# Economic profile of Auvergne-Rhône-Alpes

General trends in the economy:

- Second-largest regional economy in France, with a **GDP of €290.9 billion** (representing 12% of France's total GDP).

- **GDP per capita (PPS) of €32,800** (EU average of €32,400), with substantial **regional disparities** between the region of Rhône-Alpes and the more rural region of Auvergne.
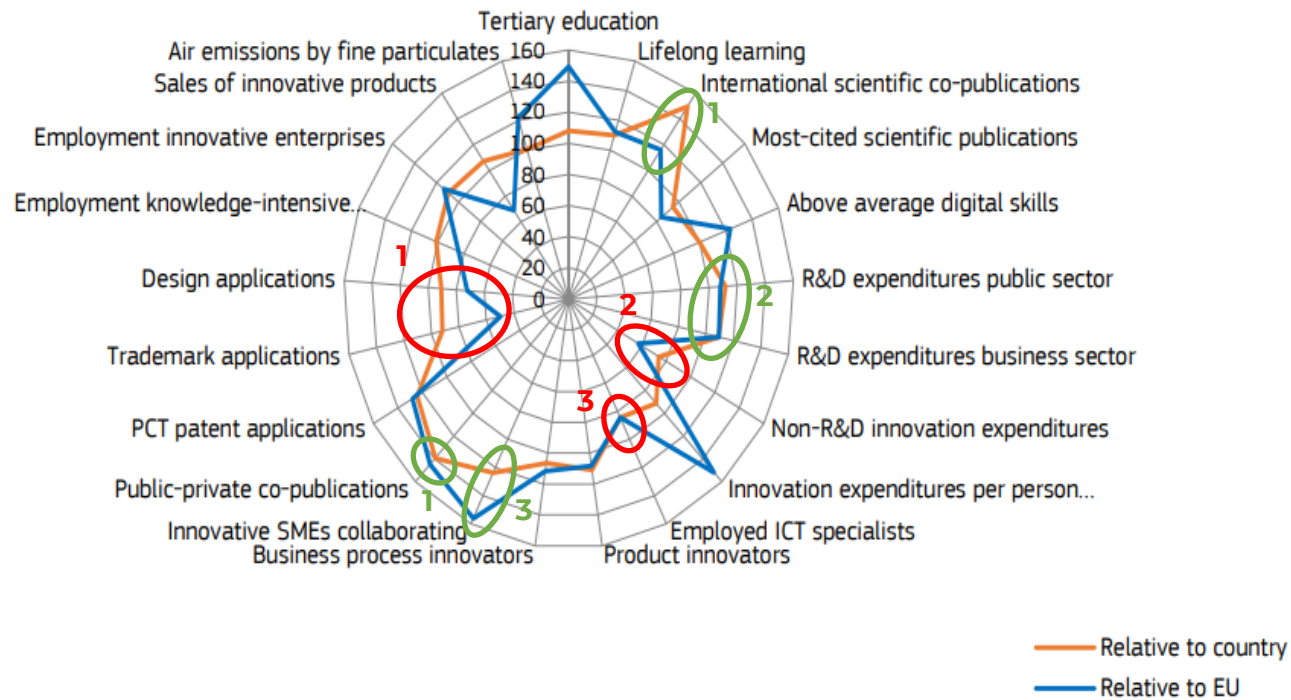
Sectoral composition:

- **The Services sector** makes up roughly two-thirds (64.5%), while the manufacturing sector comprises 14.8% of employment.

- The **Health ecosystem** comprises the largest employment share across all ecosystems (higher than the national and EU27 average).

- Also: High concentration relative to the EU27 in the ecosystems **Construction**, **Proximity**, **Social Economy** and **Civil Security** and **Mobility – Transport – Automotive**, showing diverse prospects in sectors for regional growth through clusters.
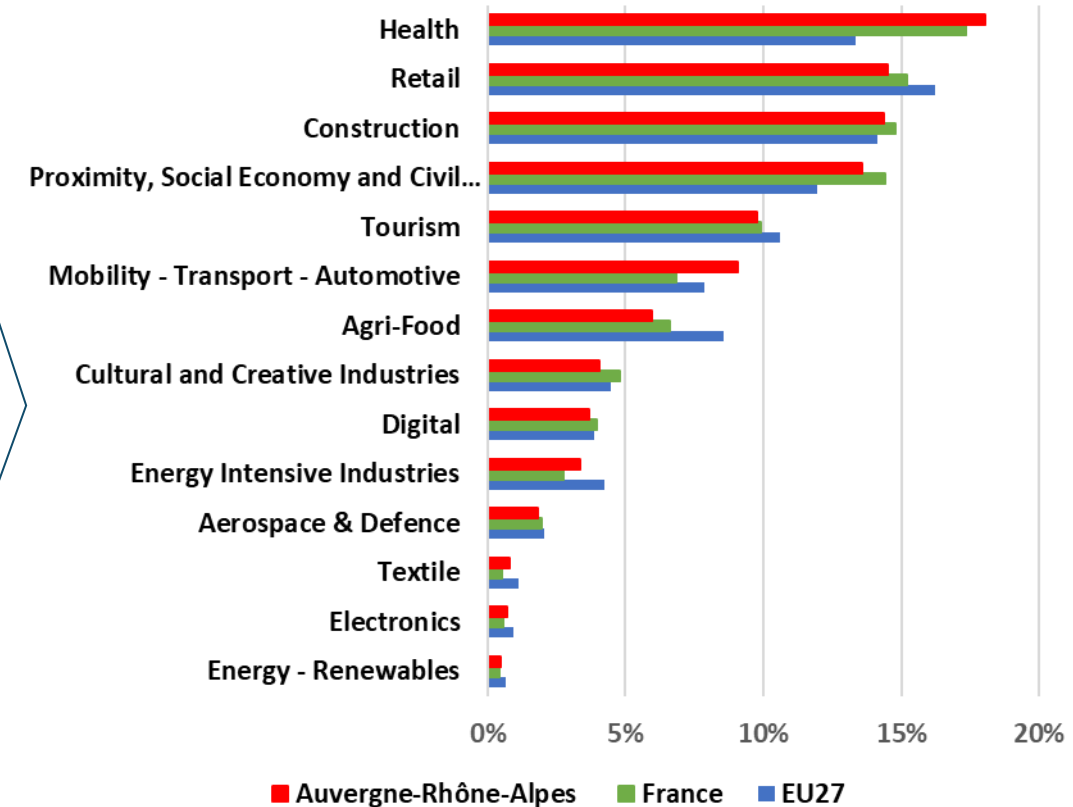
Source: ECCP (2023), own elaboration based on Eurostat.

Auvergne-Rhône-Alpes's innovation and regional competitiveness performance

RIS: FRK – Auvergne-Rhône-Alpes as a "Strong Innovator"

Strengths

1. International scientific co-publications & Public-private co-publications (relative to country and EU)

2. R&D expenditures in the public & business sector (relative to country and EU)

3. Innovative SMEs collaborating with others (relative to country and EU)
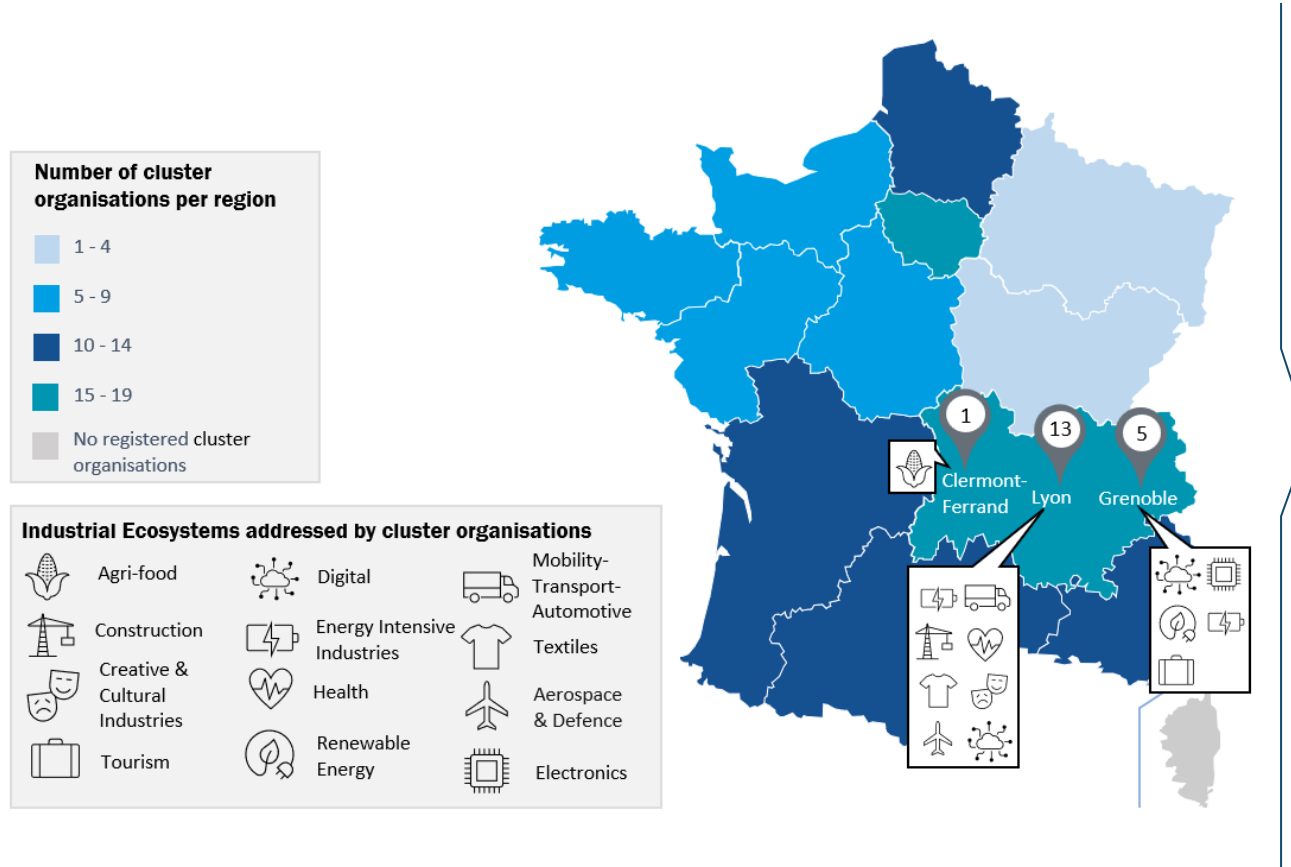
For future development:

1. Design patent applications & trademark applications (relative to country and EU average)

2. Non–R&D innovation expenditures (relative to country and EU average)

3. Employed ICT specialists (relative to country and EU average)

Regional Competitiveness Index 2022

- Rhônes-Alpes exhibits an overall score above the EU and country average, whereas the region of Auvergne falls below both benchmarks, underlining the disparities between both regions

- Rhône-Alpes demonstrates strength, particularly in business sophistication and innovation, while Auvergne shows room for enhancement in these areas.

Source: Regional Innovation Scoreboard 2023

Cluster organisations* in Auvergne-Rhône-Alpes: Locations, sectors and structures

Number of cluster organisations per region

- 1 - 4
- 5 - 9
- 10 - 14
- 15 - 19
- No registered cluster organisations

Industrial Ecosystems addressed by cluster organisations

- Agri-food
- Construction
- Creative & Cultural Industries
- Tourism
- Digital
- Energy Intensive Industries
- Health
- Renewable Energy
- Mobility-Transport-Automotive
- Textiles
- Aerospace & Defence
- Electronics

Clermont-Ferrand 1
Lyon 13
Grenoble 5

Cluster Organisations

- 19 Cluster Organisations (CO) registered on the ECCP from Auvergne-Rhône-Alpes – the highest number for all of France

- Covering 12 out of 14 EU Industrial Ecosystems

- Top: Agri-food, Construction, Renewable Energy, Health

Member Structure

- Generally strong membership with a good third of all COs under 200 members (37%; ØEU: 73%), another good third with 201-300 members (37%, ØEU: 7%), and the remaining quarter of COs with over 300 members (26%, ØEU: 10%).

- SMEs (69%; ØEU:71%) most prevalent followed by large companies (11%; ØEU: 10%) and the research sector (10%; ØEU: 8%).

- **Collaborative Areas:** Partnering for projects; internationalisation; exchanging with peers
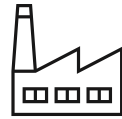
Importance of cluster organisations for regional economic competitiveness

Cluster organisations are **positively correlated** with a range of **economic competitiveness indicators**:

Business environment

+ Public R&D expenditure
+ Human resources in science & technology

Firm behaviour

++ Business R&D expenditure
+ Employed ICT specialists

Intermediate performance indicators

+ Apparent labour productivity
+ PCT patents per Capita
+ ICT patents
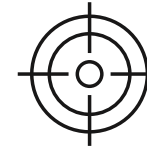
Outcome indicators

+ GDP per Capita
+ Employment in technology & knowledge intensive sectors
+ Share of ICT in GVA

However: The presence of regional industrial agglomerations is also linked with **higher air pollution**.

++ Positive correlation
+ Weak positive correlation

Source: Own elaboration based on ECCP Summary Report 2022

The European Commission offers important programmes for collaborative projects among clusters & their members

2014-2020 funding period

2021-2027 funding period

INNOSUP-1

- Horizon 2020 initiative
- Development of new-cross sectoral industrial value chains across the EU
- **3 clusters involved in three INNOSUP-1 projects (IoT4Industry, Amulet, S3Food)**

ESCP-4i

- COSME initiative
- Development and implementation of joint internationalisation strategies to support SME internationalisation
- **10 clusters involved in 16 ESCP-4i**

ESCP-4x

- COSME initiative
- Boost the cross-cluster networking and learning within the EU and development of cluster management excellence
- **5 clusters involved in 4 ESCP-4x projects (SmartSports4GoodLife, Smartenergy, Materialix, Brilliant)**

ESCP-S3

- COSME initiative
- Boost cluster cooperation in specific thematic areas in the field of regional smart specialisation strategies
- **2 clusters involved in 2 ESCP-S3 projects (Connsensys, S3martMed)**
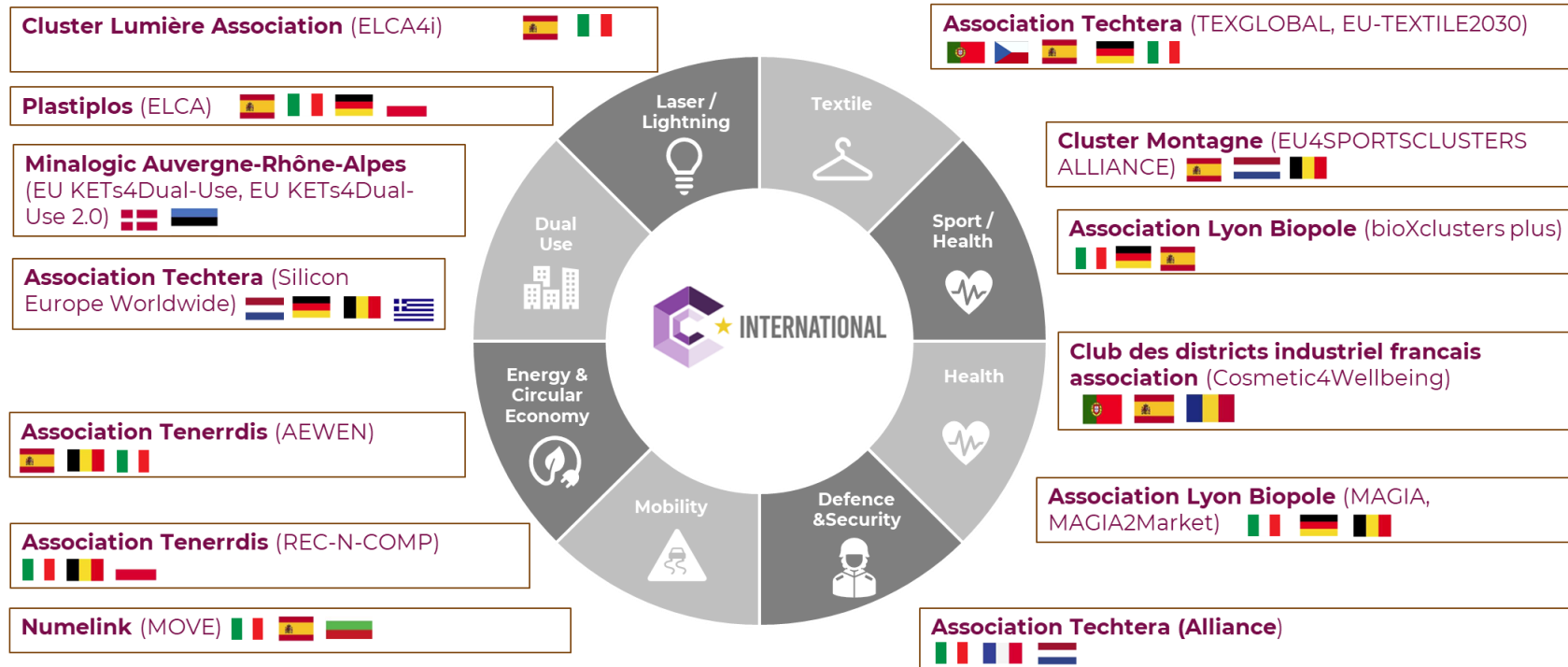
Eurocluster

- Single Market Programme
- Support the implementation of the EC industrial strategy through cross-sectoral, interdisciplinary and trans-European cluster initiatives
- **7 clusters involved in 7 Eurocluster (GEMSTONE, Silicon Eurocluster, FRIEND CCI, SILEO, POLREC, EuroBoosTEX, B-Resillient)**

Source: ECCP (2023)

10 clusters from Auvergne-Rhône-Alpes involved in ESCP-4i with European partners

Overview of the involvement in the ESCP-4i

Cluster Lumière Association (ELCA4i)

Plastiplos (ELCA)

Minalogic Auvergne-Rhône-Alpes (EU KETs4Dual-Use, EU KETs4Dual-Use 2.0)

Association Techtera (Silicon Europe Worldwide)

Association Tenerrdis (AEWEN)

Association Tenerrdis (REC-N-COMP)

Numelink (MOVE)

Association Techtera (TEXGLOBAL, EU-TEXTILE2030)

Cluster Montagne (EU4SPORTSCLUSTERS ALLIANCE)

Association Lyon Biopole (bioXclusters plus)

Club des districts industriel francais association (Cosmetic4Wellbeing)

Association Lyon Biopole (MAGIA, MAGIA2Market)

Association Techtera (Alliance)

C ★ INTERNATIONAL

- Laser / Lightning
- Textile
- Sport / Health
- Health
- Defence & Security
- Mobility
- Energy & Circular Economy
- Dual Use

- **16 project participations in the ESCP-4i** by 10 cluster organisations.

- **European cluster partners** came from 16 different countries.

- **Thematic focus:** textile, health care, mobility, energy, circular economy and lightning/laser.

- **Diverse target markets:** Australia, Canada, USA, China, Japan, South Korea and more.

Source: ECCP (2023) based on information from COSME data hub

Seven **cluster organisations from Auvergne-Rhône-Alpes** part of first Eurocluster call

Overview of the involvement in the Euroclusters

Innov'Alliance (B-Resilient)

Association Techtera (EuroBoosTEX)

Polymeris (POLREC)

Cluster Lumière Association (SILEO)

CIMES HUB (GEMSTONE)

Minalogic Auvergne-Rhône-Alpes (Silicon Eurocluster)

CDIF France clusters (FRIEND CCI)

Electronics   Agri-Food   Cross-sectoral incl. Creative Industries   Textile   Cross-sectoral
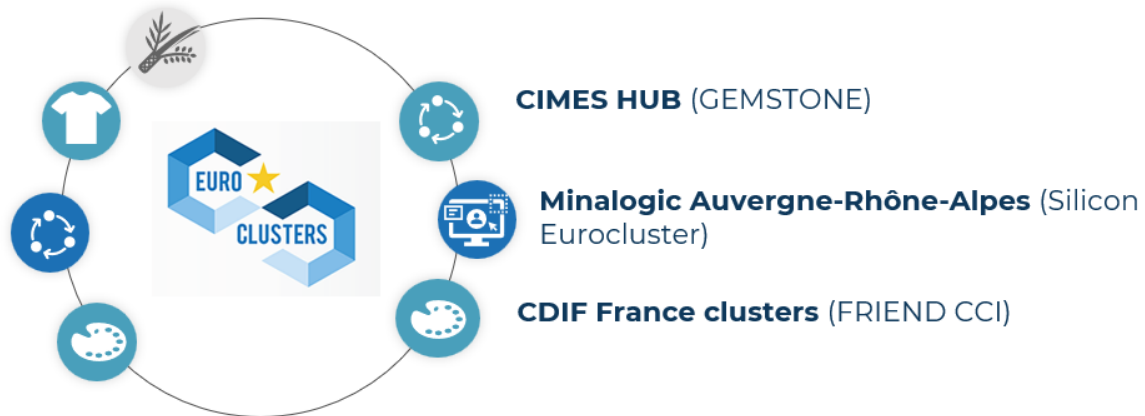
Source: ECCP (2023)

- The 7 cluster organisations involved in 7 different Euroclusters (out of 30 existing Euroclusters)

- **Thematic focus** on textile, creative industries, agri-food and electronics.

- **Cluster partners** come from 15 different MS

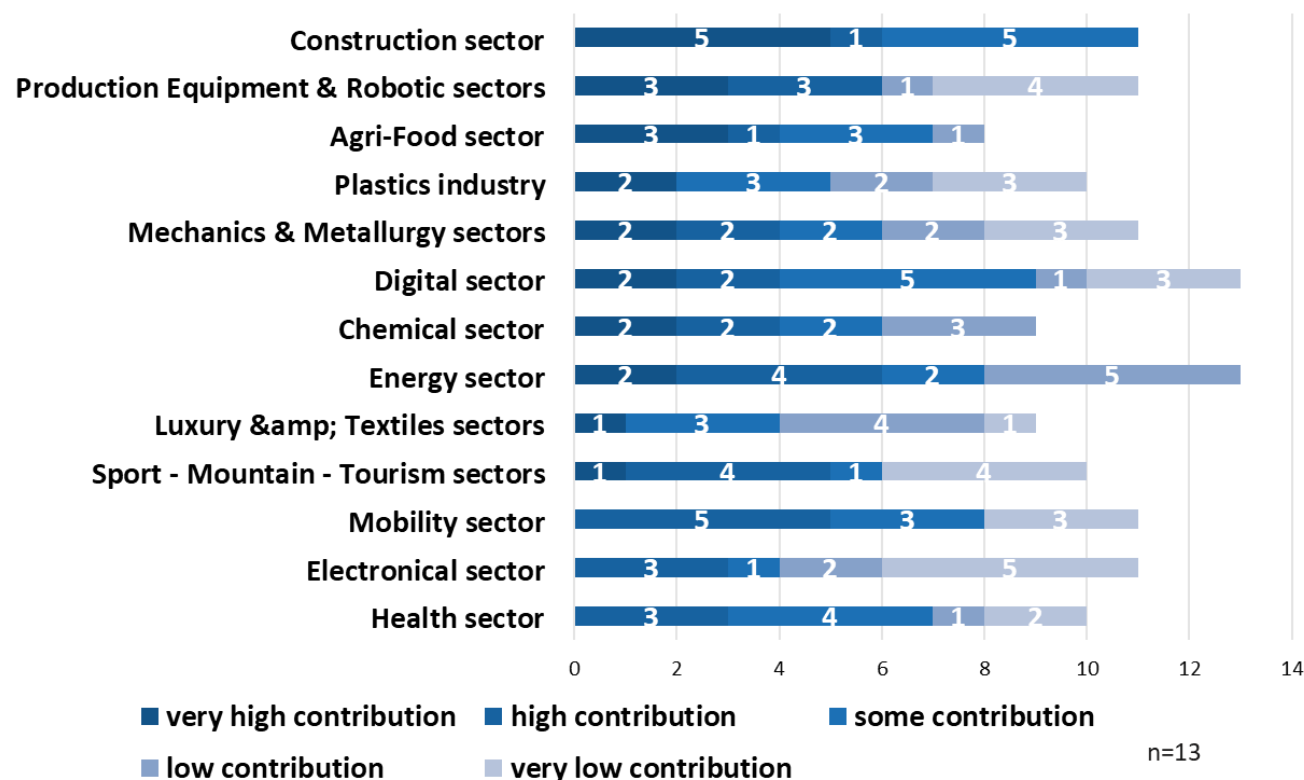# Priorities of the Auvergne-Rhône-Alpes S3 Strategy 2021-2027 & survey results

Agri-Food sector	Digital sector	Luxury & Textiles sectors
Energy sector	Construction sector	Chemical sector	Sport - Mountain - Tourism sectors
Mobility sector	Electronical sector	Health sector
Mechanics & Metallurgy sectors	Production Equipment & Robotic sectors	Plastics industry

Contribution of competencies of Auvergne-Rhône-Alpes cluster organisations to the priority areas

Sector	very high	high	some	low	very low
Construction sector	5	1	5		
Production Equipment & Robotic sectors	3	3	1	4	
Agri-Food sector	3	1	3	1	
Plastics industry	2	3	2	3	
Mechanics & Metallurgy sectors	2	2	2	3	
Digital sector	2	2	5	1	3
Chemical sector	2	2	2	3	
Energy sector	2	4	2	5	
Luxury & Textiles sectors	1	3	4	1	
Sport - Mountain - Tourism sectors	1	4	1	4	
Mobility sector	5	3	3		
Electronical sector	3	1	2	5	
Health sector	3	4	1	2	

(axis: 0 2 4 6 8 10 12 14)

■ very high contribution   ■ high contribution   ■ some contribution
■ low contribution   ■ very low contribution

n=13

Final Remarks

Economic profile

- Economic structure of Auvergne-Rhône-Alpes is characterized by a large services sector, with notable growth observed in recent years. Sectoral composition in the regional economy presents a diverse range of prospects in various sectors.
- According to the RIS 2023, Auvergne-Rhône-Alpes is classified as a strong innovator highlighting its strengths in research, science-driven development, and successful knowledge transfer to the private sector.

Cluster landscape

- Auvergne-Rhône-Alpes has the densest cluster landscape of all French regions with the highest number of cluster organisations and a far above average membership per cluster.
- Strong policy support for cluster development is provided by national and regional programmes as well as local initiatives.

Cross-border cooperation

- Cluster organisations from Auvergne-Rhône-Alpes were involved in cross-border projects (INNOSUP-1, ESCP-4i, ESCP-4x, ESCP-S3) in the 2014-2020 period.
- Cluster organisation from Auvergne-Rhône-Alpes are actively involved in 7 out of 30 Euroclusters (around 23% of all Euroclusters).

Smart Specialisation

- The Auvergne-Rhône-Alpes S3 2021-2027 identifies 13 priority areas that address a wide range of topics
- Cluster organisations in Auvergne-Rhône-Alpes contribute to all priority areas of the S3. The relevance of priority areas related to the Twin Transition stands out