands regions in Dutch R&D top 10. The Eindhoven Region ranks no. 1 with a R&D level (1152). That more than triples the national index (312).



Top 10 R&D-Intensity Dutch (corop)regions (2002)

## High business R&D expenditure

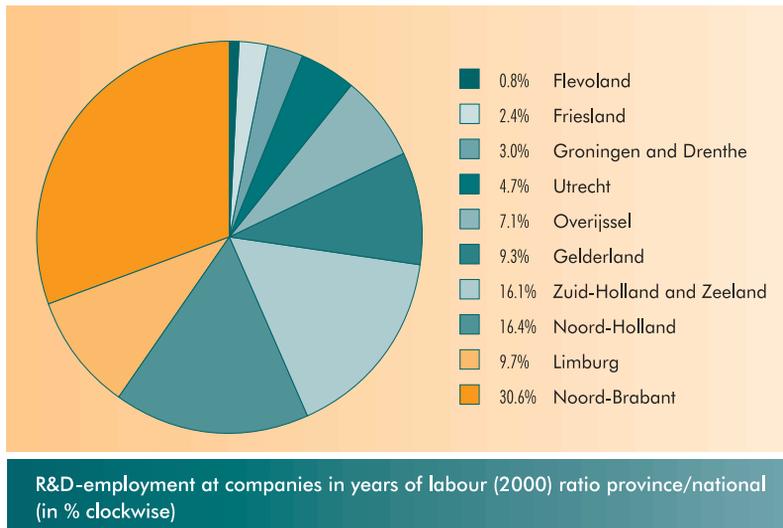
The major part of all R&D expenses in the South-east area are made by private companies; businesses in this area account for almost half of national business expenditure on R&D.



Business Enterprise expenditure on R&D (BERD) ratio provinces/national (2000) (in % clockwise)

## High R&D employment

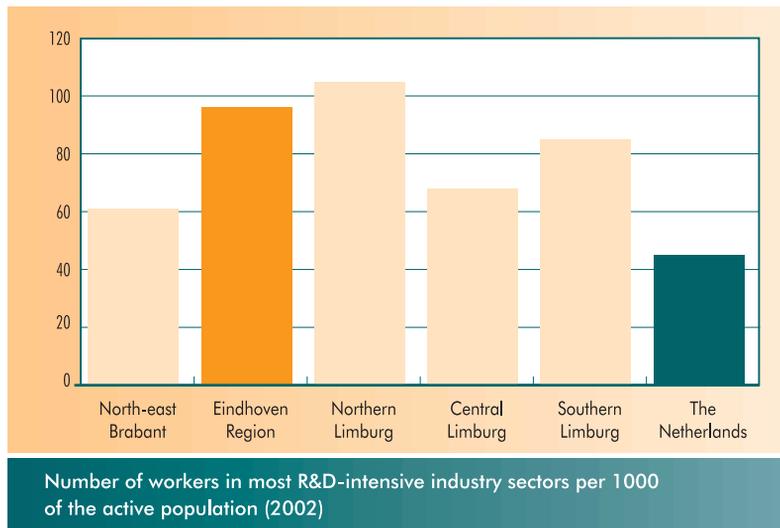
Companies in the south of the Netherlands also employ most R&D workers; Noord Brabant and Limburg together account for 40 % of R&D employment in the Netherlands.



Source: CBS, Etin Adviseurs

## Employment in R&D-intensive industries

The South-east region as a whole scores high above the national average for employment in R&D-intensive industry sectors.

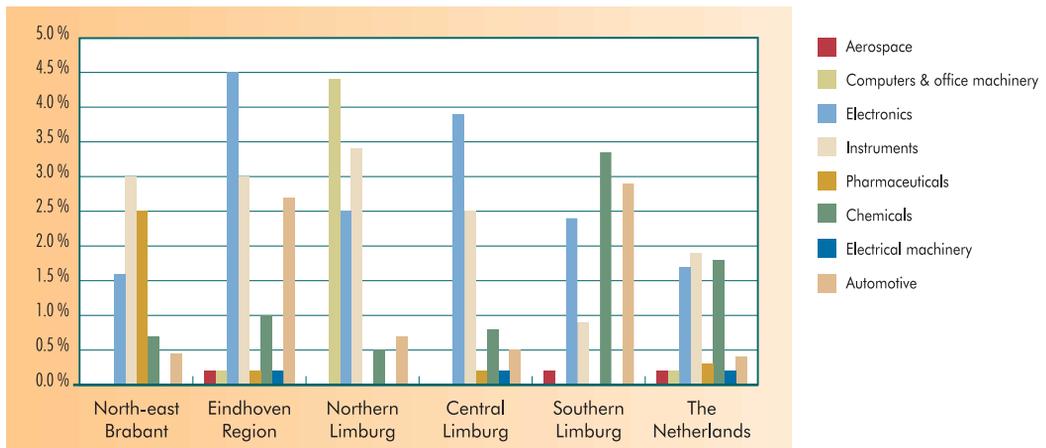


Source: LISA



## Employment in R&D-intensive industries

Every sub-region excels in a specific sector.



Workers in most R&D intensive industry sectors as a percentage of the active population (2002)

## High ranking on scientific citation scores



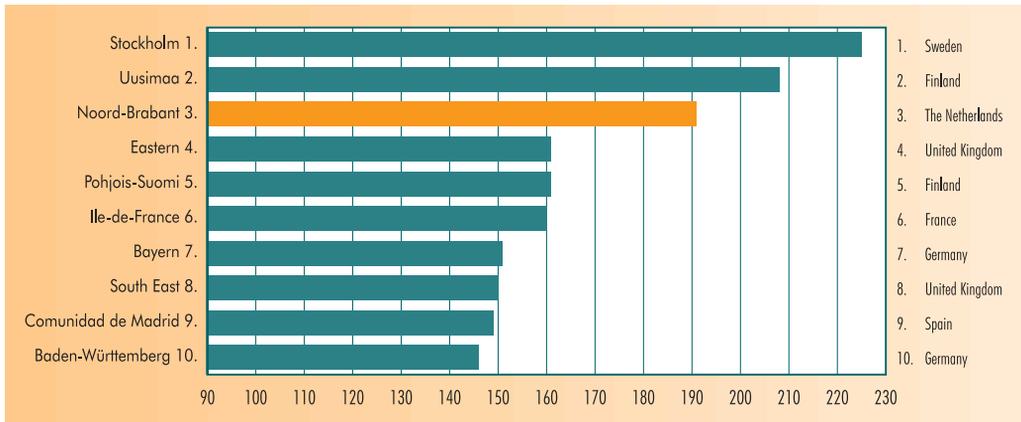
R&D Institute	Score
1. Res. C. for Energy and Env. Technology	1.99
2. Glaxo Wellcome Smithkline Beecham	1.93
3. Nat. Ins. Phyc. And High Energy Physics	1.87
4. Philips	1.84
5. France Telecom	1.56
6. Univ. Cambridge	1.55
7. Riso Natl. Lab.	1.53
8. Univ. Oxford	1.48
9. British Telecom	1.46
10. Rutherford Appleton Lab.	1.42
11. Niels Bohr Inst.	1.42
12. Tech. Univ. Munich	1.40
13. Observ. Astronomy Rome	1.40
14. Eindhoven University of Technology	1.40
15. Inst. Pasteur	1.39
16. Astra Zeneca	1.36
17. Univ. Edinburgh	1.35
18. Uppsala Astronomical Observatory	1.35
19. Research Center Julich	1.34
20. Univ. Freiburg	1.34

Science is business, business is science. On a European level, the region's research institutions (private and universities) play an important role as well, with two regional institutes appearing in the European top 20 for scientific citation scores: no.4, Philips and no.14, Eindhoven University of Technology.

## Top 3 position in European innovation

The province of Noord Brabant ranks third on the European Innovation Scoreboard. The European Innovation Scoreboard contains 17 main indicators, selected to summarize the main drivers and outputs of innovations. It's used for tracking the EU's progress towards the Lisbon goal of becoming the most competitive and dynamic knowledge based economy in the world within a decade.

And owing to its high concentration of researchers, high-tech employees, quality educators and the like, the south of the Netherlands is listed as the 1st Dutch and as the 15th European region in the World Knowledge Competitiveness Index 2003-2004. (Source: Robert Huggins Associates, 2003)



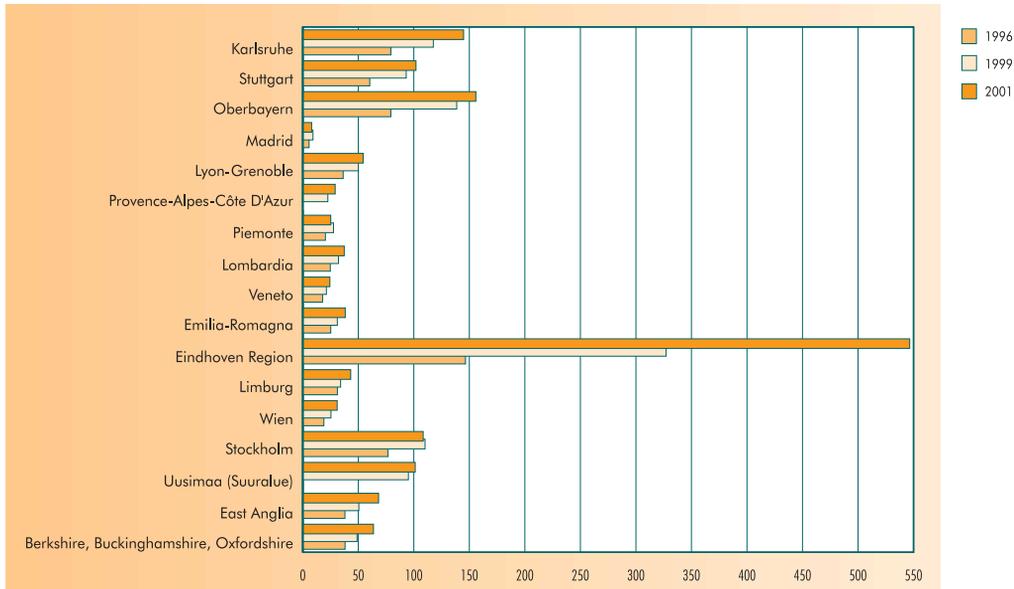
European innovation scoreboard ranking RRSII (revealed regional summary innovation index)

Source: European Innovation Scoreboard 2003, European Commission

## Result of R&D: highest European patent density



In terms of European standard measures (patents per active workers), the Eindhoven Region outranks other European regions by far.



Density EPO patents (number of EPO patents per 100,000 active workers per region)

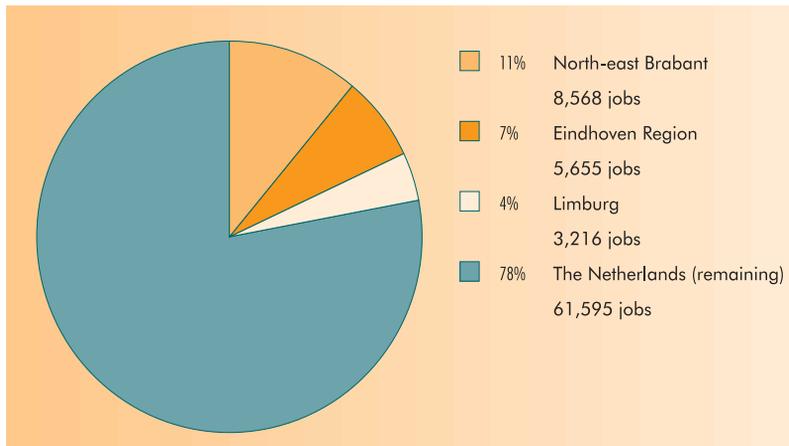
Source: CBS,  
Etin Adviseurs



## Medical technology: employment intensity

Medical technology is one of the new high-tech sectors in the South-east region; as a result of extensive cooperation several clusters have begun to form.

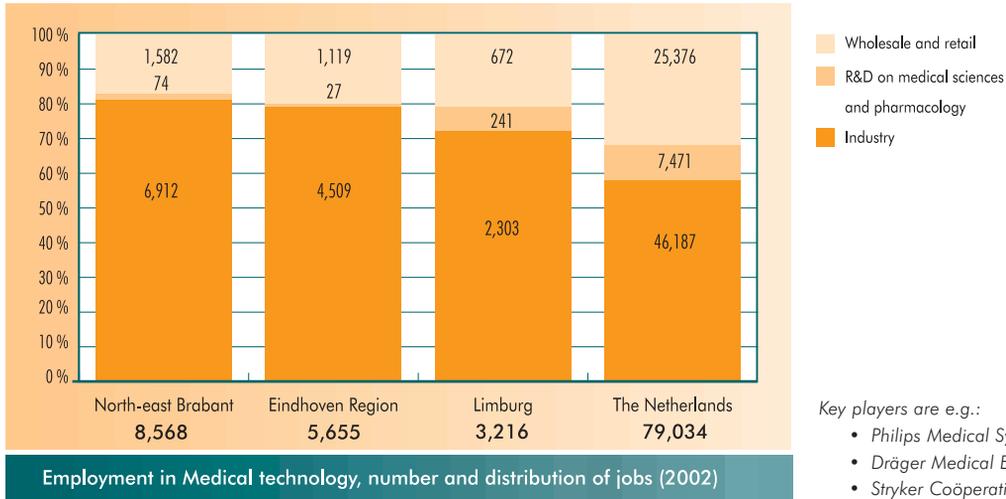
### Medical technology: employment ratio



Employment in Medical technology, number of jobs and ratio area/national (2002) (in % clockwise)

## Medical technology: employment ratio

Half of the jobs in the South-east area are concentrated in North-east Brabant; with the presence of the universities and knowledge infrastructure there is a lot of potential for growth.



Source: Trade Register, LISA, Etin Adviseurs

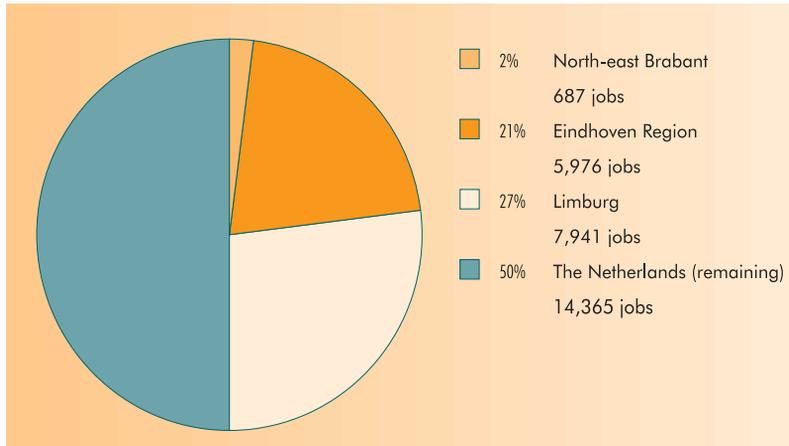
Again, industry is the engine driving the medical-technology sector in the south-east.

## Automotive: employment intensity

A substantial part of the Dutch automotive industry is concentrated in the South-east region, with hotspots in the Eindhoven region and Southern Limburg. Most of the major Dutch truck and bus manufacturers have their headquarters in the south-east.

### Automotive: employment ratio

The South-east region as a whole accounts for half of the employment in the automotive sector.



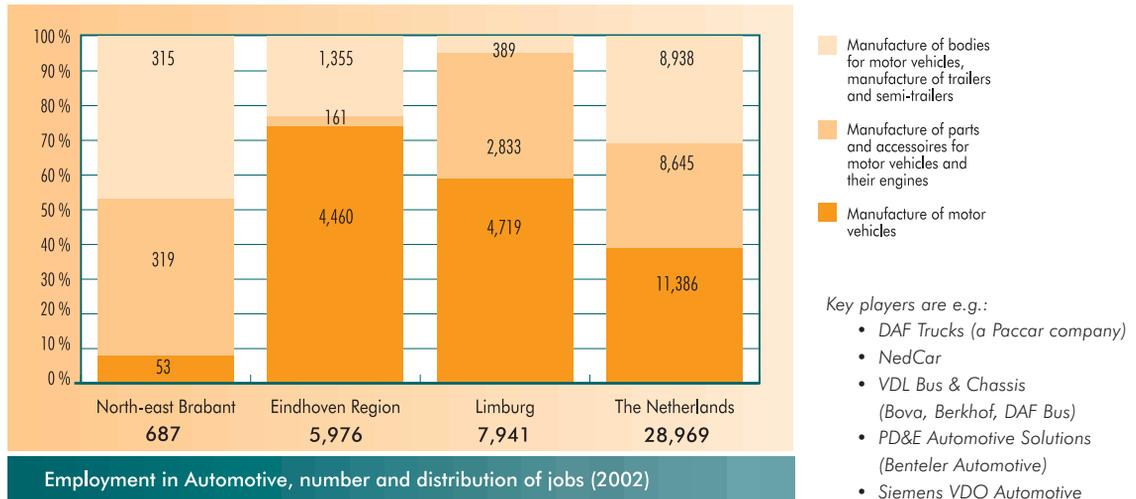
Employment in Automotive, number of jobs and ratio area/national (2002)  
(in % clockwise)

Source: Trade Register,  
LISA, Etin Adviseurs

## Automotive: employment intensity



Within the automotive sector each sub-region has its own specialisation.



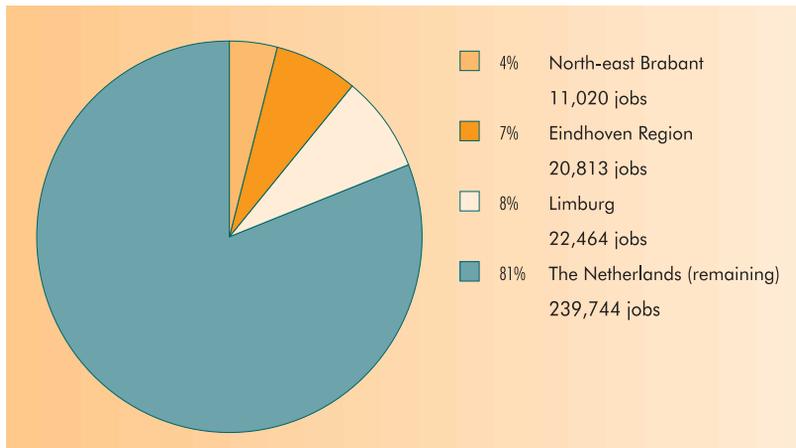
Source: Trade Register, LISA, Etin Adviseurs

## ICT: employment intensity

The South-east region, especially the Eindhoven region, is one of the world's top information and communication technology regions. In the Netherlands, the Eindhoven region ranks third in ICT activities.

### ICT: employment ratio

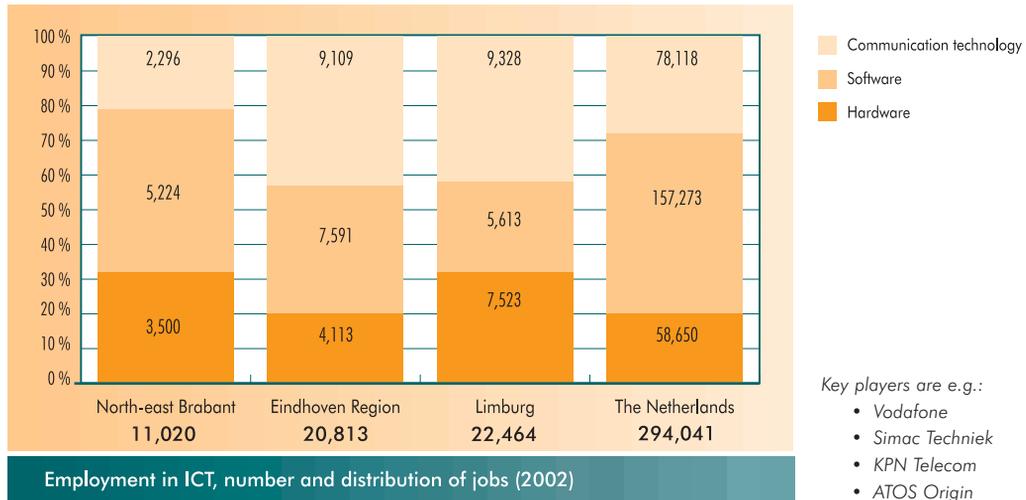
The South-east region accounts for almost 20 % of total Dutch ICT employment.



Employment in ICT, number of jobs and ratio area/national (2002) (in % clockwise)

## ICT: employment intensity

Employment in communication technology constitutes the main part of the region's ICT employment.



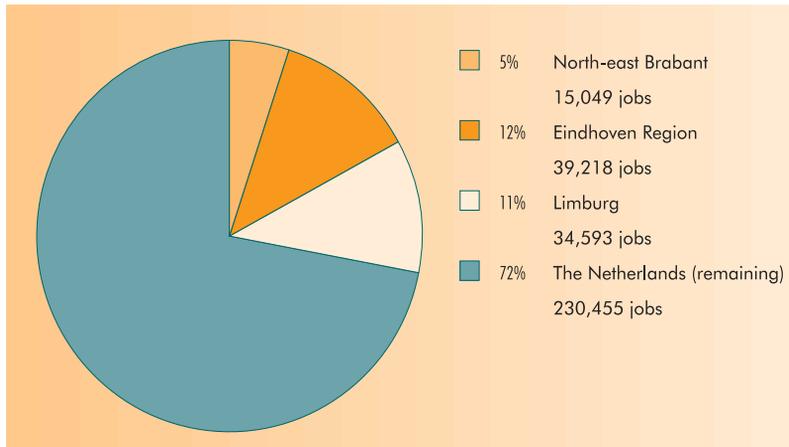
Source: Trade Register, LISA, Etin Adviseurs

## Mechatronics: employment intensity

Mechatronics, the synergy between mechanics and electronics, finds a fine breeding ground in the South-east region, especially in the Eindhoven region where the university plays an important nurturing role.

### Mechatronics: employment ratio

More than a quarter of all Dutch employees in mechatronics work in the South-east Netherlands.



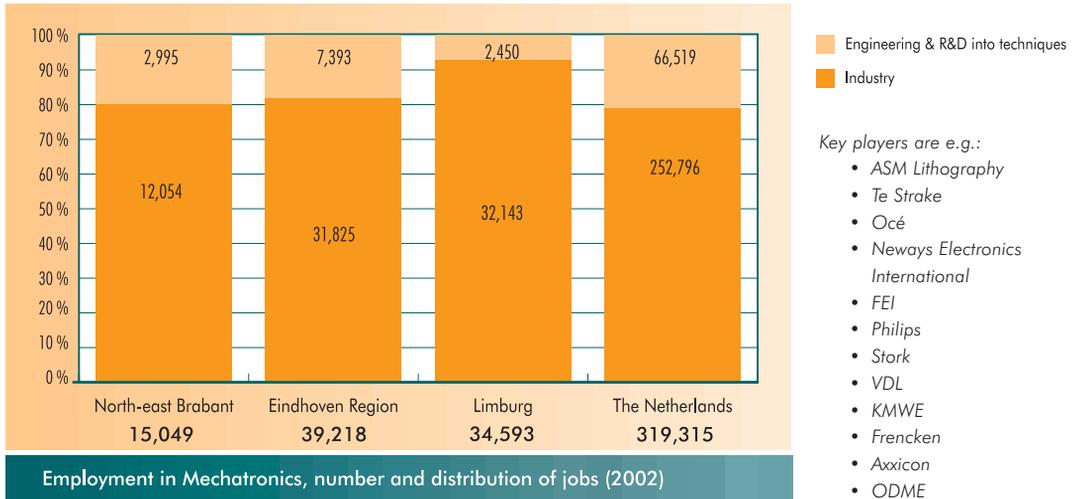
Employment in Mechatronics, number of jobs and ratio area/national (2002)  
(in % clockwise)

Source: Trade Register,  
LISA, Etin Adviseurs

## Mechatronics: employment intensity



Employment in industrial mechatronics is above average.



Source: Trade Register, LISA, Etin Adviseurs

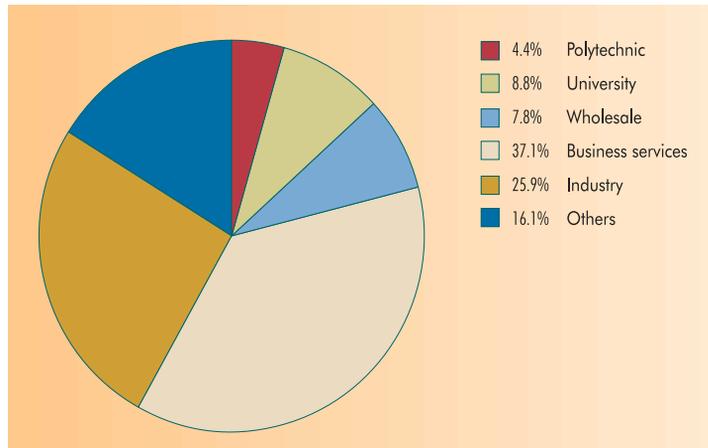
## Incubator buildings: real business greenhouses

The Eindhoven Region provides an excellent business climate for business start-ups with its incubator facilities in coaching, finance and housing. The 5 incubator centres managed by NV REDE and the Eutech Park, The Eindhoven University of Technology incubator, are intended as breeding grounds for new business activities. Over the period January 1998-December 2002 163 business start-ups were established in these incubator buildings in the Eindhoven Region.

Some facts:

- 13% of the entrepreneurs in business incubators in the region are graduates of Eindhoven University of Technology or the Fontys Polytechnic. The national average is 3%.
- 57% of the start-ups are based on ICT.
- 41% of the start-ups show a growth rate higher than 10% per year. The national average is 6%.

The new entrepreneurs have a range of backgrounds:



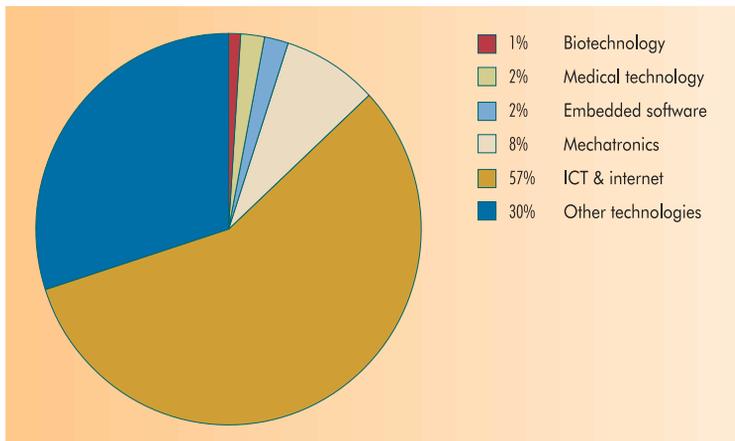
Backgrounds of start-ups in incubator buildings in the Eindhoven Region

Source: NV REDE, 2002

## Start-ups, spin-offs, spin-outs: future giants?

Over the period January 1998-December 2002 112 techno start-ups\* were established in the Eindhoven Region. 75,9% of the techno start-ups is profitable and 21,6% is R&D intensive (measured by the Dutch WBSO-tax rule).

(Source: UniPartners, 2003)

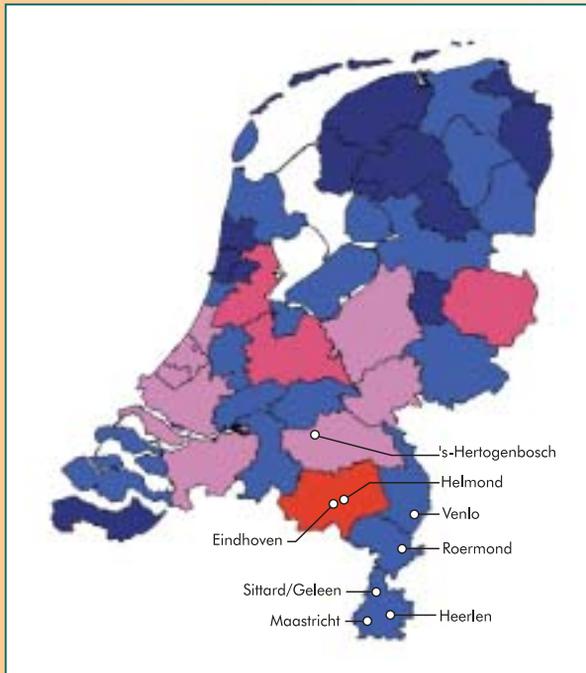


Technology profile of business start-ups in incubators in the Eindhoven Region

Source: NV REDE, 2002

\* Definition techno start-ups: Technoogy oriented, business history less than 5 years, education level entrepreneur  $\geq$  Higher vocational, minimum R&D level 10%

## Start-ups, spin-offs, spin-outs: future giants?



The Hotspots report 2002 shows the high quality of R&D in techno start-ups in the Eindhoven region.

## Design and creative industry of growing importance



The creative industry in the Eindhoven region numbers approximately 8,500 companies and institutions and employs 30,000 people. The sector accounts for 8% of total employment in the region.

The turnover generated by the creative industry is estimated at € 1,2 billion, which represents 3% of total regional turnover. At the heart of the creative industry are software development and automation, design and the creative arts. Together these areas account for more than 40% of the companies and institutions in the creative industry.

Major players in the Eindhoven region are: Philips Design, Design Academy Eindhoven, TU/e Industrial Design and TNO Institute of Industrial Technology. In addition, there are 1,200 design-related companies. The design part of the creative cluster can only be seen in the redirection of the manufacturing industry towards a design industry.



## Sources

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