1. EU and Cluster Policy
2. Science – Innovation – Clusters
3. The European Cluster Observatory
<table>
<thead>
<tr>
<th>Agriculture</th>
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<tr>
<td>Audiovisual and Media</td>
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<td>Transport</td>
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WHAT THE EUROPEAN UNION DOES BY SUBJECT

- Agriculture
- Audiovisual and Media
- Budget
- Competition
- Consumers
- Culture
- Customs
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- Education, Training, Youth
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- Transport

http://europa.eu/index_en.htm
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 & Industry

Clusters

Regions

Competitiveness

Research

Clusters
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 2003-

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
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

Stockholm January 2008 (Chair: Slovenia/Sweden)

Sophia Antipolis November 2008 (Chair France)

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
Europe is not narrowing the innovation gap to the U.S.

Innovation takes place in clusters.

Europe can build world-class clusters through:
- pushing the internal market
- strengthening the general environment for research and innovation
- strengthening cluster programs and initiatives
- forming European-wide programs for transnational cluster interaction.

Many EU initiatives have been launched:
- DG Enterprise
- DG Science
- DG Regio
- The Committee of the Regions

The Competitiveness Council has identified clusters as one of nine priority actions.

Many national and regional initiatives are well under way.
• 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!
Cluster policy group
- Around 20 people
  Policy, industry, experts
- Secretariat

European Cluster Observatory
- New data and analysis
- Platform for SMEs

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

Cluster Networks
- Energy
- ECO-innovation
- Biotech

Cluster Academy
- Training of cluster managers
- Certification
Cluster Construction – Top Down

The EU Role

Policy for Clusters
1. Single Market
2. Trade
3. Competition
4. Science
5. Innovation

Cluster Policy
1. Inspire cluster initiatives
2. Fact-based policy/evaluation
3. Cluster networking
4. Cluster manager training
5. Policy learning
Cluster Construction – Bottom-up

Organic Clusters

Cluster initiatives

Planned Clusters

Public bodies

Org. for collaboration

Research and Education

Industry
Cluster Initiatives

Public-Private-Academic Organized Efforts:

1. Human Resources
2. Cluster expansion
3. Commercial cooperation
4. Business development
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
Clusters
Balancing Evolutionary and Constructive Forces
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

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

Finance:
- Banks
- Venture Capital
- Business angels

Public bodies:
- Regional authorities
- Agencies

University:
- Colleges
- Tech transfer offices
- Laboratories

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

Menlo Park
Stanford
Palo Alto
SLAC
Cupertino
CERN and Geneva

SLAC and Silicon Valley

R&D

R&D

+ Innovation & 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
1. EU and Clusters

2. Science – Innovation – Clusters

3. The European Cluster Observatory
European Cluster Observatory
www.clusterobservatory.eu
Statistical Cluster Mapping
Star Map

Forest Products regional clusters in Europe
1, 2 and 3 star regional clusters

Småland med öarna (Växjö), SE
Forest
Agglomeration: ★★
Innovation: High
Exports: Very strong

Legend:
★ 3 stars
★★ 2 stars
★★★ 1 star

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.
Out of ~10,000 potential clusters in Europe:

~ 1,300 One-star clusters

~ 500 Two-star clusters

~ 150 Three-star clusters
Cluster Organisation Map

Forest Products regional clusters in Europe
1, 2 and 3 star regional clusters
Karlstad – Pulp and Paper
### Cluster Organisation Table

**Forest Products regional clusters in Europe**

<table>
<thead>
<tr>
<th>Logo</th>
<th>Organisations</th>
<th>Region</th>
<th>Clusters</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="The Paper Province" /></td>
<td>The Paper Province</td>
<td>Norra Mellansverge (Gävle), SE</td>
<td>Forest Products</td>
<td><a href="http://www.paperprovince.com">www.paperprovince.com</a></td>
</tr>
<tr>
<td><img src="image" alt="Tretorget AS" /></td>
<td>Tretorget AS</td>
<td>Hedmark og Oppland (Lillehammer), NO</td>
<td>Forest Products</td>
<td><a href="http://www.tretorget.no">www.tretorget.no</a></td>
</tr>
<tr>
<td><img src="image" alt="Basque Paper Cluster" /></td>
<td>Basque Paper Cluster</td>
<td>País Vasco (Bilbao), ES</td>
<td>Forest Products</td>
<td><a href="http://www.clusterpapel.com/ingles">www.clusterpapel.com/ingles</a></td>
</tr>
<tr>
<td><img src="image" alt="Central-Transdanubia Wood and Furniture Industry Cluster" /></td>
<td>Central-Transdanubia Wood and Furniture Industry Cluster</td>
<td>Kozep-Dunantul (Székesfehérvár), HU</td>
<td>Forest Products</td>
<td><a href="http://www.kdrfu.hu">www.kdrfu.hu</a></td>
</tr>
<tr>
<td><img src="image" alt="Cooperation and Innovation Award" /></td>
<td>Cooperation and Innovation Award</td>
<td>Galicia (A Coruña), ES</td>
<td>Forest Products</td>
<td><a href="http://www.clustermadera.com">www.clustermadera.com</a></td>
</tr>
<tr>
<td><img src="image" alt="Distretto Cartario - Paper Cluster" /></td>
<td>Distretto Cartario - Paper Cluster</td>
<td>Toscana (Florence), IT</td>
<td>Forest Products</td>
<td><a href="http://www.distrettocartario.it">www.distrettocartario.it</a></td>
</tr>
<tr>
<td><img src="image" alt="Holzcluster Salzburg" /></td>
<td>Holzcluster Salzburg</td>
<td>Salzburg, AT</td>
<td>Forest Products</td>
<td><a href="http://www.holzcluster.at">www.holzcluster.at</a></td>
</tr>
<tr>
<td><img src="image" alt="Holzcluster Steiermark" /></td>
<td>Holzcluster Steiermark</td>
<td>Steiermark (Graz), AT</td>
<td>Forest Products</td>
<td><a href="http://www.holzcluster-steiermark.at">www.holzcluster-steiermark.at</a></td>
</tr>
<tr>
<td><img src="image" alt="Småland med öarna" /></td>
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<td>Forest Products</td>
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Adding New Members....
Thank you!

www.clusterobservatory.eu