### CLUSTERS – drivers of interregional value chains





# How to measure value chains? Clustero

UNIDO (2011)

The industrial cluster development approaches, which assume that spatial organization, strategic firm alliances, and networking are sources of systemic competitiveness. Their analytical focus is often on: a) how actors network to exchange goods, services, and information; b) institutional and political frameworks that promote building industrial clusters and the inclusion of small-tomedium-sized firms; and c) the level of knowledge and technology used.

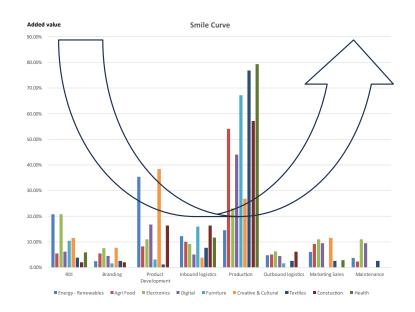
### Smile Curve & Density



#### **Density**

Density (%) =  $\frac{value_i}{Total \ Value} * 100$ .

#### **Smile Curve**



# Wood & Furniture (Danube Region) Clustero

Wood and furniture (No. of companies)	RDI	Branding	Prioduct Develop ment (Design)		Manufact uring	Outbund Logistics (Distribut ion)	Marketin g Sales	Service (Mainten ance)	Total
Austria	16	12	19	56	113	1	2	19	238
Hungary	8	0	29	15	30	25	10	5	122
Montenegro	0	0	2	2	5	0	1	. 0	10
Romania	5	1	8	13	75	5	4	6	117
Slovenia	14	0	0	0	61	0	0	0	75
Croatia	4	3	5	7	30	6	0	3	58
Total	47	16	63	93	314	37	17	33	620



## Mechanical Engineering (Danube Region) Clustero

Mechanical Engineering (No of companies)	RDI	Branding	Product Develop ment (Design)	Inbound Logistics (Suppliers )	Manufact uring	Outbound logistics (Distributi on)		Service (Mainten ance)	Total
Austria	6	0	14	28	53	5	0	9	115
Baden Wuerttemberg	50	50	100	350	400	30	50	25	1055
Hungary	10	0	0	0	24	4	5	24	67
Romania	32	7	20	0	26	1	25	22	133
Serbia	14	0	16	11	67	4	10	53	175
Slovenia	23	4	10	18	48	6	6	15	130
Total	135	61	160	407	618	50	96	148	1675



## Mechatronics (Danube Region) Clustero

Mechatronics (No. of companies)	RDI	Branding	Product Develop ment (Design)	A STATE OF THE PARTY OF THE PAR	Manufact uring	Outboun d logistics (Distribut ion)	Marketin g/Sales	Service (Mainten ance)	Total
Austria	52	0	105	62	115	20	0	70	424
Bavaria	7	0	15	2	28	2	3	4	61
Baden Wuerttemberg	3	15	30	30	147	30	15	30	300
Hungary	9	0	13	15	23	4	9	23	96
Slovenia	7	0	3	0	10	0	0	4	24
Total	78	15	166	109	323	56	27	131	905



## SORINTEX (MD)



			Product Developm					
			ent	Inbound	Productio	Outbound	Marketing	Service/Mai
SORINTEX	RDI	Branding	(Design)	Logistics	n	Logistics	/Sales	ntenance
No of enterprises	9.5	2 4.76	4.76	9.52	66.67	0.00	0.00	4.76
Turnover	16.6	7 4.17	1.67	8.33	66.67	0.00	0.00	2.50
Exports	10.0	0 3.50	0.75	0.00	85.00	0.00	0.00	0.75

## Lengthening the Value Chain: ASTRICO NE Clustero

ASTRICO NE is a silver labeled textile cluster specialised in producing different types of yarns and knitted garments, located in NE Romania. The leader of the group, RIFIL SA Savinesti, is the most important manufacturer of acrylic yarns in the EU.

In 2011, Astrico Nord-Est has developed a collaborative marketing-sales system by setting up a trading company, owned by the members of the cluster. Through this system, the group companies benefit from services such as: marketing, design, prototyping, technical assistance, logistic and financial services.

In 2013, ASTRICO NORD-EST founded its own facility of sampling and collection creation, with the assistance of the knitting machine manufacturer SHIMA –SEIKI. The capacity is equipped with the latest technologies on knitting industry (computer graphic design systems, newest generation of flat knitting machines, sewing machines, complete system for professional washing, drying and ironing).



### Conclusions



Strengths	Opportunities
High intensity of the foreign trade Complementarity of sectors in the Danube Region	Enhancing cooperation between Danube regions based on existing competences on specific parts of the value chain.  Digitalisation of production and marketing  Cross sectoral cooperation (e.g., wood and metal, plastics, textiles)
Weaknesses	Threats
East West technology divide  Few companies acting on branding and marketing along the analysed value chains  Digitalisation level of companies in the beginning	Migration of traditional clients towards completely new market niches (e.g., automotive to life science)  Competition from China based on costs.  Online suppliers disrupting traditional supply chains





Thank you!

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