

Clusters and Cluster Policy in Europe

Professor Örjan Sölvell



CENTER FOR STRATEGY AND
COMPETITIVENESS

1.EU and Clusters

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



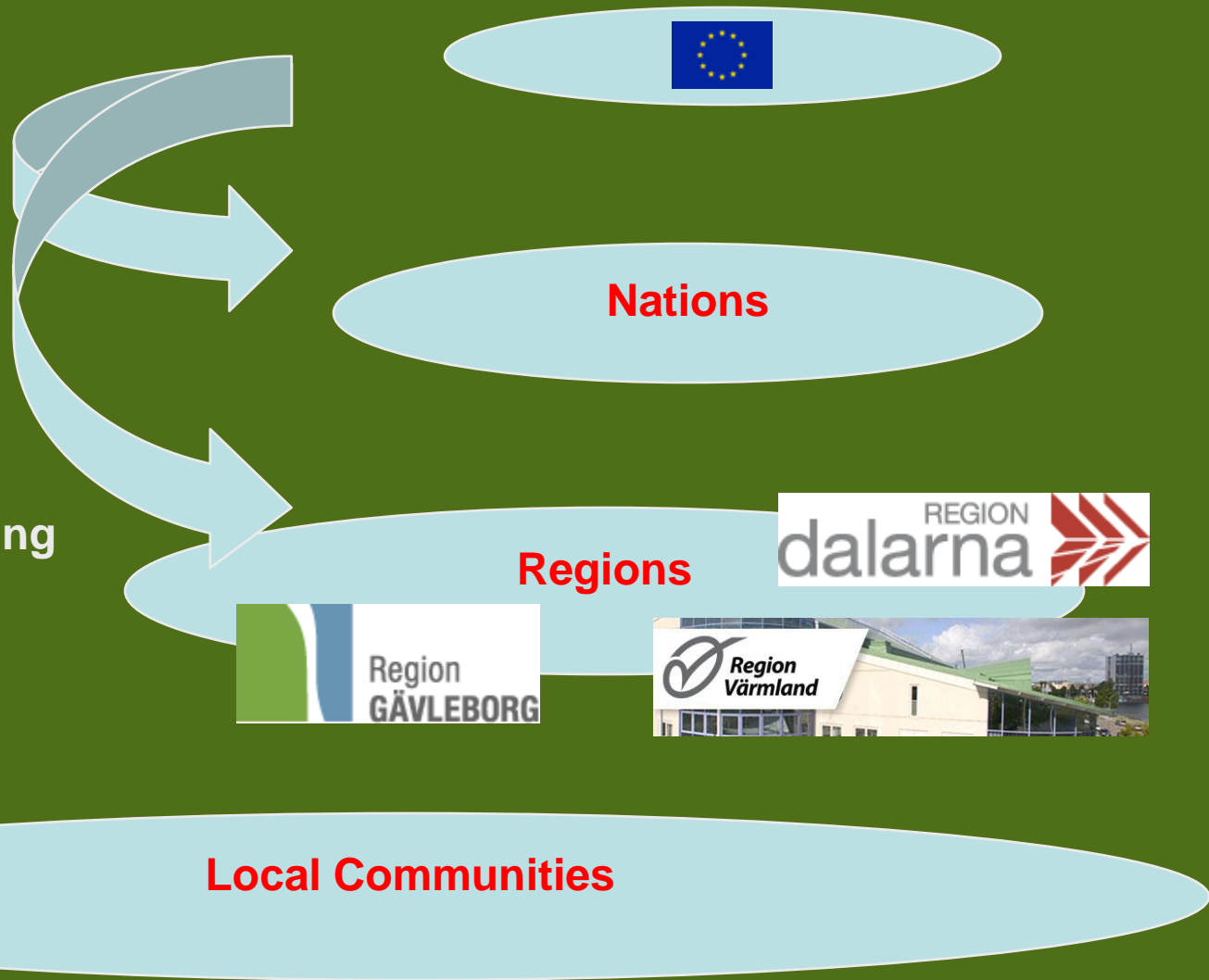
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EU and Clusters

The EU Role:

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



EU and Clusters

**Competitiveness
Innovation
Clusters**



Critical Parts of the **Lisbon Strategy**:

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

• **Industry & Enterprise**

• **Regional**

• **Science**

EU and Clusters – a Background

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

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

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

New call in 2008 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 Centre for Strategy and Competitiveness,
Stockholm School of Economics and performed
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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 – Cluster Policy

Stockholm January 2008 (Chair: Slovenia/Sweden)

Lyon October 2008 (INNOVA)

Sophia Antipolis November 2008 (Chair: France)



Future: DG Enterprise and Clusters



Cluster policy group

- Around 20 people
- Policy, industry, experts
- 18 month work
- Secretariat



European Cluster Alliance

- INNO-Net
- Think tank
- Study teams
- Continue to promote the Memorandum

European Cluster Observatory

- New data and analysis
- Platform for SMEs – find out value of clusters

Cluster Academy

- Training of cluster managers
- Certification

Cluster Innovation Platforms

- Energy
- ECO-innovation
- Biotech

Future: DG Regio and Clusters



Regions for Economic Change 2007-2013

Interreg IV C:
Innovation & the Knowledge economy
(Environment & Risk prevention)



Cluster & Cities Network: Improve Cluster Policy Support in City Regions:

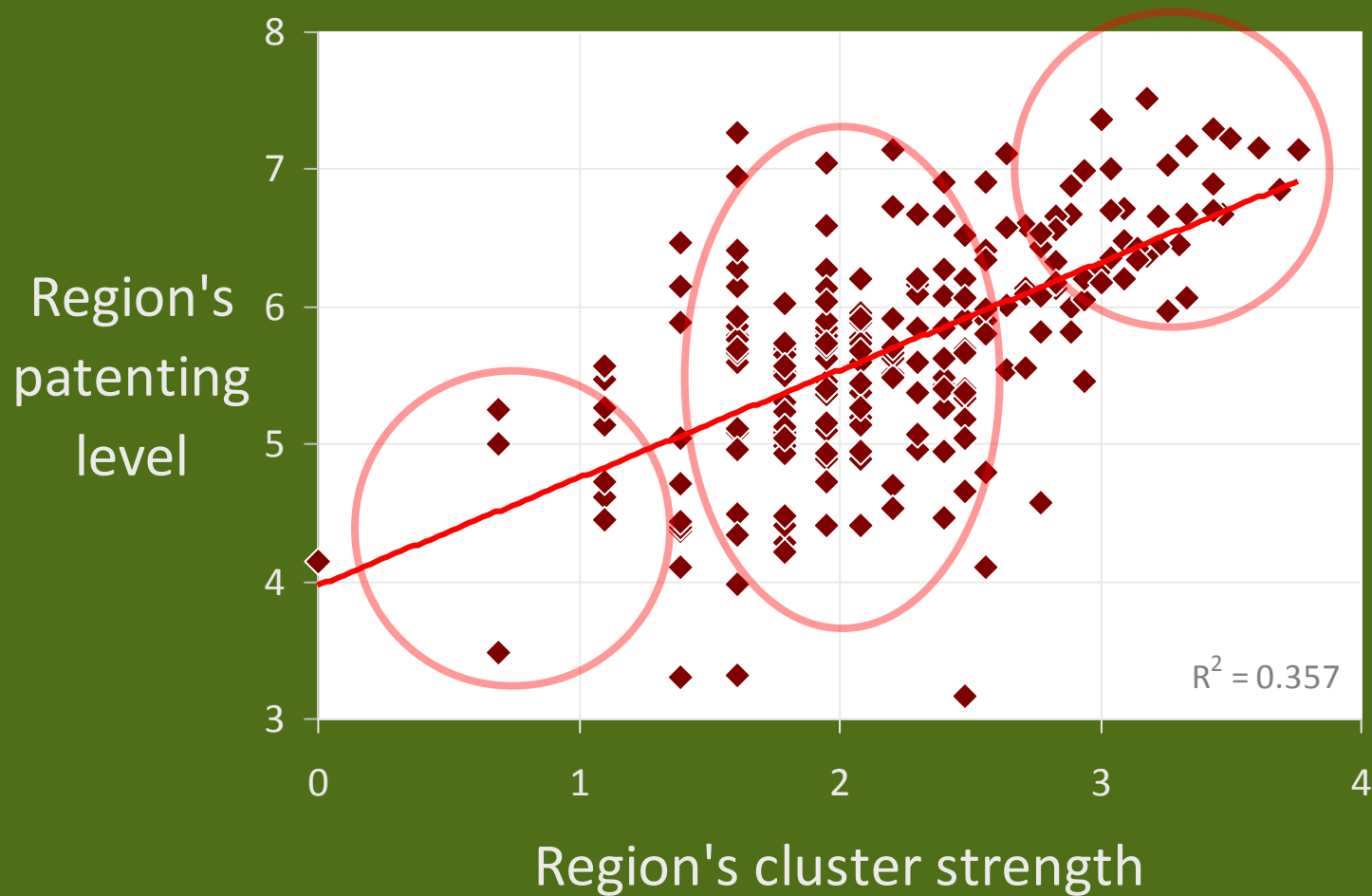
Lyon (lead partner)
Barcelona
Munich
Dortmund
Leipzig
Manchester
Helsinki
Budapest
Gothenburg
Eindhoven

1.EU and Clusters

2.Science – Innovation – Clusters

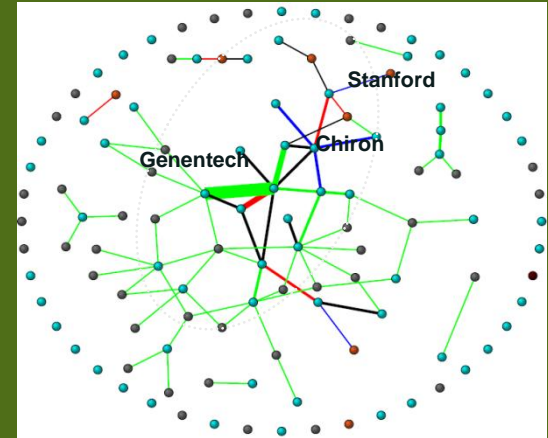
3.The European Cluster Observatory

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



Media



Public bodies:

- Regional authorities
- Agencies



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, including the firm IBS
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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2.Science – Innovation – Clusters

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European Cluster Observatory

www.clusterobservatory.eu

Cluster policy

Cluster Policy Report UNITED KINGDOM

Cluster data

Cluster maps

Cluster organisations

European Cluster Observatory - Microsoft Internet Explorer

Address: http://www.clusterobservatory.eu/index.php?country_ID=region_ID=cluster_ID=39

European Cluster Observatory

Cluster Mapping Database

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Cluster Mapping
Cluster Organisations
Cluster Policies
Cluster Library
Join Observatory
Methodology
Links

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

table map graph

Biopharmaceuticals regional clusters in Europe
1, 2 and 3 star regional clusters

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	1.01%	**	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-Mayarország (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	
Varsovie, DE	13 207	1.61%	3.11	1.39%	**	High	Strong	
Mazowieckie (Warszawa), PL	11 522	1.40%	2.27	1.01%	**	Medium	Weak	
Berlin, DE	10 350	1.26%	2.27	1.02%	**	High	Strong	
Stockholm, SE	10 325	1.26%	2.39	1.07%	**	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 Wallonie (Lège), BE	9 454	1.15%	2.31	1.03%	**	Medium		
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	

Innovation: Data is for region, regardless of cluster category. Based on 2006 European Regional Innovation Scoreboard.
Exports: Data is national export data for the cluster category, regardless of region. Based on International Cluster

European Cluster Observatory - Microsoft Internet Explorer

Address: http://www.clusterobservatory.eu/index.php?id=30

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Region(s):
Cluster organisation:
Website:

Region(s)	Cluster organisation	Website
Burgund, Wien, Niederösterreich, Oberösterreich	Automotive Cluster Vienna Region	www.acv.at
Wallonie	Automobil-Cluster	www.automobil-cluster.at
Halle	Cluster Auto-Mobilité de Wallonie	www.clusterautomobilite.be
Köln	MARIEG Automotive	www.mahreg.de
Saarland	Car	www.car-saachen.de
Denmark	automotive.saarland	www.automotive.saarland.de
Pais Vasco	AluCluster	www.alucluster.com
Galicie	ACICAE	www.acicae.es
Hedmark og Oppland	Cluster de Empresas de Automoción de Galicia	www.ceaga.com
Slovenia	Arena Lettmetall	www.total-gruppen.no
Sydsverige	Business Interest Association ACS, Automotive Cluster of Slovenia	www.acs-giz.si
Sydsverige, Småland	Networking Companies	www.networkingcompanies.se
	Aluminiummet	www.aluminiummet.com

European Cluster Observatory - Microsoft Internet Explorer

Address: http://www.clusterobservatory.eu/upload/map_star_all_auto_all_20070613_fullsize.jpg

European Cluster Observatory

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

table map graph

Biopharmaceuticals regional clusters in Europe
1, 2 and 3 star regional clusters

© European Cluster Observatory. No. 2/2007 cluster codes 1.0, 2.0, 3.0, 4.0, 5.0, 6.0, 7.0, 8.0, 9.0, 10.0, 11.0, 12.0, 13.0, 14.0, 15.0, 16.0, 17.0, 18.0, 19.0, 20.0, 21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0, 31.0, 32.0, 33.0, 34.0, 35.0, 36.0, 37.0, 38.0, 39.0, 40.0, 41.0, 42.0, 43.0, 44.0, 45.0, 46.0, 47.0, 48.0, 49.0, 50.0, 51.0, 52.0, 53.0, 54.0, 55.0, 56.0, 57.0, 58.0, 59.0, 60.0, 61.0, 62.0, 63.0, 64.0, 65.0, 66.0, 67.0, 68.0, 69.0, 70.0, 71.0, 72.0, 73.0, 74.0, 75.0, 76.0, 77.0, 78.0, 79.0, 80.0, 81.0, 82.0, 83.0, 84.0, 85.0, 86.0, 87.0, 88.0, 89.0, 90.0, 91.0, 92.0, 93.0, 94.0, 95.0, 96.0, 97.0, 98.0, 99.0, 100.0, 101.0, 102.0, 103.0, 104.0, 105.0, 106.0, 107.0, 108.0, 109.0, 110.0, 111.0, 112.0, 113.0, 114.0, 115.0, 116.0, 117.0, 118.0, 119.0, 120.0, 121.0, 122.0, 123.0, 124.0, 125.0, 126.0, 127.0, 128.0, 129.0, 130.0, 131.0, 132.0, 133.0, 134.0, 135.0, 136.0, 137.0, 138.0, 139.0, 140.0, 141.0, 142.0, 143.0, 144.0, 145.0, 146.0, 147.0, 148.0, 149.0, 150.0, 151.0, 152.0, 153.0, 154.0, 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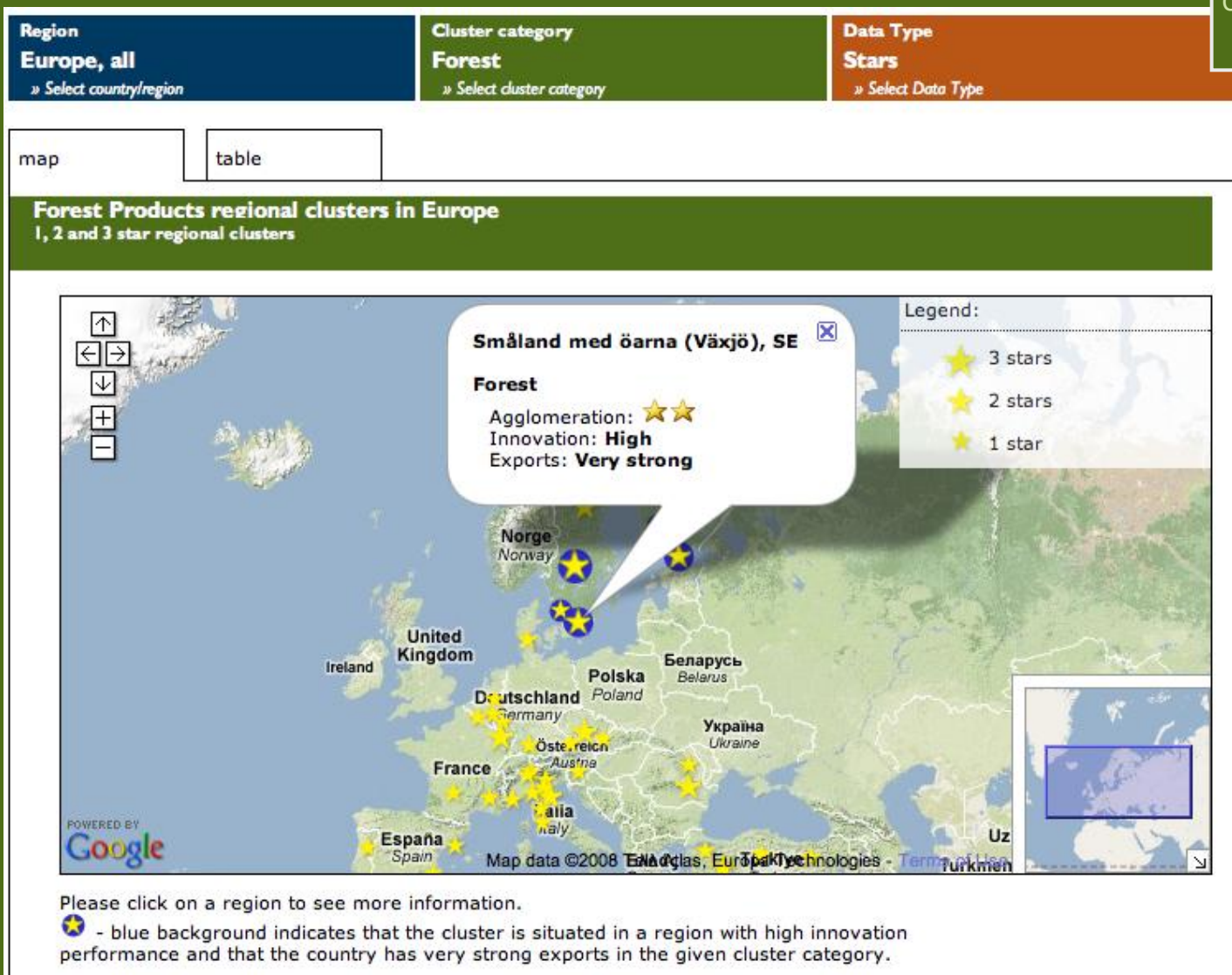
Star map

Cluster
mapping

Cluster
orgs

Cluster
policy

Cluster
library



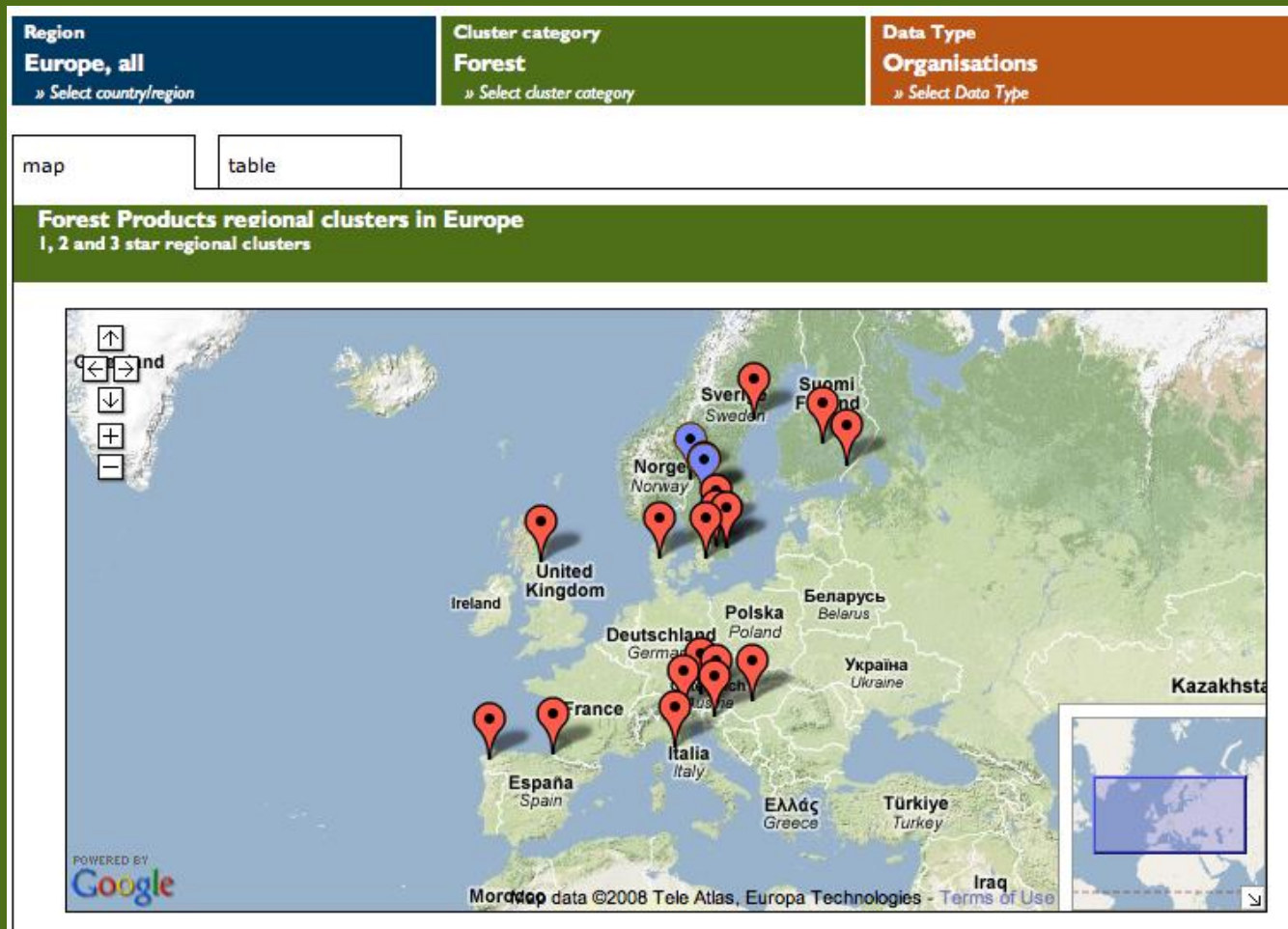
Organisation map

Cluster
mapping

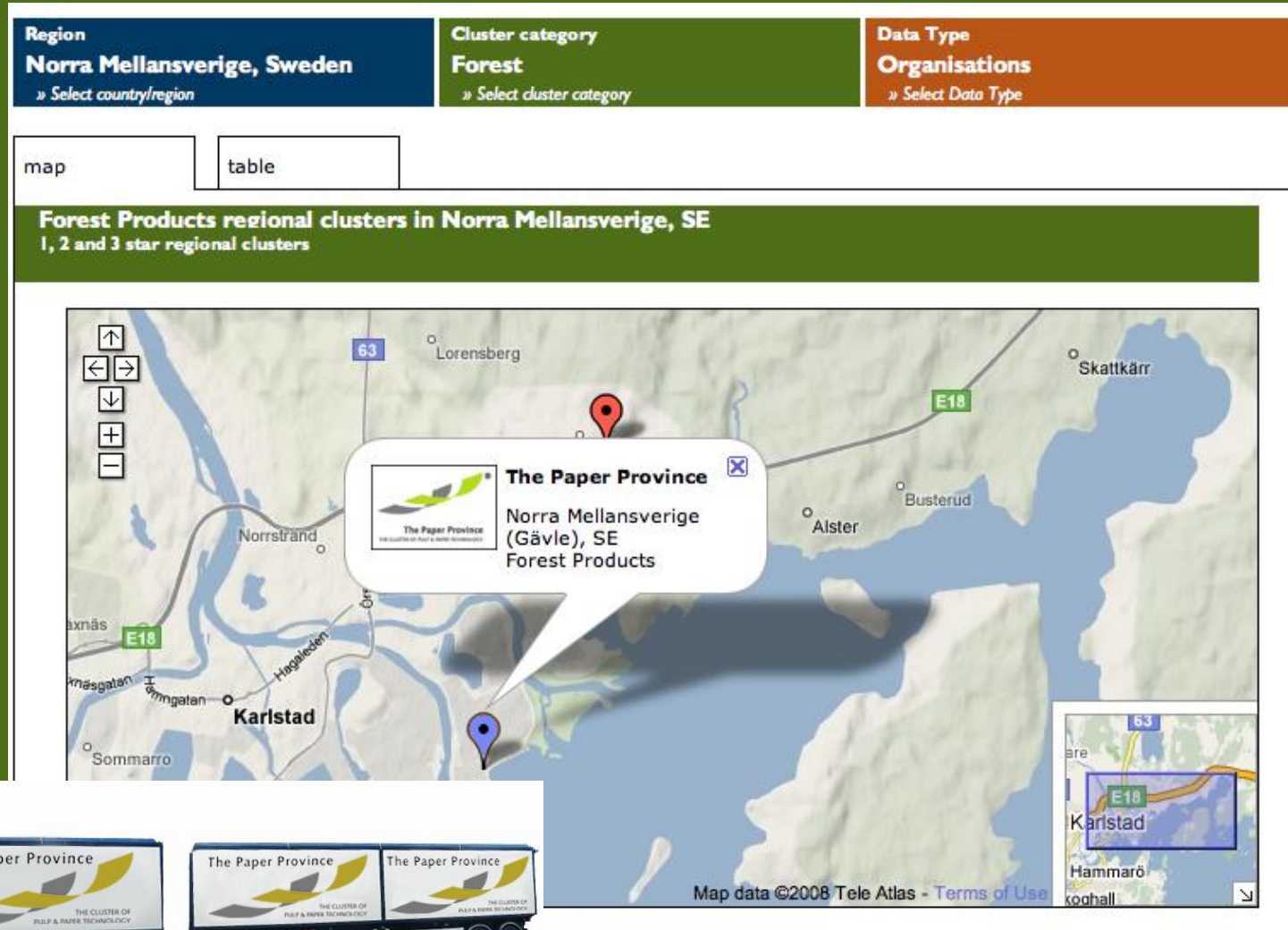
Cluster
orgs

Cluster
policy

Cluster
library



Karlstad – Pulp and Paper



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



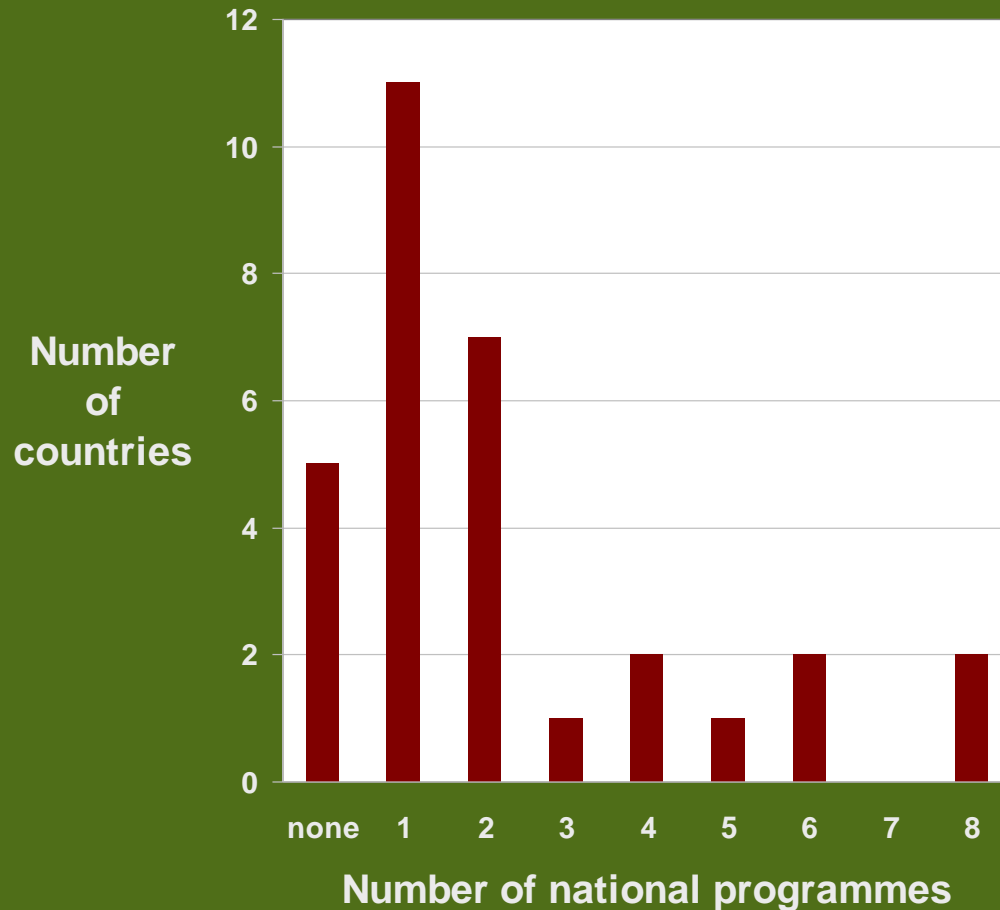
National cluster programmes

Cluster
mapping

Cluster
orgs

Cluster
policy

Cluster
library



- National cluster programmes are found in 26 out of the 31 countries.
- In total 69 national cluster programmes have been identified.
- The majority of the countries have one or two programmes.

Cluster policies gaining momentum

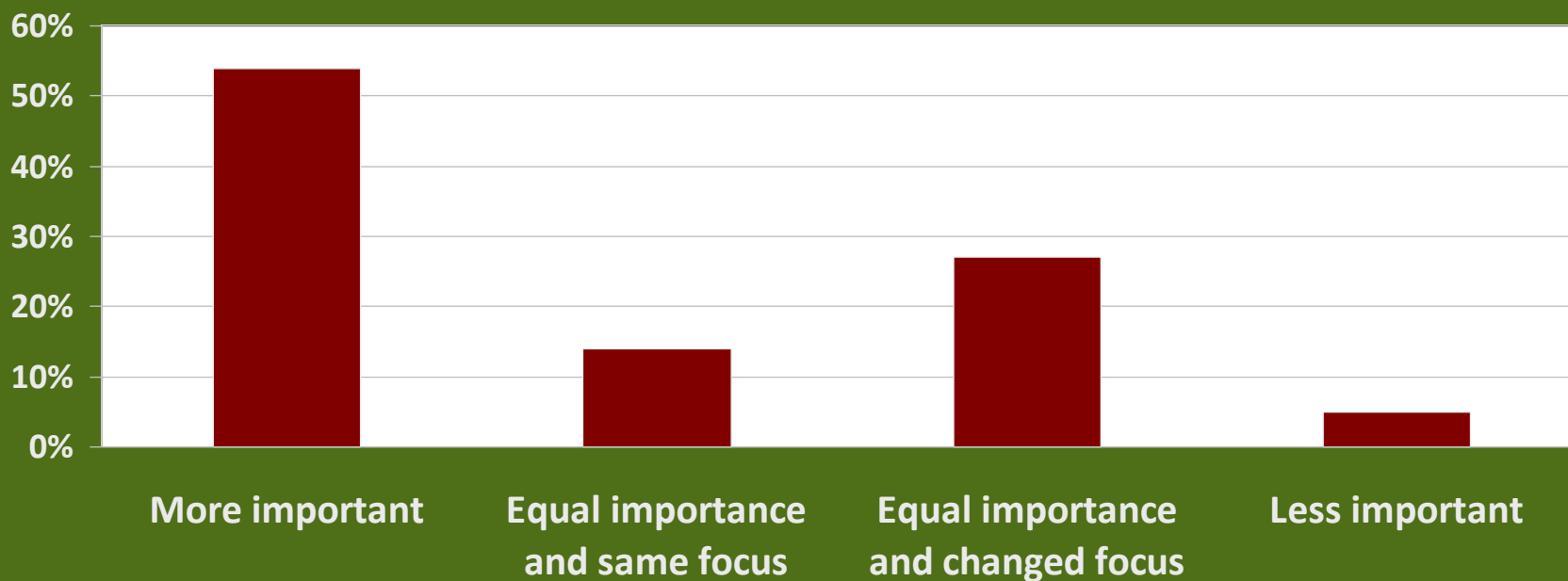
Cluster
mapping

Cluster
orgs

Cluster
policy

Cluster
library

Importance of cluster policy over time



- Cluster policy is still at an early stage in many countries. Around half the countries started applying cluster policy only after 1999.

EU and Clusters

The EU Role:

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



Tack!

[www[✦]clusterobservatory[✦]eu](http://www.clusterobservatory.eu)