

**Internal Market, Industry,
Entrepreneurship and SMEs**

European Cluster Policy : Role of clusters in the future of industrial policy

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**Advanced Technologies, Clusters
& Social Economy**



*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 cluster initiatives

Building bridges across Europe's ecosystems



**Cluster
Excellence
Programme**

COSME
Programme for the
Competitiveness of
Enterprises and SMEs
2014-2020

COSME
Programme for the
Competitiveness of
Enterprises and SMEs
2014-2020

European Cluster Policy Forum



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

watch here:

<https://youtu.be/hoAtGU1casQ>

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

Using cluster partnerships to help clusters & their members go international

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

Cluster policies at centre of regional, national & international industrial policies

- **31 national cluster programmes** in 20 European countries with different extent of support

- **High importance for regions with 2.320 billion € of envisaged ESIF investments (2014-2020)**

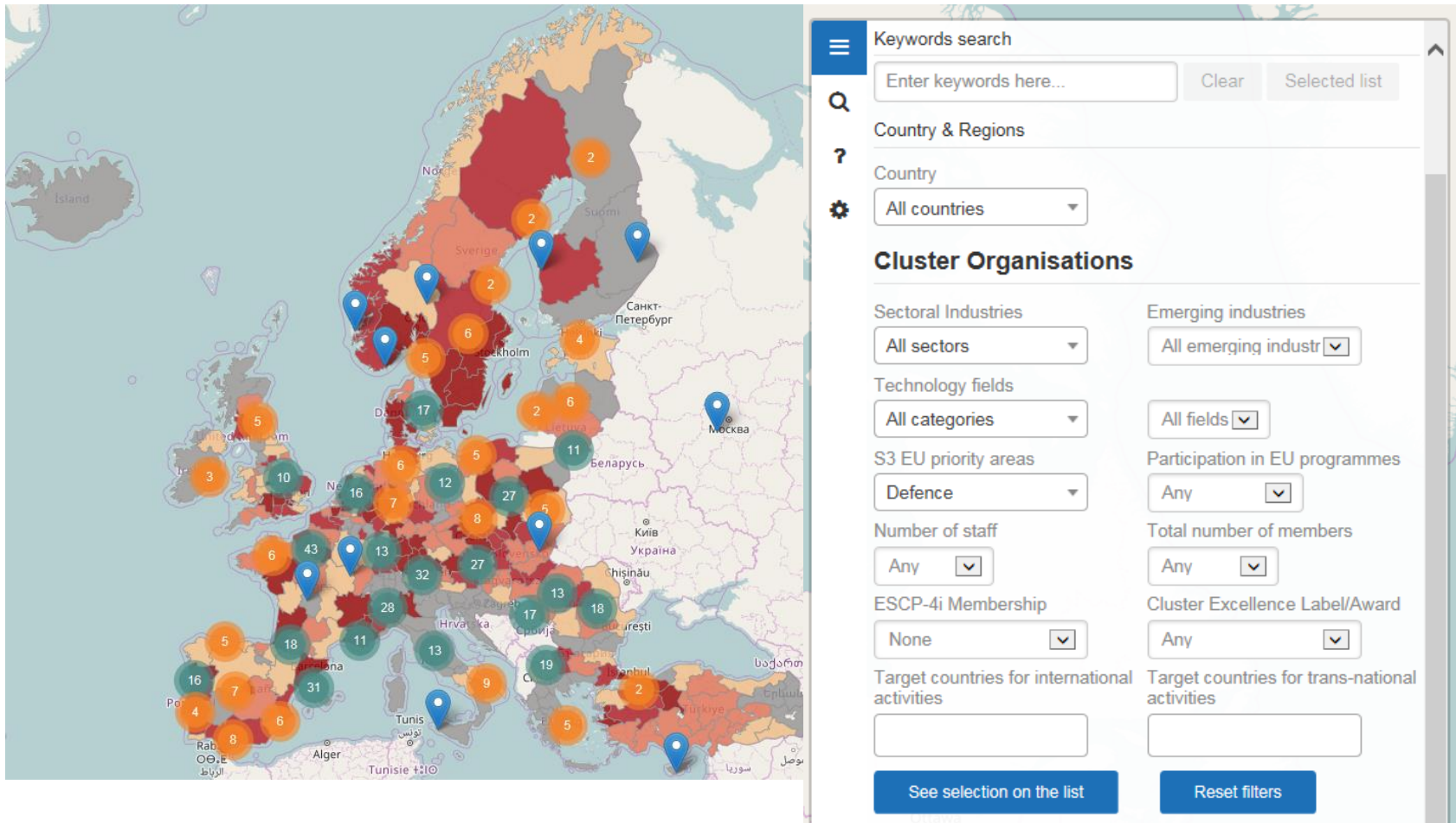
- **Many non-European countries too use clusters to promote growth**, e.g. Canada's industrial supercluster

=> *crucial instrument for economic development*

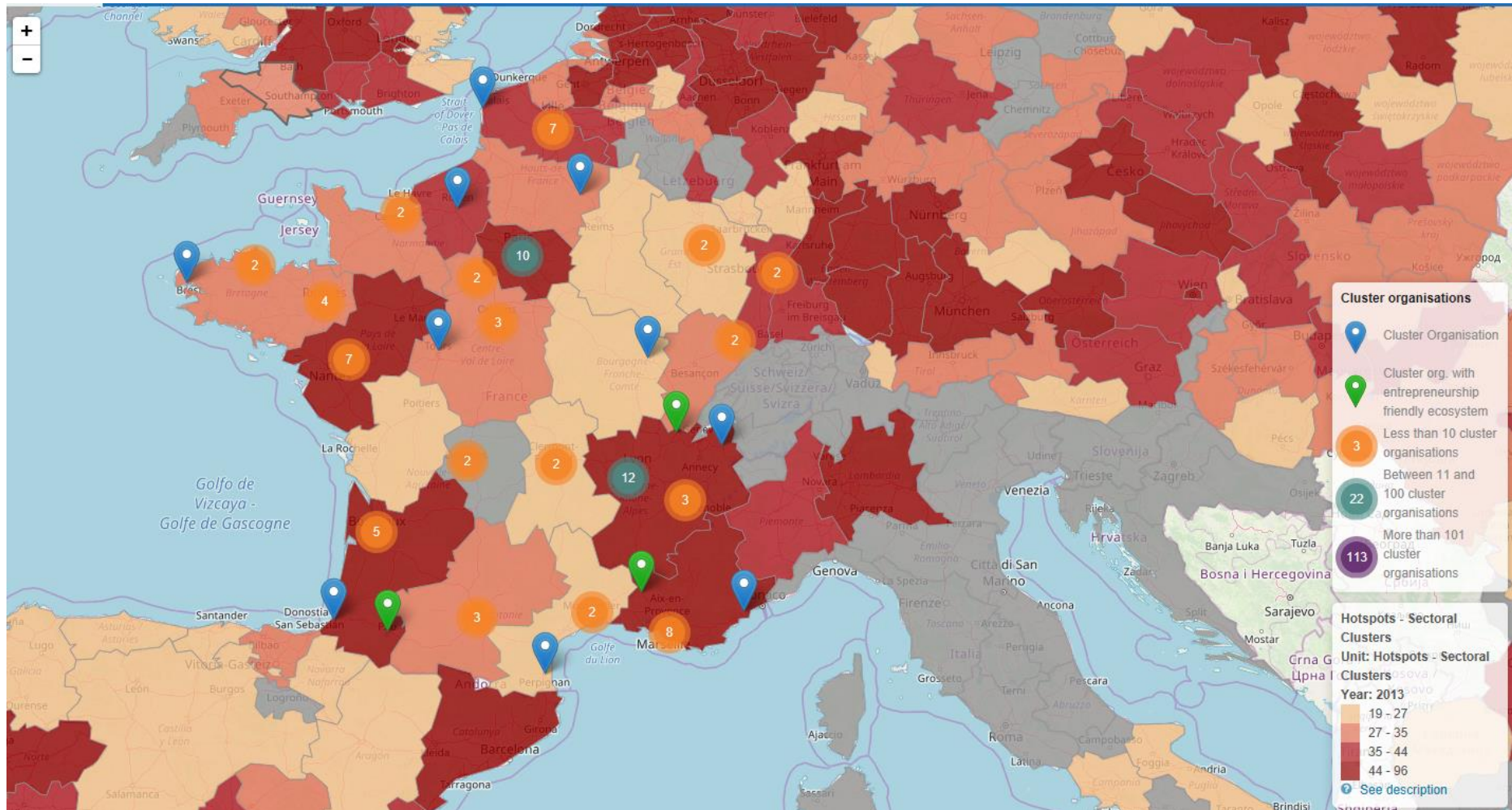


The European Cluster Collaboration Platform-ECCP

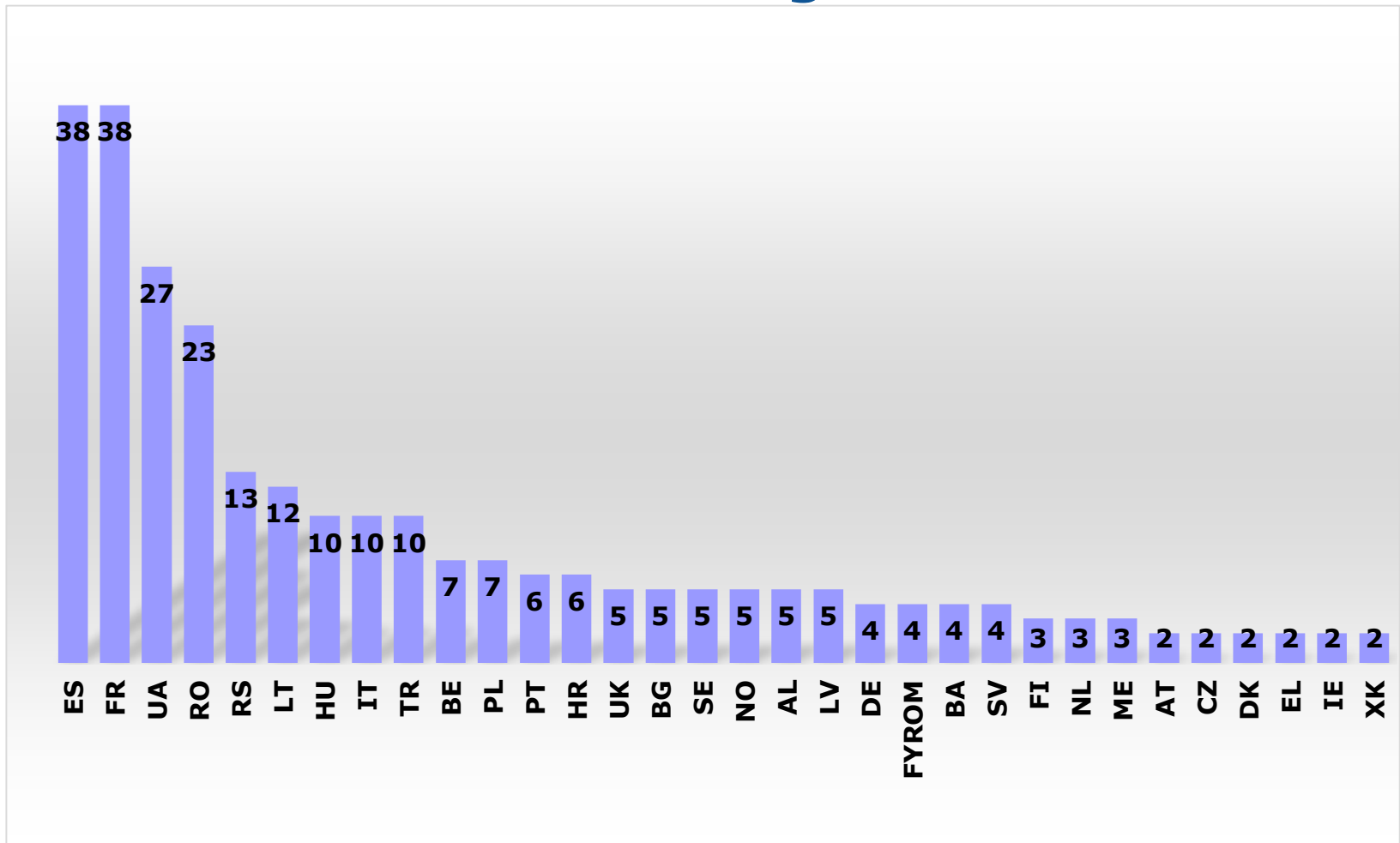
The Platform Connecting over 1000 Cluster Organisations



94 French Clusters on the ECCP



Cluster participation by COSME countries to the 5 EU matchmaking events of 2018

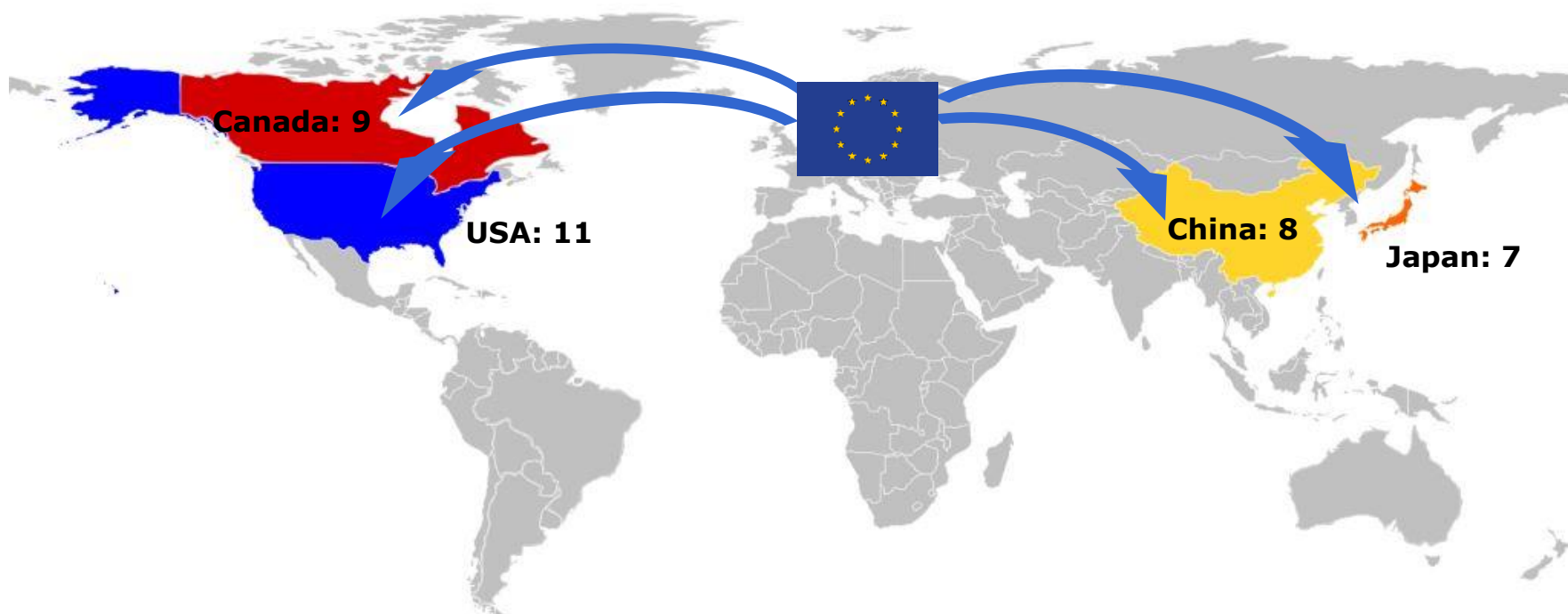


International Cluster Matchmaking events 2019

- EU-Taiwan: 6-8 March, Lyon (France)**
 Global industrie Fair - 24 EU and 12 TW clusters, 90 C2C and 134 C2B meetings
Focus areas: Manufacturing technologies; Mechanical engineering; Smart industry and connected factory: co-botics, augmented reality, digitisation of production
- EU-South MED: 9-11 April, Casablanca (Morocco)**
 Logismed Fair - 7 EU+ 2 SMEs and 22 South Med, 150 C2C
Focus areas: Transport and logistics; Agriculture and food industry; Energy and environment; ICT and Textile
- Europe: 14 May, European Cluster Conference, Bucharest (Romania)**
 114 EU, more then 500 C2C
- EU-Canada: 5-7 June, Toronto (Canada) (tbc)**
 Advanced manufacturing Expo / in cooperation with Canada's Superclusters- 27 EU and 6 CN superclusters, 100 C2C
Focus areas: Advanced manufacturing; digital industries, AI, agro-food and Blue Growth



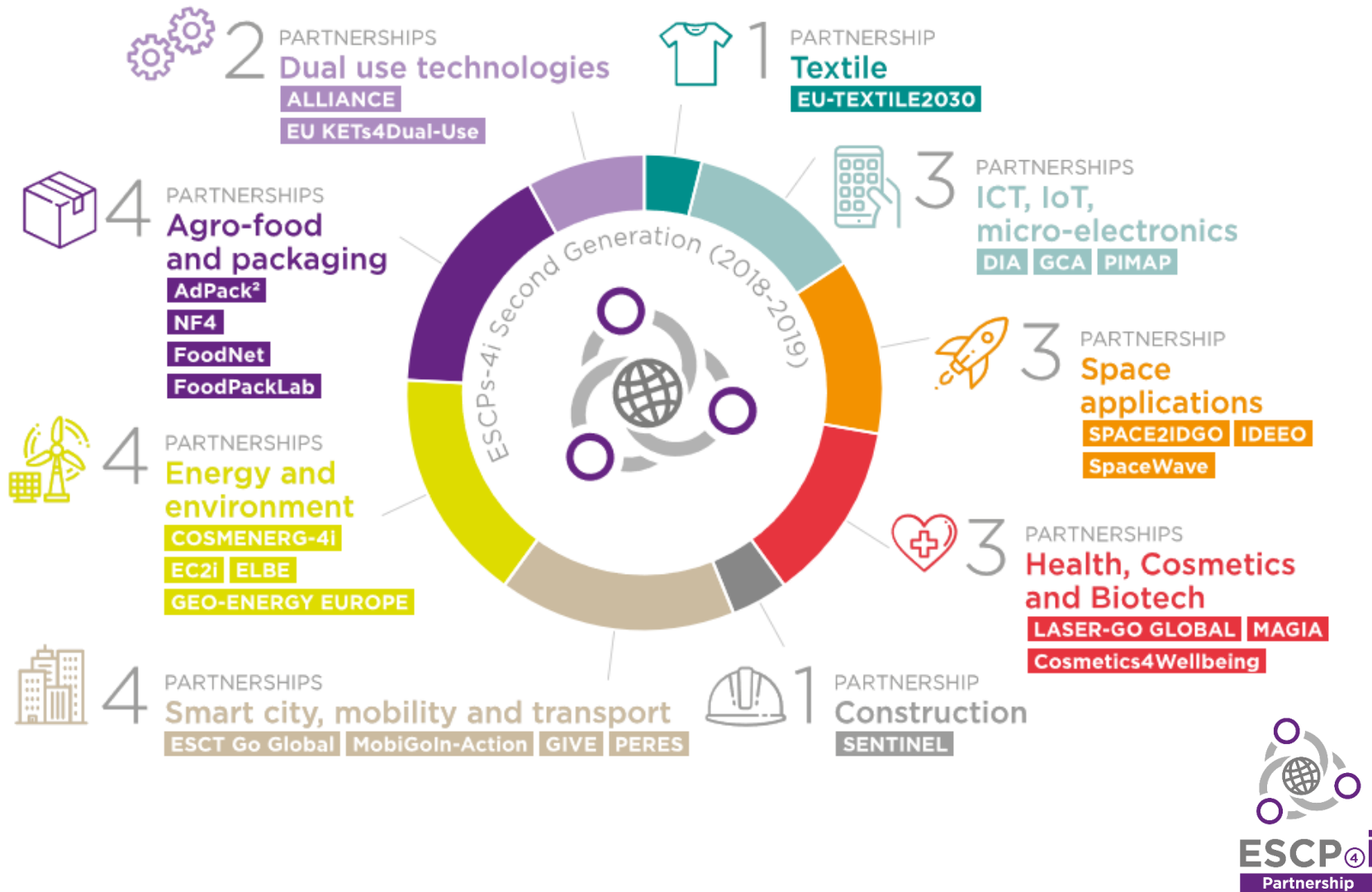
'Clusters Go International' Partnerships (2018-2019)



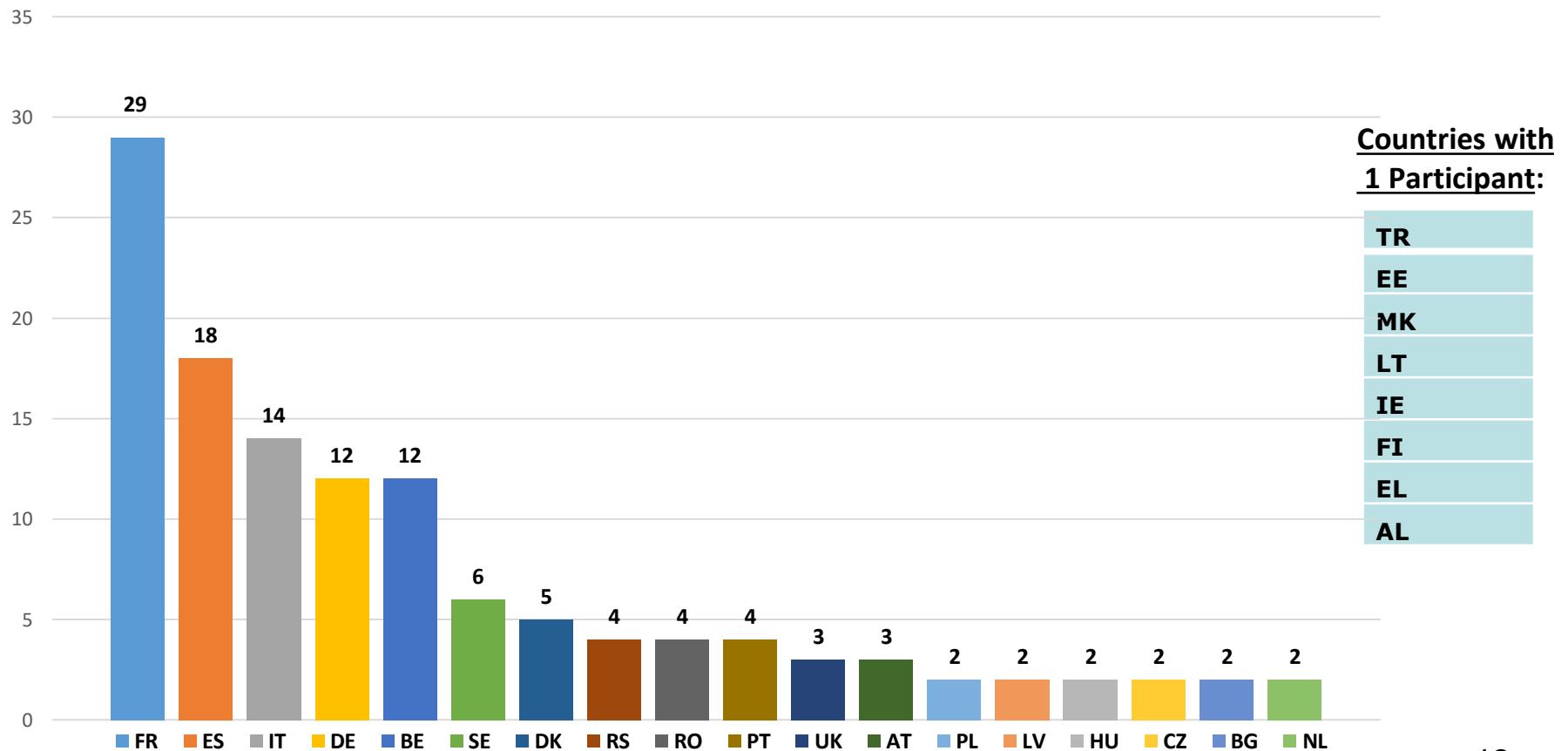
- **25 EU Cluster Partnerships Going International** (COSME, 7,24 M€)
- **134 cluster organisations representing over 19,000 SME**
- **Implement joint international strategies and support SMEs collaboration with partners in third Countries**

NEXT CALL for 'Clusters Go International' Program → Q3 2019

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



Cluster participation by COSME countries to EU 'Cluster Go International' Partnerships



Administrative Arrangements to promote Cluster cooperation

Administrative Arrangements on Cluster Cooperation 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 better help SMEs find strategic partners

- **USA (US Department of Commerce, April 2015)**
- **Korea (Ministry of Trade, Industry and Energy & KICOX, May 2018)**
- **Taiwan (Taipei Representative Office in the EU, June 2018)**
- **Canada (Ministry of Trade & Industry, in June 2019)**
 - 1st EU-Canada Cluster Matchmaking Event, Toronto, 5-7 June
 - Pre-networking event with 5 Canadian Superclusters in the context of the EU Cluster Week event, Hanover Messe, 1 April 2019

European Strategic Cluster Partnerships for smart specialisation investments

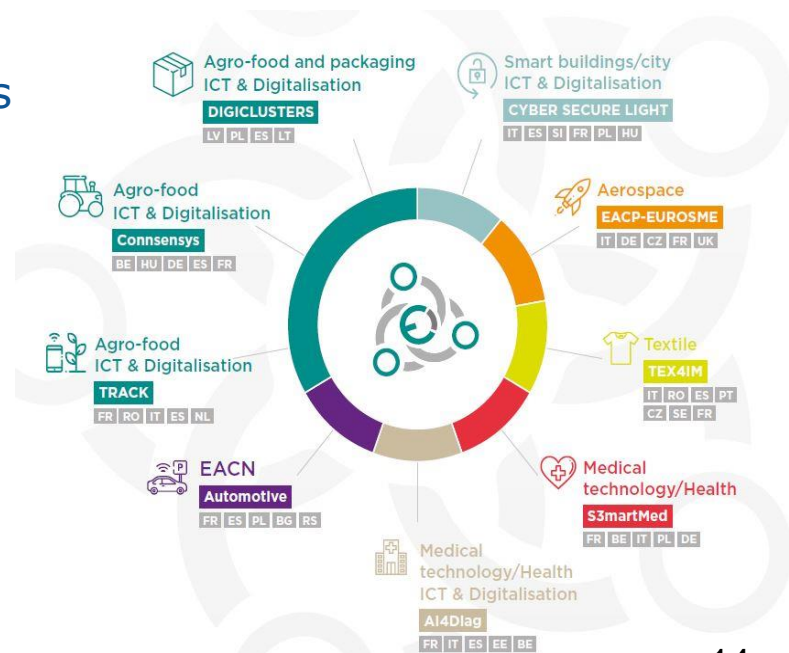
COSME

Programme for the
Competitiveness of
Enterprises and SMEs
2014-2020

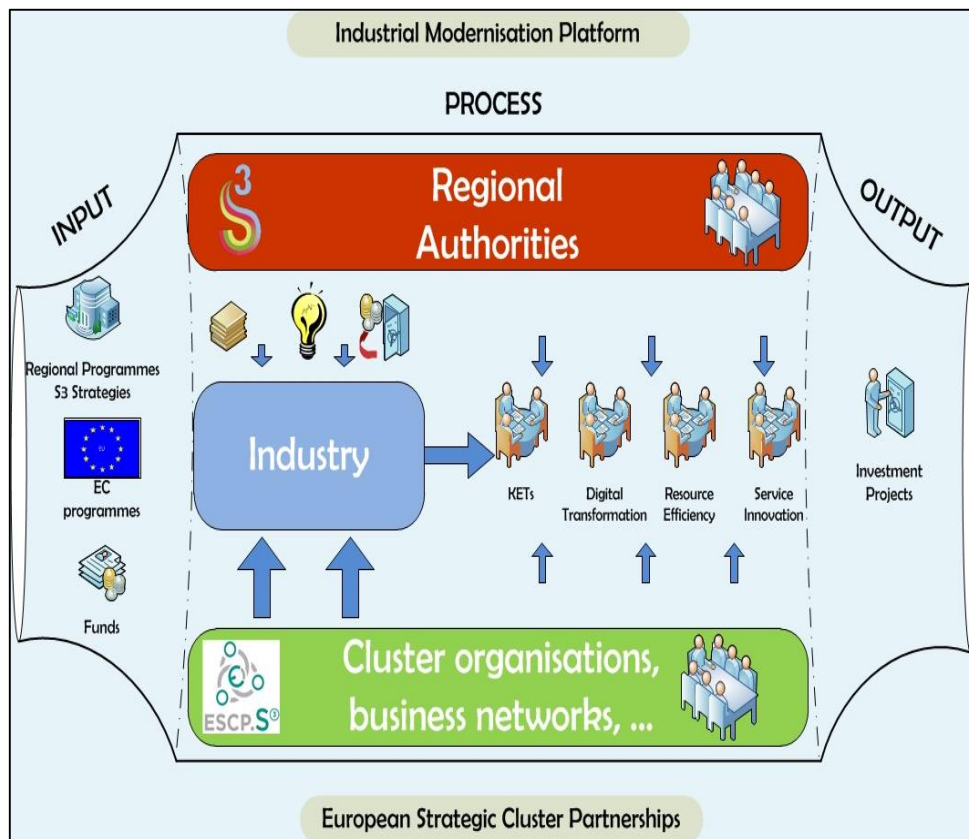
Boosting industrial competitiveness and investments in the EU via cross-regional cooperation and networking



- ◆ implementation of **9** cluster partnerships to boost **collaboration and investments** linked to smart specialisation & industrial modernisation
- ◆ **€3.1** million (COSME) with 346.000 €/project
- ◆ **57** project partners from **19** European countries
- ◆ more than **4.500 SMEs** directly or indirectly benefited
- ◆ complement mobilisation of interregional RIS3 partnerships of regional authorities under **Smart Specialisation Platform for Industrial Modernisation**



The Smart Specialisation Platform for Industrial Modernisation



Objective: facilitate the development of investment projects through interregional cooperation

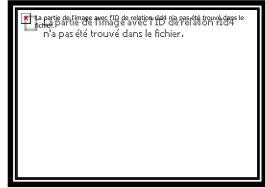
Role of clusters: mobilise the industry, participate in the development of projects

Role of the Commission: facilitate the process through dedicated EU actions and Smart Specialisation experts

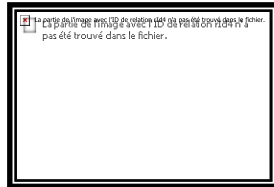
The Smart Specialisation Platform for Industrial Modernisation

20 thematic areas under S3 for Industrial Modernisation

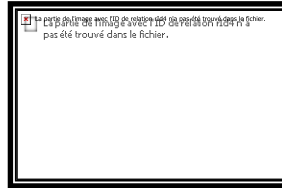
<http://s3platform.jrc.ec.europa.eu/thematic-areas>



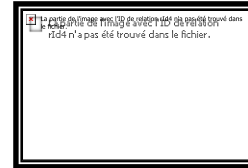
Advanced
manufacturing



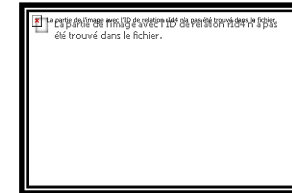
3D Printing



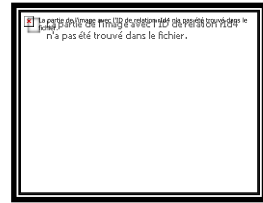
Non-food
biomass



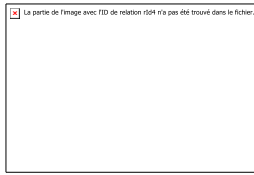
Sport



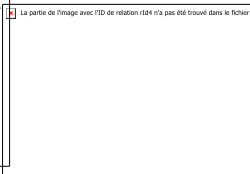
Nano-Enabled
Products



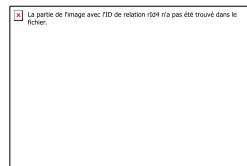
Digitalisation &
Safety for
Tourism



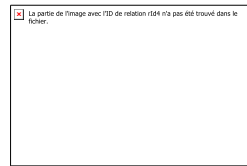
Personalised
medicine



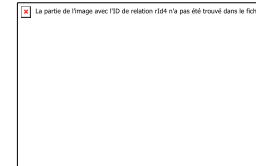
Social
Economy



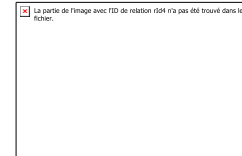
Mining
Industry



European
Cyber Valleys



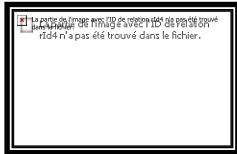
Artificial
intelligence &
Human
machine



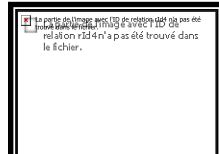
Chemicals



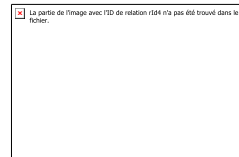
Advanced
materials
on batteries



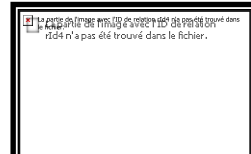
SMEs to
Industry
4.0



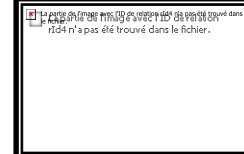
Textile
Innovation



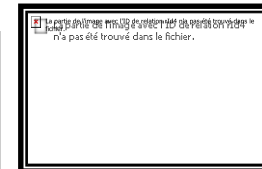
Water
Smart
Technologies



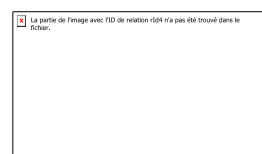
Medical
Technology



Efficient &
Sustainable
Manufacturing



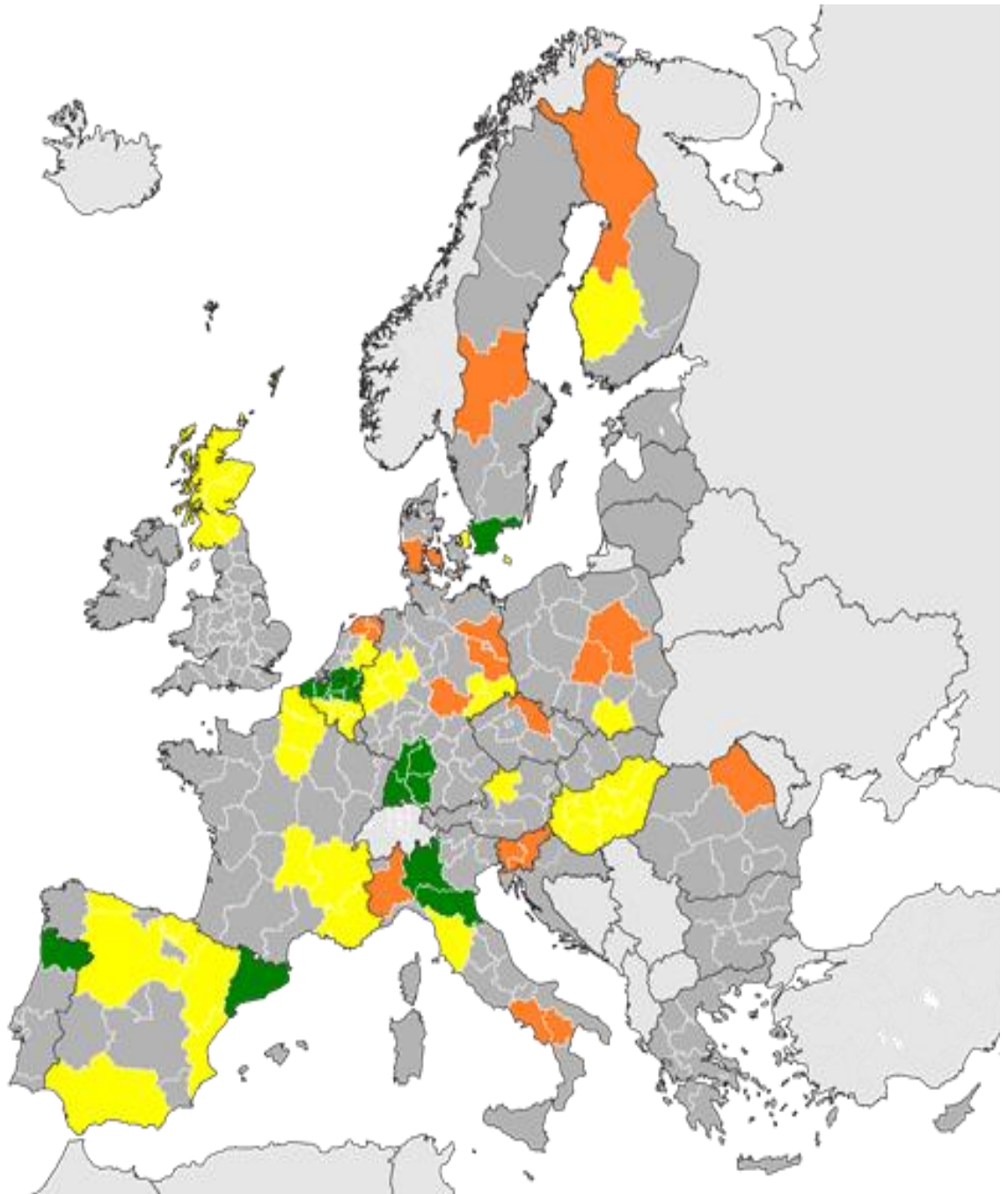
Photonics



Safe &
sustainable
mobility

Involved regions

- ✓ Regions that participate in 5 or more partnerships in **GREEN**
- ✓ Regions that participate in 2 to 4 partnerships in **YELLOW**
- ✓ Regions that participate in 1 partnership in **ORANGE**



Cluster facilitated projects for new industrial value chains INNOSUP-1

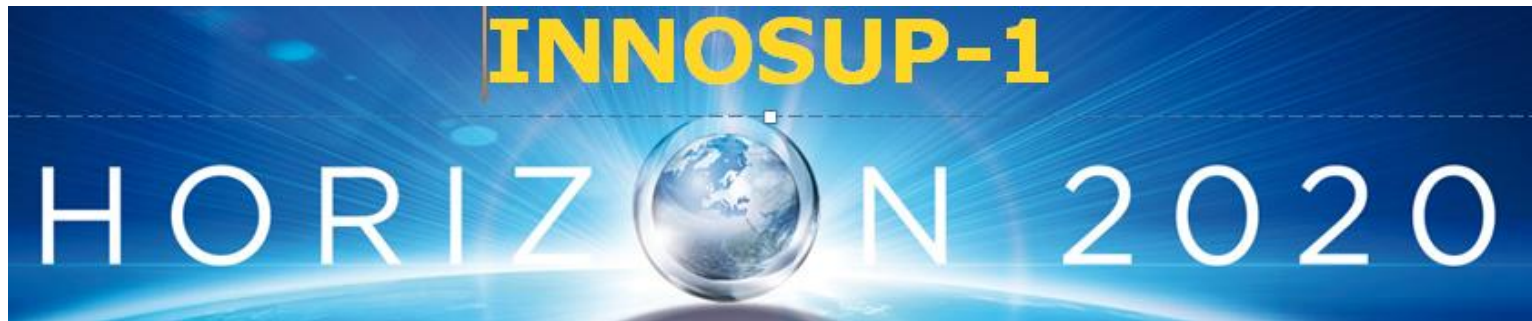
Supporting cross-sectoral & cross-regional innovation in SMEs

- 13 ongoing projects (2015-2020) reached out to > 3,000 SMEs & supporting 1700 SMEs directly, through innovation vouchers (€60,000)
- Max € 5 million per project with 75% of budget to support innovation in SMEs
- during 2015-2020, INNOSUP-1 aims to support 2,000 SMEs directly (€ 130 million)

Next call → apply by 3 April 2020 (25,15€ million)



What are 13 ongoing projects?



142 PARTICIPANTS



59,50M€ ALLOCATED

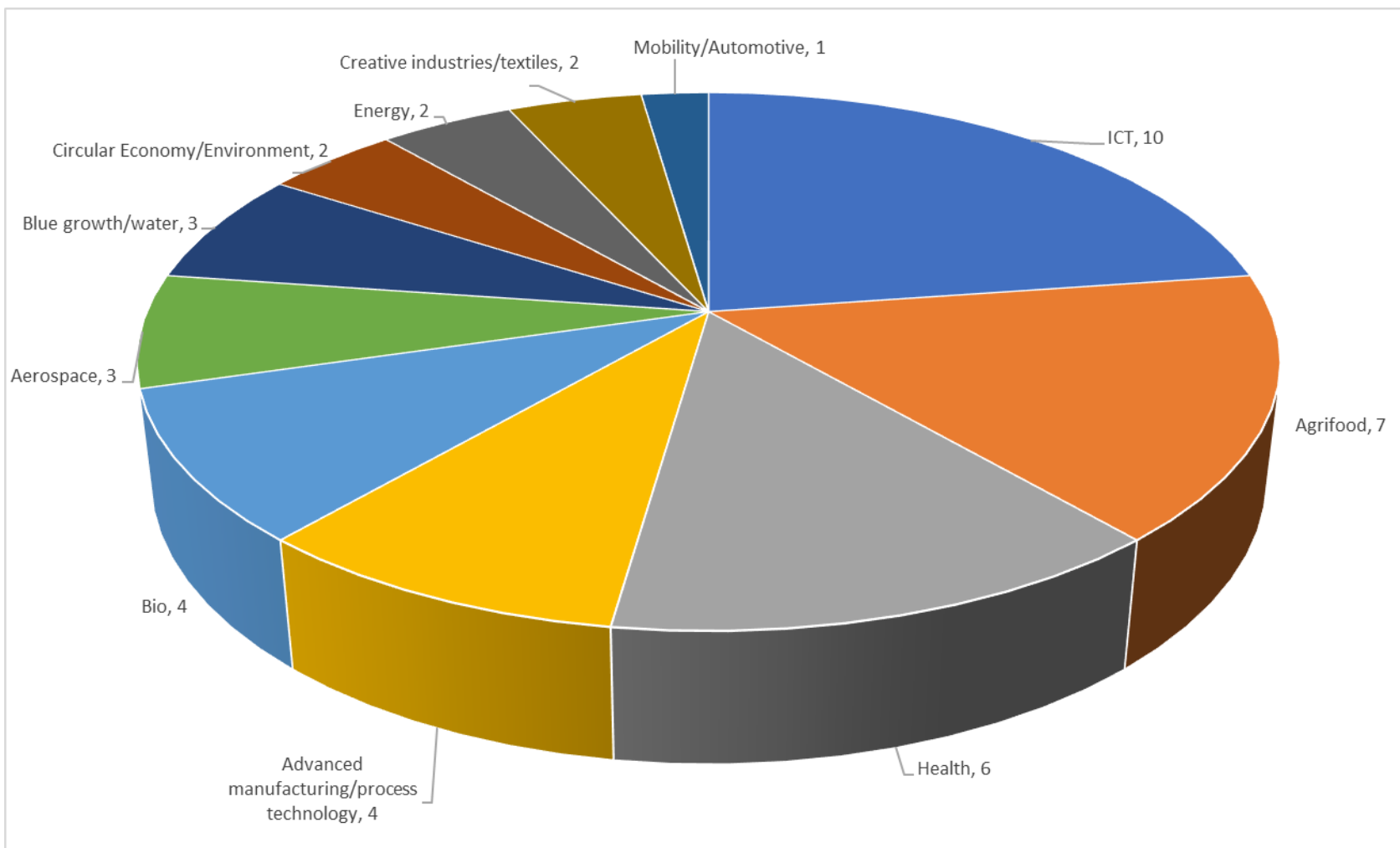


13 PROJECTS
COORDINATED

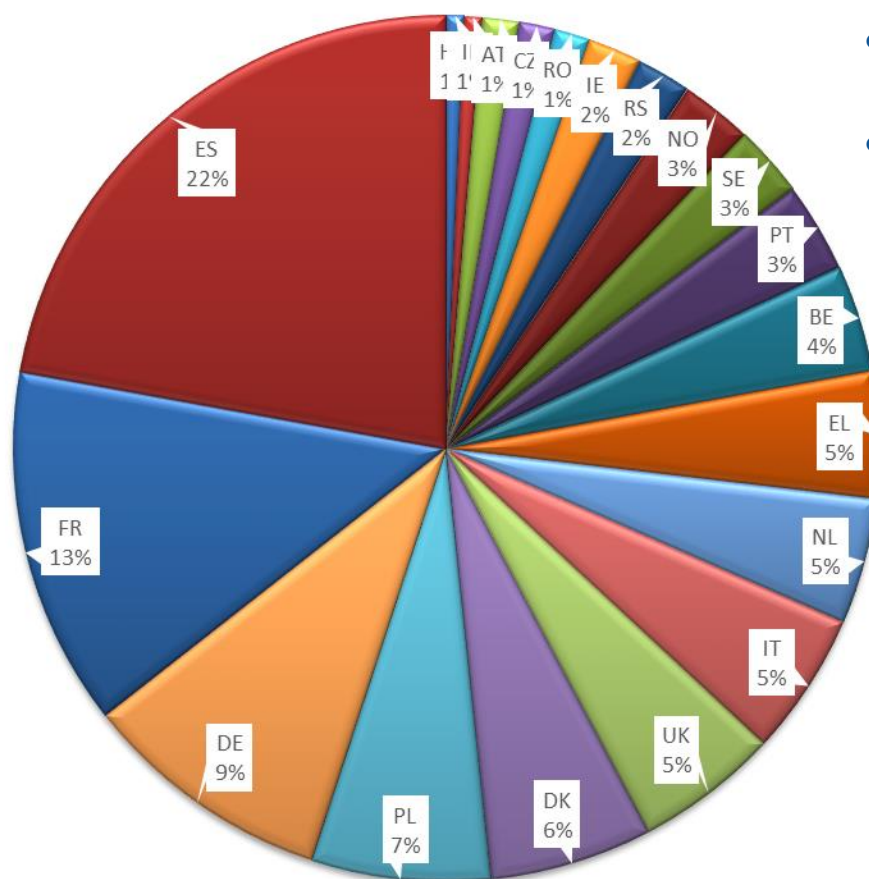
during 2015-2020, INNOSUP-1 aims to support 2,000 SMEs directly (€ 130 million)



Innosup-1 projects 2015-2017 thematic focus of 13 projects (9+4)

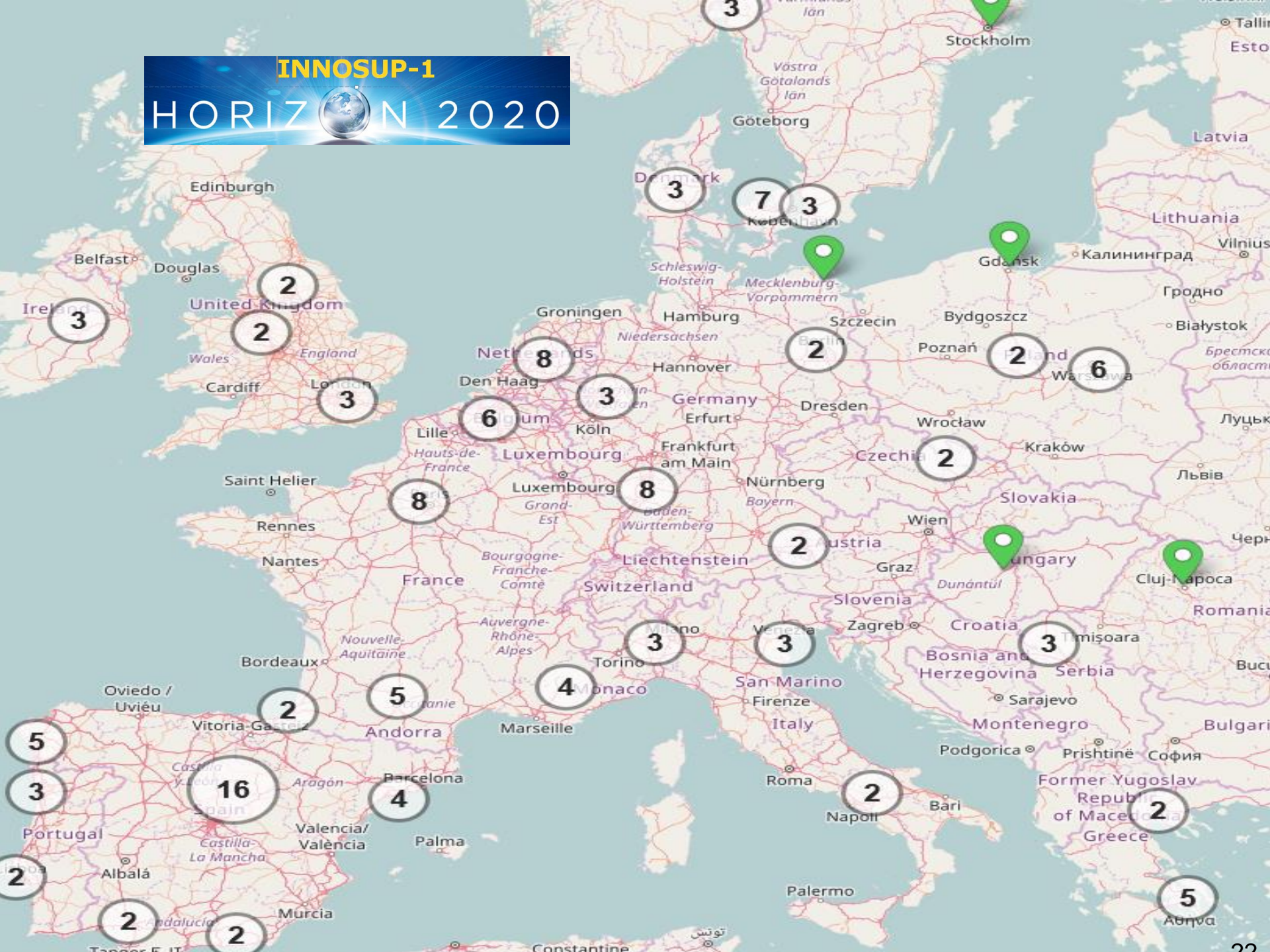


H2020 Innosup-1 ongoing 13 projects participation by country

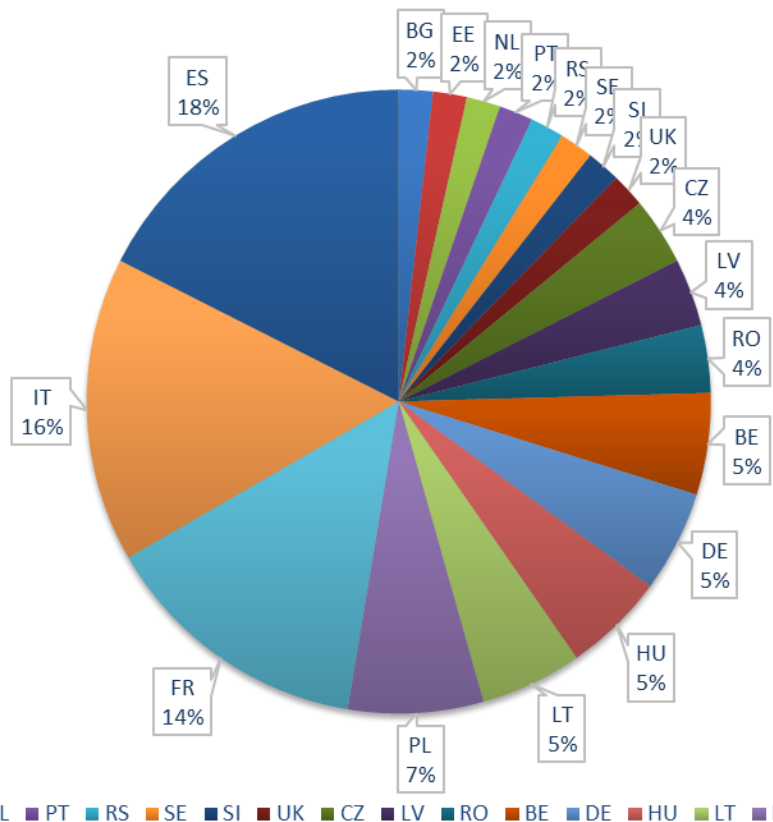


- France is Number 2 beneficiary of all Innosup-1 projects
- French partners make up 20 out of 149 partners across all the h2020 participating countries (13%)

INNOSUP-1 HORIZON 2020



ESCP-S3 projects – participation by country



- France is Number 3 beneficiary of all ESCP-S3 projects
- French partners make up 8 out of 57 partners across all the COSME participating countries (14%)

INNOSUP-1 - Beneficiary Partners from France

	Partner Name	Project Name	Status	Cluster
1	MOV'EO	Impact Connected Car	under implementation	Yes
2	Peugeot Citroen Automobiles SA	Impact Connected Car	under implementation	No
3	Fédération internationale de l'Automobile	Impact Connected Car	under implementation	No
4	Association Agropolis International	Inclusilver	under implementation	Yes
5	Aerospace Valley	NEPTUNE Cross4Health	under implementation under implementation	Yes
6	Toulon Var Technologies	NEPTUNE	under implementation	Yes
7	Agence de Développement et d'Innovation Aquitaine Limousin Poitou Charentes	NEPTUNE	under implementation	Yes
8	INNO TSD	NEPTUNE	under implementation	No
9	INNO TSD	IoT4Industry	Grant Agreement Preparation	No
10	Ecole Supérieure des technologies Industrielles Avancées	NEPTUNE	under implementation	No
11	INRA	SuperBIO	under implementation	No
12	Cap Digital	INNOLABS	under implementation	Yes
13	SYSTEM@TIC PARIS REGION	C-VOUCHER	Grant Agreement Preparation	Yes
14	BLUMORPHO SAS	C-VOUCHER	Grant Agreement Preparation	No
15	AGRI SUD OUEST INNOVATION	DIVA	Grant Agreement Preparation	Yes
16	DIGITALPLACE	DIVA	Grant Agreement Preparation	Yes
17	POLE SOLUTIONS COMMUNICANTES SECURISEES	IoT4Industry	Grant Agreement Preparation	Yes
18	ARVE INDUSTRIES HAUTE SAVOIE MONT BLANC	IoT4Industry	Grant Agreement Preparation	Yes

What's next?

European Cluster Excellence Programme

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

- **11 completed projects** (2.47 million, COSME 2014 and 2015 calls for proposals) gathered 57 cluster organisations representing 11,000 SMEs
- **10-12 new cluster partnerships to start around February 2020** (3.6 mio EUR, COSME 2018 call for proposals)
 - 1. Enhance cluster managers' **skills** (benchmarking, training, coaching and mentoring) 
 - 2. Support **cluster strategy** development (at cluster & partnership levels)
 - 3. Organise twinning, collaboration, networking/learning activities & joint **cooperation** projects
 - 4. Implement a **new „ClusterXchange"** pilot scheme (supporting short-term growth exploration visits with lump sums of up to 1100 EUR to third party cluster members) 
- **Potential new call for proposals (COSME 2020, subject to approval)**

The ClusterXchange pilot scheme

Short-term exchanges to foster strategic interregional collaboration :

- Identifying new partners & enhancing market access
- Supporting networking
- On-the-job training
- Sharing experiences
- Capacity-building activities



Who can benefit (starting later in 2020)?

- Cluster organisations (SME intermediaries)
- SMEs
- Scaling-up support organisations

(e.g. tech centres, research institutes, fab labs (digital) innovation hubs, creative hubs, resource-efficiency service providers, incubators, accelerators)

How is it implemented?

- Matching IT tool/support at



EUROPEAN
CLUSTER COLLABORATION
PLATFORM
.eu

- Implemented by cluster organisations of Cluster Partnerships (ESCP-4x)
- Small financial support to visiting organisations (lump sums of max. 1100 EUR)

Objective:

- Overall 500 exchanges of which
 - 50% involving SMEs
 - and at least
 - 25% other participants beyond direct beneficiaries

Linked action (COSME 2017 Ad Hoc Grant): European Cluster Excellence Initiative Phase II

Over 1000 cluster organisation have been benchmarked and labelled. Majority in 7 Member States.

1. Set clear **principles to increase Europeanisation** (i.e. transparency, EU-wide reach-out, fair pricing, cooperation options, data confidentiality & analysis, integrity of purpose and neutrality)
2. Review, simplify and consolidate **labelling criteria and process**
3. Build-up an **inclusive and sustainable management structure** for the labelling process



Feed-back from 450 participants

European Cluster Conference (14-16 May 2019)

European cluster conference with 450 participants 'connecting ecosystems'

Published on: 20/05/2019

The 6th edition of the European cluster conference took place during 14-16 May 2019 in the palace of Parliament in Bucharest, hosted by the Romanian Presidency of the Council of the EU. The event theme was 'Connecting ecosystems: bridge. inspire. change.'



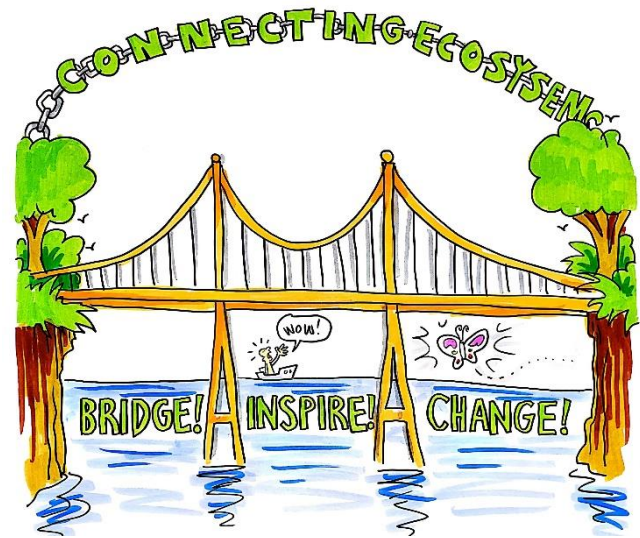
The conference was organised by the European Commission's Directorate General for Internal Market, Industry, Entrepreneurship and SMEs in cooperation with the Romanian Ministry of Economy. It gathered 450 national and regional cluster policy-makers and practitioners from industry, research and academia.

Conference site:

<https://www.eucluster2019.eu/en>

See the documents & picture section for video, graphic harvest, slides, poll results, student blog, pictures...

#EUCLUSTER2019





- **Matchmaking event** : *more than 360 meetings*



- **Policy discussions** with 6 Member States - *High-Level Policy Roundtable*

- **Panel discussions** on linkages between cluster-related EU initiatives with different services of the European Commission



- **3 break-out sessions** addressing key challenges

- **Changing economies**
 - ✓ Digitalisation and skills gap
- **Changing climate**
 - ✓ Circular Europe
- **Changing attitudes**
 - ✓ Shared value and social impact



Cluster Award ceremony for:

- **EU Cluster Manager 2019**
- **European Strategic Cluster Partnership for Smart Specialisation Investments (ESCP-S3)**
- **European Strategic Cluster Partnerships – Going International (ESCPs-4i)**
- **Innosup-1 partnership**

Social economy in clusters

- Locally anchored and resilient
- Reinvest profit in social impact
- Create social impact by doing business



- Main drivers for Social innovation
- Source of skilled and motivated staff



→ Shared value principle



→ Co-creators of competitive and sustainable values

Customised policy advice to 12 selected regions in industrial transition

Pilot regions in industrial transition receive customised policy advice to develop modern cluster policy

12 selected model demonstrator regions on modern cluster policy in support of industrial modernisation

Regions chosen as all being in the middle of an industrial modernisation process

*The aim is to **make the evidence available** and **provide the analysis and facilitate the discussions** that help you to improve further*

*Services offered include a regional survey and European Cluster Excellence Scoreboard benchmarking report; Provision of **regional policy briefing and regional assessment report**, Organisation of **policy review meetings** in the regions and a **joint peer review meeting***



Source:

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

Example 1 : Centre Val de Loire (1)

Centre-Val de Loire has been selected to receive tailored support under the Commission pilot action for industrial transition



Centre-Val de Loire will be able to develop or redesign a strategy for regional economic transformation based on its smart specialisation priorities i.e. its niche areas of competitive strengths



Environmental engineering and metrology for resource-intensive activities



Biotechnologies and applied solutions for health and cosmetics



Systems for energy storage



Technologies for energy efficiency for construction and building renovation



ICT and solutions for tourism

Region profile

GDP per head (2016):



€25.095

Unemployment rate (2016):



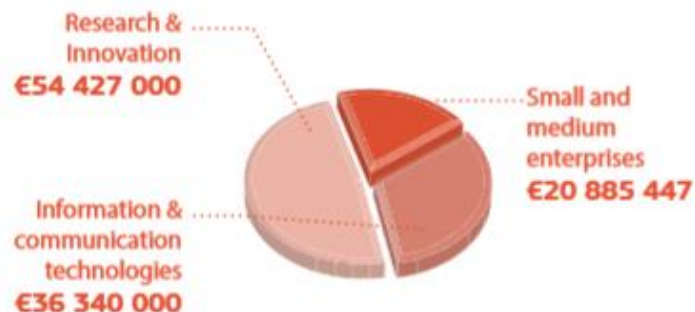
9.9%

Total change in industrial employment between 2000 & 2014:

-26%



ECONOMIC STRUCTURE IN EMPLOYMENT (2014)



ERDF AVAILABLE FOR CENTRE-VAL DE LOIRE

Example 1 : Centre Val de Loire (2)



Important industry sectors:

- Not strongly specialised, with no clearly dominant sector. Within industry, the key sectors are pharmaceuticals, rubber and plastics, machinery and equipment, electrical equipment, and metals (including machinery)⁶
- Regional exports concentrated in pharmaceuticals, perfumes and cosmetics and equipment machines

Innovation

- 1.65% of regional GDP dedicated to R&D in 2014.⁷
- The private sector funds a comparatively high share of R&D funding (3rd among French regions). However, private research is highly concentrated on specific sectors, notably pharmaceuticals,⁸ chemistry and automotive industries⁹.

Recommendations :

- to fully acknowledge the importance of component suppliers at regional level and in several cluster organizations, and propose adapted policy support
- to foster more inter-cluster activities to address common issues
- to explore the possibility of establishing a meta-cluster addressing suppliers' specificity.
- to provide support to existing cluster organizations so as to increase their potential role in fostering modernisation (digitalisation), entrepreneurship, internationalisation, and help them cope with need for skills of their members.

Example 2 : Hauts de France (1)

The industrial transition regions pilot action

Hauts-de-France has been selected to receive tailored support under the Commission pilot action for industrial transition



Hauts-de-France will be able to develop or redesign a strategy for regional economic transformation based on its smart specialisation priorities i.e. its niche areas of competitive strengths

- Transports
- Health
- Agriculture/agrifood
- Images
- Materials
- Energy

Region profile

GDP per head (2016):



€23.819

Unemployment rate (2016):



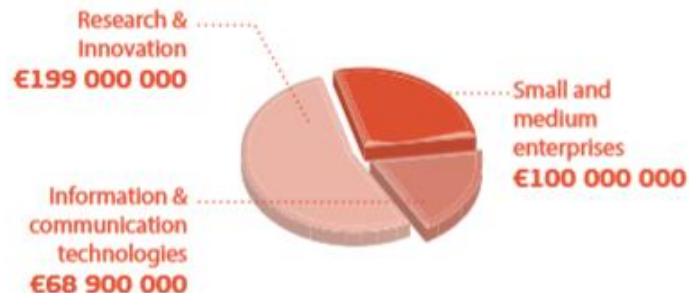
12.7%

Total change in industrial employment between 2000 & 2014:

-30%

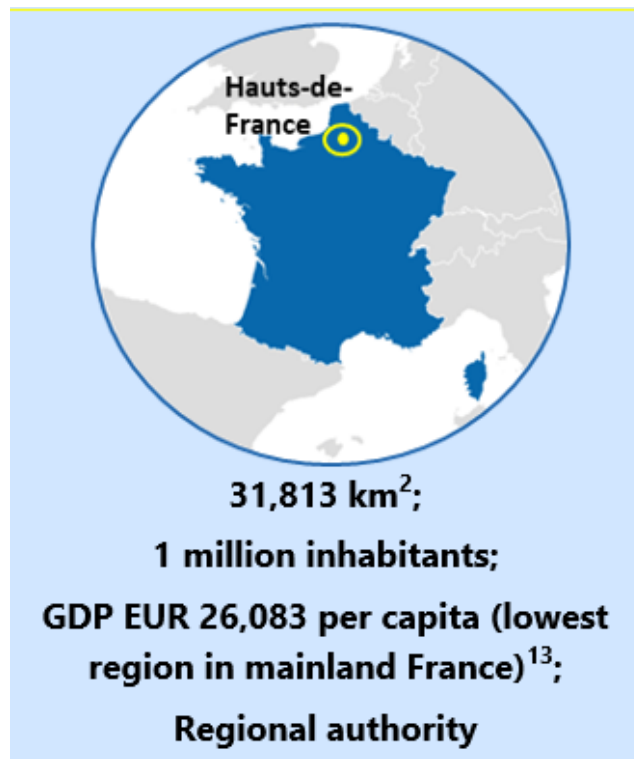


ECONOMIC STRUCTURE IN EMPLOYMENT (2014)



ERDF AVAILABLE FOR HAUTS-DE-FRANCE

Example 2 : Hauts de France (2)



Important industry sectors:

- Textile and mining sectors in Nord-Pas de Calais,¹⁴ agriculture in Picardie.¹⁵

Innovation:

- Private business R&D expenditure EUR 168.30 per capita;¹⁶
- Intramural R&D expenditure lower than national average across sectors;¹⁷
- High rate in enterprise creation due to high level of unemployment, but lower rate in innovative companies

Company structure:

- Local start-ups confronted by an up to 50% "stock discount effect": e.g. start-ups in Lille will only be able to raise half the funds from venture capitalists compared to Paris;¹⁸

Recommendations :

- to raise the level of competence of the workforce with less employable skills;
- to provide more internal coherence to the innovation eco-system;
- to recover a territorial identity and a form of balance after the shock of the merger of the two former regions.

Example 3 : Grand Est

The industrial transition regions pilot action

Grand-Est has been selected to receive tailored support under the Commission pilot action for industrial transition



Grand-Est will be able to develop or redesign a strategy for regional economic transformation based on its smart specialisation priorities i.e. its niche areas of competitive strengths

- Materials, processes, production technologies related to the industry of the future
- Agro-resources (bio-economy)
- Health (including biotechnologies, medical technologies, e-health, materials for health, silver economy)
- Sustainable building
- Sustainable mobility, intermodality, logistics and transport (including aeronautics and automobile)
- Water (actions for the sustainable improvement of water in all its forms)

Region profile

GDP per head (2016):



€25.207

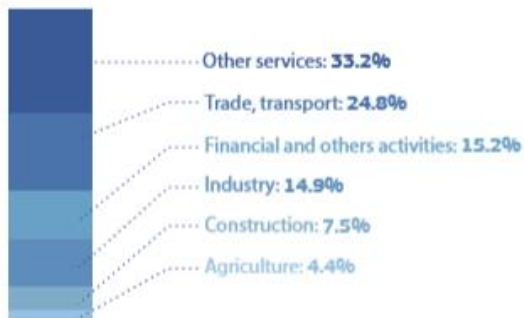
Unemployment rate (2016):



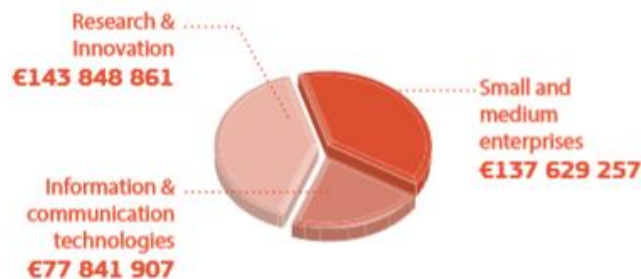
11.4%

Total change in industrial employment between 2000 & 2014:

-29%







ECONOMIC STRUCTURE IN EMPLOYMENT (2014)



ERDF AVAILABLE FOR GRAND EST

Overview of Recommendations for the 10 pilot regions

										
Support for cluster development	✓	✓			✓		✓	✓	✓	✓
Support for cluster activities		✓	✓		✓			✓		✓
Support for platforms, networks, incubators, test beds		✓				✓	✓	✓		
Promotion of cooperation					✓	✓				
Funding and advice for SMEs	✓	✓		✓				✓		✓
Funding for R&D and academia	✓			✓		✓			✓	✓
Funding for education/training		✓								✓

The most encountered types of support identified across the 10 pilot regions are :

- support for cluster development (seven regions)
- for cluster activities (five regions)
- funding and advice for SMEs (five regions)
- funding for R&D and academic (five regions).

Other measures are more region-specific, such as promotion of cooperation (in Lithuania and North-Middle Sweden) and funding for education and training (in Centre-Val de Loire and Wallonia).

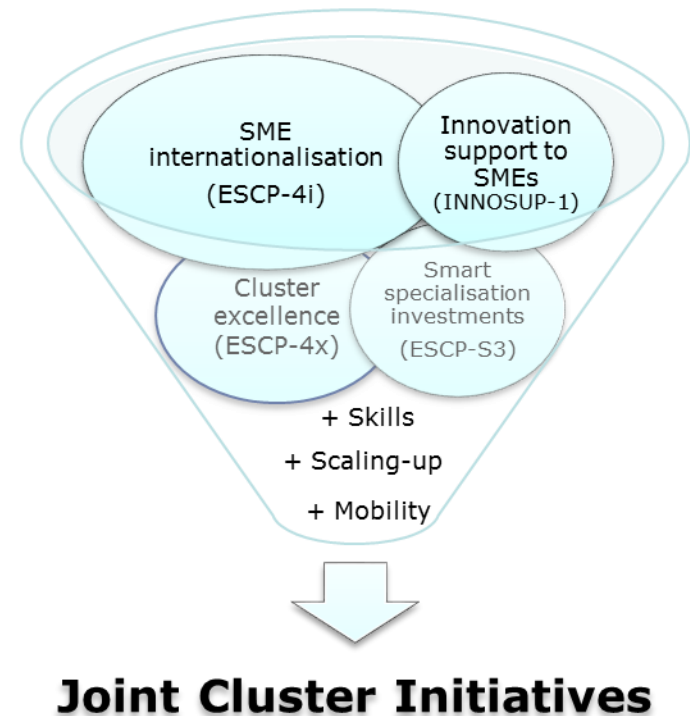
Towards Joint Cluster Initiatives

- Industry-focused actions guided by joint strategies of **specialised 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

Skills upgrading,
talent attraction &
entrepreneurship
acceleration

Boosting
internationalisation
& access to
global value chains



Joint Cluster Initiatives

creating linkages with other policies

- **Sustainable partnering** with continuation funding allowing long-term planning and engagement of industry and public authorities
- **Strategic tool for the acceleration and implementation of other policies**, notably for
 - smart specialisation strategies and Cohesion Policy investments,
 - (digital) innovation hubs,
 - Horizon Europe with the European Innovation Council etc.,
 - Erasmus,
 - Cities and Regions,
 - and others...
- **Scalable potential** to use SME intermediaries of Joint Cluster Initiatives and Enterprise Europe Network to implement further scaling-up support to SMEs

Scope for more ?

EU Superclusters

- *focusing on EU Strategic value chains*
- *moving towards a value-based economy*
- *creating more shared-value*
- *born European acting globally*

Commission expert group on Clusters

*Composed of representatives of the **Member States** (nominated) **and individual experts** (selected through a call for the expression of interest)*

Discussion

What are the main developments of the phase IV of the French national policy on poles of competitiveness?

What follow-up for the regions in industrial transition project ? How useful was it ?

How do you tackle the issues of retaining and attracting talents in your regional ecosystems ?

What are the main challenges in using European funds ?

What are the needs in terms of mobility between clusters in France and across Europe ?

What examples of initiatives promoting mobility across countries do you know of ?

What other challenges do you spot in your regions (skills of clusters or companies, sectoral approach...) ?

What do you expect from European level (capacity building, skills, co-financing rules, internationalization strategy, etc.) ?

Thank you

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

[@Clusters_EU](#)



Advanced Technologies, Clusters and Social Economy unit (GROW.F2)

Innovation and Advanced Manufacturing Directorate

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