Innovation Centres and Business Incubators in Poland in 2014
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1. Innovation Centres and Business Incubators in Poland in 2014

Marzena Mażewska, Anna Tórz

As business support institutions, innovation centres occupy a crucial role in the field of technology transfer and knowledge commercialization, as well as in building the innovative character of Polish economy.

Innovation centres include such institutions as technology parks and incubators, technology transfer centres, and academic business incubators. Business incubators become more and more often involved in stimulating innovation processes.

In the middle of 2014, 176 active innovation centres and business incubators were identified.

Table 1. Number of Innovation Centres and Business Incubators in Poland in 2014

<table>
<thead>
<tr>
<th>Types of centres</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology Parks</td>
<td>42</td>
</tr>
<tr>
<td>Technology Incubators</td>
<td>23</td>
</tr>
<tr>
<td>Academic Business Incubators (Pre-Incubators)</td>
<td>24</td>
</tr>
<tr>
<td>Business Incubators</td>
<td>46</td>
</tr>
<tr>
<td>Technology Transfer Centres</td>
<td>41</td>
</tr>
<tr>
<td>Total</td>
<td>176</td>
</tr>
</tbody>
</table>

Source: own elaboration.

Map 1. Innovation centres and business incubators in Poland in 2014

Source: own elaboration.
Territorial distribution of innovation centres and business incubators is uneven. The majority are located in southern Poland (41%), while 38% are in central Poland and 21% in northern Poland. They can be found in every region of the country Poland, but most of them are located in Śląskie (23), Małopolskie (20), and Dolnośląskie (17).

Table 2. Structure of Innovation Centres by location (%)

<table>
<thead>
<tr>
<th>Location</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural units (NUTS5)</td>
<td>4%</td>
</tr>
<tr>
<td>Towns up to 50,000 of residents as well as urban and rural units (NUTS5)</td>
<td>17%</td>
</tr>
<tr>
<td>Medium-sized towns 50,000–300,000 residents</td>
<td>41%</td>
</tr>
<tr>
<td>Large cities 300,000–800,000 residents</td>
<td>30%</td>
</tr>
<tr>
<td>Agglomerations over 800,000 residents</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: own elaboration.

On average, there are 218,939 citizens per every centre – from 1,060,362 in Mazowieckie to 113,700 in Lubuskie. The number of companies per centre has increased by a third (12,800 companies in 2011 and 20,854 in 2013) as compared to 2011. However, the analysis of active companies proves that a high number of companies does not find its reflection in the number of innovation centres and business incubators. The managing institutions of the surveyed centres are often active in other fields, not necessarily innovation-related. These include business or social economy. In 137 managing institutions, there are 256 innovation and business centres (1.87 centre per institution), 176 of which are innovation centres and business incubators.

The analysis shows that 53% of managing institutions incorporate one centre only, while the remaining 47% manage from 2 to 7 centres.

Innovation centres and business incubators are relatively new institutions (up to 10 years old), though entities funded in the 90s constitute around 20%.

Innovation centres are mainly limited liability companies (27%) and university entities (24%), but they also include joint-stock companies and budgetary units of regional councils. Local and regional governments play an increasing part in creation of business support infrastructure by establishing companies and budgetary units of regional councils (16%).

Technology and research potential of Polish innovation centres has significantly increased thanks to numerous infrastructure investments and specialized laboratory and research equipment. Between 2007 and 2013, many innovation centres availed themselves of European Union funds to improve their potential.

Centres offer mainly advisory services and training courses in creating and managing a company. However, innovation-related services are becoming more and more popular. Over 44% of centres offer assistance in writing grant applications, while 42% declare cooperation with local loan funds. The remaining centres have links with business angels and venture capital funds.

Around 25% of the centres take part in a variety of clustering initiatives. Centres frequently stimulate clustering. Most centres are involved in clusters within the ICT and power industry sectors.

The centres mostly collaborate with universities, while their least popular partners are financial institutions. Some of the centres are members of trade associations, while 43 actively participate in the domestic networks, and 23 in the international ones.
Innovation centres are an important component of business support infrastructure in Poland. Their potential enables them to provide entrepreneurs with diverse services, which facilitate technological and organizational development of their companies.
2. Technology Parks (TP)

M. Mażewska, A. Bąkowski, A. Tórz, J. Holub-Iwan

In the middle of 2014, 42 technology parks were identified in Poland. Technology parks are located in all 16 regions. Most of them are in Wielkopolskie (6), Śląskie (6) and Dolnosląskie (5).

Half of the parks are located in small and average-sized cities, while a third of them are concentrated in large metropolitan areas. The survey revealed that technology parks can function only where social and economic potential of the area creates enough demand for the park’s offer to be absorbed.

Although the first park was founded in 1995, the majority of parks in Poland are relatively new institutions; over 80% of them were founded after 2004.

The majority of surveyed parks have legal status of joint-stock companies (24%) and limited liability companies (45%), while some of them are budgetary units created by the regional councils (24%).

Only 58% of those functioning as limited liability companies have their own budget, which means that 12% are units of companies having a broader scope of activity. Over 21% of TP are legal entities dedicated only to functionalities of technology park, while 79% are sharing their activities and resources with 1 to 5 other business and innovation centre operating within the managing institution.

1 33 parks were surveyed.
All the TP surveyed have at their disposal over 373 654 m$^2$ in total, which means that the average size of park is 10 890 m$^2$. Polish parks vary in their physical size. Some of them have almost 60 000 m$^2$, while others have barely over 1 500 m$^2$.

Rental space is on average 4 919 m$^2$, ranging from 600 to 19758 m$^2$. Over 52% of the parks had in-house laboratories offering services, while 51% provide access to laboratory space for rent.

As regards human resources, the average TP employs 26 persons. A third of parks have staff ranging from 10 to 19, while a fourth employ from 20 to 49 people. Only 10% had more than 50 employees. The smallest park employs 3 persons.

The majority of parks (58%) made investments in fixed assets in 2013. The average level of investment was PLN 12.06 million (EUR 2 871 428 57) per park.

The average operating budget was PLN 7 191 612 (EUR 1 712 288.57). The main source of TP income were revenues from the park’s own activities (48%), projects and grants (38%), and donations/subventions (14%).

By the end of 2013, the TPs covered by the survey had 1109 tenants, 755 of which were microenterprises. Technology-based companies constitute 45% of the tenants. There are currently 81 spin-offs and 28 spinouts located in the parks. 7% of the tenants are companies with foreign capital.

Technology parks provide companies with consulting and training services in many fields. Since many parks run incubation programmes, the most popular types of services offered were: entrepreneurship and enterprise creation (82%), as well as business planning (79%).

**Fig. 2. Tenants of technology parks**

<table>
<thead>
<tr>
<th>Category</th>
<th>Tenants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micro</td>
<td>755</td>
</tr>
<tr>
<td>including technology</td>
<td>310</td>
</tr>
<tr>
<td>Small</td>
<td>218</td>
</tr>
<tr>
<td>including technology</td>
<td>139</td>
</tr>
<tr>
<td>Medium-sized</td>
<td>91</td>
</tr>
<tr>
<td>including technology</td>
<td>39</td>
</tr>
<tr>
<td>Large</td>
<td>45</td>
</tr>
<tr>
<td>including technology</td>
<td>13</td>
</tr>
</tbody>
</table>

*Source: own elaboration.*

Type of key services for technology commercialization provided by TPs were shown on Fig. 2. Services related to selecting innovative ideas were provided by 55% of technology parks, while 48% of them aided in establishing the contact between technology provider and user by 48%.
Parks offer entrepreneurs their assistance in funds raising and support support in access to capital provided by business angels (44%) and local loan funds (39%).

The services are provided either by the TP team exclusively (36%), in cooperation with external experts and companies (58%), or exclusively by external service providers (6%).

**Fig. 3. Technology commercialization services provided by the Technology Parks (%)**

<table>
<thead>
<tr>
<th>Service</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultation and selection of innovation ideas</td>
<td>55%</td>
</tr>
<tr>
<td>Assistance in cooperation with tech. provider</td>
<td>48%</td>
</tr>
<tr>
<td>Internationalisation</td>
<td>39%</td>
</tr>
<tr>
<td>IPR advisory</td>
<td>39%</td>
</tr>
<tr>
<td>Technology offer or inquiry</td>
<td>39%</td>
</tr>
<tr>
<td>Market analysis</td>
<td>36%</td>
</tr>
<tr>
<td>Advisory assistance in tech. implementation</td>
<td>30%</td>
</tr>
<tr>
<td>Technology audit</td>
<td>30%</td>
</tr>
<tr>
<td>Development of a tech. implementation plan</td>
<td>30%</td>
</tr>
<tr>
<td>Assistance in developing a prototype</td>
<td>21%</td>
</tr>
<tr>
<td>Assistance in negotiations</td>
<td>21%</td>
</tr>
<tr>
<td>Technologies research for companies</td>
<td>18%</td>
</tr>
<tr>
<td>Monitoring of tech. implementation</td>
<td>18%</td>
</tr>
<tr>
<td>Technology evaluation for companies</td>
<td>15%</td>
</tr>
<tr>
<td>Defining the subject of transfer</td>
<td>12%</td>
</tr>
<tr>
<td>Market testing</td>
<td>9%</td>
</tr>
<tr>
<td>Certification</td>
<td>6%</td>
</tr>
</tbody>
</table>

*Source: own elaboration.*

Collaboration with universities has the biggest impact on parks’ day-to-day functioning, as they can benefit from access to experts and infrastructure. It also allows the personnel to acquaint themselves with new technologies and research results. From local governments parks procure specialists and project partnership.

Parks collaborate mainly on local level and to a lesser extent on a national one. The most intensive cooperation on the level of the European Union is established with companies and innovation and business centres (30.3%). 57.6% of the parks are members of clusters, while 21.2% are their coordinators. 9.1% are members of technology platforms, 21.2% have joined trade associations, while others actively network with business support institutions in Poland (21.2%) and abroad (27.3%).
3. Technology Incubators (TI)

Anna Tórz

In the middle of 2014, 23 technology incubators were identified in Poland. These centres and their programmes were created to incubate new economic entities with technology potential. Technology incubators are located in 10 regions. Most of them are in Podkarpackie (5) and Pomorskie (4).

Map 3. Technology incubators in Poland

The incubator\(^2\) managing institutions have different legal status (Fig. 4). They are mainly limited liability companies (36%) and joint-stock companies (27%). Over 14% have status of budgetary units created by the regional councils.

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\(^2\) 12 TI were surveyed.
Over 17% of TI are legal entities dedicated only to functionalities of incubator, while 83% operate within the managing institution sharing their activities and resources with 1 to 4 additional innovation centers.

TI surveyed have at their disposal over 43 100 m² in total. A statistical incubator has 2 855 m² of space, 73% of which is for rent.

Regarding human resources, some incubators have a small staff ranging from 1 to 3 employees while others employ from 20 to 35 people. It is clear that there are two models of TI management. The first one is concentrating on property management and offering external support services, while the second one is focusing on development of potential for in-house services.

Operational budgets of TI are ranging from PLN 100 000 (EUR 23 809.52) to PLN 30 m. (EUR 7 142 857.14) with the median between PLN 1 and 2 m. (app. EUR 330 000). The main source of TI income are revenues from own activities (49%), projects and grants (34%) and donations/subventions (17%). It should be noted that 67% of TIs are operating within the budget of managing institution.
By the end of 2013, the TIs covered by the survey had 334 tenants (with 1761 employees), 222 of which (66.5%) were technology firms. Over 80% of the tenants were micro-companies, while small companies constituted 13%. Newly established companies constituted 18% of tenants, while 58% were incubated companies with preferential rents (cf. fig. 3). The number of companies located in the incubators has significantly increased since 2011. However, the number of new companies located in the TIs has declined. This may be caused by the fact that in 2013 majority of tenants (63%) were the companies in at least their second year of incubation and TIs had simply no free space to offer.

An average tenant graduates after three years, yet there are centers which allow a five-year incubation.

For many years, TIs have extended the scope of assistance. The package includes trainings and advisory services. 92% offer advice on the available European funds, 83% - on entrepreneurship and setting up a new company, while 75% provide assistance in the development of business plan and business model. Approx. 75% of incubators offer support in the form of access to the financial instruments.

The services are provided either by the incubator team, or in cooperation with consulting companies (67%), as well as by the team supported by external experts (33%). These statistics prove active involvement of external subjects in provision of the key services. This results from the frequently limited number of staff. In 2013, TIs delivered more than 1000 services, 30% of which were pro-innovative. They also trained 1 600 people.

The managers of TIs estimate that 1 300 companies have been founded with their assistance, while 60 were established in 2013. These numbers cover only those entrepreneurs, who decided to locate their business in incubator.

More and more frequently, incubators belong to domestic networks of business support institutions (e.g. Polish Business and Innovation Centers Association), and become involved in active clustering. They are also members of trade associations. Technology incubators collaborate mainly with companies, both in Poland and internationally. Their second most popular partners are other innovation centres. When it comes to financial institutions, the incubator activity is limited to Polish entities.
4. Technology Transfer Centres (TTC)

Aleksander Bąkowski

TTC are organisations established to support entrepreneurship and commercialisation of research results. They are units appointed by universities or institutes of the Polish Academy of Sciences, or affiliated to these organisations.

Map 4. Technology Transfer Centres in Poland

Source: own elaboration.

There were 41 TTC operating in Poland in the mid of 2014. All of them were located in the cities where universities can be found. Most of them were in Małopolskie (5), Lubelskie (4) and Łódzkie (4). They served 9.6% of all universities (453) in Poland and almost all of them were located at public universities.

Vast majority of TTCs operate as organisational units within university (83%), while others have legal form of limited liability companies (10%), or foundations (7%).

Almost 45% of surveyed TTCs are sharing their activities with other business and innovation centres functioning within the managing organisation, such as academic business incubators (34.2%), technology parks (7.9%), business incubators (2.6%).

All TTC surveyed have a combination of infrastructure consisting of: office space (93.8%), conference rooms (87.5%), consultation rooms (62.5%), and exposition space (87.5%). A statistical CTT is 697 m².

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16 TTC were surveyed.
As for human resources, the average CTT employs 8.4 persons. However, substantial differences were observed, as the number of employees is ranging from 2 to 23 persons.

On average, each TTC has an annual budget of PLN 1 156 250 (EUR 275 297) ranging from EUR 5 476 19 to EUR 1 309 523.81. The main source of CTT income are donations/subventions (50%), projects and grants (41%), revenues from own activities (8%). It should be noted that most of the TTCs were operating within the budget of their managing institutions (62.5%) (i.e. had no dedicated budget).

**Fig. 6. TTC budget structure (%)**

![TTC budget structure](image)

*Source: own elaboration.*

**Fig. 7. TTC customers structure (%)**

![TTC customers structure](image)

*Source: own elaboration.*
The main aim of TTCs is exploitation and commercialisation of intellectual potential or research entities. Therefore, the majority of CTT customers were researchers (56.3%) and other academic staff (6.8%). Second group constitutes of managers and owners of SMEs (16.9%).

TTCs provided consultancy and training services, which are in line with their mission: development of a business plan and business model (60%), technology and patent-related issues (53.3%), enterprise and establishing new companies (46.7%), access to the EU funds (46.7%). Market analysis and marketing consulting services are provided by 26.7% of the TTCs.

**Fig. 8. Services provided by TTCs (%)**

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business plan development</td>
<td>60.0%</td>
</tr>
<tr>
<td>Technology and patent</td>
<td>53.3%</td>
</tr>
<tr>
<td>Entrepreneurship and starting up a business</td>
<td>46.7%</td>
</tr>
<tr>
<td>EU funds</td>
<td>46.7%</td>
</tr>
<tr>
<td>New products implementation</td>
<td>40.0%</td>
</tr>
<tr>
<td>Cooperation intermediation</td>
<td>40.0%</td>
</tr>
<tr>
<td>Legal</td>
<td>33.3%</td>
</tr>
<tr>
<td>Market research</td>
<td>26.7%</td>
</tr>
<tr>
<td>Business management</td>
<td>20.0%</td>
</tr>
<tr>
<td>Finance and taxes</td>
<td>20.0%</td>
</tr>
</tbody>
</table>

Source: own elaboration.

TTC also assisted in getting access to capital from: seed funds (40%), business angels (40%), grants (33.3%), venture capital funds (26.7%) and loan funds (6.7%).

Services are provided in conformity with regulations of the managing institutions. Regulations on copyright laws and industrial property rights were applied by 93.3% of the CTTs, while 67.7% act in accordance with special procedures.

The customers of 73.3% of TTC have access to both in-house and externally sourced services, while the remaining 26.7% offer services provided by their own personnel exclusively.

The results achieved by TTCs surveyed are incredibly diversified. TTCs managers estimated that 149 technologies of PLN 15 872 000 (EUR 3,779,047.62) value had been commercialised with their assistance, 54 licenses sold and 234 RP, and 36 EPO patent application submitted. In addition, they successfully supported implementation of 151 technologies by industrial partners and 5 capital inputs.

TTC readily collaborate with partners located in the same region. 75% of the centres cooperate with companies, 68.8% collaborate with universities, 37.5% with research institutes, 43.8% with other business support institutions, 31.3% with loan funds and guarantee funds, while 37.5% with capital funds; and finally, 37.5% are involved in cluster activities.
5. Academic Business Incubators (ABI)

Marek Tomaszewski

In the middle of 2014, 24 academic business incubators (ABI) were identified in Poland. Academic incubators are located in 12 regions. Most of them are in Dolnośląskie (5), Małopolskie (3) and Zachodniopomorskie (3).

Map 5. Academic Business Incubators in Poland

Location of academic business incubators is related to the presence of universities. Therefore, 80% were located in cities of 300,000 to 800,000 citizens, while the remaining 20% operate in places where the population is between 50,000 and 300,000.

The vast majority of academic business incubators are university units (60%), though there are also associations (10%), limited liability companies (20%) and joint-stock companies (10%). 60% of them is under university governance, while the remaining 40% falls under the responsibility of the director or management board of their managing institution. All business incubators covered by the survey were established between 2005 and 2010.

Almost 66.6% of academic business incubators are sharing their activities with other business and innovation centres operating within the managing organization, such as technology transfer centres (58.3%), technology incubators (16.7%), technology parks (16.7%), and seed capital funds (12.5%).

* 10 ABI were surveyed.
A statistical ABI was 266.5 m² in floor area. The ABIs surveyed have a combination of infrastructure consisting of: office space, conference rooms, consultation rooms, and exposition space. In addition 40% of ABI had “open space” floor for rent at their disposal.

When it comes to human resources, the average ABI employs 6.1 persons. However, the vast majority of surveyed incubators (80%) employs from 1 to 4 persons (FTE). Employees of 60% of ABIs focus exclusively on its operations, while others divide their work with other activities. On average, in such cases, they devoted 50% of their time to the business incubator, and 50% to other activities within the university.

An annual operational budget of ABI is ranging from below PLN 50 000 (EUR 11 904.76) to above PLN 500 000 (EUR 119 047.62) with a median between PLN 50 000 (EUR 11 904.76) and PLN 150 000 (EUR 35 714.29). The main source of income are donations/subventions from managing institution, grants and projects and revenues from space rent and registration and exploitation fees. Majority of ABI (80%) have revenues related to one source of income. While there were cases with 100% costs covered by donations from the managing institution, the budget of others is entirely based on the revenues from space renting and fees.

**Fig. 9. Structure of ABI customers in 2011 and 2013 (%)**

![Fig. 9. Structure of ABI customers in 2011 and 2013 (%)](image)

*Source: own elaboration.*

The majority of ABIs were students (44.4%) and graduates (20.6%). As regards services, ABIs most frequently offered support for pre-incubation projects (53.2%), early incubation (30.4%), and late incubation (13%). This structure is relevant to the ABI mission. Mentoring and coaching were provided by 80% of surveyed ABIs.

The survey revealed that 50% of incubators supported their clients with services provided by external service providers, while others offer in-house services only.
The research shows that the majority of incubators provide their clients with consulting services in the field of: business planning, forming a company, as well as business management, and legal, financial and tax issues. They also organize training courses in market analysis and marketing. An average incubator runs 14 training courses, attended by 168 people in total. Each course was attended on average by 12 people. The range of consulting services was diverse. Some of the respondents organized 600 or even 782 advisory meetings, while others set up only two. The average number of such sessions per institution is 120, while the average number of participants is 187.

ABI have from 3 to 35 tenants. ABI managers estimated that 532 companies graduated from incubator while 11 businesses were created in 2013. Half of incubators assisted the creation of spin-offs and spin-outs. On average, 2 spin-offs and 7.4 spin-outs emerged from every incubator.

ABI readily collaborate with partners located in the same region. All surveyed centres were cooperating with companies, 80% with universities and 70% with business support institutions. However, concentration on local cooperation creates relatively weak conditions for development of innovation projects.
6. Business Incubators (BI)

Marzena Mażewska

Business incubators are the oldest business support institutions in Poland. In the middle of 2014, 46 such centres were identified. Business incubators are located in 15 regions. Most of them are in Śląskie (10) and Małopolskie (5).

Map 6. Business Incubators Poland

The incubators’s managing institutions have different legal status (Fig. 11.). They operated mainly as non-governmental organizations, such as associations (14%) and foundations (37%), but also as commercial companies, such as joint stock companies (21%) and limited liability companies (7%). Over 21% had status of budgetary units created by regional councils.

\(^{5}\) 14 BI were surveyed.
About 33% of BI are entities dedicated only to functionalities of incubator, while 67% share their activities and resources with 1 to 5 additional business and innovation centres.

A statistical incubator is 6 127 m² in space, 60% of which is for rent, while floor area is 4 065 m². Incubator’s own office space is the average of 282 m², while rental space is 2 447 m². Three incubators offer a mix of workshop space, pattern rooms and prototype rooms (the average space of 556 m²).

When it comes to human resources, there were an average of 9 full time employees in incubator and 8.9 employees with civil law contracts by the end of 2013. Some incubators had small staff ranging from 1 to 3 employees, while others from 30-34 employees.

As for the operation costs, the lowest budget in 2013 was PLN 45 740 (EUR 10 890.48), while the highest was PLN 4.9 million (EUR 1 166 666). This means that the average budget of incubator was PLN 1 269 430 (EUR 302 245). The main source of revenues are rental fees and charges for the provision of services.

Clients of business incubators are both their tenants and entrepreneurs who make use of their consulting and training services. In the end of 2013, there were 297 entities located in incubators. 80% of them were micro companies, 15% were small companies, 4% were medium ones and 1% were large companies. In comparison with the previous study, the number of micro companies declined by 9%, while the number of small companies increased by 6%. Also, while absent in 2011, medium companies have emerged. A statistical incubator had 22 tenants. Each incubated company had an average staff of 6 people. 44% of business incubator tenants were innovative companies, while very few were foreign capital companies (3%). Spin-offs and spin-outs constituted 2% of the tenants.

In 2013, 69 companies were established, 29 of which were owned by women. On average, every business incubator had 10 new companies. In 2013, tenant companies created 403 jobs. 46 companies left the incubators, 26% of which graduated, while 67% were forced to close down, or were in debt.

The core activity of incubators is the provision of space and a variety of consulting and training services. Almost all business incubators assist entrepreneurs in the creation of a new company. However, the more specialized services needed, the less willing incubators are to provide them. The research suggests that 43% of incubators have developed training services. Clients can also get assistance in raising funds. Only one business incubator does not have any financial instruments to offer.
The rental of space in 93% of incubators is in accordance with regulations and/or admission criteria. Since 2011, the results have improved by 20%. Most incubators (79%) impose limits on the length of time enterprises can remain their tenants. In most cases, the exit rules require tenant to leave after 3 to 5 years. One of the incubators obligates its tenants to “graduate” after 1 year.

About 12% of services provided by business incubators were innovation-oriented. 1580 people participated in training courses, which means that the average number of people trained by each incubator is 263.

Cooperation among business support institutions in the age of globalization is becoming more and more important. Over 30% of business incubators are members of clusters, and one of them is a cluster-coordinator.

Incubators covered by the research collaborate most closely with local authorities and financial institutions. The respondents claim they derive most satisfaction from cooperation with universities and local government units. Essentially, incubators ensure a very limited level of cooperation which now secures only their everyday needs.