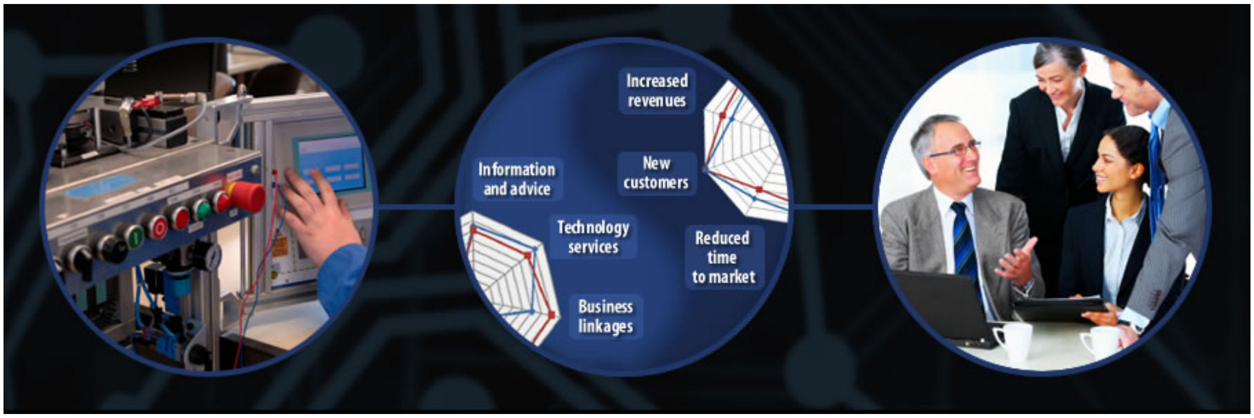


An Assessment of the Impact of UCLA's Global Access Program (GAP) on Finnish Companies supported by Tekes 2010-2011

Provided by
The Evidence Network
www.theevidencenetwork.com

11 June 2012

THE EVIDENCE NETWORK
Measuring Innovation Impact

172 Greenfield Avenue
Ottawa ON K1S 0Y1
barge@theevidencenetwork.com
613-695-1981

The Evidence Network has conducted an in-depth examination of the impact of Tekes-GAP on companies participating during 2010 and 2011.

Some conclusions stand out:

1. **On the importance of GAP offerings: Ninety percent of the companies considered Primary research and Interpretation and analysis of research findings to be either 'very important' or 'extremely important'.**

2. **On the Immediate Impact of GAP: GAP is achieving immediate impact on strengthening the resources and capabilities of companies, especially through the provision of Strategic business information and information on Selling into new markets.**

3. **On the Intermediate Impact of GAP: GAP achieves longer-term impact on the market performance of participating companies on all assessment dimensions. The top three average impact results are for New international customers, Change in number of employees, and Export sales revenue.**

4. **On Value and Recommendations: Seventy-six percent of all companies found value relative to cost to be high or very high. Ninety-five percent had recommended or planned to recommend GAP to others.**

Table of Contents

Table of Contents 3

Executive Summary 4

Introduction 6

TEN's Impact Assessment Methodology 7

Global Access Program: Client Companies 10

GAP's Client Companies 10

Company Performance 13

Value of GAP 16

Global Access Program: Importance of Offerings 17

Summary of the Importance of Offerings 17

Detailed Importance of Offerings Results 18

Global Access Program: Immediate Impact 21

Summary of Immediate Impact 21

Detailed Immediate Impact Results 22

Global Access Program: Intermediate Impact 28

Summary of Intermediate Impact 28

Detailed Intermediate Impact Results 29

Conclusions 35

Appendix A: Description of Sample 37

Appendix B: Examples of Questions 38

Importance of Offerings 38

Immediate Impact 39

Intermediate Impact 40

Appendix C: Segmented Immediate Impact Scores 41

Appendix D: Segmented Intermediate Impact Scores 47

Appendix E: The Evidence Network Principals 53

Executive Summary

This document provides an assessment of the performance of Tekes' Global Access Program (hereafter "GAP") conducted by The Evidence Network (TEN), an independent, third party company that specializes in measurement of the impact of innovation intermediaries.

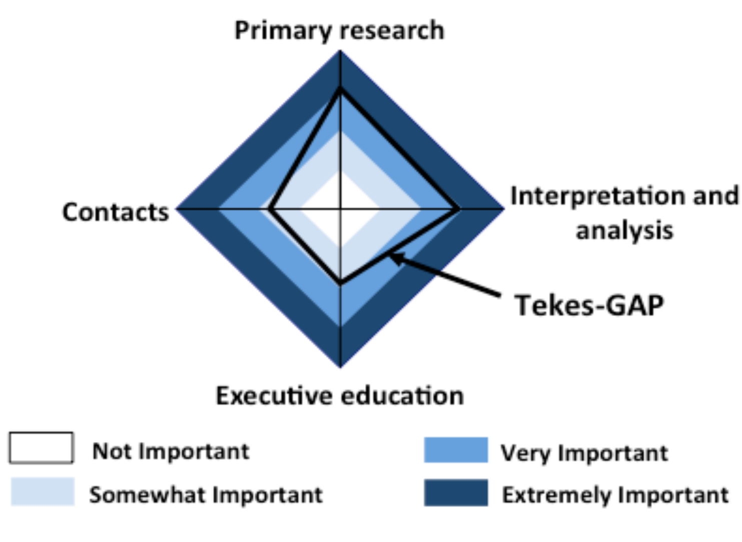
TEN measures the immediate and intermediate impact of innovation intermediaries. By measuring immediate impact, TEN provides intermediary managers, boards of directors, and funding agents with knowledge of the impact of intermediary services on the resources and capabilities of their client or member companies. By measuring intermediate impact, TEN provides evidence of GAP's impact on the performance of companies in the market.

The present document reports on the impact of GAP on companies that participated in 2010 and 2011, based on the responses of 21 companies to a customized web-based survey conducted during May 2012. An earlier impact assessment by TEN, presented to Tekes in 2010, covered the impact on companies that participated in GAP between 2005 and 2009, inclusive. TEN will also provide Tekes with additional analyses that compare the results of the two studies, examine the factors that predict impact on company performance, and estimate the impact of GAP on Finnish GDP and employment.

Our analysis of surveyed companies can be summarized as follows:

1. ***Client Companies:*** The companies accessing GAP operate in a broad range of sectors, with the majority of responding companies in the Information and communications technologies sector (57%). The largest group of companies has revenues of more than €5 million (48%), although most responding companies have less than 50 employees (62%). 63% of the companies were founded after the year 2000.

2. ***Importance of Offerings:*** The GAP service offerings of Primary research and Interpretation and analysis of research findings ranked highest: Ninety percent of the companies considered these to be either 'very important' or 'extremely important'.



Average Importance of Outputs of the Global Access Program

3. ***Immediate Impact:*** GAP achieves immediate impact on participating companies. On average, GAP's Strategic business information and advice, Information and advice on selling into new markets, Feedback on company products and services, and Information or advice on operating in new markets either achieved or bordered on achieving 'significant' immediate impact. For these four measures, the percentage of companies that reported 'significant' or 'very significant' impact was 67%, 62%, 34% and 34%, respectively.

4. ***Intermediate Impact:*** GAP also achieves longer-term impact on the market performance of participating companies. GAP is achieving 'some impact' for all assessment dimensions. The top three average impact results are for New international customers, Change in number of employees, and Export sales revenue measures. For these three measures, the percentage of companies that reported 'some impact' or greater was 77%, 57%, and 57%, respectively.

5. ***Comparing Immediate and Intermediate Impact:*** The immediate impact of GAP ranks higher than the intermediate impact. This is understandable because services provided by innovation intermediaries have a direct and immediate impact on the resources and capabilities of client companies, while intermediate impacts will take place in the longer term. In addition, intermediate impact in the longer term is more difficult to attribute to innovation intermediary activities , the impact of which are diluted as they are combined with other factors.

6. ***Value of GAP:*** Seventy-six percent of all companies found value relative to cost to be high or very high. Ninety-five percent had recommended or planned to recommend GAP to others.

Our findings on the impacts being achieved by GAP are encouraging and important. A broad range of companies from many sectors attribute GAP with positive impact on their resources and capacities, as well as on their market performance. For example, the finding that the vast majority (over three quarters of the companies surveyed) report that GAP had some or more impact on their acquisition of new international customers, indicates the tangible impact of GAP on company performance.

Introduction

In a report submitted to Tekes in 2010, TEN provided an independent third-party assessment of the impact of the Global Access Program (GAP) for the period 2005 to 2009. This report follows the earlier work, providing an independent, third-party assessment of the impact of GAP on companies that participated in the program in 2010 and 2011. Additional analyses that compare the results of the two studies, examine the factors that predict impact on company performance, and estimate the impact of GAP on Finnish GDP and employment, will be provided to Tekes in July 2012.

GAP is offered to non-US firms by the Anderson School of Management at the University of California at Los Angeles (UCLA). The GAP works with foreign organizations throughout the world to assist their technology companies in developing global strategies. With the help of Tekes funding, over 130 Finnish companies have participated in GAP since 1999.

GAP is designed to provide low cost management consulting services to non-US companies seeking strategic advice. An educational program, GAP matches a team of students from the fully-employed MBA program with participating companies to develop business strategies that enable the companies to move to the next stage of corporate development.

Tekes is the Finnish funding agency for technology and innovation in Finland. Every year, Tekes finances some 1,500 business-related research and development projects, and almost 600 public research projects at universities, research institutes, and polytechnics. Research, development and innovation funding is targeted to projects that create the greatest long-term benefits for the economy and society.

To assess the impact of GAP on companies, TEN developed a customized questionnaire based upon TEN's proprietary impact assessment methodology. On May 3rd, 2012, an e-mail was sent by the Tekes Advisor responsible for GAP, Minh Lam, inviting the 29 client companies that had participated in GAP in 2010(14) and 2011(15), to participate in a web-based survey. After one reminder email message and follow-up telephone calls, 21 respondents from the client companies responded to the survey for a response rate of 72%. Further data on the response profile of the GAP clients is provided in Appendix A.

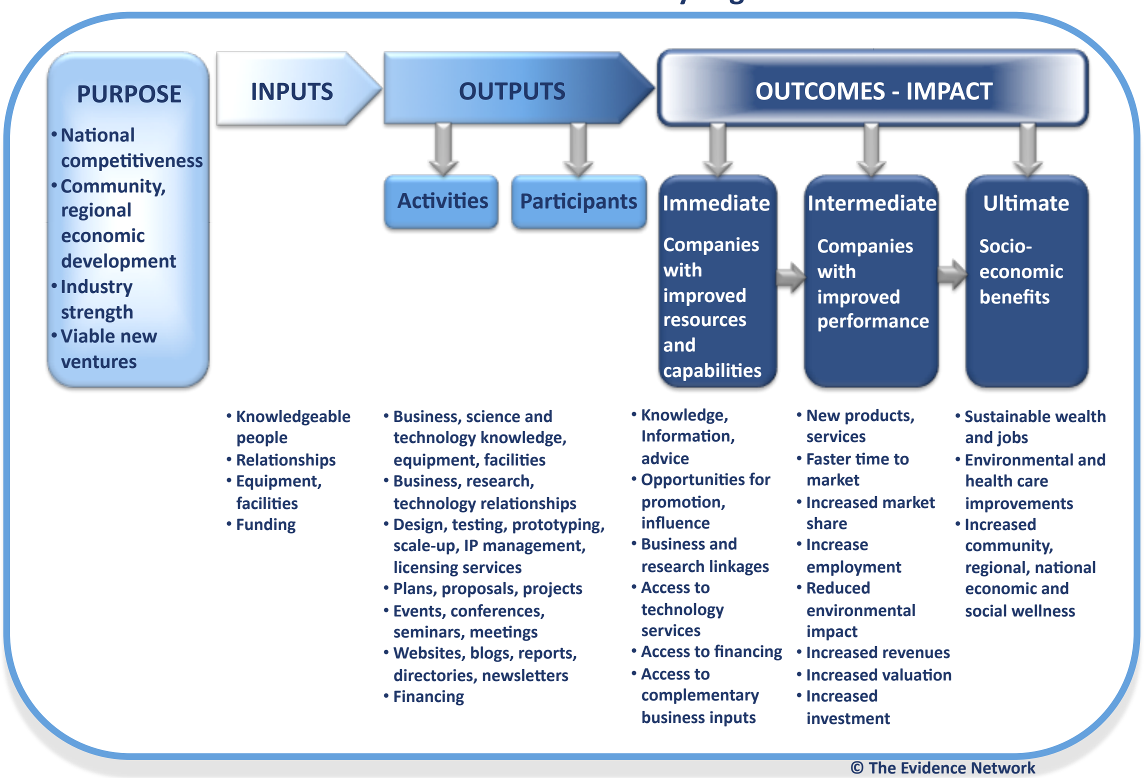
The next section of this report describes TEN's impact assessment methodology, which was used to guide the selection of impact assessment measures, and to interpret the survey results. We then provide information on the client companies in the sample. In the sections that follow, we provide analyses of the importance of GAP's service offerings, and of the immediate and intermediate impacts. In the final section we conclude. Appendices provide details on the response profiles of companies, examples of questions, detailed immediate and intermediate impact results, and information on TEN.

TEN's Impact Assessment Methodology

TEN's approach to measuring innovation impact is based on the premise that innovation intermediaries can be described as an overarching class of organizations whose members share common goals. Despite their diversity, innovation intermediaries, ranging from small economic development organizations to large and sophisticated research institutes, seek to make their member or client companies more innovative, in the interests of facilitating increases in their viability, profitability, or other manifestations of their success.

The logic model shown below illustrates how innovation intermediaries work to fulfill their missions, and how TEN measures their impact. As shown at the top-left of the diagram, innovation intermediaries express their purpose in terms of national competitiveness, regional economic development, industry strength, or viable new ventures, and conduct activities to achieve immediate and intermediate impacts on the companies that are their members or clients, and long-term impacts in the form of socio-economic benefits. The immediate impacts of innovation intermediaries are improvements in the resources or capabilities of client or member companies, intermediate impacts are improvements in the performance of client or member companies, and long-term impacts affect communities, industries, economies, societies, and the environment.

TEN's Innovation Intermediary Logic Model



Working backwards, from right to left, the logic model shows *how* different types of impact are achieved. The achievement of long-term impact depends on the achievement of intermediate impact, which in turn depends on the achievement of immediate impact. So, for example, an innovation intermediary that seeks to create economic growth in a region (its purpose and desired long-term impact) does so by facilitating improvements in the performance of local companies (its desired intermediate impact), either by facilitating company growth or the creation of new ventures, or by attracting new companies to the region. It facilitates company growth and the creation of new ventures by facilitating improvements in the resources and capabilities of local companies (its desired immediate impact). The fundamental logic is that innovation intermediaries achieve their desired intermediate and long-term impacts by affecting the resources and capabilities of the companies with which they work.

TEN measures the intensity of use of intermediary service offerings, and the immediate and intermediate impacts of innovation intermediaries. By measuring immediate impact TEN provides intermediary managers, boards of directors, and funders with timely feedback on the suitability and effectiveness of intermediary services. Note that we measure immediate impact by asking about the *impact* of intermediary services on specific company resources and capabilities, not by asking about *satisfaction* with intermediary services, as a customer satisfaction survey would do. While clients may be satisfied with an intermediary's networking event, the event may or may not have had an impact on their ability to find, for example, new suppliers.

By measuring intermediate impact, TEN provides management, investors, and other stakeholders with evidence of the effect of intermediary services on company performance in terms of new product and services, employment, or revenues, etc. Measuring intermediate impact is important because it corresponds to the missions of intermediaries and provides the hard evidence of results that stakeholders seek. But company performance depends on a number of factors and so to assess intermediate impact we consider both the change in company performance and the degree to which the change is attributable to the intermediary. For example, to determine the impact of a research institute on the revenues of client companies, we ask about both changes in revenues and the degree to which those changes are attributable to the services of the research institute.

Innovation intermediaries hope to have long-term impacts that correspond to their missions. But the measurement of long-term impact is difficult because changes in the economy, the environment, or society are brought about by the collective actions of many players. So it is difficult to attribute such changes to the activities of a single organization. But as long-term impact is facilitated by the achievement of intermediate impact, evidence of intermediate impact is suggestive of possible long-term effects.

TEN's logic model expresses the expectation that outputs create immediate impacts and that immediate impacts on company resources and capabilities will lead to subsequent impacts on company performance, an expectation that holds across all types of innovation intermediaries. Details of how innovation intermediaries achieve their desired impact are shown in the lower part of the diagram. The activities in which innovation intermediaries engage are supported by knowledge-based and tangible inputs, and they lead to a wide range of outputs such as knowledge, relationships, events, publications, prototypes, equipment, and facilities. The outputs are expected to lead, in turn, to the immediate, intermediate, and long-term impacts described above.

TEN also provides statistical examinations of the relationships between outputs, immediate impact, and intermediate impacts that make it to determine which outputs and immediate impacts are significantly related to the impact of the intermediary on companies' performance in the market.

TEN measures the importance of outputs, and immediate and intermediate impacts using a customized survey instrument. Our impact assessment surveys are short and easy for member or client companies to complete. Assessments can focus on a single organization, can compare actual to targeted performance, or can compare the performance of multiple units, divisions or organizations.

Global Access Program: Client Companies

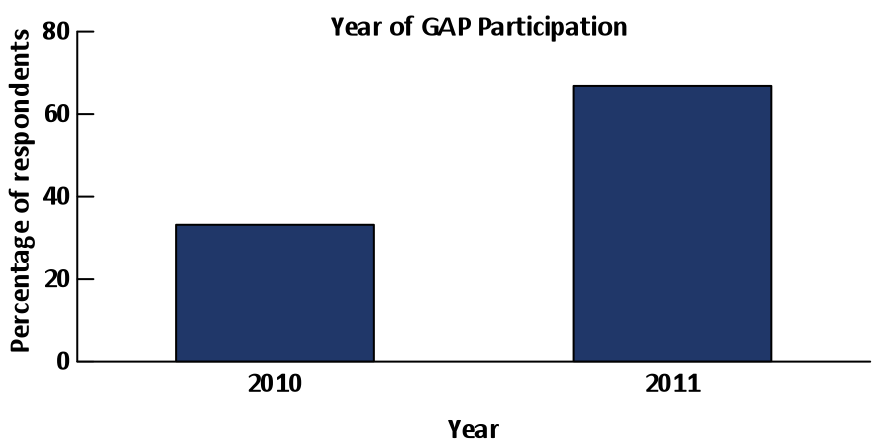
This section provides information on the 21 respondent companies and their satisfaction with the GAP's offerings.

GAP's Client Companies

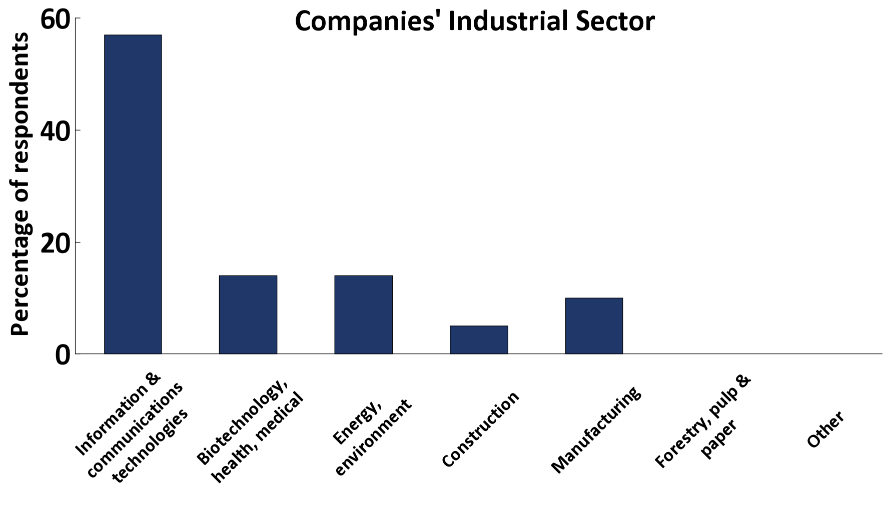
We begin by providing descriptions of the companies that received services from the GAP in terms of year the company was founded, number of employees, annual revenues, and industrial sector:

- 33% of the companies participated in the GAP program in 2010; 67% of the companies participated in 2011.
- GAP drew client companies from a broad range of sectors, with an emphasis on Information and communication technologies, representing 57% of clients. Other sectors include Biotechnology, health and medical (14%), Energy and environment (14%), Manufacturing (10%), and Construction (5%).
- 48% of companies had revenues greater than €5 million; 14% had revenues less than €500 K.
- 33% of the companies had less than 20 employees; 19% had more than 100 employees.
- 63% of the companies were established between 2001 and 2010, and 37% were established in 2000 or earlier.

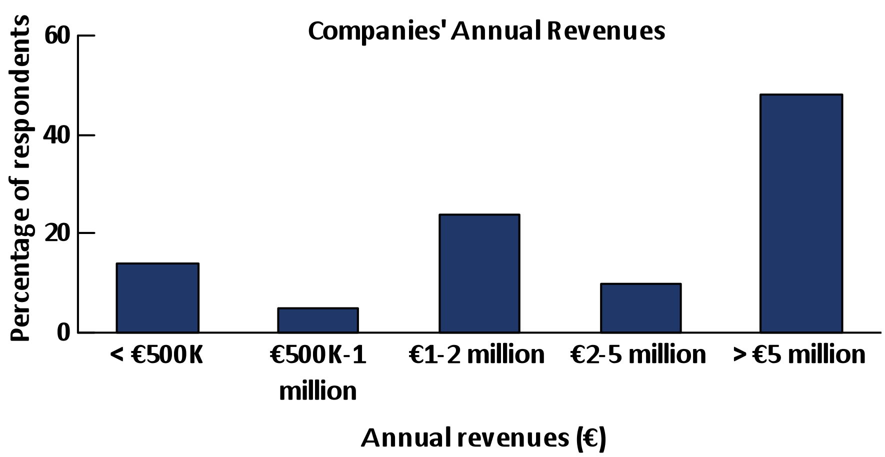
Figures describing the surveyed companies follow, each accompanied by the corresponding survey question and the number of respondents (n).



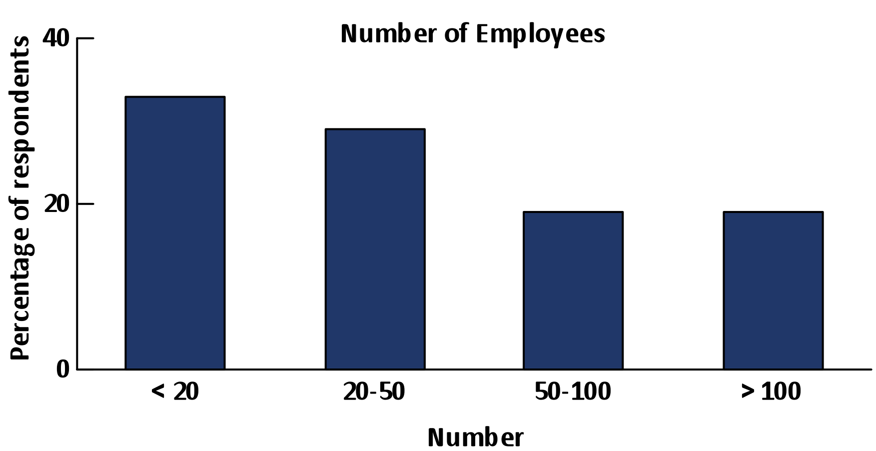
What year did your company participate in GAP?
n=21



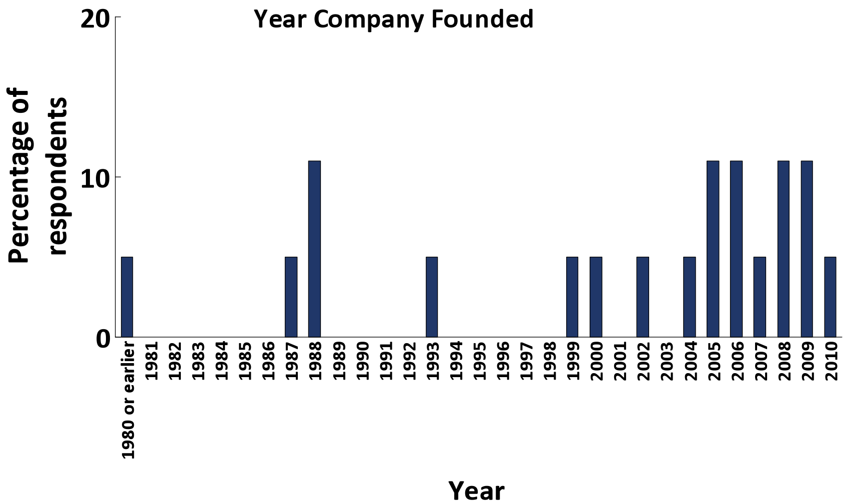
To what industrial sector does your company belong?
n=21



What are you company's annual revenues?
n=21



How many people does your company employ?
n=21



When was your company founded?
n=19

Company Performance

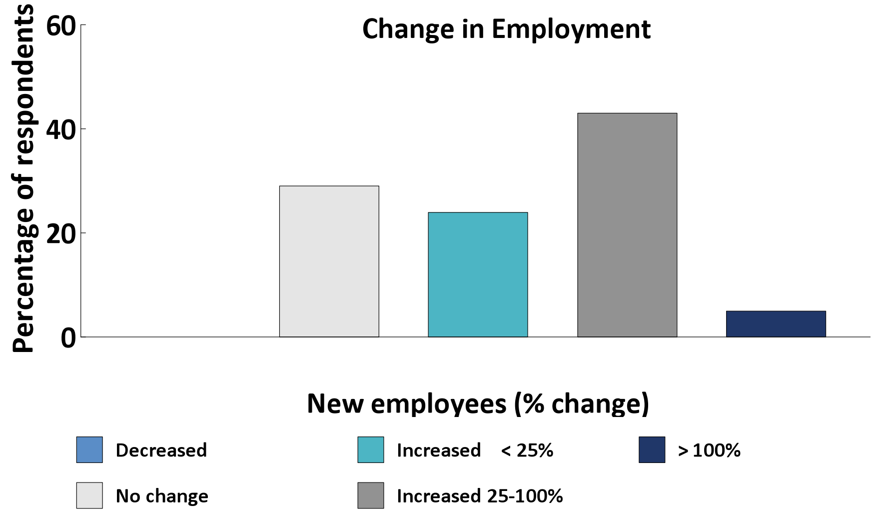
This section provides information on the performance of the surveyed companies. The measures include: New international customers, Change in employment, Change in annual revenues, Export sales revenues, and Financing received.

Important attributes of the companies are:

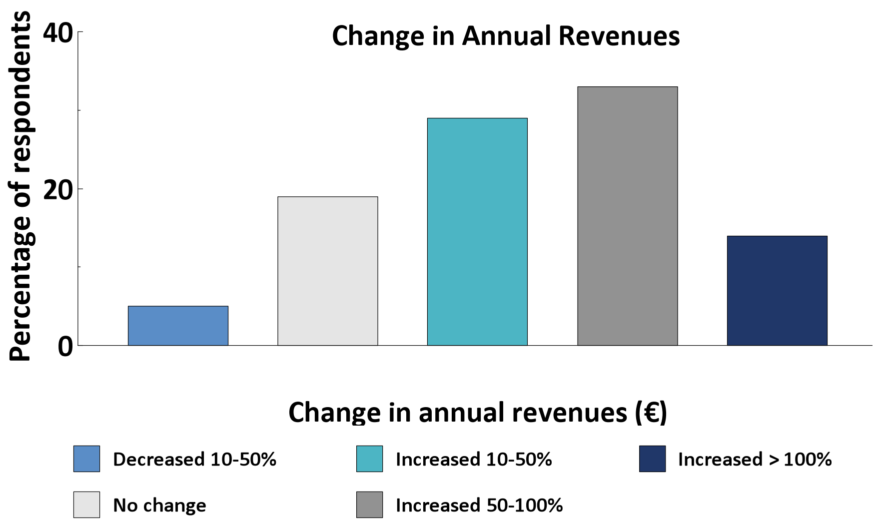
- 67% of the companies report having acquired more than three international customers since their participation in the GAP program, while 24% report having acquired more than 10 new international customers.
- No companies reported a decrease in employment since their project with GAP; 48% report an increase greater than 25%, and 29% report no change in their employment since their project with GAP.
- Most companies have experienced increases in revenues since their project with GAP, with 47% having experienced revenue increases of greater than 50%.
- 57% of companies reported export sales of €1 million or greater. 39% of companies reported export sales less than €1 million.
- 24% of companies reported receiving financing of €1 million or greater. 14% of companies reported receiving between € 500K and €1 million in financing. 24% reported receiving between €100k and €500k in financing, and 29% reported receiving no financing.

Figures describing the surveyed companies follow, each accompanied by the corresponding survey question and the number of respondents (n).

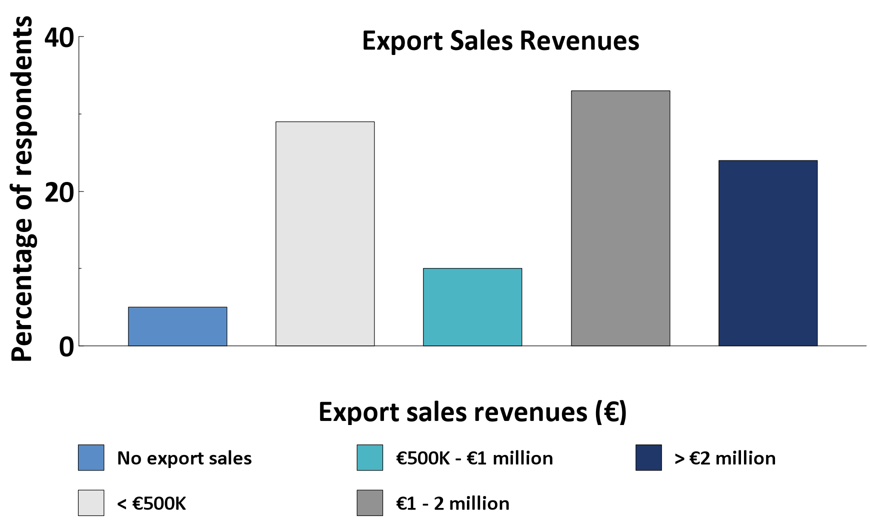
How many new international customers has your company acquired since its participation in GAP?
n=21



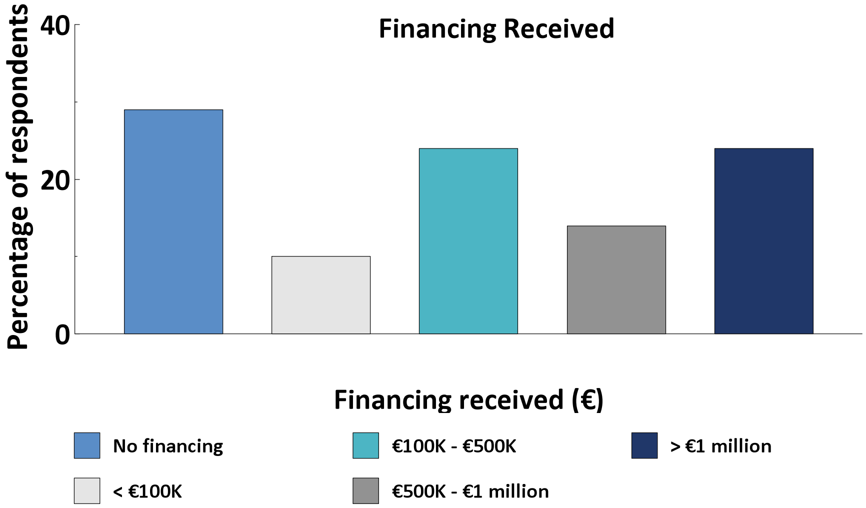
To what degree has employment at your company changed since its participation in GAP?
n=21



By how much have your company's annual revenues changed since its participation in GAP?
n=21



What are your company's total export sales revenues?
n=21



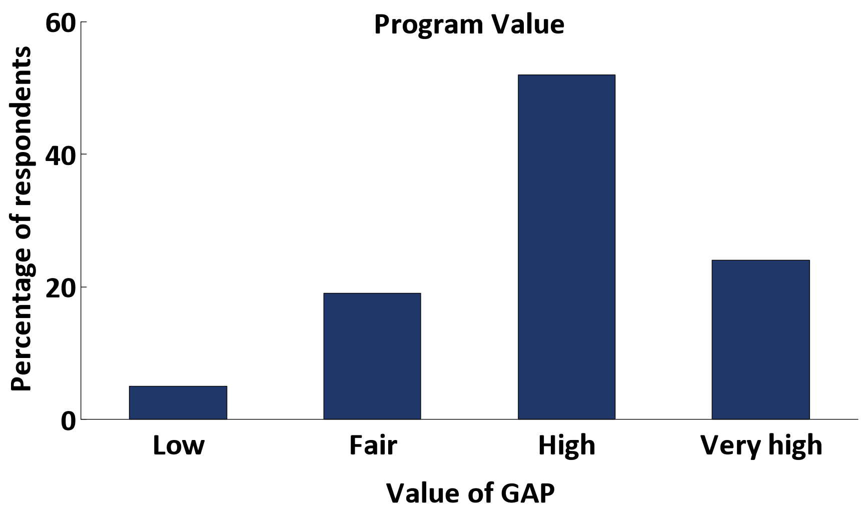
How much financing has your company received, from either private or public sources, since its participation in GAP?
n=21

Value of GAP

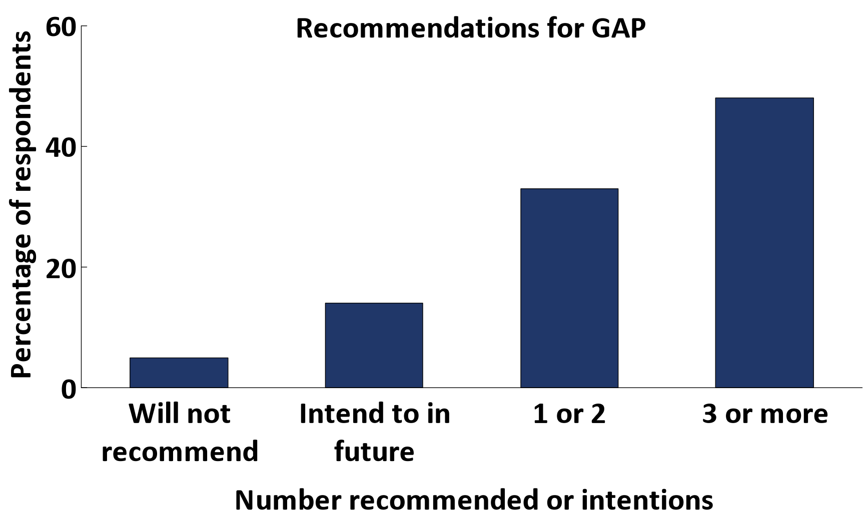
All companies that completed the survey were asked about the value of the GAP program relative to its cost, as well as their willingness to recommend the GAP to other companies.

The following diagram shows that 76% of all the companies found value relative to cost to be high or very high. Only 5% found the value of the GAP to be low.

Companies were also asked whether they had recommended the GAP to others. 95 percent had recommended or planned to recommend the GAP to others, while only 5% did not plan to recommend the GAP.



What was the value of GAP relative to its costs?
n=21



To how many other companies have you recommended the GAP?
n=21

Global Access Program: Importance of Offerings

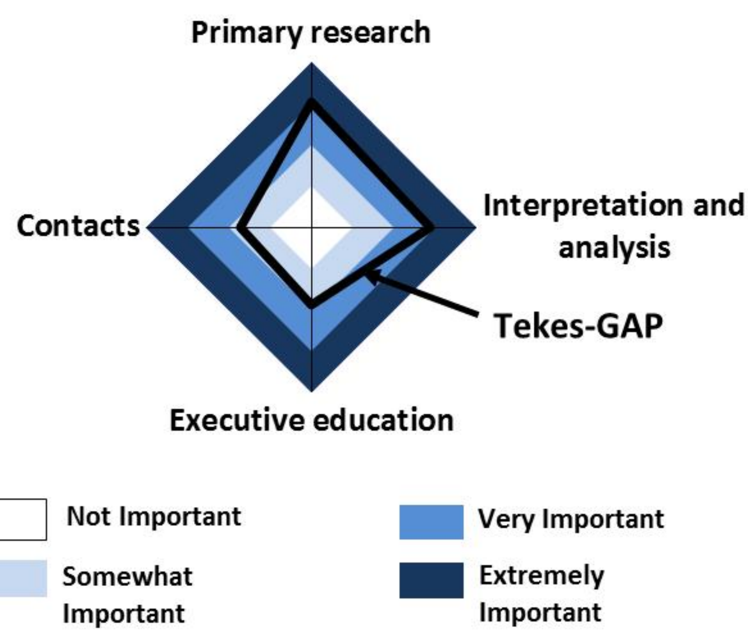
This section provides a summary of the importance of services offerings of the GAP followed by detailed results.

Summary of the Importance of Offerings

The following table shows the key service offerings of the GAP.

GAP Offerings
• Primary research (100+ interviews) • Interpretation and analysis of research findings • Executive education • Business and consultancy contacts

The figure below summarizes the average importance of the GAP offerings.



Average Importance of Offerings of the Global Access Program

Detailed Importance of Offerings Results

The average importance reported on each dimension in the previous section is calculated using the weights shown in the table below.

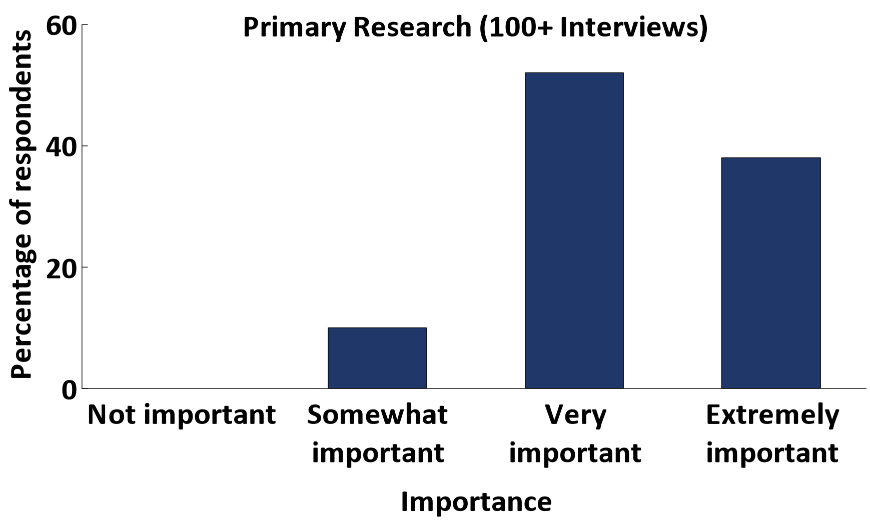
Importance of Output	Weights
Not important	0
Somewhat important	3.33
Very important	6.67
Extremely important	10

Analysis of the information presented in these figures shows that the GAP service offerings are 'very important' or 'extremely important' for:

- 90% of companies when the offering is Primary research
- 90% of companies when the offering is Interpretation and analysis of research findings
- 45% of companies when the offering is Executive education
- 35% of companies when the offering is Business or consultancy contacts

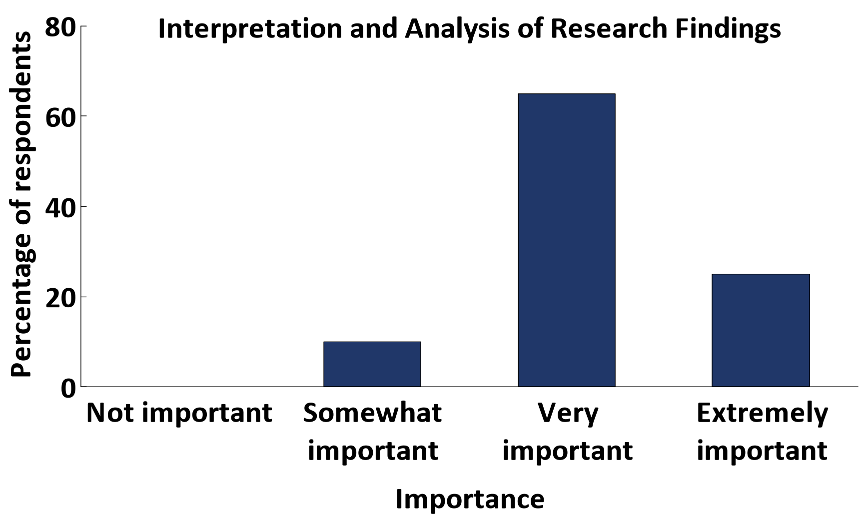
We tested for significant differences among offerings and found that the average importance for Primary research and Interpretation and analysis of research findings measures were significantly higher than Executive education and Business and consultancy contacts measures (significant at the 99% confidence level).

The frequency distributions below show responses on importance of offerings, together with the corresponding survey questions, number of responses and average importance scores. Details on our standardized question format are provided in Appendix B.

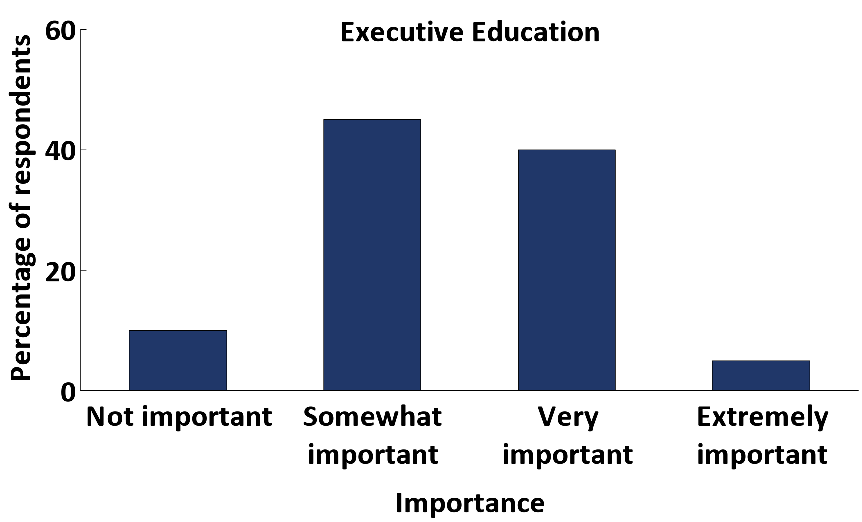


Please assess the importance of each of the following GAP offerings:

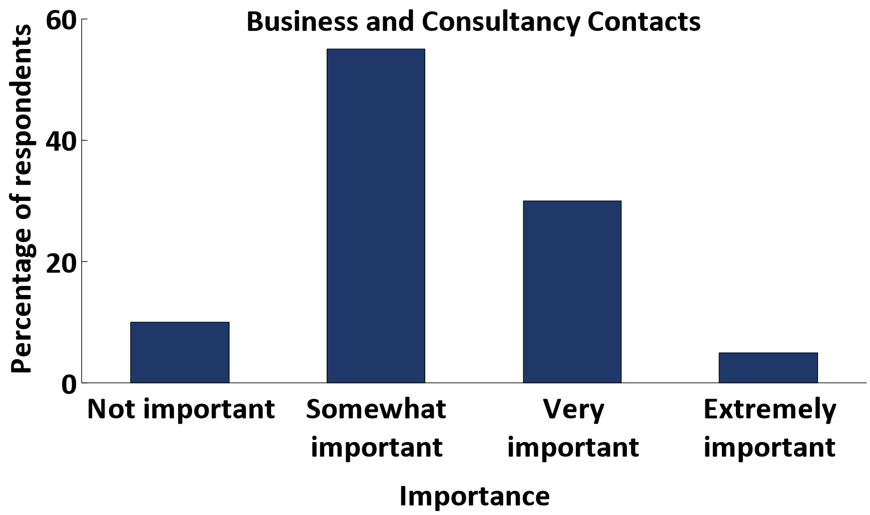
Primary research (100+ interviews)
n=21; Average=7.6



Interpretation and analysis of research findings
n=20; Average=7.2



Executive education
n=20; Average=4.7



Business and consultancy contacts
n=20; Average=4.3

Global Access Program: Immediate Impact

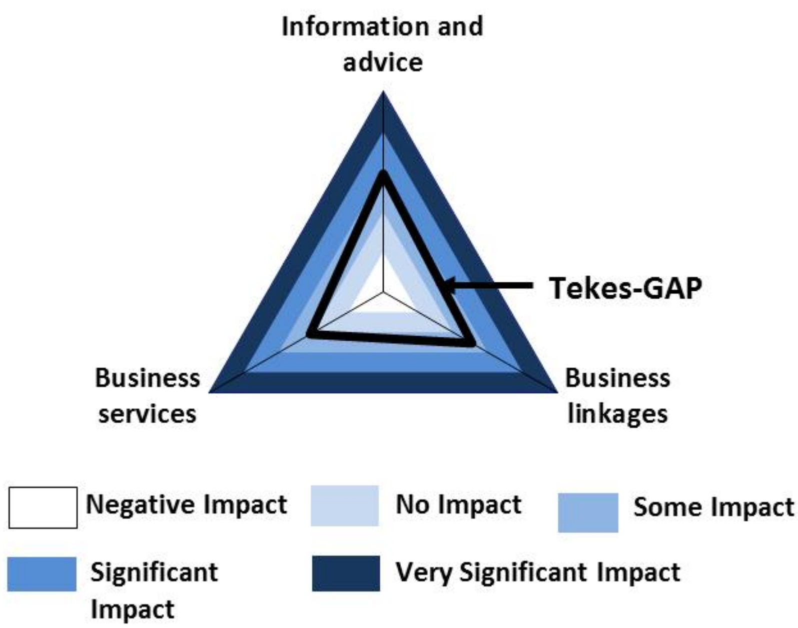
This section provides a summary of the immediate impact of the GAP followed by detailed immediate impact results.

Summary of Immediate Impact

The utility in using TEN's logic model for innovation intermediaries is that it provides broad dimensions to guide the selection of measures for impact assessment. These dimensions are listed in the logic model diagram in the earlier section entitled TEN's Impact Assessment Methodology.

The following table shows the three immediate impact dimensions that were selected from TEN's logic model to assess the impact of the GAP on the resources and capabilities of client companies, and the figure below it summarizes the average impact. When we remove from the sample those respondents that indicated specific measures were not applicable, we find that the GAP achieves impact across all dimensions from the low end of the 'significant impact' range to the low end of the 'some impact range'.

Selected Immediate Impact Dimensions
• Knowledge, information and advice • Business linkages • Business services



Average Immediate Impact of the Global Access Program

Detailed Immediate Impact Results

The mapping between immediate impact dimensions and immediate impact measures is shown in the table below. Details on our standardized question format are provided in Appendix B.

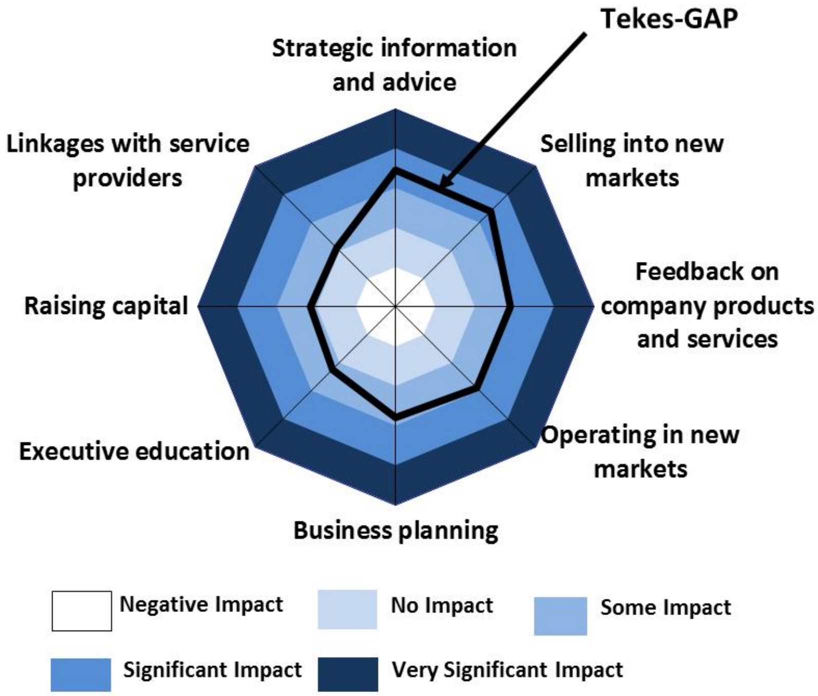
Mapping of Immediate Impact Measures to Immediate Impact Dimensions

Immediate Impact Dimensions	Immediate Impact Measure(s)
Information and advice	• Strategic business information or advice • Feedback on products or services • Selling into new markets • Operating in new markets • Raising capital
Business linkages	• Facilitation of linkages with service providers
Business services	• Business planning services • Executive education services

Immediate impact is measured on a scale of 0 to 10 using the weights shown in the table below.

Immediate Impact Responses	Weights
Negative impact	0
No impact	2.5
Some impact	5.0
Significant impact	7.5
Very significant impact	10
Not applicable	n/a

The figure below shows average immediate impact responses for all eight immediate impact measures. Reading clockwise, the average immediate impacts range from 'significant impact' for the Strategic business information or advice, and Selling in new markets measures to the bottom of the 'some impact' range for the Raising capital and Linkages with service providers measures.



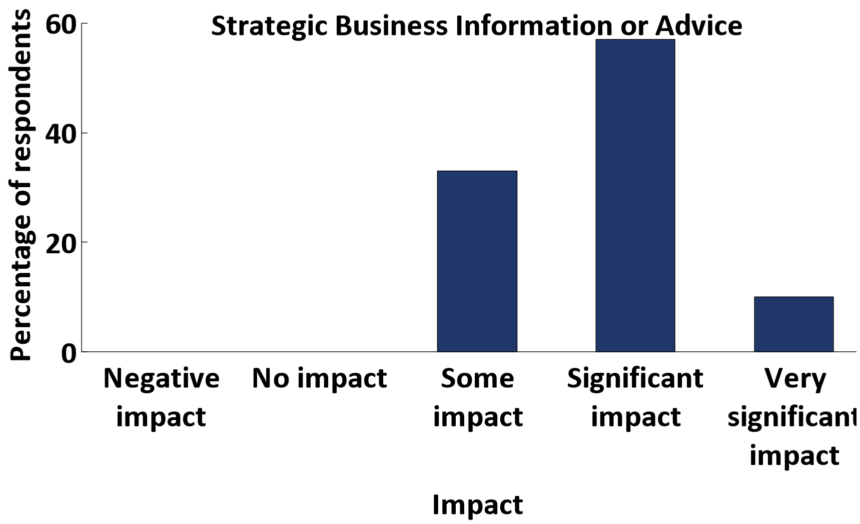
Average Immediate Impact of the Global Access Program (all measures)

Using the weighted averages, we tested for significant differences among the measures. The scores on the lowest three measures – Linkages with service providers, Raising capital, and Executive education were significantly lower than those of the top four measures – Strategic information and advice, Selling in new markets, Feedback on company products and services, and Operating in new markets.

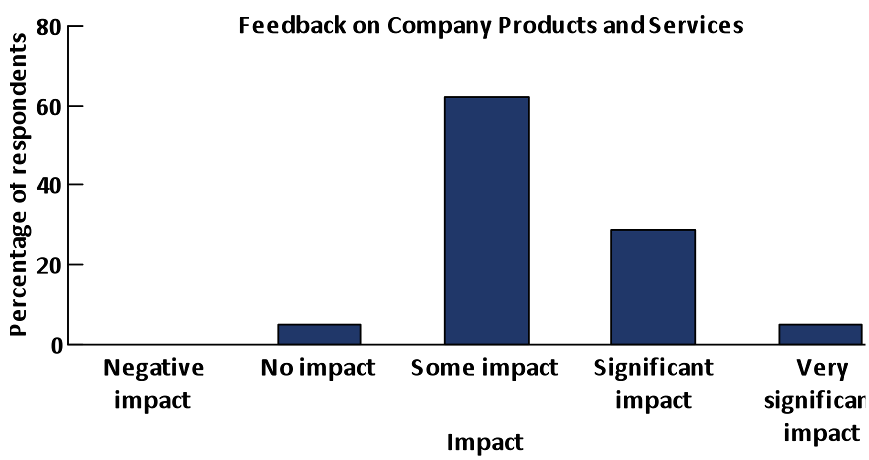
We now consider the unweighted responses regarding immediate impact measures. Using the number of companies that reported ‘significant’ or ‘very significant’ immediate impact, the following four measures ranked highest.

- Strategic business information or advice (67% of respondents)
- Information or advice on selling in new markets (62% of respondents)
- Feedback on company products and services (34% of respondents)
- Information or advice on operating in new markets (34% of respondents)

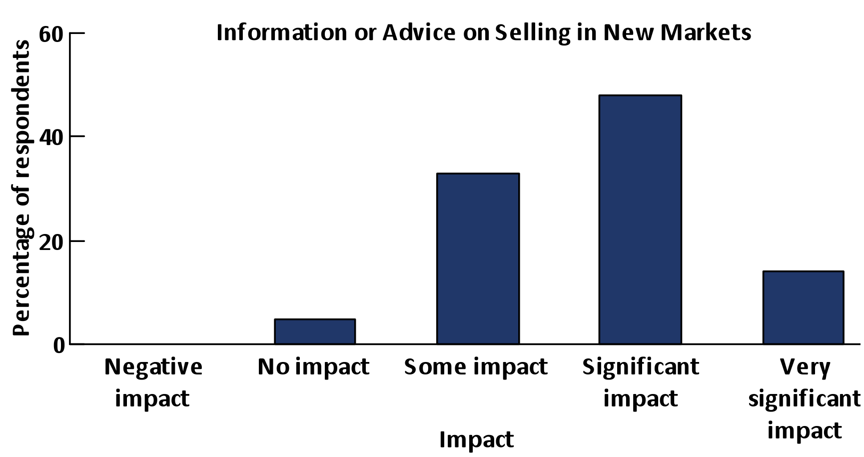
The frequency distributions below show immediate impact responses for all eight immediate impact measures, together with the corresponding survey questions, number of responses and average immediate impact scores (out of 10).



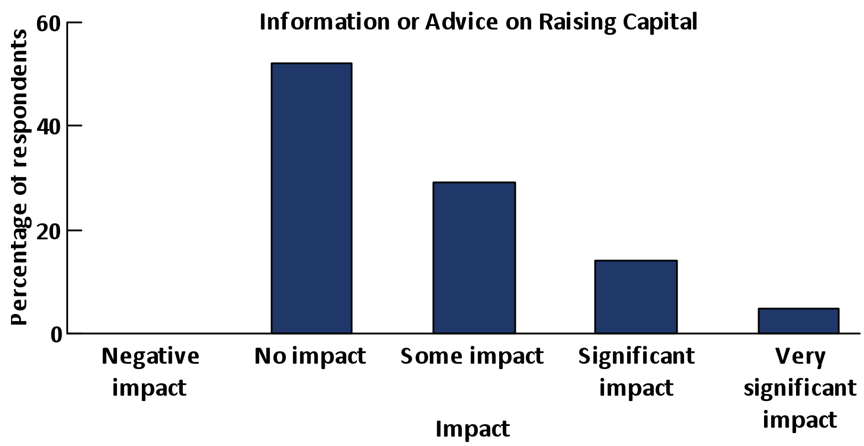
To what degree did strategic business information or advice provided by GAP impact your company?
n=21; Average=6.9



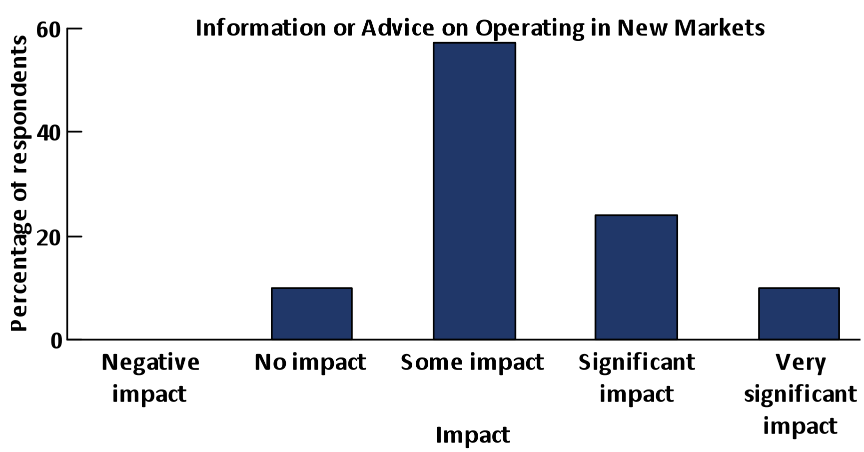
To what degree did feedback on your company's products or services provide by GAP impact your company?
n=21; Average=5.8



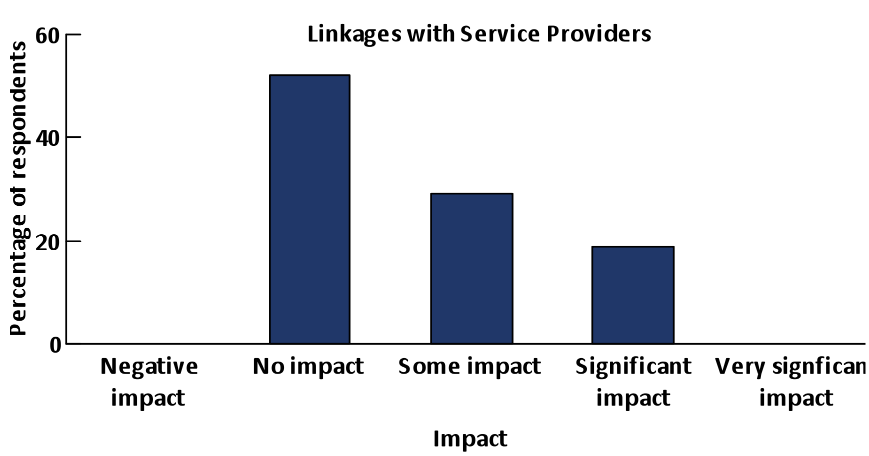
To what degree did information or advice on selling into new markets provided by GAP impact your company?
n=21; Average=6.8



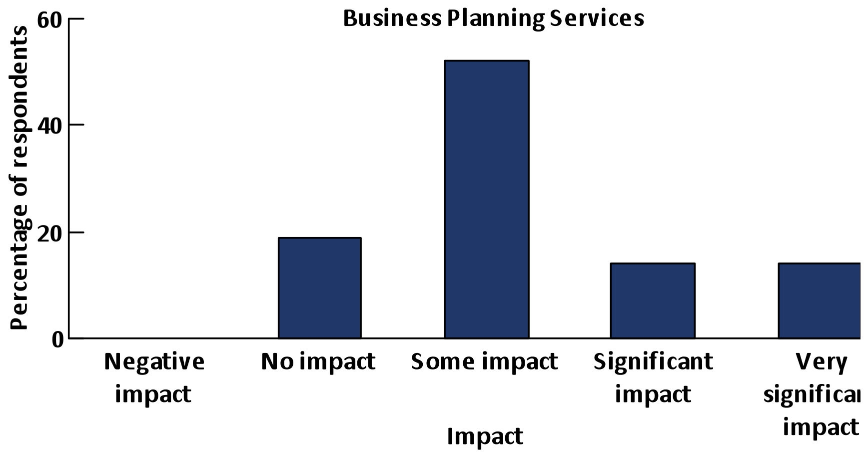
To what degree did information or advice on raising capital provided by GAP impact your company?
n=21; Average=4.3



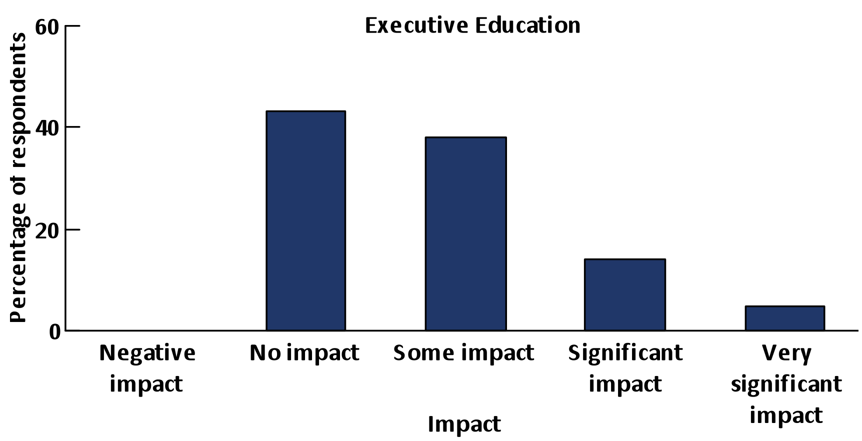
To what degree did information or advice on operating in new markets provided by GAP impact your company?
n=21; Average=5.8



To what degree did linkages with service providers facilitated by GAP impact your company?
n=21; Average=4.2



To what degree did the business planning services provided or facilitated by GAP impact your company?
n=21; Average=5.6



To what degree did executive education services provided by GAP impact your company?
n=21; Average=4.5

Appendix C shows additional information for all immediate impact measures segmented according to the year of company formation, industrial sector, annual revenues, number of employees, year of participation in GAP, GAP program value, and recommendations of the GAP program. Appendix C also shows average immediate impact scores segmented according to the importance of GAP service offerings.

The highlights from the information segmented by company characteristics are:

- Older companies (founded 1990 or earlier) reported higher immediate impact of GAP than younger companies (founded 2001 or later). This is true for the overall immediate impact (significant at the 99% confidence level) and for impact regarding Strategic business information or advice (significant at the 95% confidence level).
- Companies in the different industry sectors showed no significant differences in the overall immediate impact attributed to GAP. However, companies in the Information and communications technologies sector attributed significantly less impact to Business

planning services than companies in the Manufacturing sector, as well as significantly less impact to Linkages with service providers than companies in the Construction sector (significant at the 95% confidence). Conversely, Biotechnology, health and medical companies rated Executive education significantly higher than companies in the Construction sector did (significant at the 95% confidence level). No two sectors ranked the different measures of immediate impact of GAP in the same order.

- Companies with revenues above €5 million report significantly higher overall immediate impact than companies between €1 and 2 million (significant at the 95% confidence level).
- Companies with 50 employees or more report significantly higher impacts than smaller companies (significant at the 99% confidence level).
- There is no significant difference between companies participating in the GAP program in either 2010 or 2011.
- Companies that reported "very high" Program Value also derived significantly higher immediate impacts (significant at the 95% confidence level or higher).
- Companies that have recommended GAP to three or more other companies report significantly higher impacts than those companies responding they will not recommend GAP or that they intend to do so in the future (significant at the 95% confidence level or higher).

Global Access Program: Intermediate Impact

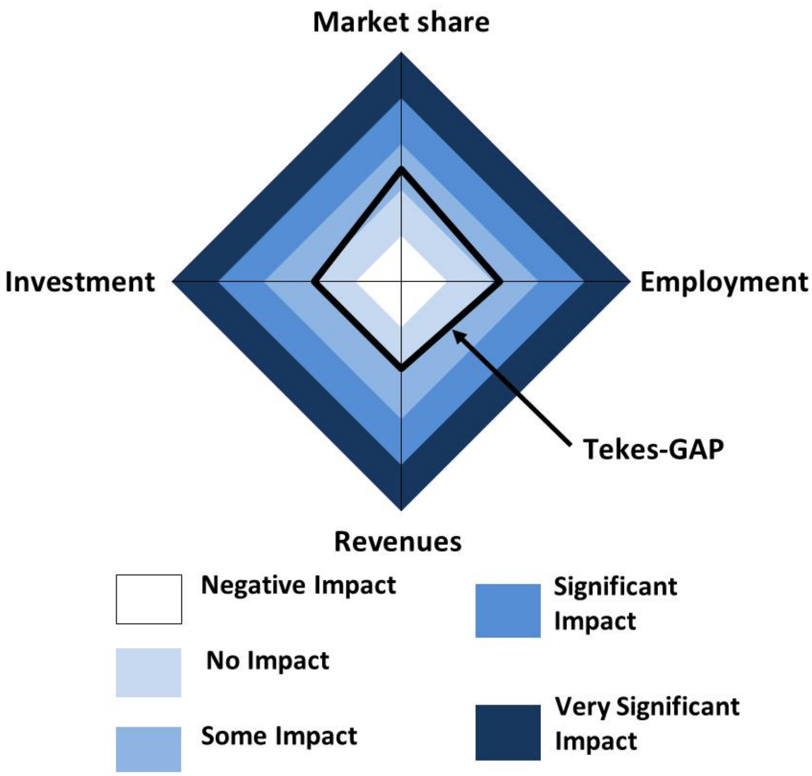
This section provides a summary of the intermediate impact of the GAP, followed by detailed intermediate impact results.

Summary of Intermediate Impact

The following table shows the four intermediate impact dimensions that were selected from TEN's logic model to assess the GAP's impact on company performance.

Selected Intermediate Impact Dimensions	
• Market share	• Revenues
• Employment	• Investment

The figure below summarizes the average impact of the GAP on its clients' performance for each of the selected impact dimensions. We find that the GAP's average impact for Market share is in the middle of the 'some impact' range, while the average impacts for the Employment, Revenues, and Investment dimensions are at the lower end of the 'some impact' range.



Average Intermediate Impact of the Global Access Program

Detailed Intermediate Impact Results

The impact reported on each intermediate impact dimension in the previous section is the average of one or more intermediate impact measures. The mapping between intermediate impact dimensions and intermediate impact measures is shown in the following table.

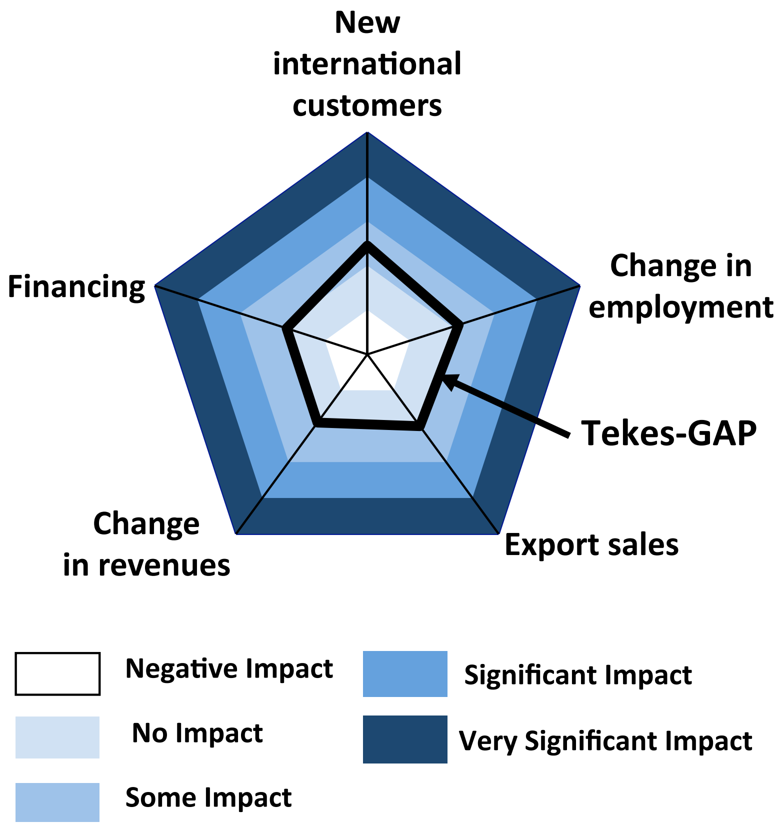
Mapping of Intermediate Impact Measures to Intermediate Impact Dimensions

Intermediate Impact Dimensions	Intermediate Impact Measure(s)
Market share	• Impact on acquiring new international customers
Employment	• Impact on change in employment
Revenues	• Impact on change in revenues • Impact on export sales revenues
Investment	• Impact on financing received

Impact is measured on a scale of 0 to 10 using the weights shown in the table below.

Intermediate Impact Responses	Weights
Negative impact	0
No impact	2.5
Some impact	5.0
Significant impact	7.5
Very significant impact	10

The figure below shows average intermediate impact responses for all five intermediate impact measures. Reading clockwise, the average impacts range from the middle of the 'some impact' range for impact on acquiring International customers to the lower end of the 'some impact' range for the remaining measures – Employment, Export sales revenues, Annual revenues, and Financing.



Average Intermediate Impact of the Global Access Program (all measures)

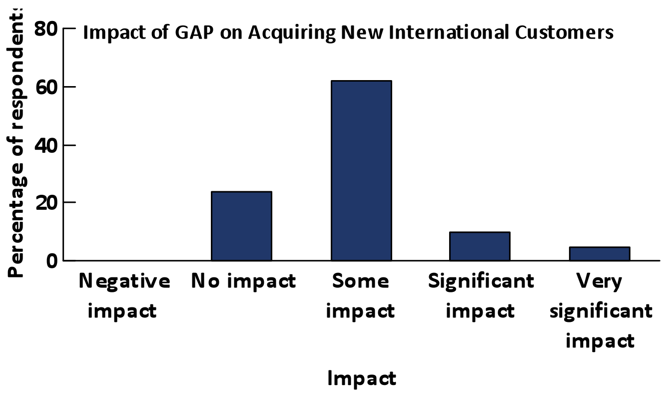
Testing for significant differences among the measures showed that the differences are generally not statistically significant, with the exception that the impact of GAP on acquiring new International customers is significantly higher than its impact on Annual revenues (significant at the 95% confidence level).

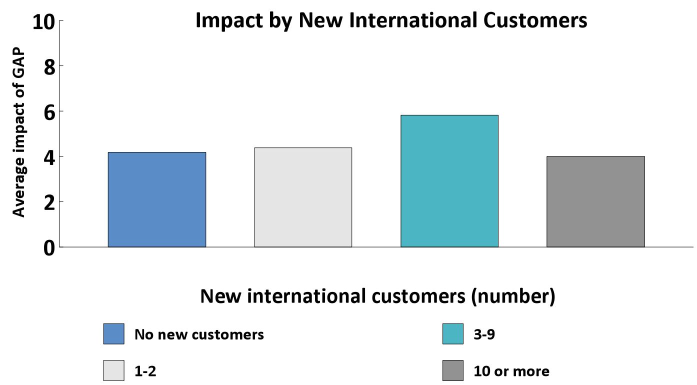
To document the distribution of scores, the following list presents the ranking of the unweighted intermediate impact measures according to the number of companies that reported 'some' intermediate impact or greater:

- New international customers (77%)
- Change in employment (57%)
- Export sales (57%)
- Change in annual revenues (48%)
- Financing (38%)

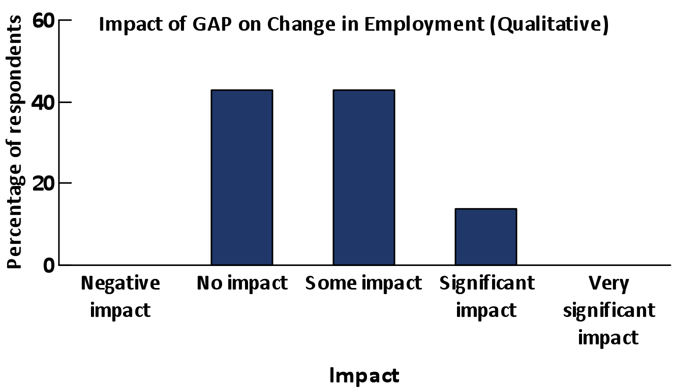
The following figures (on the left) give each intermediate impact question, number of respondents (n), and average score for that measure (out of 10), followed by a figure that shows the frequency distribution of responses. Details on question format are provided in Appendix B. The figures on the right show the average impact scores (out of 10) segmented according to company performance results.

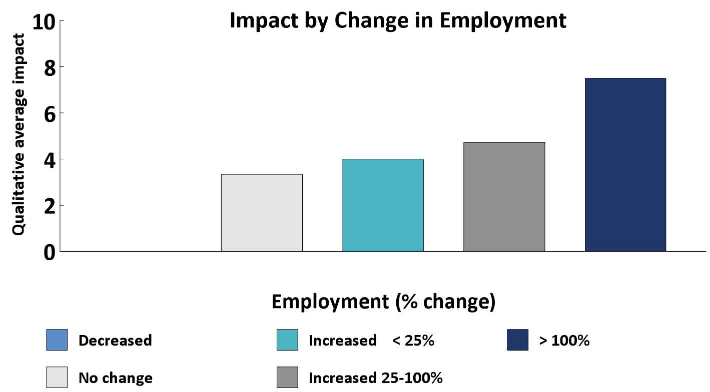
To what degree has GAP impacted the number of new international customers since its participation in GAP?
n=21; Average=4.9



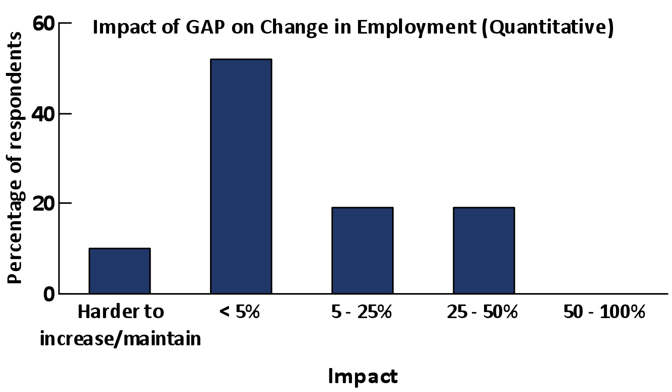


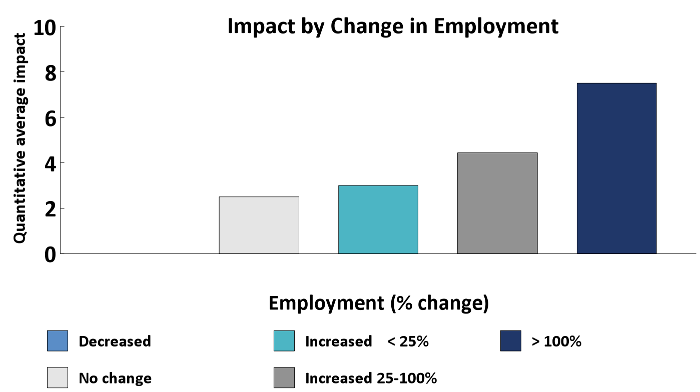
In <u>qualitative</u> terms, to what degree has GAP impacted change in employment at your company since its participation in GAP?
n=21; Average=4.3



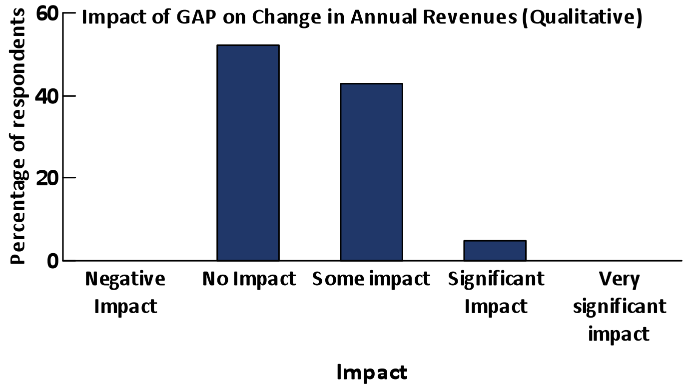


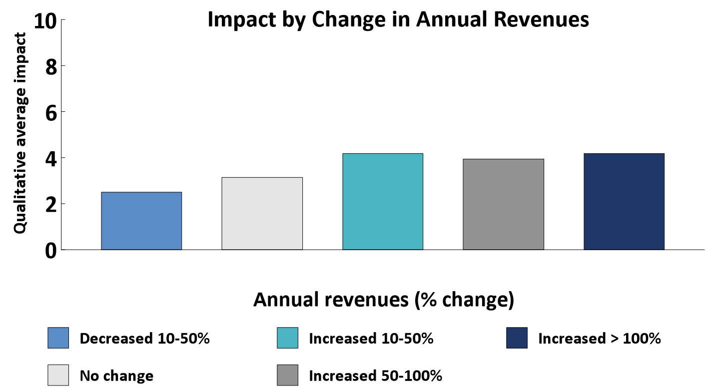
In <u>quantitative</u> terms, to what degree has GAP impacted change in employment at your company since its participation in GAP?
n=21; Average=3.7



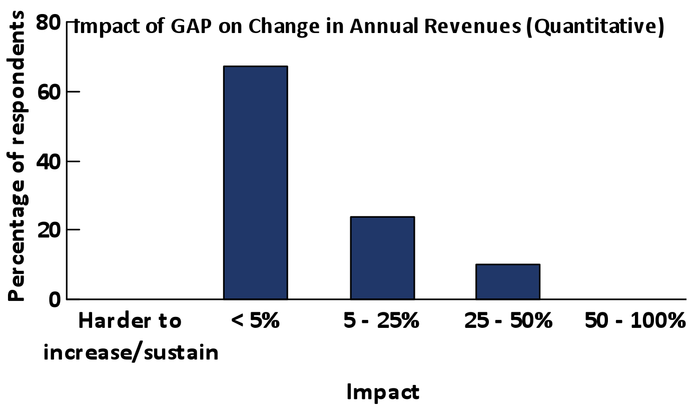


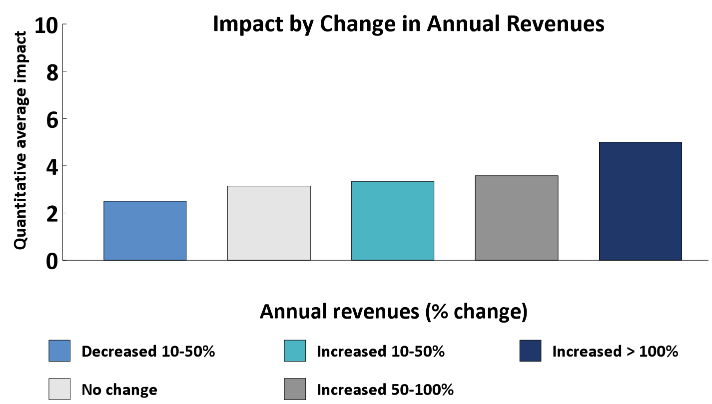
In <u>qualitative</u> terms, to what degree has GAP impacted your company's change in annual revenues?
n=21; Average=3.6



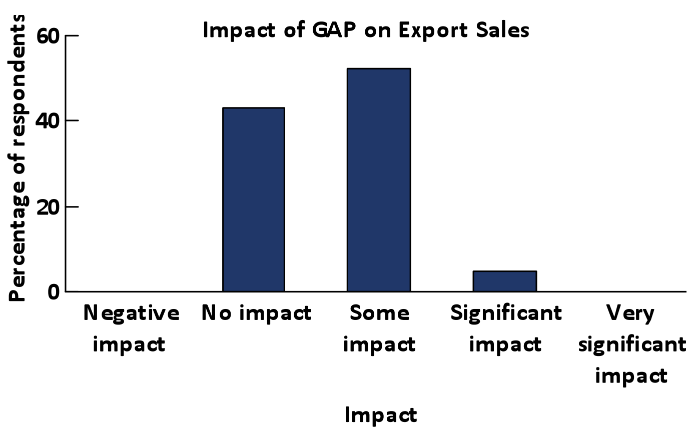


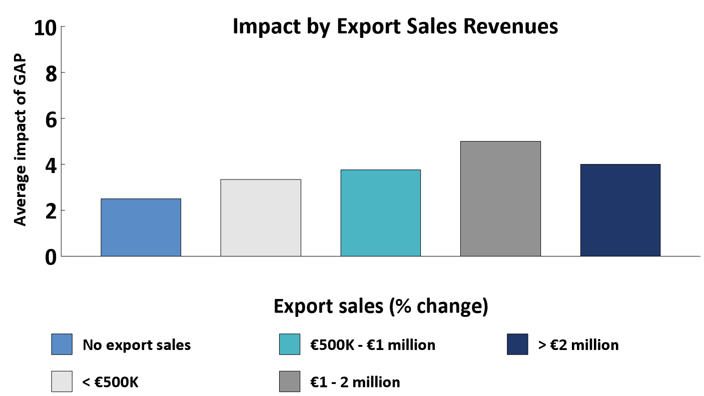
In <u>quantitative</u> terms, to what degree has GAP impacted your company's change in annual revenues?
n=21; Average=3.8



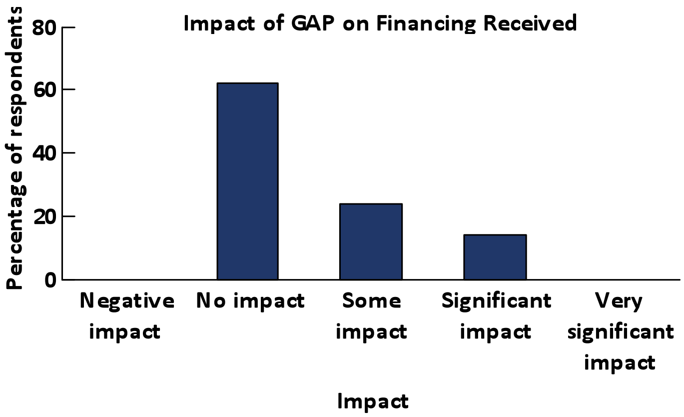


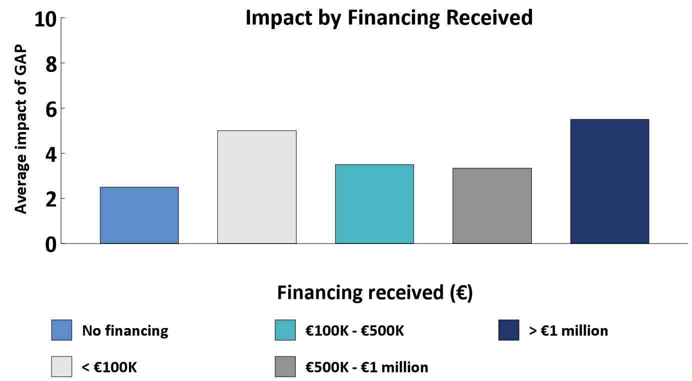
To what degree has GAP impacted your company's total export sales revenues since its participation in GAP?
n=21; Average=4.1





To what degree has GAP impacted your company's financing received since its participation in GAP?
n=21; Average=3.8





Appendix D shows detailed information for all intermediate impact measures segmented according to year the company was founded, number of employees, annual revenues, and industrial sector. Appendix D also shows average intermediate impact scores segmented according to the importance of GAP service offerings.

From the information segmented by company attributes, we find that:

- There are no statistically significant differences in the intermediate impact of GAP on younger and older companies.
- Companies in the Energy and environment sector, and those in the Biotechnology, health and medical sector attributed significantly higher average impacts than companies in the Information & communication technologies, Construction and Manufacturing sectors (significant at the 95% confidence level or higher).
- Companies with revenues between €500k and €2 million report significantly higher average intermediate impacts of GAP than those with revenues of less than €500K (significant at the 99% confidence level), and those with revenues between €2 and €5 million (significant at the 95% confidence level or higher).
- Companies with 20 to 50 employees reported a significantly higher average intermediate impact than companies with less than 20 employees (significant at the 99% confidence level) and those with more than 100 employees (significant at the 95% confidence level).
- There are no statistically significant differences between companies participating in the GAP program in 2010 versus 2011.
- Companies reporting ‘very high’ program value report significantly higher intermediate impact than companies reporting ‘low’ to ‘high’ program value (significant at the 99% confidence level).
- Companies indicating they had recommended GAP to three or more other companies report significantly higher intermediate impact than companies indicating they will not recommend GAP, intend to do so in the future, or have recommended GAP to one or two other companies (significant at the 99% confidence level).

Conclusions

The Evidence Network's assessment of the performance of the Global Access Program enables the following conclusions about its impact on client companies:

1. ***Client Companies:*** The companies accessing GAP operate in a broad range of sectors, with the majority of responding companies in the Information and communications technologies sector (57%). The largest group of companies has revenues of more than €5 million (48%), although most responding companies have less than 50 employees (62%). 63% of the companies were founded after the year 2000.

2. ***Importance of Offerings:*** The two service offerings of Primary research and Interpretation and analysis of research findings ranked highest: Ninety percent of the companies considered these to be either 'very important' or 'extremely important'.

3. ***Immediate Impact:*** GAP achieves immediate impact on participating companies. On average, GAP's Strategic business information and advice, Information and advice on selling into new markets, Feedback on company products and services, and Information or advice on operating in new markets either achieved or bordered on achieving 'significant' immediate impact. For these four measures, the percentage of companies that reported 'significant' or 'very significant' impact was 67%, 62%, 34% and 34%, respectively.

4. ***Intermediate Impact:*** GAP also achieves longer-term impact on the market performance of participating companies. GAP is achieving 'some impact' for all assessment dimensions. The top three average impact results are for New international customers, Change in number of employees, and Export sales revenue measures. For these three measures, the percentage of companies that reported 'some impact' or greater was 77%, 57%, and 57%, respectively.

5. ***Comparing Immediate and Intermediate Impact:*** The immediate impact of GAP ranks higher than the intermediate impact. This is understandable because services provided by innovation intermediaries have a direct and immediate impact on the resources and capabilities of client companies, while intermediate impacts will take place in the longer term. In addition, intermediate impact in the longer term is more difficult to attribute to innovation intermediary activities, the impact of which are diluted as they are combined with other factors.

6. ***Value of GAP:*** Seventy-six percent of all companies found value relative to cost to be high or very high. Ninety-five percent had recommended or planned to recommend GAP to others.

Overall, our findings document substantial contributions by the GAP program. Not only are core program activities assessed to be 'very important' or 'extremely important' by most of the respondents, but impact on the resources and capabilities of the companies is being manifested in improved company performance in the marketplace. These results are impressive as the companies that participated in GAP are established and successful prior to participation, requiring targeted and effective interventions to achieve performance improvements.

The findings from this report will be compared to those of the earlier assessment in a companion report, which also will provide an examination the factors that predict impact on company performance, and an estimation of the impact of GAP on Finnish GDP and employment.

Appendix A: Description of Sample

The following table provides information on the relationship between the number of invitations that were sent to potential respondent companies, and the number of respondents.

Survey Response Profile of GAP Clients	
Number of invitations sent to GAP clients	29
Number of formal email reminders to all non-respondents by TEN	1
Telephone reminders to non-respondents by GAP	11
Number of GAP clients that entered the survey website	21
Number of GAP clients that provided survey responses	21
Response Rate	72%

Nineteen of the respondents took less than 12 minutes to complete the survey, having an average time-to-complete of 6.5 minutes. From the distribution with time-to-complete, it is evident that two of respondents were distracted, taking 21 minutes and 43 minutes, respectively, to complete the survey.

Appendix B: Examples of Questions

Examples of questions used by The Evidence Network to elicit importance of service offerings, immediate and intermediate impact are shown below.

Importance of Offerings

This example pertains to the assessment of the 'Importance of the GAP offerings' measure.

Please assess the importance of each of the following GAP offerings.

	Not important	Somewhat important	Very important	Extremely important
Primary research (100+ interviews)	☐	☐	☐	☐
Interpretation and analysis of research findings	☐	☐	☐	☐
Executive education	☐	☐	☐	☐
Business and consultancy contacts	☐	☐	☐	☐

Immediate Impact

This example pertains to the 'Information or Advice' measure.

It provides the question, example of the service referred to, and the scales that were used to elicit immediate impact, together with a brief phrase explaining each selection. The examples and explanatory phrases are particularly important to ensure respondents provide actual impact responses related to the service being described and that all respondents have the same understanding of the scale.

> *To what degree did strategic information or advice provided by GAP impact your company?*
>
> *Examples of strategic information or advice include information or advice related to the acceleration, adoption, postponement, or abandonment of corporate strategies such as those related to expansion of the scale of operations; diversification into new product lines, industrial or geographic markets; consolidation of scale, product lines, markets or operations; outsourcing; or the alignment of strategy and operations.*
>
> *Please choose one of the following responses:*

- *Very significant impact, the information or advice had a very significant impact on our company*
- *Significant impact, the information or advice had a significant impact on our company*
- *Some impact, the information or advice had some impact on our company*
- *No impact, the information or advice had no impact on our company*
- *Negative impact, the information or advice had a negative impact on our company*

Intermediate Impact

This example below pertains to the 'Financing' measure.

Intermediate impact is assessed using a question pair. The first question elicits information on company performance.

The second question elicits attribution of impact. In the second question, each impact response has an explanatory phrase to ensure other interpretations, perceptions and opinions related to the impact responses are minimized.

Company Performance

How much financing has your company received, from either private or public sources, since its participation in GAP?

- *€1 million or more*
- *Between €500K and €1 million*
- *Between €100K and €500K*
- *Less than €100K*
- *We have not received financing since our participation in GAP*

Question 2: Impact Attribution

To what degree has GAP impacted your company's financing received since its participation in GAP?

Please choose one of the following responses:

- *Very significant impact, without GAP we would have received much less financing*
- *Significant impact, without GAP we would have received somewhat less financing*
- *Some impact, without GAP we would have received marginally less financing*
- *No impact, GAP had no impact on our company's ability to attract financing*
- *Negative impact, GAP made it harder for our company to attract financing*

Appendix C: Segmented Immediate Impact Scores

In the tables below we show average immediate impact scores (out of 10) for each measure segmented according to year the company was founded, number of employees, annual revenues, industrial sector, year of participation in GAP, GAP program value, and recommendations of the GAP program. These tables are followed by tables that show average immediate impact scores segmented according to the outputs (service offerings) of the GAP.

We tested the segmented data to determine if there were significant differences between sub-samples. For all immediate impact measure scores and for the means of the immediate impact scores across all measures, significant differences between groups at the 99% confidence level are indicated by the 'A's, 'B's, 'C's and 'D's, while differences at the 95% confidence level are indicated by the 'a's, 'b's, 'c's, and 'd's.

Immediate Impact Scores of the GAP Segmented by Year Company Founded

		Year Company Founded		
	Mean	A. 2001-2010	B. 1991-2000	C. 1990 or earlier
Mean	5.5	5.3 --C	5.2 ---	6.5 A--
Strategic business information or advice	7.0	6.5 --c	7.5 ---	8.1 a--
Information or advice on selling in new markets	6.8	6.5 ---	6.7 ---	8.1 ---
Feedback on company products and services	5.8	5.2 ---	6.7 ---	6.9 ---
Information or advice on operating in new markets	5.8	5.6 ---	5.8 ---	6.3 ---
Business planning services	5.7	5.4 ---	4.2 ---	7.5 ---
Executive education	4.6	4.6 ---	4.2 ---	5.0 ---
Linkages with service providers	4.3	4.2 ---	3.3 ---	5.6 ---
Information or advice on raising capital	4.1	4.2 ---	3.3 ---	4.4 ---

Immediate Impact Scores of the GAP Segmented by Industrial Sector

	Mean	Companies' Industrial Sector						
		A. Information & communications technolog...	B. Biotechnology, health, medical	C. Energy, environment	D. Construction	E. Manufacturing	F. Forestry, pulp & paper	G. Other
Mean	5.5	5.2 -------	5.9 -------	5.9 -------	5.0 -------	6.1 -------	- -------	- -------
Strategic business information or advice	6.9	7.3 -------	6.7 -------	6.7 -------	5.0 -----FG	6.3 -----FG	- ---DE--	- ---DE--
Information or advice on selling in new markets	6.8	6.7 -------	7.5 -------	5.8 -------	7.5 -----FG	7.5 -----FG	- ---DE--	- ---DE--
Feedback on company products and services	5.8	5.6 -------	5.8 -------	6.7 -------	5.0 -----FG	6.3 -----FG	- ---DE--	- ---DE--
Information or advice on operating in new markets	5.8	5.8 -------	5.8 -------	5.8 -------	5.0 -----FG	6.3 -----FG	- ---DE--	- ---DE--
Business planning services	5.6	4.6 ----e--	6.7 -------	6.7 -------	5.0 -----FG	8.8 a----FG	- ---DE--	- ---DE--
Executive education	4.5	4.4 -------	5.0 ---d---	5.8 -------	2.5 -b---FG	3.8 -----FG	- ---DE--	- ---DE--
Information or advice on raising capital	4.3	3.8 -------	5.8 -------	5.0 -------	2.5 -----FG	5.0 -----FG	- ---DE--	- ---DE--
Linkages with service providers	4.2	3.5 ---d---	4.2 -------	5.0 -------	7.5 a----FG	5.0 -----FG	- ---DE--	- ---DE--

Immediate Impact Scores of the GAP Segmented by Annual Revenues

	Mean	Companies' Annual Revenues				
		A. < €500K	B. €500K-1 million	C. €1-2 million	D. €2-5 million	E. > €5 million
Mean	5.5	5.2 ------	5.0 ------	4.9 ----e	5.6 ------	5.9 --c--
Strategic business information or advice	6.9	6.7 ------	5.0 ------	6.0 ------	7.5 ------	7.5 ------
Information or advice on selling in new markets	6.8	7.5 ------	5.0 ------	5.5 ------	7.5 ------	7.3 ------
Feedback on company products and services	5.8	5.8 ------	5.0 ------	5.5 ------	6.3 ------	6.0 ------
Information or advice on operating in new markets	5.8	6.7 ------	5.0 ------	5.5 ------	5.0 ------	6.0 ------
Business planning services	5.6	3.3 ------	5.0 ------	5.0 ------	6.3 ------	6.5 ------
Executive education	4.5	3.3 ------	5.0 ------	5.0 ------	5.0 ------	4.5 ------
Information or advice on raising capital	4.3	5.0 ------	5.0 ------	4.0 ------	5.0 ------	4.0 ------
Linkages with service providers	4.2	3.3 ------	5.0 ------	3.0 ------	2.5 ------	5.3 ------

Immediate Impact Scores of the GAP Segmented by Number of Employees

	Mean	Number of Employees			
		A. < 20	B. 20-50	C. 50-100	D. > 100
Mean	5.5	5.0 --CD	4.9 --CD	6.3 AB--	6.5 AB--
Strategic business information or advice	6.9	5.7 ---d	7.1 ----	7.5 ----	8.1 a---
Information or advice on selling in new markets	6.8	7.1 -b--	5.0 a--d	7.5 ----	8.1 -b--
Feedback on company products and services	5.8	5.7 ----	4.6 --c-	6.9 -b--	6.9 ----
Information or advice on operating in new markets	5.8	5.7 ----	5.0 ----	6.9 ----	6.3 ----
Business planning services	5.6	4.3 --c-	4.6 --cd	7.5 ab--	7.5 -b--
Executive education	4.5	3.2 ----	5.4 ----	5.0 ----	5.0 ----
Information or advice on raising capital	4.3	3.9 ----	4.2 ----	5.0 ----	4.4 ----
Linkages with service providers	4.2	3.9 ----	3.8 ----	3.8 ----	5.6 ----

Immediate Impact Scores of the GAP Segmented by Year of GAP Participation

	Mean	Year of GAP Participation	
		A. 2010	B. 2011
Mean	5.5	5.2 --	5.6 --
Strategic business information or advice	6.9	6.8 --	7.0 --
Information or advice on selling in new markets	6.8	6.1 --	7.1 --
Feedback on company products and services	5.8	6.1 --	5.7 --
Information or advice on operating in new markets	5.8	5.0 --	6.3 --
Business planning services	5.6	5.4 --	5.7 --
Executive education	4.5	4.6 --	4.5 --
Information or advice on raising capital	4.3	4.3 --	4.3 --
Linkages with service providers	4.2	3.2 --	4.6 --

Immediate Impact Scores of the GAP Segmented by Program Value

	Mean	Program Value			
		A. Low	B. Fair	C. High	D. Very high
Mean	5.5	4.1 ---D	4.9 ---d	5.4 ---d	6.4 Abc-
Strategic business information or advice	6.9	5.0 ----	5.6 ---d	7.0 ----	8.0 -b--
Information or advice on selling in new markets	6.8	5.0 ----	6.9 ----	6.6 ----	7.5 ----
Feedback on company products and services	5.8	5.0 ----	6.3 ----	5.7 ----	6.0 ----
Information or advice on operating in new markets	5.8	5.0 ----	5.6 ----	5.7 ----	6.5 ----
Business planning services	5.6	2.5 ----	5.0 ----	5.5 ----	7.0 ----
Executive education	4.5	2.5 ----	3.1 ----	4.8 ----	5.5 ----
Information or advice on raising capital	4.3	2.5 ----	4.4 ----	4.1 ----	5.0 ----
Linkages with service providers	4.2	5.0 -B--	2.5 A--d	4.1 ----	5.5 -b--

Immediate Impact Scores of the GAP Segmented by Recommendations

	Mean	Recommendations for GAP			
		A. Will not recommend	B. Intend to in future	C. 1 or 2	D. 3 or more
Mean	5.5	4.1 ---d	4.6 ---D	5.4 ----	5.9 aB--
Strategic business information or advice	6.9	5.0 ----	5.8 ----	6.4 ----	7.8 ----
Information or advice on selling in new markets	6.8	5.0 ----	5.8 ----	6.4 ----	7.5 ----
Feedback on company products and services	5.8	5.0 ----	5.0 ----	5.7 ----	6.3 ----
Information or advice on operating in new markets	5.8	5.0 ----	4.2 ----	6.1 ----	6.3 ----
Business planning services	5.6	2.5 ----	4.2 ----	6.1 ----	6.0 ----
Executive education	4.5	2.5 ----	3.3 ----	4.6 ----	5.0 ----
Information or advice on raising capital	4.3	2.5 ----	3.3 ----	5.0 ----	4.3 ----
Linkages with service providers	4.2	5.0 ----	5.0 ----	3.2 ----	4.5 ----

Immediate Impact Scores of the GAP Segmented by Primary Research

	Mean	Primary research (100+ interviews)			
		A. Not important	B. Somewhat important	C. Very important	D. Extremely important
Mean	5.5	- ----	5.9 ----	5.1 ---d	5.9 --c-
Strategic business information or advice	6.9	- -B--	6.3 A---	7.0 ----	6.9 ----
Information or advice on selling in new markets	6.8	- -B--	7.5 A---	6.6 ----	6.9 ----
Feedback on company products and services	5.8	- -B--	7.5 A-c-	5.5 -b--	5.9 ----
Information or advice on operating in new markets	5.8	- -B--	6.3 A---	5.7 ----	5.9 ----
Business planning services	5.6	- -B--	6.3 A---	5.0 ----	6.3 ----
Executive education	4.5	- -B--	3.8 A---	4.1 ----	5.3 ----
Information or advice on raising capital	4.3	- -B--	5.0 A---	3.9 ----	4.7 ----
Linkages with service providers	4.2	- -B--	5.0 A---	3.2 ---d	5.3 --c-

Immediate Impact Scores of the GAP Segmented by Interpretation and Analysis of Research Findings

	Mean	Interpretation and analysis of research findings			
		A. Not important	B. Somewhat important	C. Very important	D. Extremely important
Mean	5.4	- ----	4.5 ---D	5.1 ---D	6.4 -BC-
Strategic business information or advice	6.9	- -B--	6.3 A---	6.7 ----	7.5 ----
Information or advice on selling in new markets	6.6	- -B--	5.0 A---	6.9 ----	6.5 ----
Feedback on company products and services	5.8	- -B--	3.8 A---	6.0 ----	6.0 ----
Information or advice on operating in new markets	5.6	- -B--	5.0 A---	5.0 ---D	7.5 --C-
Business planning services	5.6	- -B--	3.8 A---	5.6 ----	6.5 ----
Executive education	4.5	- -B--	3.8 A---	3.7 ---D	7.0 --C-
Linkages with service providers	4.3	- -B--	6.3 A---	3.8 ----	4.5 ----
Information or advice on raising capital	4.0	- -B--	2.5 A--d	3.5 ---D	6.0 -bC-

Immediate Impact Scores of the GAP Segmented by Executive Education

	Mean	Executive education			
		A. Not important	B. Somewhat important	C. Very important	D. Extremely important
Mean	5.4	4.2 --C-	4.7 --C-	6.5 AB-d	5.0 --c-
Strategic business information or advice	6.9	6.3 ----	6.7 ----	7.5 ----	5.0 ----
Information or advice on selling in new markets	6.6	6.3 ----	6.4 ----	7.2 ----	5.0 ----
Feedback on company products and services	5.8	5.0 ----	5.3 ----	6.6 ----	5.0 ----
Information or advice on operating in new markets	5.6	5.0 ----	4.4 --C-	7.2 -B--	5.0 ----
Business planning services	5.6	2.5 --c-	5.0 ----	7.2 a---	5.0 ----
Executive education	4.5	2.5 ----	3.3 --C-	6.3 -B--	5.0 ----
Linkages with service providers	4.3	3.8 ----	3.6 ----	5.0 ----	5.0 ----
Information or advice on raising capital	4.0	2.5 ----	3.1 --c-	5.3 -b--	5.0 ----

Immediate Impact Scores of the GAP Segmented by Business and Consultancy Contacts

	Mean	Business and consultancy contacts			
		A. Not important	B. Somewhat important	C. Very important	D. Extremely important
Mean	5.4	4.7 --C-	5.1 --C-	6.3 AB--	5.0 ----
Strategic business information or advice	6.9	6.3 ----	7.0 ----	7.1 ----	5.0 ----
Information or advice on selling in new markets	6.6	6.3 ----	6.6 ----	7.1 ----	5.0 ----
Feedback on company products and services	5.8	5.0 ----	5.7 ----	6.3 ----	5.0 ----
Information or advice on operating in new markets	5.6	5.0 ----	5.0 --c-	7.1 -b--	5.0 ----
Business planning services	5.6	3.8 ----	5.0 --c-	7.5 -b--	5.0 ----
Executive education	4.5	3.8 ----	4.3 ----	5.0 ----	5.0 ----
Linkages with service providers	4.3	3.8 ----	4.1 ----	4.6 ----	5.0 ----
Information or advice on raising capital	4.0	3.8 ----	3.2 --c-	5.4 -b--	5.0 ----

Appendix D: Segmented Intermediate Impact Scores

In the tables below we show average intermediate impact scores (out of 10) for each measure segmented according to year the company was founded, number of employees, annual revenues, industrial sector, year of participation in GAP, GAP program value, and recommendations of the GAP program. These tables are followed by tables that show average intermediate impact scores segmented according to the outputs (service offerings) of the GAP.

Intermediate Impact Scores of the GAP Segmented by Year Company Founded

		Year Company Founded		
	Mean	A. 2001-2010	B. 1991-2000	C. 1990 or earlier
Mean	4.1	4.2 ---	4.0 ---	3.6 ---
Impact of GAP on Acquiring New International Customers	4.9	4.8 ---	5.0 ---	5.0 ---
Qualitative Impact of GAP on Change in Employment	4.3	4.6 ---	4.2 ---	3.8 ---
Impact of GAP on Export Sales Revenues	4.1	4.0 ---	4.2 ---	4.4 ---
Impact of GAP on Financing Received	3.9	4.4 ---	3.3 ---	3.1 ---
Qualitative Impact of GAP on Change in Annual Revenues	3.8	4.0 ---	4.2 ---	3.1 ---
Quantitative Impact of GAP on Change in Employment	3.7	4.0 ---	3.3 ---	3.1 ---
Quantitative Impact of GAP on Change in Annual Revenues	3.7	4.0 ---	4.2 ---	2.5 ---

Intermediate Impact Scores of the GAP Segmented by Industrial Sector

		Companies' Industrial Sector				
	Mean	A. Information & communications technolog...	B. Biotechnology, health, medical	C. Energy, environment	D. Construction	E. Manufacturing
Mean	4.0	3.8 -bCd-	4.9 a--De	5.0 A--De	2.5 aBC--	3.4 -bc--
Impact of GAP on Acquiring New International Customers	4.9	4.4 -----	6.7 -----	5.8 -----	2.5 -----	5.0 -----
Qualitative Impact of GAP on Change in Employment	4.3	4.4 -----	4.2 -----	5.0 -----	2.5 -----	3.8 -----
Impact of GAP on Export Sales Revenues	4.0	3.8 --c--	4.2 -----	5.8 a----	2.5 -----	3.8 -----
Qualitative Impact of GAP on Change in Annual Revenues	3.8	3.5 -----	4.2 -----	5.0 -----	2.5 -----	3.8 -----
Impact of GAP on Financing Received	3.8	3.3 -b---	5.8 a----	4.2 -----	2.5 -----	3.8 -----
Quantitative Impact of GAP on Change in Employment	3.7	3.8 -----	4.2 -----	5.0 -----	2.5 -----	1.3 -----
Quantitative Impact of GAP on Change in Annual Revenues	3.6	3.3 -----	5.0 -----	4.2 -----	2.5 -----	2.5 -----

Intermediate Impact Scores of the GAP Segmented by Annual Revenues

		Companies' Annual Revenues				
	Mean	A. < €500K	B. €500K-1 million	C. €1-2 million	D. €2-5 million	E. > €5 million
Mean	4.0	3.0 -BC-e	5.0 A--d-	5.1 A--DE	3.2 -bC--	3.9 a-C--
Impact of GAP on Acquiring New International Customers	4.9	4.2 -----	10.0 --c-E	5.5 -b---	3.8 -----	4.5 -B---
Qualitative Impact of GAP on Change in Employment	4.3	3.3 -----	2.5 -----	5.5 -----	3.8 -----	4.3 -----
Impact of GAP on Export Sales Revenues	4.0	2.5 -bC--	5.0 a----	5.5 A--de	2.5 --c--	4.0 --c--
Qualitative Impact of GAP on Change in Annual Revenues	3.8	2.5 -bC--	5.0 a----	5.5 A--de	2.5 --c--	3.5 --c--
Impact of GAP on Financing Received	3.8	2.5 -b-D-	5.0 a----	4.5 -----	5.0 A----	3.5 -----
Quantitative Impact of GAP on Change in Employment	3.7	3.3 -----	2.5 -----	4.5 -----	2.5 -----	3.8 -----
Quantitative Impact of GAP on Change in Annual Revenues	3.6	2.5 -b---	5.0 a----	4.5 -----	2.5 -----	3.5 -----

Intermediate Impact Scores of the GAP Segmented by Number of Employees

	Mean	Number of Employees			
		A. < 20	B. 20-50	C. 50-100	D. > 100
Mean	4.0	3.5 -B--	4.7 A--d	4.3 ----	3.6 -b--
Impact of GAP on Acquiring New International Customers	4.9	5.0 ----	5.0 ----	4.4 ----	5.0 ----
Qualitative Impact of GAP on Change in Employment	4.3	3.6 ----	5.0 ----	5.0 ----	3.8 ----
Impact of GAP on Export Sales Revenues	4.0	3.6 ----	4.6 ----	3.8 ----	4.4 ----
Qualitative Impact of GAP on Change in Annual Revenues	3.8	3.6 ----	4.6 ----	3.8 ----	3.1 ----
Impact of GAP on Financing Received	3.8	2.9 --c-	4.6 ----	5.0 a---	3.1 ----
Quantitative Impact of GAP on Change in Employment	3.7	2.9 -b--	5.0 a---	3.8 ----	3.1 ----
Quantitative Impact of GAP on Change in Annual Revenues	3.6	3.2 ----	4.2 ----	4.4 ----	2.5 ----

Intermediate Impact Scores of the GAP Segmented by Year of GAP Participation

	Mean	Year of GAP Participation	
		A. 2010	B. 2011
Mean	4.0	3.7 --	4.2 --
Impact of GAP on Acquiring New International Customers	4.9	4.3 --	5.2 --
Qualitative Impact of GAP on Change in Employment	4.3	3.9 --	4.5 --
Impact of GAP on Export Sales Revenues	4.0	3.6 --	4.3 --
Qualitative Impact of GAP on Change in Annual Revenues	3.8	3.6 --	3.9 --
Impact of GAP on Financing Received	3.8	4.3 --	3.6 --
Quantitative Impact of GAP on Change in Employment	3.7	2.9 --	4.1 --
Quantitative Impact of GAP on Change in Annual Revenues	3.6	3.2 --	3.8 --

Intermediate Impact Scores of the GAP Segmented by Program Value

	Mean	Program Value			
		A. Low	B. Fair	C. High	D. Very high
Mean	**4.0**	**2.5** **-B-D**	**3.8** **A--D**	**3.6** **---D**	**5.4** **ABC-**
Impact of GAP on Acquiring New International Customers	**4.9**	**2.5** **-B--**	**5.0** **A---**	**4.8** **----**	**5.5** **----**
Qualitative Impact of GAP on Change in Employment	**4.3**	**2.5** **----**	**4.4** **----**	**3.6** **---d**	**6.0** **--c-**
Impact of GAP on Export Sales Revenues	**4.0**	**2.5** **----**	**4.4** **----**	**3.4** **---D**	**5.5** **--C-**
Qualitative Impact of GAP on Change in Annual Revenues	**3.8**	**2.5** **----**	**4.4** **----**	**3.4** **----**	**4.5** **----**
Impact of GAP on Financing Received	**3.8**	**2.5** **----**	**2.5** **----**	**4.1** **----**	**4.5** **----**
Quantitative Impact of GAP on Change in Employment	**3.7**	**2.5** **----**	**3.1** **---d**	**2.7** **---D**	**6.5** **-bC-**
Quantitative Impact of GAP on Change in Annual Revenues	**3.6**	**2.5** **----**	**3.1** **----**	**3.2** **----**	**5.0** **----**

Intermediate Impact Scores of the GAP Segmented by Recommendations

	Mean	Recommendations for GAP			
		A. Will not recommend	B. Intend to in future	C. 1 or 2	D. 3 or more
Mean	**4.0**	**2.5** **---D**	**3.3** **---D**	**3.5** **---D**	**4.7** **ABC-**
Impact of GAP on Acquiring New International Customers	**4.9**	**2.5** **----**	**5.0** **----**	**4.6** **----**	**5.3** **----**
Qualitative Impact of GAP on Change in Employment	**4.3**	**2.5** **----**	**2.5** **---D**	**3.6** **---d**	**5.5** **-Bc-**
Impact of GAP on Export Sales Revenues	**4.0**	**2.5** **----**	**3.3** **----**	**3.6** **----**	**4.8** **----**
Qualitative Impact of GAP on Change in Annual Revenues	**3.8**	**2.5** **----**	**3.3** **----**	**3.6** **----**	**4.3** **----**
Impact of GAP on Financing Received	**3.8**	**2.5** **----**	**3.3** **----**	**3.9** **----**	**4.0** **----**
Quantitative Impact of GAP on Change in Employment	**3.7**	**2.5** **----**	**2.5** **----**	**2.5** **---d**	**5.0** **--c-**
Quantitative Impact of GAP on Change in Annual Revenues	**3.6**	**2.5** **----**	**3.3** **----**	**2.9** **----**	**4.3** **----**

Intermediate Impact Scores of the GAP Segmented by Primary Research

	Mean	Primary research (100+ interviews)			
		A. Not important	B. Somewhat important	C. Very important	D. Extremely important
Mean	4.0	- ----	3.6 ----	3.6 ---D	4.6 --C-
Impact of GAP on Acquiring New International Customers	4.9	- -B--	5.0 A---	4.5 ----	5.3 ----
Qualitative Impact of GAP on Change in Employment	4.3	- -B--	3.8 A---	3.9 ----	5.0 ----
Impact of GAP on Export Sales Revenues	4.0	- -B--	3.8 A---	3.6 ----	4.7 ----
Qualitative Impact of GAP on Change in Annual Revenues	3.8	- -B--	3.8 A---	3.4 ----	4.4 ----
Impact of GAP on Financing Received	3.8	- -B--	3.8 A---	3.4 ----	4.4 ----
Quantitative Impact of GAP on Change in Employment	3.7	- -B--	1.3 A---	3.6 ----	4.4 ----
Quantitative Impact of GAP on Change in Annual Revenues	3.6	- -B--	3.8 A---	3.0 ----	4.4 ----

Intermediate Impact Scores of the GAP Segmented by
Interpretation and Analysis of Research Findings

	Mean	Interpretation and analysis of research findings			
		A. Not important	B. Somewhat important	C. Very important	D. Extremely important
Mean	4.1	- ----	3.9 ---D	3.4 ---D	5.9 -BC-
Impact of GAP on Acquiring New International Customers	4.9	- -B--	3.8 A---	4.2 ---D	7.0 --C-
Qualitative Impact of GAP on Change in Employment	4.4	- -B--	5.0 A---	3.8 ----	5.5 ----
Impact of GAP on Export Sales Revenues	4.1	- -B--	3.8 A---	3.7 ---d	5.5 --c-
Qualitative Impact of GAP on Change in Annual Revenues	3.9	- -B--	3.8 A---	3.3 ---D	5.5 --C-
Impact of GAP on Financing Received	3.9	- -B--	2.5 A--d	3.1 ---D	6.5 -bC-
Quantitative Impact of GAP on Change in Employment	3.8	- -B--	5.0 A---	2.9 ---d	5.5 --c-
Quantitative Impact of GAP on Change in Annual Revenues	3.6	- -B--	3.8 A---	2.7 ---D	6.0 --C-

Intermediate Impact Scores of the GAP Segmented by Executive Education

		Executive education			
	Mean	A. Not important	B. Somewhat important	C. Very important	D. Extremely important
Mean	4.1	3.0 --Cd	3.7 --c-	4.6 Ab--	5.0 a---
Impact of GAP on Acquiring New International Customers	4.9	3.8 ----	4.2 ---D	5.3 ---d	10.0 -Bc-
Qualitative Impact of GAP on Change in Employment	4.4	3.8 ----	4.4 ----	4.7 ----	2.5 ----
Impact of GAP on Export Sales Revenues	4.1	2.5 ----	3.9 ----	4.7 ----	5.0 ----
Qualitative Impact of GAP on Change in Annual Revenues	3.9	2.5 ----	3.6 ----	4.4 ----	5.0 ----
Impact of GAP on Financing Received	3.9	2.5 ----	3.1 --c-	5.0 -b--	5.0 ----
Quantitative Impact of GAP on Change in Employment	3.8	3.8 ----	3.9 ----	3.8 ----	2.5 ----
Quantitative Impact of GAP on Change in Annual Revenues	3.6	2.5 ----	3.1 ----	4.4 ----	5.0 ----

Intermediate Impact Scores of the GAP Segmented by Business and Consultancy Contacts

		Business and consultancy contacts			
	Mean	A. Not important	B. Somewhat important	C. Very important	D. Extremely important
Mean	4.1	2.9 -bCD	3.9 a-c-	4.7 Ab--	5.0 A---
Impact of GAP on Acquiring New International Customers	4.9	3.8 ----	4.3 ---D	5.4 ----	10.0 -B--
Qualitative Impact of GAP on Change in Employment	4.4	2.5 ----	4.5 ----	5.0 ----	2.5 ----
Impact of GAP on Export Sales Revenues	4.1	2.5 ----	4.1 ----	4.6 ----	5.0 ----
Qualitative Impact of GAP on Change in Annual Revenues	3.9	2.5 ----	3.6 ----	4.6 ----	5.0 ----
Impact of GAP on Financing Received	3.9	3.8 ----	3.2 ----	5.0 ----	5.0 ----
Quantitative Impact of GAP on Change in Employment	3.8	2.5 ----	4.1 ----	3.8 ----	2.5 ----
Quantitative Impact of GAP on Change in Annual Revenues	3.6	2.5 ----	3.2 ----	4.6 ----	5.0 ----

Appendix E: The Evidence Network Principals

Brian Barge, President & CEO, The Evidence Network
Brian Barge is co-founder, President and CEO of The Evidence Network. Brian brings significant executive experience and practical knowledge of innovation intermediaries to the company. He has served as President & CEO of three leading innovation intermediaries in Canada: CMC Microsystems (2000-2007), the Ottawa Economic Development Corporation (1996-2000), and the Alberta Research Council (1991-1996). Brian began his career as a scientist with the ARC and focused on linking scientific and technological developments to commercial practice, often in a global context. Over his 35-year career in research management and economic development, Brian has forged numerous innovative initiatives among universities, industries and governments that have stimulated the formation and growth of countless technology-intensive companies. He has served on the Board of Directors of over 15 innovation-enabling organizations. Brian has degrees in physics (BA, University of Saskatchewan) and meteorology (McGill, MSc & PhD).

Margaret Dalziel, VP Research, The Evidence Network
Margaret Dalziel is co-founder and VP Research of The Evidence Network, and an Associate Professor of the Telfer School of Management at the University of Ottawa. Margaret conducts research in innovation and entrepreneurship and has published or presented over 60 articles, including over 25 articles related to innovation intermediaries. Margaret has 15 years experience in technology development and research management prior to becoming an academic and has degrees in computer science (BSc, McGill), and business (MBA, McGill; PhD, UQAM).