



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

France

An initiative of the European Union



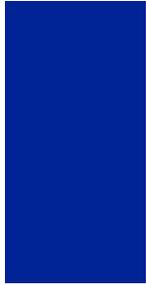


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Introduction



This document presents an overview of the cluster policy in France. Given its importance to contextualise the cluster policies (and related) analysed in the factsheets, a comprehensive outlook of the country in socioeconomic terms can be consulted in the [European Semester Country Report for France](#).

The European Semester was an instrument introduced to coordinate the EU Member States economic policies and address the economic challenges faced by the EU. Its goals are “to ensure sound public finances, to prevent excessive macroeconomic imbalances in the EU, to support structural reforms to create more jobs and growth, and to boost investment”. Thus, it focuses on the

following areas: business environment; financial and fiscal stability; green economy; public administration; labour market and skills; and, social protection and cohesion.

The COVID-19 pandemic has caused an unprecedented economic shock to the European and global economy. In response, policymakers at EU and national level have acted decisively and at short notice to make available very significant financial resources, notably through the Recovery and Resilience Facility, to tackle the threat of a prolonged downturn. [National recovery and resilience plans](#) have been drafted in each Member State to ensure a recovery that addresses the challenges identified in the European Semester. In France, clusters have acted as a partner in drafting the plan and setting the strategic priorities¹ although they are not directly mentioned in the National recovery and resilience plan.

¹ ECCP, Clusters in the National Recovery Plans: France. Available at: <https://clustercollaboration.eu/news/clusters-national-recovery-plans-france>

01

Industrial ecosystems and cluster landscape



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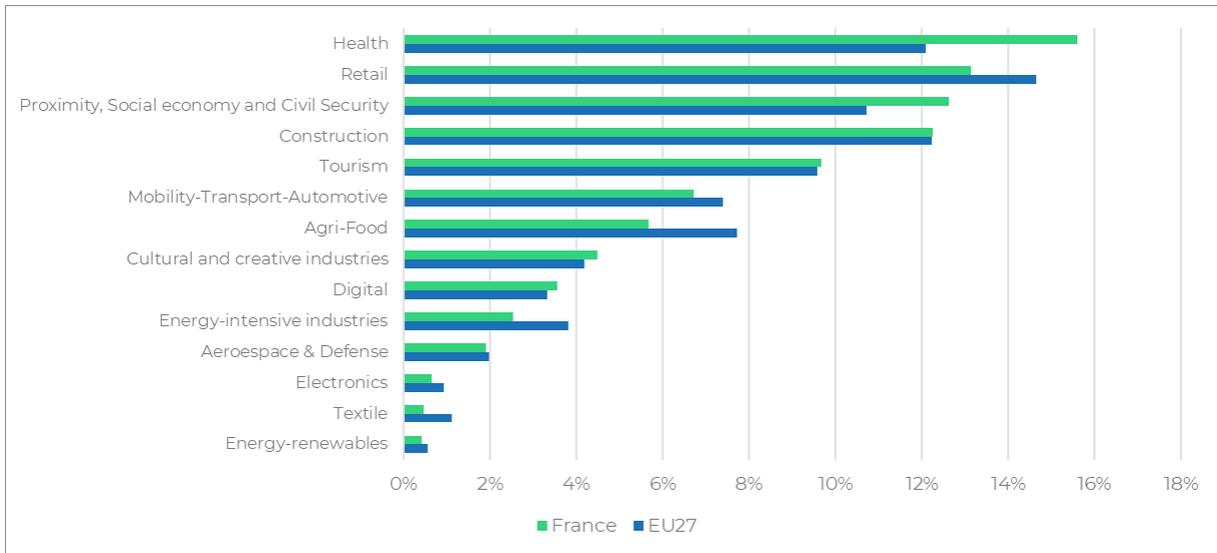


1. Industrial ecosystems and cluster landscape

Employment in the 14 ecosystems in the country

As part of its Industrial Strategy (March 2020), the European Commission has selected 14 industrial ecosystems that are particularly relevant in Europe and encompass all players operating in a value chain. The following graph shows the proportion of the country’s employment accounted for by each ecosystem, as well as the equivalent figure for the EU27 on average. The ecosystems are ordered, from top to bottom, according to the amount of employment in the country. When the bar for the country is higher than that of the EU27, it indicates that the country is more specialised in that ecosystem.

Graph 1: Employment in the ecosystems



Source: Own elaboration from Eurostat and National Statistical Offices



Regionally relevant nodes

Economic activity, and therefore employment, is not equally distributed in all regions. Specialisation can be measured through Location Quotients (LQ) that reflect the relative specialisation of an activity in a region compared to the EU average. If the LQ for a given activity-region combination is above 1.5, it is considered a specialisation node, and if the activity accounts for at least 1 % of total employment in the region, it is considered regionally relevant. The following tables shows the total number of regionally relevant specialisation nodes in each region in the country and identifies the top five most specialised of these nodes. The first table focuses on the 88 NACE 2-digit activities or sectors, totalling 98 in the country, while the second table is based on the 14 ecosystems, which total 11 in the country.

Table 1: Regionally relevant sectoral nodes

Region	Number of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
FR1: Île-de-France	12	J61 - Telecommunications	N78 - Employment activities	N77 - Rental & leasing	J58 - Publishing activities	R90 - Arts & entertainment
FRB: Centre-Val de Loire	4	C22 - Manuf. of rubber & plastic products	N82 - Business support activities	N78 - Employment activities	Q88 - Social work without accommodation	
FRC: Burgundy-Franche-Comté	5	Q88 - Social work without accommodation	C26 - Manuf. of electronic & optical products	M71 - Architecture, engineering	Q87 - Residential care	C22 - Manuf. of rubber & plastic products
FRD: Normandy	5	Q88 - Social work without accommodation	M71 - Architecture, engineering	C10 - Manuf. of food products	C20 - Manuf. of chemical products	Q87 - Residential care
FRE: Hauts-de-France	5	M73 - Advertising & market research	Q88 - Social work without accommodation	Q87 - Residential care	N82 - Business support activities	N80 - Security, investigation activities
FRF: Grand Est	2	Q88 - Social work without accommodation	N78 - Employment activities			
FRG: Loire Region	6	C10 - Manuf. of food products	Q88 - Social work without accommodation	M71 - Architecture, engineering	N78 - Employment activities	Q87 - Residential care
FRH: Brittany	4	C10 - Manuf. of food products	N81-Buildings services and landscaping	Q88 - Social work without accommodation	F43 - Specialised construction act.	
FRI: New Aquitaine	3	Q88 - Social work without accommodation	Q87 - Residential care	H53 - Postal & courier activities		
FRJ: Occitania	4	M72 - Scientific research & development	C30 - Manuf. of other transport equipment	M71 - Architecture, engineering	Q88 - Social work without accommodation	
FRK: Auvergne-Rhône-Alpes	3	N78 - Employment activities	Q88 - Social work without accommodation	F43 - Specialised construction act.		
FRL: Provence-Alpes-Côte d'Azur	4	Q88 - Social work without accommodation	N81-Buildings services and landscaping	L68 - Real estate	N78 - Employment activities	
FRM: Corsica	6	N81-Buildings services and landscaping	Q88 - Social work without accommodation	F43 - Specialised construction act.	O84 - Public adm., defence, soc. security	I55 - Accommodation
FRY1: Guadeloupe	5	O84 - Public adm., defence, soc. security	Q88 - Social work without accommodation	N80 - Security, investigation activities	Q87 - Residential care	P85 - Education
FRY2: Martinique	6	N80 - Security, investigation activities	G45-Trade & repair of motor vehicles	Q88 - Social work without accommodation	O84 - Public adm., defence, soc. security	N81-Buildings services and landscaping
FRY3: French Guiana	6	E38 - Waste activities	N80 - Security, investigation activities	Q88 - Social work without accommodation	P85 - Education	O84 - Public adm., defence, soc. security
FRY4: Réunion	6	Q88 - Social work without accommodation	P85 - Education	T97 - Households as employers act.	O84 - Public adm., defence, soc. security	Q87 - Residential care
FRY5: Mayotte	12	Q88 - Social work without accommodation	R90 - Arts & entertainment	F43 - Specialised construction act.	R93 - Sports, amusement, recreation	O84 - Public adm., defence, soc. security

Source: Own elaboration from Eurostat and National Statistical Offices



Table 2: Regionally relevant ecosystem nodes

Region	Number of nodes	Node 1	Node 2
FR1: Île-de-France	2	Digital	Cultural and creative industries
FRB: Centre-Val de Loire	0	-	-
FRC: Burgundy-Franche-Comté	2	Electronics	Health
FRD: Normandy	0	-	-
FRE: Hauts-de-France	1	Health	-
FRF: Grand Est	0	-	-
FRG: Loire Region	0	-	-
FRH: Brittany	0	-	-
FRI: New Aquitaine	0	-	-
FRJ: Occitania	0	-	-
FRK: Auvergne-Rhône-Alpes	0	-	-
FRL: Provence-Alpes-Côte d'Azur	0	-	-
FRM: Corsica	2	Construction	Proximity, Social economy and Civil Security
FRY1: Guadeloupe	0	-	-
FRY2: Martinique	1	Aerospace & Defense	-
FRY3: French Guiana	0	-	-
FRY4: Réunion	1	Proximity, Social economy and Civil Security	-
FRY5: Mayotte	2	Health	Proximity, Social economy and Civil Security

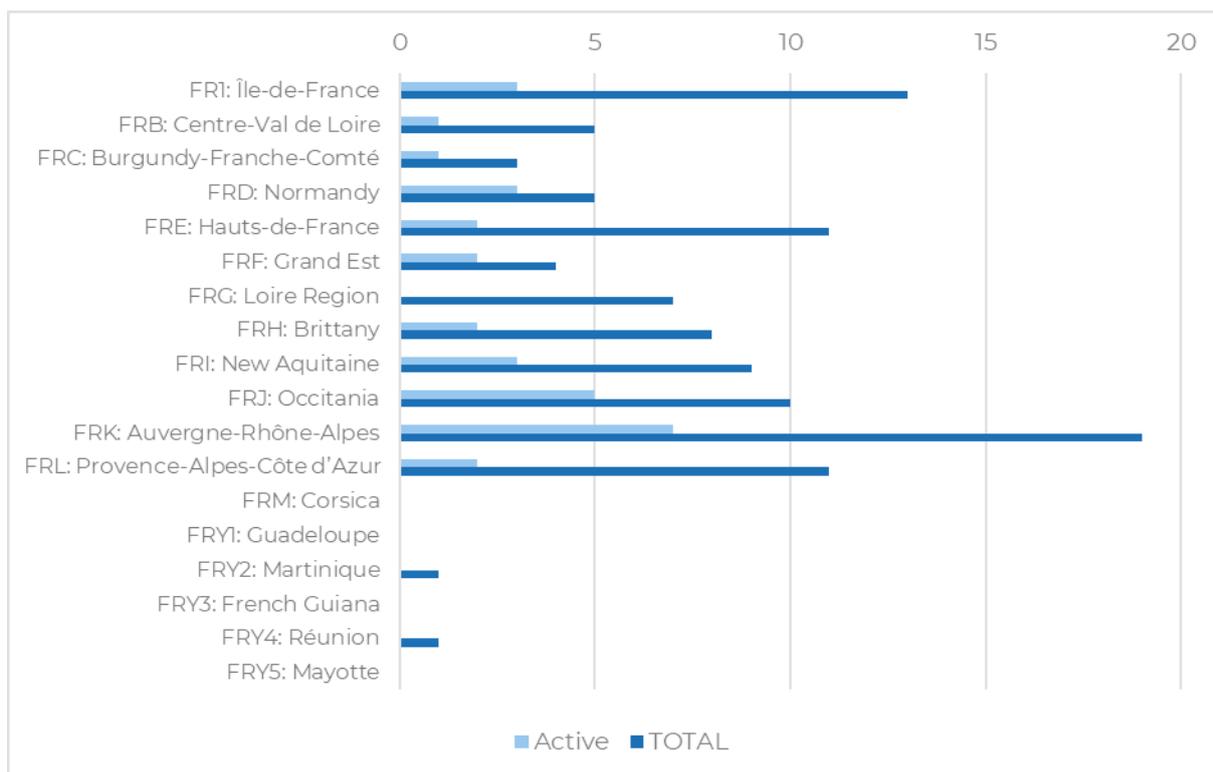
Source: Own elaboration from Eurostat and National Statistical Offices



Cluster organisations in the regions

There are 107 cluster organisations registered on the ECCP in the country, 31 of which can be considered active on the ECCP, having updated their profiles during the first half of 2021. The following graph shows the presence of cluster organisations in the different regions.

Graph 2: Cluster organisations profiled and active on the ECCP



Source: Own elaboration from Eurostat and National Statistical Offices

02

National cluster policy, programmes and initiatives



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2. National cluster policy, programmes and initiatives

Policy type:	National cluster policy
Policy name:	Competitiveness Clusters ("Pôles de compétitivité")
POLICY OBJECTIVES 	<p>Enhancing the visibility of clusters</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Supporting cluster excellence and professionalisation of cluster management</p> <p>Strengthening the network of cluster organisations/cross-clustering</p> <p>France has had a national cluster policy since 2004. The previous phases targeted mainly R&D industrialisation and innovation support. The policy is now in its fourth phase (2019-2022), focusing on cluster collaboration, involvement in European projects (Horizon 2020 and Horizon Europe) and promotion of cluster excellence.</p> <p>The policy of the Enterprise clusters ("Grappes d'entreprises") initiated in 2009 aimed to complement the Competitiveness clusters policy. It was specifically targeted at micro and small companies in sectors with low R&D uptake, that are less represented in competitiveness clusters (food industry, textile, metallurgy, naval construction, etc.). The Enterprise clusters policy terminated in 2014.</p>
POLICY FOCUS 	<p>No specific focus</p> <p>The policy does not focus on any specific sector, the main target group is innovative SMEs.</p>



Policy type:	National cluster policy
Policy name:	Competitiveness Clusters ("Pôles de compétitivité")
RESPONSIBLE AUTHORITIES 	<p>Both drafting and implementation</p> <p>The Ministry of the Economy and Finance is in charge of drafting and implementing the national cluster policy. Funding used to be provided by the State (via a special fund – the FUI, and its regional antennas - DIRECCTE), the regions and local authorities, and the private sector. The State is planning to withdraw its contribution to the funding of clusters, leaving this responsibility to the regions, but this option is still under discussion.</p> <p>The State is supported by different partners to support cluster organisations and cluster members:</p> <p>Bpifrance and Caisse des Dépôts, the public investment banks;</p> <p>ANR, the state research agency;</p> <p>Different regional agencies depending on the regions.</p> <p>The Enterprise clusters policy was initiated by the Ministry of Territorial Development and implemented by the Interministerial Delegation for Territorial Development and Regional Attractiveness (DATAR).</p> <p>France Clusters is the umbrella organisation supporting all types of cluster organisations, cluster members and territories in the implementation of cluster-related projects. It provides training and advice, mentorship, help for internationalisation, organises events and forums to exchange practices, etc. It is co-financed by the State, public investment banks (Caisse des Dépôts and Banque des Territoires), the European Union and some French regions (Nouvelle Aquitaine and Provence Alpes Côte d'Azur).</p>
BENEFICIARIES 	<p>SMEs</p> <p>Cluster organisations</p> <p>Research organisations</p> <p>Academic institutions</p> <p>Start-ups</p> <p>Large firms</p> <p>Technology centres</p> <p>Funding and technical support channelled through this policy is provided to cluster organisations and their members, i.e. enterprises (large and small), research organisations, academic institutions focused on technology and technology centres, etc.</p>



Policy type:		National cluster policy
Policy name:		Competitiveness Clusters ("Pôles de compétitivité")
INSTRUMENTS 	Financial	<p>Support to R&D projects, SMEs becoming cluster members, etc.</p> <p>Application to labelling schemes and similar initiatives</p> <p>Subsidies to hire personnel</p> <p>Subsidies for cluster infrastructure (e.g. offices, equipment)</p>
	Technical assistance	<p>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</p> <p>Support for soft skills development: coaching, management training, upskilling/reskilling</p> <p>Support for networking and partnership building (at national and/or international level)</p>
	Explanation	Funding covers administrative spending of cluster organisations (in staff, office space, office supplies, etc.), and project funding for their members. Since 2018, cluster organisations can apply via the Ministry of the Economy for a quality label. As regards non-financial support, the Ministry organises trainings for hard and soft skills and provides support to internationalisation to cluster organisation and their members.
HISTORY 	Period	Limited period
	Ending year (for policies with limited period)	<p>2015 (Enterprise clusters)</p> <p>2018 (third phase of the Competitiveness clusters)</p>
	Starting year	2019 (fourth phase of the Competitiveness clusters)
	Explanation	<p>The first French Competitiveness cluster policy was launched in 2004. Since then, four phases have taken place: phase 1 (2005-2008), phase 2 (2009-2012), phase 3 (2013-2018), phase 4 (2019-2022). The fourth phase started in 2019 and will last until 2022. The policy is evaluated between each phase.</p> <p>The Enterprise clusters Policy initiated 2009 and ended 2015. The policy was evaluated in 2014.</p>



Policy type:		National cluster policy
Policy name:		Competitiveness Clusters ("Pôles de compétitivité")
BUDGET 	Overall	EUR 2.7 billion have been spent by the State and the local authorities since 2004 for the Competitiveness clusters policy. EUR 25.5 million were spent for the Enterprise clusters policy.
	Annual	EUR 68 million were allocated by the State for the Competitiveness clusters policy in 2019.
	Source of funding	Private sector, State, and regions.
POLICY EVALUATION	Availability	Ex-post
	Results	All previous cluster policies have been evaluated. According to the last evaluation conducted in 2017, there are 71 competitiveness cluster organisations with 100 to 600 members per cluster (enterprises, research organisations, academic institutions focused on technology and technology centres), 20-50 projects within each cluster. Overall, the Competitiveness clusters policy has had positive effects on the auto-financing of R&D activities and employment of the business members of cluster organisations. However, the effect on export, turnover and productivity is more limited. The evaluation of the Enterprise clusters policy, carried out in 2014, was also positive. The policy generated the creation of 261 start-ups, and the implementation of 186 enterprises in the territories. 40% of cluster members had seen an increase in their turnover. However, the level of auto-financing was very low and many of them could not sustain the withdrawal of State funding in 2015.
POLICY ALIGNMENT WITH THE EU PRIORITIES 		Green economy Digitalisation Social inclusion

03

State of play of cluster policy





3. State of play of cluster policy

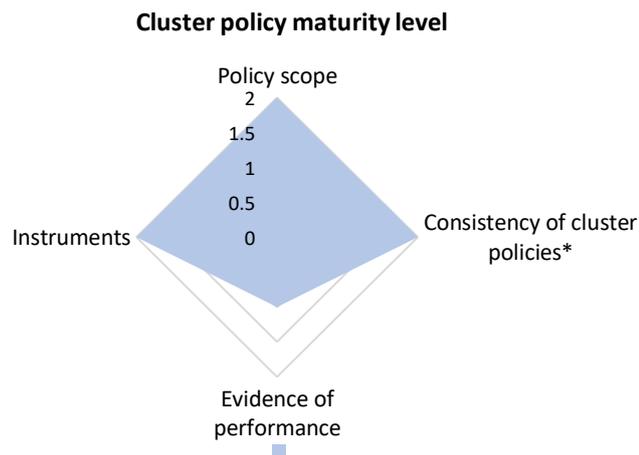
The data below illustrates how the country ranks in terms of maturity of cluster policy. The maturity index is based on a combination of factors presented in Chapter 2 and which are scored based on their existence:

- **Policy scope:** whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies (existence of broader policies = 1 point; existence of targeted cluster policies = 2 points)
- **Consistency of cluster policies:** assessment of the duration and experience of the country in doing cluster policies. This dimension assesses only existing cluster policies and not broader policies (no cluster policies available = 0 points; < 10 years of experience or > 10 years (but interrupted) = 1 point; > 10 years (but with clear continuity = 2 points)
- **Evidence of performance:** the existence of monitoring and evaluation mechanisms determines the degree of policy development in the country (no evaluations = 0 points; existence of evaluations of past policies or in-itinere = 0.5 points; existence of ex-ante and/or ex-post evaluations = 0.5 points)
- **Instruments:** whether the policies provide any instruments to support the policy implementation, being these financial and/or technical assistance (1 point for each type of instrument available)

It is important to note that the maturity does not reflect the performance of a country, but only the degree of development of their cluster policy at the moment when the data was collected (2020 and 2021). The maturity index illustrates how the country scores for each of these four dimensions (policy scope, consistency of cluster policies, evidence of performance and instruments) compared to the maximum score that they can reach.

	France	Maximum score
Policy scope	2	2
Consistency of cluster policies*	2	2
Evidence of performance	1	1
Instruments	2	2

* This dimension is scored solely if the country has a dedicated cluster policy and it assesses only cluster policies



State of play of cluster policy in the country

Policy evaluation (for terminated policies)	Availability of evaluations for terminated policies
	All previous phases of the French cluster policy have been evaluated.



	<p>The evaluation of the third phase of the Competitiveness clusters policy ending in 2017 showed mixed results. Enterprises belonging to cluster organisations (business cluster members) tend to increase the auto-financing of their R&D activities beyond public funding (3 euros spent for 1 euro of funding received). The policy has had a positive effect on employment among business cluster members. However, the effect on performance is limited: business cluster members do not export more than other enterprises, do not have a higher turnover nor a higher productivity. As a result, the fourth phase has strengthened the selection criteria in order to focus on excellence and introduced a quality label for cluster organisations. The goal is to encourage the amelioration of cluster members' performance regarding trade, turnover and productivity and strengthen international cooperation.</p> <p>The evaluation of the Enterprise clusters policy showed encouraging results, however funding stopped in 2015.</p>
Policy approach in the country	<p>Policy support for the activities of cluster organisations</p> <p>Specific policies to support cooperation projects</p> <p>Broad-based framework policies to support cooperation effectiveness</p>
Continuity	<p>There is an ongoing cluster policy for Competitiveness clusters since 2004: phase 1 (2005-2008), phase 2 (2009-2012), phase 3 (2013-2018), phase 4 (2019-2022).</p> <p>Other policies were initiated next to it (e.g. Enterprise clusters between 2009 and 2015) but did not benefit from continuity in funding. Some organisations initiated through Enterprise clusters still exist, however.</p> <p>Although there is no regional cluster policy, some regions take a more active role in the funding and development of clusters (Clusters d'Aquitaine, PRIDES PACA in Provence Alpes Côte d'Azur).</p>
Consistency	<p>> 10 years (but with clear continuity)</p> <p>The first three phases of the Competitiveness clusters policy focused on R&D and innovation, especially among SMEs. The results of the third phase evaluation have shown weaknesses in cluster performance, the fourth phase therefore seeks to emphasise cluster quality. There is also a willingness to foster collaboration through European-funded projects as national funding should decrease in the next years.</p> <p>The presence of France Clusters as supporting organisation for all types of clusters has ensured consistency and complementarity among the different cluster policies (Competitiveness, Enterprise, and regional initiatives) across the years.</p>

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