



Internal Market, Industry, Entrepreneurship and SMEs

European Cluster Policy Towards Joint Cluster Initiatives

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EUROPEAN INDUSTRY AT A GLANCE



The **EU is a world leader** in many industrial sectors, such as pharmaceuticals, chemicals, mechanical engineering and fashion industries.



32 million people have a job in European industry.



Industry is recovering from the financial and economic crisis. **Over 1.5 million new jobs** have been created in industry since 2013.



About **17% of total value added** in the EU comes from manufacturing. **1 job** in manufacturing **creates up to 2.5 other jobs across the value-chain.**



Industry accounts for **68% of the EU's exports.**

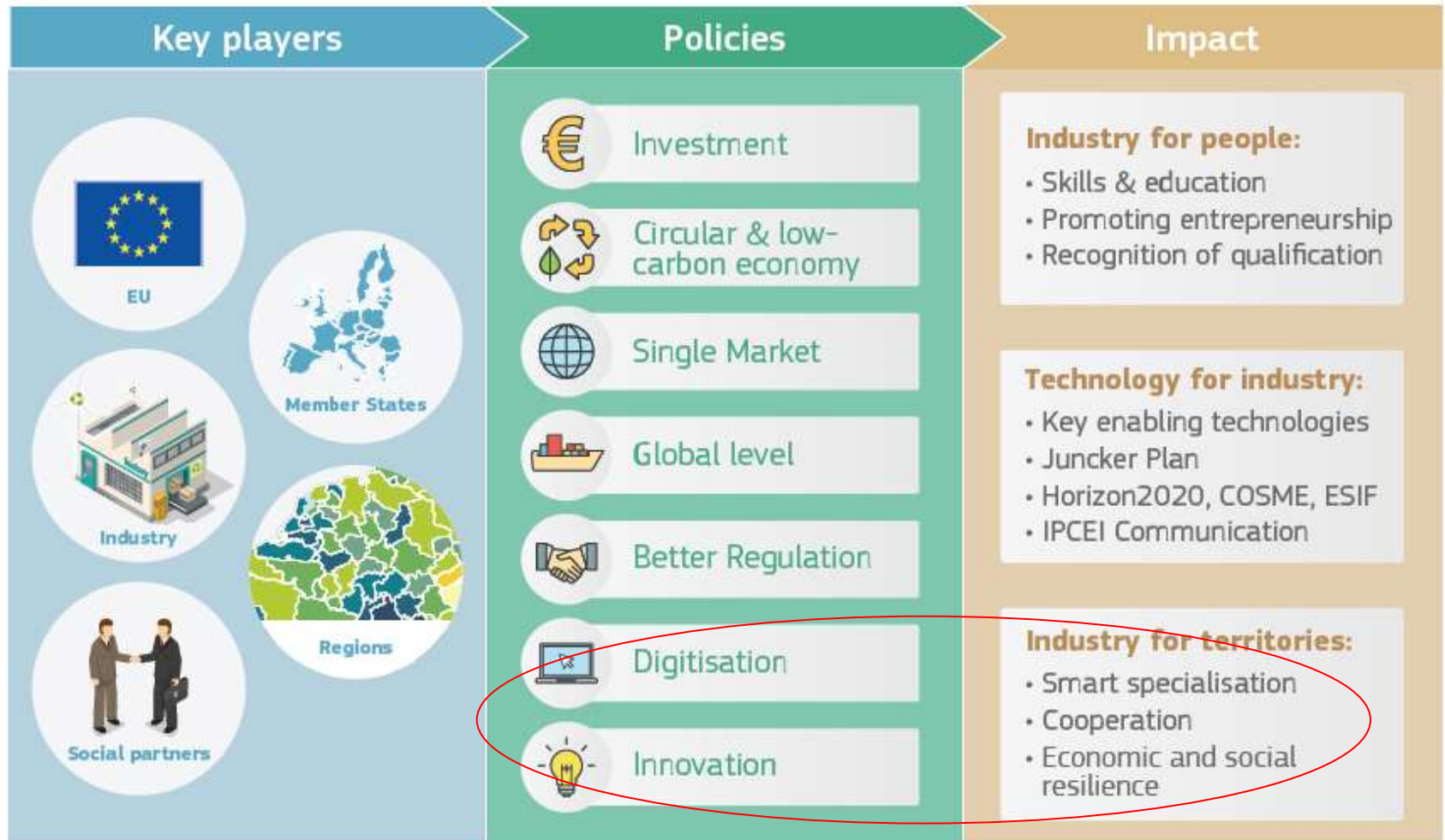


Industry is **undergoing a deep transformation**: new technologies, need for greater resource efficiency, new business models, greater consumer demand for manufacturing activities being bundled with services.



Since the financial crisis, the drop in investment is now reversing, but we still face a **shortage of ICT skills** and a growing **innovation gap** with South Korea and Japan.

INDUSTRY ECOSYSTEM



Investing in innovation ecosystems, cluster policy, review of KETs

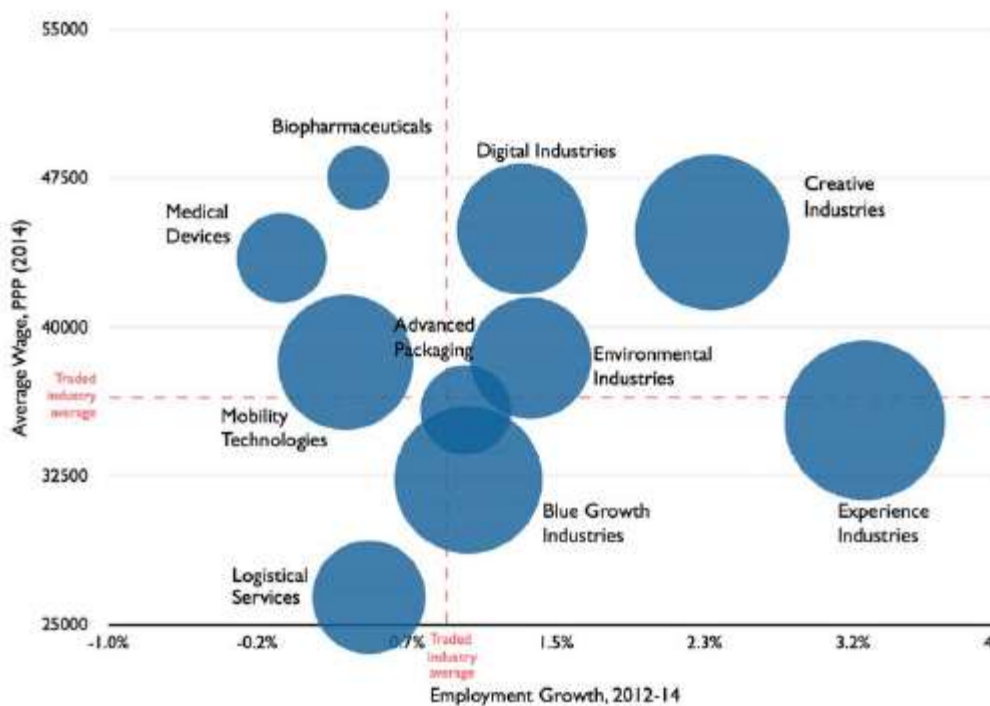


Supporting industrial
innovation **on the ground**

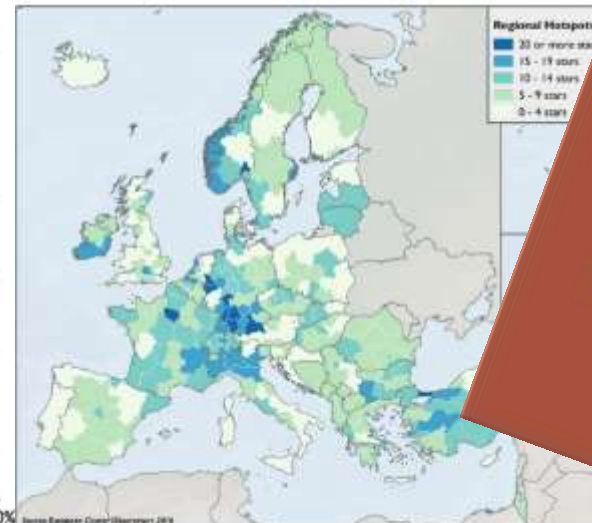
Clusters matter in Europe



- 3043 **strong clusters** account for more than 54 million jobs
- **Gazelles** in strong clusters employ 35 staff compared to 24 elsewhere
- **Wages** in strong clusters are 3% higher than elsewhere
- 40% of activity in **emerging industries** concentrated in 20% of regions



European Cluster
Panorama 2016





*Investing in a smart,
innovative &
sustainable Industry:*

*A renewed EU
Industrial Policy
Strategy*



*Strengthening
Innovation in
Europe's Regions:*

*Strategies for
resilient, inclusive &
sustainable growth*

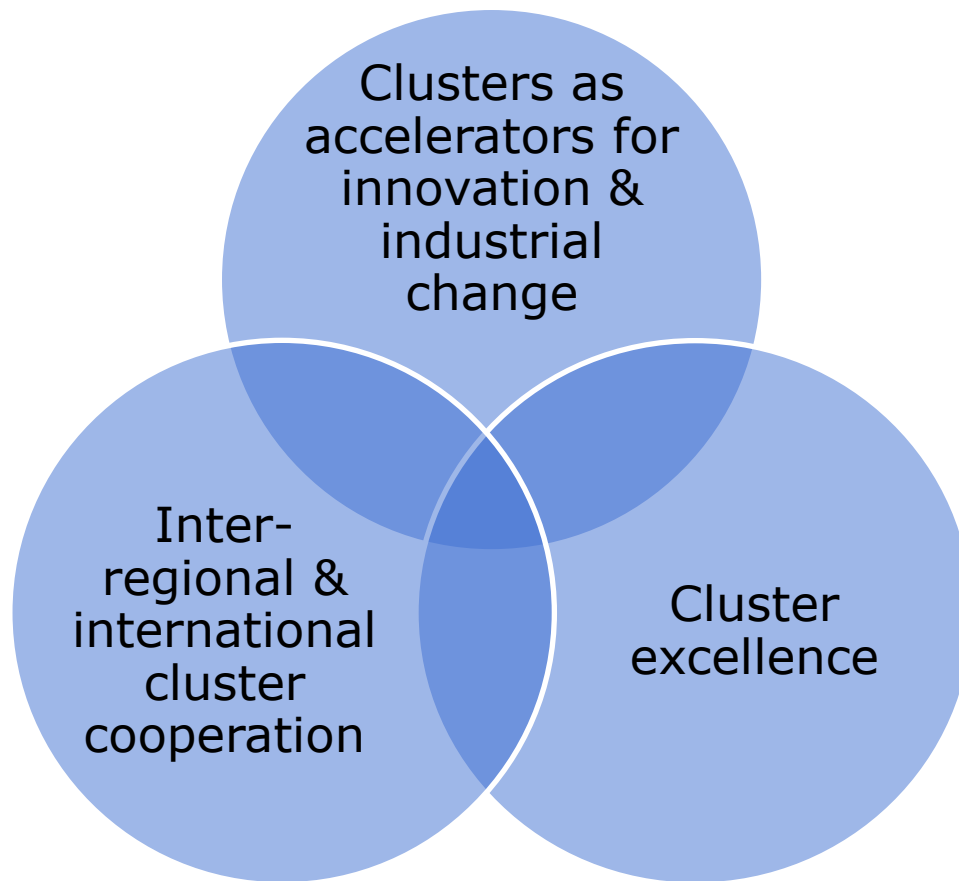


*Europe's next
leaders:*

*The Start-up & Scale-
up Initiative*

EU Policy Framework for Clusters

European cluster strategy for growth



EU Cluster initiatives

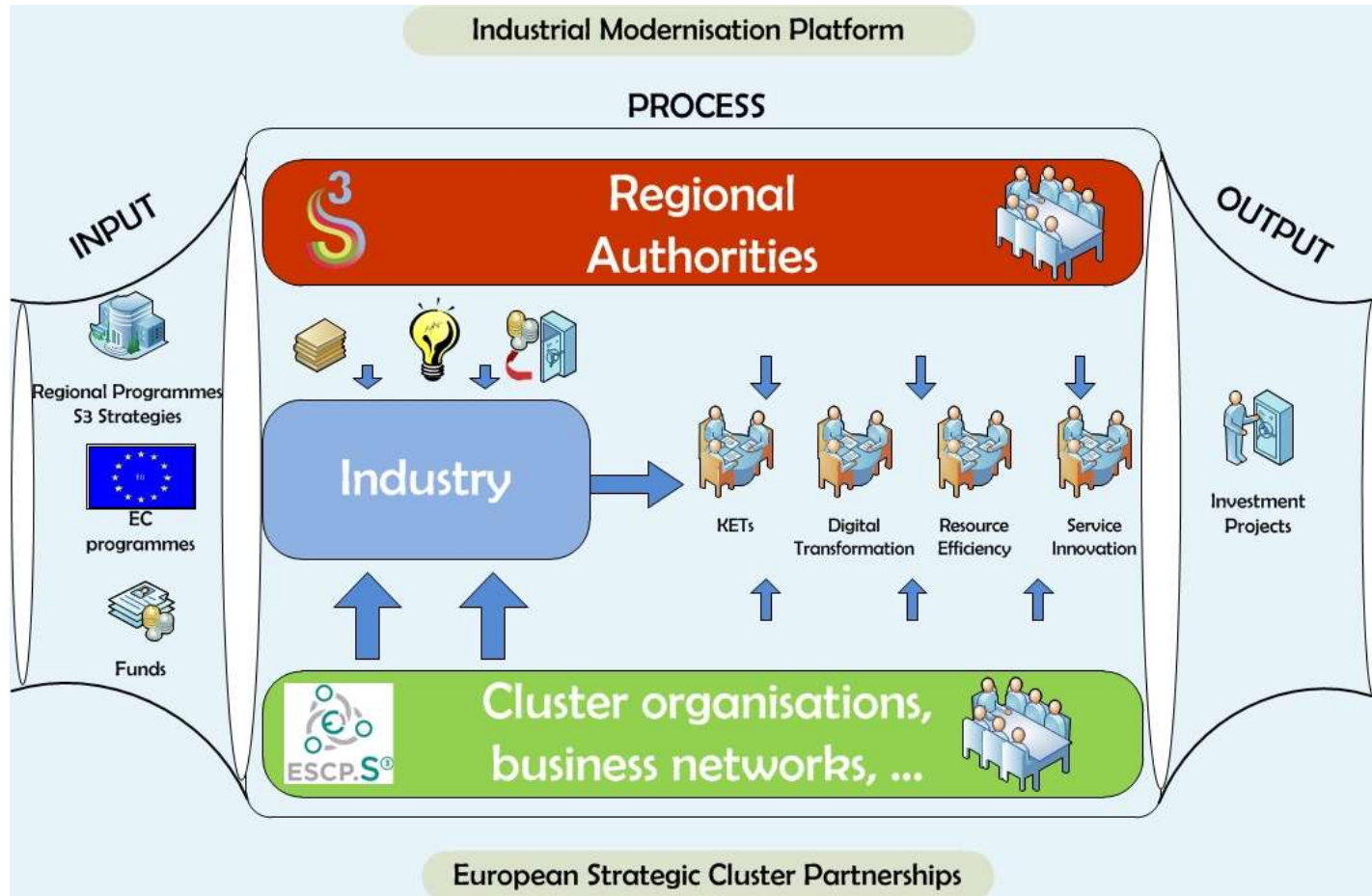


+ linkages with PPPs under Horizon2020, European Innovation Partnerships, Joint Technology Initiatives, Joint Programming Initiatives, Knowledge and Sector Skills Alliances, Enterprise Europe Network, etc.



European
Commission

Strategic cross-regional collaboration



<http://s3platform.jrc.ec.europa.eu/industrial-modernisation>
www.clustercollaboration.eu/news/call-expression-interest-towards-european-strategic-cluster-partnerships

50 regions involved in 10 thematic areas under Smart Specialisation Platform for Industrial Modernisation



**Advanced
manufacturing
for energy
applications**



3D Printing



**Innovative
use of non-
food biomass**



**Efficient &
Sustainable
Manufacturing**



**Nano-
Enabled
Products**



Industry 4.0



Textile Innovation



Medical Technology



Sports Innovation

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

- Cluster facilitated projects for new industrial value chains (Horizon2020, ca. €130 million)
- European Strategic Cluster Partnerships for smart specialisation investments (COSME 2017, €2.8 mio proposed)
- Resource efficiency: Green Action Plan for SMEs (European Resource Efficiency Excellence Centre, Low Carbon Business Action with Mexico and Brazil & more)
- European Observatory for Clusters and Industrial Change (COSME 2016, €2.8 million)





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

European Strategic Cluster Partnerships for Smart Specialisation Investments



- Coordination action
- COSME countries
- Cluster organisations, other business network organisations, technology centres & science parks
- Strengthening industry participation, cluster cooperation & inter-regional collaboration in implementation of smart specialisation strategies focusing on industry modernization
- €2,8 mln for 6 partnerships (plus 6 labelled non-funded)
- Next call: December 2017



European



#GROWyourREGION

GROW
your
REGIONⁿ

Boosting Smart
Interregional Collaboration
through Clusters

Valencia, Spain 8-9 November 2017



315
participants
from 25
countries

Co-Create and Exchange ideas on the future of clusters:

interregional collaboration through clusters is a key tool for supporting innovation, industrial modernisation & the scaling up of SMEs

the right partners – policy-makers, SME intermediaries & industry – need to be involved

dedicated support, new initiatives & sustainable partnerships are needed to advance collaboration in specialised themes

<http://ec.europa.eu/grow-your-region>

2 years
10/2017-
10/2019



European Observatory for Clusters & Industrial Change

To help regions & countries in designing cluster policies to accelerate industrial modernisation

To promote the development of world-class clusters with competitive industrial value chains across sectors

To boost entrepreneurship in emerging industries with growth potential

To provide SMEs with favourable regional ecosystems with better support for innovation & entrepreneurship

To facilitate SMEs' access to clusters in order to boost strategic inter-regional collaboration & investments in the implementation of smart specialisation strategies

To help SMEs to take up advanced technologies, digitalisation, new business models, creativity, service innovation & eco-innovative solutions



European Observatory for Clusters & Industrial Change

Statistical & trend analysis

Framework conditions & bottlenecks

Policy advice to 12 model demonstrator regions

Support for mutual cluster policy learning, mapping & cooperation

Advisory support to European Strategic Cluster Partnerships

Sectoral & cross-sectoral cluster mapping tool
(emerging industries and value chains)

Regional Ecosystem Scoreboard tool with bottleneck analysis & **European Service Innovation Scoreboard**

Trends reports, priority sector reports & smart guides including on entrepreneurship support

Indicators on high-growth enterprises, start-ups, gazelles, scale-ups, employees & wages, etc.

Analysis of linkages between clusters & industrial change, entrepreneurship/SME growth, innovation, internationalisation

European Cluster Policy Forum

Cluster programmes in Europe

European Cluster Week



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 **650 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



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

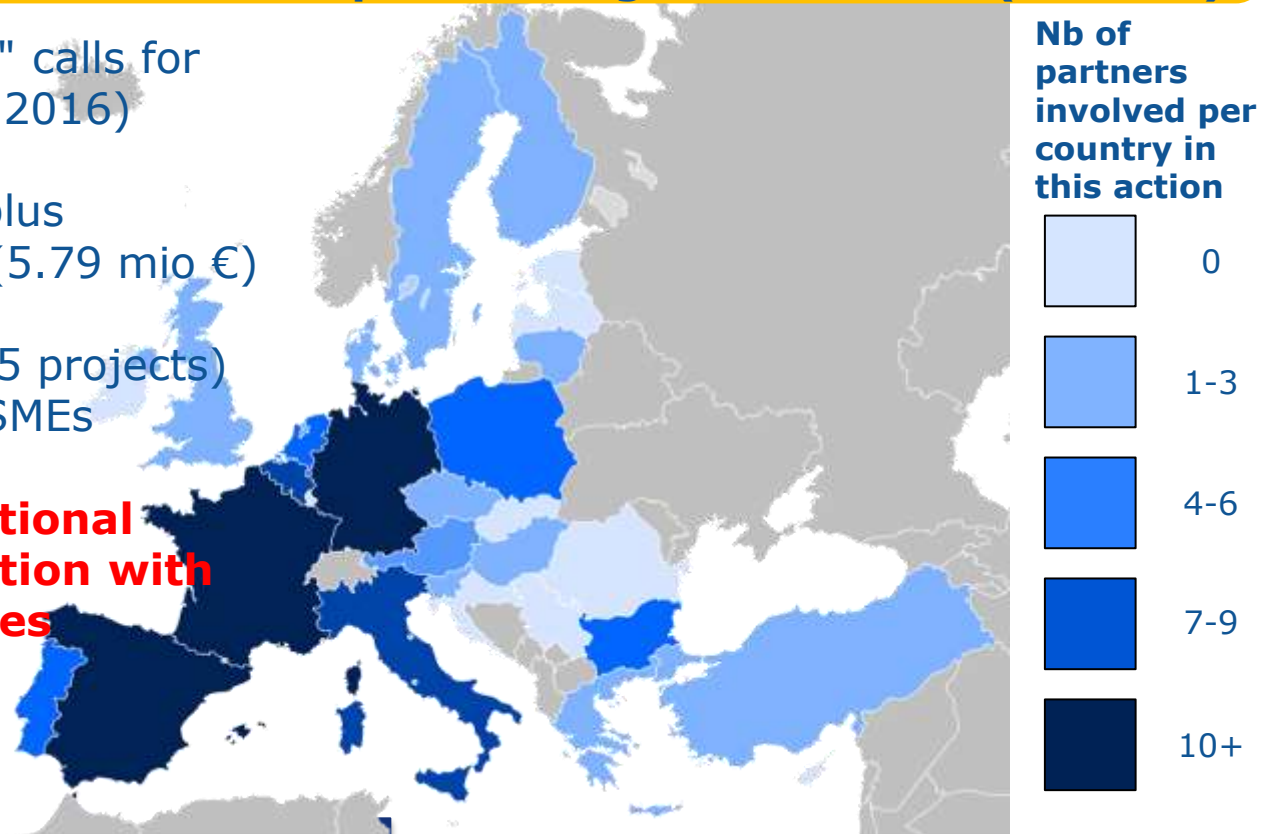
- "**Clusters Go International**" action promoting SME internationalisation towards 3rd countries
- 15 EU Cluster partnerships implementing joint strategies to go international

'Clusters Go International' action

Promoting cluster cooperation for industrial leadership in global markets through

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

- 2 "Cluster Go International" calls for proposals (2014/2015 and 2016)
- 15 projects (4.30 mio €) plus 17 expected new projects (5.79 mio €)
- 98 cluster organisations (15 projects) representing over 10,000 SMEs
- **Supporting joint international strategies and collaboration with partners in third countries for the benefit of SMEs**



Cluster Excellence programme

To raise innovation capacity and competitiveness of clusters by focusing on cluster management

- 1- Fix clear European Principles to increase transparency, accountability and efficiency
- 2- Reinforce cluster management excellence expertise across the EU and worldwide: review, simplification and consolidation of the labelling process
- 3- Build-up an inclusive and sustainable management structure for the labelling process at EU level

Next steps to enhance the European Cluster Policy

- Launch of **European Cluster Policy Forum** at the next **EU Industry Day** on 22/23 Feb. 2018 in Brussels
- Set up of **High-Level Expert Group on Clusters** in 2018



Moving towards Joint Cluster Initiatives

Connecting specialised eco-systems and clusters across Europe to boost industrial modernisation with a value chain focus

Dedicated support for more strategic and sustainable inter-regional collaboration related to specialisation priorities of regions

Using SME intermediaries to channel scale-up support to groups of SMEs

Focus on accelerating SME growth (covering business dev. & skills, advanced manufacturing and technologies, digital, resource-efficiency, internationalisation)

Linkages with the Enterprise Europe Network and mobility schemes

Joint investments across regional, sectoral and technological boundaries



Outlook for European Cluster Policy

High-Level Expert Group on Clusters to be set-up in 2018

New European Cluster Policy Forum supported by the European Observatory for Clusters and Industrial Change

European Cluster Week 2018 or 2019

Stronger use of thematic Smart Specialisation Platforms

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



European
Commission

For more see

<http://ec.europa.eu/growth/industry/policy/clusters/observatory>

<http://www.clustercollaboration.eu>

<http://s3platform.jrc.ec.europa.eu/industrial-modernisation>



or the Smart Guide to Cluster Policy, available at
<http://ec.europa.eu/growth/smes/business-friendly-environment/regional-policies/>

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Innovation and Advanced Manufacturing Directorate

European Commission's Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs

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<http://ec.europa.eu/growth/industry/policy/cluster>

