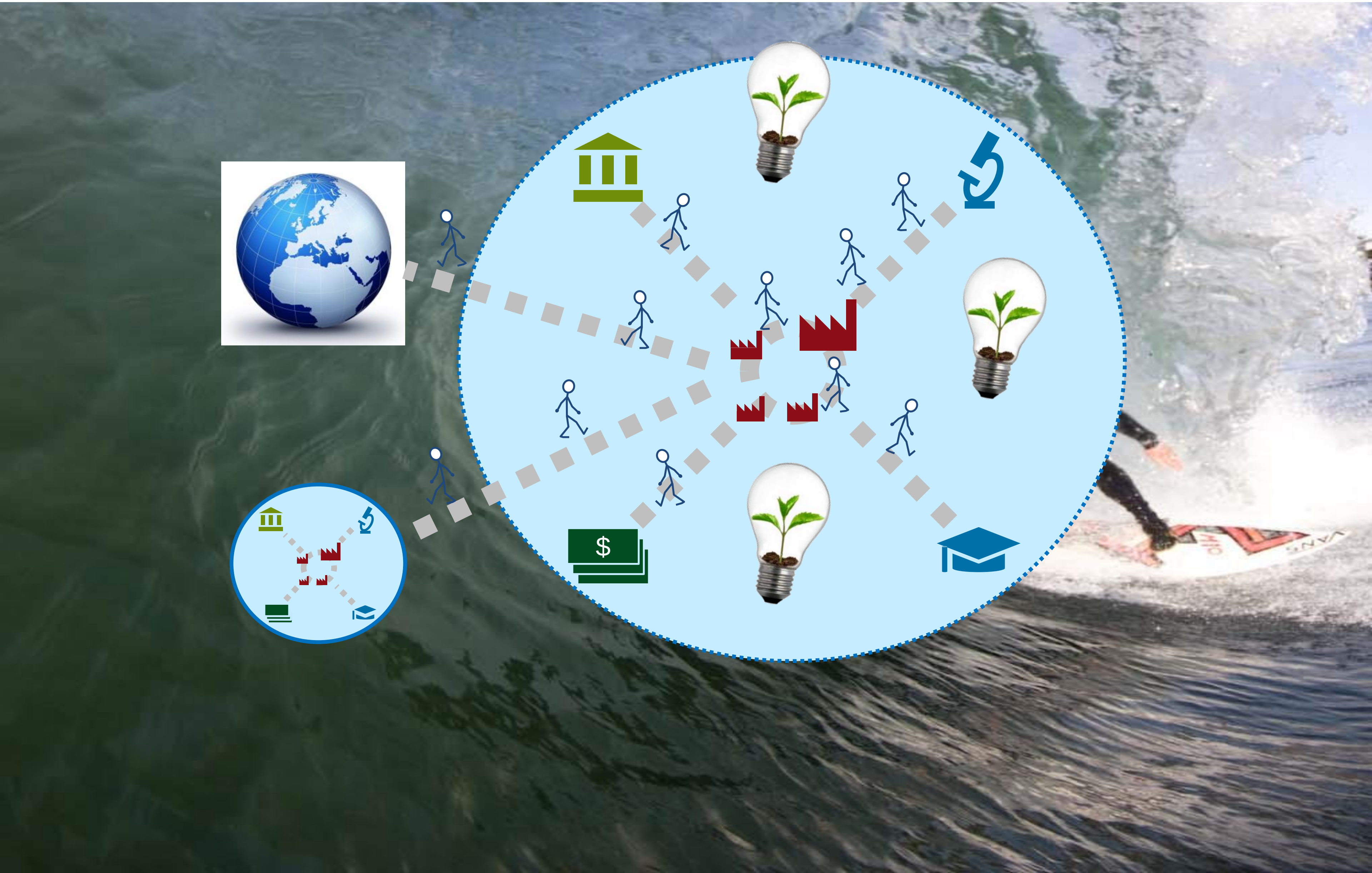
Effekter av organiserade kluster

SLIM III - 2013

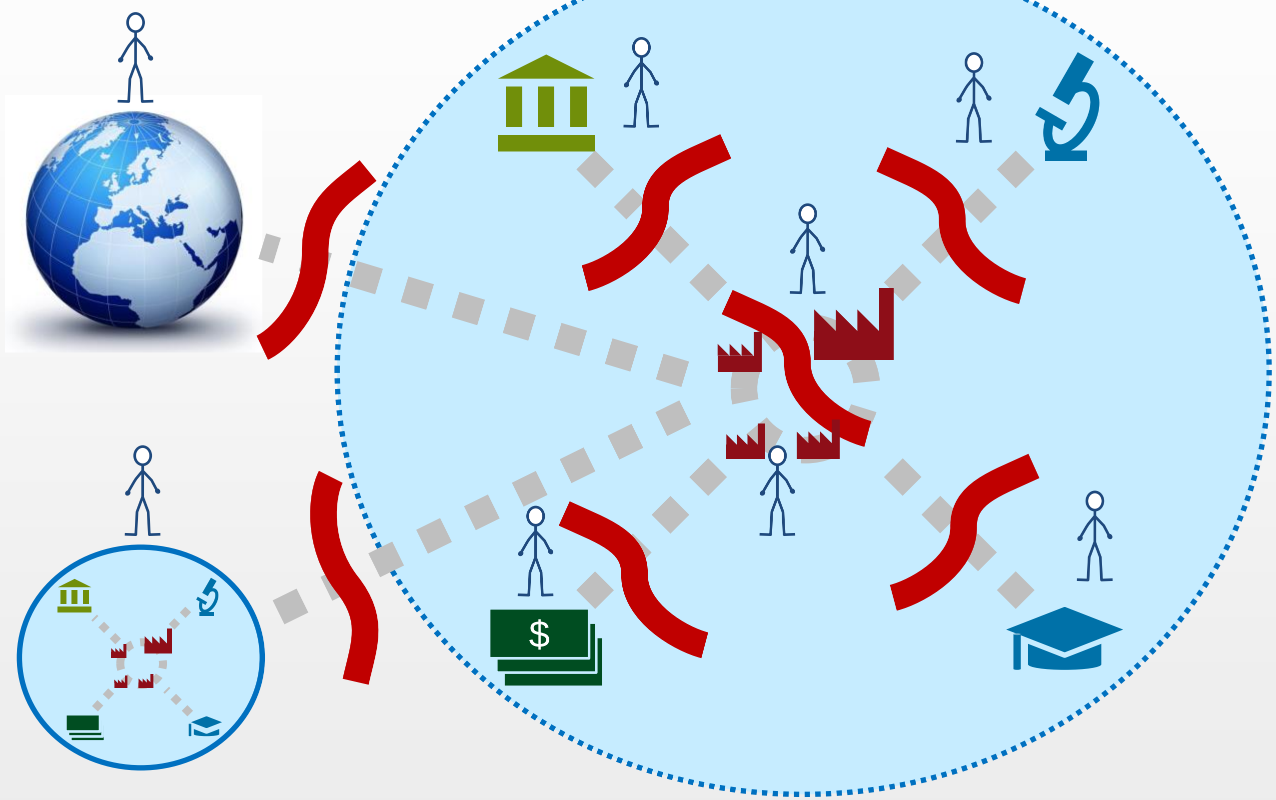
Örjan Sölvell

Anna Löfmarck
Mats Williams
Håkan Wolgast

Drömmen om dynamiska kluster…



… och verkligheten = många gap



Regionalpolitik
Innovationspolitik
Näringspolitik

Sektor/teknik	Fåtal gap	Många gap
Övergripande		
Specifik		

Brobyggare

Sektor/teknik	Fåtal gap	Många gap
Övergripande	Teknikparker Holdingbolag Innovationskontor	KK-stiftelsen Innovationsbron ALMI Regionala riskkapitalbolag
Specifik	Inkubatorer RISE Forsknings- institut	Klusterorganisationer

Brobyggare

Sektor/teknik	Fåtal gap	Många gap
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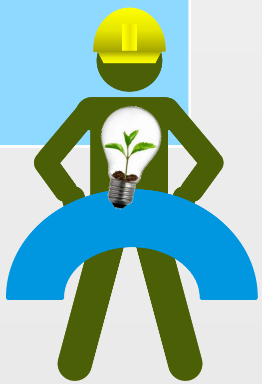


Resultat av utvärderingen
12 organiserade kluster

SLIM III

SLIM III - Analysnivåer

North Mid Sweden

Region

Region Red

Region Green

Region Blue

Cluster

Alpha
Bravo
Charlie
Delta
Echo
Foxtrot
Golf
Hotel
India
Juliett
Kilo
Lima

SLIM III - Mätmetoder

SIMPLER
Firm Financial Performance

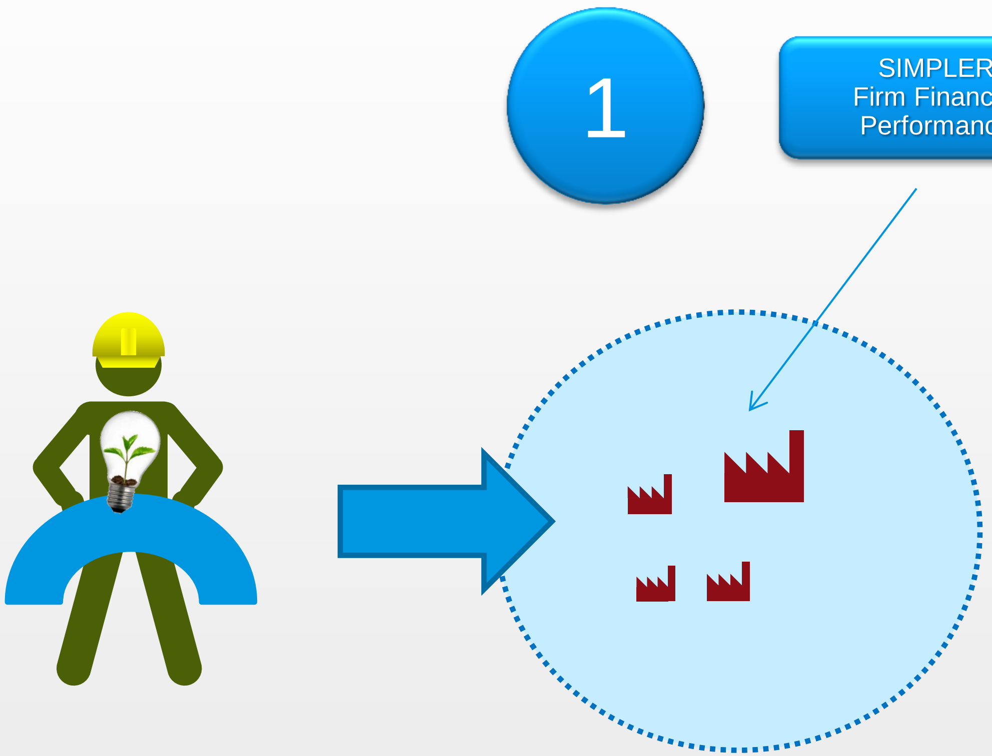
SLIM III - Mätmetoder

SIMPLER
Firm Financial Performance

Surveys
Firm General Performance

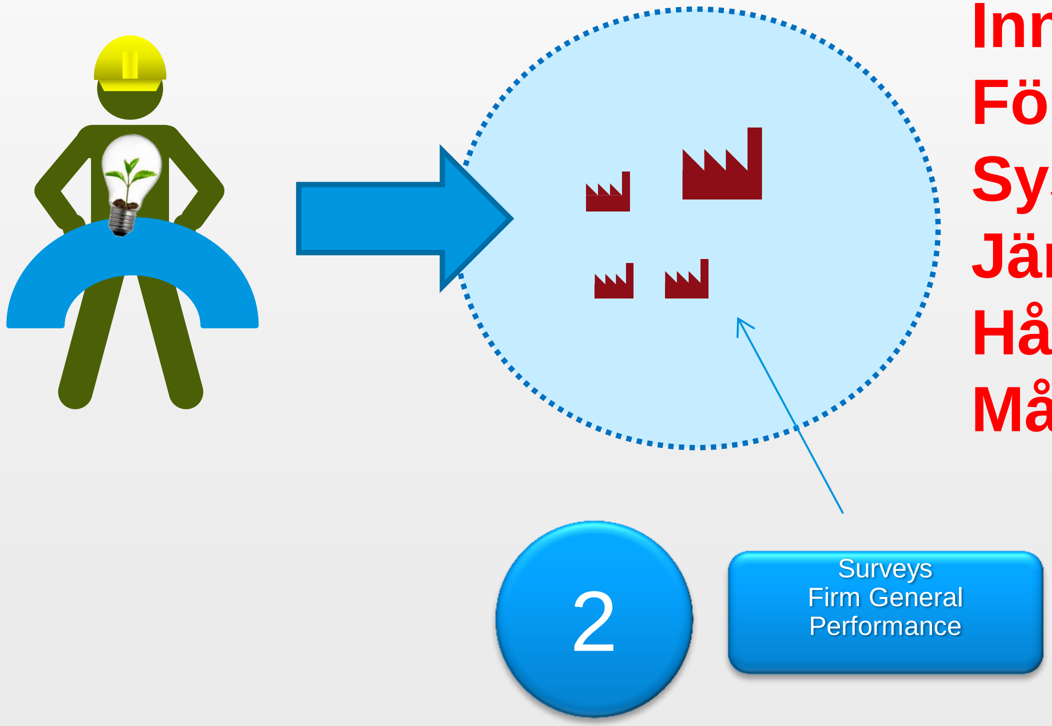
Surveys
Innovation Gap Performance

Utvärdering av organiserade klusters långsiktiga effekter på medverkande *företag*



Konkurrenskraft
Förädlingsvärde
Lönsamhet
Produktivitet

Utvärdering av organiserade klusters långsiktiga effekter på medverkande *företag*

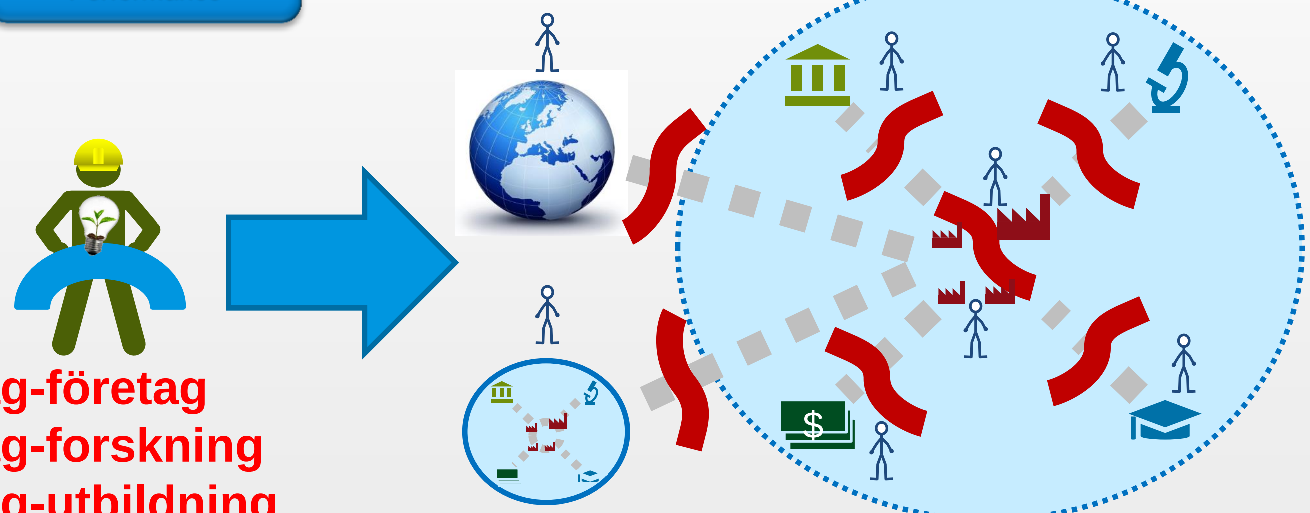


Innovationsförmåga
Försäljning
Sysselsättning
Jämställdhet
Hållbarhet
Mångfald

Utvärdering av organiserade klusters långsiktiga effekter på de 7 *innovationsgapen*

3

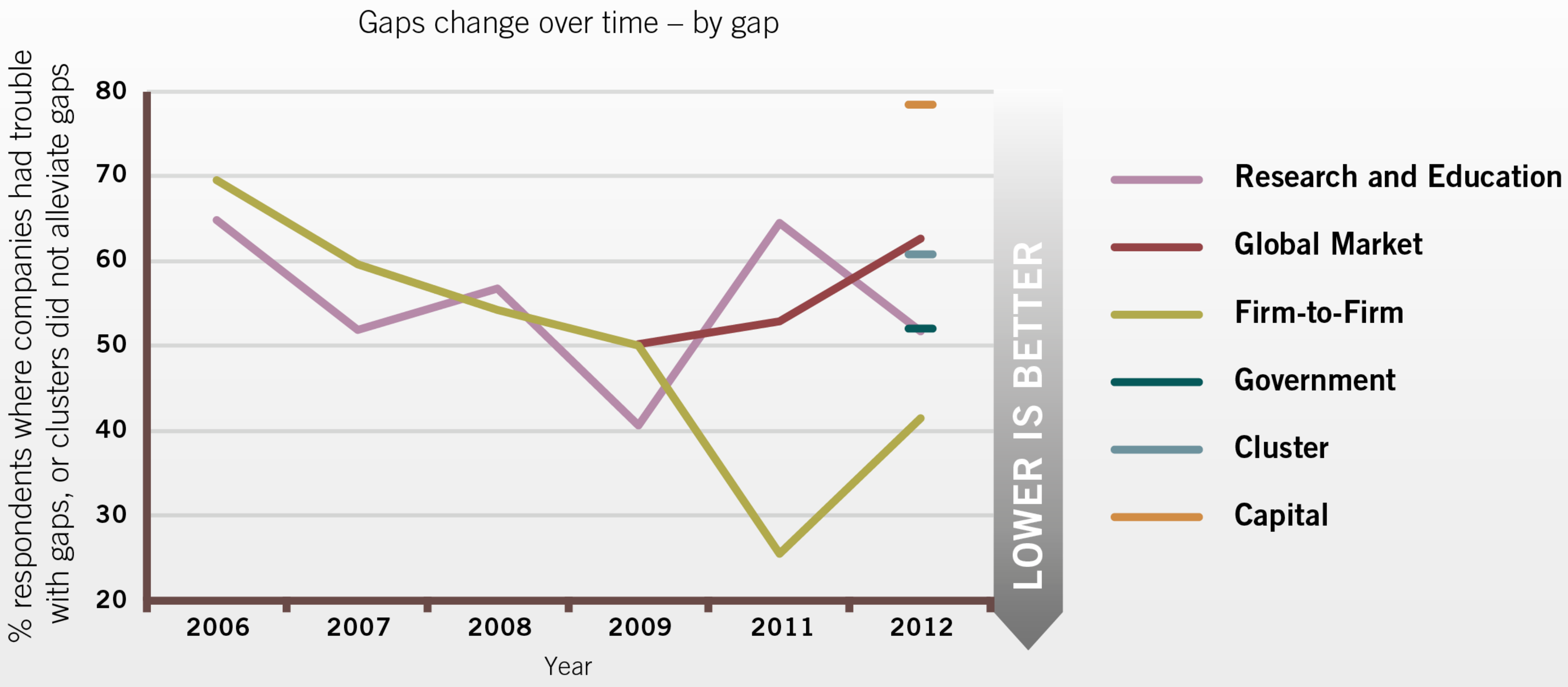
Surveys
Innovation Gap
Performance



Företag-företag
Företag-forskning
Företag-utbildning
Företag-kapital
Företag-offentliga
Företag-global
Företag-kluster

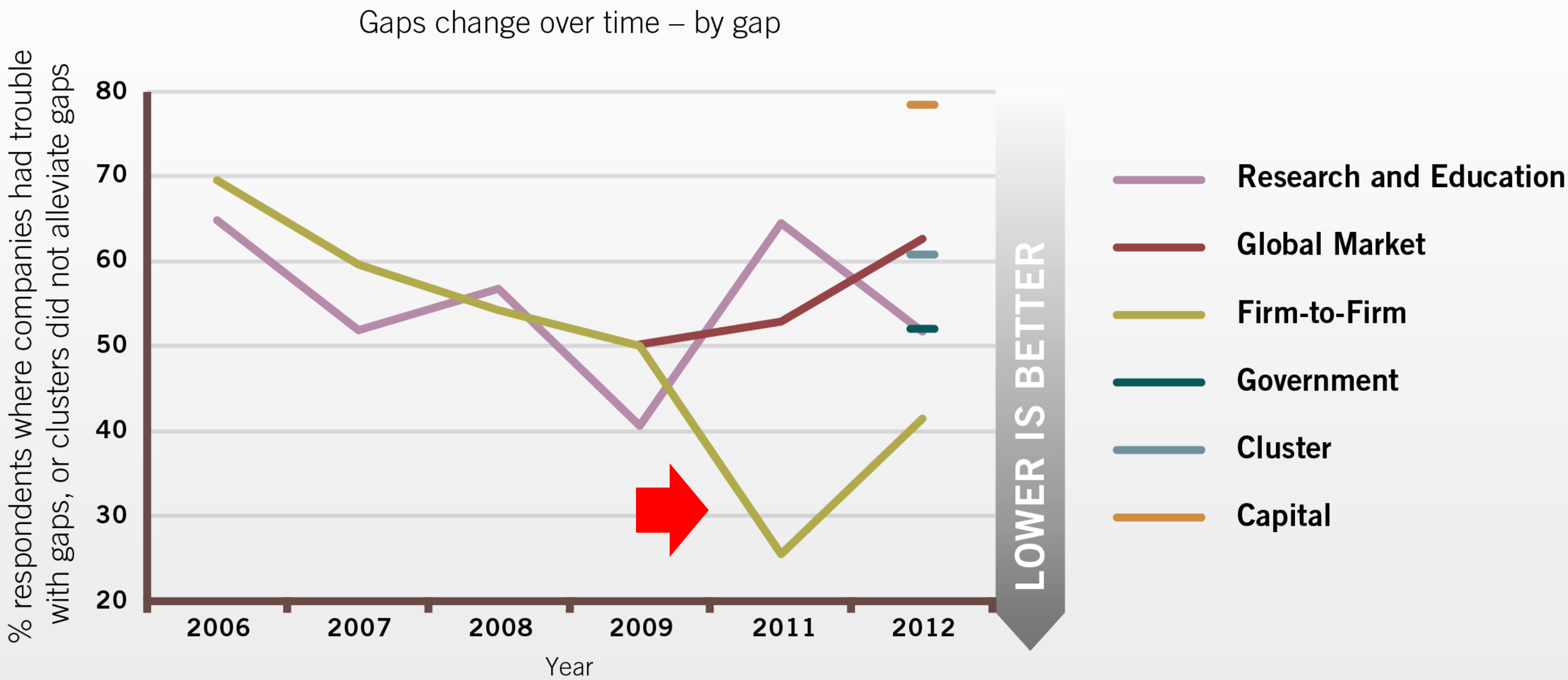
Innovation Gaps
All clusters

3



Innovation Gaps
All clusters

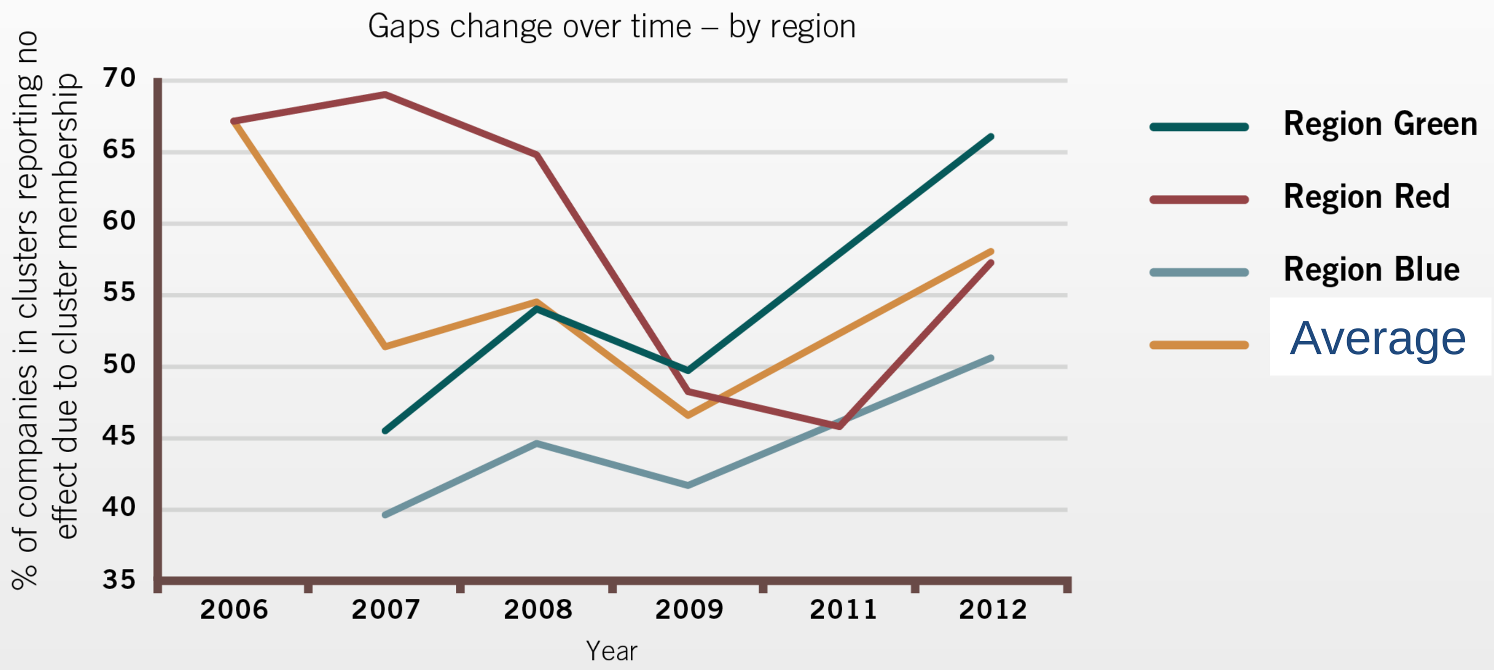
3



Sjunkande trend i firm-to-firm gapet
Har det vänt efter krisen – ökar gapen?
Kapitalgapet störst

Innovation Gaps per Region
Sum of 6 gaps

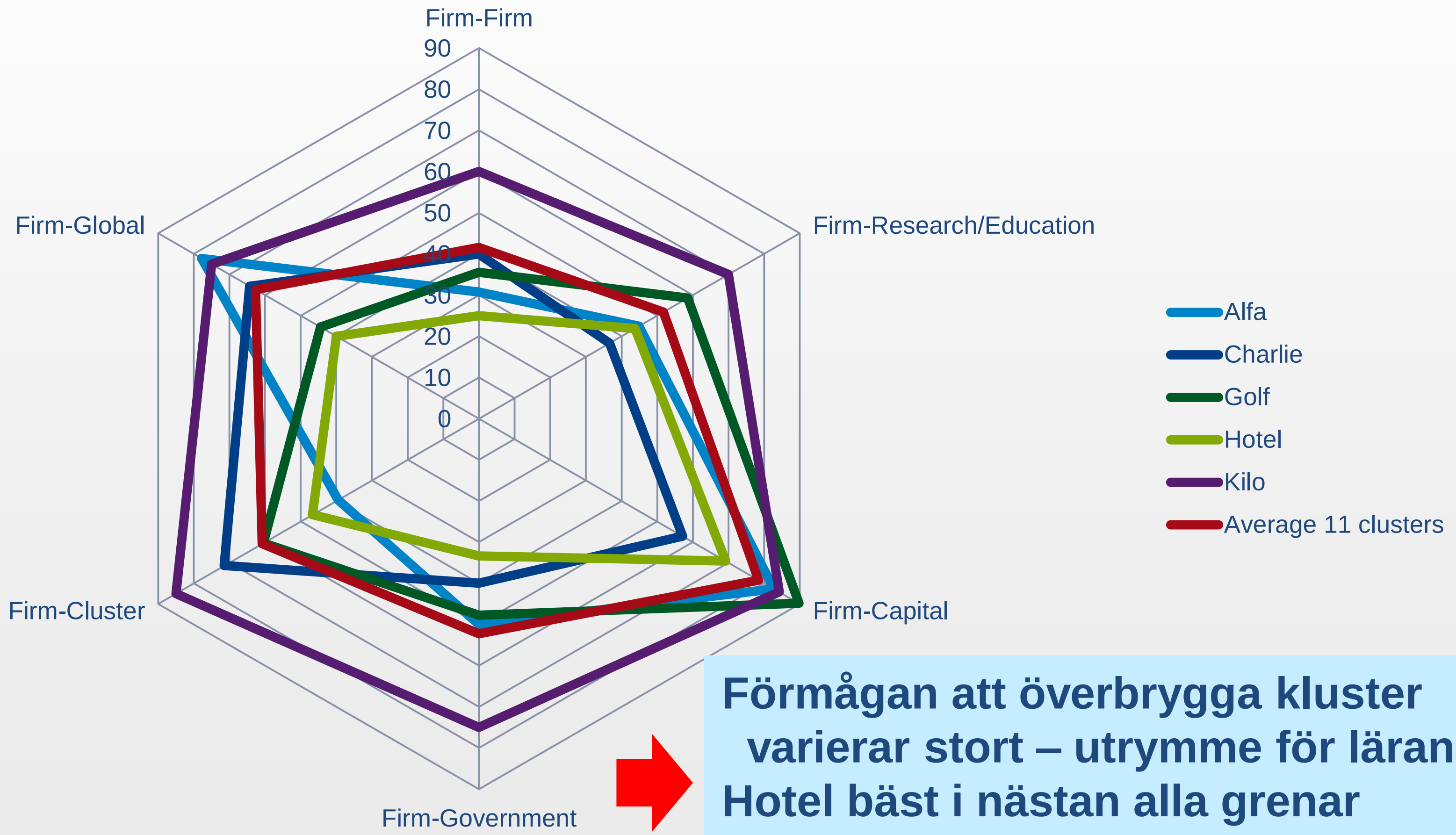
3



Blå och grön region: gapen stiger!
Röd region – klara förbättringar fom 2008

Innovation Gaps per Cluster

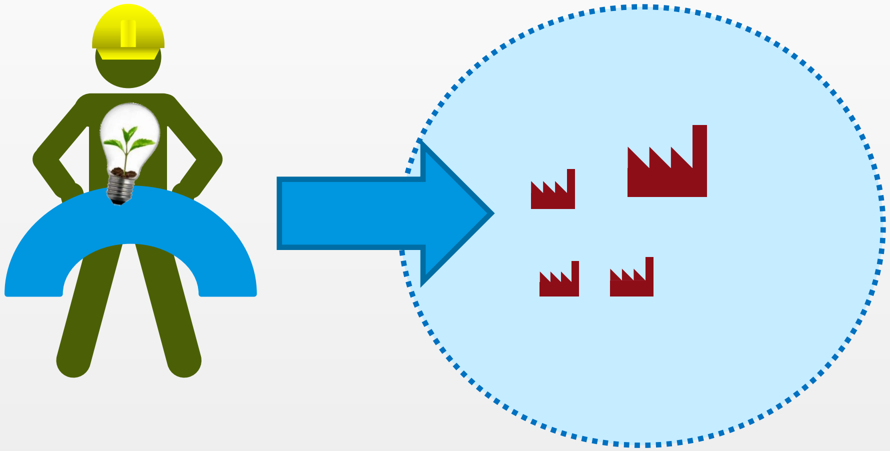
3



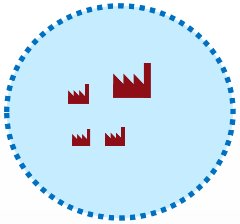
Förmågan att överbrygga kluster varierar stort – utrymme för lärande
Hotel bäst i nästan alla grenar
Kilo stor förbättringspotential

General Firm Performance
North Mid Sweden
2005 - 2012

2



General Firm Performance North Mid Sweden 2005 - 2012



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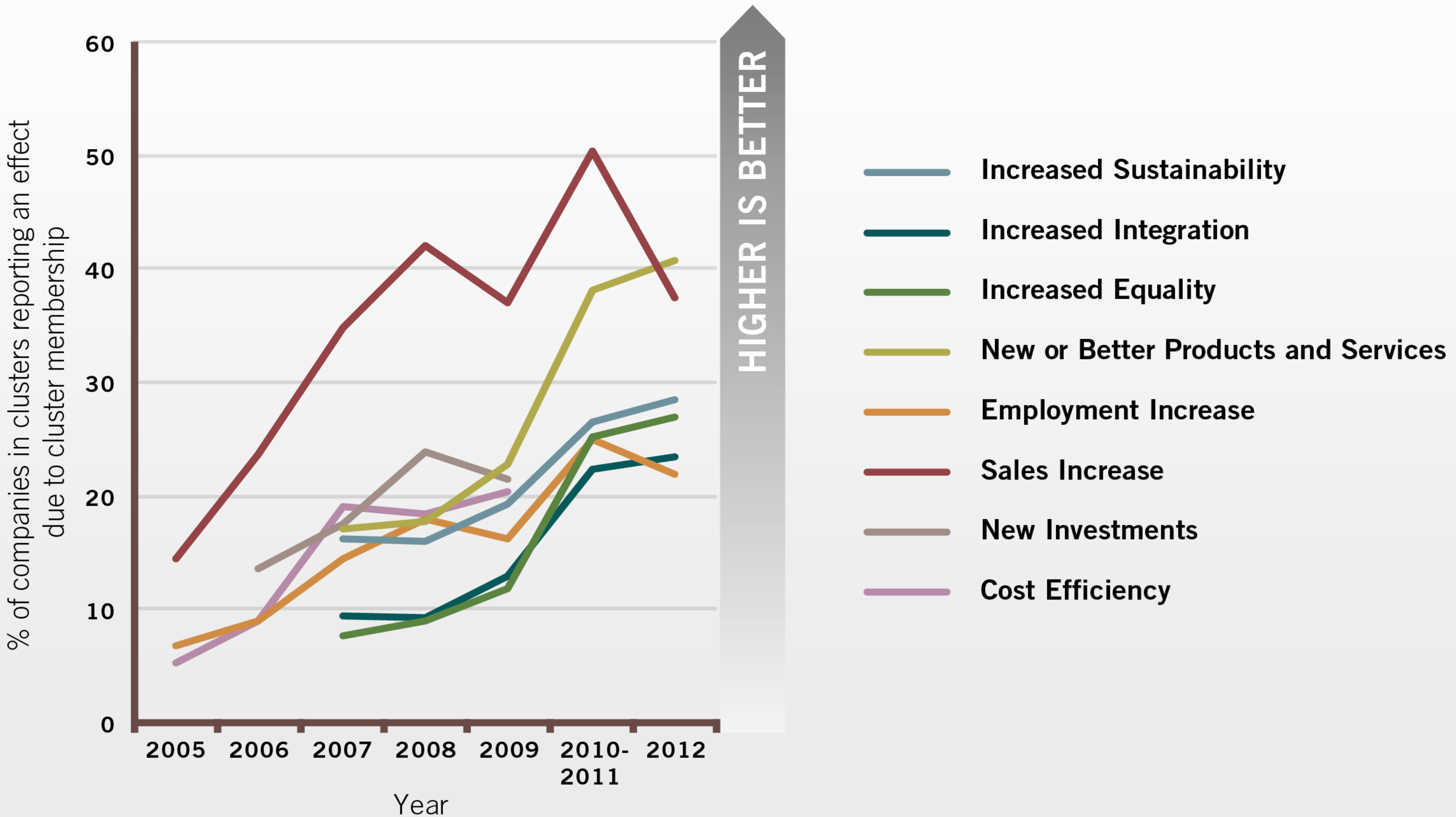
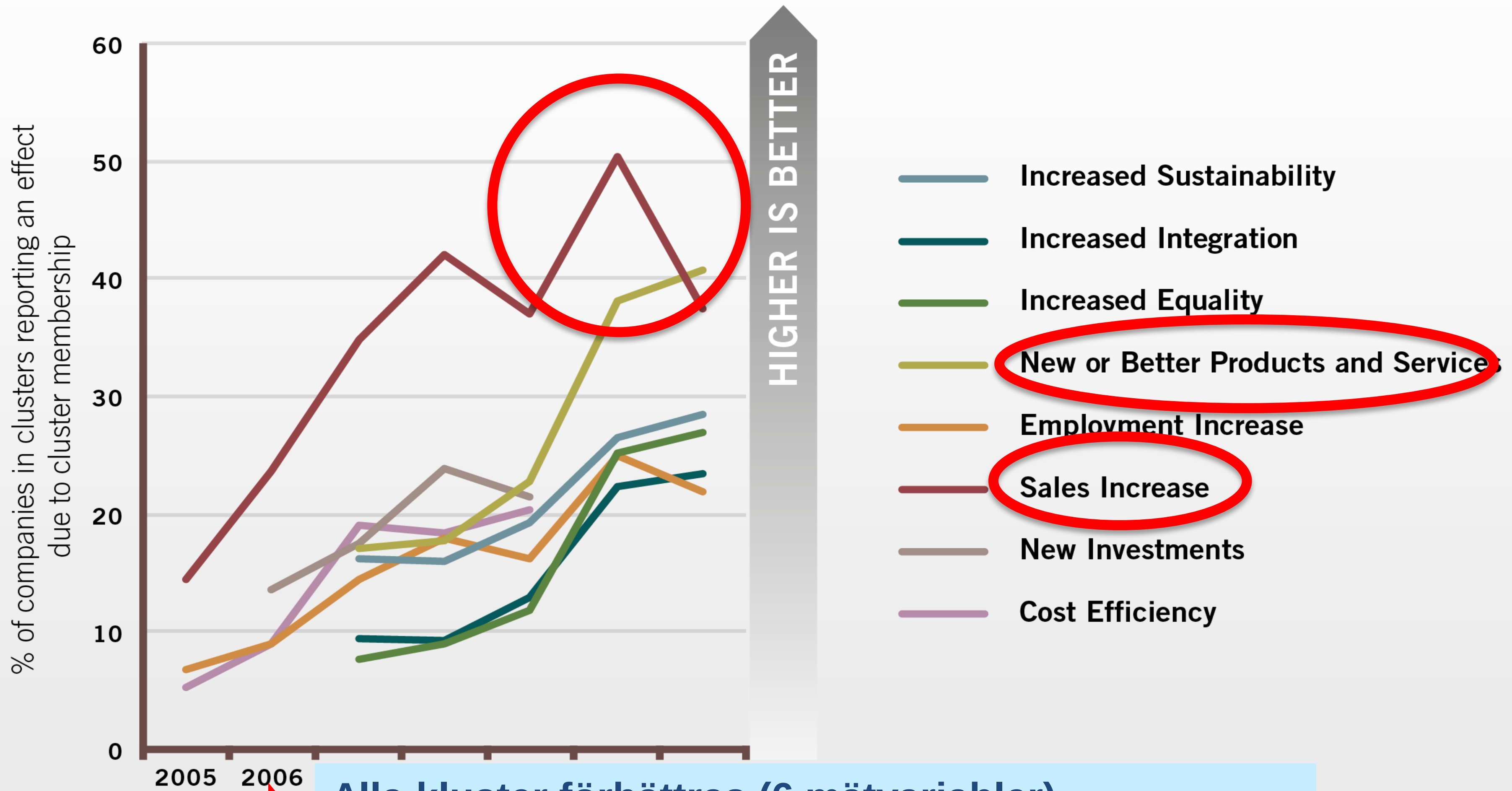


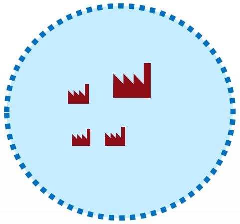
General Firm Performance
North Mid Sweden
2005 - 2012

2



Alla kluster förbättras (6 mätvariabler)
Störst effekt på försäljning och innovationsarbetet

General Performance per Region
Equality
2007 - 2012



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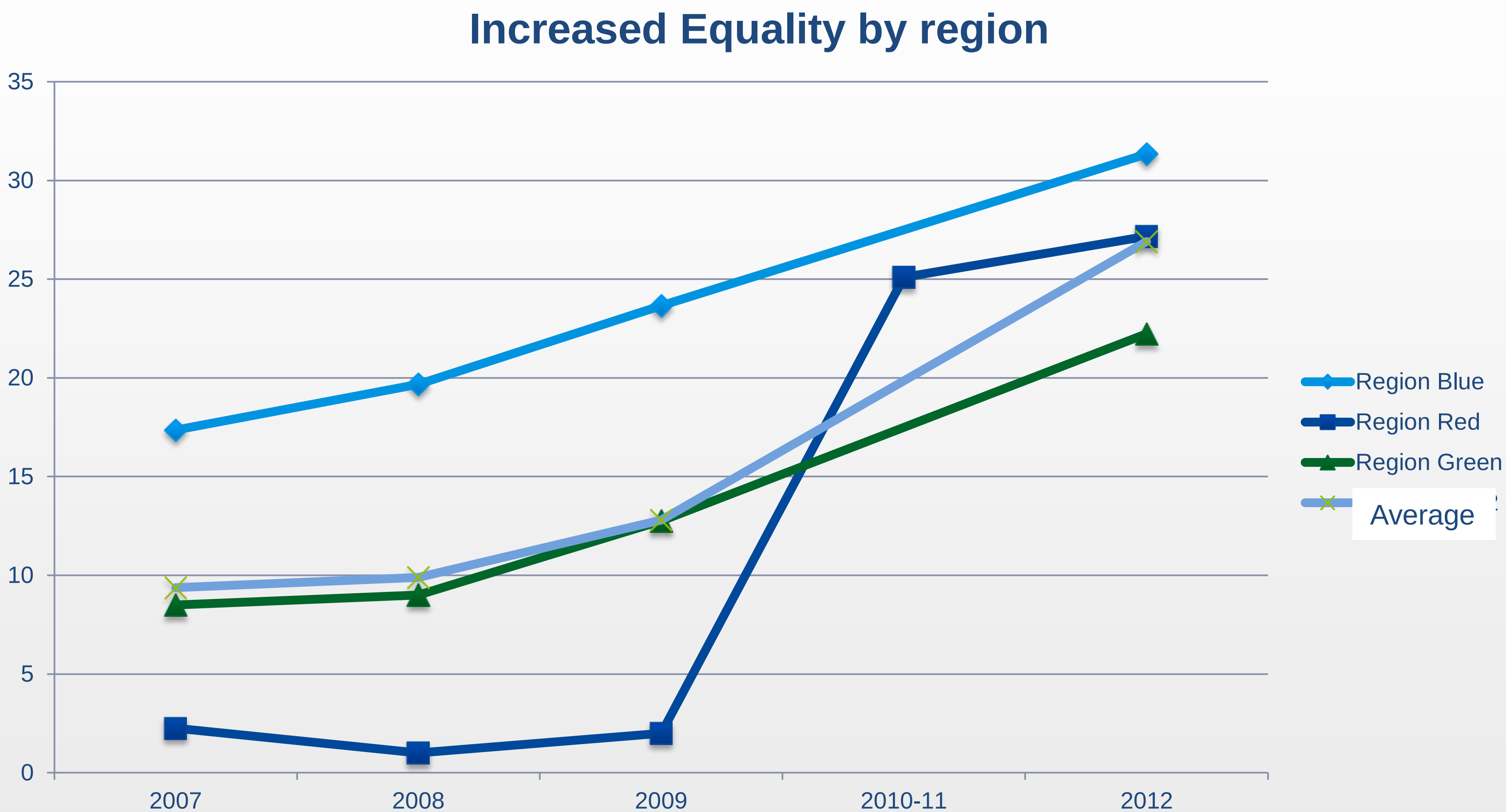
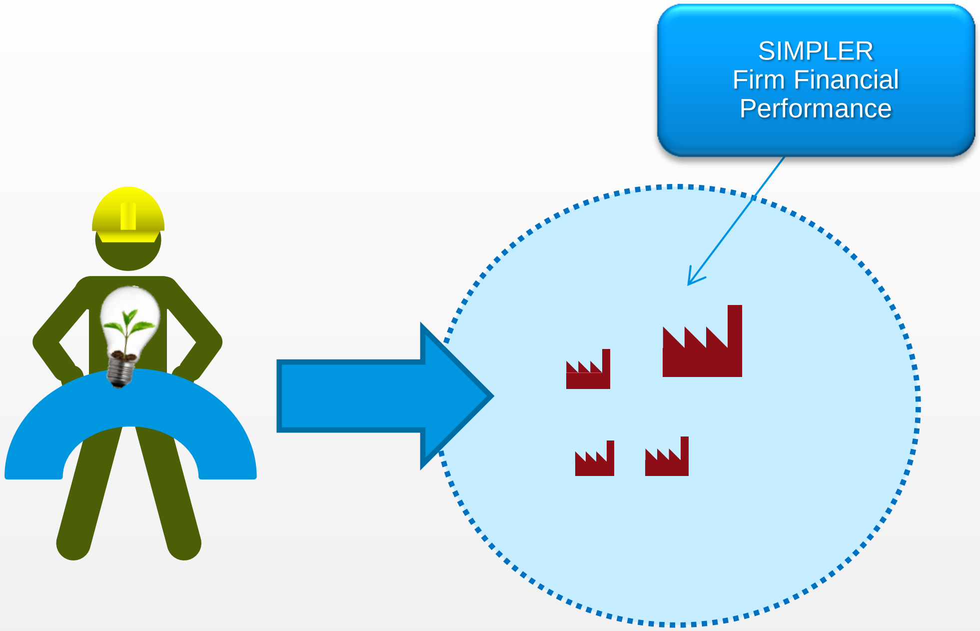


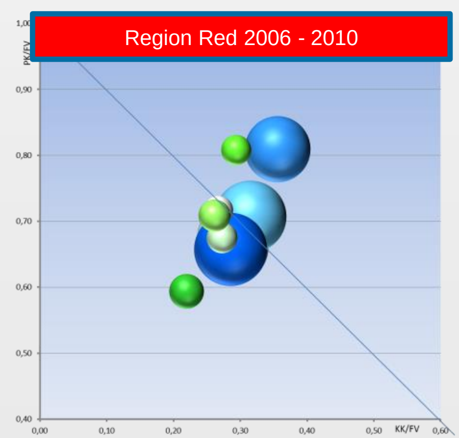
Klar förbättring på 5 år för alla regioner
Region röd stor upphämtning
Regionerna ligger ganska lika (region grön lite under)

SIMPLER Analysis

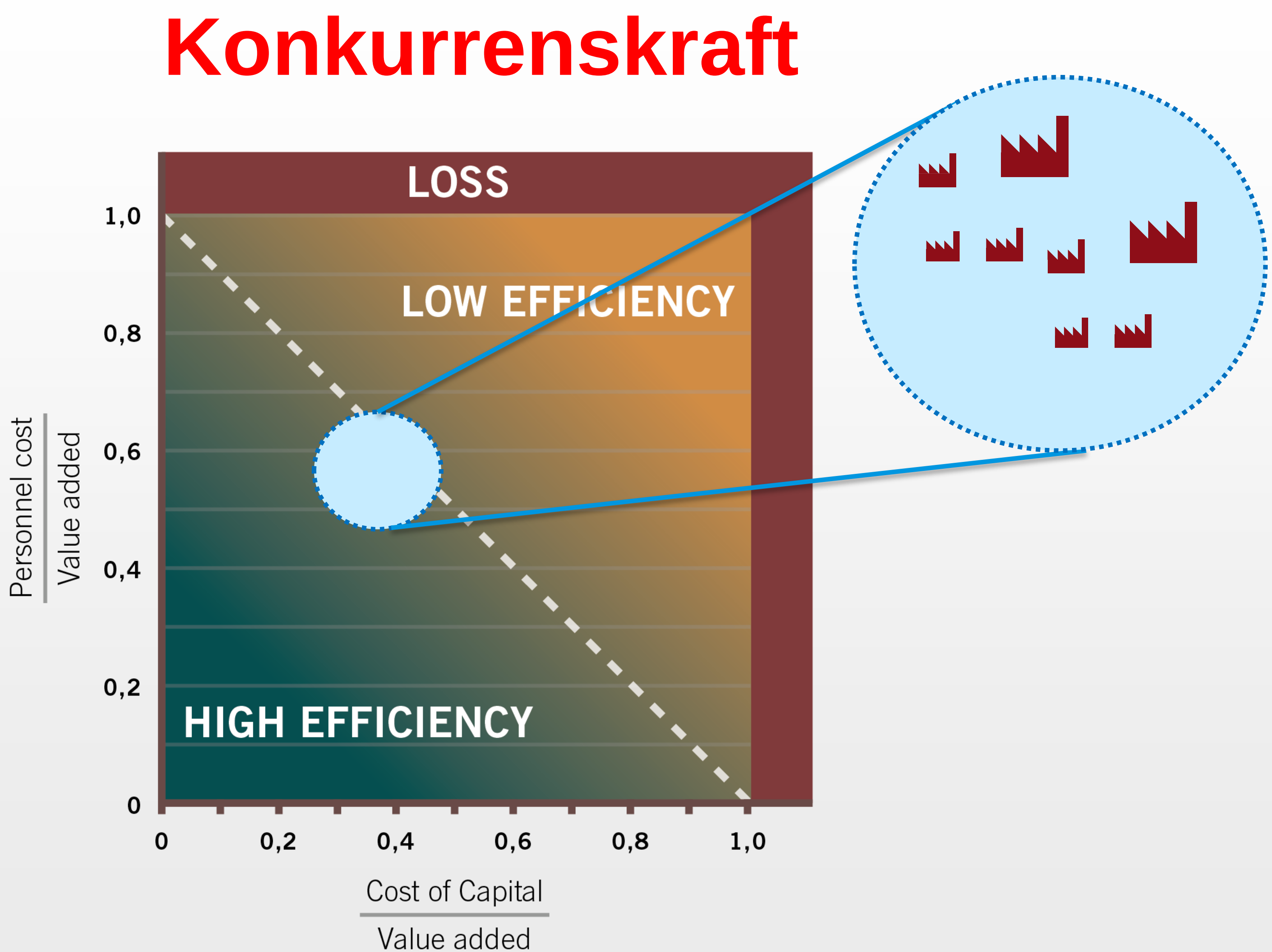
1

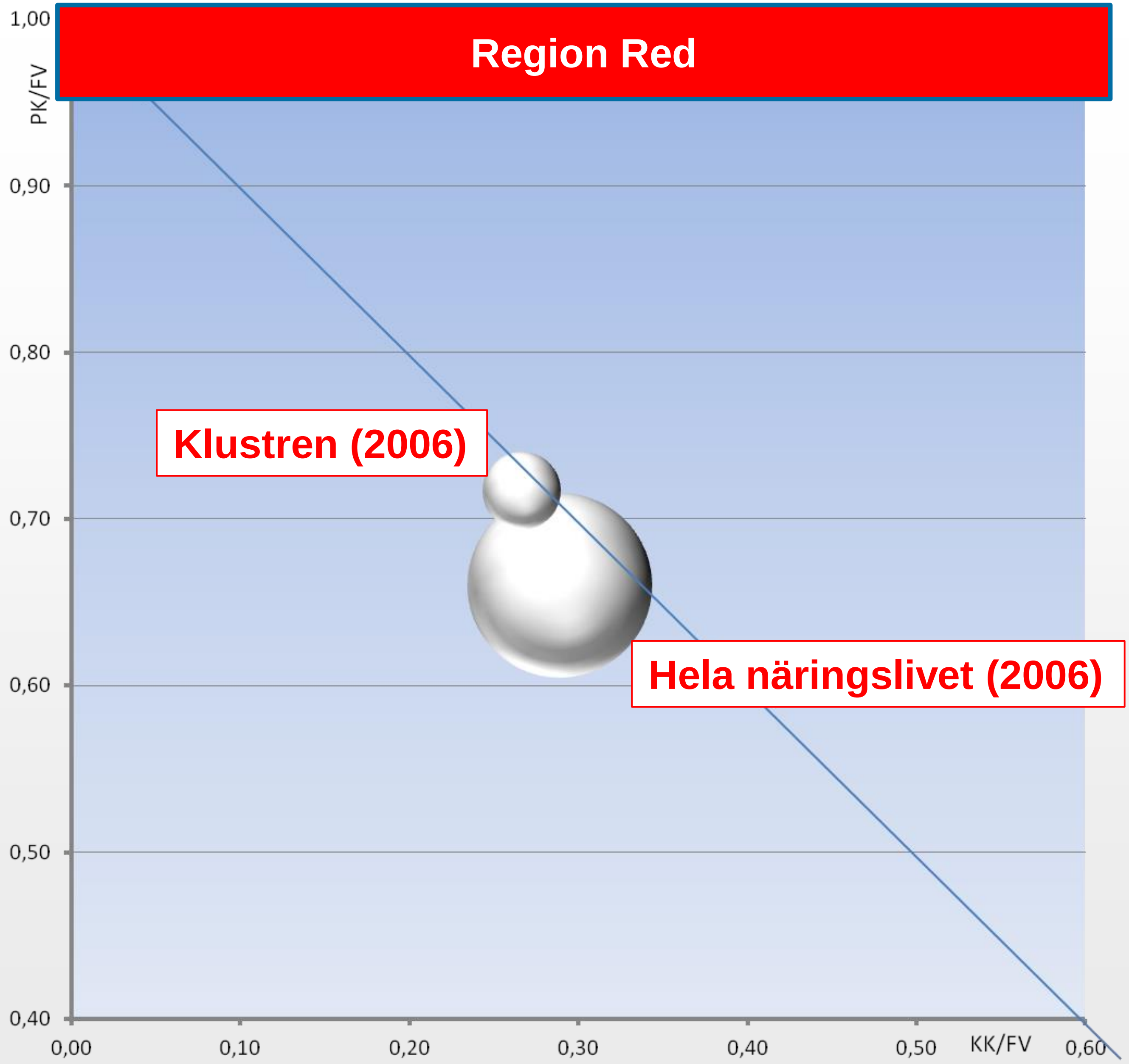


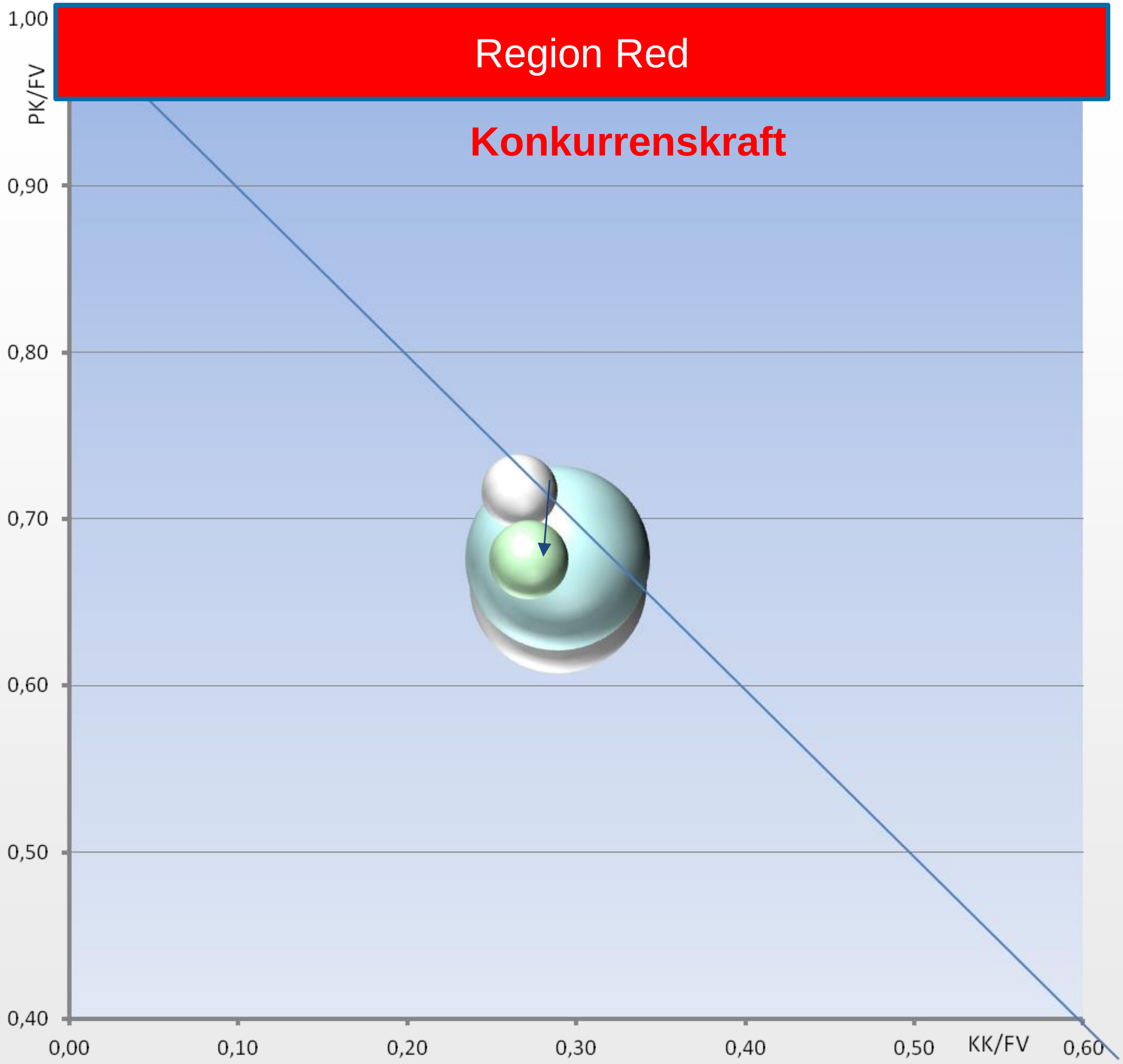
Konkurrenskraft
Förädlingsvärde
Lönsamhet
Produktivitet

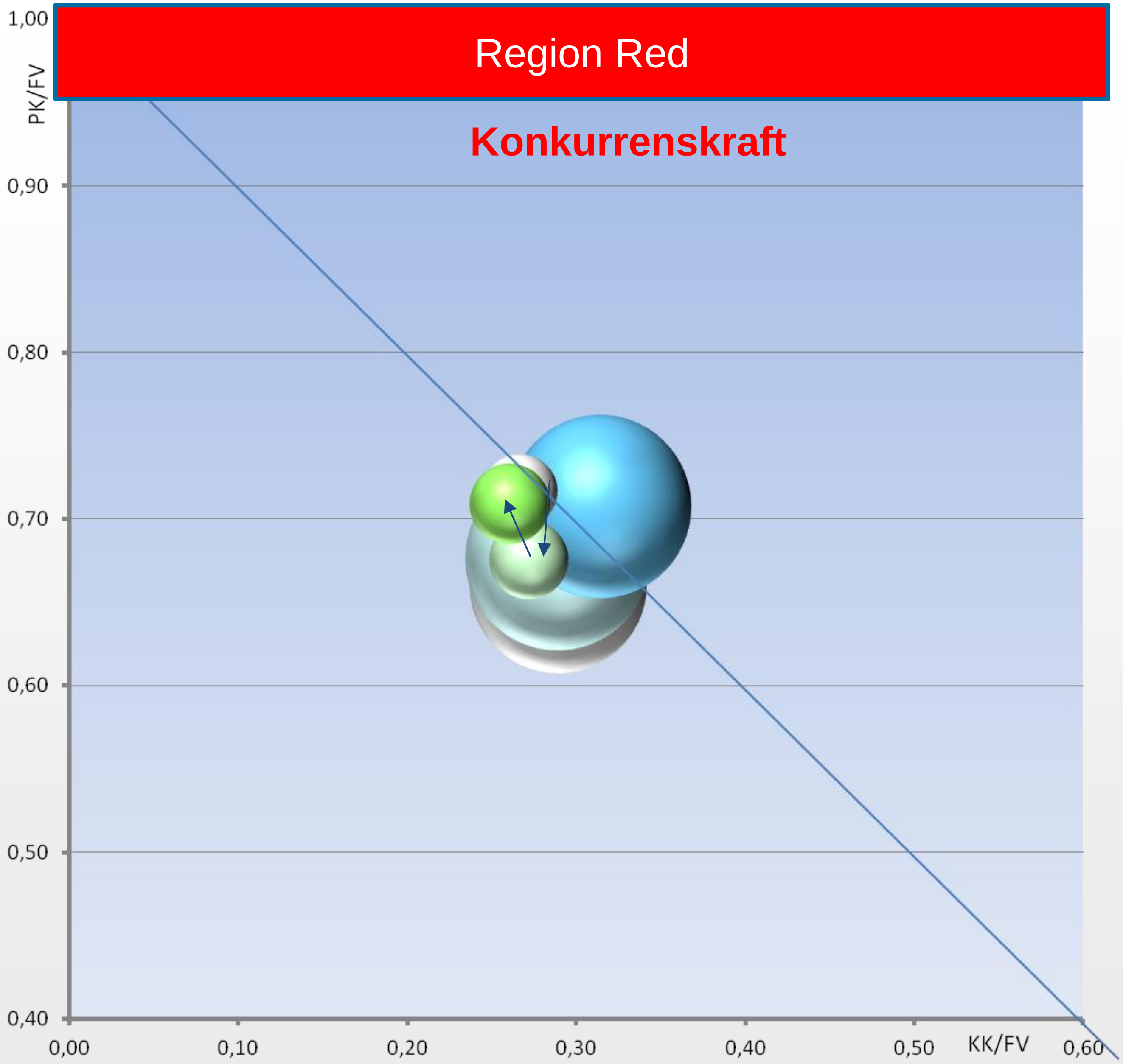


SIMPLER Diagram

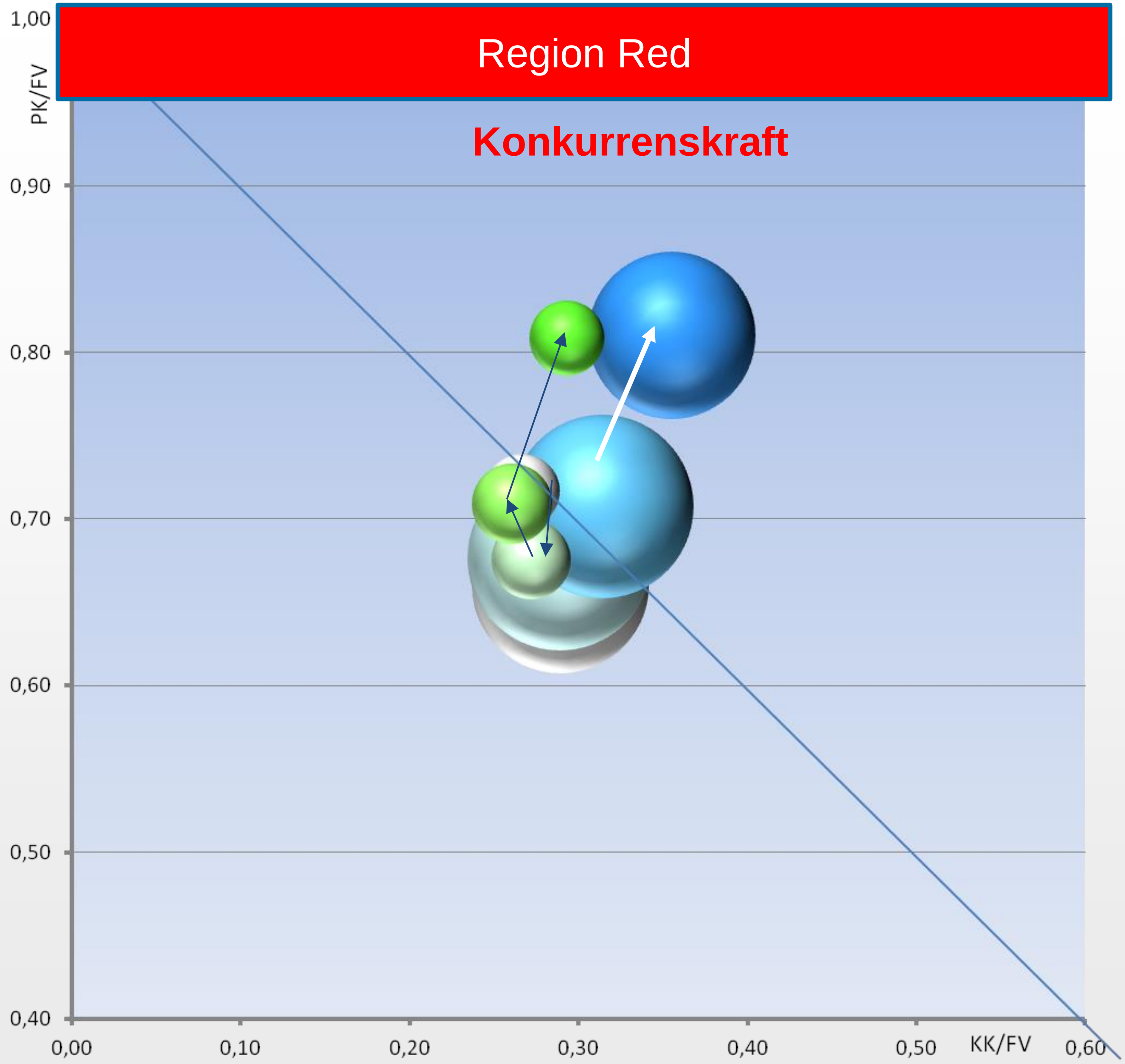



Region Red
PK/FV
1,00
0,90
0,80
0,70
0,60
0,50
0,40
Klustren (2006)
Hela näringslivet (2006)
0,00
0,10
0,20
0,30
0,40
0,50
KK/FV
0,60


Region Red
Konkurrenskraft
PK/FV
1,00
0,90
0,80
0,70
0,60
0,50
0,40
0,00
0,10
0,20
0,30
0,40
0,50
KK/FV
0,60

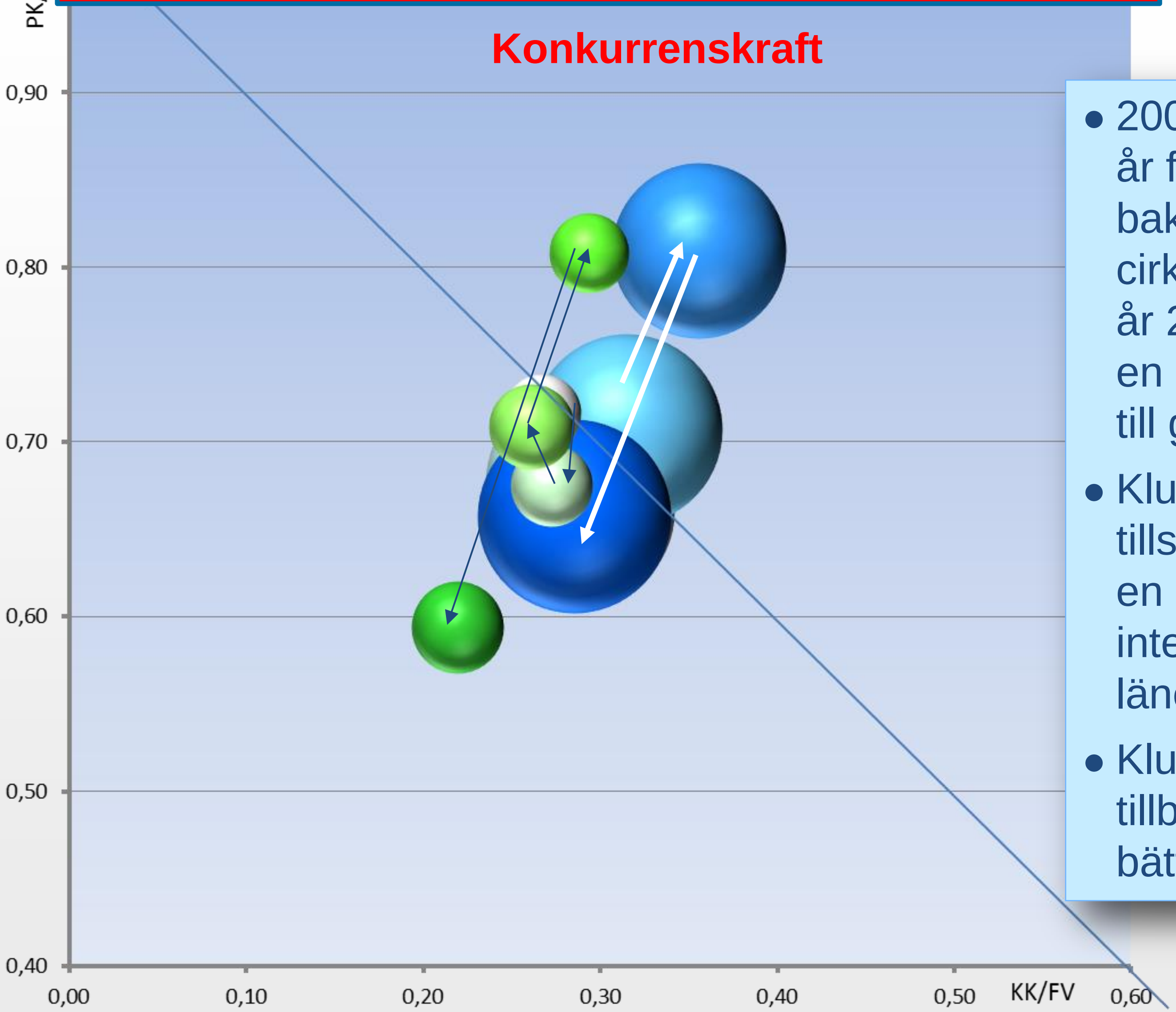


Region Red
Konkurrenskraft
PK/FV
KK/FV
1,00
0,90
0,80
0,70
0,60
0,50
0,40
0,00
0,10
0,20
0,30
0,40
0,50
0,60



Region Red
Konkurrenskraft
PK/FV
1,00
0,90
0,80
0,70
0,60
0,50
0,40
0,00
0,10
0,20
0,30
0,40
0,50
KK/FV
0,60

Region Red



- 2006 och 2007 var bra år för länet (ligger dolda bakom den mörkaste cirkeln), därefter svaga år 2008 och 2009 med en stor förbättring 2010 till god konkurrenskraft.
- Klusterföretagen tillsammans fick också en påverkan 2009 men inte så negativ som länet i sin helhet.
- Klustren kom 2010 tillbaka till en betydligt bättre position än länet.

Företagens finansiella utveckling 2006 – 2010 alla kluster

Förädlingsvärde
Lönsamhet
Produktivitet

SIMPLER

Comparison of 12 Clusters in North Mid Sweden 2006 - 2010 (unidentified names)

		Value Added Growth				Profitability % of Value Added				Wages per employee				
Total Rank	**Cluster**	Cluster	Control	Diff	Rank	Cluster	Control	Diff	Rank	Cluster	Control	Diff	Rank	SUM
1	Alpha	38%	21%	17%	3	5%	-13%	18%	2	17%	7%	10%	1	6
2	Bravo	27%	-1%	28%	2	12%	7%	5%	6	16%	8%	8%	2	10
3	Charlie	8%	-6%	14%	4	12%	-4%	16%	3	3%	-2%	5%	4	11
4	Delta	67%	21%	46%	1	12%	7%	5%	6	13%	11%	2%	6	13
5	Echo	-11%	-8%	-3%	12	10%	-16%	26%	1	12%	9%	3%	5	18
6	Foxtrot	16%	4%	12%	6	-2%	1%	-3%	11	17%	9%	8%	2	19
7	Golf	40%	28%	12%	6	3%	-2%	5%	6	11%	10%	1%	8	20
8	Hotel	31%	18%	13%	5	5%	5%	0%	10	13%	11%	2%	6	21
9	India	18%	11%	7%	9	0%	-15%	15%	4	11%	11%	0%	9	22
10	Juliett	29%	20%	9%	8	7%	1%	6%	5	8%	15%	-7%	12	25
11	Kilo	33%	26%	7%	9	9%	8%	1%	9	13%	13%	0%	9	27
12	Lima	45%	38%	7%	9	-4%	12%	-16%	12	10%	14%	-4%	11	32

- 11 av 12 kluster slår kontrollgruppen i två av tre effektvariabler

Resultaten

SIMPLER
Firm Financial
Performance

Surveys
Firm General
Performance

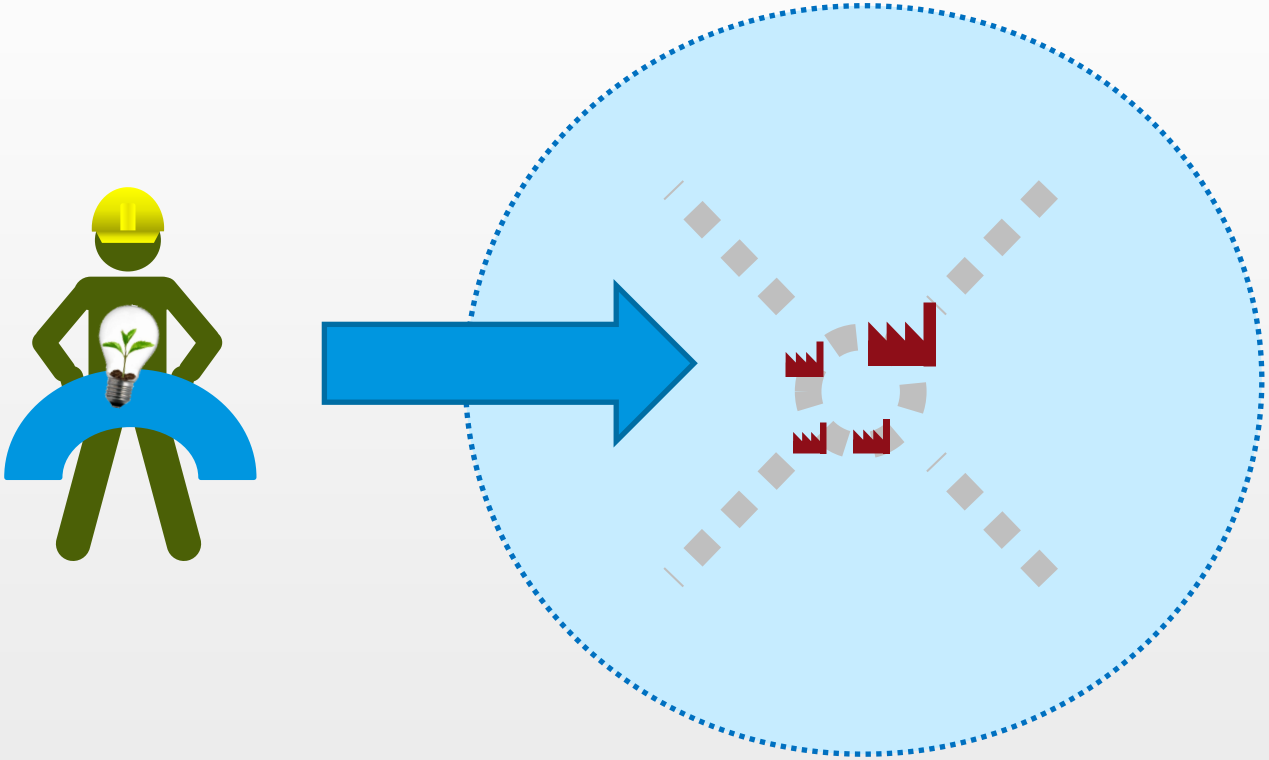
Surveys
Innovation Gap
Performance

11 av 12 kluster går bättre än kontrollgruppen
Motståndskraft mot kriser

Många svagheter
Firm-to-firm mest framgångsrikt

Stora förbättringar överlag
Dock stora regionala skillnader
Stora skillnader i de olika resultatmåtten
(försäljning och nya/förbättrade produkter störst effekt)

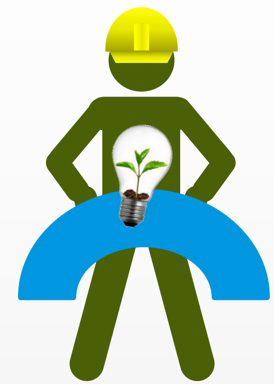
Framtiden?



1. Övergripande mål och aktiviteter

Kluster

Identitet
Vision och strategisk agenda
Allmänt nätverkande
Attraktivitet & varumärke



Innovation

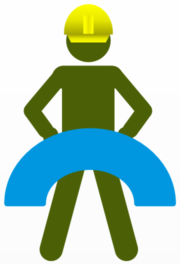
Brygga innovationsgapen

Konkreta innovationsprojekt
- Nya produkter, processer, tjänster, affärsmodeller…

Affärsutveckling

Marknadsanalys
Kommersiellt samarbete
Mässor
Exportsamarbeten
Jämställdhet
Rekrytering av personal

2. Finansiering av klusterorganisationer

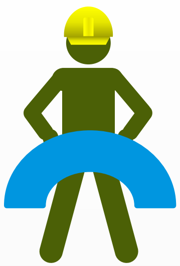


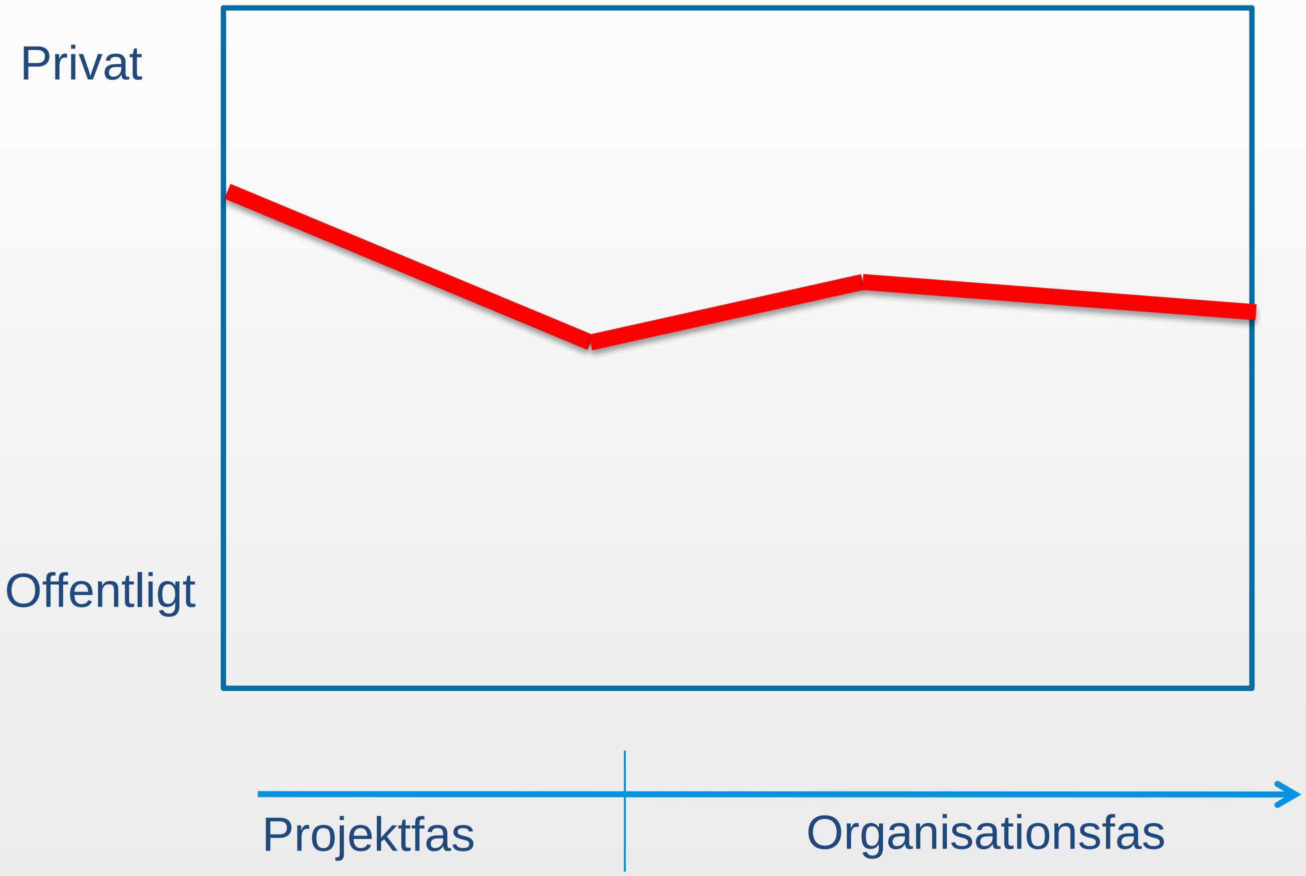
Hållbart?

100-0

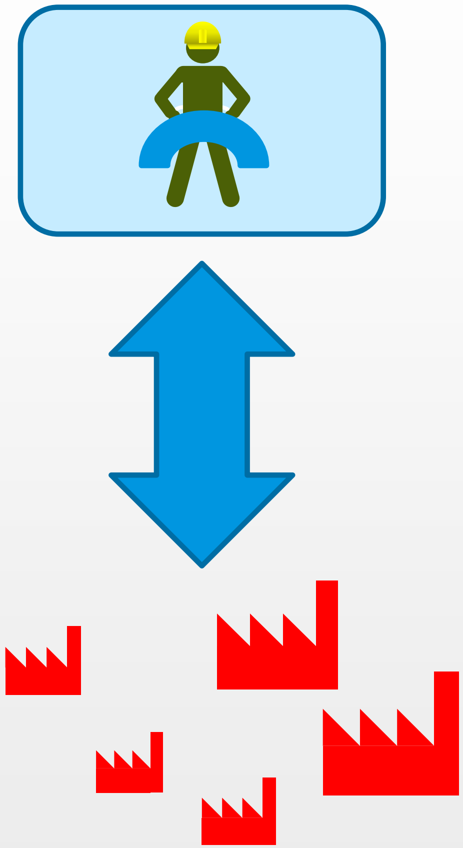
Framgångsmodell?

60-40

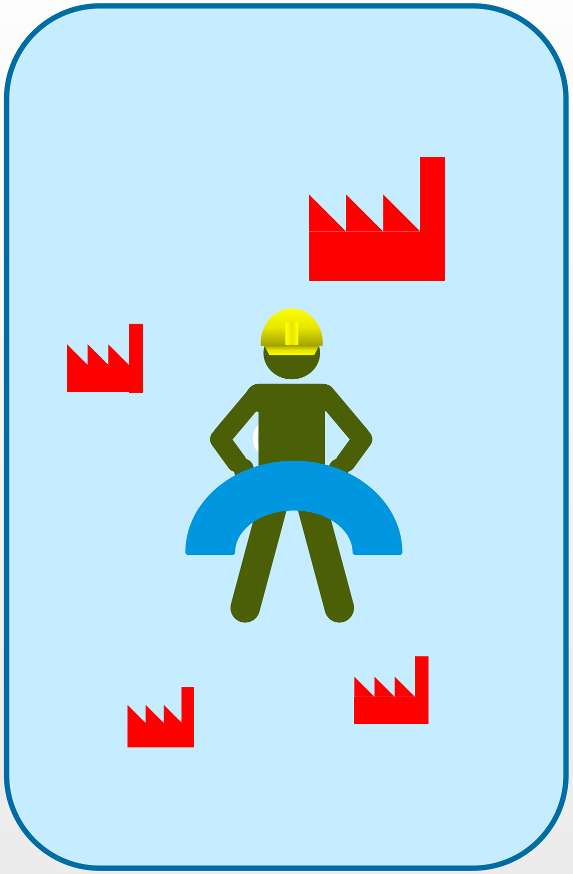


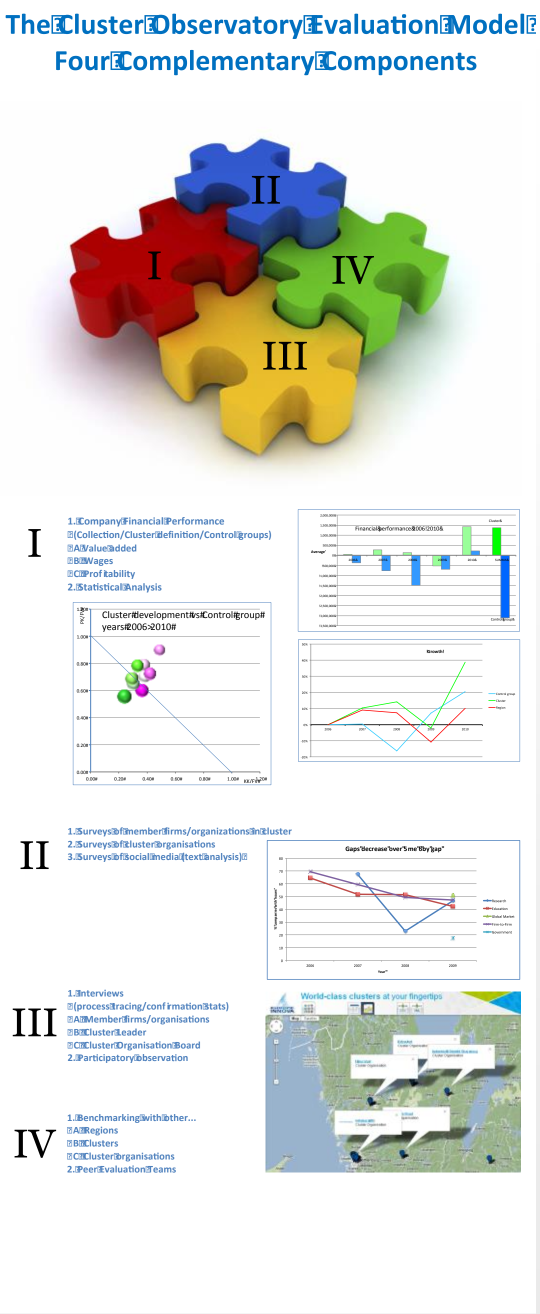


Klusterorganisationens roll?



vs



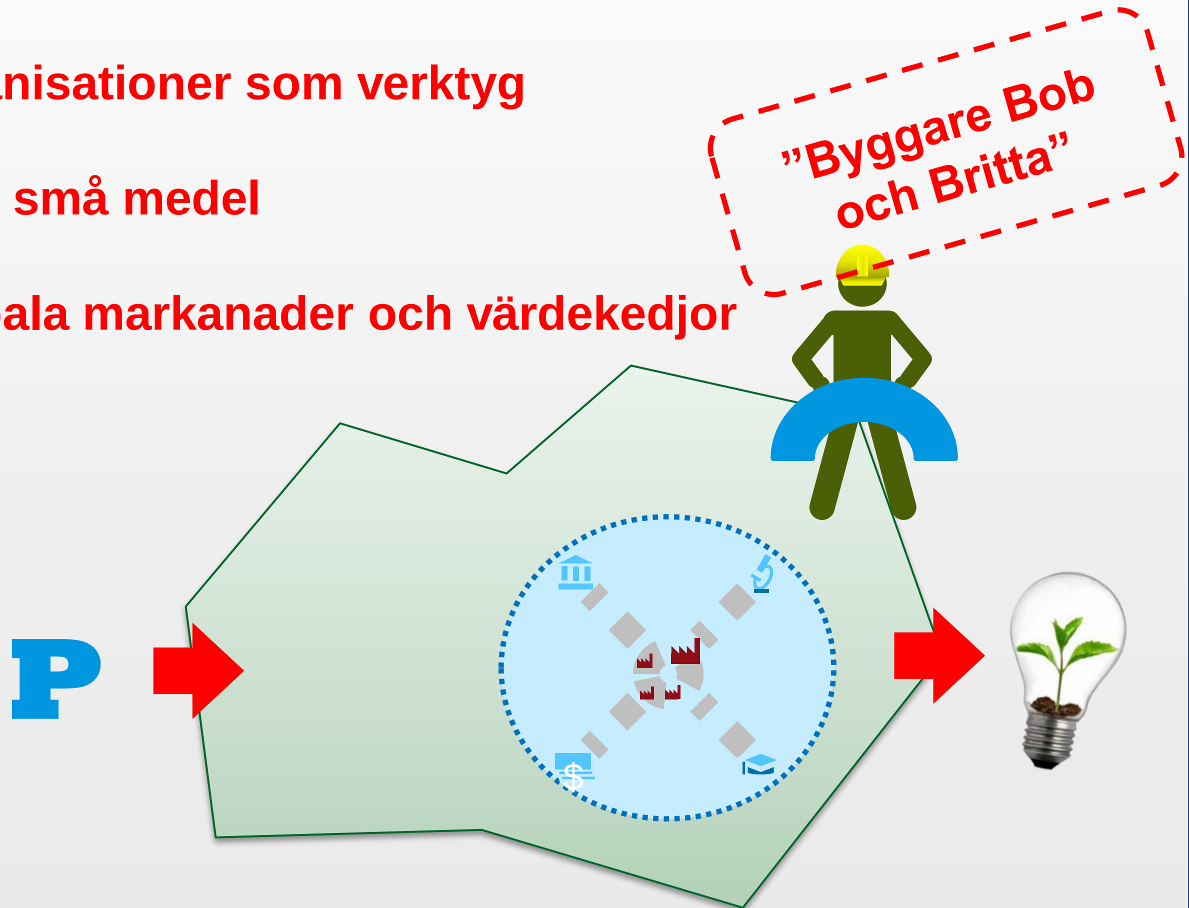


TACK!

CLUSTER OBSERVATORY

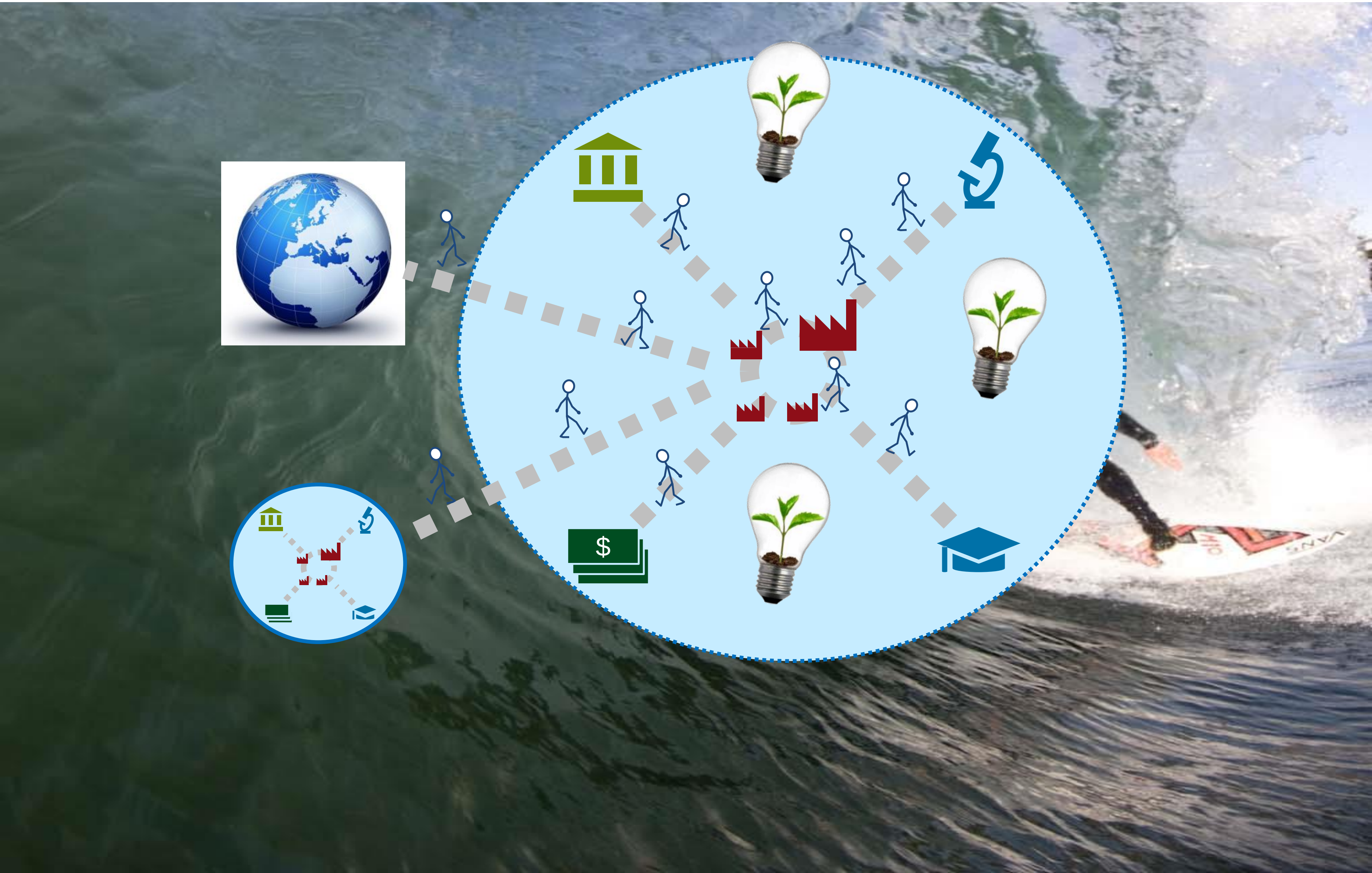
Regional innovations- och klusterpolitik

1. Bygger på en förståelse kring innovationsgapen i kluster
2. Fokuserar innovationsstrategin på broar och trafik
3. Stimulerar klusterorganisationer som verktyg
4. Startar processer med små medel
5. Länkar kluster till globala markanader och värdekedjor

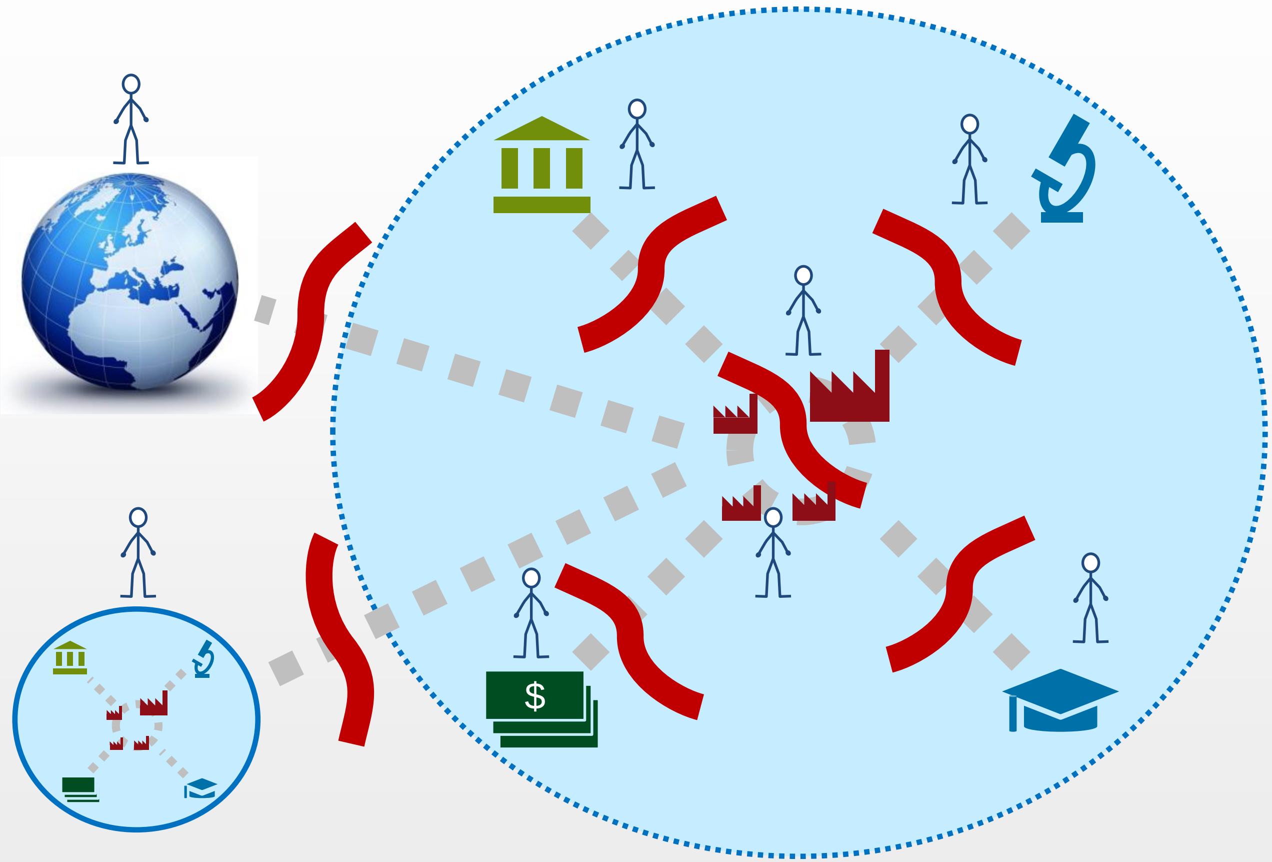


Organizing Clusters

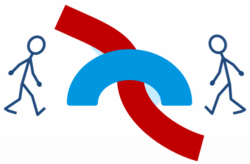
Dream of Dynamic Clusters…



… and reality = many gaps



Policy

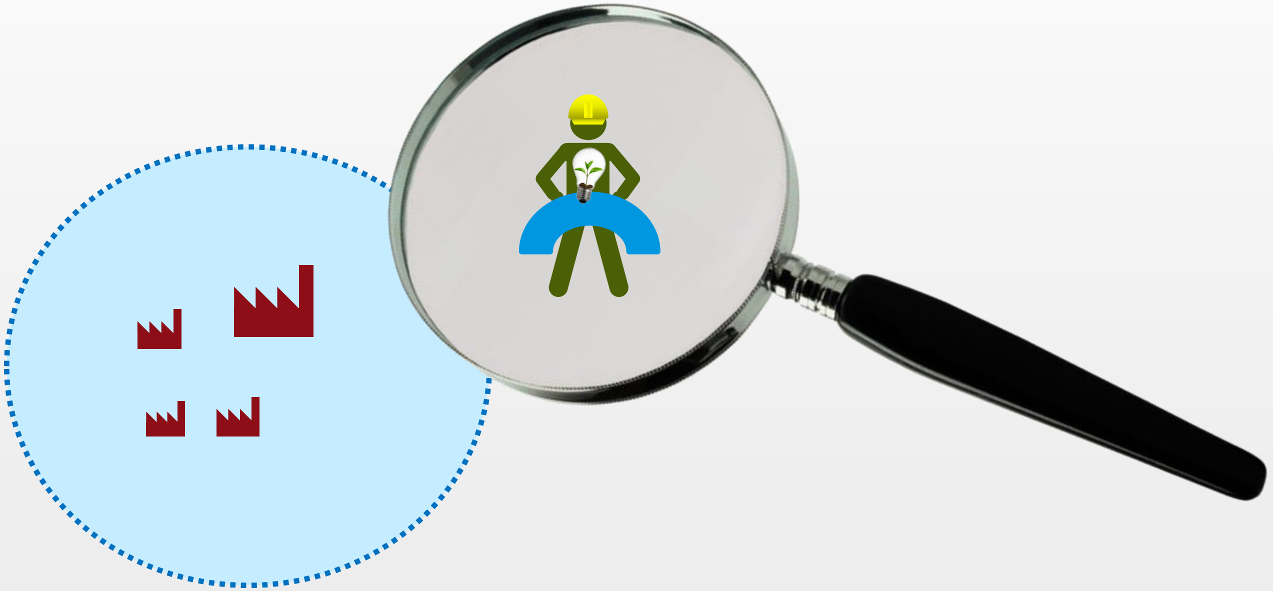


Sector	Few gaps	Many gaps
Overall		
Specific		

Bridge Builders

Sector	Few gaps	Many gaps
Overall	Science parks	Regional public org.
Specific	Incubators	Cluster organizations

Evaluation
12 Organized Clusters



SLIM III – Levels of Analysis

North Mid Sweden

Region

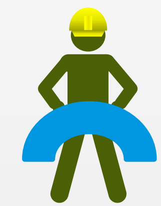
Cluster

Region Red

Region Green

Region Blue

Alpha
Bravo
Charlie
Delta
Echo
Foxtrot
Golf
Hotel
India
Juliett
Kilo
Lima



SLIM III - Methods

SIMPLER
Firm Financial Performance

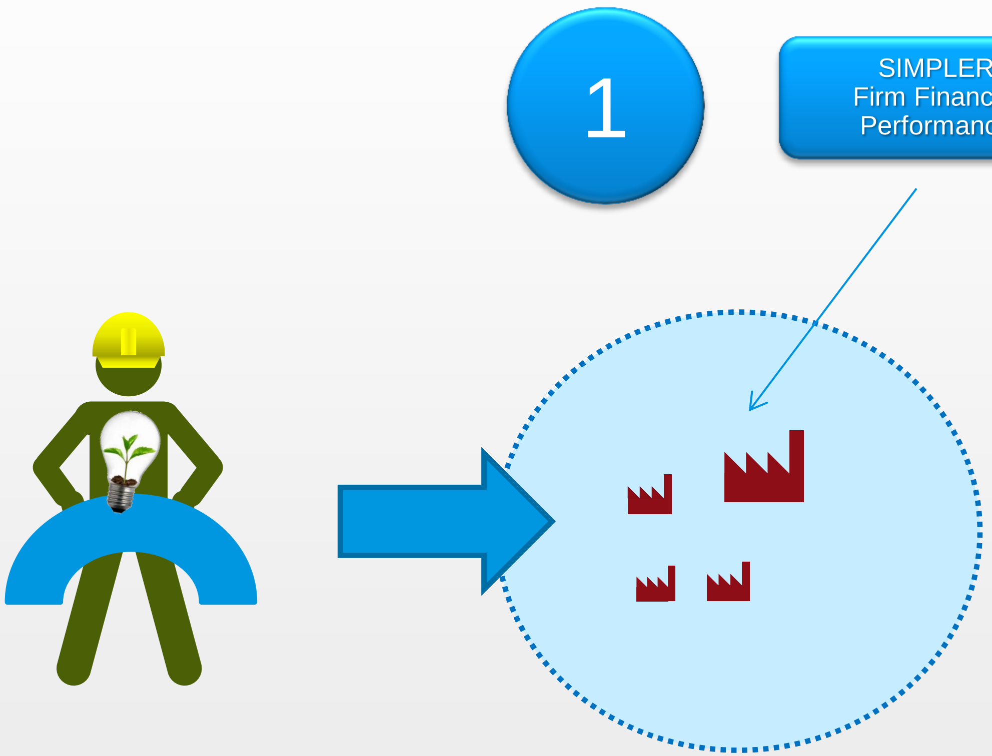
SLIM III - Methods

SIMPLER
Firm Financial Performance

Surveys
Firm General Performance

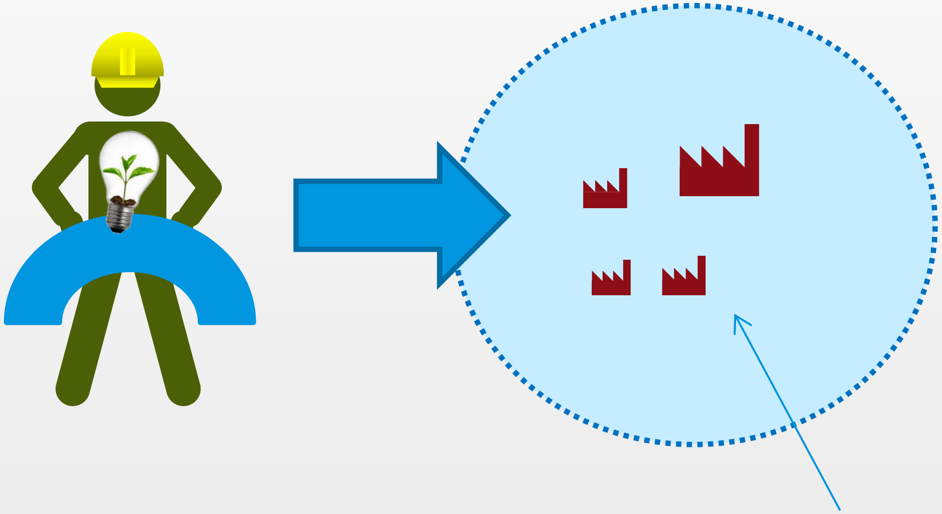
Surveys
Innovation Gap Performance

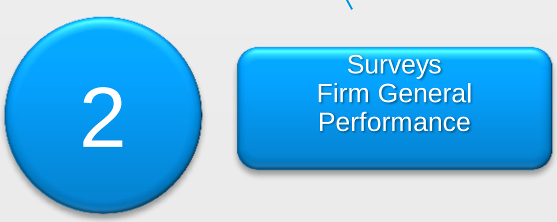
Effects on Firms



Competitiveness
Value Added
Profitability
Productivity

Effects on Firms



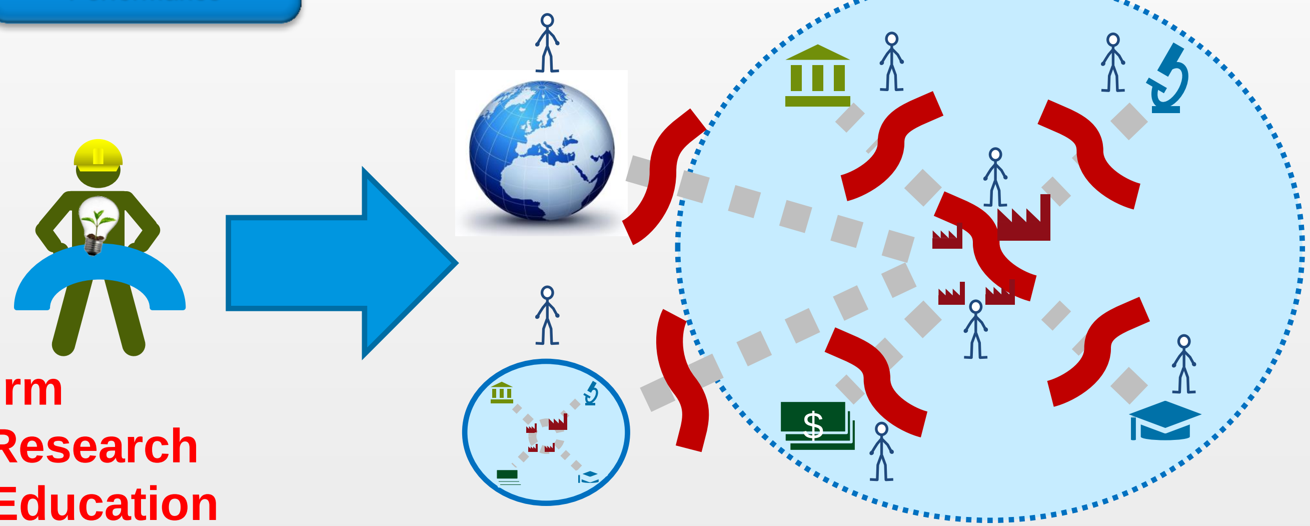


Innovation
Sales
Employment
Equality
Sustainability
Diversity

Effects on Innovation Gaps

3

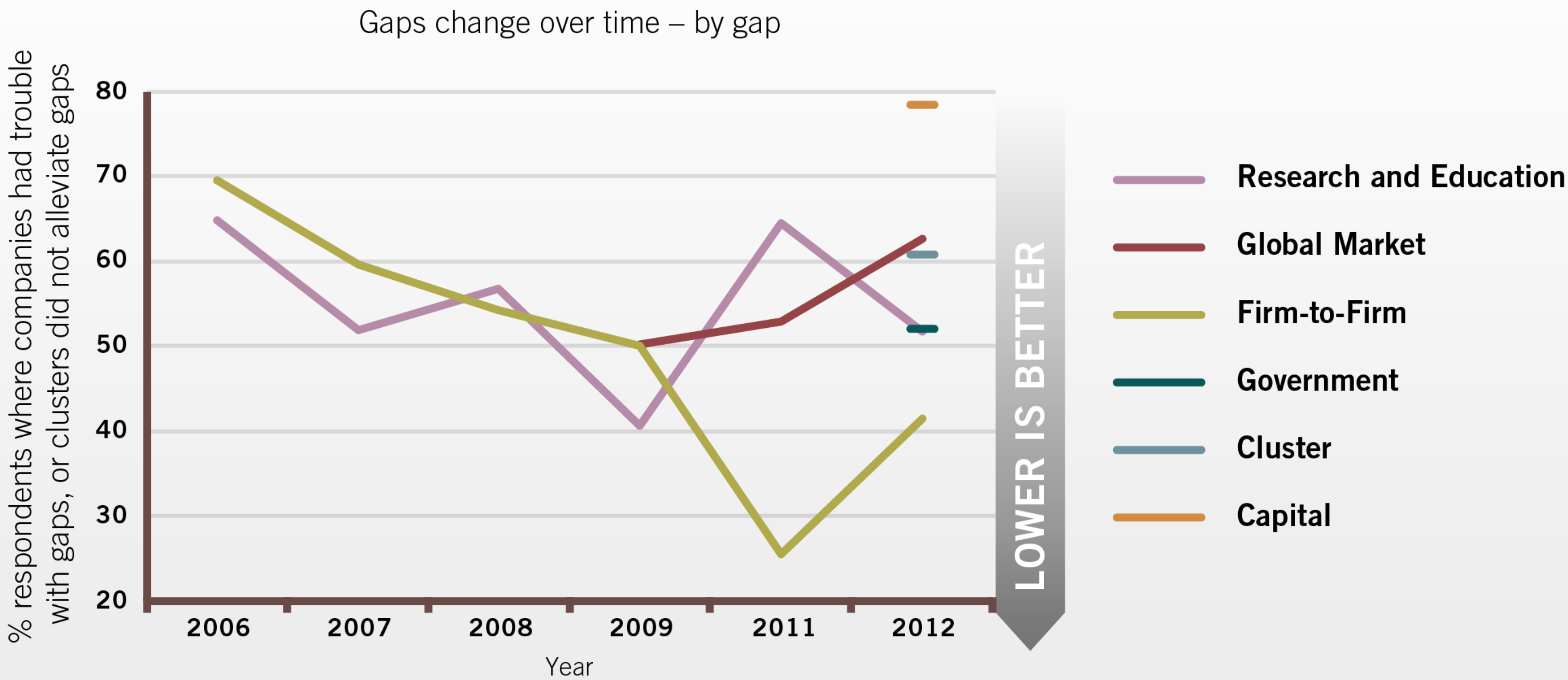
Surveys
Innovation Gap
Performance



Firm-firm
Firm_Research
Firm- Education
Firm-Capital
Firm-Public
Firm-Global
Firm-Cluster

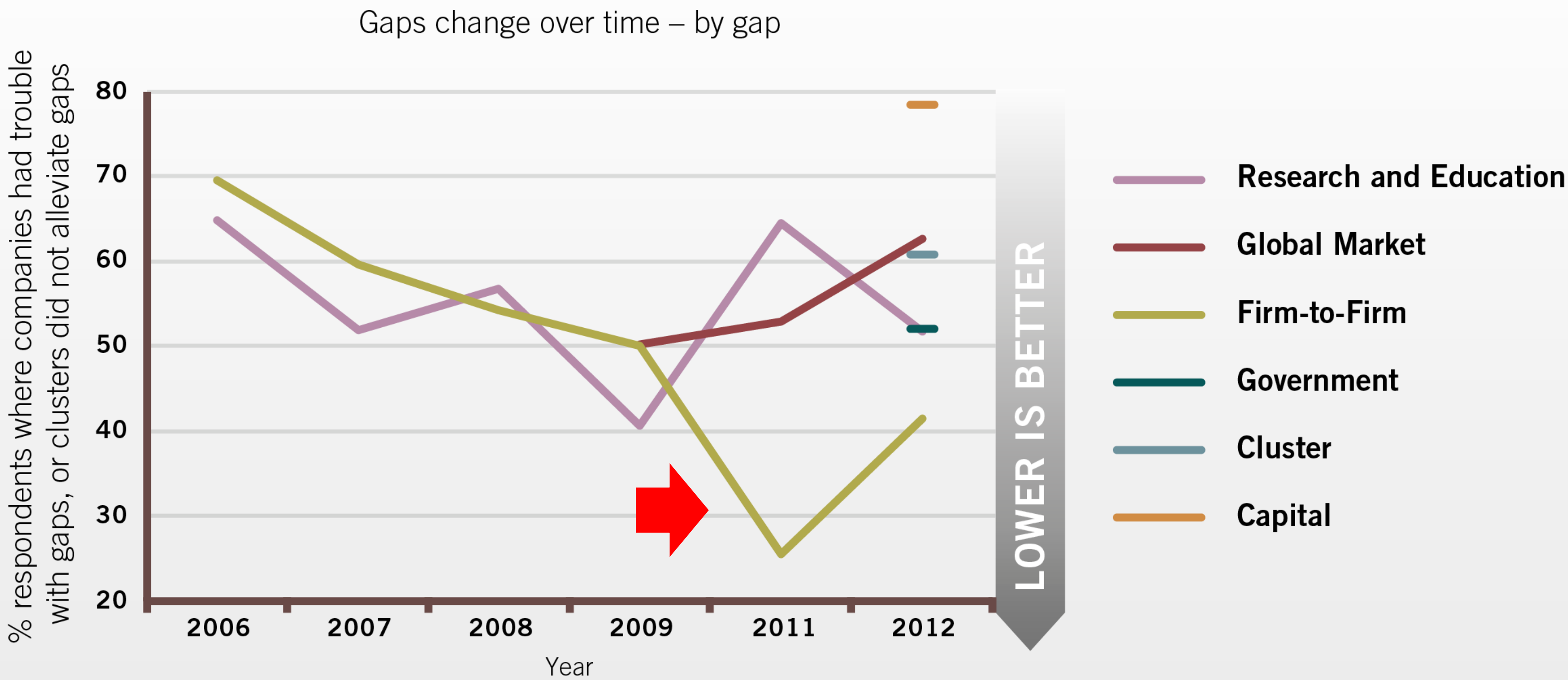
Innovation Gaps
All clusters

3

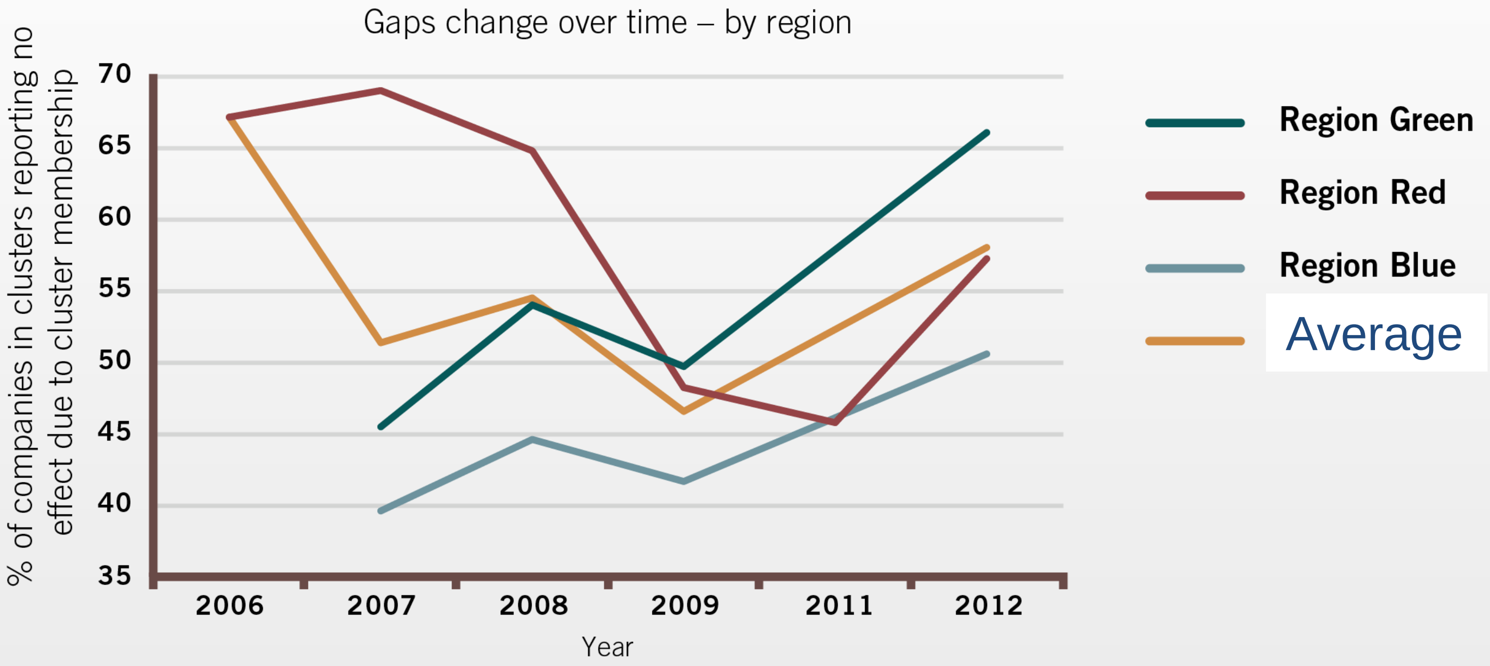


Innovation Gaps
All clusters

3

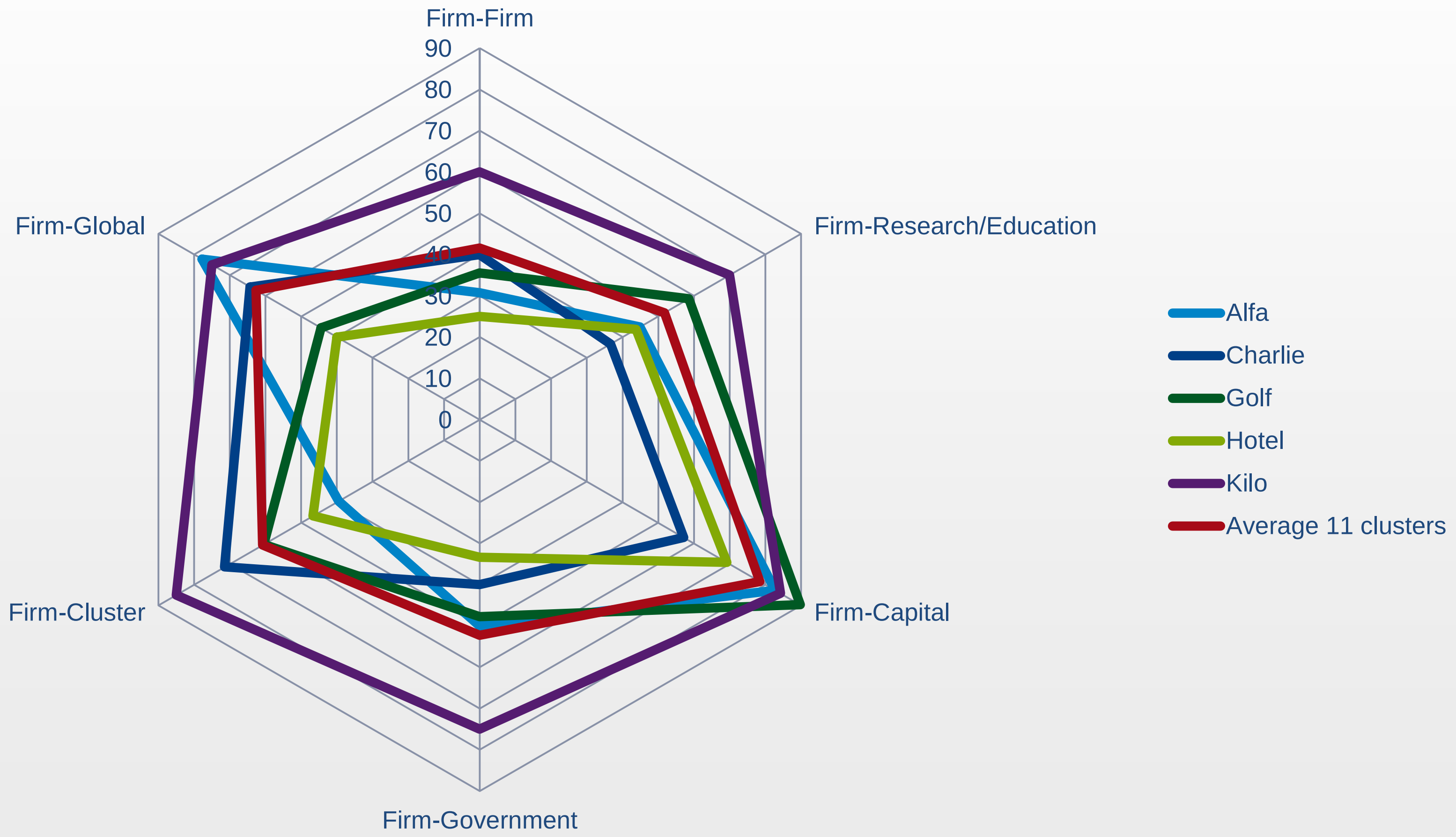


Innovation Gaps per Region
Sum of 6 gaps



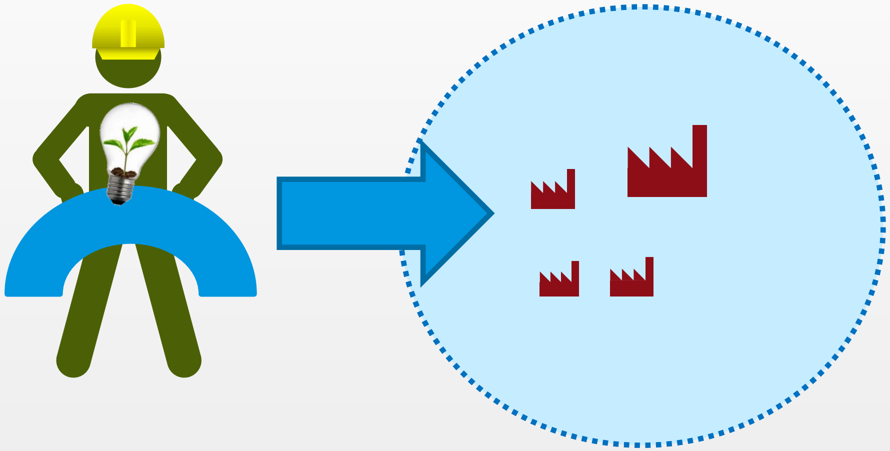
Innovation Gaps per Cluster

3



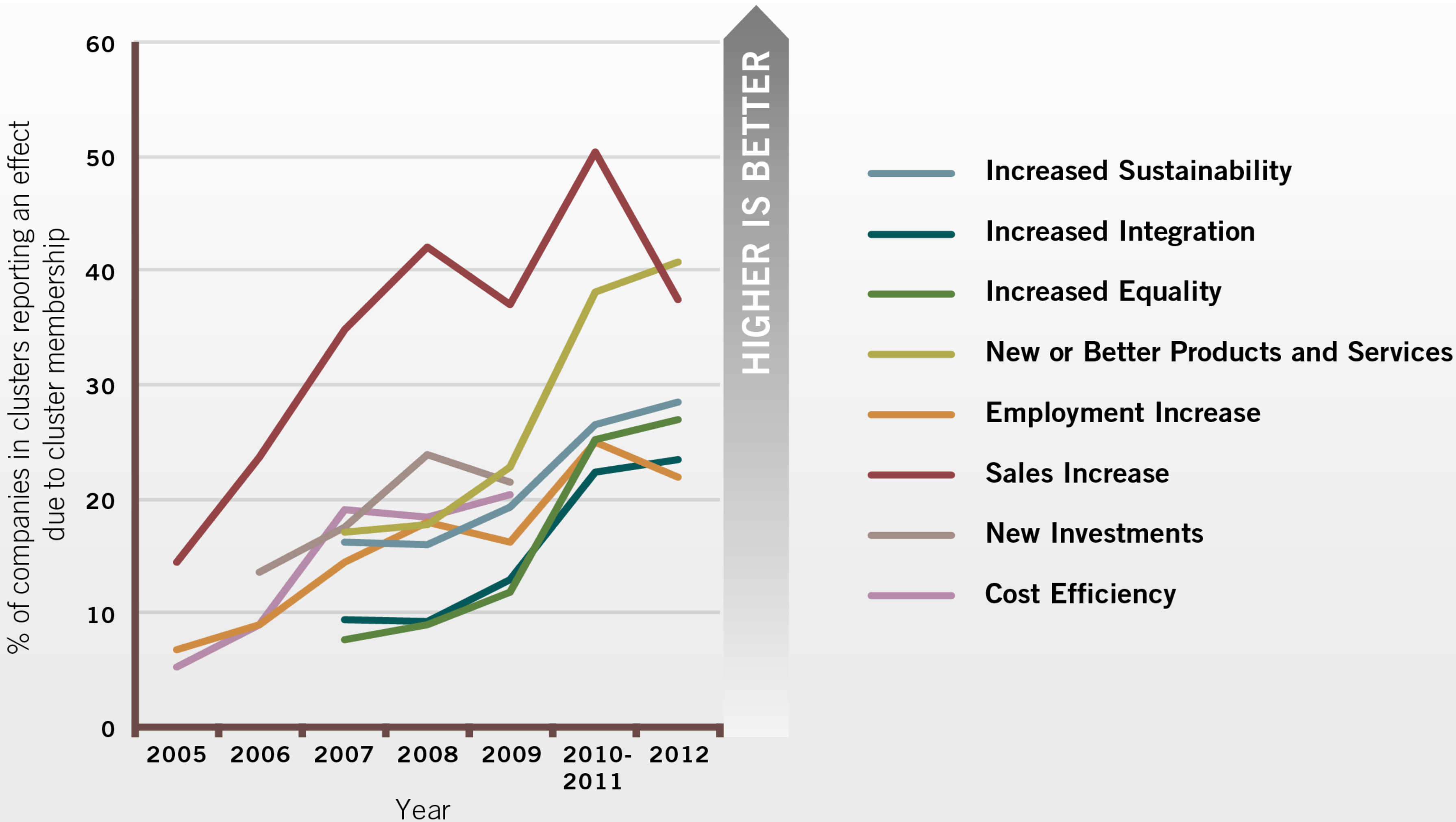
General Firm Performance
North Mid Sweden
2005 - 2012

2

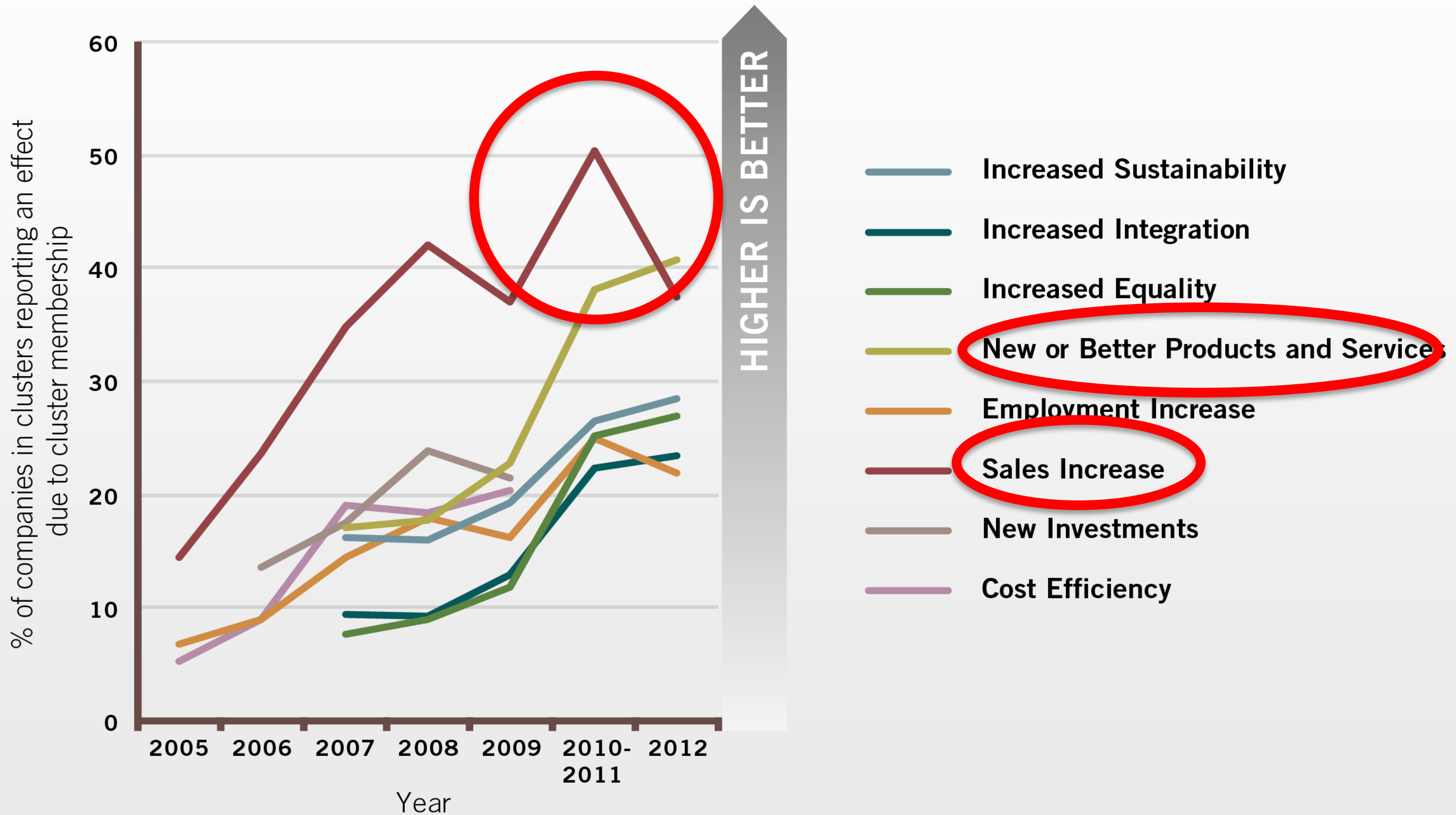


General Firm Performance North Mid Sweden 2005 - 2012

2

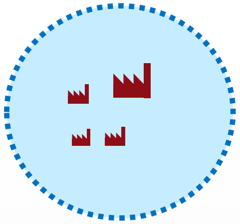


General Firm Performance
North Mid Sweden
2005 - 2012



2

General Performance per Region
Equality
2007 - 2012



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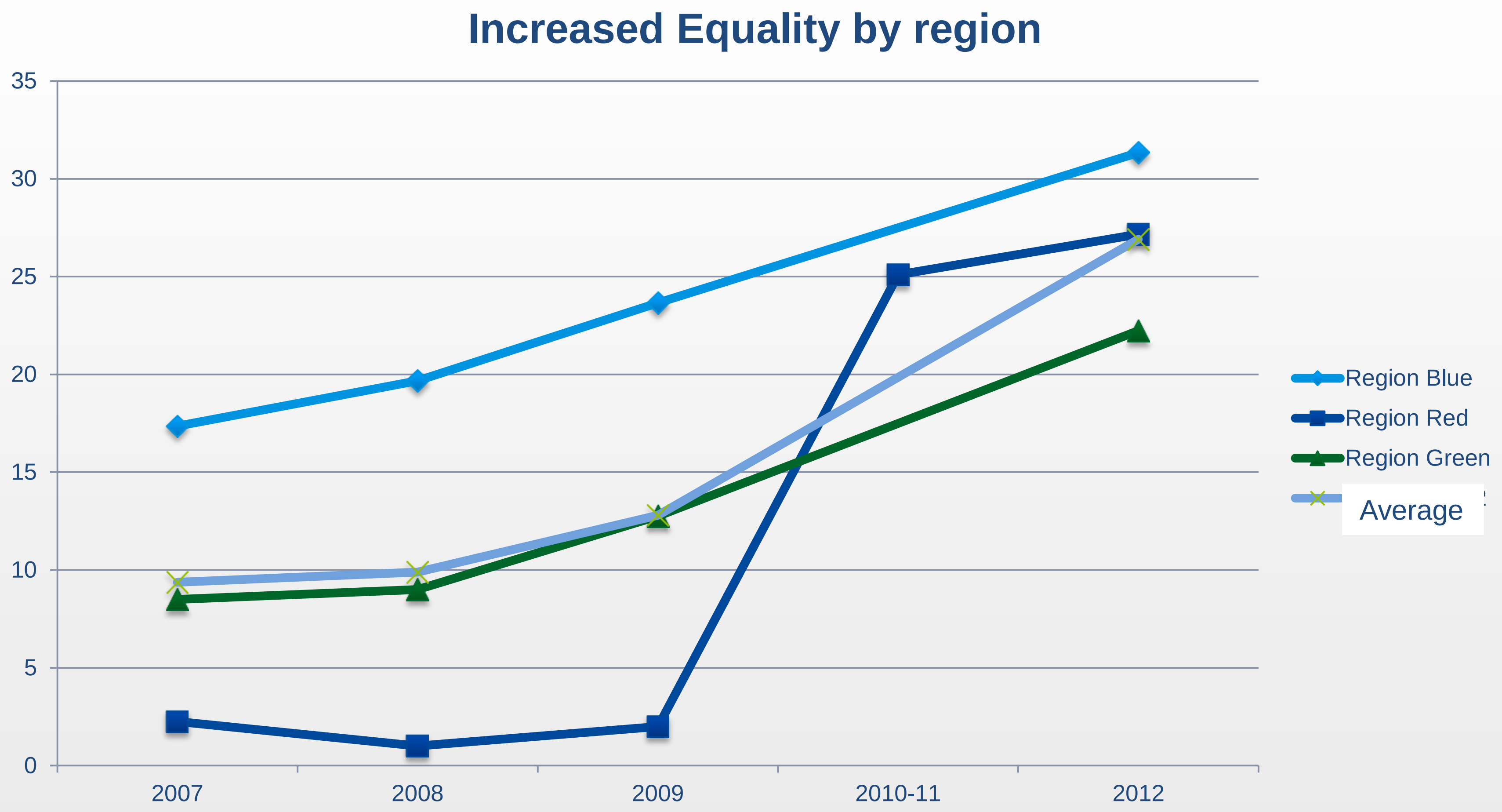
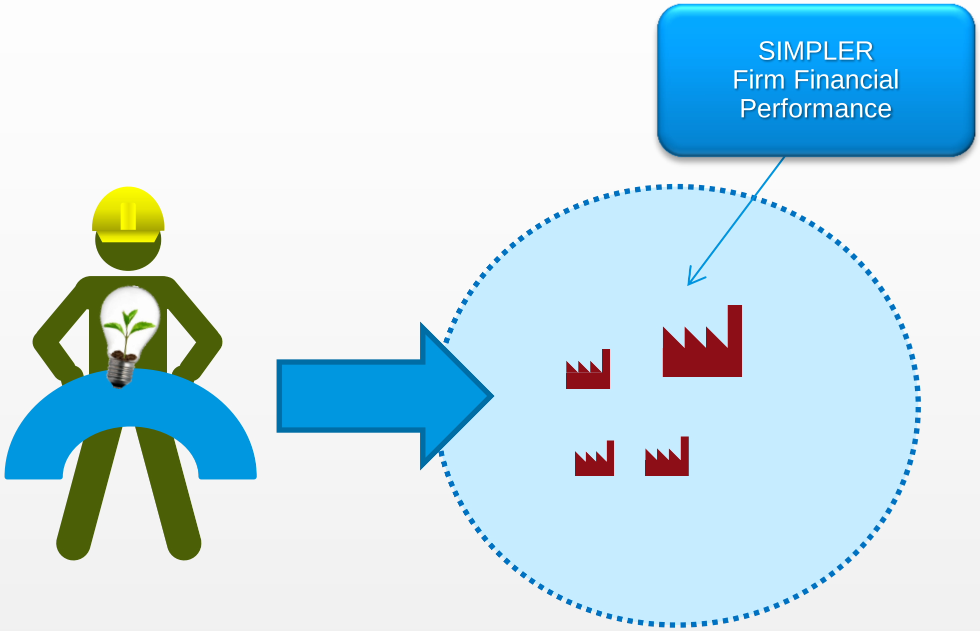
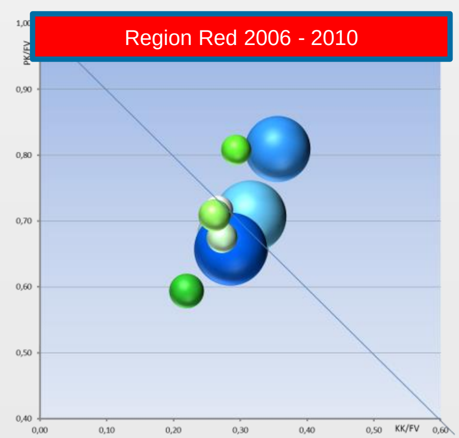


SIMPLER Analysis

1

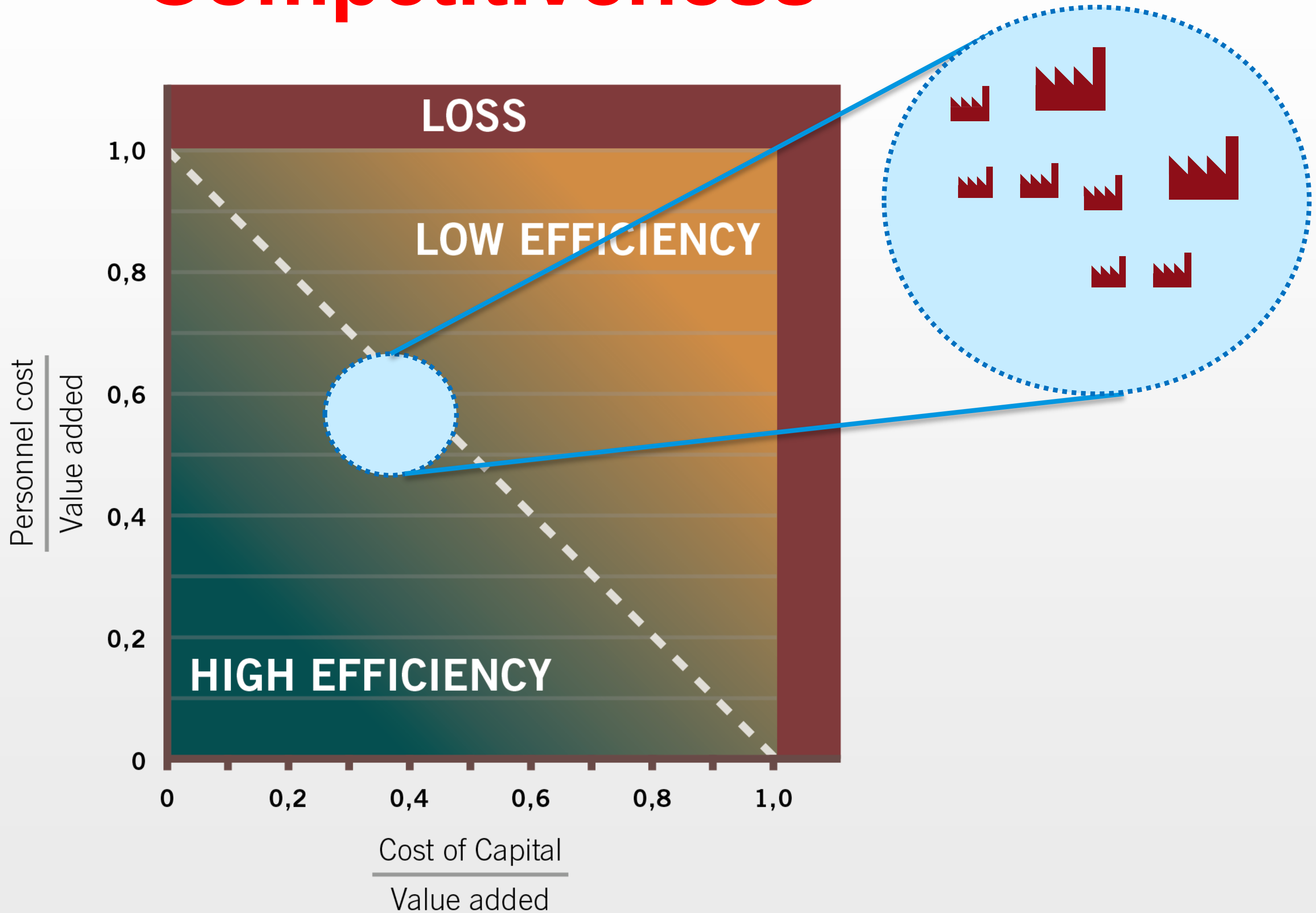


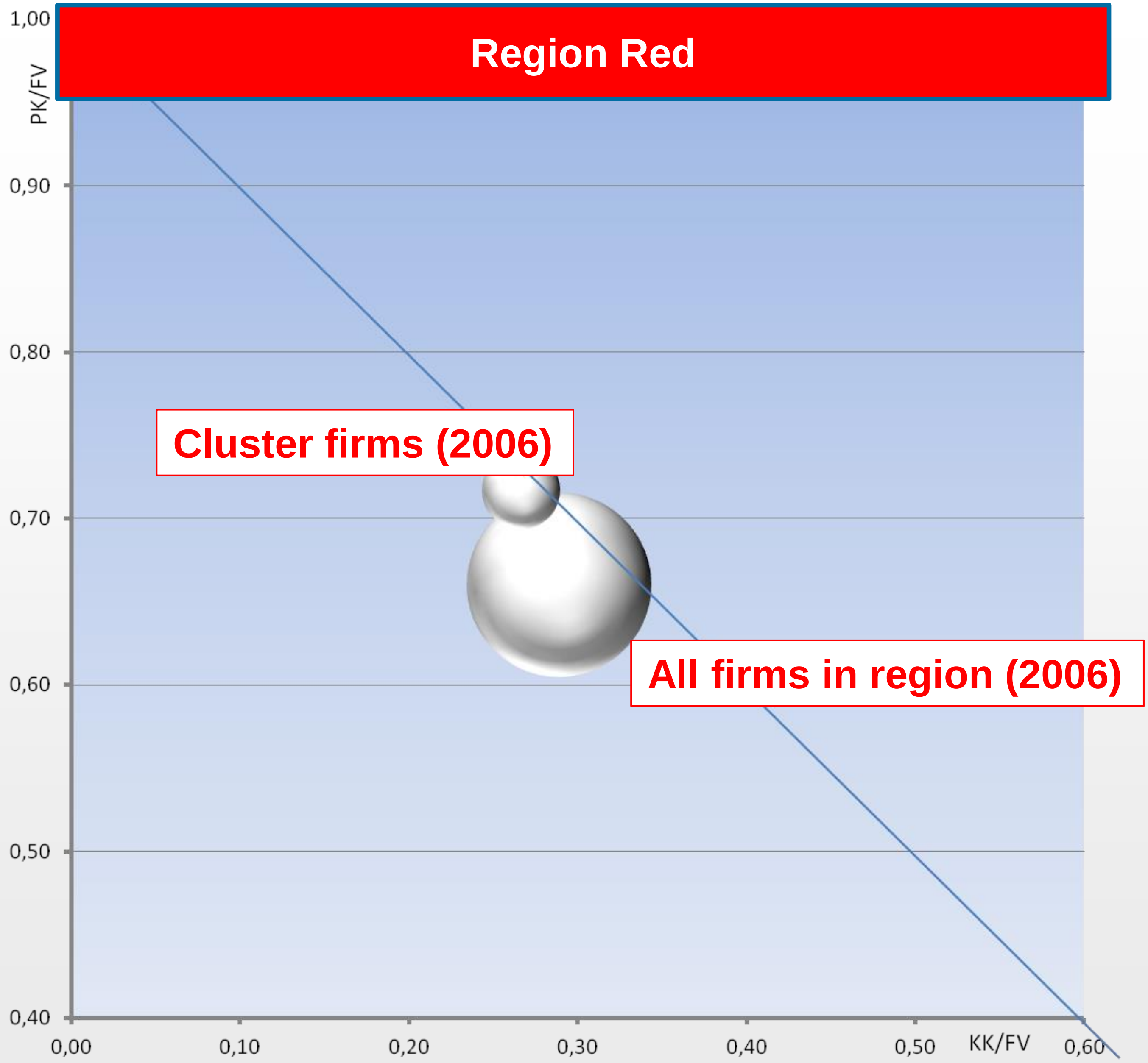
Competitiveness
Value Added
Profitability
Productivity



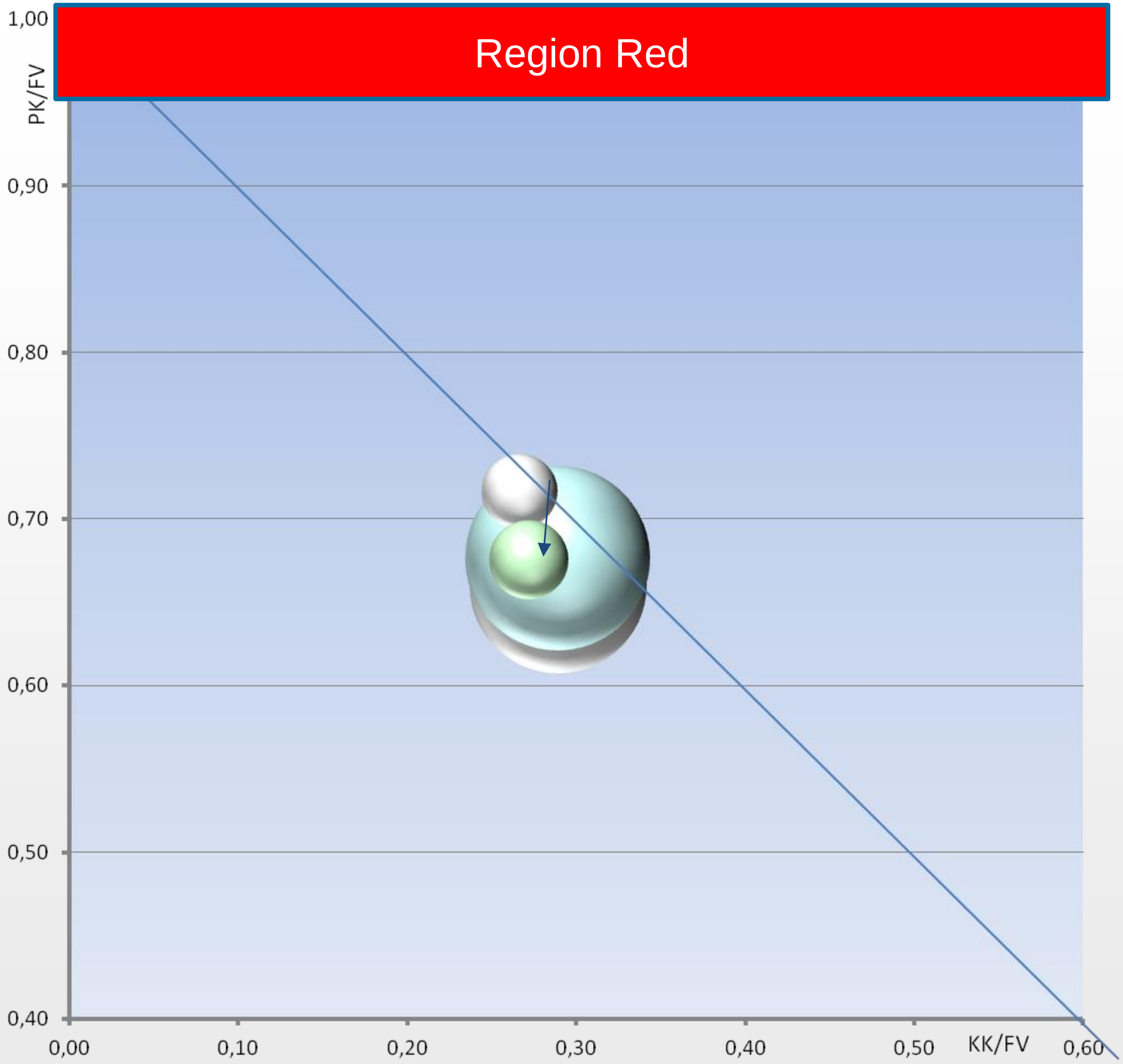
SIMPLER

Competitiveness





Region Red
1,00
PK/FV
0,90
0,80
0,70
0,60
0,50
0,40
Cluster firms (2006)
All firms in region (2006)
0,00
0,10
0,20
0,30
0,40
0,50
KK/FV
0,60


Region Red
PK/FV
1,00
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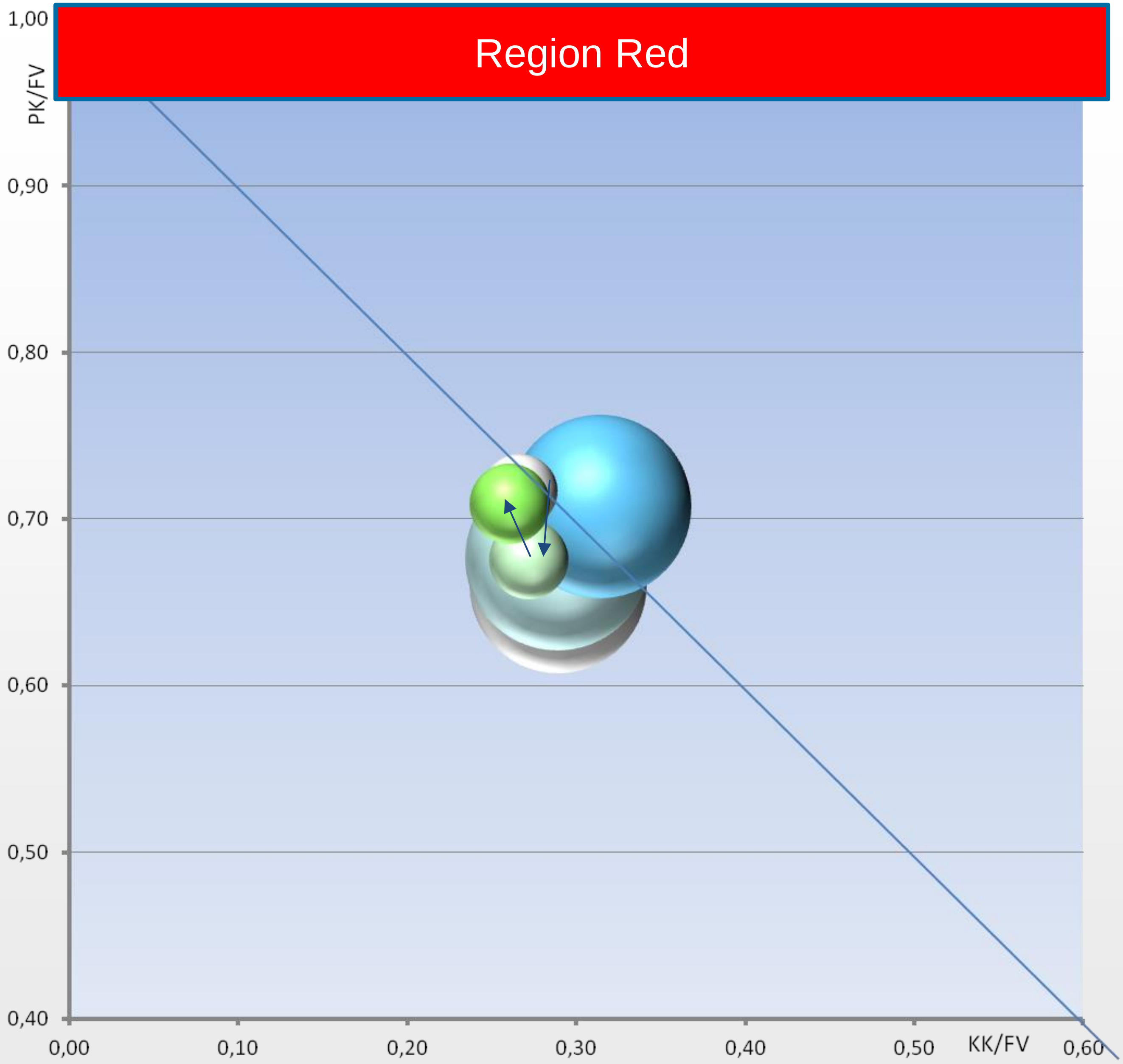
0,80
0,70
0,60
0,50
0,40
0,00
0,10
0,20
0,30
0,40
0,50
KK/FV
0,60


Region Red
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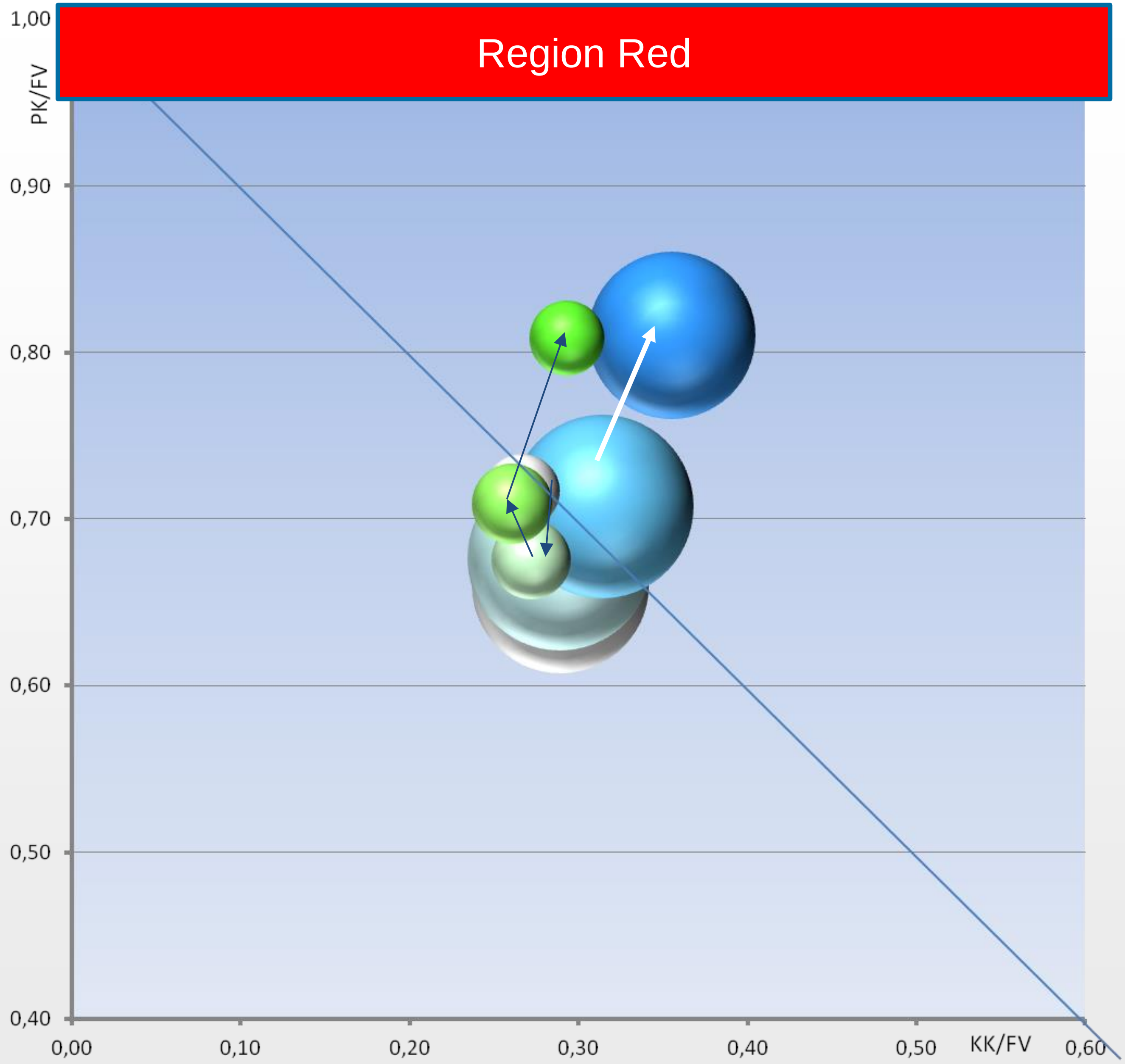

Region Red
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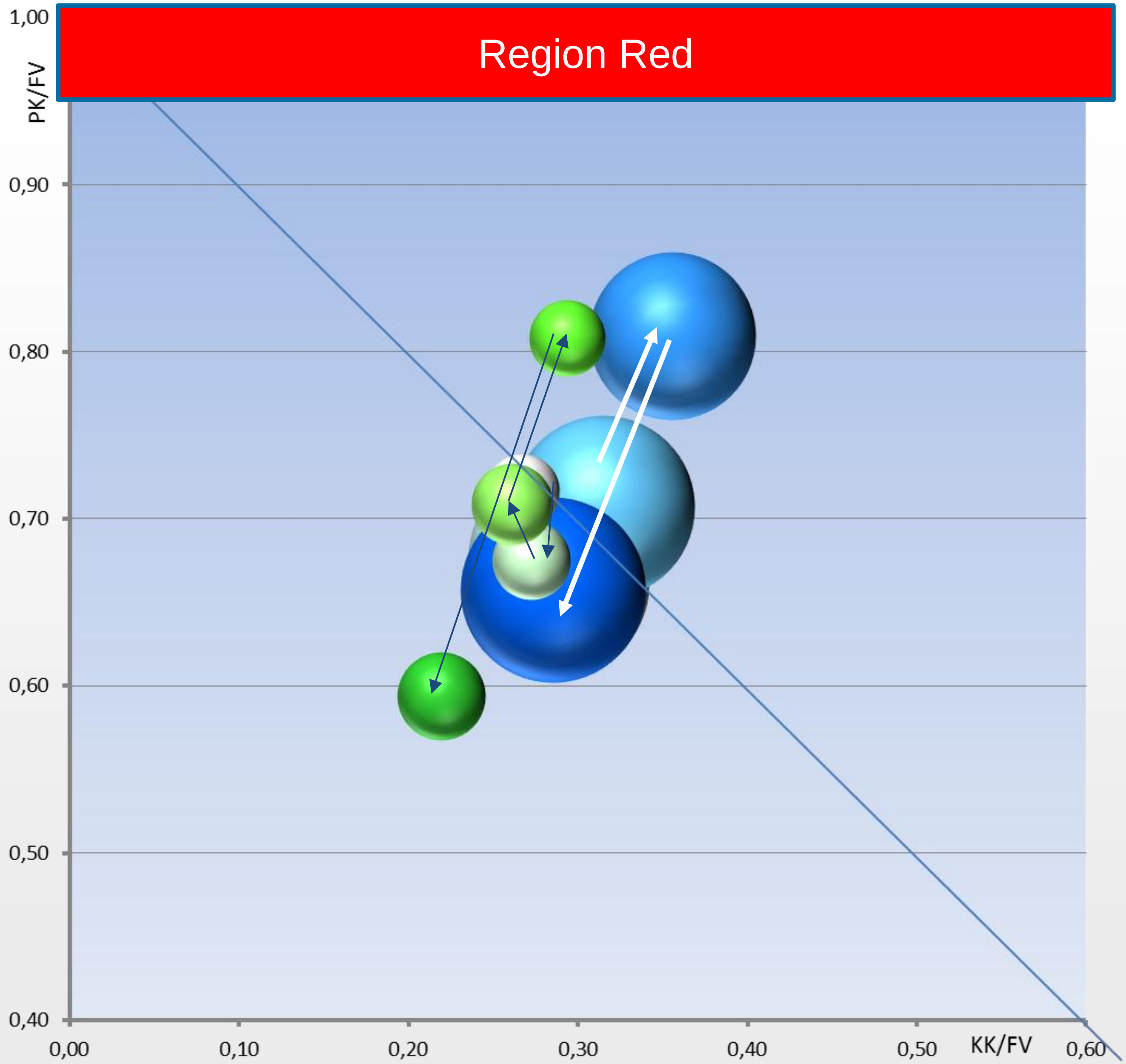
Region Red
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1,00
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0,70
0,60
0,50
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0,00
0,10
0,20
0,30
0,40
0,50
KK/FV
0,60

SIMPLER Financial Evaluation 2006 – 2010 all clustes

Vale added
Profitability
Productivity

SIMPLER

Comparison of 12 Clusters in North Mid Sweden 2006 - 2010 (unidentified names)

		Value Added Growth				Profitability % of Value Added				Wages per employee				
Total Rank	**Cluster**	Cluster	Control	Diff	Rank	Cluster	Control	Diff	Rank	Cluster	Control	Diff	Rank	SUM
1	Alpha	38%	21%	17%	3	5%	-13%	18%	2	17%	7%	10%	1	6
2	Bravo	27%	-1%	28%	2	12%	7%	5%	6	16%	8%	8%	2	10
3	Charlie	8%	-6%	14%	4	12%	-4%	16%	3	3%	-2%	5%	4	11
4	Delta	67%	21%	46%	1	12%	7%	5%	6	13%	11%	2%	6	13
5	Echo	-11%	-8%	-3%	12	10%	-16%	26%	1	12%	9%	3%	5	18
6	Foxtrot	16%	4%	12%	6	-2%	1%	-3%	11	17%	9%	8%	2	19
7	Golf	40%	28%	12%	6	3%	-2%	5%	6	11%	10%	1%	8	20
8	Hotel	31%	18%	13%	5	5%	5%	0%	10	13%	11%	2%	6	21
9	India	18%	11%	7%	9	0%	-15%	15%	4	11%	11%	0%	9	22
10	Juliett	29%	20%	9%	8	7%	1%	6%	5	8%	15%	-7%	12	25
11	Kilo	33%	26%	7%	9	9%	8%	1%	9	13%	13%	0%	9	27
12	Lima	45%	38%	7%	9	-4%	12%	-16%	12	10%	14%	-4%	11	32

- 11 of 12 clusters beat the control group in two out of three dimensions

Results

SIMPLER
Firm Financial
Performance

11 of 12 clusters beat control group

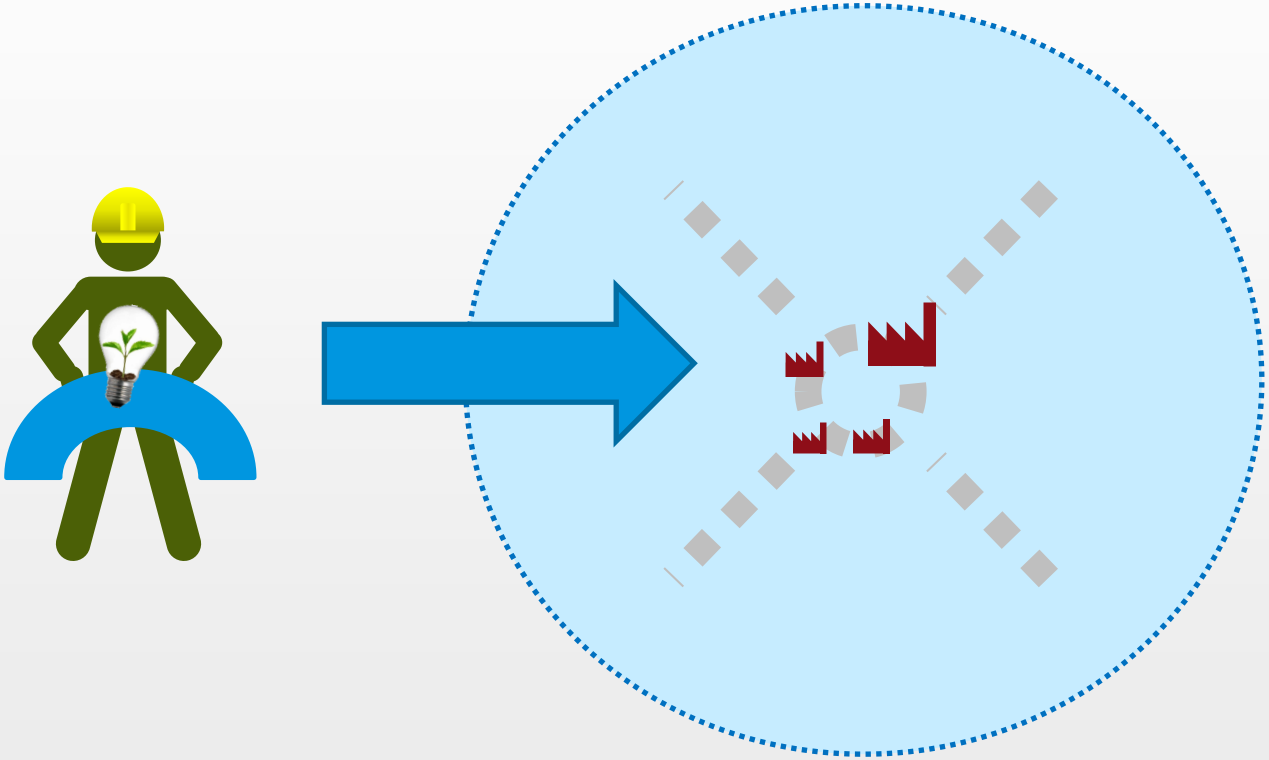
Surveys
Firm General
Performance

General improvements
Large regional and clusters differences
Largest effect on enhanced sales and innovation

Surveys
Innovation Gap
Performance

Many weaknesses
Firm-to-firm gap most successful

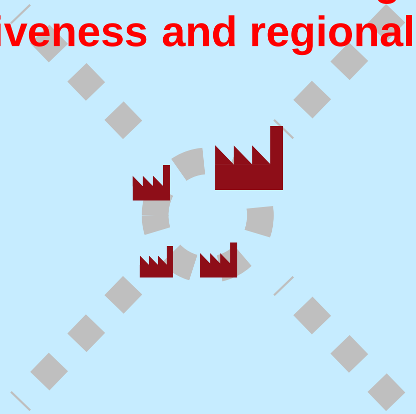
Future?



1. Objectives and Activities

Cluster

Identity
Vision and strategic agenda
General networking
Attractiveness and regional brand



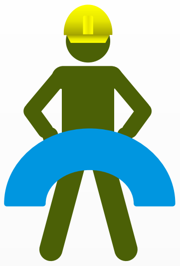
Innovation

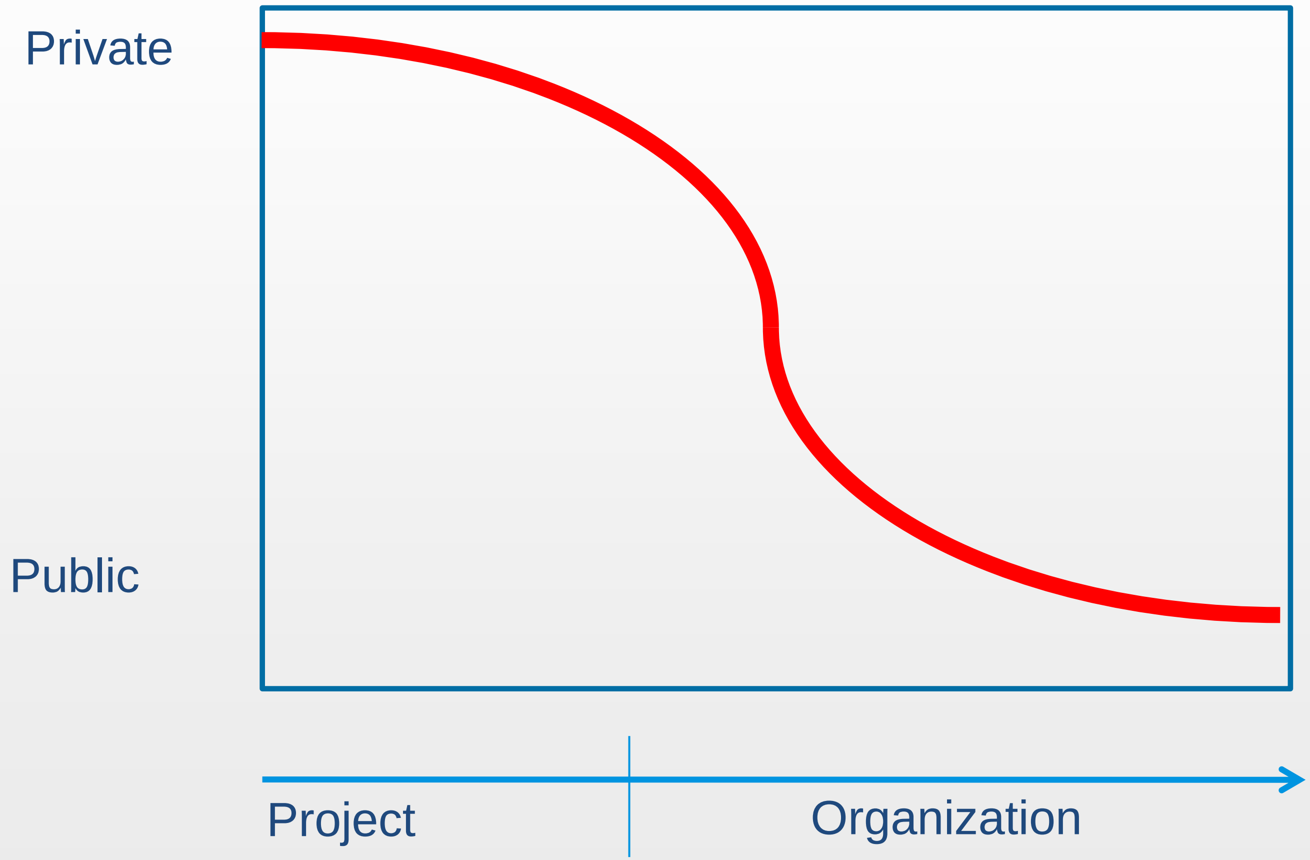
Bridge innovation gaps
Innovation projects

Business Development

Commercial cooperation
Trade shows
Joint exporting

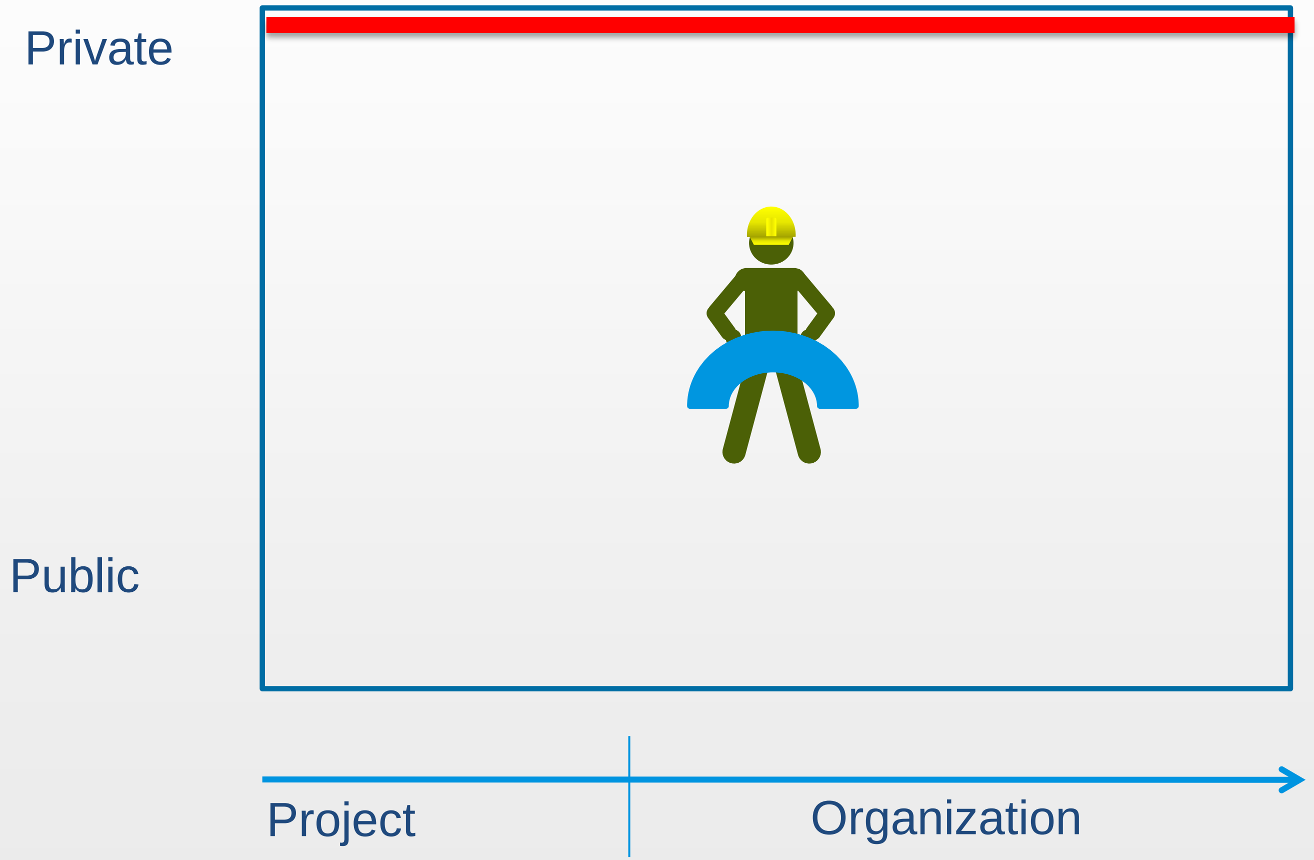
2. Financing of Cluster Organizations





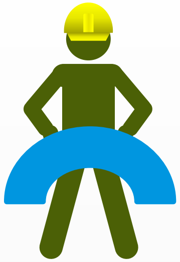
Sustainable?

100-0

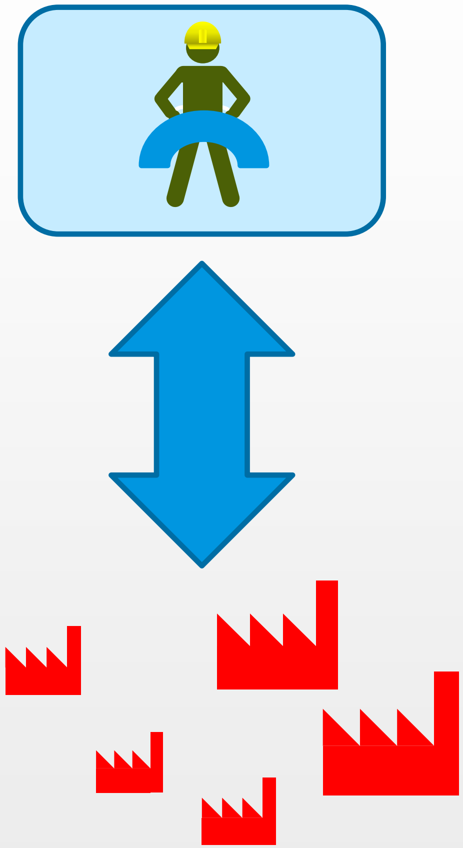


Sustainable Model?

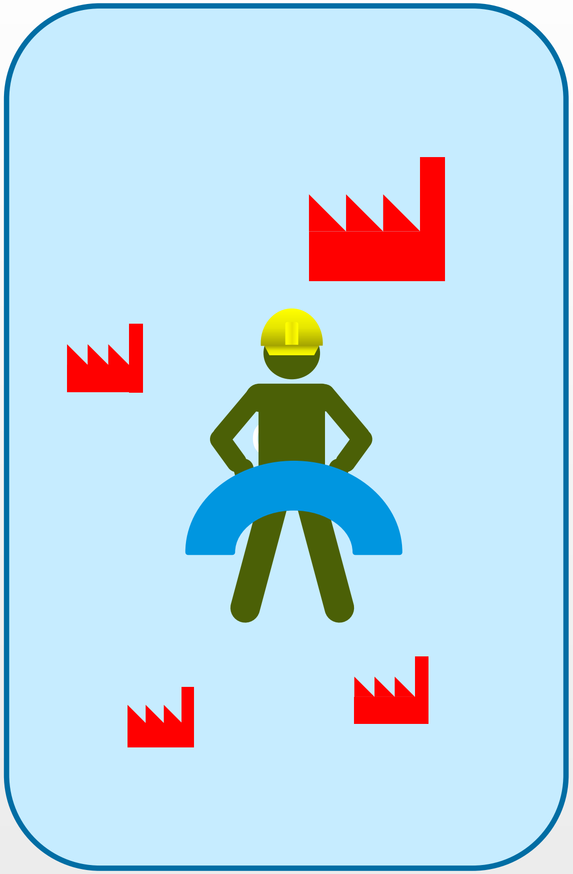
60-40



Cluster Organization Role?



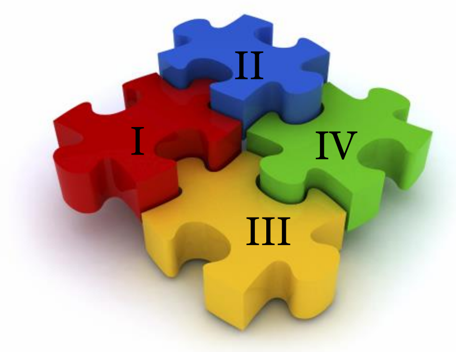
vs



CO works with firms

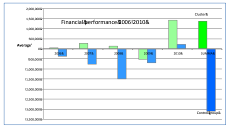
CO = Cluster

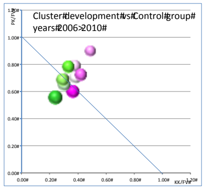
The Cluster Observatory Evaluation Model
Four Complementary Components

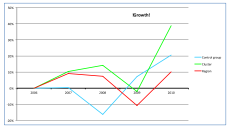


I

1. Company Financial Performance
(Collection/Cluster definition/Control groups)
A. Value added
B. Wages
C. Profitability
2. Statistical Analysis

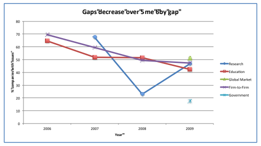






II

1. Surveys of member firms/organizations in cluster
2. Surveys of cluster organisations
3. Surveys of social media (text analysis)



III

1. Interviews
(process tracing/confirmation stats)
A. Member firms/organisations
B. Cluster Leader
C. Cluster Organisation Board
2. Participatory observation

IV

1. Benchmarking with other...
A. Regions
B. Clusters
C. Cluster organisations
2. Peer Evaluation Teams