

Presentation of the Input Paper for Charleroi

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Economic profile of Wallonia

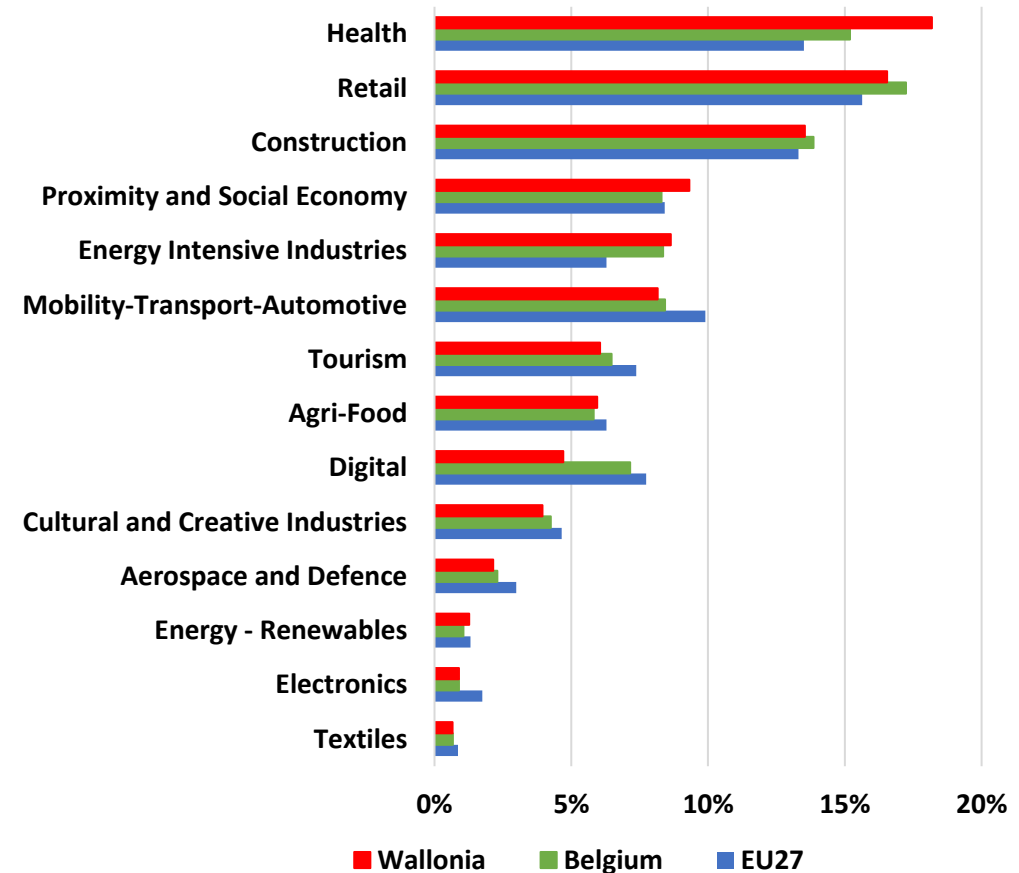
General trends in the regional economy:

- The region of Wallonia exhibited a **GDP of €126.7 billion**, and a **GDP per capita (PPS) of €30,700** (EU avg. €35,400)
- **Wallonia's exports totalled €53.7 billion in 2023**, with two-thirds directed to EU27 countries

Employment and GVA composition:

- The Walloon Region's economy is driven by a **strong public administration sector**, while **Health, Retail, and Construction** stand out as key industrial ecosystems
- Furthermore, the **Food sector** has an important role in the region's economy
- Other **key sectors** in Wallonia include aeronautics and space, environmental technologies, life sciences, engineering and new materials, transport and logistics, and digital

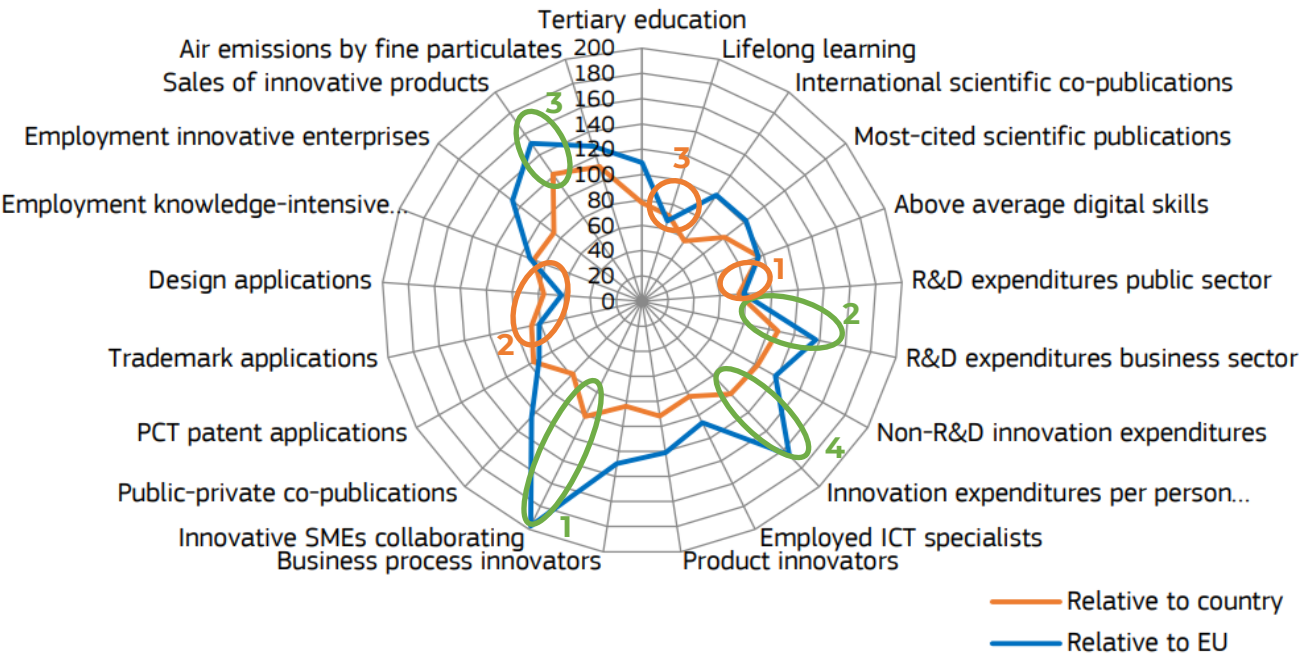
GVA shares across the Industrial Ecosystems



Source: ECCP (2024), own elaboration based on Eurostat.

Wallonia's regional innovation & competitiveness performance

RIS 2023: Wallonia (BE3) as a “Strong Innovator”



Relative Strengths according to the RIS 2023

1. Innovative SMEs collaborating (relative to EU & BE)
2. R&D expenditures in the business sector (relative to EU & BE)
3. Sales of innovative products (relative to EU & BE)
4. Innovation expenditures per person (relative to EU)

Areas for improvement

1. R&D expenditures in the public sector (relative to EU & BE)
2. Design and trademark applications (relative to EU & BE)
3. Lifelong learning (relative to EU & BE)

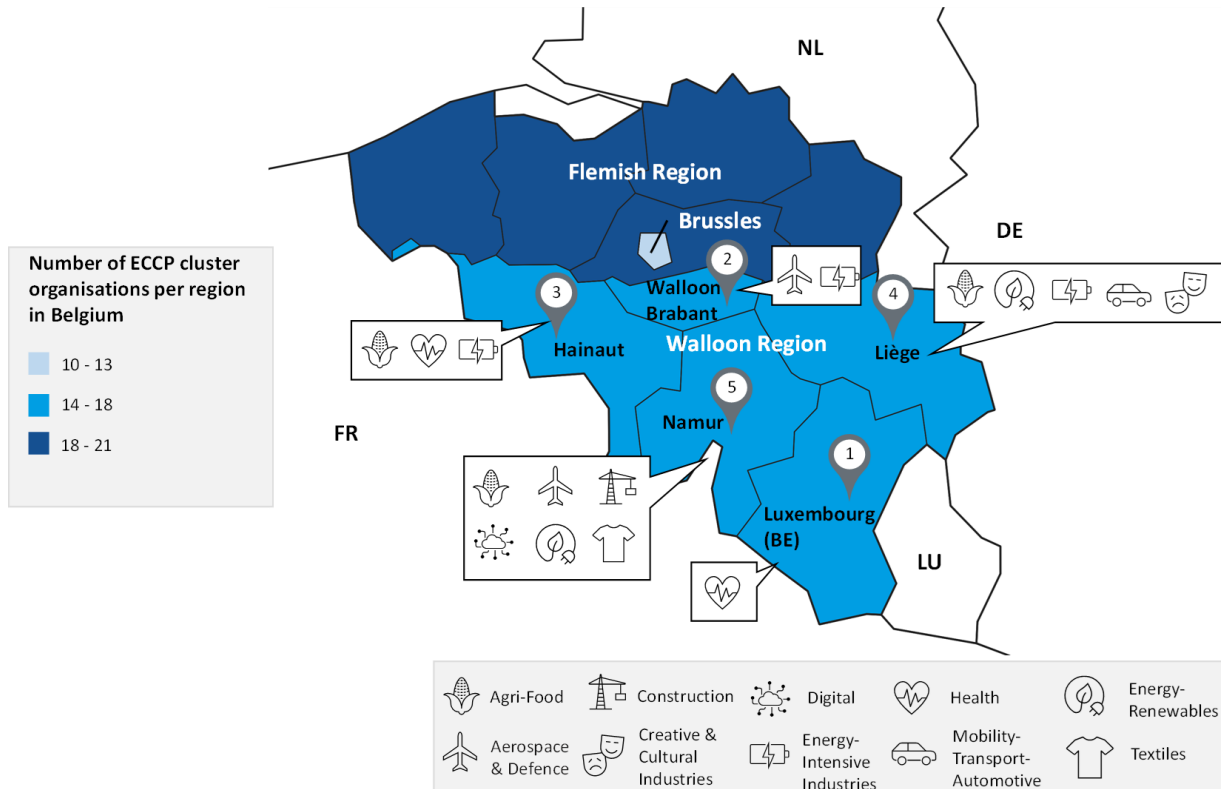
Regional Competitiveness Performance (RCI 2022)

- Walloon provinces all exhibit an above-average overall score, indicating relatively high regional competitiveness
- The provinces of **Liège and Namur** particularly stand out for their relatively high performance across all sub-indexes

Source: European Commission (2023): Regional Innovation Scoreboard 2023 – Regional profiles Belgium.

ECCP cluster ecosystem in Wallonia: Locations, industrial ecosystems and structures

Cluster organisations registered on the ECCP in Wallonia and Belgium



Source: ECCP (2024). Own elaboration based on <https://reporting.clustercollaboration.eu/all>; last access 30.09.2024.

15 Cluster Organisations from Wallonia on the ECCP





- 14 cluster organisations are supported by the region. These include:
 - 6 competitive clusters, aiming to foster research, innovation, and international collaboration
 - 8 business clusters, supporting the economic development and networking of SMEs
- COs spanning **10 out of EU industrial ecosystems**,
- Top ecosystems:** Energy-Renewables ecosystem (5 COs), Construction and Energy-Intensive-Industries (each 4 COs)

Structure of clusters

- Many mid-sized and large COs in terms of member structure: 80% have 100 or more members (EU: 37%)
- Collaborative Areas:** Internationalisation; Partnering for projects; Exchanging in peers; Technology scouting; Resource efficiency & circular economy

Clusters and regional economic competitiveness

Cluster organisations are **positively correlated** with a range of **economic competitiveness indicators**:

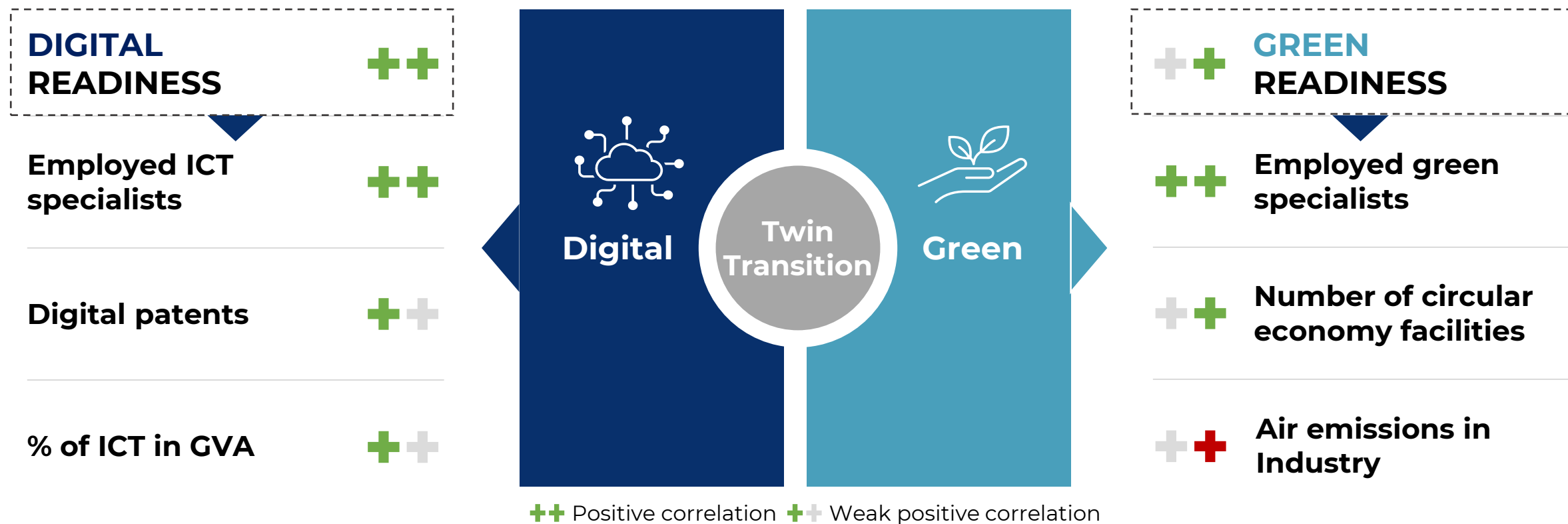
Business environment		Firm behaviour		Innovation potential		Economic returns	
							
Birth of enterprises	++	Business R&D investment	++	PCT patents per capita	++	GDP per capita	++
Human resources in Science & Tech	++					Apparent labour productivity	++
						Employment rate	++
						Employment in tech & knowledge sectors	++

++ Positive correlation ++ Weak positive correlation

Source: ECCP (2024). The symbols in the table indicate Pearson correlation coefficients that are significant at 95% level. Positive/negative Correlations include coefficients ≥ 0.3 , weak correlations include coefficients ≥ 0.1 .

Clusters and the Twin Transition

Clusters are driving digital and green readiness:



Source: ECCP (2024). The symbols in the table indicate Pearson correlation coefficients that are significant at 95% level. Positive/negative Correlations include coefficients ≥ 0.3 , weak correlations include coefficients ≥ 0.1 . Green fields indicate a positive relationship and red a negative relationship

European Commission offers important programmes for collaborative projects among clusters & their members



ESCP-4i

- COSME initiative
- Development and implementation of joint internationalisation strategies to support SME internationalisation
- **Eight clusters from Wallonia involved in 16 ESCP-4i projects**



ESCP-4x

- COSME initiative
- Boost the cross-cluster networking and learning within the EU and development of cluster management excellence
- **Two clusters from Wallonia are involved in two different ESCP-4x projects: CE4BIG and SMARTENERGY**



Euroclusters

- Single Market Programme
- Support the implementation of the EC industrial strategy through cross-sectoral, interdisciplinary and trans-European cluster initiatives
- **Three clusters from Wallonia are participating in four Euroclusters.**



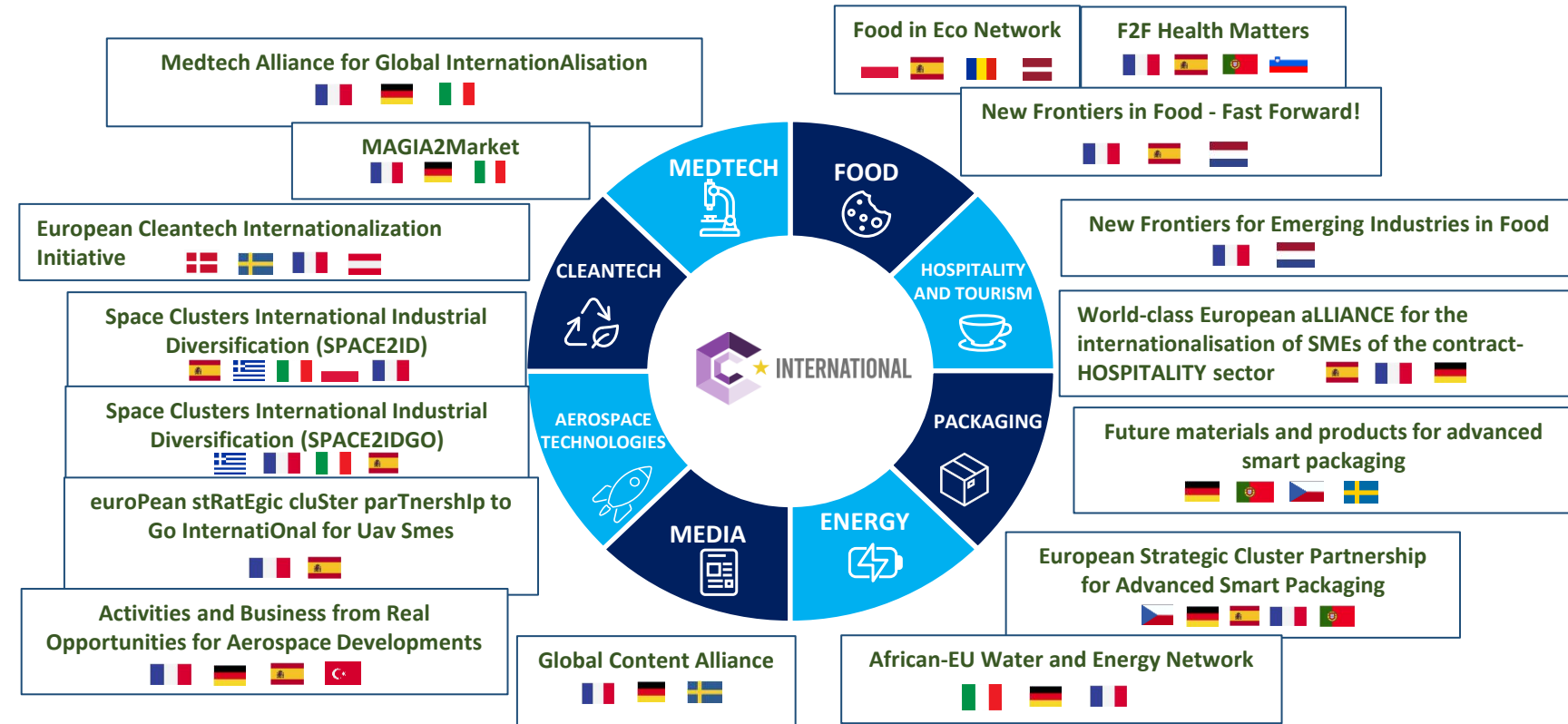
I3

- Funding instrument under the European Regional Development Fund (ERDF) 2021-2027 programming period that provides advisory and financial support
- **Seven beneficiaries from Wallonia, of which one is a cluster, participate in four different I3 projects.**

Source: ECCP (2024).

Eight Clusters Participating in 16 ESCP for Going International (ESCP-4i)

Overview of participation of Walloon cluster organisations in the ESCP-4i



- ESCP-4i projects looked towards **diverse target markets** (USA, China, Chile, amongst others)
- Projects include cluster organisations from **16 different** countries
- **Diverse thematic areas** ranging from aerospace technologies to packaging, and food, amongst others

Source: ECCP (2024) based on information from COSME data hub. Note: flags indicate the origin of the involved project partners.

Three clusters from Wallonia involved in four Euroclusters

Overview of participation of Walloon cluster organisations in the Eurocluster initiative

CREATHRIV-EU

- TWIST
- Cross-regional initiative aimed to promote sustainable growth in Europe's Creative and Cultural Industries by supporting their transition to a greener and more digital economy



B-resilient

- Wagralim
- Strengthen the resilience of food-producing SMEs by optimizing biomass use, promoting zero-waste and circular practices.



GEMSTONE

- Pôle MecaTech
- Fostering Green Manufacturing in five key industrial sectors by enhancing knowledge and skills for industrial equipment providers and promoting innovation.



DREAM

- Pôle MecaTech
- Accelerating digital transformation in manufacturing by integrating digital ecosystems with market sectors



- **4 participations** in Euroclusters by three Walloon cluster organisations.
- Projects involved **25 EU cluster partners** from 11 different countries.
- **Thematic focus areas:**
 - Creative and Cultural Industries
 - Green manufacturing,
 - Agri-Food
 - Digital transformation in manufacturing

Smart Specialisation Strategy of Wallonia and the role of clusters

Priority areas of the Walloon S3 2021-2027



Source: Service public de Wallonie

- The Walloon Smart Specialisation Strategy identifies **5 priority areas**
- The Walloon cluster organisations are key both for the **development & the implementation** of the Walloon S3 2021-2027.
- A **coordination cell** for each of the priority areas oversees the development of the respective area. These coordination cells include the regional administration and the relevant cluster organisations
- Walloon cluster organisations are involved in the development & implementation of **Strategic Innovation Initiatives**

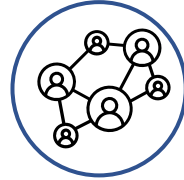
Final Remarks



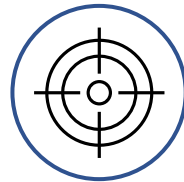
Wallonia's innovation ecosystem is characterised by strong collaboration among innovation actors, business R&D investments, and a focus on fostering innovation-driven growth and commercialisation



The **Walloon cluster landscape** is defined by 14 competitive and business clusters, with particular strengths found in the industrial ecosystems Energy-Renewables, Energy-Intensive-Industries and Construction

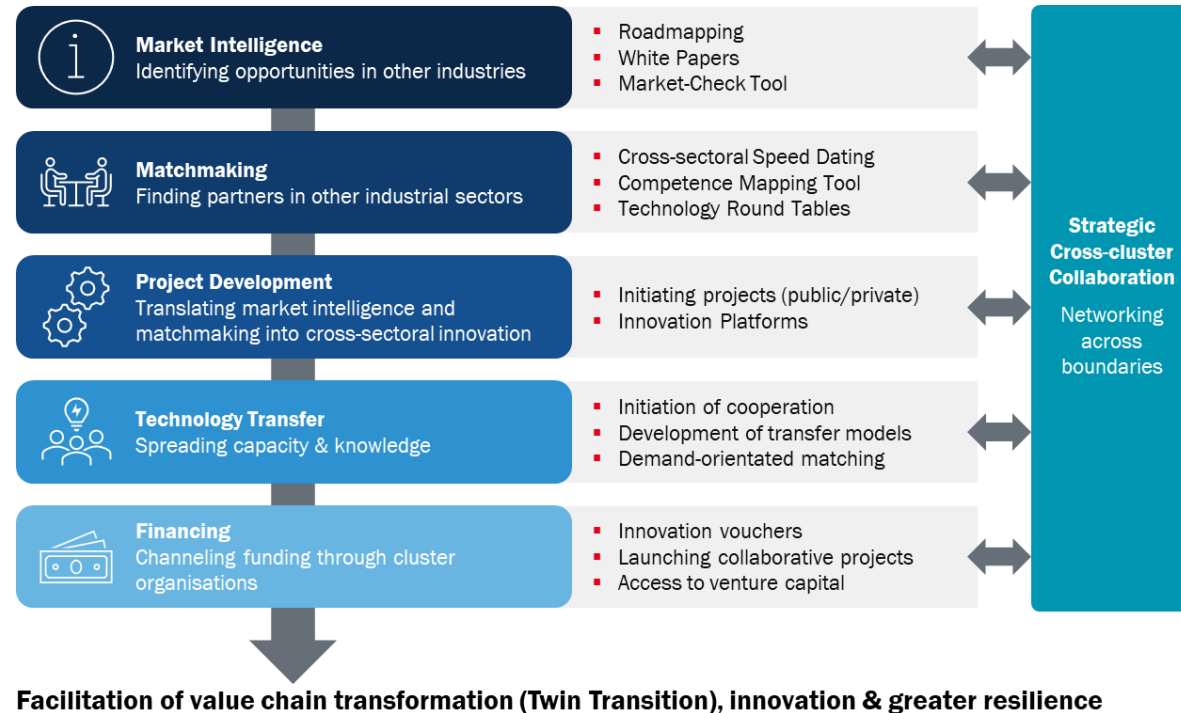


Several clusters participate in various **inter-regional collaboration initiatives** to facilitate innovation & value chain transformation



The Walloon S3 2021-2027 identifies **5 priority areas**. Walloon clusters play a key role in the development & implementation of the strategy

Role of cluster organisations in the innovation ecosystem



Source: ECCP (2024), based on European Cluster Observatory (2014): Cluster Collaboration and Business Support Tools to Facilitate Entrepreneurship, Cross-sectoral Collaboration and Growth

Make sure to check out the Input Paper!





EUROPEAN CLUSTER
COLLABORATION PLATFORM

Clusters meet Regions’ event in Charleroi
“Driving The Regional Economic Revival in Europe:
AGORADA+ discusses innovation ecosystems in life
sciences, cleantech & advanced manufacturing for
regional development”

Input paper

An initiative of the European Union



