

EUROPEAN  
COMMUNITY  
BUSINESS &  
INNOVATION  
CENTRE



# EUROPEAN BUSINESS AND INNOVATION CENTRE NETWORK [EBN]

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THE BIC NETWORK IN 2011  
FACTS AND FIGURES  
JUNE 2012



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# INTRODUCTION

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Since 2004 EBN's full members, the EC-BICs (accredited Business and Innovation Centers), provide a full range of data with the initial purpose of ensuring that the EC-BIC trademark remains associated to innovation-based incubators with always increasing quality standards. This enabled EBN to acquire a wide set of data which, every year, is re-shaped in the form of the BIC Observatory. This year makes no exception!

Also this year the data was collected using the standard procedures through the EBN on-line self-assessment questionnaire. In 2011 there were 144 BICs in Europe and beyond, 130 of these provided answers that were checked and hence validated by the EBN quality team in the first quarter of 2012. These represent a little over 90% of the BIC universe, rendering the data statistically very relevant and making it possible to provide a real picture of what has happened last year within the BIC community.

What will be shown in this report therefore is the result of the hard work done daily by the BICs' staff and experts in supporting new innovative start-ups and in introducing innovation within selected existing firms in the territories they serve.

Let's take a quick bird's eye view of the data. Last year the EBN network has produced more than 5500 start-ups, a little bit of a slowdown respect to the data we had on 2010, but this is balanced by a raise in the total numbers of jobs



produced which is a figure close to 20.000, and again we can see that the cost for creating this jobs has significantly decreased (as well as the public sector contribution for each job created)! A sign of increased efficiency!

To have more insights, you will have to go forward in reading the entire report, but before going into details about numbers and stats, we would like to take the opportunity to thank all the BICs. Women and men, who have been able to take some time off from their busy schedules to provide the data that makes EBN the unique holder of a powerful database with information on the European innovation-based industry. An asset, we believe not many can count on, and that is put to the service of EBN's members in the form of extensive reporting and always-more sophisticated benchmarking tools.

## Statistical characteristics of the survey

Total number  
of potential  
participants:

144

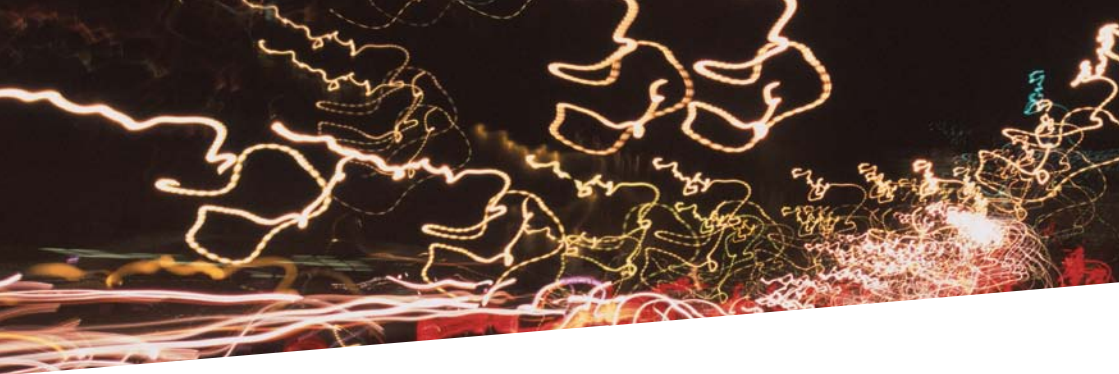
Percentage of  
BICs participating  
in the Survey:

90%

*Method: on-line self-evaluation questionnaire plus subsequent validation*

*by the EBN Quality Team*

*Source: EBN Quality System <http://quality.ebn.be>*



# KEY PERFORMANCE INDICATORS AND VALUE FOR MONEY

## ENTREPRENEURS AND EXISTING SMES

Compared with the data from 2010, four elements are strikingly apparent in 2011:

The number of enquiries (contacts for enterprise creation) has increased dramatically (variation +40%).

As a consequence more business plans were produced in 2011 (variation +17,61%).

The increased number of people passing through the pre-incubation stage did not lead to an increase in the number of start-ups. Indeed the average number of start-ups per BIC evolved from the 2010 figure of 49,67 to 42,43 (variation -15,14%).

The average number of jobs created in start-ups per BIC, albeit the figures above, has not changed significantly from 98,96 in 2010 to 95,85 in 2011 (variation -3,1%).

|         | Enquiries |        | Feasibility studies |        | Enterprise creation projects |       | Business plans |       | Start-ups |       | Jobs created in Start-ups |       |
|---------|-----------|--------|---------------------|--------|------------------------------|-------|----------------|-------|-----------|-------|---------------------------|-------|
|         | 2010      | 2011   | 2010                | 2011   | 2010                         | 2011  | 2010           | 2011  | 2010      | 2011  | 2010                      | 2011  |
| Total   | 69307     | 97426  | 12461               | 13572  | 7125                         | 7516  | 6989           | 8409  | 6358      | 5516  | 12668                     | 12460 |
| Average | 541,46    | 749,43 | 97,35               | 104,40 | 55,66                        | 57,82 | 54,60          | 64,68 | 49,67     | 42,43 | 98,96                     | 95,85 |
| Median  | 79,50     | 98,50  | 33,50               | 41,50  | 18,00                        | 23,50 | 18,50          | 24,50 | 14,00     | 13,00 | 31,50                     | 25,00 |

Table 1: new entrepreneurs - from enquiries to job creation

As more people are contacting the BICs to get a first advice on enterprise creation, the incubation process through the BIC model seems to have become more selective in the initial stages. This is also, most probably, one of the key elements of success of the BICs which still report a very high survival rate of the supported companies. This increased selectivity is correlated with the higher focus made by BICs on innovation-based applications and entrepreneurs.

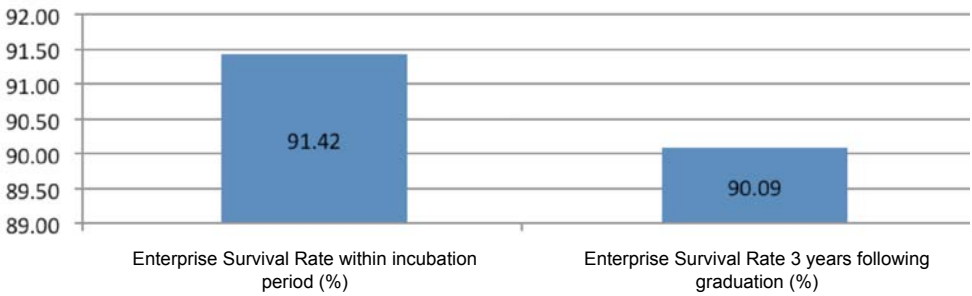


Figure 1: enterprise survival rate in 2011

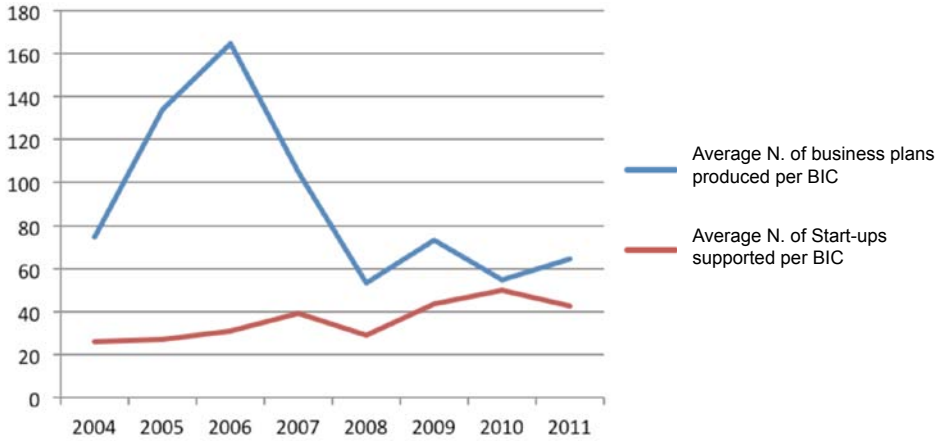


Figure 2: some trends 2004 - 2008

Of course the BIC trademark is provided also to organizations who not only support the creation of innovative start-ups, but who, among other things, promote the introduction of modernization processes and of innovation in existing SMEs. In 2010, the BIC network has indeed shown increased values of the KPIs in this market segment. Over 14000 SMEs have received support in 2011 (variation +31,5%) and over 7000 jobs have been created in existing SMEs (variation +16%).

|         | Existing SMEs supported |        | Jobs created in SMEs |       |
|---------|-------------------------|--------|----------------------|-------|
|         | 2010                    | 2011   | 2010                 | 2011  |
| Total   | 11000                   | 14472  | 6144                 | 7389  |
| Average | 86                      | 111,32 | 48                   | 56,84 |
| Median  | 46                      | 40,50  | 21                   | 23,50 |

Table 2: support to existing SMEs

The breakdown of services provided to SMEs makes us understand that access to finance is among the most requested, followed by a specific support to design and implement innovative projects. The need for innovation diagnostics is also evincible from the data collected, as 22% of the services delivered to existing SMEs are right on that target.



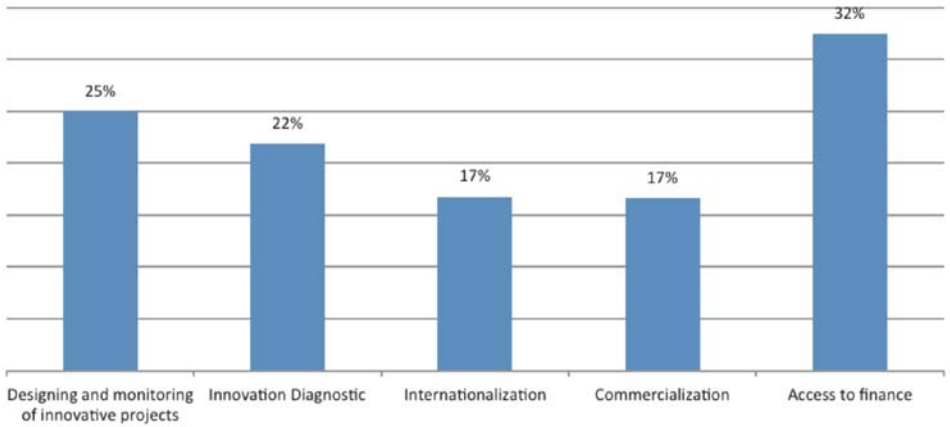


Figure 3: services to existing SMEs by typology

## INNOVATION

Innovation is of course one of the main focus of the BICs. Of all the entrepreneurial projects supported by the BICs, the level of innovation remains to date quite high, confirming that “being innovative” is one of the key characteristics of the start-ups and firms supported by a BIC.

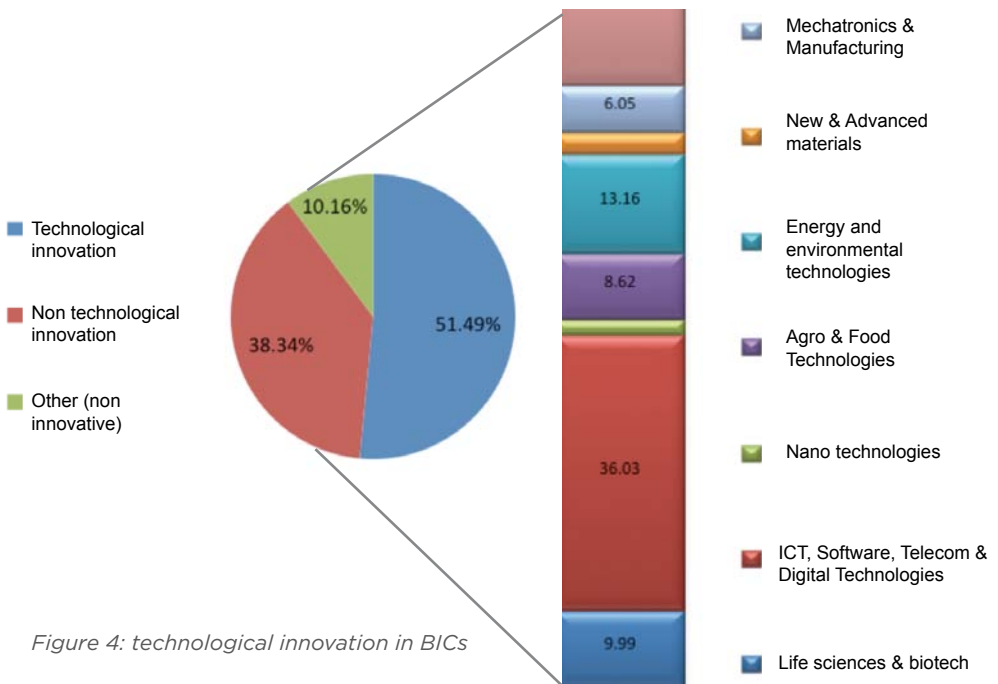


Figure 4: technological innovation in BICs

When zooming into technological innovation it is interesting to analyze what has happened during 2011 with regards to IP development. Indeed the BICs have collectively supported 2491 companies with IP issues, have requested 666 patents for companies and entrepreneurs, who have finally been granted a total of 307 patents. The figures show that there has been a decrease in the number of clients supported when compared with the 3006 supported in 2010 (variation -17%), although the EBN network has experienced an increase in both, the number of patents requested (variation +14%) and the number of patents granted (variation +15%). Another sign of the BICs' increased efficiency.

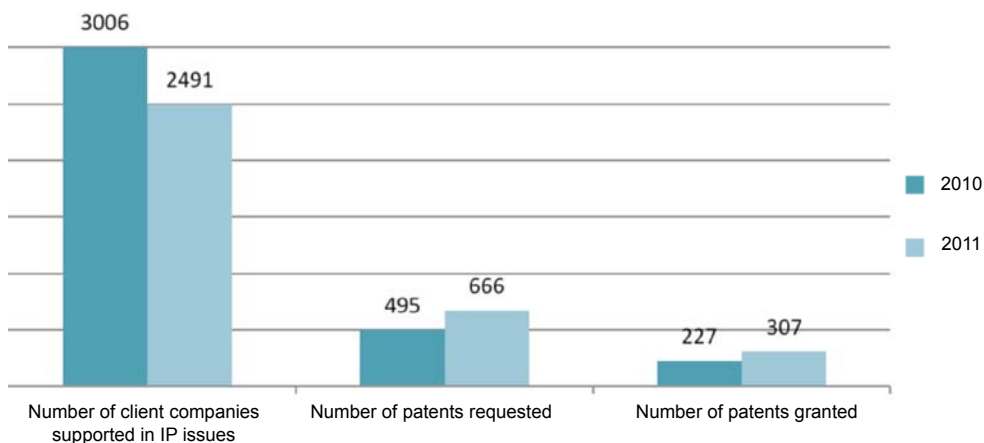


Figure 5: intellectual property

## ACCESS TO FINANCE

Over 3600 clients of the BICs have been made “ready to invest”, through the BIC’s services. This represents an increase of 22% from the year 2010, although the total amount of capital raised for the companies has decreased by 5% to an estimated total of € 300.473,76.

|         | New entrepreneur ready for investment |       | Existing SMEs ready for investment |       |
|---------|---------------------------------------|-------|------------------------------------|-------|
|         | 2010                                  | 2011  | 2010                               | 2011  |
| Total   | 1592                                  | 1688  | 1376                               | 1957  |
| Average | 12,43                                 | 12,98 | 10,75                              | 15,05 |

Table 3: investment readiness

Looking into the different sources of funding, in 2011, we can see that there have been quite significant changes since the year before. Indeed venture capital has decreased, as well as early stage funding. The “other” types of capital raised has reached 50% of the total, making it worth, next year, to investigate what actually “other” capital raised means. From a look to figure 6, it appears that government funding schemes and access to bank loans are most probably the two items which will mainly compose the “other” category. Moreover more attention should probably be made to Business Angels Investment as many BICs have developed close links with various networks.

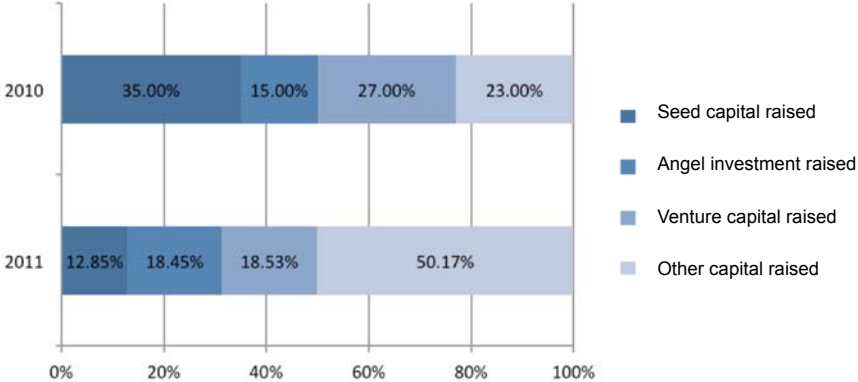


Figure 6: breakdown of funding sources

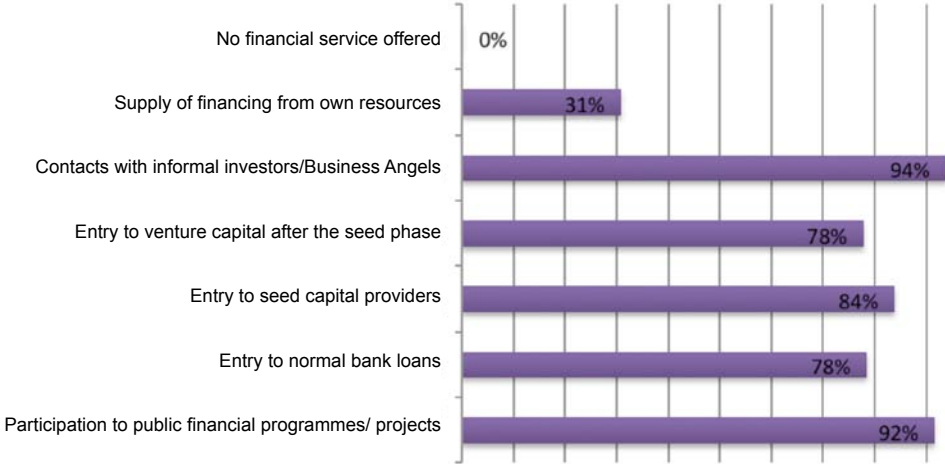


Figure 7: breakdown of financial services offered by BIC

Figure 7 above gives an initial profiling of how the BICs are actually supporting fund raising for entrepreneurs and SMEs. As could have been easily forecasted, all BICs are providing financial services under different forms using all the possible channels to get things started!

## PHYSICAL INCUBATION

| Average square meters of owned incubators |      | Average occupancy rate |      | Average incubation time (years) |      |
|---|------|------------------------|------|---------------------------------|------|
| 2010                                      | 2011 | 2010                   | 2011 | 2010                            | 2011 |
| 7549                                      | 7271 | 0,78                   | 0,63 | 3,1                             | 2,64 |

Table 4: physical incubation

Already last year we registered a decrease of the average occupancy rate, which hit the low of 78% in 2010. For 2011, as can be viewed by the table above the data confirm the trend, and we observed a decreased value of 63%. Is it a “sign of the times” which calls back the recession spectrum, which has indeed particularly affected the “property development” component of incubators? Or is it a clear indication that there might be the market is demanding for more virtual incubation services? Indeed this is not good news, but there is an opportunity to put more emphasis on the non-infrastructural “soft” components of the BICs’ service portfolio.

|         | Tenants in incubators |       | Employment by tenants |          |
|---------|-----------------------|-------|-----------------------|----------|
|         | 2010                  | 2011  | 2010                  | 2011     |
| Total   | 3937                  | 3729  | 24505                 | 19641,00 |
| Average | 31,71                 | 28,68 | 191,44                | 151,08   |
| Median  | 23,50                 | 21,50 | 98,00                 | 83,00    |

Table 5: tenants in incubators

The KPIs maybe can tell us something! The number of tenants hosted in physical incubators has seen a variation of -19,5%, a figure higher than the -15,4% variation of all start-ups created in the network, maybe providing some indications that, to some extent, there is the need to go virtual. The same exercise can be done looking

at the statistics of the employment by incubator tenants. Indeed the variation of employment in tenant companies has been of -19,8% which compared to the more general figure calculated above of a decrease of jobs created in startups of -3,1% , can be seen as a confirmation of the above statement on virtual services.

## VALUE FOR MONEY

Some interesting thoughts arise from the analysis of the value for money, specifically if we compare the figures of this year with the trends in the last years. Indeed, already in 2010 we could see that there was a decrease in the cost per job created, a decrease which is confirmed in 2011. We can also see that this decrease is accompanied by a decrease of the public financial contribution per job created. Or is it an increase of the efficiency of the BICs' services?

| Cost per job created |            | Public financial contribution per job created |           |
|----------------------|------------|---|-----------|
| 2010                 | 2011       | 2010  | 2011      |
| 12058,79 €           | 10886,64 € | 8338,79 €                                     | 7867,63 € |

Table 6: investment per job created

If the cost per job created has decreased of 9,72%, the public financial contribution has also decreased of 5,65%, which means that in relative terms there is a higher contribution per job created of the public sector in the public/private sector tradeoff, but, in absolute terms a negative variation needs to be anyway reported.

The business model of the BICs still depends heavily on public sector funding which represents 67% (63% in 2010) of the total income of the EC-BICs. The total investment of the public sector in the BICs in 2010 is estimated at € 181.582.532,00 (estimated collective amount) whereas in 2011 the estimation is of € 175.685.071,00. This variation of -3,2% can partially explain the increase in the value for money index, especially if coupled with the increased numbers of jobs created in the network (in new start-ups and existing SMEs).

|                | Start-ups per 100K€ of BIC expenditure |      | Jobs created per 100K€ of BIC expenditure |       | Business plans created per 100K€ of BIC expenditure |      | SMEs assisted per 100€ of BIC expenditure |      |
|----------------|--|------|---|-------|---|------|---|------|
|                | 2010                                   | 2011 | 2010                                      | 2011  | 2010  | 2011 | 2010                                      | 2011 |
| <b>Average</b> | 2,59                                   | 3,24 | 7,74                                      | 13,21 | 4,37  | 4,31 | 4,84                                      | 8,88 |

Table 7: value for 100k Euro of BIC expenditure

The figures above definitely confirm that there has been a more efficient use of the available financial resources and a stronger capacity and flexibility of the BICs to adapt themselves to changing circumstances. The figures below instead, are expression of the decrease in terms of start-up created and of the increase of the KPIs relative to the existing SMEs supported in the year.

|                | Start-ups per FTE member of BIC staff |      | Jobs created per FTE member of BIC staff |       | Business plans created per FTE member of BIC staff |      | SMEs assisted per FTE member of BIC staff |      |
|----------------|---------------------------------------|------|--|-------|--|------|---|------|
|                | 2010                                  | 2011 | 2010                                     | 2011  | 2010   | 2011 | 2010                                      | 2011 |
| <b>Average</b> | 2,92                                  | 2,60 | 8,74                                     | 10,82 | 4,94   | 4,23 | 5,77                                      | 8,07 |

Table 8: value for FTE member of BIC staff

Among all the statistical calculations that stem out of the dataset, the value for money in terms of cost per job created in terms of public financial contribution per job created, provide probably the most powerful information on the impact BICs can achieve. A public financial contribution of less than € 8.000,00, representing 72% of the actual funds needed to create a job, with a survival rate of around 90%, is quite a unique argument demonstrating that the BICs' community has a strong and efficient impact on the economic regeneration process and on the generation of new firms and jobs. A mission of clear public interest, powered by entrepreneurs.

The public sector is of course heavily involved, as can be seen in table 9, which reports the degree of ownership (in terms of voting rights) of the BICs. However, the involvement of the public sector could and should be upgraded, in order to provide more resources investing in human capital (and less on physical

infrastructures), the human skilled and experienced human resources who can be engaged in boosting the BIC's value chain, with a net positive leverage effect on the creation of firms and jobs and on the development of competitive SMEs.

This report demonstrates that investing in BICs is a safe and sound investment for the public sector. A low-risk investment, as the survival rate is very high, with high and fast returns since in less than 1 year the public sector will get its investment back thanks to the increased tax inflow it has generated supporting the creation of new jobs.

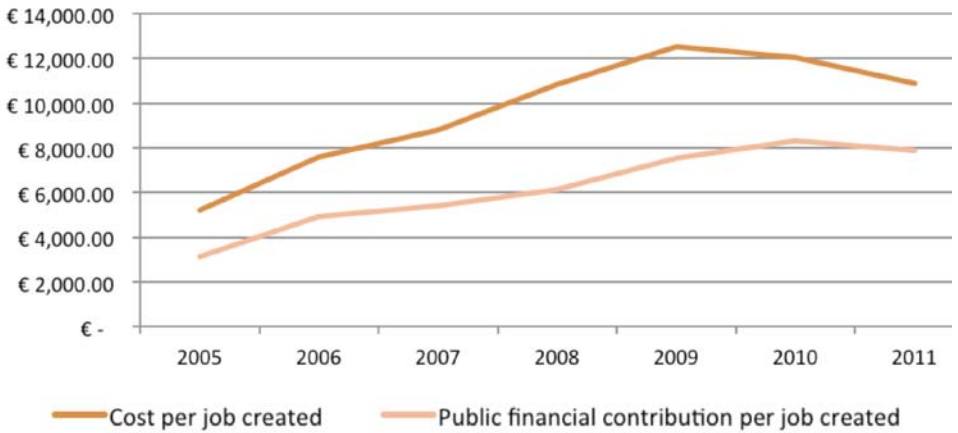


Figure 8: some trends of BICs' value for money

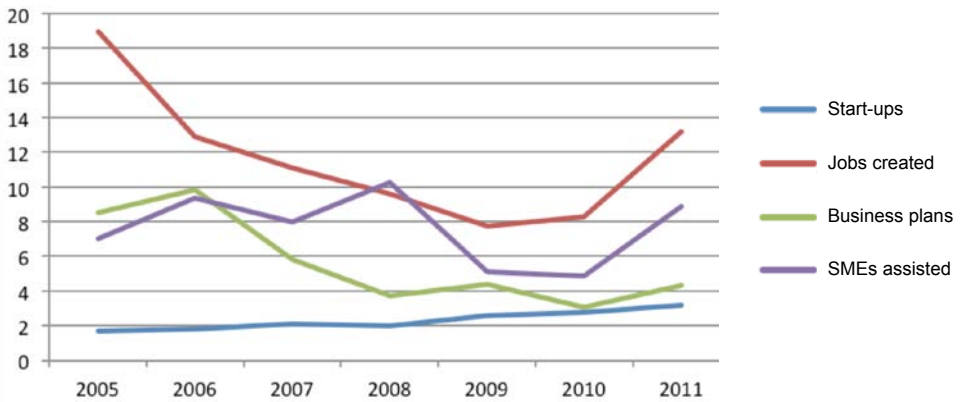


Figure 9: trends of some KPIs per 100KD of BIC expenditure



# PROFILING THE EC-BICS

## OWNERSHIP AND INFLUENCE

Generally, in 2011, there has been a slight increase of the number of organization engaged in the BICs' governance, although, interesting enough, the percentage of public bodies' ownership has increased from 68,48% to 71,20%, confirming the high involvement of the public sector as BICs' shareholders.

|               | Public Bodies | Private Bodies | Total   |
|---------------|---------------|----------------|---------|
| Number        | 667,00        | 1182,00        | 1849,00 |
| Ownership (%) | 71,20         | 28,80          | 100,00  |

Table 9: BIC ownership

Expectedly the main public shareholders of BICs are representations of local administrations (regions, local governments and municipalities - NUTS 1, 2 and 3 levels) which count up to 64% of public sector ownership. As for private sector ownership, it is worth to mention that the majority of private shareholders are actually enterprises (38%).



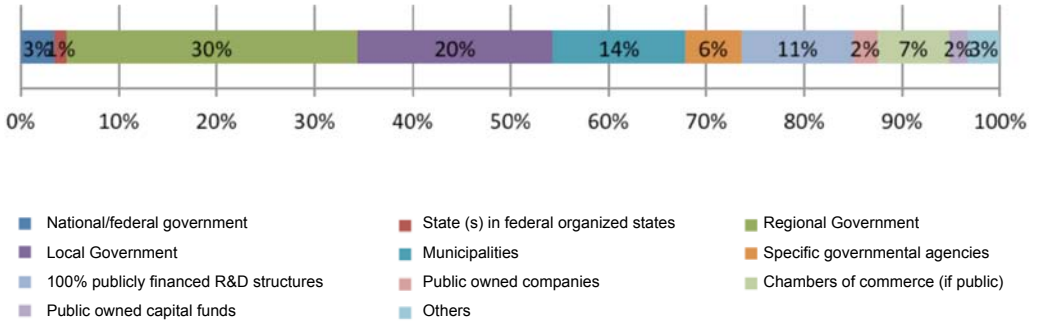


Figure 10: breakdown of public sector shareholders in BICs

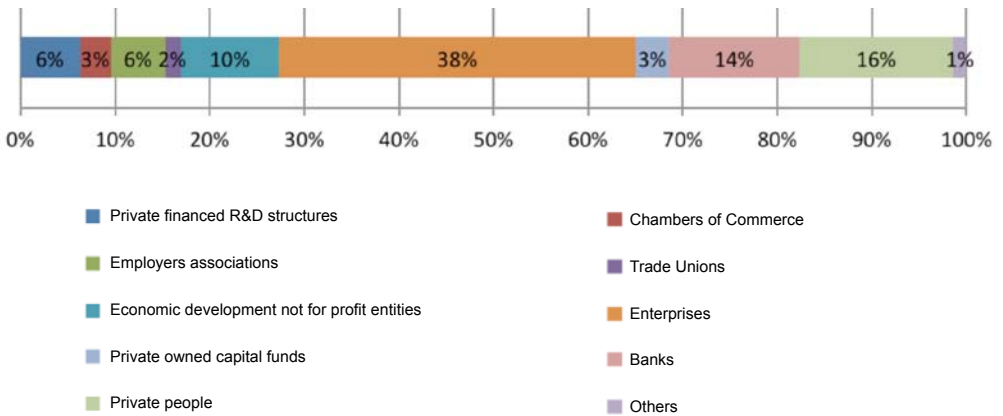


Figure 11: breakdown of private sector shareholders in BICs

The catchment area of BICs is very much local and regional. BICs are and remain local tools to support entrepreneurship and are acknowledged mostly by regional and local administrations, although, to be noted, national governments are also more and more recognizing the role of the BICs.

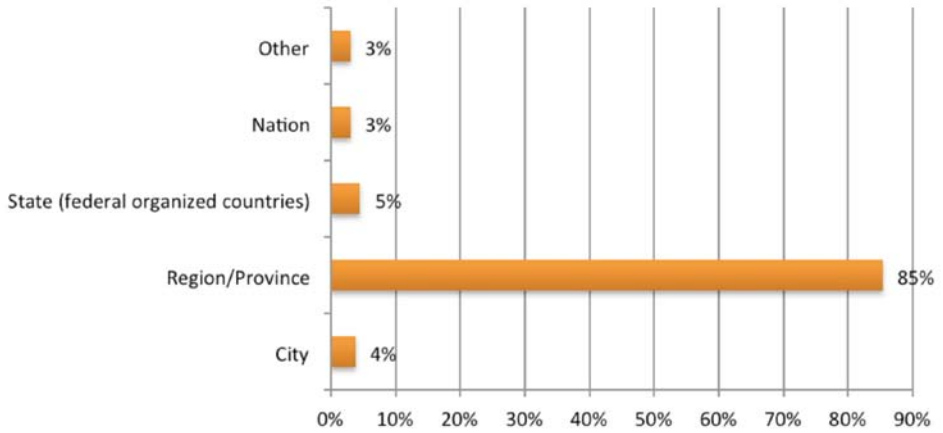


Figure 12: catchment areas of BICs

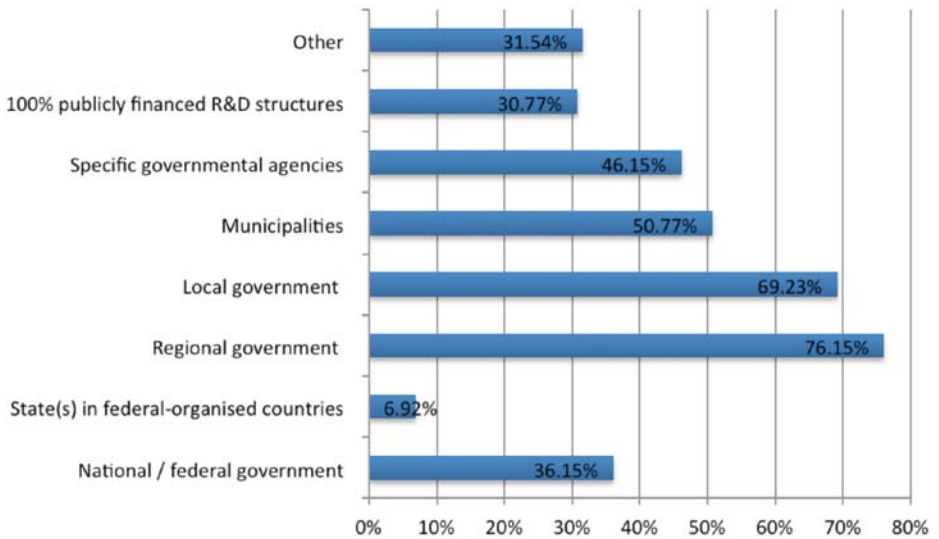


Figure 13: public sector acknowledgment of BICs

# HUMAN RESOURCES & EXPERTISE

A little over 2100 people have been employed overall in BICs in 2011, and since the core mission of the BICs is to sustain entrepreneurship, 28% of these were directly involved in entrepreneurial guidance activities.

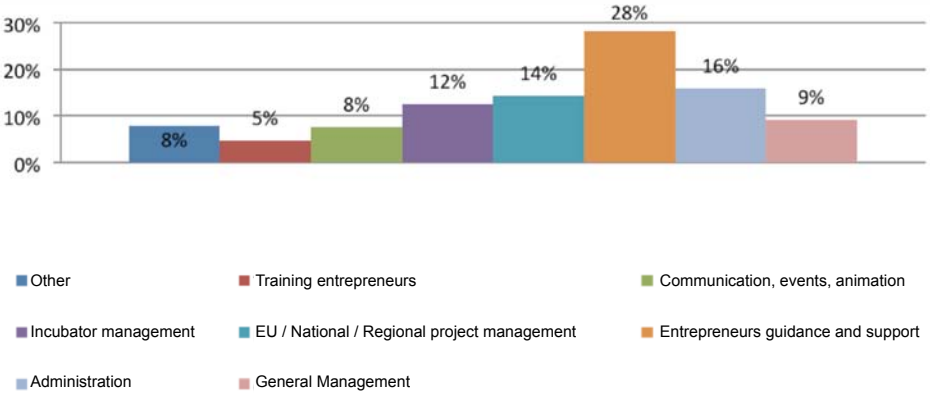


Figure 14: human resources, breakdown by role

In terms of BICs' size measured by number of employees, the modal value is the range 7-9 followed closely by the range 3-6. BICs are still flexible organizations who tend to internalize a substantial portion of the required expertise.

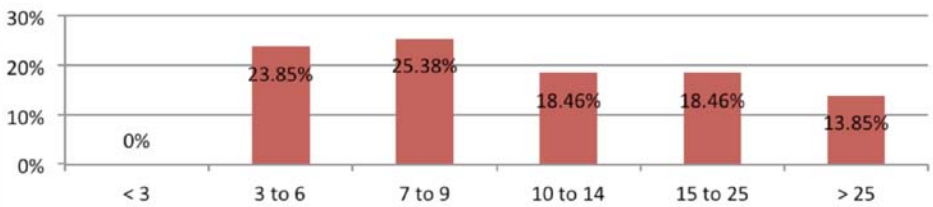


Figure 15: BICs size (staff)

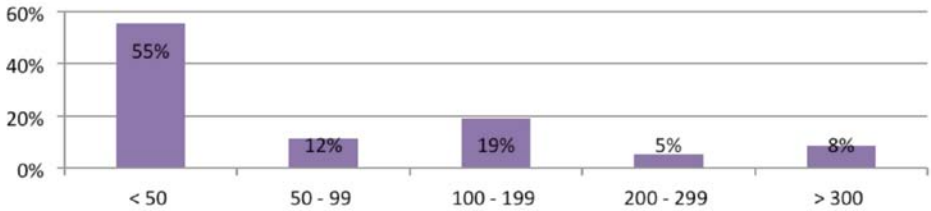


Figure 16: man/days of external expertise used by BICs

As last year's survey showed, also this year, it is clear that the key areas of expertise of the BICs are the creation and support of high-tech SME creation and support and access to finance.

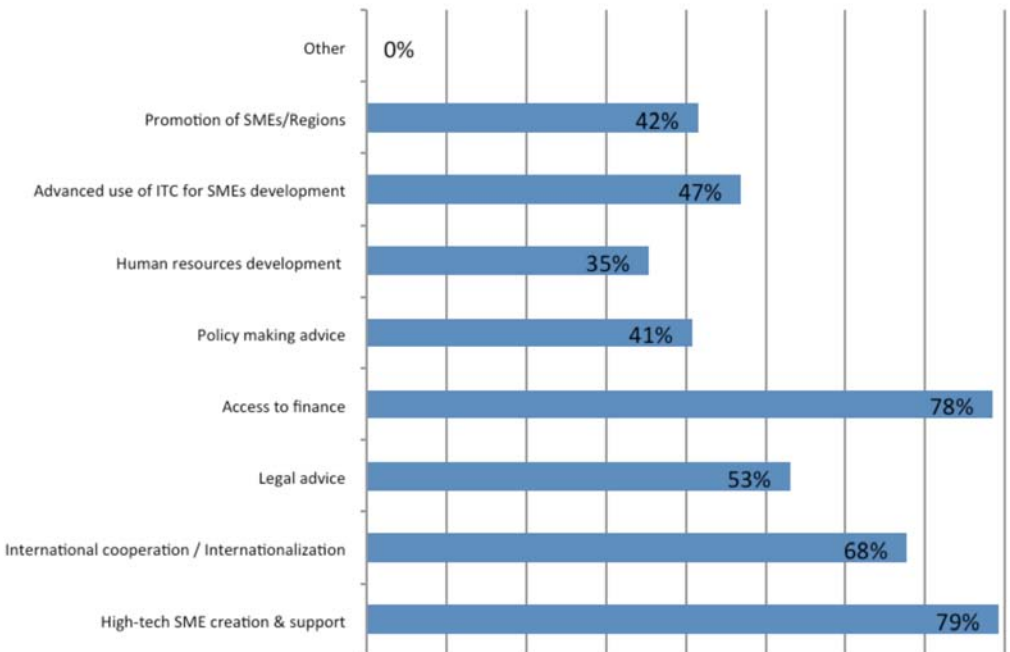


Figure 17: BICs' core areas of expertise

Internationalization services are also extensively delivered by the BICs. Indeed 68% of the BICs are actually providing these services through in-house schemes or in partnership with partner organizations, including through the newly established EBN soft landing platform.

The overall other services offered by BICs, besides their core area of expertise, relate mainly to the provision of specific training and the set-up of international and national projects as well as to specialized technology support.

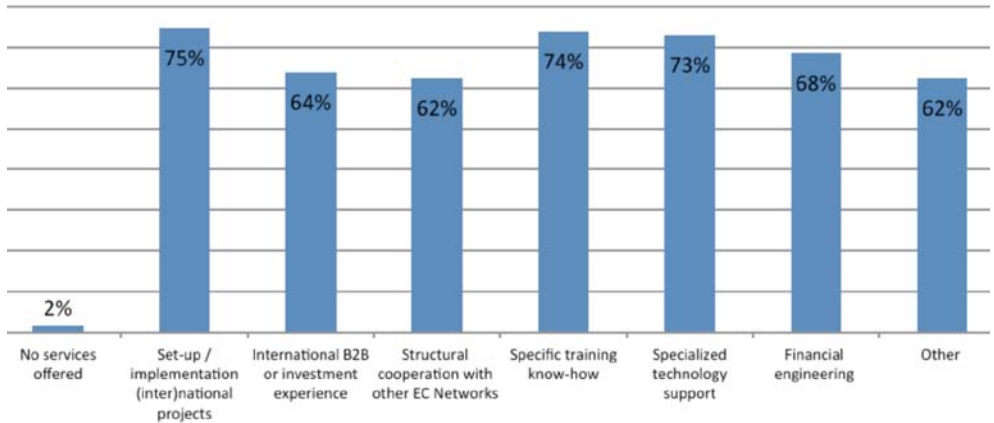


Figure 18: additional services offered

## SERVICES

This expertise translates in specific services and in a specific set of tools and procedures that each BIC delivers and implements on a daily basis. Services directed to new entrepreneurs for the creation of new start-ups, as well as to existing SMEs of an area, intended to increase the efficiency with which they go to market.

### SERVICES FOR NEW START-UPS

Confirming last year's analysis, the BIC's appear to provide a wide range of services to new entrepreneurs and appear to be well equipped! All of them provide financial support and the overwhelming majority provides support in the pre-incubation phase (before the actual creation of the firm).

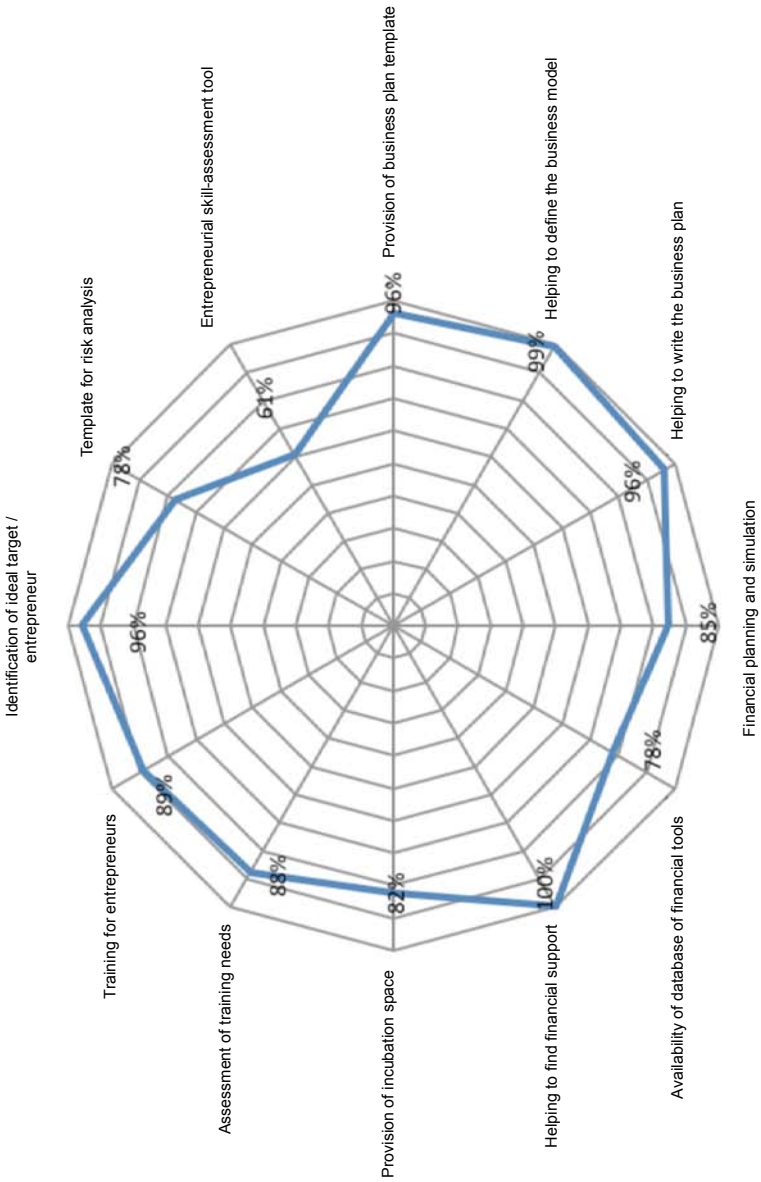


Figure 19: services to new entrepreneurs

Much action takes place when it is time to promote entrepreneurship. Indeed over 4200 events have been organized across the network and these have been attended by more than 158000 people, while when it comes to training over 5200 training sessions have been organized for more than 58000 participants. The breakdown of training topics by BIC can be seen in figure 20.

|         | Events organized to promote entrepreneurship |      | People that attended events to promote entrepreneurship |        | Training events for new entrepreneurs |      | New entrepreneurs that attended events |       | Training events for SMEs |      | People that attended events for SMEs |       |
|---------|--|------|---|--------|---------------------------------------|------|--|-------|--------------------------|------|--------------------------------------|-------|
|         | 2010   | 2011 | 2010  | 2011   | 2010                                  | 2011 | 2010                                   | 2011  | 2010                     | 2011 | 2010                                 | 2011  |
| Total   | 3925   | 4208 | 168284  | 158296 | 4506                                  | 5280 | 62978                                  | 58661 | 2003                     | 2300 | 36120                                | 33877 |
| Average | 30,66  | 32,4 | 1314,7  | 1217,7 | 35,20                                 | 40,6 | 492,00                                 | 451,2 | 15,64                    | 17,7 | 282,18                               | 260,6 |

Table 10: promotion of entrepreneurship and training.

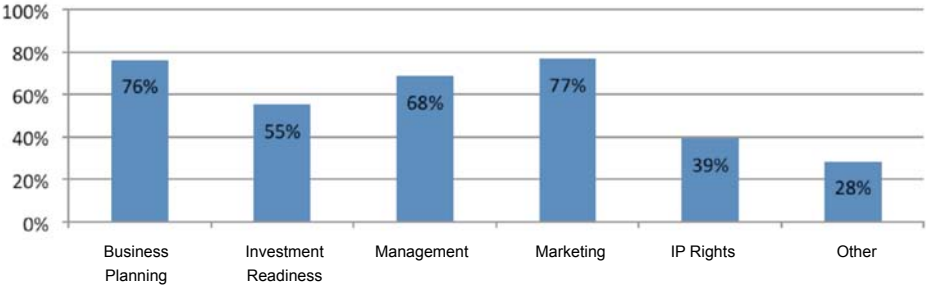


Figure 20: breakdown of trainings for new entrepreneurs by topics

Many topics are taught in BIC training, but the most frequent are the classics! Indeed marketing, business planning, management and investment readiness remain in the top list.

## SERVICES FOR EXISTING SMES

Apparently SMEs are looking for specific programs to develop innovations in their own companies, which of course brings the case of serious innovation diagnostics to be undertaken by the BICs (22% of the services delivered to SMEs are innovation diagnostics as per figure 3).

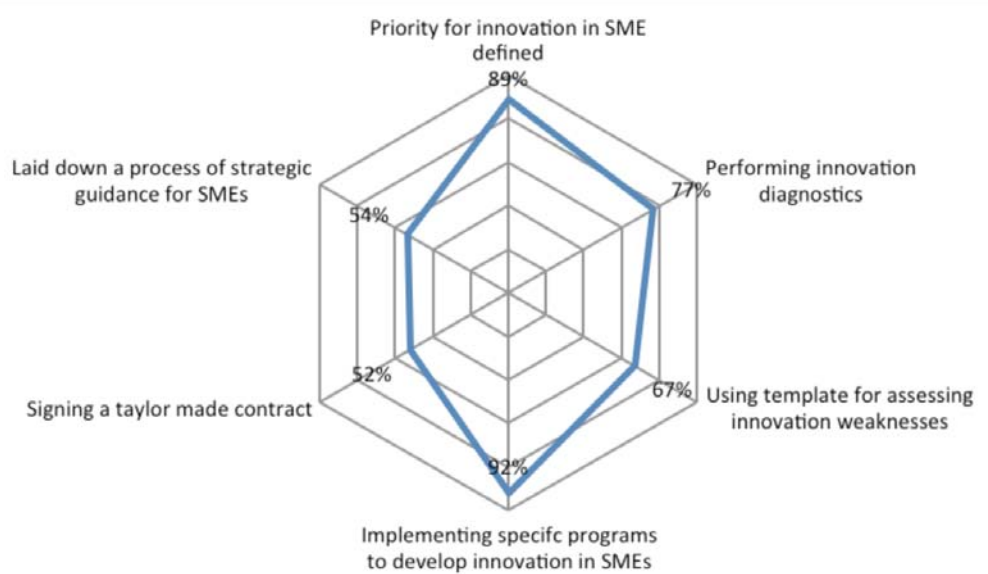


Figure 21: services to existing SMEs

Training activities have been organized throughout the network also for existing SMEs. 2300 events have been organized in 2011 which saw the participation of more than 33500 SMEs.

It is possible to zoom into the development of innovative projects for SMEs and to understand the content of these projects. Overall 75% of the BICs are creating and supporting SMEs with projects relative to the establishment of cooperation among the SME themselves and the R&D institutions of the area. More than half of the BICs (55%) are developing international technology transfer opportunities as well as SME specific financing schemes. Also cross-border cooperation programs hit high in the list (50% of BICs), as internationalization of businesses remains a high priority.



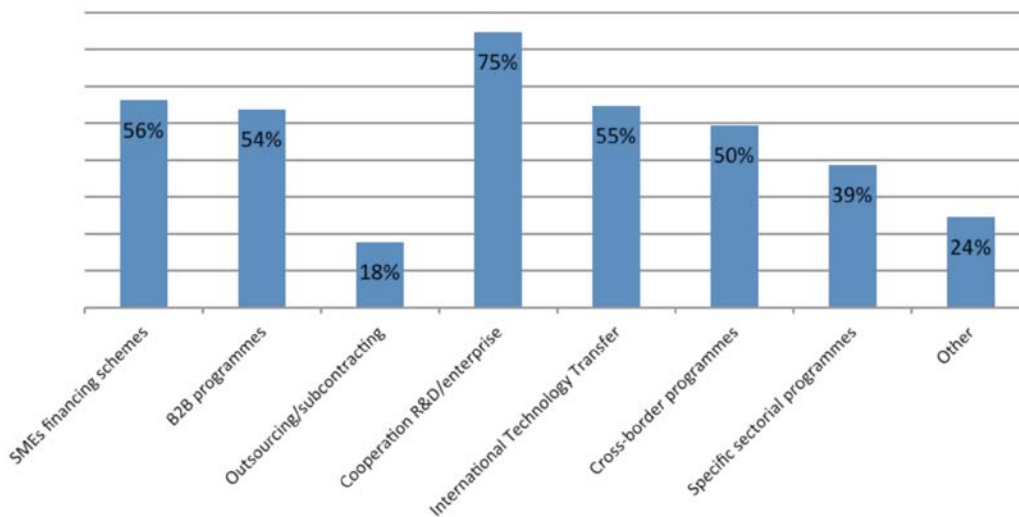


Figure 22: programs to develop innovation in SMEs

Internationalization services are requested by SMEs and significantly delivered by BICs. Indeed 95% of the BICs report being ready to provide services for SMEs to start international business, and 72% of the BICs have reported doing assessments on internationalization needs.

## SIGNPOSTING

Cooperation with other organizations for internationalization activities is quite strong. As can be seen in the figure below BICs signpost for such services mostly to Chambers of Commerce, to governmental export agency and to private consultants. Cooperation in this respect with the Enterprise Europe Network involves 50% of the BICs.

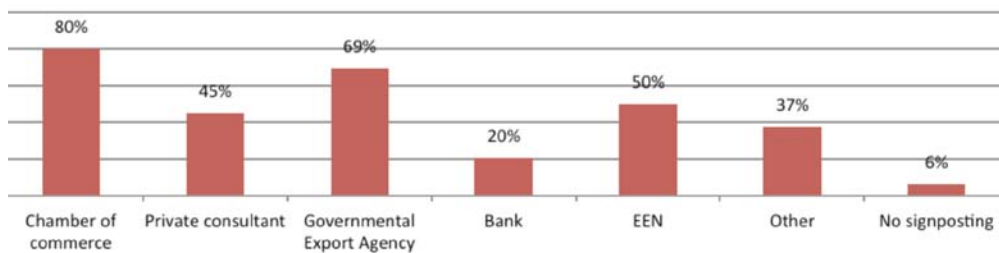


Figure 23: signposting for internationalization services

More generally the BICs rely on their network to be able to both, provide a fully comprehensive range of services, and to make sure these are properly tailored to the needs of the entrepreneurs and SMEs. Indeed no BIC reports operating alone, without partnering nor signposting activities! Legal and accountancy services are heavily signposted, as well as the services related to expertise on intellectual property rights.

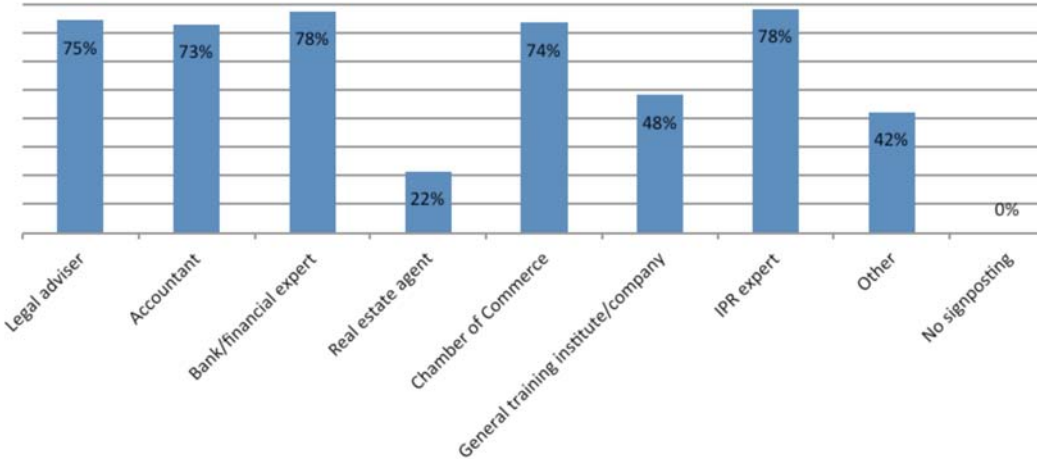


Figure 24: signposting

## BUSINESS MODEL

As already reported above BICs rely for two thirds of their needs on the public sector. There is of course a direct correlation between the public sector benefitting from the BICs' actions and the public financial contribution affecting the overwhelming majority of the BICs (only 1 BIC reports not receiving funds from the public sector in 2011).

Subsidies play a great role here. Indeed if we add up the values of income coming from national, regional and local bodies, structural funds and other public subsidies, we reach a figure of 58%.

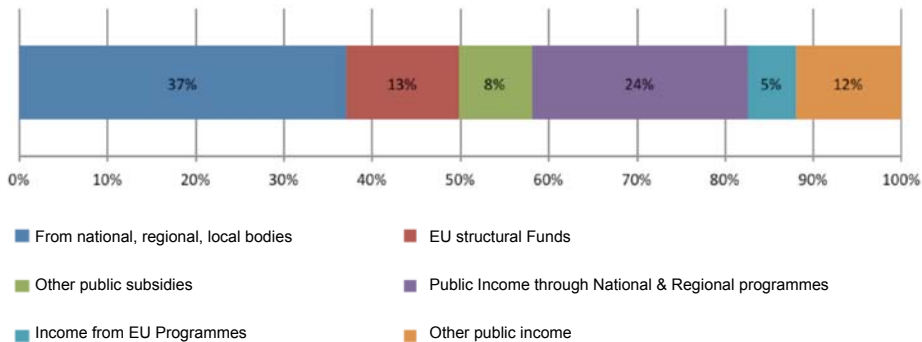


Figure 25: public sector income

A closer look into the breakdown of private sector funding will reveal that 79% of it is coming from the management of the incubator (rentals) and fees for services (for tenants, entrepreneurs and existing SMEs).

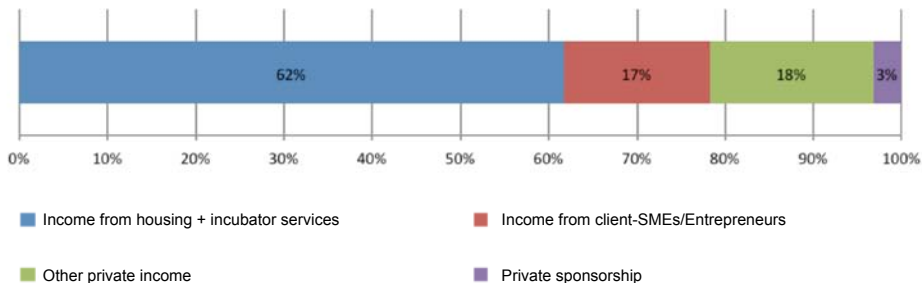


Figure 26: private sector income

On the expenditure side, the most important items are those relative to human resources: staff costs (42%) and external expertise (15%). Overheads reach 20% of total expenses, while maintenance of the incubator buildings sums up to 11% of total expenditures.

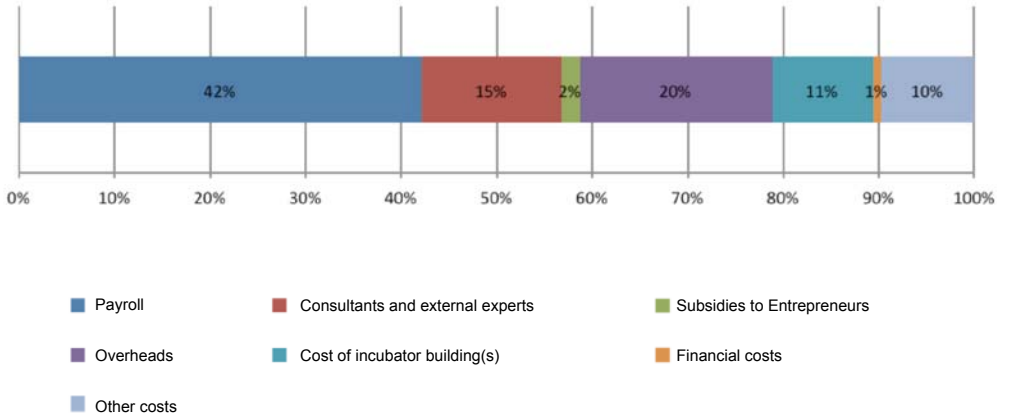


Figure 27: BICs expenditures



# CONCLUSIONS

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*By Philippe Vanrie, EBN CEO*

Interesting things have happened last year! After more than a quarter of a century, EBN can again demonstrate that BICs still represent one of the most efficient answers for creating new firms, generating jobs enabling applied innovation across SMEs, and stimulating local and regional economies.

Further challenges are awaiting BICs in the near future as new trends, alternative methodologies and advanced tools are emerging. Living labs are booming, the co-working movement is growing, open innovation is revealing its potential, angels funds and crowd funding are catching the entrepreneurial communities attention, not to mention the new wave of acceleration programs. I see that BICs are more and more able to integrate these new trends through a cooperative mindset rather than a competing attitude, which again confirms the findings of the observatory report, where comments were made about the real capacity of the BICs to adapt to new contexts.

The current challenging economic times actually present extraordinary opportunities for enhancing the competitiveness of organizations through innovation, cooperation and entrepreneurship. We strongly believe that bottom-up micro-economic initiatives (enterprise creation and development based on innovation and collaboration) can significantly and positively affect the macro-economic landscape. Communities of professional enablers such as BICs, Incubators and similar organizations are efficient generators and accelerators of entrepreneurial innovations and the engine for building myriads of micro & mezzobusiness objects.

The European Economy needs to enhance the operational efficiency of the delivery mechanisms through which challenges are addressed and solutions are delivered! As described in the statistics above, BICs and their stakeholders are offering the perfect “start+growth packages” to their innovating customer-entrepreneurs, delivering their double mission of public and private interest with dedication, professionalism, intelligence and an impressive value for money!

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