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MARKETING INNOVATIONS OF POLISH SMALL AND MEDIUM ENTERPRISES

Abstract. The problem of small and medium-sized enterprises (SMEs) innovativeness still is one of the most important areas of the economic scientific inquiry. Among the most important reasons of this it can be mentioned strong relations in economy, between innovativeness and competitiveness and SMEs dominant role. The question - how effectively stimulate and create an innovativeness of the modern enterprises is still current. The main aim of this article is an attempt to assess the innovative activity of Polish SMEs in the area of marketing innovation. Research conducted in 2015 showed that the most common types of SMEs marketing innovations include discount systems, price correction according to demand and major changes in product or service design/concept or packaging.

Keywords: innovativeness, innovation activity, marketing innovations, small and medium enterprises

INNOWACJE MARKETINGOWE POLSKICH MAŁYCH I ŚREDNICH PRZEDSIĘBIORSTW

Streszczenie. Zagadnienie innowacyjności małych i średnich przedsiębiorstw (MŚP) znajduje się w jednym z głównych obszarów dociekań nauk ekonomicznych. Wśród najważniejszych przyczyn tego stanu wymienia się silne powiązanie innowacyjności z konkurencyjnością gospodarki oraz dominującą rolę MŚP. Wciąż aktualnym jest również pytanie, jak skutecznie stymulować i kreować innowacyjność współczesnych przedsiębiorstw. Głównym celem artykułu jest próba oceny aktywności innowacyjnej polskich MŚP w obszarze innowacji marketingowych. Przeprowadzone w 2015 roku badania pokazały, iż

do najczęstszych rodzajów innowacji marketingowych MŚP zaliczyć należy systemy upustów, korekty cen w zależności od popytu oraz znaczące zmiany we wzornictwie/koncepcji lub opakowaniu.

Słowa kluczowe: innowacyjność, aktywność innowacyjna, innowacje marketingowe, małe i średnie przedsiębiorstwa

1. Introduction

Both innovations and small and medium enterprises (SME) play a crucial role in contemporary economy. The former are important both from the point of view of the economy as a whole, as well as individual enterprises. From the point of view of the whole economy, innovativeness is studied and evaluated in the context of economic growth. It results from the concept of economic growth based on endogenous factors, such as innovations, formulated in the early 20th century by Joseph Alois Schumpeter.¹ It is innovations that break the routines and drive the economy from its established paths, contributing to its development.² In order for that to happen, however, it is necessary to meet three basic conditions: emergence of a creative entrepreneur (main market force), introduction of innovations by the entrepreneur, and the possibility to finance innovations from external sources (loan).³ Treating innovations as a causative factor of economic development, Schumpeter pointed out that they are a new combination of production means and capital, appearing in five types of circumstances:⁴

- introducing a new product,
- introducing a new production method,
- opening a new market,
- obtaining a new source of resources or semi-finished products,
- or conducting a new organization of an industry.

It is worth emphasizing that over the years Schumpeter changed his opinions on the role played by innovations in an economy. The original idea- defined in literature as “Schumpeter’s Mark I”- pointed to the seminal role of small, creative enterprises as sources of innovation. In other words, innovations are introduced by individual entrepreneurs, who set up new companies for borrowed money. The belief was later modified, towards the model known as “Schumpeter’s Mark II”, stressing the role of big corporations. It points out that

¹ J.A. Schumpeter, *Theorie der wirtschaftlichen Entwicklung*, Leipzig. 1912.

² J.A. Schumpeter, *Teoria rozwoju gospodarczego*, Wydawnictwo Naukowe PWN, Warszawa 1960, s. 261.

³ M. Zastempowski, *Innowacyjność małych i średnich przedsiębiorstw w warunkach kryzysu*, Wydawnictwo Naukowe Uniwersytetu Mikołaja Kopernika, Toruń 2016, s. 42-43.

⁴ J.A. Schumpeter, *Socjalizm. Kapitalizm. Demokracja*, Wydawnictwo Naukowe PWN, Warszawa 1995, s. 162; J.A. Schumpeter, *Teoria ...*, op.cit., s. 104.

innovations are introduced, in a systematic manner, by big corporations as a part of organized process realized by their Research and Development and Marketing departments⁵.

It is here that another perspective appears, which is a company. On the one hand, it is indicated that if a company does not introduce innovations, it will mean its collapse in the long-term perspective.⁶ On the other hand, it investigates and describes, among others, the determinants of its functioning⁷, cooperation⁸, resources⁹, capital for innovations¹⁰, innovative potential¹¹, technology transfer¹², research and development activity¹³, strategies¹⁴ - looking for links between them and the innovative activity and competitiveness.

An important role in the economy is also played by small and medium enterprises. Despite being a subject of numerous research and publications, they still raise considerable interest. It is hard to undermine their role in contemporary economy. In most European countries SMEs are dominant business entities. In 2014 they constituted 99.8% of all non-finance companies in 28 EU member states. They employed almost 90 million people, which was 67% the total employment. They also generated 58% of the sector's added value.¹⁵ The situation in Poland is similar. According to statistical data, they constitute 99.8% of all functioning non-finance enterprises, whose number in 2013 was 1.77 million. They also generate 48.5% of the Polish Gross Domestic Product, and employ 69% of all company labor force.¹⁶ It is also noteworthy that SMEs are a certain "carrier" of entrepreneurship and innovativeness. Unfortunately, especially in the area of innovativeness, the Polish economy (meaning mostly its companies), has a long distance to catch from the European innovation leaders. The European report on innovativeness, published in 2016, places Poland on the sixth position (from the end) among 28 EU member states. We are included into the group of moderate innovators (Summary

⁵ K. Klincewicz (red.), *Zarządzanie, organizacje i organizowanie. Przegląd perspektyw teoretycznych*, Wydawnictwo Naukowe Wydziału Zarządzania Uniwersytetu Warszawskiego, Warszawa 2016, s. 473.

⁶ C. Freeman, L. Soete, *The Economics of Industrial Innovation*, The MIT Press, 1997, s. 265-285.

⁷ P. Mielcarek, *Procesy zarządzania innowacjami w przedsiębiorstwach przemysłowych*, Difin, Warszawa 2016, s. 35-46.

⁸ N. Przybylska, M. Zastempowski, *Cooperation in Creating Innovation in Polish Small and Medium-Sized Enterprises in the Light of Empirical Studies*, „Journal of Competitiveness”, 2016, no. 8(2), p. 42–58.

⁹ M. Zastempowski, op.cit., s. 90-97, 131-148.

¹⁰ T. Kijek, *Intellectual property rights and appropriability of innovation capital: evidence from Polish manufacturing firms*, „Equilibrium”, 2016, no. 11(2), 387–399.

¹¹ M. Zastempowski, *Uwarunkowania budowy potencjału innowacyjnego polskich małych i średnich przedsiębiorstw*, Wydawnictwo Naukowe Uniwersytetu Mikołaja Kopernika, Toruń 2010; A. Adamik, *Innowacyjność a proces rozwoju więzi partnerskich przedsiębiorstw*, „Zeszyty Naukowe Uniwersytetu Szczecińskiego”, nr 891, Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin 2015, s. 43-63.

¹² W. Głabiszewski, *Potencjał absorpcyjny przedsiębiorstw finansowych w Polsce w procesie transferu innowacyjnych technologii*, Wydawnictwo Naukowe Uniwersytetu Mikołaja Kopernika, Toruń 2016, s. 57-64.

¹³ N. Bočková, *Research, development and innovations in Czech manufacture of electronic products*, „Equilibrium”, 2015, no. 10(4), 163–180.

¹⁴ K. Krukowski, *Cele strategiczne innowacyjnych małych i średnich przedsiębiorstw*, „Studia Ekonomiczne. Zeszyty Naukowe Uniwersytetu Ekonomicznego w Katowicach”, 2016, nr 267, s. 96-106.

¹⁵ K. Hope, *Annual Report on European SMEs 2014/2015. SMEs start hiring again*, European Commission, 2015, p. 3-5.

¹⁶ A. Tarnawa, P. Zadura-Lichota (red.), *Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce w latach 2013–2014*, Polska Agencja Rozwoju Przedsiębiorczości, Warszawa 2015, s. 13-18.

Innovation Index (SII) = 0.29175). The European innovation leaders are Sweden, Denmark, Finland, Germany and Holland.¹⁷

Contemporary approach to innovations differs from the classical, Schumpeter's vision. The most popular typology of innovation is presented by *Oslo Manual*, prepared by OECD and Eurostat. It is a methodological manual for all institutions involved in quantitative studies on innovation. According to the third, up-to-date edition, innovation is understood very broadly. It means introduction of a novel, or significantly improved product (item or service) or service, new marketing method, or a new organizational method in business practice, workplace organization or relations with the environment.¹⁸ The approach differs from the earlier, second edition from 1996, as it widens the scope of perceiving innovation by marketing and organizational innovations, which in turn seems to result from their growing role in contemporary, globalized world.

Taking the abovementioned factors into account, as well as noting the words by Peter Drucker, according to whom "a business enterprise has two primary functions: marketing and innovative one"¹⁹, a question has been asked on the extent and type of marketing innovations introduced by Polish small and medium enterprises. An attempt to answer it is the primary goal of this elaboration.

2. Marketing innovation – theoretical frame

The manner of understanding and defining innovations has been significantly modified. There has been as certain transition from the narrow perception of innovation (innovation as the first commercial introduction (use) of a new product, process, system or device), represented, among others, by E. Mansfield²⁰, Ch. Freeman²¹ and L. Soete²², towards its broader perception (as any foods, service or idea anyone perceives as novel), characteristic for, among others, by Ph. Kotler²³, P.F. Drucker²⁴, or M.E. Porter.²⁵ It is also worth emphasizing that in the broad- contemporary- perception of innovation, increasing role is played by the ones from the sphere of marketing.

¹⁷ H. Hollanders, N. Es-Sadki, M. Kanerva, *Innovation Union Scoreboard 2016*, European Union 2016, p. 6, 12, 14, 67.

¹⁸ *Podręcznik Oslo. Zasady gromadzenia i interpretacji danych dotyczących innowacji*, OECD i Eurostat, 2005, s. 48.

¹⁹ P.F. Drucker, *Innowacje i przedsiębiorczość. Praktyka i zasady*, Polskie Wydawnictwo Ekonomiczne, Warszawa 1992, s. 79.

²⁰ E. Mansfield, *Industrial Research and Technological Innovation: An Econometric Analysis*, W.W. Norton & Company, New York 1968, p. 83.

²¹ C. Freeman, *The Economics of Industrial Innovation*, MIT Press, Cambridge 1982, p. 7.

²² C. Freeman, L. Soete, op.cit., p. 1.

²³ P. Kotler, *Marketing Management*, Prentice Hall, New Jersey 1991, p. 342.

²⁴ P.F. Drucker, op.cit., s. 42.

²⁵ M.E. Porter, *The Competitive Advantage of Nations*, The Macmillan Press, London 1990, p. 45.

Trying to provide a better description of marketing innovations, it is worth using an up-to-date version of *Oslo manual*.²⁶ According to it, marketing innovation is “introducing a new marketing method involving major changes in the product’s project/structure, or in its packaging, distribution, promotion or pricing strategy”. Their aim should be better satisfaction of customers’ identified needs, opening new markets, or new product positioning on the market in order to increase sales.²⁷

It is worth noting that it does not include any kind of change in a company’s marketing tools, but only those that mean implementation of a new, previously unused marketing technique.

Analyzing the above definition, four types of marketing innovations are observed. The first involves significant changes in *product’s project/structure*, which constitute an element of a company’s marketing concept. The changes concern the type of modifications in products’ form and look which do not lead to changing their features in utilitarian and functional terms. Another aspect included here are changes in *packaging* of grocery products, beverages or cleaning products- which are goods whose outlook is mostly defined by packaging.²⁸

The second type are marketing new methods in the field of *product distribution*. They involve a company’s introduction of new sales channels. It should be emphasized at this point that a sales channel is understood as the methods used in order to sell goods and services to customers, not logistic methods, such as transport, storage and trans-shipment. Among the innovations of this type one can enumerate, for instance, introducing the franchise system for the first time, cold sale, exclusive dealing, product licensing, or a new concept of product exposition.²⁹

The third type includes new marketing methods in terms of *product promotion*, which means the methods involving the use of new concepts of promoting a company’s goods and services. Among the innovations of this type, one could point to, for example, product placement in movies or television, product endorsement, introducing a completely new brand symbol for positioning a product on a new market, or a complete change of a product’s image.³⁰

The last type of marketing innovations- in the area of price shaping- concerns using new pricing strategies in selling a company’s products on the market. Among the possible forms of this type of innovations, one could mention, for instance, the first use of a new method of product price correction, depending on demand fluctuations. One should emphasize, however, that the methods of shaping the price whose only aim is differentiation for particular buyers’ categories is not considered as innovations.³¹

²⁶ *Podręcznik Oslo...*, op.cit., s. 52-53.

²⁷ *Ibidem*, s. 52.

²⁸ *Ibidem*.

²⁹ *Ibidem*, s. 53.

³⁰ *Ibidem*.

³¹ *Ibidem*.

While presenting the concept of marketing innovations according to Oslo Manual, one should also emphasize that the changes in marketing tools which are seasonal, regular or other- routine- in their nature are not considered as innovations. In order for them to be treated as such, the condition of them not being previously used by the company should be met.³²

3. Characteristics of the surveyed enterprises

Empirical studies, the fragment of which is discussed here, were conducted in 2015, as a part of a research project by the National Science Center entitled “Innovativeness of small and medium enterprises in the period of economic crisis- determinants, trends and models”.³³

The main part of research was conducted using the CAPI method, in cooperation with PBS limited in Sopot, on a representative sample of Polish small and medium enterprises. A random selection of the sample was conducted in September 2014 by Statistical Informatics Center of the Central Statistical Office in Warsaw. The draw was conducted from the REGON registry as of 31.08.2014. The representativeness was based on the following criteria: company size, type of business activity according to Polish Activity Classification sections, company headquarters (according to regional cross-section) and the minimum- 5-year- period of market activity. The size of research sample was defined assuming that:

- in 2012 the number of small enterprises (without micro ones) and the medium ones was 146489 and 29787, respectively. The total population was thus 176276 entities³⁴;
- trust level $p = 0.95$
- action size - the percentage of innovation in the population is 20%³⁵,
- the maximum error is 0.05.

Assuming such criteria, the minimum size sample should be 246 entities. Finally, the research involved 250 companies, whose characteristics were presented in a table 1.

Table 1

Characteristics of the surveyed SMEs

Criterion	Number N=250	Share %
Size of the enterprise:		
small (10 – 49 employees)	204	81,6
medium (50-249 employees)	46	18,4
Sections according to the Polish Activities Classification		
C – manufacturing	55	22,0

³² Ibidem.

³³ The project was financed by the National Science Centre - No DEC-2013/09 /B/HS4/01971.

³⁴ A. Tarnawa, P. Zadura-Lichota, *Raport o stanie sektora małych i średnich przedsiębiorstw w Polsce w latach 2011-2012*, Polska Agencja Rozwoju Przedsiębiorczości, Warszawa 2013, s. 10-11, 170.

³⁵ A. Wilmańska, P. Zadura-Lichota, *Innowacyjność 2010*, Polska Agencja Rozwoju Przedsiębiorczości, Warszawa 2010, s. 10-11.

D – electricity, gas, steam, hot water and air conditioning	1	0,4
E – water supply; sewage and waste management and remediation activities	2	0,8
F – building construction	43	17,2
G – wholesale and retail trade; repair of motor vehicles, excluding motorcycles	68	27,2
H – transport and storage	7	2,8
I – activities related to accommodation and catering services	20	8,0
J – information and communication	6	24,0
K – financial and insurance business	5	2,0
L - activities related to the real estate	11	4,4
M – professional, scientific and technical activity	17	6,8
N – administration and support activities	7	2,8
Q – health care and social welfare	1	0,4
R – activities related to culture, entertainment and recreation	2	0,8
S – Other service activities	5	2,0
Enterprise location – voivodship:		
Dolnośląskie	17	6,8
Kujawsko-pomorskie	11	4,4
Lubelskie	11	4,4
Lubuskie	7	2,8
Łódzkie	12	4,8
Małopolskie	23	9,2
Mazowieckie	43	17,2
Opolskie	6	2,4
Podkarpackie	10	4,0
Podlaskie	9	3,6
Pomorskie	14	5,6
Śląskie	28	11,2
Świętokrzyskie	6	2,4
Warmińsko-mazurskie	11	4,4
Wielkopolskie	30	12,0
Zachodniopomorskie	12	4,8
Running innovative activities:		
Yes	208	83,2
No	42	16,8

Source: Own elaboration.

4. The assessment of Polish small and medium enterprises marketing innovativeness

The evaluation of introduced marketing innovations in Polish small and medium enterprises was based on guidelines from Oslo Manual. It was supplemented by possible examples of marketing innovations, in order to present the topic better to potential respondents.

In order to conduct their in-depth analysis and evaluation, the following categories of marketing innovations have been distinguished:

1. major changes in product or service design/concept or packaging;
2. new methods in terms of product distribution or sales channels:
 - franchise system,

- product licensing,
 - cold sale,
 - exclusive dealing,
 - online sale,
 - new concepts of products exposition,
 - positioning a product in a new market segment,
 - positioning a product in a new market (geographically);
3. new media or techniques of product promotion:
- new media of advertising,
 - new image,
 - new product brands,
 - loyalty programs (for example loyalty cards),
 - public relations - taking care of a company's positive image;
4. new methods of shaping the prices:
- the method of price correction according to demand,
 - discount system.

In the course of analyzing the obtained results, data from 208 small and medium enterprises was analyzed. They were entities which declared that during the past 3 years they had been involved in innovative activities. The studied enterprises were asked whether they had introduced marketing innovations. The obtained results were presented in a table 2, according to company size.

Table 2

Marketing innovations of Polish SMEs

Type of marketing innovation	Enterprises					
	Small <i>N=164</i>		Medium <i>N=44</i>		Together <i>N=208</i>	
	Share of responses (%)					
	Yes	No	Yes	No	Yes	No
1. Major changes in product or service design/concept or packaging	36,0	64,0	40,9	59,1	37,0	63,0
2. New methods in terms of product distribution or sales channels						
• franchise system,	15,9	84,1	18,2	81,8	16,3	83,7
• product licensing,	11,6	88,4	18,2	81,8	13,0	87,0
• cold sale,	34,8	65,2	34,1	65,9	34,6	65,4
• exclusive dealing,	24,4	75,6	25,0	75,0	24,5	75,5
• online sale,	20,1	79,9	13,6	86,4	18,8	81,2
• new concepts of products exposition,	25,6	74,4	22,7	77,3	25,0	75,0
• positioning a product in a new market segment,	29,9	70,1	47,7	52,3	33,7	66,3
• positioning a product in a new market (geographically);	12,8	87,2	25,0	75,0	15,4	84,6
3. New media or techniques of product promotion						
• new media of advertising,	34,8	65,2	38,6	61,4	35,6	64,4
• new image,	36,0	64,0	29,5	70,5	34,6	65,4
• new product brands,	27,4	72,6	25,0	75,0	26,9	73,1
• loyalty programs (for example loyalty cards),	24,4	75,6	31,8	68,2	26,0	74,0
• public relations - taking care of a company's positive image;	33,5	66,5	47,7	52,3	36,5	63,5

4. New methods of shaping the prices:						
• the method of price correction according to demand,	43,9	56,1	45,5	54,5	44,2	55,8
• discount system.	51,2	48,8	43,2	56,8	49,5	50,5

Source: Own elaboration.

While evaluating all the findings obtained for innovative SMEs, it turns out that the largest number of respondents introduced marketing innovations involving new methods of price shaping. It included the discount system and price correction according to demand. Introducing that type of innovations was reported by 49.5% and 44.2% of innovatively active SMEs, respectively. The third most commonly introduced marketing innovation are significant changes in design/concept or packaging (37%). About a third of respondents reported to have introduced five following types of innovations: public relations, new advertising medium, cold sale, new image, and positioning a product in a new market sector. Roughly a fourth of studied SMEs declared introduction of new loyalty programs, new concept of product exposition, exclusive dealing and online sale. 15% used franchising and started positioning their product on a geographically new market. The lowest number of respondents- about 13%- used product licensing. Detailed results are presented on a figure 1.

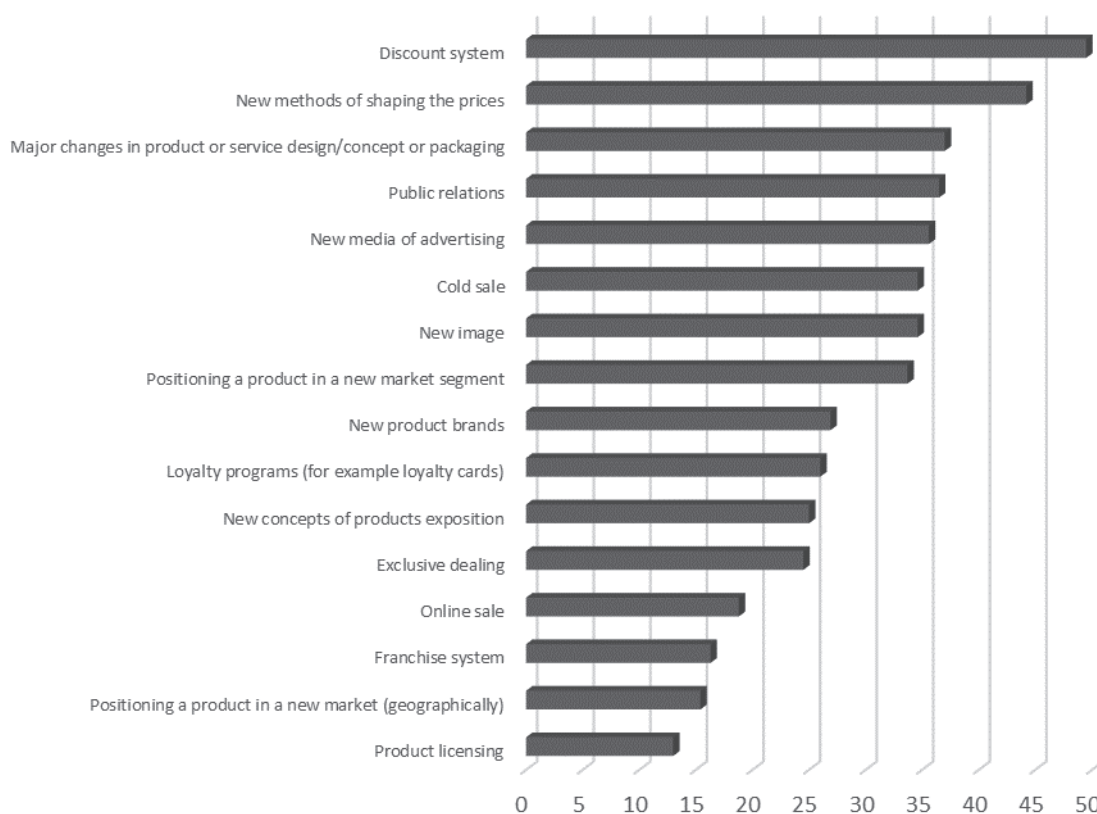


Fig. 1. Marketing innovation of Polish innovatively active SMEs

Source: Own elaboration.

The obtained results also allow for evaluating them from the perspective of company size. In the group of small, innovatively active enterprises, the largest number introduced discount systems (over 50% of respondents) and price correction according to demand (43.9%). About

35% of the studied entities introduced a new image, changes in product design/concept or packaging, cold sale, new advertising medium and public relations. A third of the respondents started positioning their product in a new market sector and introduced new product brands. About 25% of the respondents used a new concept of product exposition, exclusive dealing and loyalty programs. A slightly lower number decided to introduce online sale (20.1%). About 15% of small enterprises created a franchising system and started positioning their product on a geographically new market. The lowest number of respondent- 10%- started licensing their products. Detailed results are presented on a figure 2.



Fig. 2. Marketing innovation of Polish innovatively active small enterprises
Source: own elaboration.

Among medium, innovatively active enterprises, the highest number- almost 47.7%- pointed to positioning their product in a new market segment or activity in the public relations area. A slightly lower number introduced a system of price correction according to demand (45.5%). About 40% of the respondents used a discount system, major changes in product design/concept or packaging, or a new advertising medium. 35% started cold sale. A third of the entities studied introduced loyalty programs and a new image, whereas one-fourth started positioning their product on a geographically new market, exclusive dealing, or introduced new product brands. Over 20% used new concepts of product exposition. 18%, on the other hand, introduced product licensing and franchise system. The lowest number of respondents- 13.6%- started online sale. Detailed results are presented on a figure 3.

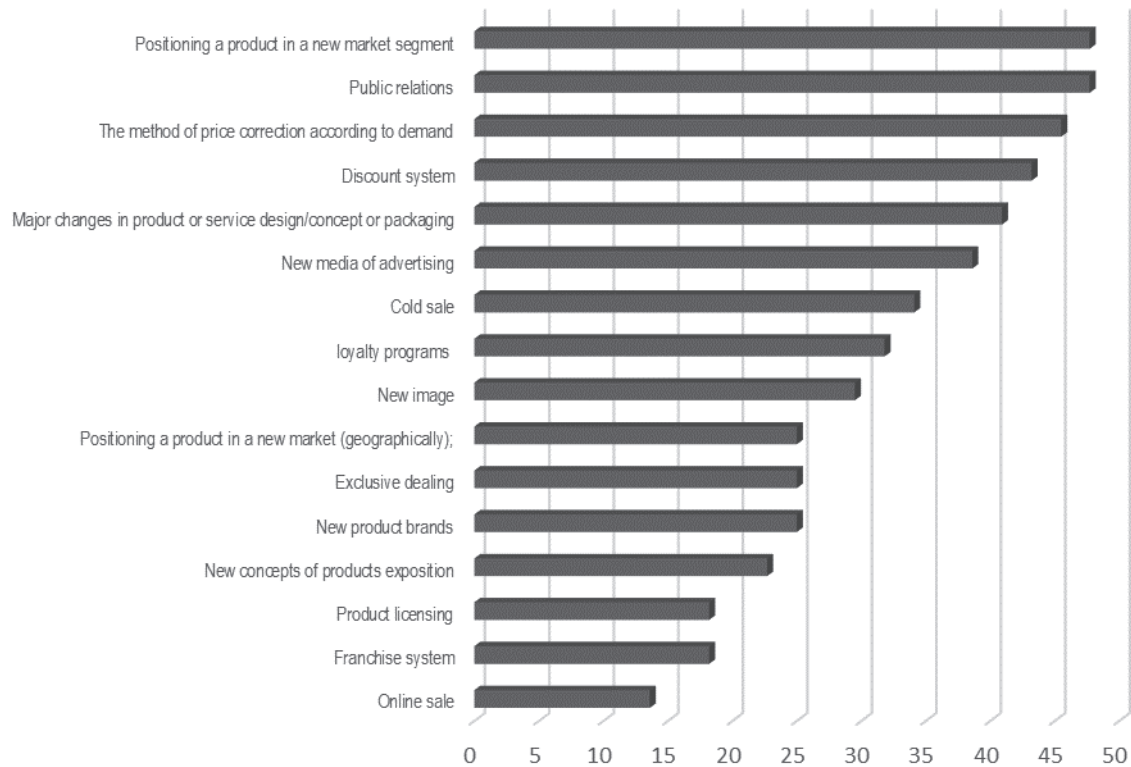


Fig. 3. Marketing innovation of Polish innovatively active medium enterprises
Source: Own elaboration.

5. Conclusion

The aforementioned results on the marketing innovativeness of Polish SMEs allow to formulate a number of conclusions.

Firstly, they indicate that SMEs mainly introduce marketing innovations in the area of new methods of shaping prices. Among them, price correction according to demand and a discount system should be mentioned as the most common. Introducing that type of innovations was declared by 49.5% and 44.2% of innovatively active SMEs. The third most commonly introduced marketing innovation are significant changes in product design/concept or packaging (37%).

Secondly, the three least commonly used marketing innovations are: creating a franchise system, positioning a product on a geographically new market and product licensing.

Thirdly, differences were observed in terms of innovations introduced depending on company size. Medium enterprises much more frequently positioned their products in new market segments and geographically new markets, as well as used public relations tools. The results seem to confirm that viewing small and medium enterprises from a joint perspective is

erroneous. The enterprises differ significantly from each other, which can be clearly seen in terms of their activity in the field of marketing innovations.

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