Cluster policy landscapes and collaboration opportunities in the European Union and Canada

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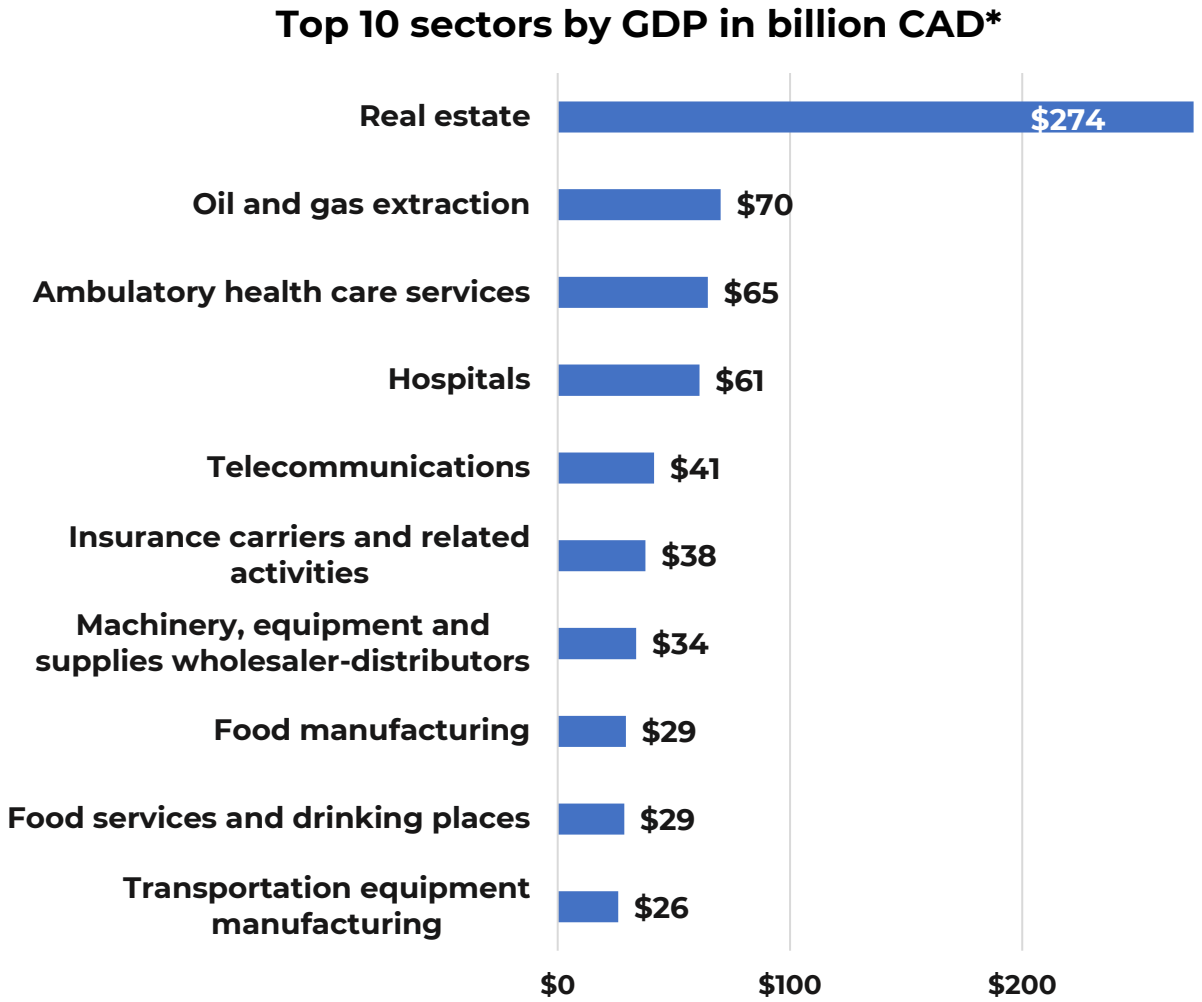
Economic profile of Canada

General characteristics of the economy:

- As of 2022, Canada's GDP amounted to EUR 2.1 trillion
- 9th largest economy in the world

Predominant sectors:

- Dominant service sector
- Manufacturing as well as Mining quarrying & oil and gas extraction, represent relevant shares of the Canadian economy
- High importance of raw materials, such as crude oil, for the Canadian economy



Source: ECCP (2024), own elaboration based on Statistics Canada, Gross domestic product (GDP) at constant prices (base year 2017). *excluding Public administration

Value chain analysis: 6 industrial ecosystems with most promising potential for further cooperation

Aerospace & Defence

- Aeroplanes among the most important imported commodities from Canada
- Many different “Defence”-related initiatives due to the Russian war against Ukraine

Agri-Food

- Food & live animals and beverages & tobacco accounted for a trading volume of around EUR 6.2 bn

Digital

- ICT services among the most relevant traded services
- Strong increases in traded services since the implementation of CETA in 2017

Renewable Energy

- Agreements on increasing trade in the areas of renewable energy, especially clean hydrogen

Health

- Medicaments, hormones, antisera/vaccines among the most traded commodities
- Currently ~EUR 3.8 bn worth of EU exports to Canada

Mobility-Transport-Automotive

- Machinery & transport equipment as the most important traded goods
- Motor vehicles for transport of people accounted for EUR 2.9 bn of EU exports to Canada

Canada's Global Innovation Clusters programme

Digital Supercluster	Scale AI	Canada's Ocean Supercluster	Protein Industries Canada	Next Generation Manufacturing
Digital technologies	Artificial intelligence	Ocean-based industries	Plant-based protein alternatives	Advanced manufacturing
$125 million (GIC) $173 million (ISI) $298 million (total)	$125 million (GIC) $230 million (ISI) $355 million (total)	$125 million (GIC) $153 million (ISI) $278 million (total)	$150 million (GIC) $173 million (ISI) $323 million (total)	$177 million (GIC) $250 million (ISI) $427 million (total)
Virtual, mixed, and augmented reality; data collection & analytics; quantum computing	AI & supply chain technology	Digital sensors & monitoring, autonomous marine vehicles, energy generation, marine biotech & engineering	Agri-food enabling technologies, incl. genomics, processing, and IT	IoT, machine learning, cybersecurity, additive manufacturing
Regional headquarters: British Columbia	Regional headquarters: Quebec	Regional headquarters: Atlantic Canada	Regional headquarters: Prairie provinces	Regional headquarters: Ontario

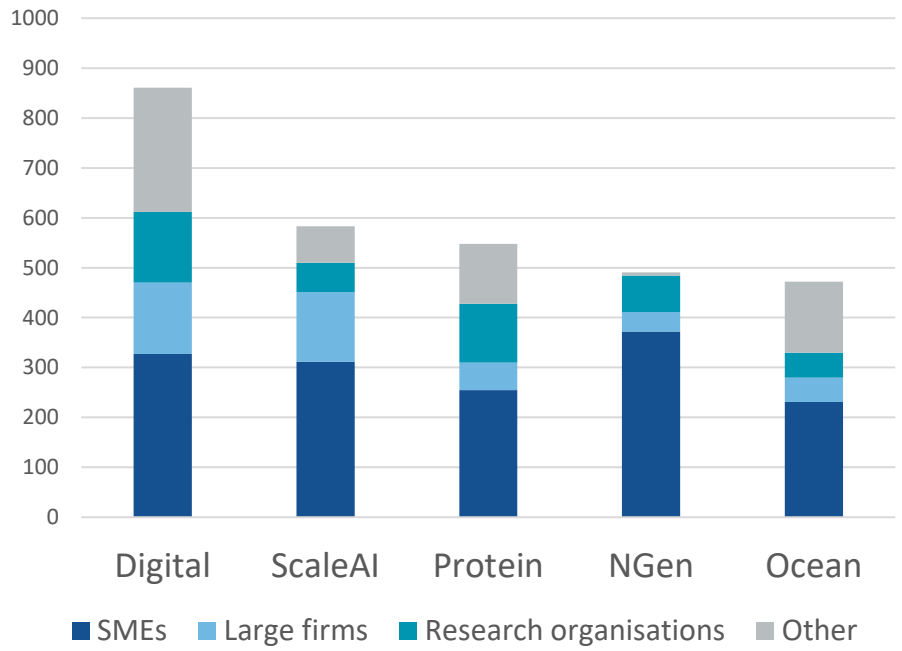
Source: Own elaboration based on ISED and Invest Canada data, as of 31.03.2023. Budget numbers are shown in Canadian dollars ($).

Canadian partnerships. Worldwide impacts.

- Est. 2017, recapitalised 2022
- **Goal**: Attract innovation activity, investment and talent
- **Five large clusters** with massive funding
- Clusters operate **cascade funding** with…
  - … a focus on **project consortia** and generating **private co-investment**…
  - … in **techno-industrial focus areas** where Canada is **internationally competitive**

The Canadian cluster landscape

Organisation types of partners



1500
SMEs

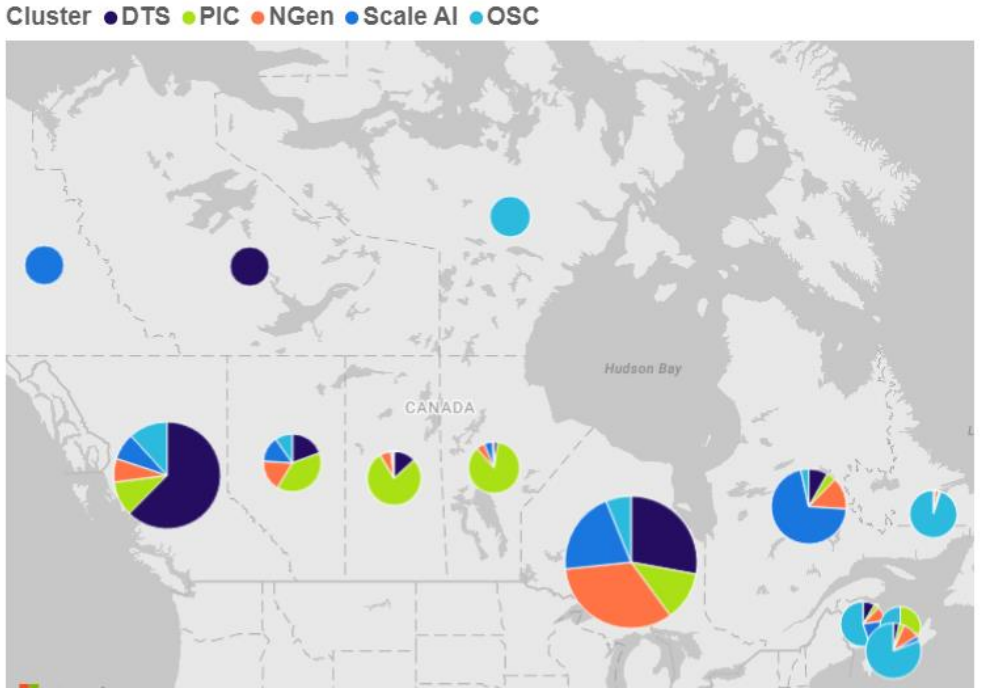
425
Large firms

440
Research organisations

590
Other partners

Source: Own elaboration based on ISED data, as of 30.06.2024.

Regional distribution of cluster partnerships



Source: ISED, as of 30.06.2024.

Note: Figures show GIC clusters. More clusters of different scale and sectors exist at the provincial level (e.g., within Quebec's Zones d'Innovation programme).

EU-Canadian cluster collaboration

Administrative Agreement on Cluster Collaboration

- **Signed 2019** between Canada and the EU
- **Goal**: promoting collaboration & exchange between cluster representatives, cluster members, and policy-makers

International cooperation with Global Innovation Clusters

International firms without a presence in Canada usually **can participate** in GIC-funded project consortia but **cannot receive funding** themselves for their own activities.

Canada joins Horizon Europe

Pillar II: Funding collaborative research projects on global challenges

- Overall **budget**: €52.4 billion
- Already **155 projects** with Canadian participation

Final Remarks

Economic profiles of the EU & Canada and key value chains

- Canada provides a highly diversified economy with constant economic growth & is a key trading partner for the EU
- Key value chains in EU-Canadian trade are linked to the Aerospace & Defence, Agri-food, Digital, Health, Mobility-Transport-Automotive, and Renewable Energy ecosystem.

Canada's GIC programme and cluster landscape

- Cluster programme on a national scale with global outlook
- Designed to foster industry-led public-private co-investment
- GIC clusters operate country-wide with distinct regional focus

EU-Canada cluster collaboration

- Increasing support for cluster collaboration between EU and Canada since 2019
- New support for research cooperation through Horizon Europe

Make sure to check out the Input Paper!

EUCLUSTERS MATCHMAKING EVENTS

THANK YOU