ATclusters
european partners

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Analysis and benchmarking OF CLUSTER POLICY

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1 Introduction

1.1 The AT Clusters Project

The At-Clusters project is funded by the EU Territorial Cooperation Programme for the Atlantic Area, with partners from Brittany, South West Ireland ,Vale do Ave (North Portugal) and the three Spanish regions of Asturias, Cantabria and Galicia (Lead partner)

The Project commenced in mid 2009 and one of the first actions was to undertake an examination of existing levels of clusters and supports for the formation of clusters in each region, with a view to benchmarking cluster formation and towards putting the project on a footing from which it could to begin exploring possibilities or opportunities for cluster co-operation on an interregional basis.

This report summarises the findings of the initial research undertaken with outline summaries of the individual regional studies presented in the appendices. The full texts of the regional studies are available from the project website http://www.atcluster.org/.

The AT-Clusters project main objective is to **explore real possibilities of transnational cooperation among clusters in the Atlantic Area** (existing or proposed), and to connect them together in order to facilitate their development at EU and international level. Its target is to help clusters to become more dynamic and to support their development and exchange of best practices. The project is exploring the possibility of building up meta-clusters (clusters of clusters) able to bring together the most dynamic enterprises from the partner regions. The project intends to:

a) Improve the capacity of regional authorities in the identification and promotion of clusters.

b) Improve clusters capacity to offer efficient services to their members, and contribute thus to their development, modernization, innovation and internationalization.

c) Promote the cooperation among knowledge driven clusters in the Atlantic Area, to increase their competitiveness in the global market.

The aim of this "Analysis and Benchmarking Activity" is to achieve a better knowledge of cluster situation in the regions, **benchmark the cluster policies and to identify best practices** on cluster identification and promotion and finally to disseminate them. The analysis will provide the basis for future cluster co-operation.

1.2

The European framework: Policies and instruments to promote Cluster development and cooperation

The creation and development of industrial clusters has spread out as an **effective instrument to channel business co-operation initiatives towards innovation and internationalisation**. It has been widely proved and documented that geographical concentration of interconnected businesses, suppliers and associated institutions in particular fields increase the productivity of companies, in particular of SMEs, and therefore their national, European and global competitiveness. Within the former EU 15 countries and from the early 90s, most of the RDAs have promoted the creation of industrial clusters in their respective territory. "Innovation poles" or clusters are not easily built from scratch but strongly depend on pre-existing scientific and/or industrial strengths. The successful design and implementation of cluster policies therefore depends on a clear and thorough identification of the existing industrial and science base.

The role of clusters in EU innovation policy was highlighted by Commission Communication of 11 March 2003, **"Innovation policy: updating the Union's approach in the context of the Lisbon strategy"** stating that successful cooperation with other companies and the public authorities calls for the creation of "clusters", which are geographic concentrations of complementary, interdependent yet competing enterprises.

Furthermore, in its Communication to the 2005 Spring European Council on the Mid-Term Review of the Lisbon Strategy, the Commission underlines the importance of "innovation poles" for competitiveness and growth. Such **"innovation poles" or clusters**

bring together innovative enterprises with R&D and financing institutions, thus acting as a bridge between research and industry, usually at regional level. In this sense, clusters are defined as geographically proximate groups of interconnected companies, suppliers, service providers, and associated institutions in a particular field, linked by commonalities and complementarities. Clusters are often concentrated in a particular national region, and sometimes in a single town, but increasingly "clusters of clusters" across regional and even national borders are emerging.

Clusters are successfully operational at regional and national levels, and one of the European Commission policy lines is to promote transnational knowledge and innovation driven clusters.

More recently, the 7th Framework Programme is considering clusters as a key instrument in the Regions for Knowledge initiative, as suitable participants would be **'Consortia of Regional research driven clusters or a single research-driven cluster having multinational partnership'**. Research driven clusters are concentrations of research organisations (public research centres, universities, not-for-profit bodies), enterprises (large firms, SMEs), regional or local authorities (local government, regional development agencies) and where appropriate local entities such as chambers of commerce, savings banks and banks, operating in a particular scientific and technological domain or economic sector.

Over the last years, a number of initiatives and instruments have been launched to create an efficient environment for cluster development support in Europe.

PRO INNO Europe Initiative (**www.proinno-europe.eu**), launched in 2006, was one of the first initiatives to foster trans-national cooperation in the area of innovation policy development, including clusters, through the INNO-Nets. The first generation of INNO-Nets focused on cluster policy cooperation, support to knowledge-based SMEs and start-ups, transnational knowledge valorisation, the links of industry and research was well as innovation in services with the aim of stimulating transnational co-operation among different national or sub-national innovation programmes. The four INNO-Nets focusing on cluster policy cooperation formed the **European Cluster Alliance**, bringing together 88 cluster regions.

The European Cluster Alliance, created in September 2006, is an umbrella initiative built upon 4 on-going cluster policy INNO-Nets supported under the PRO INNO Europe initiative. Going a step further, the Alliance will be open from January 2008 onwards to any additional public organisation dealing with cluster policy development in Europe and willing to share experience and knowledge with the existing members of the Alliance. Its objective is to go beyond the identification of good cluster policies and to facilitate a true policy dialogue between those who wish to jointly advance the European cluster agenda in areas of common interest. This initiative responds to the needs and interests of many Member States and EU regions to share experience in the field of cluster policies and initiatives and to share resources to address problems faced by many. The aim is to develop better cluster policies, avoid duplication of efforts and reduce fragmentation of cluster initiatives in Europe. (**www.proinno-europe.eu**).

European initiatives: identifying future challenges for cluster policies in response to globalisation

Furthermore, in June 2007 was launched the ***European Cluster Observatory,*** (**www.clusterobservatory.eu**), a service created to inform policymakers, cluster practitioners and researchers and innovative enterprises about European clusters and national and regional policies and programmes related to innovation and clusters. The European Cluster Observatory provides a wide variety of data on regional clusters based on 38 cluster categories (agglomeration of employment in co-located industries) in 259 NUTS 2 regions (cluster mapping), with maps and lists of regional/local private-public partnerships focused on cluster improvements. The Observatory also offers reports on national and regional cluster policies and programmes case materials and various articles on clusters.

More recently, on 22 October 2008, the European Commission adopted a Decision on setting up a **European Cluster Policy Group** with the aim to explore how to better assist Member States in supporting the emergence of more world-class clusters in the EU. Its tasks will be to make recommendations on how to better design cluster policies in the Community, to assess international trends in cluster development and identify future challenges for cluster policies in response to globalisation, to explore tools for removing existing barriers to transnational cluster cooperation, and to analyse complementariness between the main Community level policies and financial instruments that support clusters.

Stronger transnational cooperation between clusters in true partnerships is seen as a promising approach to raise the international profile and to complement strengths of cluster. Cluster cooperation is enhanced at European level through the following measures:

- **The European Innovation Platform for Clusters (Cluster-IP) under Europe INNOVA** will facilitate transnational cooperation between cluster organisations at a practical level in view of developing and testing new or better innovation support tools for cluster firms. (**www.europe-innova.org**)

- **The European Cluster Excellence Initiative under PRO INNO Europe®** will develop Europe-wide quality standards for cluster management that may also facilitate the channelling of more innovation support through cluster organisations.

These EU initiatives in support of cluster cooperation together form a good basis for closer cluster cooperation at policy and practical level with the view to support cluster excellence at all levels and to facilitate the emergence of more world-class clusters in the European Union.

Stronger transnational cooperation between clusters is seen as a promising aproach to raise the international profile


2

2 Benchmarking conclusions

2.1

General assessment of cluster policy outcome

The aim of this section is to evaluate cluster policies performance to determine their effectiveness as tools for regional innovation development and by identifying the most successful ones to catalogue common features.

For most regions assessing the cluster policy outcome is a difficult task due to the fact that such policy is not fully formalized at regional level. In most regions there is not a clear definition of the rules applicable to company concentration or association to be called clusters, nor a minimum size or threshold in the number of member companies to qualify as a cluster. For example, in Galicia clusters range from 9 to 800 members and the key factor is not the number, but the relevance of their partners. Galicia can bring some experiences on dealing with large sector clusters and managing subsector interests, highlighting that integration is a key factor to manage large structures: the integration within the Automotive Cluster Foundation is almost 100% and it has been identified as key for the success of the abovementioned cluster. On the other hand the textile industry is grouped in different geographical areas in the region, so clustering initiatives are difficult to implement.

The lack of rules and absence of a formal framework for cluster generation could lead to the risk of the term clusters being used as a replacement for "business association". More debate is required on which networks or associations would benefit most from becoming clusters.

The cluster concept can be is consolidated around a number of features: only clusters carry out innovative projects and are devoted to increase innovation (while associations focus more on representing the global sector). Clusters aim to develop a long term relationship with scientific and research centres in order to increase productivity and innovation. Companies within a cluster have common objectives and complementary products and/or services. They work together for the implementation of a common strategy and they share the risks of such activity. Despite the different degree of development, clusters usually have a management structure independent from that of the member companies

Some regions have already identified some of their more successful clusters, such as the geographic presence of a number in pharmaceutical ICT, software and food companies in the South West region of Ireland and the automotive, wood, naval construction textile or energy in Galicia. In the North of Portugal region, clustering is focusing on industrial sectors, and it is mostly addressed to boost the modernisation of traditional sectors such as textiles, footwear, leather and furniture. What is very clear to all regions is the fact that **innovation plays an essential role within cluster configuration.**

Clusters likewise facilitate the promotion and development of economic sectors of strategic relevance for the regions, hence fostering increased innovation and added value. Cluster policy is therefore a relevant instrument to sustain industry and employment within a territory. In small regions the lack of critical mass has always been a key issue. Business cooperation is critical for most of the regions and it has formed the basis for all clustering activities and initiatives. However **most of the clusters have only been recently identified and there are no records yet relating to enhanced financial gains based on their performance.**

Another objective of the benchmarking exercise was to determine the policy objectives, in particular to assess the role of innovation within the cluster configuration, as well as identifying other key policy objectives in cluster promotion, such us competitiveness improvement, internationalization or training.

What is very clear from all regions involved in the project, based on their development policies, is the fact **that clusters are identified as tools to increase international competitiveness, to secure additional public funding and to foster innovation.** The initiatives are focused on strategic and applied research and high technology sectors, as in the Irish case or the interest within the industrial sector Galicia. The idea of forming supply chains with multinational companies linking in start-up companies is considered a key element to future clustering success. Nonetheless, some other aspects of clustering can be pursued and research, development and internationalization are identified by most of the regions. In addition, SWRA underlines the importance of achieving a balance between science push and market pull in ensuring that research activity is matched with market needs. IGAPE emphasizes that research and development depends on the sector, i.e. in some cases, such as automotive where R&D is most important, whereas in another cases such as the audiovisual sector, where networking is probably the key.

2.2

Major lessons learned during Regional Cluster development

The main objective of this section is identifying the major lessons learned during regional cluster development, to determine the main weaknesses and obstacles found. It identifies the main drivers of cluster development as well as providing a short critical assessment of the main successes and failures of cluster policies implemented at regional level. This evaluation includes a number of case studies with success stories that may encourage cluster development.

The main weaknesses can be summarised into three categories:

1) **Weak level of buy in from SMEs**: the companies frequently do not consider innovation and cooperation as tool of developing competitiveness and as a key to accessing new markets

2) **Shortage of qualified human resources**: it is necessary within firms to build a skills pipeline of graduates to support / retain existing business and attract new investors. This is a medium to long term challenge.

3) **Lack of focus on innovation and research activities** in some strategic sectors such as agro-food, renewable energy, software or health, which have significant clustering potential.

The assessment of the cluster policy at regional level reveals **that the main obstacles appear at the early stages of the cluster development.** These include failure to identify potential clusters, lack of critical mass (when only a few companies fulfil the requirements in terms of innovation, internationalization or management capabilities) and lack of financial resources.

There is a consensus **that the involvement of the public sector as a catalyst in developing clusters is important and provides a boost to cluster development.** The actions of the public sector can be delivered through various initiatives such us assisting companies to define and implement internationalization strategies or providing a good range of facilities in terms of dedicated incubators; technology and research centres or science parks. A step by step strategy has proved successful in some of the regions, in order to overcome impediments to company cooperation. Building a cluster around a common strategy for the internationalization of the member companies has been a successful approach in Cantabria, as this was accepted as a common objective.

All partners agree that the basis **of all these measures is that the benefits for the SME must be clear and strong. There is also general agreement that mature sectors present the best potential for success** in improving innovation capacities, launching collaborative projects and getting local recognition. For that reason the mature and integrated clusters can acts as catalyst or examples of best practice for other clusters which are still in their early stages of development.

2.3

Role of each partner category in cluster development (and impact to cluster success)

The information available in this section outlines the different models and roles played by the AT-Cluster partners to foster cluster development in their regions. Outlining inputs by SMEs as well as the Regional Development Agencies and research centres. A critical assessment of these roles will assist in formulating conclusions and identifying actions to further develop more effective cluster policy models.

The report addresses issue of effective institutional arrangements for cluster promotion, juxtaposing two modes: external cluster policies implemented top-down by regional authorities/development agencies and internal initiatives that are organized and financed bottom-up by groups of firms.

POLICY MODELS ON CLUSTER DEVELOPMENT		
TOP-DOWN POLICY	MIXTURE OF BOTH	BOTTON-UP POLICY
Galicia	Cantabria	
Asturias	Bretagne	
North Portugal	South West of Ireland	

As described in the above table, Galicia, Asturias and North Portugal follow a top-down approach, while Cantabria, Bretagne and SWRA have policy model with elements of both modes. While top down approaches to cluster formation are most prevalent, a strong role must also exist for internal initiatives within firms to build collaboration and cooperation through the development of clusters built on a bottom up basis.

In the Spanish partner regions cluster development is being mainly promoted and managed by the public sector organisations at a regional level. In the Portuguese case, clusters are a new concept promoted from the central government. In Ireland, up to recently, there appears to be no formal approach to cluster development in the South West region. Individual cluster type activities which are funded are more academic led in nature, with support from Enterprise Ireland.

In France, the “pôle de compétitivité” initiatives are mainly promoted by large companies or by research organizations, whereas “informal” clusters are more SMEs driven. In this case the role of the regional agencies is mainly in providing financial supports.

Internationally Public bodies are now playing an increasingly major role in cluster promotion, through a wide range of actions. Public partners are expected to act as an initial impetus for cluster development and to subsequently provide the cluster with advanced services in the fields of research, innovation, technology development, knowledge transfer, human capital, managerial skills, access to finance, etc.

Regional development agencies usually act as instigators of and provide support, expertise and funding for the start-up, implementation and development of clusters. In Cantabria, assistance and support provided by SODERCAN range from professional advice, sectoral studies and intermediation to strategy design, finance, management, and providing integrated support through all stages of the clustering process.

Regional development agencies usually act as clusters boosters, helping to identify the cluster needs and designing the guidelines. SWRA plays an umbrella role in bringing together a range of agencies with responsibility for SME development, and through the Regional Innovation Cluster coordinating the work of a wide range of educational institutions, development agencies and forms in the region. The Irish report reveals that the effectiveness of collaboration and networking is considered as being critical to bringing the various sectors and networks together with a common goal.

The involvement of public partners basically depends on the structure and development of the cluster itself. The support provided to the clusters may depend on the degree of cluster development, and this can change over time. Galicia, for instance, is directly promoting some clusters, while some other cluster initiatives would get support depending on their representativeness at regional level in terms of partnership and strategic plans. In more consolidated clusters, the public sector may become an ordinary member of the cluster with the same rights and responsibilities of any other member, as happened in the automotive clusters in Cantabria or Galicia. **Cluster management teams plays a key role in cluster development and success**, especially at the early stages of the cluster and due to the small size of most of the SMEs involved.

The experience of involving SME in the initial stages of cluster development differs considerably from some regions to others. In South West of Ireland and Galicia clusters mostly involves small companies. In Asturias the initiative rarely comes from SMEs and they only get involved if a major agent, normally a public one, leads the initiative. All clusters in Cantabria have started as a group of companies working together toward a common objective (joint purchasing centres, joint export units, joint research projects, etc). The interest, vision and involvement of industrial and business communities have been crucial for the development of the clusters.

Most of the regions consider that cooperation between clusters and research centres and universities is an important factor for cluster success. In Asturias, each of the clusters identified are related to some research centre and the research centres take the role played by the development agencies during the initial stages. In all regions the majority of the research centres are public or semi public institutions and have a close relationship with the Universities. **However, clusters can also work effectively without a direct support of a technology centre,** and not every successful cluster has such research centre support. In Brittany most of the territorial clusters are company led initiatives, with only indirect connections with specific research centres, and the “pôles de compétitivité” are linked to a broad number of such centres, but maintaining a separate structure.

In Ireland the vision for the European Research Area forms the backbone for the development of the Regional Innovation Cluster in the South West. A number of key features are anticipated such as adequate flow of researchers, world class infrastructure with integrated networking and accessibility, public-private cooperation, knowledge sharing with industry, well coordinated programmes and wide access to the European Research Area.

2.4

Cluster excellence

When assessing the cluster policies at regional, **AT-Cluster partners have identified a number of indicators to gauge cluster success:**

a) Number of companies involved and their representativeness

b) Level of involvement of cluster members in a cluster as well as the value they derive from their membership,

c) The relationship with research centres and universities

d) The number of innovative projects carried out

France and Spain's Governments have developed a specific labelling of clusters. In France, following the call for "pôles de compétitivité" initiatives issued in 2005, over 70 top-class clusters have been designated. In Spain, the Ministry of Industry is awarding a qualification of "excellent" to the strategic planning of some clusters which are meeting some special conditions, as an incentive to extend innovation in industry. This qualification enables clusters to benefit additionally from support programmes provided by the Ministry of Industry. This qualification has been awarded to a number of clusters in the Spanish partner regions.

At this stage only one cluster in the partner area has applied to be considered as a "research-driven cluster", as defined by the European Commission. This was recently formed by the SWRA as a Regional Innovation Cluster or RIC, based on the triple helix model with the participation of regional universities, research centres, enterprises, with regional and other public authorities supporting their cooperation. However, there are a number of clusters in the partner regions that are meeting the conditions to be considered as "research-driven" and "world-class". That is the case, for instance, of the ceramic cluster in Galicia that could comply with some of the characteristics of a research driven cluster. Cantabria automotive cluster (GIRA) brings together the main automotive component manufacturers located in the region, the research centres and the most relevant institutions and therefore meets the conditions to be considered as a "research-driven" and "world-class" cluster.

2.5

Starting point to collaborate

AT-Clusters have identified **two main lines for cooperation:**

• **Strengthen collaboration with R&D centres and universities**

• **International cooperation** to exchange experiences in terms of organization, management, R&D and collaborative projects. The project's main objective is to explore real possibilities of transnational cooperation among clusters in the Atlantic Area (existing or under clusters in formation0) and connecting them together in order to facilitate their development at EU and international level. Its target is to help clusters to become more dynamic and to support their development and exchange of best practices. The project shall explore the possibility of building up meta-clusters (clusters of clusters) able to bring together the most dynamic enterprises from several regions.

In order to achieve the main objective, **partners are seeking a double approach to cooperation.**

a) The Spanish regions are focused on a **general framework of cooperation**. The clusters are interested in entering into contact and cooperating with regional clusters either in their sector or in other European regions. The benefits expected include: learning about the way other cluster work, sharing views and experiences about their products markets, exploring areas of common interest for cooperation in R&D and innovation projects. More particularly, the method of identification of sectors, the areas of cooperation in other regions, the type of projects developed and the financing mechanisms and sources.

b) Other regions, like Bretagne and South West of Ireland, are seeking a more particular **cooperation at project level.** I.e. Bretagne: Image and Network has launched cooperation with Vindeira (Galicia) and would like to reinforce its actions with AT CLUSTER help. The Competitive Pole would like to apply for a European call "PROGRESS" and has targeted CITAG (Galicia) as potential partner.

AT-Clusters have identified two main lines for cooperation: 1. Strengthen collaboration with R&D centres and universities 2. International cooperation to exchange experiences

There are already cooperation initiatives being developed. Galicia and North Portugal are both involved in a transnational cluster in fashion and textile sector. The cluster creation is based on the real link between the textile sector in Galicia and North Portugal. However this is a recent initiative and it would be necessary to wait to see its further development.

On the other hand, the exchange of experience on cluster policy and development has given the opportunity of knowing in more detail the different policy approaches regions have taken. Some of the issues which have attracted the interest of the partners regarding other partner activities are:

- Method of identification/selection of sectors for the promotion of clusters by public authorities
- Type of cooperation projects that are or have been implemented by the different clusters
- Financial instruments and sources available for the development of a clustering policy
- Potential fields for cooperation with local clusters.

3 Benchmarking Summary

3.1

South West Ireland

Due to the size of the country, national cluster policy encompasses regional clustering. Much of the cluster activity in the South West is either more network or support type activity or emergent and in its infancy and therefore too early to be measured in any significant or rigorous manner. National cluster policy is mainly focused on research networks between Higher education Institutions and groups of firms. Regional R&D centres are in some cases key nodes of national clusters (Bio-Pharmacy, Chemical Cluster, Network Embedded Systems Cluster, and Photonics Cluster). Other local centres are actively participating in other national programmes and networks.

The most relevant individual cluster initiatives are:

1) **Cork Electronics Industry Association** represents over 50 ICT companies in the Cork area of the Region, the majority of which are large and multinational companies. The main activities aim at promoting institutional representation, business networking and some training actions. Few activities focus on research or on industrial issues.

2) **IT@ Cork:** association of professionals on the ICT sector. It aims at organizing sector events to facilitate networking and professional development and training.

3) **Fuschia Brands Ltd (West Cork Leader Cooperative Society Ltd.)**: Territorial cluster grouping local product manufacturers (food, crafts) and tourism service providers. Its main working areas are quality improvement, marketing and promotion (branding). West Cork Leader acts as catalyst.

4) **Kerry Technology Park (Shannon Development)**: This specific initiative of a Technology Park provides location and additional services to companies located there. The main impact has been to generate a locally driven cluster of IT and Software in a predominately rural area.

5) **Skillnets**: It is an enterprise-led support body dedicated to the promotion and facilitation of learning as a key element in sustaining Ireland national competitiveness. It supports over 150 networks of enterprises, 11 of them operate in the South West Region.

6) **Rubicon Centre (Cork Institute of Technology)**: Technology and knowledge based business incubator.

3.2

Bretagne

There are two approaches on cluster policies. One approach is where Regional government supports operating structures, called “Pôles de compétitivité” and branded as singular projects. Alternatively, other types of informal clusters exist, with a range of soft supports access to other support schemes. The aim of the latter clusters scheme is to promote the emergence of clusters and the development of “filières” (branches) that can undertake a clustering process.

The “Pôles de compétitivité” main features are: Sector (industry) focus, formal structures and meeting specific criteria set at national level and driven by globalization. They are part of a national strategy to create “national champion areas” and are backed with a strong national supports, getting funding from different public sources. They are considered and branded as singular projects. Regional government supports managing structures and R&D projects.

They gather a large number of associated members in each cluster. (105,179,264 and 196, irrespectively), with a high number of singular projects (108 financed). Although there are not much on the other more informal clusters however it can be noted that cluster policy has increased networking and business co-operation and is one of the main tools for regional R&D policy focused on industry sectors.

The individual clusters under the Pôles de compétitivité scheme are:

1) **Automobile Haut de Gamme (ID4Car)**: High grade cars. It is a very specific cluster focused on innovation and individualization.

2) **Pôle Images et Réseaux:** ICT and Internet of the future. Large cross regional cluster (Bretagne and Pays de la Loire), focused on specific topics for innovation policy.

3) **Pôle Mer Bretagne**: Strong regional cluster with a broad range of activities connected with the sea. It has a strong research basis with 44 research centres.

4) **Pôle de Compétitivité Valorial (the food of the future)**. Wide agro-food cluster including all food processing sub-sectors. It works by thematic commissions. Research centres play a key role on providing contents and bringing the work forward

Founded in 2005 responding to the national call, all of them are Pôles are structured as not for profit organizations and they carry out an active external co-operation policy.

So **called "Business clusters" or "local productive systems"**, present a less formalized structure since in most of the cases are generally geographic and organized around a market rather than around a product. They emerge from businesses which are grouped together for specific purposes (research, training, group purchasing etc.). Regional Government supports market oriented clusters linked to local resources and traditions, to foster diversification and to develop other industrial sectors. These kinds of clusters are individualized and led by ad-hoc strategies (identification of potential and interest, initial assessment, feasibility). The idea is to evolve towards Pôles de compétitivité in the future.

The main initiatives under "Other clusters" (Specific clusters with geographical and / or sector focus) are the following:

1) **Cluster Optique Lannion**: Locally based cluster in optoelectronics sector with a 20 year track record, but no formalized organization. It is led by France Telecomm with a strong technology base with 22 SMEs. It has international relations with an optical cluster from Quebec.

2) **RFID Bretagne Développement**: It is composed of 6 companies and 2 R&D centres. Application of RFID to different sectors.

3) **A l'ouest des dents**: it is a sector association, born in 2001, with approximately 70 members.

4) **ITS (Intelligent Transport Systems) Bretagne**: It is a public – private association to develop different initiatives in passenger and good transportation.

5) **Eurolarge**: Set up in 2005, it is formed by 70 companies linked to the boat racing sector.

6) **Cluster West**: Structured as a company is composed of 52 firms and 24 R&D organizations from the value chain in the agro food industry. It failed to become a "pôle de competitivité".

7) **Breizpack**: Established in 2001 and focused on innovation in packaging industry is formed by 36 companies and a research centre.

3.3

Vale do Ave

(North Portugal)

The development of clusters, since mid 2000 is a key part of national policy in Portugal. Strategic documents at the national and regional levels identify the important role at regional level to promote cluster development National Planning has set up the concept of Competitiveness and Technology Centres (CTC), or Competitive Poles, and the Strategies for Collective Efficiency (SCE) models (called “other clusters”). There is no cluster configuration at sub regional level (Vale do Ave), although there are a number of knowledge and technology centres in the area, which are key part of regional clusters.

In 2008, a national call for cluster initiatives was issued and applications are currently being evaluated. Potential beneficiaries in the North Region are:

1) **CTC**: Innovation driven networks in internationally competitive sectors: health, fashion, agro-food, forestry industries, automotive and productive technologies.

2) **Other clusters,** characterized by concentration of companies in neighbourhood areas: creative industries, wine, furniture and sea; also renewable energies and ICT, emerging at national level.

Only the Health Cluster has been formally established. Other “on-going” clusters are in agro-food, fashion and creative industries with a number of studies and seminars organized to configure and strengthen them. Some clustering initiatives have been promoted by specific entities, such as: Agro-food, by an association of companies and organizations, including R&D organizations (Integralar) or Fashion, by an institution specialized on innovation and technological development of textiles and clothing (CITEVE).

The cluster international activity has been weak up to the present times, although it is a priority action line. A number of reports claim a comprehensive methodology for cluster identification, promotion and development, particularly in traditional industries.

The main issues and objectives pursued by Cluster policy in the North region are:

a) Modernization of traditional industries;

b) Strengthen Innovation and R&D base: knowledge and technology centres are key part of regional clusters. Research and other support centres considered as critical partners for a successful cluster;

c) Competitiveness of traditional industries and development of emerging sectors; innovation;

d) Internationalization;

e) Workforce training.

The Individual cluster objectives are related to their specific profile. The most relevant individual cluster initiatives are:

1) **Health Cluster**. Operational since 2008, it is a national cluster with strong partner presence in North of Portugal. It was promoted by research organizations; it is now formed by 88 companies and organizations. Its main activities are the development, research, production and commerce of services and products related to the health sector.

2) **Creative Industries Cluster**. It is organized around a number of North of Portugal cultural institutions and local authorities. It aims at boosting cultural creation, improving cultural infrastructure and economic development by encouraging networking and cooperation.

3) **Agro-food Cluster**. It is a relevant sector with serious competitiveness problems. The cluster focuses on innovation and internationalization of Portuguese food companies. For that, the cluster established an observatory of sector main trends and proposes a Internationalization Capabilities Scoring to help companies to internationalize. It is formed by 70 partners (companies, universities and other entities) and it will be consolidated using some of the national support schemes

4) **Fashion Cluster**. Operational since 2008, although cooperation within the textile sector started back in the 1980's. It is promoted and integrated by the main business associations of the fashion sectors to enhance Portuguese fashion industry. Its main action lines are internationalization, innovation, qualification and modernization of the fashion sectors, mainly through business cooperation. The cluster is implementing cross border cooperation with Galicia, by means of EuroClustex.

3.4

Asturias

IDEPA, the Regional Development Agency of Asturias took the decision of promoting a number of clusters, based on the analysis of the regional economic and industrial structure. The aim of the clustering is providing governments with a better perspective of their territory economic reality as well as:

a) A better understanding of the industry needs and a means of direct dialog with the cluster firms

b) A new way to create awareness of existing support programs to firms and associations in the industry

c) Designing tailor made support for industry, involving private sector in their financing and management

d) Coordination within different Government departments to support industry

Cluster policies are supported by a two tier scheme:

a) National cluster support scheme: Grants for cluster identification and strategic planning and to support on-going expenditure and specific innovation projects. Companies belonging to top-ranked clusters have special access to other support schemes (R&D, innovation investment, among others). Methodologies for cluster identification are quite open.

b) Regional cluster support scheme: Grants for cluster identification and strategic planning and to support on-going expenditure and specific innovation projects. Eligibility depends on the formal establishment of the cluster. Priority is given to the 8 identified sectors.

In 2002 there was an initial selection of 4 clusters, but there are 8 clusters now. The main relevant individual clusters in Asturias are the following:

1) **Forest and wood industries cluster**: it is an emerging cluster with 30 companies supported by several technology centres and involving all the value chain agents.

2) **Manufacturias**: Multisectorial Cluster originated from a similar project of the European and Spanish Manufacture Technology Platform. The Cluster was established in 2008 and is composed of 27 companies and a Technology Centre (Prodintec).

3) **ClusterTIC**: ICT sector cluster, with a wide coverage of regional ICT sector (72 companies and around 3,000 employees). Operational since 2003, it has a wide co-operation networking and links with ICT Technology centres.

4) **Carnicastur**: Meat processing industry cluster organized around a privately promoted technology centre. Having research and innovation as its main focus, it also provides technical service to its 70 member companies.

5) **ITC-AIE**: It is a privately promoted and managed cluster with 16 metal manufacturing firms led by a large company providing commercial, technical and financial support. It has a close cooperation relationship with Manufacturias Cluster. In addition, the leading Manufacturias Technology Centre is also involved in this cluster.

6) **Energy**: Recently created cluster composed of 25 companies. Its main field of activity is the development of new technologies within energy efficiency and renewable energy sources sector. In particular eolic onshore and offshore, solar, biomass, biogas and ocean energy.

7) **AEI Contract**: is made up of 25 leading companies in their fields. All of them made up of gifted professionals capable of offering and developing creative and innovative solutions for hospitality, health care, civic cultural, banks, corporate, commercial. From the initial project phase, development, installation and maintenance, AEICONTRACT offers multiple and diverse solutions that are distinguished by their innovativeness in the CONTRACT market.

8) **Tourism**: The Asturias Tourism Innovation Cluster has been promoted by a group of leading tourism companies: 10 companies managing 15 and plus tourism facilities and services. It has focused its activities under the following goals: new markets, tourism services, tourism resources and training.

3.5

Cantabria

Cantabria is a small region and the lack of critical mass has always been an issue. Business cooperation is critical for this region and this has been the seed for all clustering activities and initiatives.

Despite the fact that no cluster policy as such has been launched in Cantabria, the initiatives carried out by SODERCAN (Regional Development Agency) in terms of identification, support and promotion of clustering activities have proved successful.

Up to date those initiatives have contributed to the raising of seven (7) regional clusters, although with different dimensions, different structures and different degrees of development.

Common features among the clusters in Cantabria:

- Established as a result of a SODERCAN initiative, which currently leads the process
- Innovation and internationalization are common objectives
- Management structure independent from that of the member companies

Clustering policies or initiatives have been launched very recently in Cantabria (2005), but some lessons can be learned.

One of the weaknesses has been the lack of technology agents specialized in innovation and research activities related to some sectors with a clear clustering potential (food industry, textiles, renewable energies…).

Building a cluster as per the Porter definition is not an easy task so sometimes there is to go step by step. In this sense building a cluster around a common strategy for the internationalization of the member companies has been a successful approach in Cantabria, as this has been the seed in most of the existing clusters. Most of the regional clusters have started as a group of companies working together toward a common objective (joint purchasing centers, joint export units, joint research projects, etc).

As previously said, SODERCAN, the Regional Development Agency, is currently leading the clustering and cooperation initiatives in Cantabria, but there is to highlight the role of the industrial and business communities, whose interest, vision and involvement have been crucial for the development of the clusters.

The individual clusters in Cantabria are:

1) **GIRA**: Operational since 2005, it is a strong cluster in the automotive industry integrated by 24 companies, 1 Technology Centre, the University, the Regional Administration, the Businessmen Confederation and 2 Trade Unions. It renders a wide range of services to member companies: research, training, marketing, etc.

2) **TRANSFORMAR**: Created in 2007, it operates in the fish processing industry and is integrated by 10 companies. Strategy is focused in addressing common needs and problems such as energy efficiency, waste management, joint commercialization and technological innovation.

3) **METCOEX:** Operational since 2006, it integrates 5 companies of the metal processing industry covering foundry, machining, welding, etc.

4) **SERVIBO**: Integrating 3 ornamental plant nurseries, it is operative since 2008.

5) **FIVE:** Four small companies working together in the field of fashion design.

6) **CGC (CLUSTER GEOMATICO DE CANTABRIA)**: A new cooperation project around companies dealing with geographical information systems.

7) **RENEWABLE ENERGIES**: This is a new clustering initiative arising out of the Regional Plan for Renewable Energy. Focused on wind and marine energies, the project is promoted from the regional administration and integrates technology centres, universities, research institutes and private companies.

3.6

Galicia

Regional cluster policy initiated back in 1994 (Intersectorial Competitiveness Plan), with some clusters having been established shortly afterwards. Although there have been changes on regional government structures have not affected cluster development.

Support to clusters is given through horizontal schemes (internationalization) but there might be specific agreements with each cluster, to provide additional support on specific projects (industrial, innovation) or on running costs.

Clustering is supported by a two-tier model: National and Regional.

a) National cluster scheme reinforces the originally regionally led initiative. General policy background to improve competitiveness and promote companies to grow through cooperation.

b) Regional policy is using existing support schemes, although it also develops specific instruments such as: collaboration agreements between the Regional Department of Innovation and Industry and Galician Industrial Clusters, and support to cooperative projects submitted by clusters. In terms of capital, regional investment in cluster policy has reached 9 million euro.

At the moment, there are 9 operational clusters and 2 in consolidation, involving 450 companies and 52.000 employees, which accounts for 40% of regional GDP.

The individual clusters in Galicia are the following:

1) **Automobile industry cluster (CEAGA)**: Operational since 1997 it is linked to PSA Peugeot Citroën and auxiliary industries and it involves 80 companies. The main priority is to increase closer cooperation between carmaker and component manufacturer: integral development of products and processes, specific training centre and improvement of company competitiveness by implementing Lean Production System. It has a strong research and innovation base: 27 in-company research departments and one specific Research Centre (CTAG).

2) **Sustainable energy and environment (ENERMAS)**: Created in 2007 around the regional waste management public-private partnership (SOGAMA), to improve business competitiveness through the whole value chain in energy and environment. It aims at promoting business dialogue and cooperation for research, human resources, internationalization and regulation. ENERMAS is composed of 27 members.

3) **Wood Cluster (CMA)**: Operational since 1999 it involves 64 companies from all wood processing sub-sectors and auxiliary industries (11.500 employees representing 77% of the regional wood sector). It has a close relationship with CIS-MADEIRA (Services and Innovation Wood Centre), as R&D&I Centre, and with other research and co-operation initiatives (technology platforms, research initiatives).

4) **Naval Sector Cluster (ACLUNAGA)**: Operational since 1999 with 141 companies in ship construction, transformation, equipment, repair and scrapping. Sector technology centres: Technology Platform for Naval Sector in Galicia and Technology Centre for Naval Industry in Galicia. Its main focus relies on industrial issues: auxiliary industry, cost reduction, environmental protection.

5) **Biotechnology Cluster (CBG)**: Created in 2006 and boosted by sector companies. It assembles 37 member companies. The main focus is knowledge and research: the clusters have promoted the creation of the Biotechnology Platform to co-ordinate and improve R&D activities and raise international profile. Some of projects include the creation of a Biotechnology Research Centre.

There are 9 operational clusters and 2 in consolidation, involving 450 companies and 52.000 employees

6) **Ceramic Cluster (AFICEGA)**: It was created in 1990 through an agreement between the University of Santiago and the Galician Ceramic Institute, a research partnership between the University and the private sector. It gathers 12 member companies.

7) **Audiovisual Cluster (CLAG)**: Promoted in 2003 by a group of companies who wanted to turn Galicia into a reference region for the audiovisual industry. Industry representation, promotion, and market access are the key working areas. It also focuses on common use of services and equipment, and increasing competitiveness and quality. R&D activities are channelled through I+dea, Galician Audiovisual Technology Platform.

8) **Graphic Product and Book Cluster (CPGLg)**: In its initial stages and involves 56 member companies. The feasibility plan has highlighted 4 key areas: innovation, training, internationalization and competitiveness. A Technology Platform is being structured and a Technology Innovation Centre for Graphic Product and Book to support R&D projects has been proposed.

9) **Aquaculture Cluster**: Established in 2001, it gathers 11 member companies. It is built around the Aquaculture Technology Centre,

although they have different objectives. The main working areas for the cluster are training, market information, quality control, research. Galician Aquaculture Technology Platform (PTXGA) was established in 2006.

10) **ICT Cluster**: Formally established in 2009, it is strongly connected to a Technology Centre and to the regional ICT Technology Platform.

11) **Fashion Cluster Galicia-North of Portugal (Euroclustex)**: Cross-border cluster (as also mentioned in Vale do Ave benchmarking report). Galicia is the main Spanish textile exporting region, developing a well know textile design and marketing brands.

There are a number of relevant sectors in Galician economy in which clustering processes have been attempted, but with limited success so far:

1) **Ornamental Stones Cluster**: Attempted but not successfully consolidated, due to companies' reluctance. The Sector Technology Centre was not enough powerful to support a cluster.

2) **Thermal Cluster**: Thermal water uses, mainly for tourism purposes. It is an emerging cluster, not yet consolidated, but based on strong resource base.

3) **Logistics Cluster**: Relevant sector, not really a cluster. Galician Logistic Technology Platform to become the catalyst of the cluster.

4) **Agro-Food Cluster**: Although it is a relevant sector for Galicia economy the cluster is not formalized. Galician Agro-food Technology Platform works as a meeting point for the sector with a large number of technology centres.

5) **Construction Cluster**: It is a heterogeneous sector, mainly base on the Technology Innovation Centre for Building and Civil Engineering developing research activities.

6) **Aeronautical Cluster**: The Aeronautical Consortium is an emerging cluster, which main weakness is the lack of critical mass. Companies are mostly coming from diversification of other industries.

7) **Nautical Cluster**: Derivation of the Naval Sector Cluster, focusing on sport and recreational navigation.

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