

Clusters and Cluster Policy in Europe

Professor Örjan Sölvell



1.EU and Cluster Policy

2.Science – Innovation – Clusters

3.The European Cluster Observatory



WHAT THE EUROPEAN UNION DOES BY SUBJECT

- Agriculture
- Audiovisual and Media
- Budget
- Competition
- Consumers
- Culture
- Customs
- Development
- Economic and Monetary Affairs
- Education, Training, Youth
- Employment and Social Affairs
- Energy
- Enlargement
- Enterprise
- Environment
- External Relations
- External Trade
- Fight against fraud
- Fisheries and Maritime Affairs
- Food Safety
- Foreign and Security Policy
- Humanitarian aid
- Human rights
- Information Society
- Institutional affairs
- Internal Market
- Justice, freedom and security
- Public Health
- Regional Policy
- Research and Innovation
- Taxation
- Transport



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The Lisbon Strategy

“The most dynamic and **competitive** knowledge-based economy in the world capable of sustainable economic **growth** with more and better jobs and greater **social cohesion**, and respect for the **environment** by 2010”

EU and Clusters – Three Policy Areas

Competitiveness

Enterprise &
Innovation

Clusters



Competitiveness

Regions

Clusters



Competitiveness

Research

Clusters





DG
Internal
Market

**Microeconomic Framework
Conditions =
Policies for Clusters**

Cluster Policy & Programs =

Industry & Enterprise Policy

Regional Policy

Science Policy



DG
Enterprise



DG
Regio



DG
Research

EU and Lisbon Strategy



Critical Parts of the Lisbon Strategy:

- Research (ERA, 3% of GDP 2010, FP 7, European Research Council)
- Intellectual Property (EU Patent)
- Competition (Internal market)
- Public-private cooperation (European Technology Platforms)
- Innovation (EIT, Lead market, CIP)
- Supporting SMEs



EU and Clusters – A Careful Start



First meeting by DG Enterprise in Luxembourg in **2003** – Focus on clusters

Several studies around the time of accession of EU-10 countries: Phase I = **map** clusters of Eastern Europe, 2004/2005

Innovation Strategy – 2006

Innovation + Clusters = True

COMMUNICATION FROM THE COMMISSION TO THE COUNCIL, THE EUROPEAN PARLIAMENT, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS



The Aho Report

Putting knowledge into practice: A broad-based innovation strategy for the EU

2.4. Promoting cooperation between stakeholders

Being part of a cluster is an important competitive strength for business. Clusters help to close the gap between business, research and resources, thereby bringing knowledge faster to the market. Successful clusters promote intense competition along with co-operation. They enhance productivity, attract investment, promote research, strengthen the industrial base, and develop specific products or services and become a focus for developing skills. World-class clusters attract brilliant minds that sustain innovation – Silicon Valley is the best-known example.

EU and Clusters 2008

Central to Lisbon Strategy

Database part of Europe INNOVA/PRO INNO/Cluster Alliance: Phase II = European Cluster Observatory, 2007

Need for better informed policies – number of cluster programs and cluster initiatives growing rapidly - European Cluster Memorandum 4x5 Principles, 2008

New call in 2009-2012 under CIP: Phase III



THE EUROPEAN CLUSTER MEMORANDUM

Promoting European Innovation
through Clusters :
An Agenda for Policy Action

Prepared by
The High Level Advisory Group on Clusters,
chaired by Senator Pierre Laffitte.

This work is coordinated
by the Center for Strategy and Competitiveness,
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- Now we need an innovation and cluster strategy!
- We need better and deeper information through the Cluster Observatory!
- And we need a European high-level Advisory and Monitoring Group for Innovation and Clusters!

Milestones 2008 – Cluster Policy



**Stockholm January 2008 (Chair: Slovenia/Sweden)
EU Ministers of Industry/Enterprise**

Lyon October 2008 (INNOVA)

**Sophia Antipolis November 2008 (Chair: France)
EU Ministers of Industry/Enterprise**



Future: DG Enterprise and Clusters



Cluster policy group

- Around 20 people
Policy, industry, experts
- Secretariat



European Cluster Alliance

- INNO-Net
- Think tank
- Policy learning
- Continue to promote the Memorandum

European Cluster Observatory

- New data and analysis
- Platform for SMEs

Cluster Academy

- Training of cluster managers
- Certification

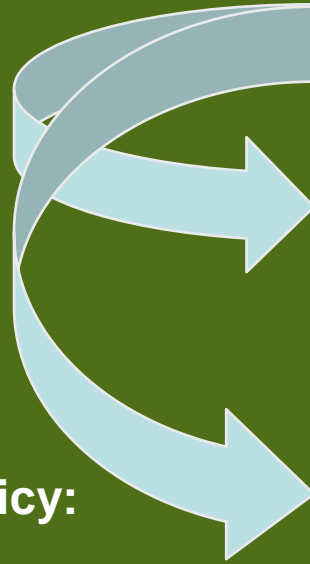
Cluster Networks

- Energy
- ECO-innovation
- Biotech

EU and Clusters

The EU Role – Policy for Clusters:

1. Single Market



The EU Role – Cluster Policy:

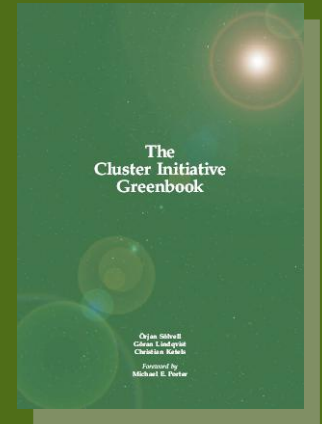
1. Inspire cluster initiatives
2. Fact-based policy
3. Cluster networking
4. Cluster manager training
5. Policy learning



Cluster Initiatives

Public-Private-Academic Organized Efforts:

1. Human Resources
2. Cluster expansion
3. Commercial cooperation
4. Internationalization
5. Innovation & technology
6. Business environment



Intelligent Vehicle Safety Systems – IVSS:

Saab
Volvo
Volvo Cars
Scania
Vägverket
Scandinavian Automotive Suppliers
Invest in Sweden Agency
Vinnova

Automotive Crash Research – SAFER:

Chalmers University
Vinnova
Automotive firms

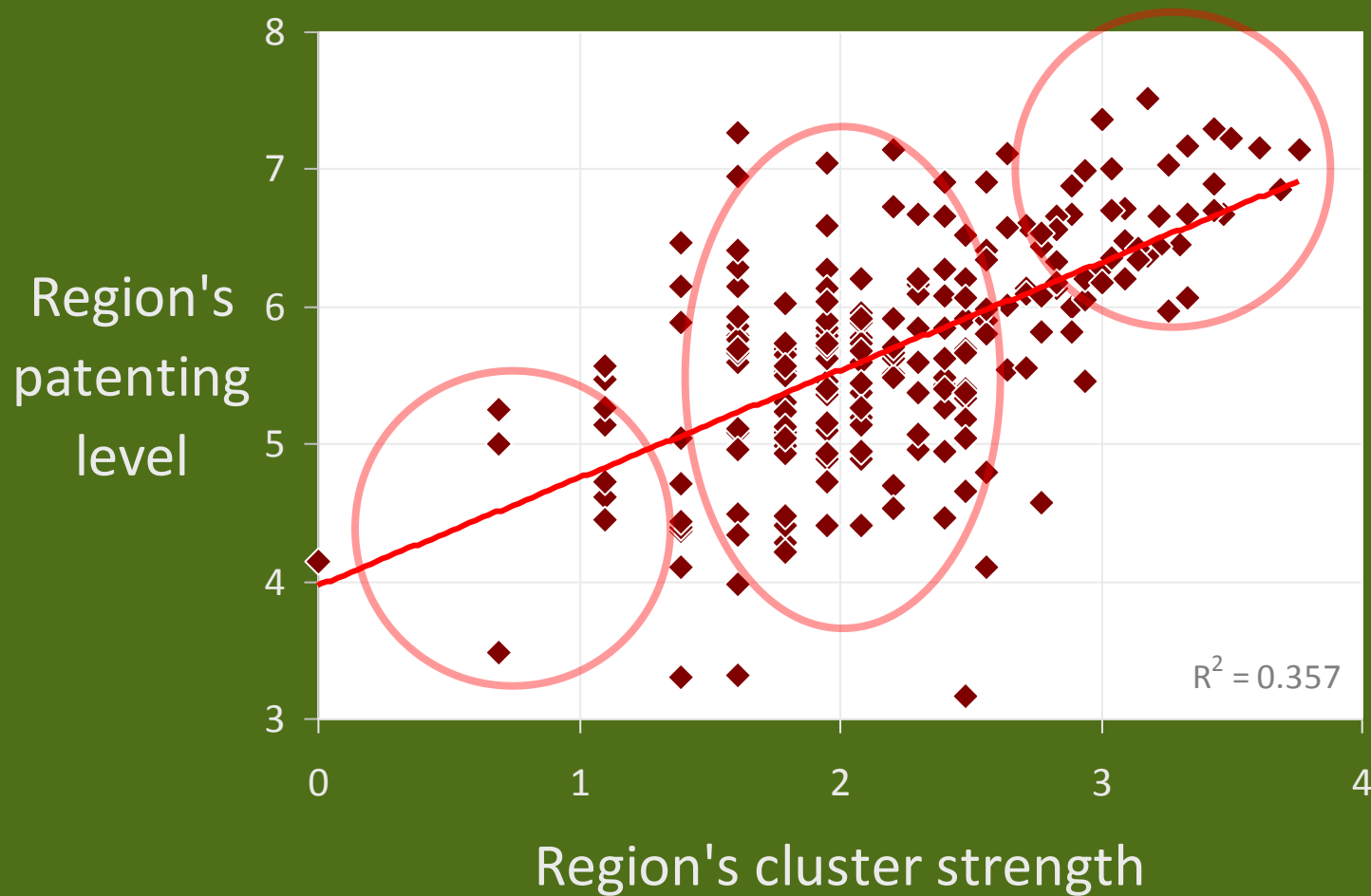


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Clusters = Innovation



Each region's number of cluster stars (log) vs its number of patents (log), adjusting for country-level differences other than cluster strength.
Source: The European Cluster Observatory

Clusters



- Finance:**
- Banks
 - Venture Capital
 - Business angels



- Industry:**
- Buyers
 - Suppliers
 - Related industries
 - SMEs
 - Services



- Public bodies:**
- Regional authorities
 - Agencies



Media



- University:**
- Colleges
 - Tech transfer offices
 - Laboratories



- Organisations for Collaboration:**
- Formal and informal networks
 - Trade associations
 - Cluster organisations

CERN and Geneva



R&D

SLAC and Silicon Valley



R&D

+

Innovation & Clusters

JINR and Dubna



Science
R&D



Innovation
and Clusters



Joint Institute for Nuclear Research (JINR):

18 members (Armenia, Azerbaijan, Belarus, Bulgaria, China, Cuba, Czech Republic, Georgia, Kazakhstan, Moldova, Mongolia, North Korea, Poland, Romania, Russia, Slovakia, Ukraine, Uzbekistan, Vietnam)

Founded 1956

8 laboratories and university centers

5,500 staff + 1,200 researchers (>1,000 PhDs)

Free Economic Zone:

Registered 2,000 start-ups in 2 years – no international success so far
New state corporation for nano-technology (5.5 billion USD)



Europe needs to shift focus from R&D and Science to Innovation and Clusters



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European Cluster Observatory www.clusterobservatory.eu

Cluster policy

Cluster Policy Report
UNITED KINGDOM

Cluster data

Cluster Mapping Database

Region: Europe, all | Cluster category: Biopharma | Filter: 1-3 stars

Cluster	Employees	Size	Spec.	Focus	Stars	Innovation	Exports	Notes
Nordwestschweiz (Basel), CH	21 741	2.64%	8.87	3.97%	***	N/A		
Île de France (Paris), FR	47 493	5.78%	2.27	1.61%	**	High	Strong	
Lazio (Rome), IT	21 990	2.67%	2.40	1.07%	**	High	Strong	
Istanbul, TR	20 563	2.50%	2.66	1.19%	**	N/A	Weak	
Darmstadt (Frankfurt am Main), DE	16 459	2.00%	2.64	1.18%	**	High	Strong	
Kecap-Magyarország (Budapest), HU	14 197	1.73%	2.62	1.17%	**	High	Weak	
Centre (Orléans), FR	13 960	1.70%	4.36	1.95%	**	Medium	Strong	
Karlsruhe, DE	13 207	1.65%	3.11	1.39%	**	High	Strong	
Mazowieckie (Warszawa), PL	11 522	1.40%	2.27	1.61%	**	Medium	Weak	
Berlin, DE	10 350	1.26%	2.27	1.02%	**	High	Strong	
Stockholm, SE	10 325	1.26%	2.39	1.67%	**	High	Strong	
Tübingen, DE	9 650	1.17%	3.68	1.65%	**	High	Strong	
Freiburg, DE	9 591	1.17%	3.09	1.38%	**	High	Strong	
Region Wallonne (Lège), BE	9 454	1.15%	2.31	1.03%	**	Medium	Strong	
Rheinhausen-Platz (Mainz), DE	9 051	1.02%	3.45	1.54%	**	High	Strong	
Lombardia (Milan), IT	34 808	4.23%	1.91	0.85%	+	Medium	Strong	
Cataluña (Barcelona), ES	25 485	3.10%	1.78	0.80%	+	Medium	Strong	
Madrid, ES	19 397	2.36%	1.54	0.69%	+	High	Strong	

Cluster maps

Map of Europe showing cluster locations with star ratings.

Cluster organisations

Region(s)	Cluster organisation	Website
Burgund, Wien, Niederösterreich, Oberösterreich	Automotive Cluster Vienna Region	www.acvr.at
Wallonie	Cluster Auto- Mobilité de Wallonie	www.clusterautomobile.be
Halle	MARREG Automotive	www.marreg.de
Köln	Car	www.car-saachen.de
Saarland	automotive.saarland	www.automotive.saarland.de
Denmark	AluCluster	www.alucluster.com
Pais Vasco	ACICAE	www.acicae.es
Galicia	Cluster de Empresas de Automoción de Galicia	www.ceaga.com
Hedmark og Oppland	Arena Lettmetall	www.total-gruppen.no
Slovenia	Business Interest Association ACS, Automotive Cluster of Slovenia	www.aci-giz.si
Sydsverige	Networking Companies	www.networkingcompanies.se
Sydsverige, Småland	Aluminiumket	www.aluminiumket.com

Statistical Cluster Mapping

Star Map

Cluster mapping

Cluster orgs

Cluster policy

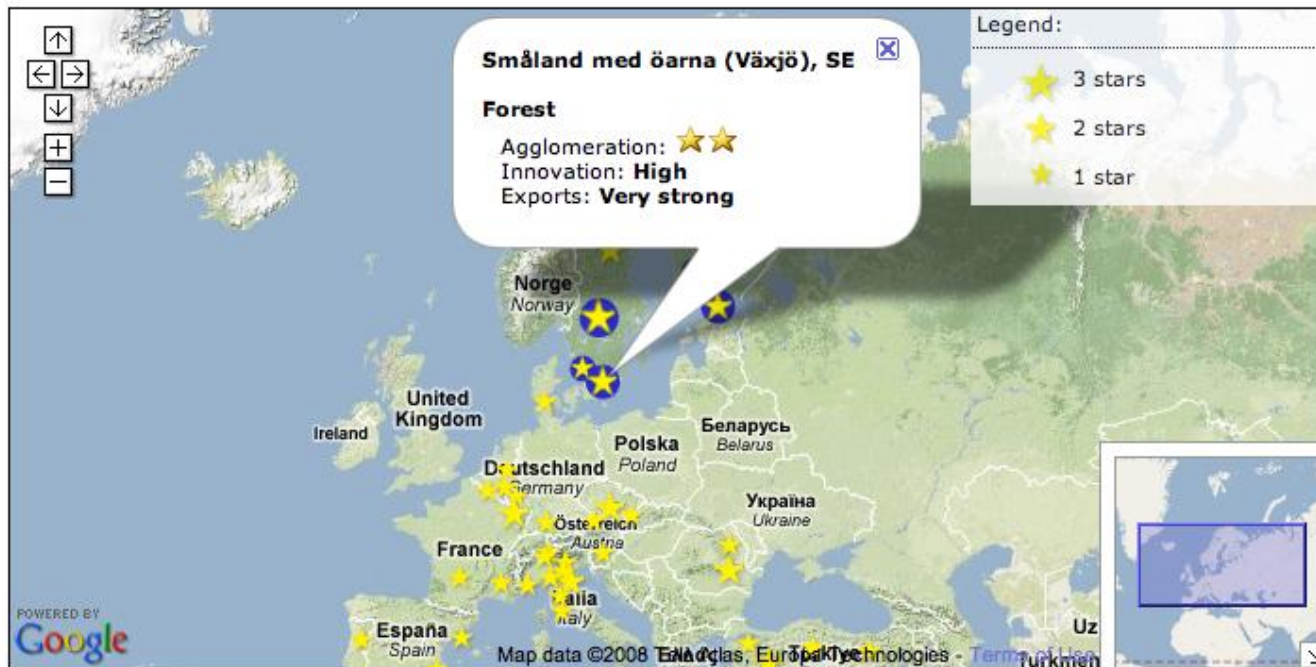
Cluster library

Region Europe, all <small>» Select country/region</small>	Cluster category Forest <small>» Select cluster category</small>	Data Type Stars <small>» Select Data Type</small>
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map table

Forest Products regional clusters in Europe

1, 2 and 3 star regional clusters



Please click on a region to see more information.

★ - blue background indicates that the cluster is situated in a region with high innovation performance and that the country has very strong exports in the given cluster category.

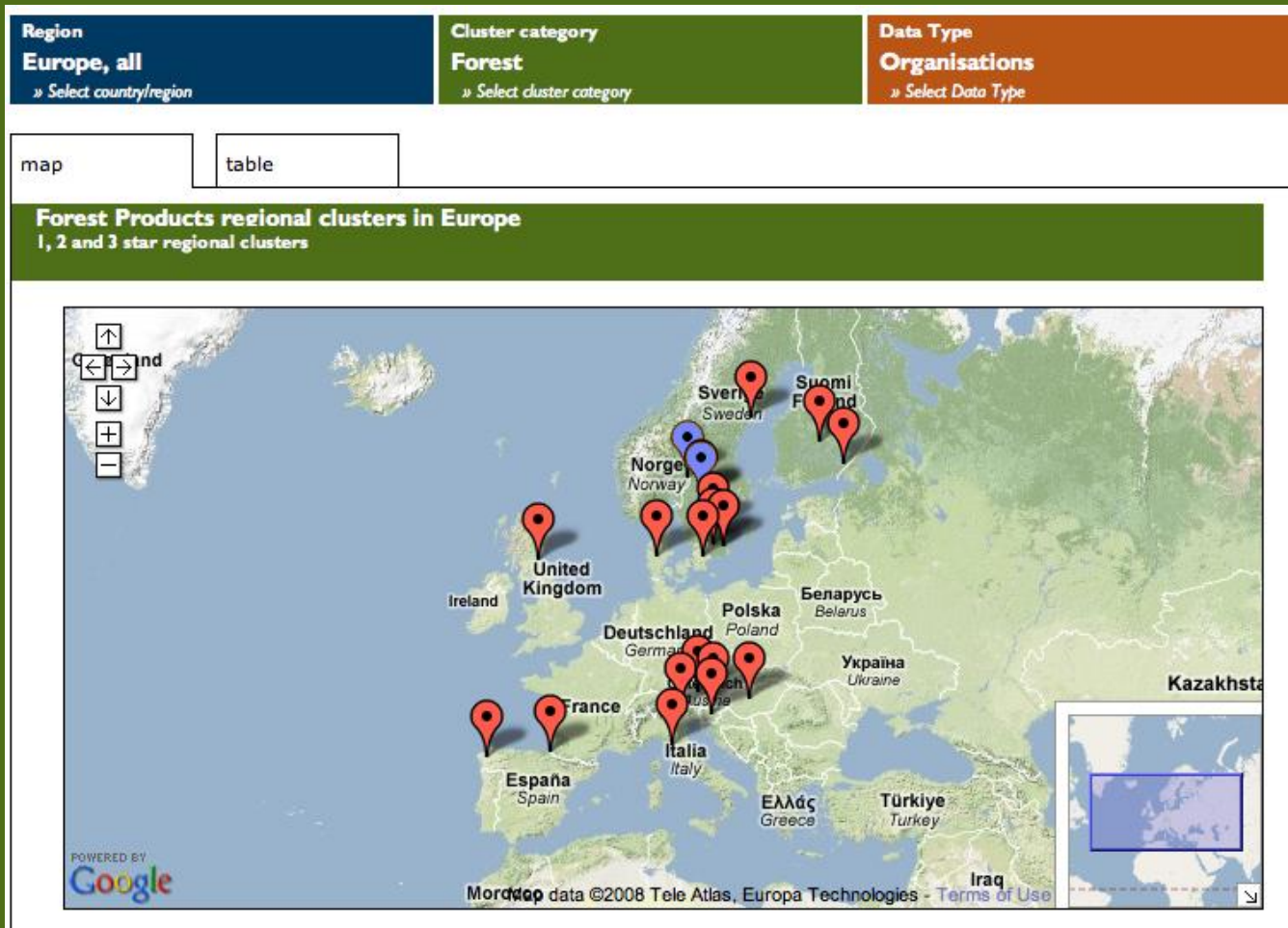
Cluster Organisation Map

Cluster mapping

Cluster orgs

Cluster policy

Cluster library



Karlstad – Pulp and Paper

Region Norra Mellansverige, Sweden » Select country/region	Cluster category Forest » Select cluster category	Data Type Organisations » Select Data Type
--	---	--

map table



Forest Products regional clusters in Norra Mellansverige, SE
1, 2 and 3 star regional clusters

The Paper Province
Norra Mellansverige (Gävle), SE
Forest Products

Map data ©2008 Tele Atlas - [Terms of Use](#)



Cluster Organisation Table

Region Europe, all » Select country/region	Cluster category Forest » Select cluster category	Data Type Organisations » Select Data Type		
map	table			
Forest Products regional clusters in Europe 1, 2 and 3 star regional clusters				
Logo	Organisations	Region	Clusters	Website
	The Paper Province	Norra Mellansverige (Gävle), SE	Forest Products	www.paperprovince.com
	Tretorget AS	Hedmark og Oppland (Lillehammer), NO	Forest Products	www.tretorget.no
	Basque Paper Cluster	País Vasco (Bilbao), ES	Forest Products	www.clusterpapel.com/ingles
	Central-Transdanubia Wood and Furniture Industry Cluster	Közep-Dunantul (Székesfehérvár), HU	Forest Products	www.kdrfu.hu
	Cooperation and Innovation Award	Galicia (A Coruña), ES	Forest Products	www.clustermadera.com
	Distretto Cartario – Paper Cluster	Toscana (Florence), IT	Forest Products	www.distrettocartario.it
	Holzcluster Salzburg	Salzburg, AT	Forest Products	www.holzcluster.at
	Holzcluster Steiermark	Steiermark (Graz), AT	Forest Products	www.holzcluster-steiermark.at
		Småland med Öarna	Forest	

Adding New Members....

Cluster mapping

Cluster orgs

Cluster policy

Cluster library



Thank you!

www.clusterobservatory.eu