

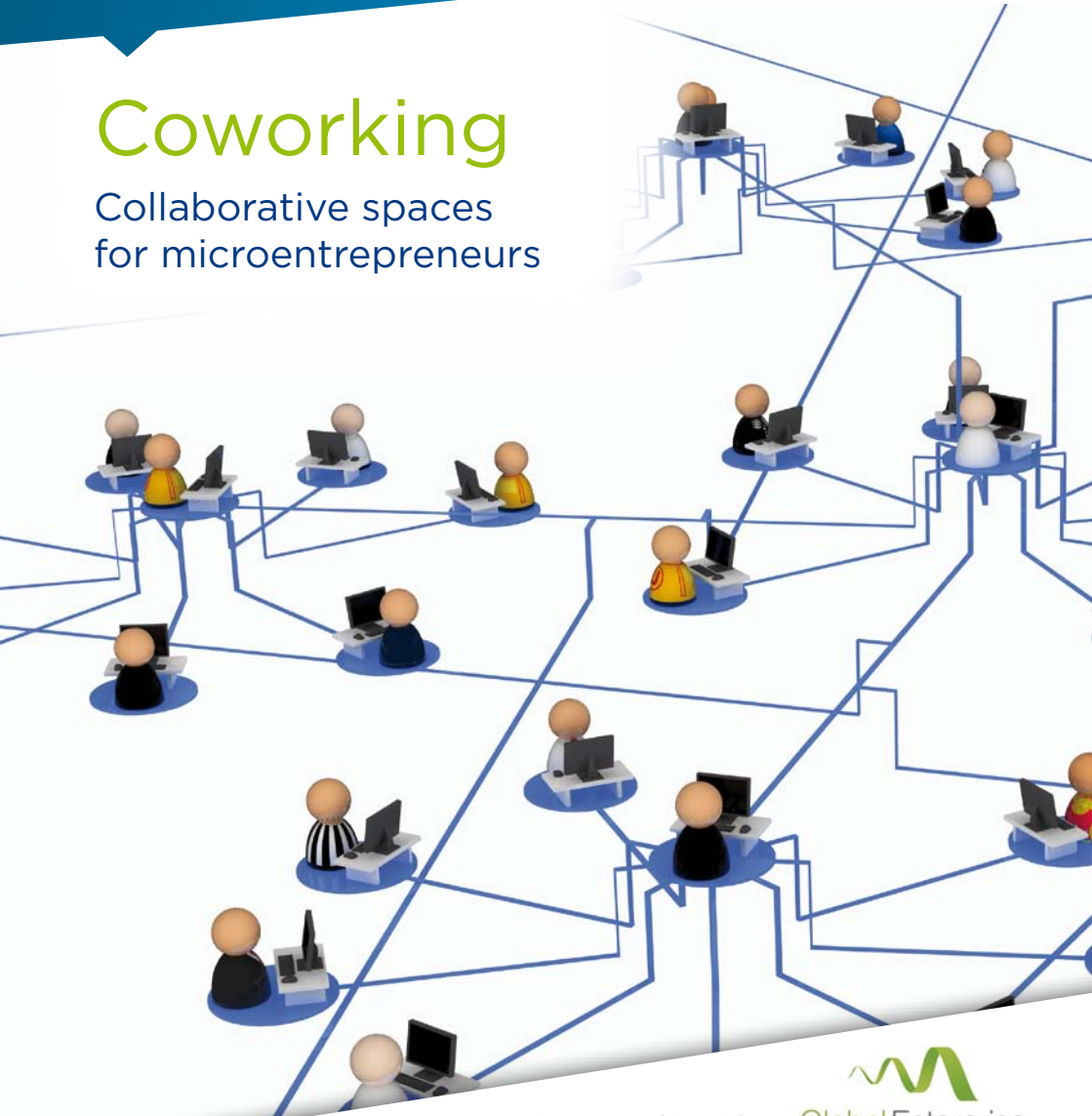


TECHNICAL NOTES

#01
OCTOBER 2012

Coworking

Collaborative spaces
for microentrepreneurs



in partnership with



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Contents

01 Introduction - A changing model	4
02 Coworking: main features	6
Facts and figures	6
Diversity in space	7
Public and private partners of coworking	7
Building communities of entrepreneurs	10
Easing connections with the outside world	10
Facilitating serendipity	11
03 Hybrid coworking: integrating coworking in traditional structures	12
The Incubators' interest	14
North-East England BIC, Sunderland, United Kingdom	14
Toulon Var Technologies, Toulon, France	16
BIC Gategarching, Munich, Germany	18
Conclusions	20
04 Credits	23

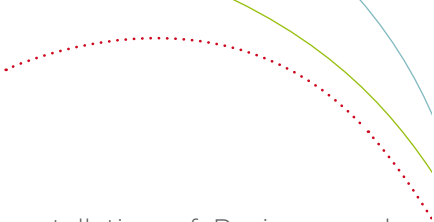
Introduction: a changing model

Often, when people first hear about coworking, they reckon the concept has been around for a long time. Some have even experienced it. Indeed, the principle of coworking is pretty simple: individual workers come to the same open space to work on their own projects... together.

The rise of new mass technologies has dramatically influenced the way people schedule and manage their working time. Nowadays, an average knowledge worker can be fully equipped with a total investment of around 2.500 €, to cover the costs of a laptop and a mobile phone, the setting up of a professional email account, a package of basic working software (spreadsheets, text editing, accounting, etc.) and an annual subscription to a mobile phone operator (voice and data).

This new technical context has eased the birth of a generation of nomad and flexible workers, who have the opportunity to work at the most suitable place for them, according to their available time, to their specific agenda or even to their spur-of-the-moment desires: home, corporate headquarters, clients' offices, cafés, restaurants, railway stations...

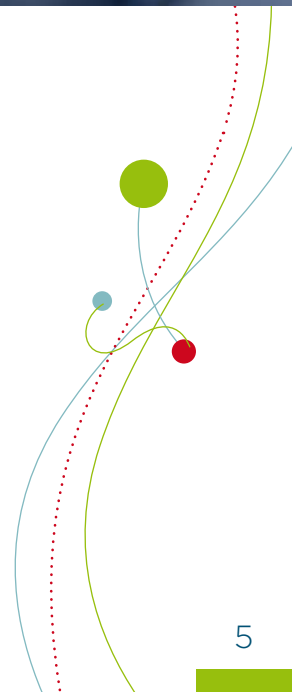
Although this rising decentralised working model sounds exciting for many freelancers, entrepreneurs, startup owners or regular employees, it does bear the risk of losing, due to over-nomadism, the advantages associated to the social capital one builds in a traditional, centralised, working environment. Today, social capital, the personal network anyone builds around her or himself, is one of the main assets owned by individuals. The development of personal networks increases the chances of acquiring the right skills needed to build micro-ecosystems around individuals. Starters and innovators need constant feedback. The quicker it arrives, the better. Personal trust breaks formalities and speeds up processes.



The European constellation of Business and Innovation Centres and innovation-based incubators nurtured the last generation of innovative companies. Coworking is a fast emerging model poised to achieve the same values and goals as the BICs. In fact, the changing technological and business environment is a reality for BICs as well. The needs of Tenants, of innovative teams or even of occasional users have dramatically changed in the last decade, and this change is far from stopping. BICs and innovation-based incubators may need to update and integrate their range of services and maybe re-think their space logistics as well.

Coworking has grown as a convincing answer in Europe, North America and elsewhere, and coworking practices and spaces can be integrated in the BICs to become an integral part of the overall service portfolio for the new entrepreneurs of today and tomorrow. BICs and Coworking spaces are not indeed competitors. They complement each other. Coworking spaces and BICs can learn a lot from each other's experiences and together support the growth of a new generation of entrepreneurial and innovation ecosystems.

The goal of this White Paper, co-created by EBN and Global Enterprise, is to shed some light on the Coworking megatrend and to support the BICs and Incubators in determining how to best use and integrate the coworking experience to fit it in the changing economic/technological and social environment they face in their daily activities.



Coworking: main features

Facts and figures

Citizen Space, renowned for being the first coworking space, was created in 2005, in San Francisco. Since then, coworking spaces have mushroomed all over France, Italy, Belgium, Germany, Poland, the U.S., Russia, Brasil, Japan, China and others. So far, nearly 1.800 spaces have been created all over the world¹.

Although this dynamics is still in its early stage, its growth is accelerating. North America and Europe are leading the movement, but the dynamics has become truly global. The coworking movement is burgeoning in Asia and South America and coworking is reaching the shores of the African continent, with coworking space projects starting up in South Africa, Ghana, Tunisia, Egypt and Madagascar. Everywhere in the world, thousands of entrepreneurs or freelancers equipped with a simple laptop are working every day from a coworking space, shaping the new generation of workers and innovators.

Coworking is not only about sharing a physical space but also about establishing a community of likeminded people who share the same values and enjoy creating synergies. Coworking is reflective of new values surfacing in today's working world, society and economy.



¹ Figures provided by Deskmag, the "Coworking Magazine". Summer 2012

Diversity in space

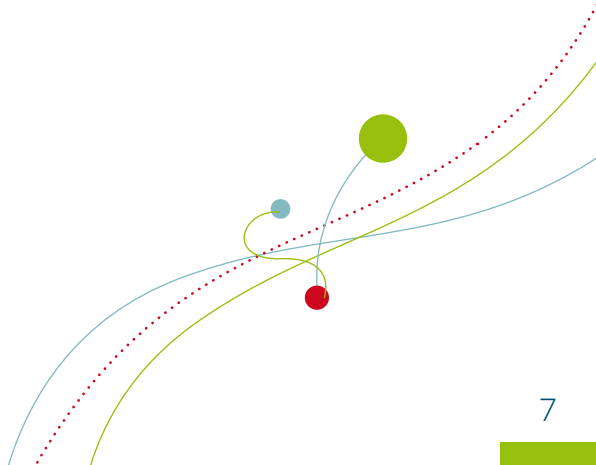
The coworking landscape is hugely diverse and will likely remain so. Some spaces are small, while others are pretty large, up to 400 seats. Some spaces are in their early stage, others are more mature. Some are publicly supported whereas others are fully privately owned.

The profile of the tenant can vary greatly from coworking space to coworking space. Professionals from the web and IT industries, freelance developers, designers, PR people, journalists, copywriters, for instance, used to be the most frequent users of coworking spaces. Nowadays, with the growth of the coworking offering, the spectrum of users is broadening to lawyers, architects, accountants, industrial engineers, sales people, marketing experts, HR coaches, corporate employees and artists, among others.

Coworking spaces often have become a preferred working environment for self-employed people starting new projects and activities. Consequently, Coworking spaces become creative and energetic spots where innovators of all kinds interact, share, build and co-create new, improved and sometimes mutually supported projects.

Public and private partners of coworking

Most of the coworking initiatives, so far, have been set up as independent projects, bootstrapped by entrepreneurs or associations of volunteers. However, in countries like Germany, France, Belgium, the UK and the U.S., public and private institutions have started to acknowledge the potential role of coworking as a catalyst for entrepreneurship and innovation.



Examples of public support to Coworking

In France, the public authorities of the Paris - Ile de France region is actively supporting the “La Cantine” coworking project via its broader support to Silicon Sentier, an ecosystem of professionals and companies focused on digital industries.

The city of New York has supplied a grant to Sunshine Bronx Business, a major coworking space and incubator, located in the heart of the Bronx.

The city of Chandler, Arizona, supports GangPlank, a suburban coworking space which hosts starters and innovators looking for coaching and support.

Coworking private support examples

In London, TechHub, a coworking space and startup incubator is sponsored by Via (a subsidiary of Telefonica, the Spanish telecom incumbent), Pearson and Google.

In France, the publishing industry has invested in an incubator and coworking space named “Le Labo de l’édition” in order to investigate new digital opportunities.

PepsiCo has set up a partnership with WeWork Labs, a pure coworking player, which includes financial support to a coworking space.

What is Coworking and what is not

Hyper-flexible and focused on the individual users

Coworking and traditional flexible/open working environments differ from a user perspective. Coworking spaces mainly host individuals. They usually don't host organisations. Moreover, the contracting commitment of a user with his/her coworking space is very flexible and short – one or two months, on average, as opposed to several months or years for other kinds of office services and leases.

Coworking is not a shared office

Another common misunderstanding lies, sometimes, in the confusion between the coworking and the shared-office concepts. The shared-office concept implies that someone rents or owns an office space along with someone else. The people in that office are always the same. In a coworking space, workers come and go. Due to its very flexible membership model and openness, users change from one day to another.

Coworking isn't just a physical facility

Having a modernly designed, shiny, colourful workplace is by no means enough to call a space a “coworking space”. Human centric animation services must be provided. The coworking space manager plays a critical role in that regard. The manager makes sure people interact, creates connections and opportunities, and promotes a positive, creative and convivial climate.

Coworking is about community

Again, Coworking is not only about sharing a physical space. It's about establishing a community of likeminded people who share the same values and enjoy creating synergies. Coworking is reflective of new values surfacing in today's working world, society and economy.

Building communities of entrepreneurs

The values, atmosphere and energy of different places greatly influence the way people behave and contribute to define their personal system of references.

Coworkers usually share the same values of creation, openness, collaboration, innovation and entrepreneurship. Meeting and chatting with other people about shared concerns, beliefs and expectations triggers a feeling of belonging. Coworkers feel they are part of the same community, of a common social group.

Since most of the members of a coworking space typically enjoy a certain level of autonomy, as they are on their own, they can partner very fast with other independent workers on new entrepreneurial projects. According to the Coworking Europe 2010 survey², 87% (out of 50 surveyed European coworking spaces) reported of new projects being born in their space thanks to tenants who met and chose to partner within the coworking space.

Thanks to this community feeling, members are highly accessible. Any starting entrepreneur might get helpful tips from other tenants, specialised in various fields, or, more simply, may gain access to the views of more experienced people. Businesses can be bread in a more organic, bottom-up manner.

Given a limited spatial capacity, more innovators get involved in start-up initiatives if this is rented through a coworking model rather than by traditional renting models, feeding the partnering potentials previously addressed.

Easing connections with the outside world

A coworking space is an open platform where all are welcome to enter and leave. Tenants pay according to the time they effectively spend in the facility. Moreover, there is no pre-filtering. Everyone is welcome. Entrepreneurs, freelancers and innovators choose their coworking space rather than the contrary. This is one of the differences from BICs and incubators, where a selection based on the sustainability and on the innovative characteristics of the projects occurs before acceptance.

² Coworking Europe 2010 survey, issued november 2010



Indeed, the space managers work more as community managers. They are the connectors between the coworkers. Besides managing the operational side, they communicate massively about life within and in the surroundings of the coworking space. They are responsible for filling in the agenda with frequent events, seminars, workshops, training or coaching session in order to energise the space and the community.

Although traditional communication means, such as newsletters or media contacts, remain in use, much of the outward communication is transferred digitally in social networks, facilitating therefore the possibility for outsiders to get in touch with coworking spaces and their tenants, according to specific needs, requests or propositions. Being part of a coworking community increases, also, the visibility of isolated entrepreneur members within the local ecosystem and beyond.

So, the accessibility factor offers innovators and entrepreneurs additional opportunities to test their ideas and get rapid feedback from potential customers and users.

Facilitating serendipity

Due to the circulation of like-minded people induced by flexible membership models and to the frequent happenings organised on the spot, coworking spaces facilitate serendipity³. The likelihood of finding other people, getting in touch with new ideas and leveraging the diversity of the world is higher in a coworking space than in many other working places.

³ Serendipity is the principle of accidental encounters, at the roots of unexpected, original things.

Hybrid coworking: integrating coworking in traditional structures

Coworking is no longer an isolated movement limited to independent and freelance workers as it often used to be in its origins. Institutional players, such as entrepreneurship centres, innovation centres, BICs and incubators, recently started to add coworking spaces to their own structures with the intent of increasing their support services for innovation and entrepreneurship.

The University of Harvard, for instance, funded I-Lab, a US\$ 20 million bottom-up innovation platform. The project is experimenting a coworking-like approach. I-Lab aims at becoming a bridge between the Harvard organisation and the network of small and medium-sized businesses, entrepreneurs and even non-profit organisations within the local ecosystem surrounding the campus. In such a fashion, they can also benefit from the support and innovation power coming from the institution. “The Innovation Lab is an entirely new model for Harvard. It is an innovation in and of itself”, says Gabe Handel, the managing director of the Harvard Business School Dean’s office. “I-Lab is equipped with a coffee shop and a 24/7 public meeting space, and will host networking events, presentations, and lectures for residents, small business owners, faculty, and students across Harvard’s schools”, he added.

The Aalto University, near Helsinki, in Finland, made a similar step towards a bolder support to entrepreneurship. The academic institution has built a platform for project developers, students, researchers or professors aiming to launch new innovative businesses.

The Aalto Startup Garage puts the users in touch with venture capitalists and business coaches. Moreover, it offers a coworking space for all projects starting individually or collectively. It organises frequent seminars and conferences in order to stimulate networking and knowledge sharing between members, and between members and non-members.

Seedspace is part of Georgia Tech's Advanced Technology Development Center (ATDC), a 30 year-old incubator and business accelerator for innovative startups based in Atlanta. In 2009, ATDC opened a 250 sq.m. coworking space for very early-stage entrepreneurs. Indeed the Seedspace open platform serves as an entry door for accessing the incubation services (coaching, technology support, funding services, etc.) after the project idea has entered a sufficiently advanced maturity stage.

Hybrid coworking could grow in popularity in the coming months and years, as historical players in business, real estate and/or innovation operators look at the coworking model as a product they could add in their service portfolio.

Carolina Rendeiro, president of the Office Business Center Association International (OBCAI), for instance, believes coworking will play a role in the future of the business centres industry. "Now more than ever, we as an Industry need to embrace the new phase of change that is not coming but is here already", she writes. "Industry leaders are embracing these changes, by creating hybrid-coworking spaces within our business centres. This is just not designating an area, but actually providing the necessary infrastructure for this hybrid, from the latest in technology infrastructure and collaborative furniture, that the corporate mobile worker now seeks".

The evolution is not a one way journey, though. Coworking spaces themselves start to offer new kinds of support services for startups.

General Assembly, in New York, is a coworking space which defines itself as a profit-making job creation engine, establishing a sense of community among creative and entrepreneurial people. The company offers supports services for startups such as trainings, coaching, virtual technology test beds, etc.



The Hub Bay Area is another major coworking space split between two locations (one of them close to Berkeley university), which hosts more than 1.000 tenants. Just as General Assembly, The Hub Bay Area offers concrete support for entrepreneurs such as “weekly peer review sessions, mentor office hours, speaker events, and focused workshops on topics such as Design for Impact, Fundraising Methods, Customer Development, Market Validation, and more”.

In Berlin, Germany, the BetaHaus coworking space provides its members with a set of tools, such as a 3D printer, to test new products and designs as well as to rapidly build prototypes.

The Incubators' interest

Some historical players in the innovation and entrepreneurship support industry, office park management companies, business centres, etc., are considering embracing coworking to serve with the requirement of the new generation of workers and creators.

What about the Business and Innovation Centres?

Nowadays, a range of BICs in Europe have been experimenting with coworking models. The North-East of England BIC, Toulon Var Technologies in France and Gategarching BIC in Munich are just a few examples that can be showcased.

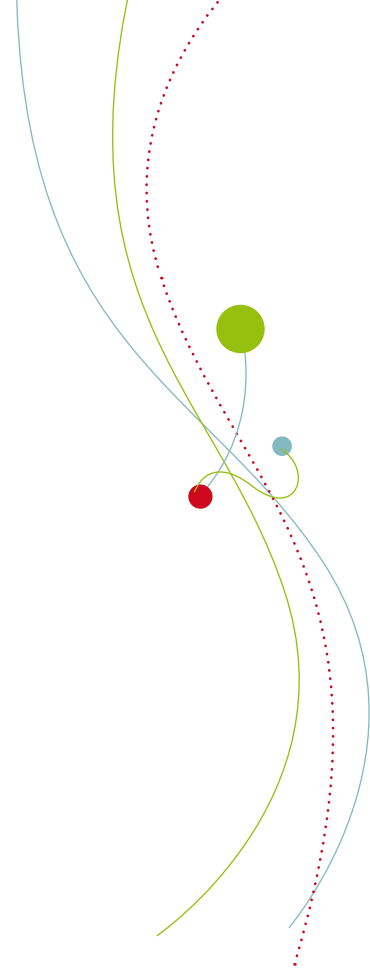


**North-East England BIC,
Sunderland, United Kingdom**

David Howell is the Director of Operations of the North-East of England BIC and when explaining



why the BIC has set up a coworking space he says: “We have had virtual, hot desking, soft landing, etc. facilities for a number of years but I felt we needed to have a dedicated offering for the growing number of “mobile entrepreneurs”. The most important aspect is exposing the clients to the range of support and infrastructure that a BIC can offer so that we can develop their business the same way as we do for companies who are permanently based here. More recently, we have worked with Jayne Graham in developing “Colleagues on Tap” days to develop our understanding of the needs of this emerging client base. We could have just done this ourselves, in isolation, but I was very keen to bring together a regional project so that it gave a greater emphasis and hopefully economies of scale.” When asked about the level of development of the coworking space David explained that “to date we are through to the second stage of Regional Growth Fund (the only project to have the backing of both our Local Enterprise Partnerships) and have an initial ERDF bid in. This would be to fund a coordinated regional approach and establish a recognisable brand across the North East.”



Indeed, once a week, Jayne Graham organises a roaming coworking day called “Colleagues on the Tap”, each time in a different location. “Sometimes – says Jayne - it’s in an Art-Deco cinema, another time, it will be in a business centre, a hotel, an art gallery. There, we set up a pop-up office for the day. We put a big table in place, a proper Wi-Fi connection and we provide the participants with the lunch. They just pay 20 £ for the catering. It’s very powerful. Most of the time, the participants will keep networking after the event. The BIC supplies the physical space. We organise the event”.

“At the beginning, the North East BIC didn’t have an appropriate space to host the day. So, we transformed an existing meeting room into an open space. If a good space design helps, that’s not where all the



benefits of coworking come from. Coworking offers opportunities to collaborate and build communities among the tenants”. This is corroborated by David who states “as we have many networking events on site for our incubatees we see an integration of these and the coworking group to increase and improve collaboration opportunities. We hope that by supporting this new group some may well aspire to expanding their operations, take on new staff etc., and if suitable take space for their growing business”.

When asked about the added value a coworking space will add to the Incubator David replied that “the BIC is no different from any of the businesses we support. We need to move with the needs of the market place and engage with clients on their terms and requirements. The market place and how we interact with clients, new and old, is changing and we have to go with that. By giving them “the BIC experience” we hope to grow a whole new breed of entrepreneurs that we may not have reached in the past and adding value to their business operations”.

“The world – explains Jayne - has changed. Technology allows any freelancer, starter or genuine innovator to work from home with the same level of facility they can get in a regular traditional office. However, isolation is not good either. Anyone needs social contacts and stimulation coming from the outside. The challenge is to build a fluid infrastructure they can use whenever they want, in order to offer a combination of both modes (home and nomad) to the modern individual worker”.



Toulon Var Technologies, Toulon, France

TVT is a Business and Innovation Center based in Toulon, in Southern France, which manages, among other things, two innovation-based incubators. TVT’s office and incubators

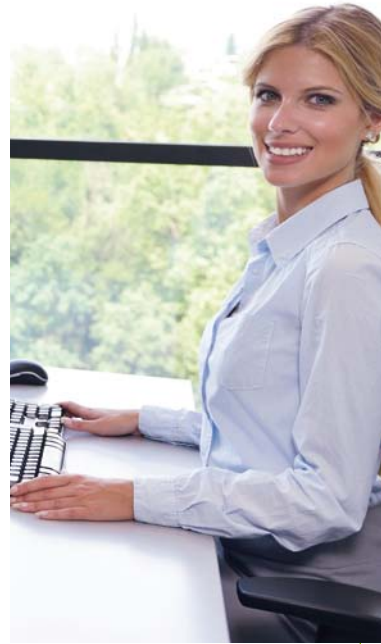
are located right in the centre of Toulon, in a seven storey building called “La Maison des Technologies”. The agency shares the facilities with two engineering schools.

In 2010, TVT opened a 300 sq.m. coworking space at the ground floor level of the building. Soon, the space was integrated within the “La Cantine” network, the largest coworking franchise in France.

“In the beginning, we equipped the room with sofas and curtains. We designed it in a different, more colourful way. We will soon set up movable walls to modulate the space for small events”, says Catherine Fekrane, Prospective Numeric & Economic Intelligence Manager at TVT. “Nowadays, La Cantine Toulon has become both our experimentation box and a real connecting platform for the digital ecosystem in Toulon and beyond”.

For TVT, the coworking space does not single out the other tools and instruments the public agency has been operating with for a number of years. Our incubators allow us to work target by target.”

La Cantine Toulon opens the fields of possibilities and increases the chance of unexpected encounters. “Through the coworking space, we give an opportunity to new ideas and projects we wouldn’t ever have imagined or that we would have put aside due to the lack of defined fast profitability” observes Catherine Fekrane. “The EI conference would have never come to life, for instance”.



La Cantine Toulon increased the visibility of TVT's actions in general. Since the opening of the coworking space, more partnerships have been signed.

“The space has created a sense of ownership for the tenants as well as for outsiders. College teachers, students or people involved in research programs took the opportunity to come frequently in the space. We knew some of them, before. La Cantine, though, being an open and convivial space, created an appropriate environment for more informal, casual connections between people”.

A coworking space needs a number of key ingredients for the alchemy to occur, including information, intelligence, facilitation, event organisation, etc.

“We must raise new ideas and disruptive reflexion in order to raise the interest and trigger an experimentation dynamics. At a further stage, those experimentations and chaotic exchanges will convert into very concrete and valuable projects”.

La Cantine Toulon has hired a part-time facilitator who comes two and a half days a week. Guillaume energises the coworking space. He boosts the visibility and listens to what is happening within and around the space. He knows all the entrepreneurs and innovators and puts people in touch with each other according to what he understands are their needs, what he knows about a new project and an unplanned opportunity.

Why should other BICs adopt the coworking approach? “It's a real added value, observes Catherine Fekrane, if we don't want to die on traditional closed approaches, if we want to boost imagination and creativity in order to nurture more disruptive projects and companies”.

BIC Gategarching, Munich, Germany



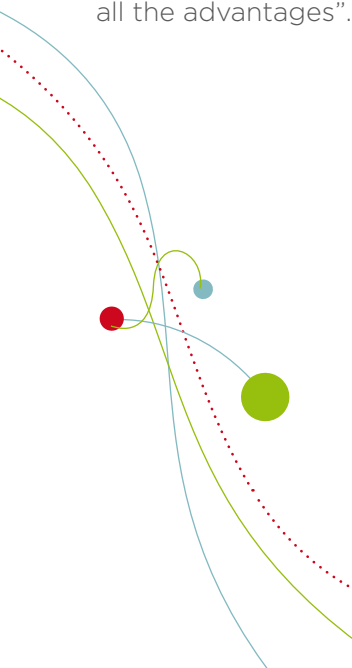
Franz Glatz, the director of BIC Gategarching, in Munich, has opened a coworking space under the BIC umbrella, although it is not located within the incubator's premises.

The coworking space is located in the centre of Munich, served by the best public transport connections and parking facilities. So, the coworking space is not really «in the BIC», being instead promoted «by the BIC». When asked about the reason for opening a

coworking space, Franz said that “ubiquitous working is a very obvious condition of many young urban entrepreneurs. Part of our clients in the field of Digital Media, Games and WebTV actually need no fully-equipped offices or labs next to the university being their office and lab the computer. They can work wherever they want. With our offer we try to reach these very interesting and important entrepreneurs and bind them to the BIC”.

Adding a coworking space makes it possible for the BIC to provide professional support to young would-be entrepreneurs in the idea-development phase, an earlier phase than that of entrepreneurs who require the incubator’s assistance and get in touch with the BIC to obtain support for an idea that has been already clearly identified.

“On the other hand - explains Franz - people start their business in our BIC because they plan to share knowledge and to collaborate with other companies. The reality shows that this often is harder to achieve than we thought, because sometimes the road towards the next office is too “long”. We think a Coworking space lowers the barriers to mutual knowledge sharing within tenants and incubators. We conceive our BIC as a large network of entrepreneurs in which all incubatees can join our supporting offers such as our workshops or coaching sessions with the entrepreneur-in-residence. All members of the coworking space will be, by contract, a host of the BIC and for that a full member of the BIC with all the advantages”.



When asked about what he expects will change for the incubatees in his BIC thanks to the coworking space, Franz replies that “nowadays we have in average 60 companies located at the BIC. Sixty companies have 60 business ideas and experiences to share. We expect that much more individual business ideas will be developed and hosted in the coworking space. So, more ideas will bring more opportunities”.

Franz sees three advantages in opening a coworking space through the BIC. The first is the marketing aspect. “Our BIC developed into a well-known brand within the entrepreneurial ecosystem in the region of Munich and Bavaria. We have our channels to communicate the new offer”. Then there is the trust factor: “people know what they get through our BIC – they know the quality of workshops and of the contacts”. Finally the value chain comes into play: “You can expand the chain of the offers of the BIC closer to the idea creation phase and by support ideas in an earlier phase, the same support becomes much deeper and more efficient, lowering the chances of making mistakes and increasing the sustainability of future companies”.

Conclusions

Philippe Vanrie, CEO, EBN

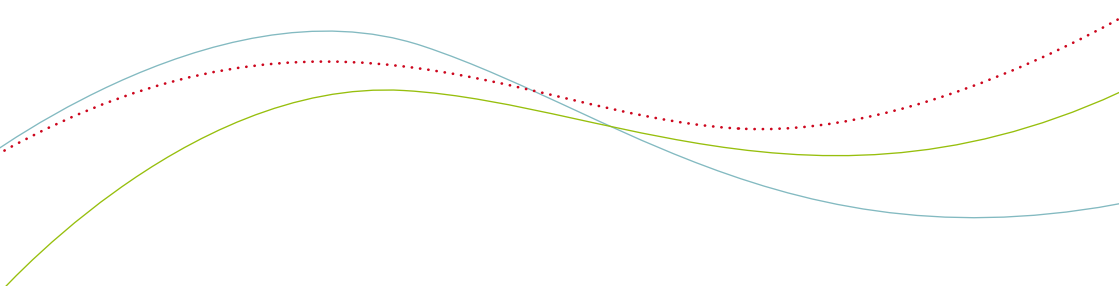
We are in a changing economic environment. We are heading towards an ever more open and collaborative ecosystem. We acknowledge that BICs may draw some inspiration from the coworking model and, why not, integrate some elements of the coworking philosophy in their broader activities. BICs and coworking spaces are different movements, with different principles, often addressing different audiences, and different services, but we definitely have a common denominator. We share common values and objectives. And we all share the aim of supporting the emergence of new economic projects, new innovations, and new companies including individual entrepreneurs.

Part of the added value of coworking spaces is the integration of new modern digital communication techniques, as its usage within coworking movement is quite impressive. Furthermore, some coworking spaces have developed a sharp startup culture tuned with the spirit of a generation of young entrepreneurs.

Although the movement is in its early phase, a growing number BICs are embracing coworking as a component of their offering, in various countries such as Belgium (CEEI Louvain-La-Neuve, Heraclès in Charleroi, Cap Innove in Nivelles, BEP in Namur, WSL in Liège), Luxemburg (Technoport in Esch/Belval), Spain (BIC Euronova in Malaga, CEEI Valencia, CEEI Alava), in France (TVT in Toulon), in UK (NE England BIC in Sunderland), in Germany (Gate Garching in Munich), in Czech Republic (Starcube space in JIC Brno), and many others.

Where can the BIC community start to let some elements of the coworking culture trickle down within their own working model? A first step could be to work on the infrastructure layout. The reflection on the design and organisation of the facilities has already been carried out in depth in a number of BICs. Some players have put meeting and collaborative rooms in place. Nevertheless, some BICs do not include open spaces in their physical architecture.

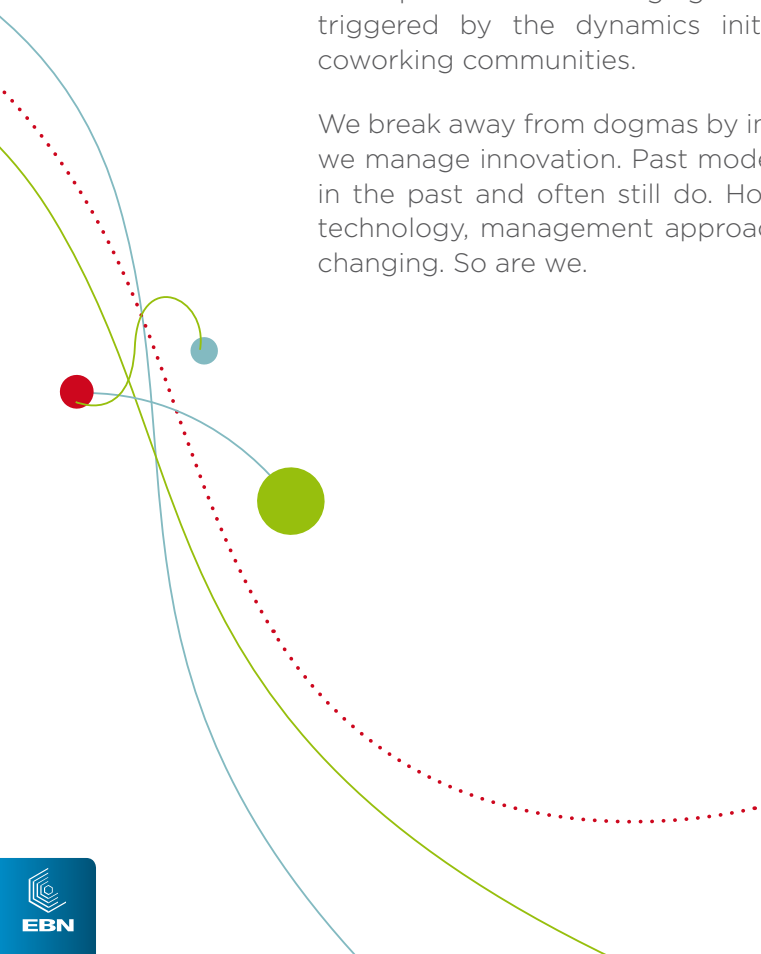
Team spirit, attitude and values are critical to generate a positive atmosphere and a convivial social climate which will improve the opportunities of exchange among people. Indeed, all BICs now animate their tenants through internal events to promote and foster exchanges and business opportunities through, for example, innovative breakfast meetings, evening keynotes, training sessions, success stories showcases, elevator pitches and competitions. This is also, in many cases, already being brought in the outer context, within the entrepreneurial fabric of the regions, out of the incubators' walls, although everything, of course, is always perfectible. Coworking is a practice that can add an interesting layer by facilitating the connections between SMEs and the freelance world while generating the opportunity for starting new ventures.



Furthermore BICs could use the coworking experience to create further added value in their internal and external communities by increasing the culture of permanent “open doors”. This is a mindset concern that does not brush aside the need for efficient business and innovation coaching once a project gets out of the napkin stage and brings to a further layer, the technical one, where the quality of the collaborative dynamics that will emerge relies on the ability of the support team to play a community-builder role.

The community effect will sprout new initiatives and improve the development of the existing projects. In the meantime, the community effect can lead to the creation of new clusters with experts and operators in a specific field. Emerging clusters can partly be triggered by the dynamics initially ignited within coworking communities.

We break away from dogmas by innovating in the way we manage innovation. Past models delivered greatly in the past and often still do. However, again, times, technology, management approaches and values are changing. So are we.



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