

Directorate General for Internal
Market, Industry,
Entrepreneurship and SMEs

New developments in EU Cluster Policy

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26 September 2018, Taftie Expert Session

**Unit GROW.F2 – Clusters, Social
Economy & Entrepreneurship**

Why clusters?

... offer a favourable eco-system for innovation

... host innovative companies

... well positioned as facilitators & bridge-builders to find strategic partners

... create strategic partnerships also at the level of policy-makers and intermediaries

... Provide support to SMEs for innovation and internationalisation activities

... facilitate the validation of SMEs ideas for joint innovation projects



**"INNOVATION SHOULD
BREAK SOME OUT-
DATED RULE, BUT
NEEDS A LEVEL OF
GUIDANCE"**

Pearl Zhu

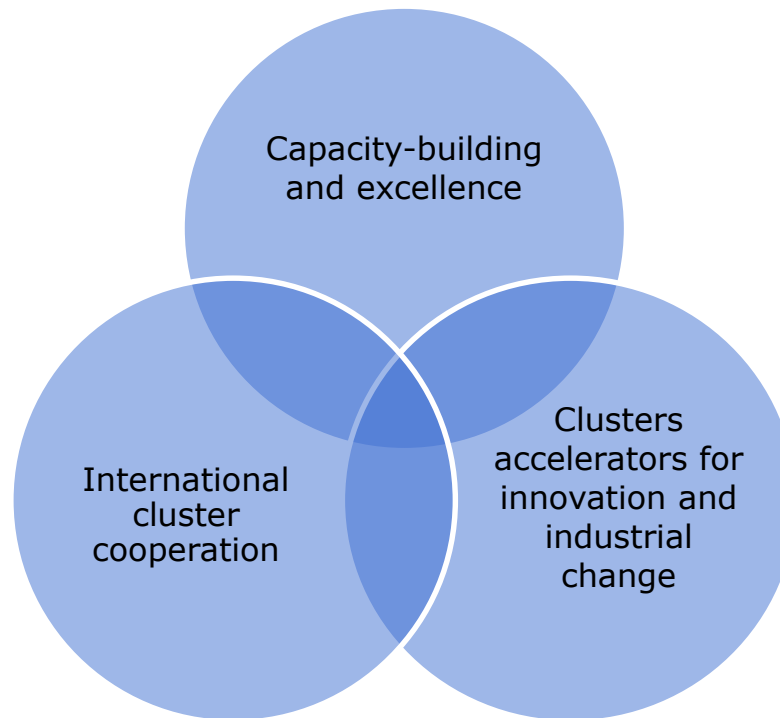
startus
INSTITUT

Cluster firms ...

- are **more innovative** than non-cluster firms
- register **more trademarks** and apply for **more patents**
- cooperate and **export more**

About 38% of European jobs are based in 2000 clusters.

Focus of European cluster policy



European Cluster Excellence Programme so far

Supporting capacity building in cluster management to raise innovation capacity and competitiveness of clusters

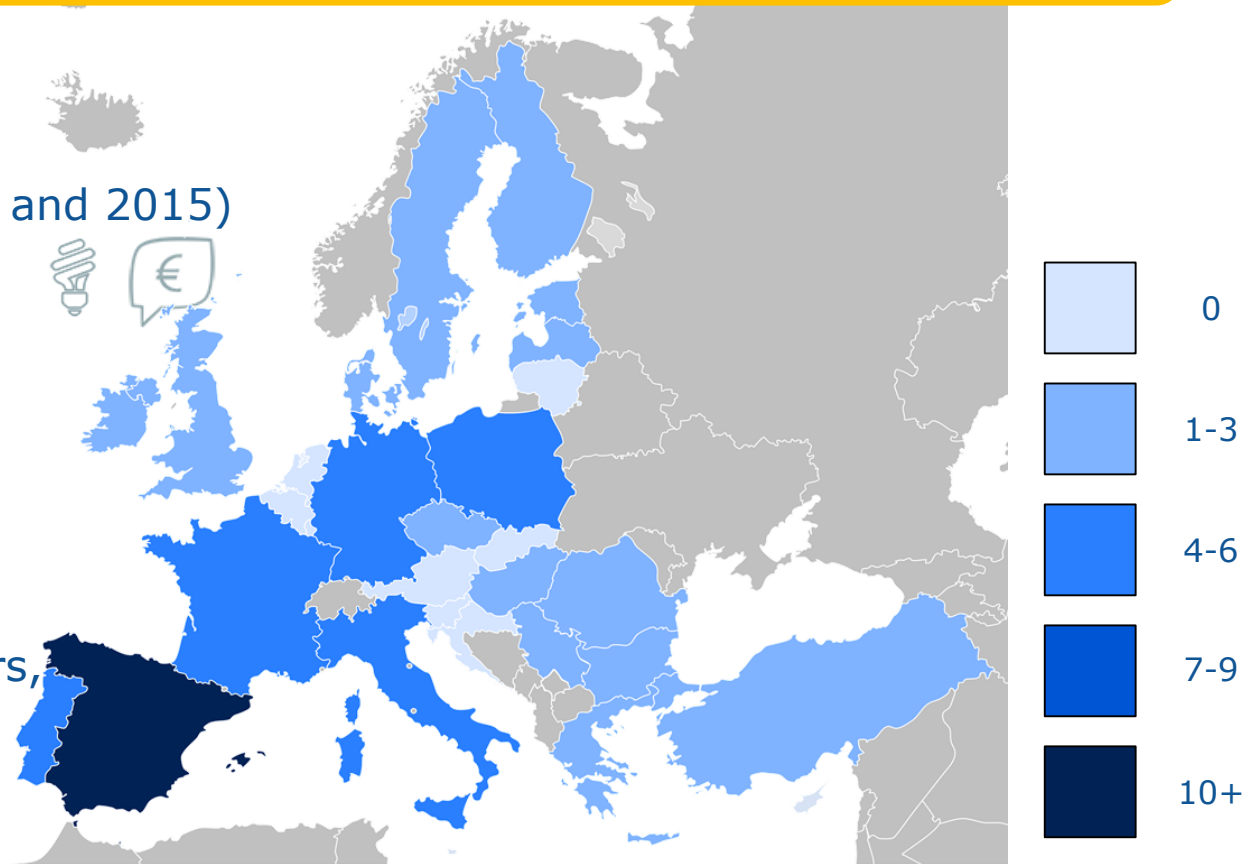
- 2 calls for proposals (2014 and 2015)
- **11 projects** (2.47 million)



57 cluster organisations
representing 11,000 SMEs



- Supporting benchmarking, training of cluster managers, mentoring, cross-cluster learning and strategy development.



European Cluster Excellence Programme 2018

Strengthen cluster management excellence and strategic interregional partnering to foster cluster capacity building and SME competitiveness

Budget: 3,6 M€ - 10-12 partnerships – Publication : Q4 2018

Expected tasks:

- 1. Enhance cluster managers' skills** towards added-value SME support services
- 2. Support cluster strategy development** individually and for interregional European cluster partnership
- 3. Organise twinning, collaboration, networking and learning activities and cooperation projects** for cluster organisations, technology centres and SMEs (towards boosting internationalisation, technology transfer & uptake of innovation, creativity and resource-efficient solutions)
- 4. Implement "Erasmus" for Clusters pilot mobility scheme** (promotion, recruitment, matching and follow-up of short-term visits with lump sum payments) facilitated by support office of European Cluster Collaboration Platform

Cluster Internationalisation Programme for SMEs (COSME, €19M)

Supporting SME access to global value chains through clusters

European Cluster Collaboration Platform

- The hub connecting clusters across Europe and beyond.
- Over **850 cluster organisations profiled** !!!



International cluster matchmaking events in third countries and Europe

- 6 Events in 2016 with: US, Taiwan, Iran, Mexico, Brazil & EU Cluster conference
- 5 events in 2017: US, Taiwan, Paris Air Show, Thailand, Greece
- 5 events in 2018: EU Industry Day, Ukraine, Taiwan, Western Balkans, Austria Utility Week

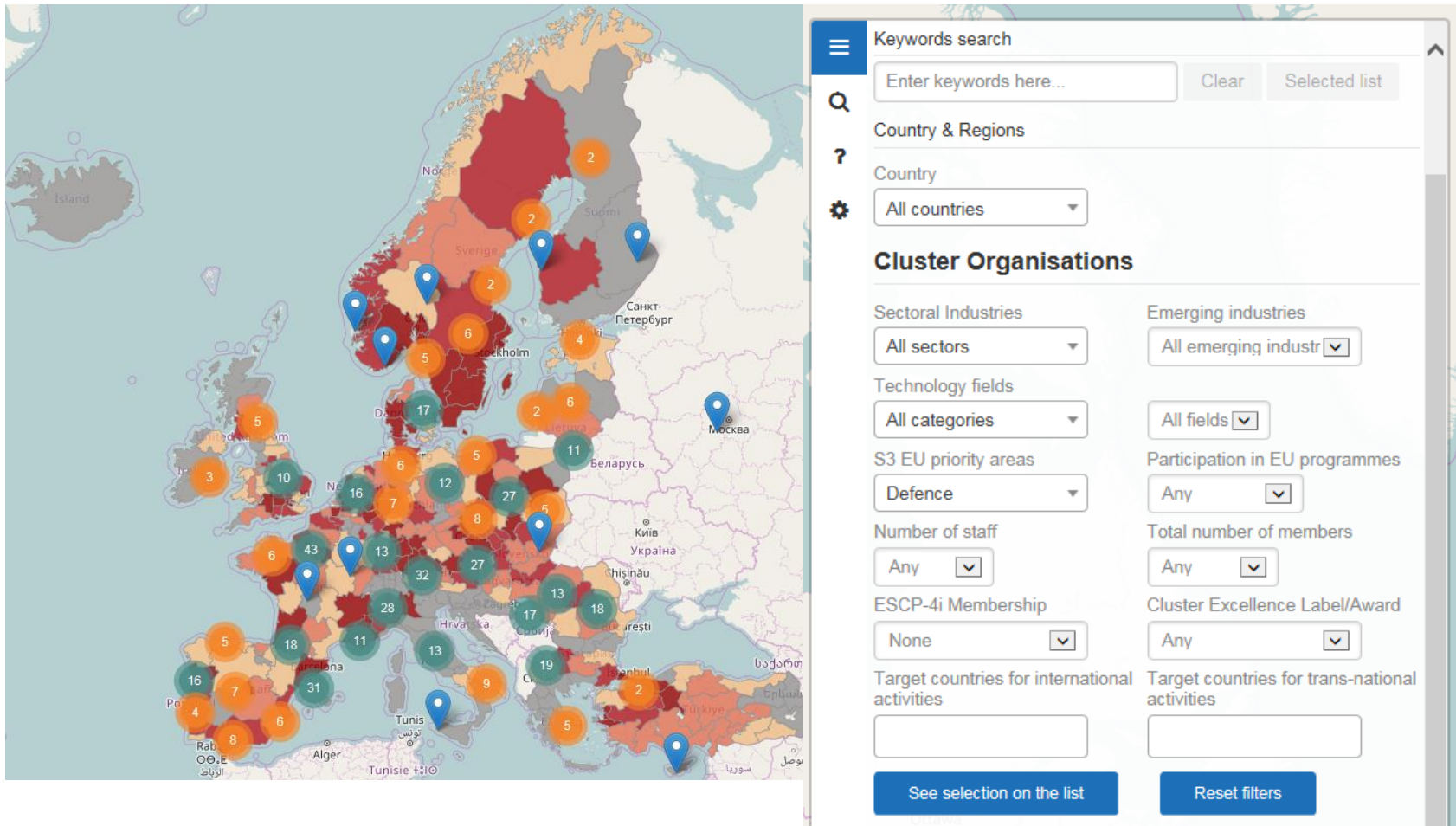
European Strategic Cluster Partnerships – Going International (ESCP-4i)

- "**Clusters Go International**" action promoting SME internationalisation towards 3rd countries
- EU Cluster partnerships implementing joint strategies to go international
 - 15 Cluster Partnerships (2016-2017)
 - 23 + 2 Cluster Partnerships (2018-2019)



The European Cluster Collaboration Platform -ECCP

The Platform Connecting over 850 Cluster Organisations





European
Commission

The European Cluster Collaboration Platform

A Vibrant Platform for Cluster Organisations

CLUSTER ORGANISATIONS MAPPING

The easiest way to find a cluster organisation
in Europe

The innovative mapping offers:

- hundreds of cluster organisation profiles
- a large selection of filters (industry sectors, countries ...)
- a smart correlation with the indicators of the European Cluster Observatory

INTERNATIONAL COOPERATION

Cooperation with strategic countries
beyond Europe

Key information sources helping clusters and
SMEs internationalise:

- information on priority third countries
- "gateways" to EU international support services

PARTNER SEARCH

A forum for cluster organisations to discuss offer/
demand/exchange opportunities for collaboration

A virtual, quick and efficient dedicated
"marketplace" to:

- find and be found
- trigger direct dialogue with other clusters
- interact with peers in a structured way

MATCHMAKING EVENTS

Opportunities to connect and initiate
collaboration in high level events in Europe
and beyond

Cluster matchmaking meetings (C2C, C2B)
stimulating cooperation for clusters and SMEs
through:

- interactive and innovative formats
- professional support
- dedicated financial support to participate in events

EU CLUSTER PARTNERSHIPS

Implementing joint strategies
to go international and specialise









ECCP is the HOME of the newly established
European Strategic Cluster Partnerships
(ESCPs) offering:

- profile and visibility for ESCPs
- a reserved forum for exchange and collaboration
- an opportunity to showcase partnership activities and success stories



ECCP Audience by location

The following figure shows that almost 24% of visitors are coming from Spain (followed by France and Belgium, with 17,3% of shares for both countries). This trend (Spain first) has been constant over the months.

Country	Sessions	Sessions
	224,381 % of Total: 100.00% (224,381)	224,381 % of Total: 100.00% (224,381)
1.  Spain	23,935	10.67%
2.  France	17,374	7.74%
3.  Belgium	17,362	7.74%
4.  Italy	15,952	7.11%
5.  Germany	12,717	5.67%
6.  Romania	9,625	4.29%
7.  China	9,482	4.23%
8.  United Kingdom	7,435	3.31%
9.  India	7,244	3.23%
10.  United States	7,102	3.17%

International Cluster Match-making Events (2)



2018

- **European Cluster Matchmaking Event, Brussels, 22 Feb 2018**
140 clusters participating in the context of the **EU Industry Day**, 22-23 Feb. 2018 –
- **EU-Ukraine Cluster Policy Learning and Matchmaking Event, Kiev, 27-28 March 2018**
50 clusters from Ukraine and the EU in the context of the EU-Ukraine High level Industrial Dialogue
- **EU-Taiwan Cluster Cooperation and Matchmaking Event, ICT Computex, Taipei, 4-6 June 2018**
32 clusters from EU & Taiwan in the context of European Innovation Week and the EU-Taiwan Industrial Dialogue



International Cluster Match-making Events (2)

2018



- **EU-Korea Cluster Matchmaking Event**, European Utility Week, Vienna, **6-8 November 2018**
 - Energy
 - Cleantech
 - Smart city
 - Transport (electric mobility)
 - Enabling technologies used to develop innovations in clean energy products, services and solutions, such as lightweighting, composites, additive manufacturing, nanotechnology, ICT



<https://www.clustercollaboration.eu/event-calendar/eu-korea-cluster-matchmaking-event>

- **EU-Western Balkan countries Policy Learning & Matchmaking Event**, Zagreb, **22-23 Nov. 2018**

Agro / Food, IT, Manufacturing / Automotive, Tourism / Maritime, Textile / apparel / footwear, Pharma / chemicals, Energy



<https://www.clustercollaboration.eu/event-calendar/eu-western-balkans-cluster-policy-learning-and-matchmaking-event>

International Cluster Match-making Events (5)

10 Matchmaking events (2016-2017)

- **2180 bilateral meetings**
- 300 participants from Europe
- 140 participants from countries beyond Europe
- **416 cluster cooperation agreements/partnerships initiated or already established**
- 28 European countries were represented
- 6 non-European countries represented (including the USA, Taiwan, Brazil, Mexico, Iran and Thailand)

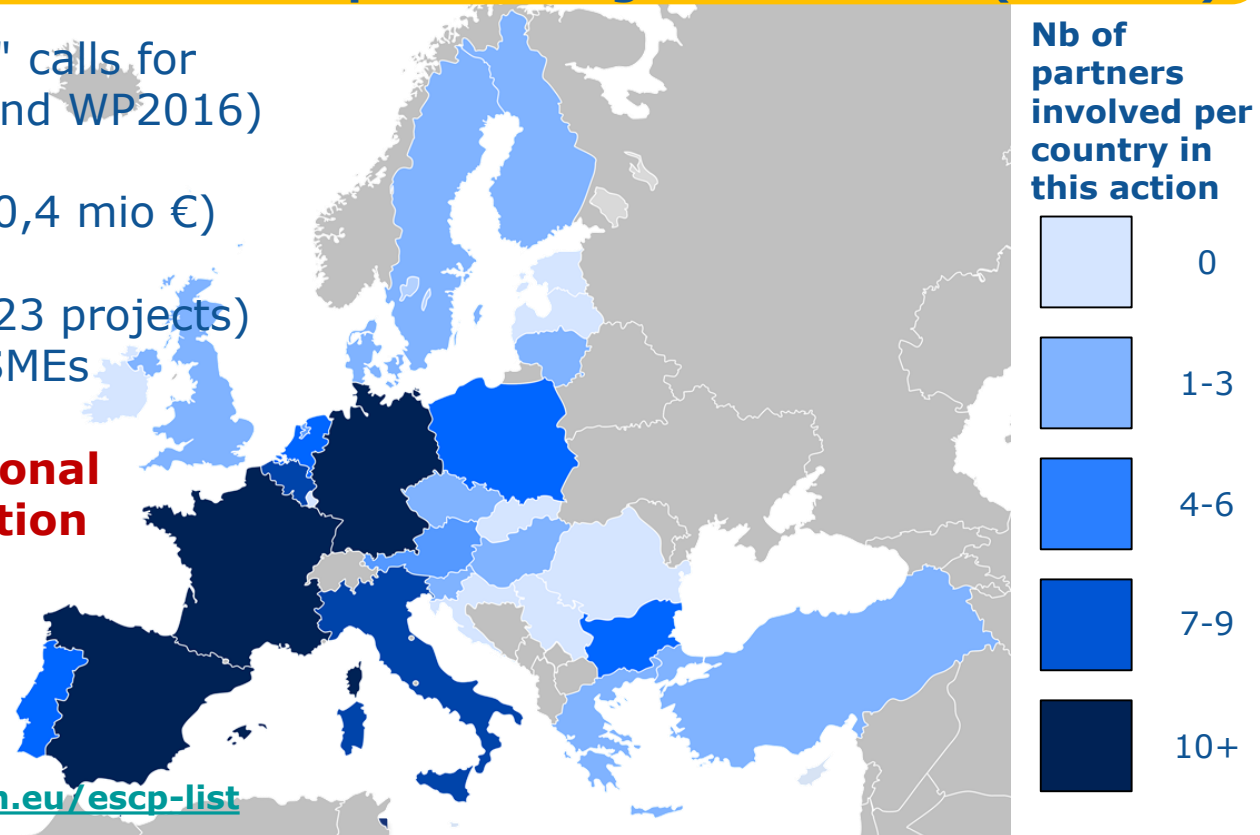


Promoting cluster cooperation for industrial leadership in global markets through

Promoting cluster cooperation for industrial leadership in global markets through

- Cluster Go International" calls for
sales (WP2014/2015 and WP2016)
- New projects (6,84+0,4 mio €)
- Cluster organisations (23 projects)
representing over 17,000 SMEs

- Starting **joint international**
regies and collaboration
partners in third
ries for the benefit
Es



EU 'Clusters Go International' Partnerships (2018-2019) Overview



Overall, the 23 new ESCP-4i Partnerships involve

123 European cluster organisations

25 COSME participating countries, incl. 21 EU countries, 3 Western Balkans countries (RS, AL, MK) and Turkey

17,227 SMEs

Each Partnership include on average

5 partners

749 SMEs

EU 'Clusters Go International' Partnerships (2018-2019) Overview

Sectoral and Industrial Focus



DISCp
GCA
PIMAP

ICT, IoT & Micro-
electronics

Textile

EU-TEXTILE2030

Smart City,
Mobility and
Transport

ESCT GO GLOBAL
MOBIGOIN-ACTION
GIVE
PERES

SPACE2IDGO
IDEEO
SPACEWAVE

Space
applications

Energy and
environment
COSMENERG-4i

EC2i
ELBE
GEO-ENERGY EUROPE

ADPACK²

NF4

FOODNET

FOODPACKLAB

Agro-food and
packaging

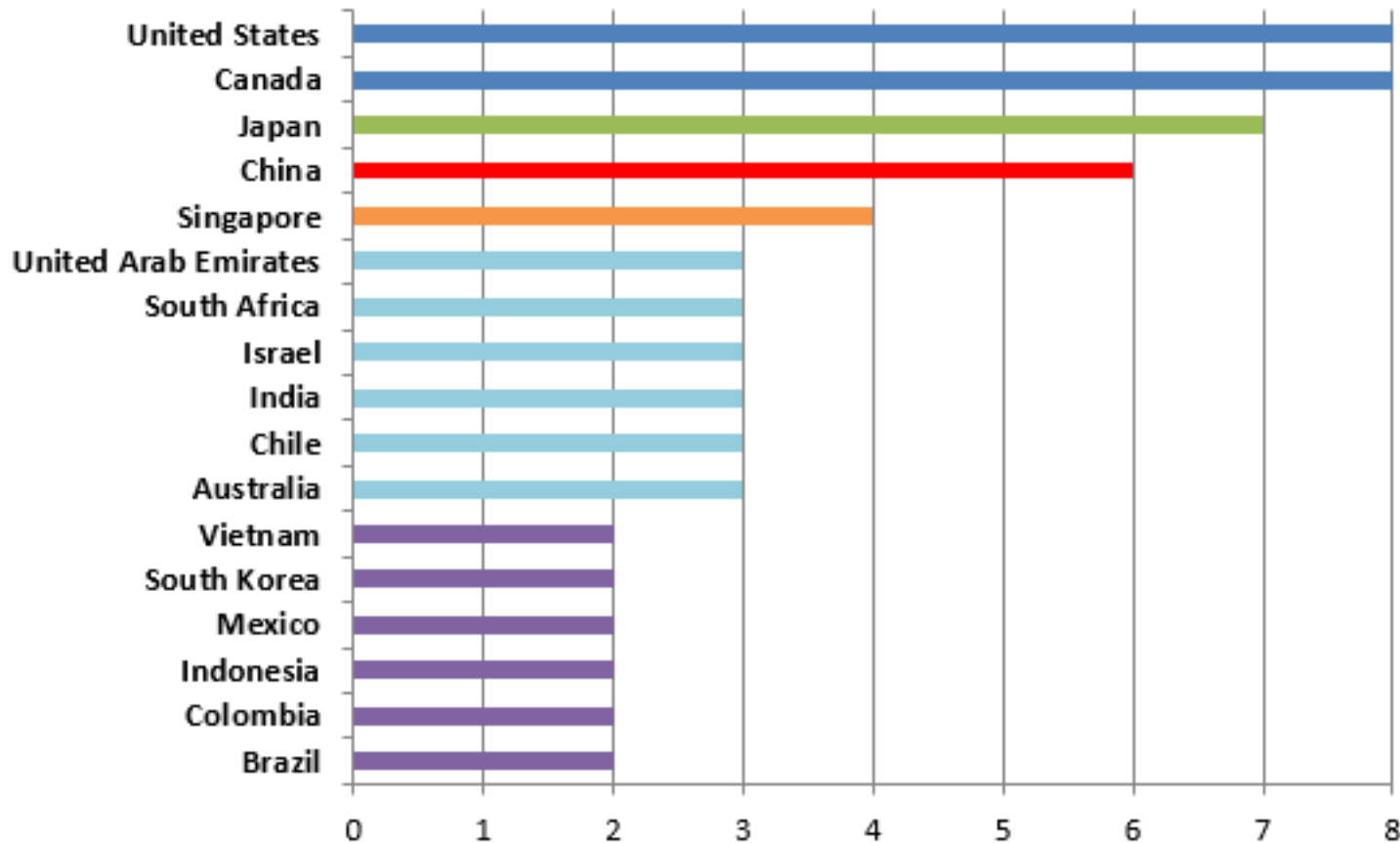
Construction
SENTINEL

Health, Cosmetics
and Biotech

LASER-GO GLOBAL
COSMETICS4WELLBEING
MAGIA

EU 'Clusters Go International' Partnerships (2018-2019) Overview

Main Target Countries



Other target countries by 1 Partnership:

Bolivia,
Costa Rica
Ecuador
Jordan
Kenya
Malaysia
Morocco
New Zealand
Peru
Philippines
Qatar
Taiwan
Thailand

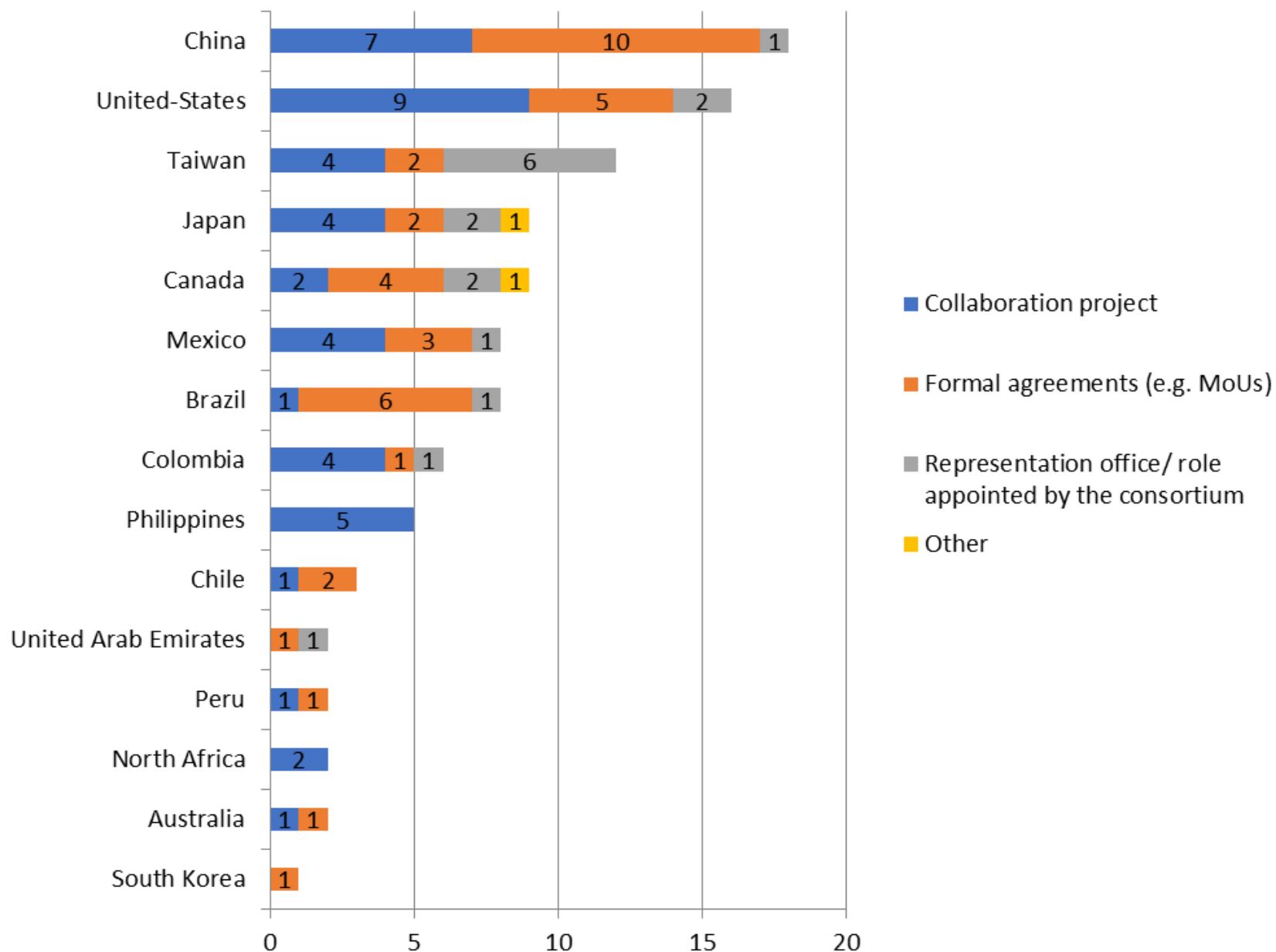
European Strategic Cluster Partnerships – Going International (ESCP-4i)

– results from First generation (2016-2017)



- **15 co-funded European Strategic Cluster Partnerships** involving about **100 cluster organisations across 23 European countries** have developed and implemented **joint strategies to support SME internationalisation** towards third countries **(2016-2017)**
- **2000 SMEs** have been **involved in activities targeting international third-markets generating 85 concrete business cooperation cases with international partners**
- **370 Cluster-to-Cluster events**
- **3010 Business-to-Business events** have been conducted
- **39 Memoranda of Understanding (MoU) and 45 collaboration projects** implemented between EU clusters and international peer organisations

Cluster cooperation cases (phase 1 and phase 2)



Using clusters to facilitate value chain innovation and industrial transformation

Promoting collaboration and innovation across regional and sectoral silos & accelerating industrial change and smart specialisation synergies

- European Strategic Cluster Partnerships for smart specialisation investments (COSME 2017, €2.8 mio proposed)
- European Observatory for Clusters and Industrial Change (COSME 2016, €2.8 million)
- Cluster facilitated projects for new industrial value chains (Horizon2020, ca. €130 million)



EU Cluster Partnering - for smart specialisation investment

COSME 2017 – Call on European Strategic Cluster Partnerships for smart specialisation investments (ESCP-S3)

This call is

- linked to the establishment of the Smart Specialisation Platform on Industrial Modernisation and Investment
- envisaged to strengthen industry participation and inter-regional collaboration in the implementation of smart specialisation strategies.



Open Call (2,8 M€): 8 + 1 projects expected to be funded (350.000 €/projects) – starting in October 2018

European Observatory for Clusters and Industrial Change

12 pilot regions in industrial transition supported to develop modern cluster policy

*Regions chosen for being in middle of **industrial modernisation** process*

*Regions to receive **advisory support services for modern cluster policy** from the European Observatory for Clusters and Industrial Change*

(incl. survey, scoreboard benchmarking report, policy review meeting, regional assessment report and policy briefing)



Source:

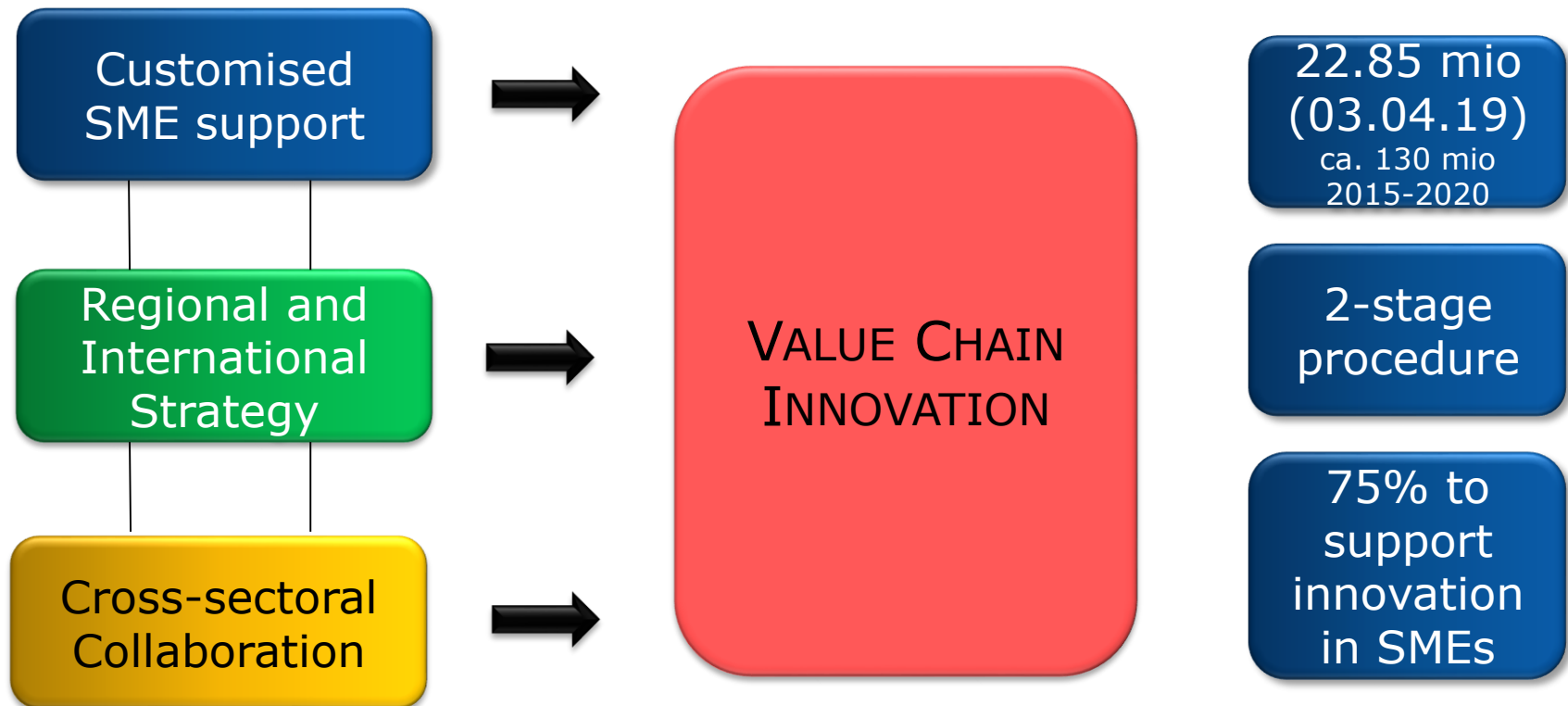
http://ec.europa.eu/regional_policy/sources/docgener/informat/industrial_transition/pilot_industrial_transition.pdf

Innosup-1 cluster facilitated projects for new value chains



- Support for innovation action
- H2020 countries
- Any legal entity (cluster organisation, SME, research/technology/education centre, public authority, chamber of commerce, university, etc.)
- Using clusters to facilitate value chain innovation & industrial transformation through cross-sectoral innovation & cross-regional collaboration
- EUR 130 mln 2014-2020; Max €5 mln per project
- 75 % budget towards SMEs
- Next call: April 2018

Using cluster organisations to facilitate value chain innovation & industrial transformation



Cluster facilitated project for new industrial value chains under Horizon 2020 (INNOSUP1)

INNOSUP-1 Cluster facilitated projects for new industrial value chains	No. of projects	overview	Proposals received	budget
H2020-WP2015-INNOSUP-1	6	5 projects started in September 2016 and 1 started in February 2017	119	€26.7 million
H2020-WP2016-INNOSUP-1	3	2 projects started in March 2017 and one in September 2017	97	€15 million
H2020-WP2017-INNOSUP-1	4	all projects started in April 2018	73	€18.5 million
H2020-WP2018-INNOSUP-1	Circa 5	2 nd stage call deadline on 13 September 2018 projects to start around spring 2019	66	€19.97 million
H2020-WP2019-INNOSUP-1	Circa 4-5	Calls opens on 6 November 2018 1 st stage call deadline on 3 April 2019, 2 nd stage call deadline on 12 September 2019 projects to start around spring 2020		€22.85 million
H2020-WP2020-INNOSUP-1	Circa 5-6	Calls opens November 2019 1 st stage call deadline April 2020, 2 nd stage call deadline September 2020 projects to start around spring 2021		€26 million



Administrative Arrangements to promote Cluster cooperation (1)

Administrative Arrangements on Clusters are signed by DG GROW to promote policy exchanges and cluster cooperation with national authorities from third countries

Objective: to facilitate linkages between clusters in mutual economic interest and help SMEs find strategic partners

USA (US Department of Commerce, April 2015)

- **EU-US Workshop on best practices in cluster mapping and cluster-based economic policies** in Boston (at Harvard Business School) and Washington, D.C. in November 2015
- **EU-US Cluster Matchmaking Event at Hannover Messe, Germany, April 2016**
 - Over 70 EU and US clusters - 140 meetings between EU-US organisations
- **High level EU Cluster Mission to the USA, TechConnect World Innovation Conference, Washington D.C., 16-17 May 2017** with visits in Philadelphia and Boston area – 120 c2c meetings

Korea (Ministry of Trade, Industry and Energy & KICOX, May 2018)

- **1st EU-Korea Cluster Matchmaking Event, European Utility Week, Vienna, 6-8 November 2018 (tbc)**
- **Korea-EU Cluster Matchmaking Event in 2019, Korea (tbd)**



Administrative Arrangements to promote Cluster cooperation (2)

Taiwan (Taipei Representative Office in the EU, June 2018)

- **3 EU-Taiwan Cluster Matchmaking Events in 2016 and 2018 (Taipei), 2017 (Brussels)**
- **Possible next event with Taiwan in Europe in 2019 (tbc)**

On-going discussions with Canada, Japan, Pacific Alliance countries

Further consideration for **reinforcing exchanges** with **Ukraine, Western Balkans, South Mediterranean countries**

European Cluster Policy Forum



Dialogue among EU Member States, European Commission & experts about modern cluster policies

Synergies between cluster initiatives and industrial, innovation and regional policies, especially in relation to smart specialisation, SMEs scaling-up and cross-sectoral collaboration

Using clusters in supporting entrepreneurship and the scaling-up of SMEs

Cluster internationalisation – using cluster partnerships to help clusters and their members go international

State-aid on clusters

Cluster excellence capacity-building & professionalisation of cluster management (incl. Erasmus for cluster managers)

Outlook for European Cluster Policy

European Cluster Policy Forum at EU Industry Day supported by European Observatory for Clusters and Industrial Change

High-Level Expert Group on Clusters to be set-up in 2019

Next step for EU cluster partnering (25/10/2018) (9 ESCP-S3, 25 ESCP-4i and 13 INNOSUP-1 cluster projects)

European Cluster Week - by end of 2018 / 2019

European Cluster Conference, Bucarest, May 2019

Moving towards Joint Cluster Initiatives (value chains, innovation, internationalisation, skills, entrepreneurship)

Council conclusions on EU industrial policy strategy

"call for the further development of the European cluster policy, with the aim of linking-up and scaling-up regional clusters into cross-European world-class clusters, based on smart specialisation principles, in order to support the emergence of new value chains across Europe."

12 March 2018

Towards Joint Cluster Initiatives in the Single Market Programme (2021-2027) (Commission proposal for Regulation) June 2018

- *Industry-focused SME intermediaries*
- *Thematically targeted, with cross-regional and cross-sectoral outreach to SMEs*
- Channelling scale-up support to groups of SMEs to boost industrial transformation

Building EU value
chains, industrial
modernisation
& capacity building

Partnership activities of

- Cluster organisations
- Specialised technology centres
- Specialised incubators and accelerators

Skills upgrading,
talent attraction &
entrepreneurship
acceleration

Partnership activities of

- Cluster organisations
- Specialised Technology centres
- Specialised incubators and accelerators
- Vocational institutions

Boosting
internationalisation
& access to
global value chains

Partnership activities of

- Cluster organisations



More information

EU Cluster Portal:

<http://ec.europa.eu/growth/smes/cluster/>

European Strategic Cluster Partnerships

<http://www.clustercollaboration.eu/eu-cluster-partnerships>

European Cluster Collaboration Platform (ECCP)

<http://www.clustercollaboration.eu/>

@Clusters_EU

COSME calls

<https://ec.europa.eu/easme/en/cosme>

Cluster facilitated projects for new industrial value chains - Innovation action (INNOSUP-1)

<https://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/6084-innosup-01-2016-2017.html>

Thank you for your attention