



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Assessment of European Cluster Capacity Building Needs

Analytical Report

Written by the European Cluster Collaboration Platform
March 2021

An initiative of the European Union





EUROPEAN COMMISSION

European Innovation Council and Small and Medium-sized Enterprises Executive Agency (EISMEA)

Department I. Innovation ecosystems, SMP/Entrepreneurship & Consumers

Unit I.02 – SMP/COSME Pillar

Sector I.02.3 – Entrepreneurship and Clusters

Contact: Valentino Izzo

Email: EISMEA-COSME-ECCP@ec.europa.eu

European Commission

B-1049 Brussels



LEGAL NOTICE

This document has been prepared for the European Commission however it reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

More information on the European Union is available on the Internet (<http://www.europa.eu>).

Luxembourg: Publications Office of the European Union, 2021

PDF ISBN 978-92-9460-575-7 doi: 10.2826/13494 EA-02-21-479-EN-N

© European Union, 2021

The Commission's reuse policy is implemented by Commission Decision 2011/833/EU of 12 December 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39, <https://eur-lex.europa.eu/eli/dec/2011/833/oj>).

Unless otherwise noted, the reuse of this document is authorised under the Creative Commons Attribution 4.0 International (CC BY 4.0) licence (<https://creativecommons.org/licenses/by/4.0/>). This means that reuse is allowed, provided appropriate credit is given and any changes are indicated.



Contents

Summary.....	6
Introduction.....	7
Structure of the report.....	7
ECCP Capacity-Building Needs Survey.....	7
1 Developments and challenges.....	9
Key developments in 2020.....	9
The key challenges and opportunities for clusters in 2021.....	10
The key strategic priorities of clusters in 2021.....	12
Key plans for developing clusters in 2021.....	13
2 Capacity-building needs.....	15
Needs of cluster organisations.....	15
Needs of cluster management.....	16
3 Capacity-building webinars: content and concept.....	18
Topics for future webinars.....	18
Format of future webinars.....	20
4 Conclusions: Roadmap to the capacity-building needs in 2021.....	23
Annex – Frequency tables.....	27

Analytical Report



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



Summary

This report was produced by the European Cluster Collaboration Platform (ECCP)¹ to provide a topical overview of the **capacity-building needs of European clusters² and cluster managers**, considering their key challenges and priorities for 2021.³ The report presents the evidence basis to design tailored capacity-building actions of the ECCP. It thereby builds on experiences and evidence collected on capacity-building activities in 2020, a dedicated Needs Survey among European cluster staff and additional supporting materials.

In 2020, the environment in which clusters operated changed fundamentally. In February 2020, the Economic Outlook of the European Union predicted a slow, yet steady economic growth driven by demand. However, COVID-19 and the consequent health crisis presented unparalleled societal and economic challenges for European clusters, causing new service needs of cluster members as well as a drastic acceleration of pre-existing trends such as digitalisation.

Intended as an easy-to-read report for policymakers and the cluster community, this report reflects on the implications of last year's developments for clusters and reveals new insights on the main challenges, priorities and capacity-building needs of clusters in 2021:

- In the wake of the ongoing health and economic crisis, the **main challenges** for clusters in 2021 include resilience and recovery strategies, along with internal development of the cluster and financing sources.
- The **strategic priorities** for clusters in 2021 are digitalisation, internationalisation, and the continued green transition.
- To address the challenges and unfold the full potential of strategic priorities in 2021 there is a **need for continued capacity-building** for cluster organisations and cluster managers. Improving cluster business models, developing and integrating new services, and managing stakeholders are highlighted as the most important needs.

The analysis confirms that the capacity-building webinars organised by the ECCP in 2020 were topical and useful opportunities for clusters to learn from their peers and get new insights. Building thereon, the **thematic focus** of the cluster capacity-building webinars in 2021 must reflect the needs and strategic priorities of clusters and their managers identified in this report. Therefore, the next webinars will focus on cluster business model development, ecosystem engagement, green transition and internationalisation.

Based on direct feedback, the **format** of the practice-oriented webinars and **follow-up actions** will be further tailored to the expectations of the community.

¹ The ECCP is implemented by a consortium of Ecorys, Orkestra, SPI and VVA. This report was drafted by Ecorys.

² According to a common definition, clusters are regional ecosystems of related industries and competences featuring a broad array of inter-industry interdependencies. For more information on the definition of clusters, visit the ECCP website: <https://clustercollaboration.eu/cluster-definitions>.

³ The main source is a European Needs Survey that collected 120 responses from the European cluster community in November and December 2020.



Introduction

This report provides a topical overview of the capacity-building needs of European clusters and cluster managers and considers their key challenges and priorities for 2021. Intended as an easy-to-read report for policymakers and the cluster community, its main source is a Needs Survey that collected feedback from clusters in December 2020. The analysis was enriched with feedback collected on capacity building actions conducted in 2020 (namely, four webinars on the industrial cluster response to COVID-19, effective communication, digitalisation of cluster activities, and the role of clusters in recovery strategies) and other supporting materials such as feedback surveys from participants in the webinars, input from the 2020 Clusters Conference and research papers from cluster experts.

Structure of the report

The first chapter of this report offers an overview of the developments and challenges for clusters in 2020 and 2021 and looks at their strategic priorities and plans for development. Then, the capacity-building needs are explored, distinguishing between the needs of cluster organisations and those of cluster managers (Chapter 2). The following Chapter 3 analyses the most popular topics for capacity-building webinars as well as the preferred formats and resources for their successful implementation. Finally, this report concludes with a roadmap for the capacity-building webinars in 2021 (Chapter 4).

ECCP Capacity-Building Needs Survey

The best source of information to assess the learning needs is the cluster community itself. The report therefore draws on the results of a dedicated Needs Survey, which collected the views of cluster managers as key target group, but also of the wider cluster community, including cluster members and policymakers. Running in November and December 2020, the survey gathered 120 responses from across Europe (83% of the responses came directly from cluster organisations).

Most respondents belong to experienced clusters, over 50% of them established more than a decade ago. They have smaller secretariats (with less than ten employees) and more than 50 cluster members each. These numbers indicate active cluster management teams and rather mature cluster organisations that need to adjust their offer and activities to the evolving reality. Still, their responses confirm that there is room for capacity-building. New and developing clusters are less represented in the sample. Yet the results of the survey and the analysis in this report are important for this group as well – if anything, younger and less established clusters and their cluster managers are more in need of support and experience sharing than their more mature peers.

The analysis in this report builds on our insights from the community, considering feedback from the Needs Survey and other relevant sources of input. Apart from analytical documents recently published by cluster experts, this report has incorporated feedback from participants in the four ECCP capacity-building webinars organised in 2020 as well as suggestions from the EC to the ECCP team and our exchanges with the community.



You should read this report if ...

... **you are a European cluster manager!** You can learn about your peers, understand what challenges are driving the cluster community in 2021, and reflect on your own and your cluster's situation to understand what your challenges and needs are.

... **you are a European policymaker!** You can get an overview of the strategic priorities and challenges of a large number of clusters from across Europe and gain ideas how these could link back to cluster policy.

... **you are a cluster expert!** You can find the most popular topics for development of clusters in 2021.

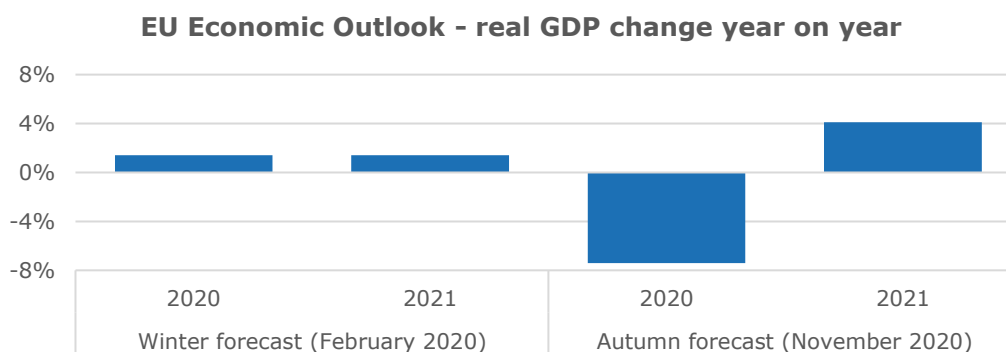


1 Developments and challenges

Key developments in 2020

In 2020, the environment in which clusters operated changed fundamentally. In February 2020, the Economic Outlook of the European Union predicted a slow, yet steady economic growth driven by demand.⁴ However, COVID-19 and the consequent health crisis presented unparalleled societal and economic challenges. Within weeks, countries across the Union went into lockdown. Governments imposed social distancing rules that helped to curb the numbers of infections, prevented the collapse of national health systems, and saved the lives of many. At the same time, these measures came at great costs to the economies, with real GDP estimated to shrink by 7.4% in 2020.⁵ Production and value chains, international and even EU-internal travel were disrupted, creating uncertainties for millions of businesses across virtually all sectors of the economy.

Following a sluggish economic recovery in the summer of 2020, many countries face the challenges of a second, even larger wave of COVID-19 infections. This new wave brought several health systems to their limits. The renewed lockdowns that followed will continue to shape the first half of 2021. Vaccines have been developed at unprecedented speed – heavily subsidised by public funding. Their approval and the rollout of ambitious vaccination campaigns nurture the hope that economies will grow in 2021 and that societies can re-open again.



Source: ECCP based on EU economic forecasts

Clusters reacted and adapted quickly to the new situation. On the one side, as key facilitators within their networks, they provided support to their cluster members in times of great uncertainty. They offered advice and helped to mitigate the negative effects of disrupted value chains and a stark drop in demand as much as they needed to accompany businesses to navigate through gradual recovery following the lockdowns around mid-2020. The COVID-19 Response Forum⁶ was set up to provide support and facilitate exchange among clusters.

On the other side, cluster organisations had to deal with similar challenges to those of their members, as economic activity needed to be moved to an almost completely virtual environment. Given their role as network creators, cluster organisations experienced even more pressure to adjust their business models and service offer to remain relevant and successful for the community.

⁴ https://ec.europa.eu/info/sites/info/files/economy-finance/ip121_en.pdf.

⁵ https://ec.europa.eu/info/sites/info/files/economy-finance/ecfin_forecast_autumn_2020_overview_en.pdf.

⁶ <https://www.clustercollaboration.eu/forum/covid-19-response-forum>.



Many clusters went at length to help their communities proactively. During the first lockdowns, clusters collected information from and for their members to answer questions and help them deal with challenges. They also contributed to reducing the stress on our health systems. They orchestrated the production of vital material such as protective masks, ventilators, and other equipment, playing out their role as focal points in regional and sectoral networks.⁷ They further helped their members to recover, playing a key role in providing support to ensure that the recovery is for example in line with the objectives of green transition and sustained digitalisation.⁸ Other clusters functioned as a key link between their members and relevant policy makers. Already from the early stages of the crisis clusters across Europe helped to rethink innovation and business to mitigate economic consequences.

While digitalisation of cluster activities challenged many organisations to continue to offer their services to their members and remain visible to them, this also created opportunities to experiment with new formats and services for their members. Webinars and virtual match-making events are just two examples of efforts of clusters to step their activities up and deliver to the needs of their members. The threat of fragmentation of societies and the economy as a negative side-effect of the measures to curb infections and deaths highlights the vital role clusters can play to create and maintain networks within and across regions and sectors.

The key challenges and opportunities for clusters in 2021

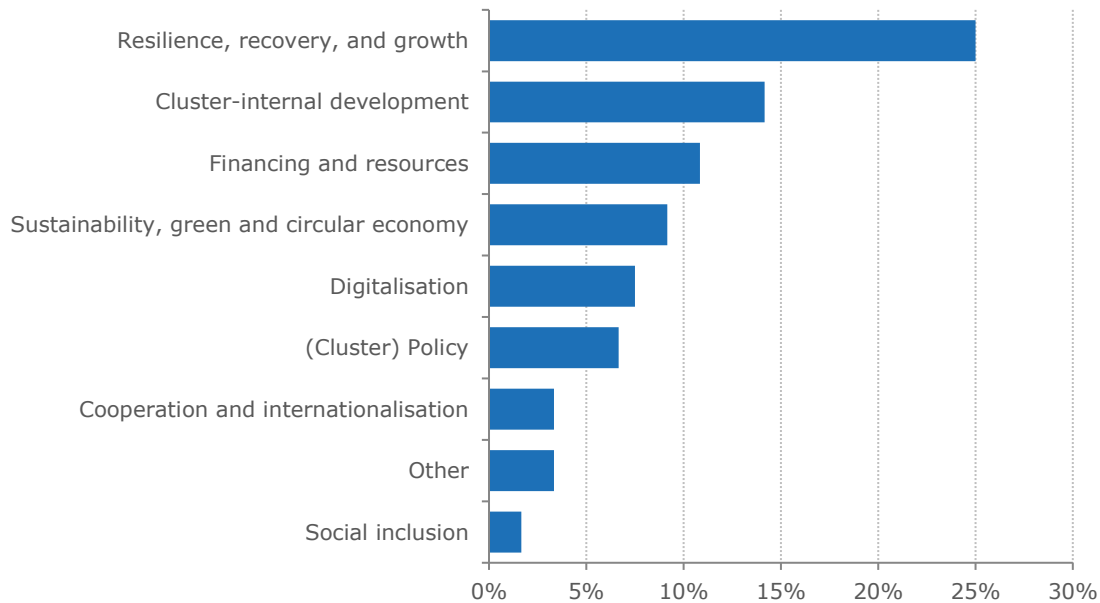
Overcoming the challenges of the COVID-19 crisis will remain a defining feature of 2021. Increasing shares of populations vaccinated will however shift the focus again from containment and protection of the most vulnerable towards reopening and rebuilding our economies and societies – especially in summer and the second half of 2021. Clusters can play a vital role in this (economic) recovery, building on the experience they collected in 2020.

While the economy is likely to recover, this does not imply a “reset” where businesses will simply go back to the same situation as before COVID-19. Rather, the health crisis functions as a pronounced stress-test. The crisis aggravates and highlights weaknesses across sectors, but also offers opportunities and accelerates developments that have been in the making for years.⁹ Moreover, the medium to long-term behavioural changes of society due to the lockdown experiences are still to be seen. However, the long-term effects of the current situation vary across sectors. It is therefore a key challenge for clusters to understand the implications and long-lasting effects to grasp what challenges their members face and what role clusters can play on the road towards economic recovery. In line with this reasoning, “**resilience, recovery, and growth**” is identified most often as the key challenge for 2021 in the Needs Survey. Cluster managers will need to reach out to their members to assess what the path to recovery could look like, and where cluster organisations can contribute.

⁷ Summary Report of the ECCP capacity-building webinar on 28 April 2020 ‘The COVID-19 cluster response. Solutions for dealing with ecosystem supply chain disruptions’ Available at: <https://master-7rqtwti-5rei54f5dl3xa.eu-4.platformsh.site/sites/default/files/webinars/2021-01/Capacity%20Building%20Webinar%20-%20COVID19%20Supply%20Chain%20Disruptions%20Report.pdf>.

⁸ Summary Report of the ECCP capacity-building webinar on 23 July 2020 ‘The COVID-19 industrial cluster response: the role of European clusters in recovery strategies’ Available at: https://master-7rqtwti-5rei54f5dl3xa.eu-4.platformsh.site/sites/default/files/webinars/2021-01/Capacity%20Building%20Webinar%20-%20Clusters%20in%20Recovery%20Strategies%20Report_0.pdf.

⁹ See e. g. www.mckinsey.com/featured-insights/leadership/the-next-normal-arrives-trends-that-will-define-2021-and-beyond.



Responses to the multiple-choice question “What key challenges will your cluster face in 2021?”

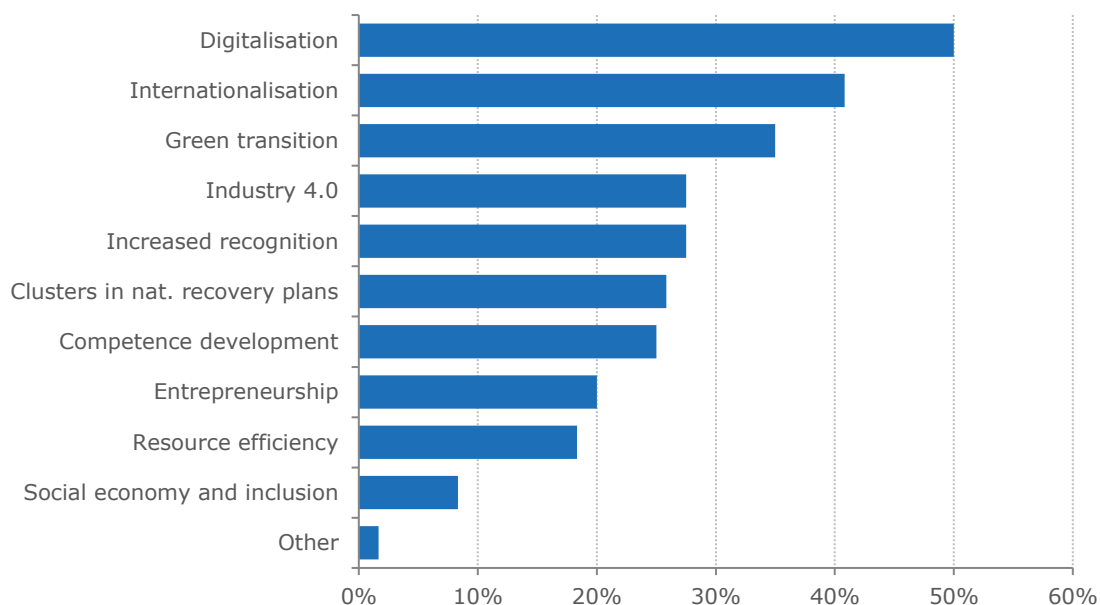
However, the transition period will not always be easy – neither for businesses, nor for clusters themselves. As mentioned above, clusters need to and continue to reassess their role and service offer for their members. As remote working arrangements and a shift towards the virtual environment will remain the ‘new normal’ at least for the foreseeable future, cluster organisations must reflect on their business model and the formats in which they interact with their members. Clusters started to and will continue to reflect on how networks can be created, shaped, and used in a more digital working environment (“**cluster-internal development**” was the second most frequently cited key challenge by respondents to the Needs Survey). Further, clusters seem concerned about financing and resources (see figure above). This again might be linked to COVID-19, where clusters see members of their organisations struggling. As a consequence, financial flows, e. g. through established services to their communities that took place in person previously, are dwindling.

Even though COVID-19 has been the defining topic of the past and current year, other trends and developments will continue as well. The push towards **digitalisation** has been greatly accelerated by COVID-19 and put pressure on businesses and cluster organisations alike to speed up their efforts. Therefore, many cluster organisations consider digitalisation less of a key challenge of 2021 (see figure above), but rather as a necessity that clusters feel prepared for by now. With the economic recovery, other topics will move up on the agenda as well. The need to transform our economies to make them **greener and more sustainable** is one of the two key policy objectives of the European Commission and has been mentioned repeatedly by respondents to the Needs Survey (mentioned fourth most often). **Upskilling** is yet another challenge for many businesses. As a study recently published by the ECCP pointed out, upskilling remains difficult for many businesses across sectors who struggle to attract sufficiently trained employees to boost productivity and revenue.¹⁰ Both topics, sustainability and climate mitigation on the one side and upskilling on the other side, are aspects where clusters can support their members and where there might be opportunities to tailor their service offer to meet the needs of the cluster communities.

¹⁰ https://www.clustercollaboration.eu/sites/default/files/WYSIWYG_uploads/discussion_paper_skills_final_2.pdf.



The key strategic priorities of clusters in 2021



Responses to the multiple-choice question “What are the key strategic priorities for your cluster in 2021?”

Economic resilience and recovery have been identified as the most common key challenges for clusters in 2021. The responses to the Needs Survey reveal the strategic priorities to handle the challenges. Digitalisation, internationalisation, and green transition are the three main priorities for clusters in 2021.

Remote working and social distancing rules accelerated an increased focus on **digitalisation**. Therefore, digitalisation remains a key priority for clusters in the new year as well, with 50% of respondents indicating digitalisation as key strategic priority. If respondents who indicated “Industry 4.0” are factored in, this pattern is even more pronounced. 2021 is the year to build upon the digital lessons learned in 2020 and take efforts to the next level.

Internationalisation – which was challenging in 2020 due to travel restrictions – is also a top priority for half of the responding clusters. Based on the feedback, this does not necessarily refer to third countries, but also entails plans to enhance links and networks within the EU. In 2021, it is time to reignite the internationalisation of SMEs and the European clusters appear eager and ready to support it. The digitalisation of services and work makes it easier for clusters to exchange and cooperate with one another, creating new opportunities to learn from peers and identify opportunities to realise projects jointly.

The green transition is a key priority of the European Commission and will regain greater attention during and after the recovery. The European Commission is pushing for a green and digital recovery with its recovery instrument **Next Generation EU**.¹¹ Businesses and clusters are equally aware that sustainability and climate change mitigation will be defining topics of the time to come. Investment in green technologies and services can help to remain competitive and create new markets for businesses across sectors. Clusters are of course interested in steering and contributing to this development. Therefore, the **green transition** has been mentioned by a third of respondents to the Needs Survey as strategic priority for 2021.

¹¹ https://ec.europa.eu/info/strategy/recovery-plan-europe_en.



Key plans for developing clusters in 2021

Key challenges and strategic priorities are highly linked – ideally, the strategic priorities are based on the identified challenges. Jointly, the two for the building blocks of a development plan that specifies how the strategic priorities can be implemented to address the key challenges (see figure below).



The identified key challenges, especially the **cluster-internal development and financing** resources, appear to be mirrored in the development plans of clusters for 2021. Finding new financing opportunities appears high up on the agenda of clusters, with “Securing new sources of financing” and “Better understanding of funding possibilities” among the top five options selected by respondents (46% and 36%, respectively). Looking at the most popular development plan for respondents, “Offering new cluster services” (56%), it can be understood that clusters need to further tailor their offer to members and while ensuring new sources of financing to build a sustainable cluster organisation.



Responses to the multiple-choice question “What are your key plans for developing your cluster in 2021?”



In line with the plan to offer new cluster services is the second-most popular option, i.e., the intention to develop and update the **clusters' strategies** (50% of respondents). With a strong move to a virtual environment and a disruption of networks and business-as-usual in 2020, clusters appear to see a need to take stock of their current strategy and offer to members. They may need to reflect on their value proposition to make sure that they and their services are relevant to cluster members. Consequently, plans to improve the communication about and branding of the clusters is mentioned relatively frequently as well (36%).

On the flipside, aspects such as training for cluster staff or hiring new staff have been selected less frequently (17% and 7%, respectively), suggesting that key plans for clusters in 2021 are more strategic than operational. This finding is particularly noteworthy considering that most of the responses to this questionnaire stem from clusters that have been running for more than 10 years already.

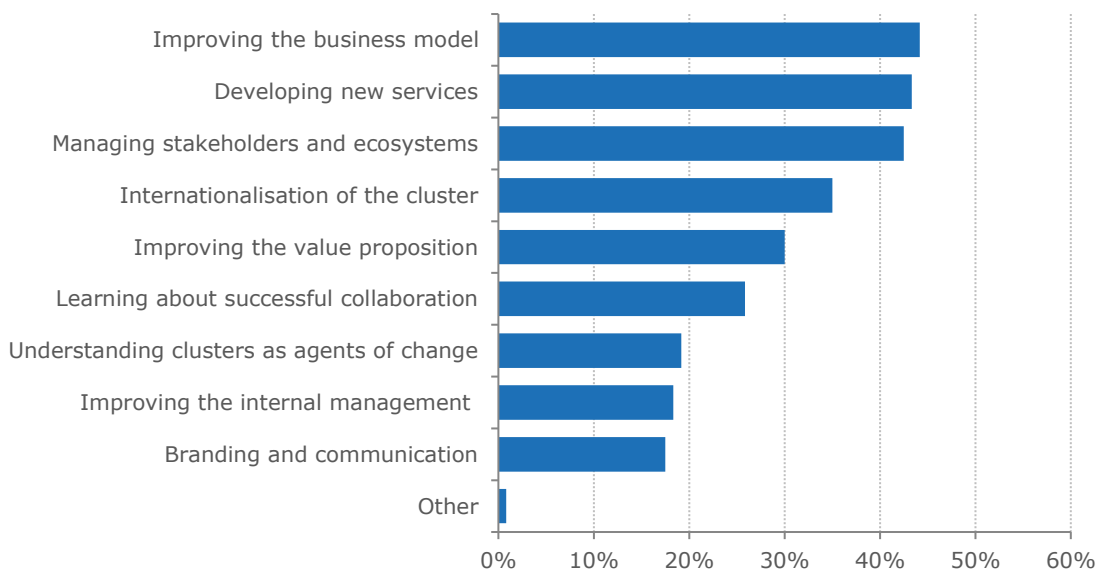


2 Capacity-building needs

Strong cluster organisations are key to handle the identified challenges on resilience and recovery and the strategic priorities on digitalisation, internationalisation, and green transition. Capacity building is key to unfold the full potential of cluster organisations in 2021. Because new challenges and priorities call for new and updated skills.

In this report, two layers of capacity building of clusters are identified: at cluster organisation level (1) and at the level of the staff of the cluster organisation (2). Capacity building of cluster organisations focuses on having the right business model, services, and value proposition at hand to serve their community. The development of the staff of the cluster organisations prioritises having the right and updated competences within the cluster management team to ensure the capacity to address the challenges and drive prioritised changes.

Needs of cluster organisations



Responses to the multiple-choice question “What are your cluster’s current capacity building needs?”

To realise their strategic plans for 2021 and respond to the identified challenges, clusters indicate that they need further capacity building support. Most frequently, respondents identified developing **new business models** (44%) and developing **new services** (43%) as key capacity-building needs of the clusters, directly linking their learning needs to the strategic plan indicated most frequently (see above). This need to step up capacity with regards to the business model further links to the reoccurring aspect of **financing** that respondents to the questionnaire seem to be concerned about.

Almost an equal number of respondents (42%) indicate that they need to enhance the capacity of their clusters to **manage and engage** their members and the wider ecosystem, which again links to the challenge that clusters appear to see in relation to their **value proposition** (still mentioned by 30% of respondents) and service offer.



There appears to be a need of clusters to **learn and exchange** with their peers, which is reflected in the responses indicating “internationalisation of the cluster” (35%) and “learning about successful collaboration” (26%) as a capacity-building need for cluster organisations.

These needs directly reflect the challenges and priorities that the analysis has revealed above. The activities of clusters need to remain topical and relevant for their member businesses to maximise the effectiveness of cluster organisations. The disruption COVID-19 caused in 2020 means that clusters need to rethink their offer and align it with changing preferences of their members. Yet, as many of the clusters that responded to the Needs Survey have been established for a while already, cluster managers and staff might find it challenging to rethink their business model and might be uncertain about the right tools to use. They developed their business model under different circumstances and benefitted from a relatively steady growth across countries of the EU over the last couple of years. Now, with economic uncertainties and a drop in production and demand, cluster organisations appear less confident that the sources of financing they have relied on in previous years will continue to generate the revenue needed to maintain their existence.

One important source of inspiration are other successful clusters. It is therefore not surprising that organisations see a need to enhance capacity-building by learning from their peers. Clusters that continue to develop their value proposition and service offer can successfully serve as a benchmark for clusters to shape their own development. Yet, it is important for cluster organisations that the development of a value proposition and business model is highly contingent on the individual case, depends on the sector, and regional and national specificities of a given ecosystem. Therefore, it will be important for cluster organisations to strike a balance between relying on the input from other clusters and finding their own path towards greater success.

Needs of cluster management



Responses to multiple-choice question “What are your current needs for improving your personal cluster management skills?”.

Even though many of the cluster organisations that participated in the survey are quite mature, there is still a need to improve the skills of the cluster management. Almost 50% of respondents would like to learn more about **funding opportunities**,



linking the personal development needs back to the overall needs and strategic plans of clusters in search of new, sustainable financing opportunities. Skills in **strategy development** (42%) **and innovation management** (34%) could help clusters to rethink and fine-tune their value proposition and business model to tailor their services and identify potential gaps in their offer to their member companies. One in three respondents also identified a general need to step up their skills in general **project management** and **communication and branding**. The high interest that the ECCP capacity-building webinar on communication strategies in June 2020 received illustrates that this area remains high up on the agenda of cluster managers. Finally, there seems to be a further need to step up topical expertise: if combined, 51% of respondents indicated that they need to enhance their knowledge on EU policies and/ or their industry specific knowledge.

The responses show a clear connection to the capacity-building needs at organisation level. The need to learn more about funding opportunities clearly links to the need of cluster organisations to identify new sources of finances. That said, the types of funding opportunities are highly varied. Generally, it is possible to differentiate between public funding and revenue from services clusters can offer. The clearly expressed need to rethink their business models and service offerings suggests that many cluster managers are aware that their organisations will not be able to solely rely on public funding, but that their value proposition needs to be sufficiently convincing to their members to increase their willingness to pay for services the cluster offers. The identified needs to learn about and understand strategy development and innovation management better suggest that cluster managers are eager to revise their organisations' business models, yet they need more support in structuring and implementing this thought process. The self-assessment that management must step up their knowledge on communication and branding links directly back to the identified need to engage the ecosystem more effectively to enhance outreach, added value, and revenue of the cluster.



3 Capacity-building webinars: content and concept

The ECCP offers capacity-building webinars that aim at supporting cluster managers by providing insights and peer-to-peer learning opportunities on burning issues for clusters and their development. They give an opportunity for clusters to enhance their skills and knowledge. Featuring speakers from the cluster community, the two-hour-long webinars pick up skills and thematic topics and offer practice-oriented advice and deep-dives. Presentations by peers and practitioners are kept short on purpose to allow for time to ask questions and discuss aspects related to the topic of the individual webinar.

In 2020, four webinars were delivered. Two webinars focused on communication strategies for and the digitisation of services of cluster organisations. The other two were dedicated to COVID-19 related topics, with the first one focusing on cluster responses to supply-chain disruptions in spring 2020, and the other one centred on the role of clusters in the economic recovery. The results of the Needs Survey confirm that this selection of topics has been in line with the key challenges and priorities of clusters. The question of how to ensure a swift recovery of the economy and the role clusters can play in this has been identified as key challenge by a considerable share of respondents. The webinars on digitisation and communication picked up topics that remain at the heart of many clusters organisations as strategic priority and developing plan for 2021 (see Chapter 1).

Topics for future webinars



Responses to the open-ended question “Please suggest topics for future capacity building webinars from the European Cluster Collaboration Platform!”

To ensure that the webinars remain relevant, the questionnaire asked directly about topics for the future capacity-building webinars. The figure above provides an overview of the responses.



Generally, the topics respondents would like to see covered by the capacity-building webinars are in line with the expressed development plans and capacity needs for cluster and managers presented above. Thus, **financing and funding opportunities** constitutes the topic mentioned most frequently, followed by **engagement of stakeholders and the ecosystem**.

As the full list of topics is quite long and several topics are interrelated, responses were further clustered for this section. The table below reports on this clustering and provides a clearer idea of the topics that respondents would like to hear about in the next capacity-building webinars.

Topic group	Number of responses
Cluster business development	25
Internal cluster management	16
Communication and engagement	15
Thematic	9
(Cluster) Policy	5
Other	9

Very high on the list of topics is **cluster business development** (32%). This entails financing opportunities, as well as business models, business opportunities, and strategy development. Given the prominence these topics seem to receive in the development plans of clusters in 2021, it is understandable that business development ranks highest among potential topics for the webinars as well. This demand confirms the analysis above that clusters appear to rethink their value proposition and service offer, also in search of new funding opportunities, and they seem to need support to do so. The responses confirm the findings from two previous surveys to members of FCAN¹² and FESCP¹³, which bring together umbrella organisations of clusters. In these two questionnaires from March 2020, the umbrella organisations identify financing opportunities as highly relevant theme for upcoming webinars. In their responses, they differentiate between public funding opportunities on the one, and paid services on the other side. Internationalisation, digitisation, and cluster-internal capacity building (e.g. leadership skills, but also service offer and value proposition) or other topics more frequently raised by respondents to these two surveys.

Internal cluster management ranks second highest (20%), entailing elements such as knowledge management, but also leadership and collaboration and **internationalisation**. While internal development received less emphasis by respondents as key development plan or strategic priority, cluster managers must deal with the day-to-day management of their cluster to ensure their success and seem to need further guidance and input on related topics.

Almost the same number of respondents (19%) identify **communication, branding, and the engagement of the ecosystem** as important topics for the capacity-building webinars. While one of the webinars in 2020 focused on communication, there appears to remain a greater need among clusters to understand how they can reach out to their members and the wider community more effectively. To remain relevant, clusters need to connect to their regional ecosystems and utilise network effects. Responses suggest that this is not an easy task, not even for well-established clusters, which represent the bulk of

¹² Forum of the European Cluster Associations and Networks.

¹³ Forum of European Cluster Partnerships ESCPs. The new acronym is FECP.

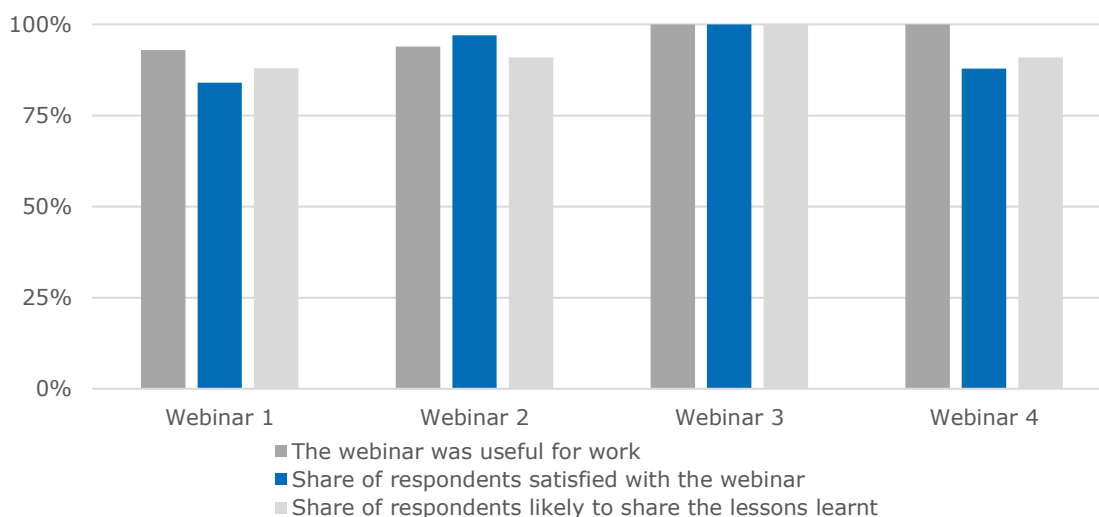


responses to the questionnaire. For newly created clusters that are still in the process of defining their role and added value to their ecosystems, this task will be even more challenging. It is important to keep in mind that the question on how to engage the ecosystem is not purely a communication issue. Rather, it is highly linked to the aspect of cluster business development discussed above. To successfully engage their ecosystems, clusters will need to fine-tune their service offer and present a convincing value proposition to their (potential) members. As discussed, social distancing rules and a shift to remote working arrangements has rendered this more challenging for clusters, which explains why the topic is high on the agenda for respondents to the Needs Survey.

Mirroring the observed personal need of respondents to step up their knowledge on thematic issues (either industry- or cluster-specific), respondents also suggest thematic (11%) or policy-related (6%) capacity-building webinars in 2021. Judging from responses to this question and identified developments and strategies (see Chapter 1), the topic of **green transition** appears to be highly topical. While it received less attention in 2020, the European Green Deal¹⁴ will shape policymaking for the coming years, and industries across sectors feel increased societal and economic pressure to do business more sustainably and environmentally friendly.

Format of future webinars

Feedback to the webinars in 2020 has been consistently positive. The figure below provides an overview of the feedback to the four webinars that took place in 2020.¹⁵ The information is drawn from satisfaction surveys that were run after each of the four webinars. The responses show that always at least four out of five participants were satisfied or very satisfied with the webinars overall (blue bar). An even greater share of respondents indicated that the webinar was indeed useful for their work (dark grey) and that they would share the lessons learnt (light grey).



Responses to the satisfaction surveys of the individual webinars

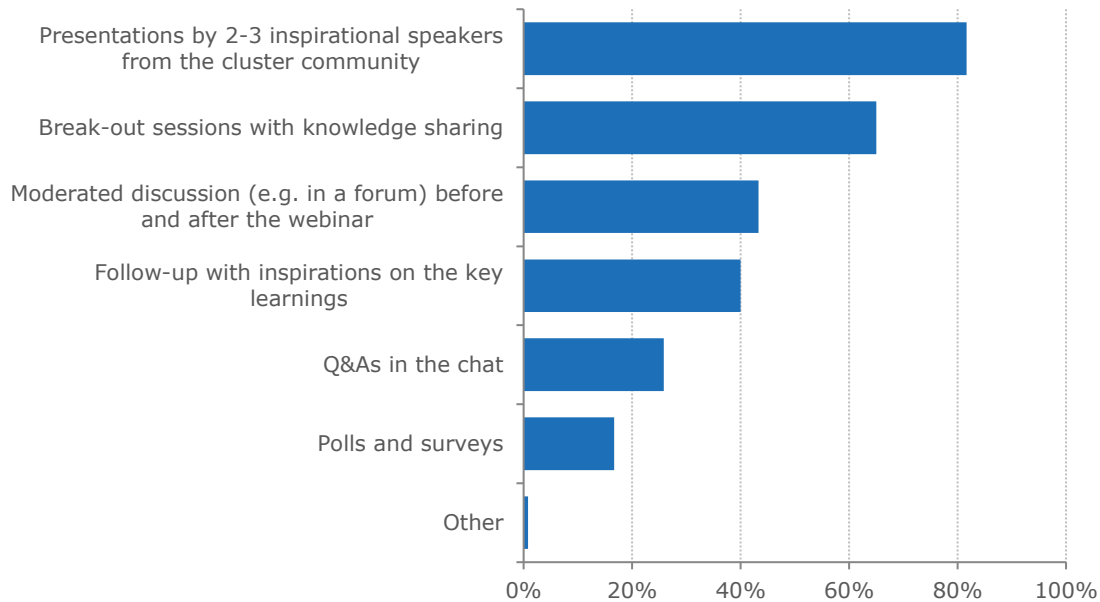
The Need Survey provides further detail, supporting the patterns observed across satisfaction surveys. A stark majority of respondents (82%) approves of the current **format** of presentations by 2-3 speakers from the cluster community during the capacity-building webinars. About two thirds of the respondents would also like to see **break-out sessions** during webinars

¹⁴ https://ec.europa.eu/info/strategy/priorities-2019-2024/european-green-deal_en

¹⁵ The four webinars in 2020 focused on Solutions for dealing with ecosystem supply chain disruptions due to COVID-19 (Webinar 1), communication strategies for clusters (Webinar 2), the role of clusters in recovery strategies (Webinar 3), and the digitalisation of cluster services and activities (Webinar 4).



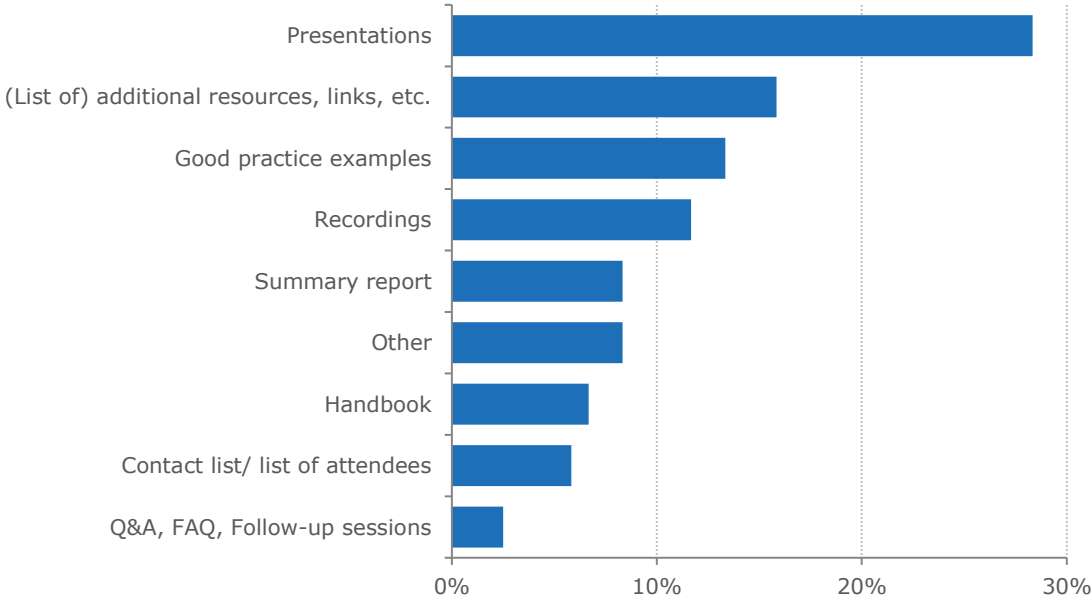
to enhance the knowledge sharing. Polls & surveys (17%), as well as Q&A in the chat (26%), receive less support, while still almost half of the respondents appreciate a **moderated discussion before and/or after the webinar** take place.



Responses to the multiple-choice question "Which online format would you like to see in the future capacity building webinars?"

While responses show some variation in the preferred **follow-up actions**, the feedback highlights that some form of follow-up is expected and needed to ensure that the messages and insights of the webinars can be processed and shared by the attendees.

To maximise the learning effect of the capacity-building webinars, respondents most frequently indicate that they would like to receive the **presentations** of the webinars afterwards (34 responses), as well as a list of **additional resources and links** (19 responses). 16 respondents further appreciate **good practice examples**, although it does not become clear from the input whether they would like to receive more details on the good practices usually presented during the webinars, or information on additional good practice examples. **Recordings** of the webinars are still mentioned by 14 respondents, while the Summary Report was selected by 10.



Responses to the open-ended question "What kind of supporting materials would you like to receive after the webinar?"



4 Conclusions: Roadmap to the capacity-building needs in 2021

Clusters emerge from a challenging year 2020. The past year presented societies, businesses, and clusters with unprecedented challenges. The COVID-19 crisis and the measures to keep casualties to a minimum completely changed the setting where clusters operated. Remote working and social distancing throughout the year, a stark drop in the economic activity in the second quarter and a sluggish economic recovery in the second half year put pressure on clusters, undermining their key role as facilitators of networks and ecosystems. Yet, cluster organisations were up for the challenge, taking their role forward to support their members, coordinate harmonised responses to the crisis and adapt their activities and service offer to a digital environment.

In 2021, clusters will need to define their role in the economic recovery. With the rollout of vaccination campaigns across the EU, the future looks more promising. However, the recovery will not lead us back to the pre-crisis situation. For instance, digitalisation has been accelerated and new opportunities have been found across sectors. Clusters will need to reassess their role and their value proposition, reflecting on changing needs of their ecosystems. Businesses and governments struggling with economic hardship will require clusters to diversify their sources of financing. Other important topics, such as the green transition, will re-emerge as defining topics for the foreseeable future.

The strategic priorities and capacity-building needs of clusters reflect these developments.

- The Needs Survey suggests that clusters identified the economic recovery as the **key challenge** for 2021, followed by cluster-internal needs to rethink their business models, value proposition, and financing.
- While digitalisation was already high up on the agenda of clusters in 2020, it remains a **key strategic priority** for this year, followed by internationalisation (within and outside the EU) and inter-cluster collaboration and the green transition.
- For their organisations, cluster managers envisage as **key development plan** a refinement of their model to strengthen their offer and remain economically viable.
- Clusters are not always fully prepared for these challenges. They need to step up their **thematic knowledge**, for example on the green transition. Cluster managers see further needs for their organisations to understand how to engage their ecosystems effectively and are eager to hear more about tools to revise their business models. At the personal level, strategy, innovation, and project management are high up on the agenda of skills cluster managers are interested in.

Feedback to the Needs Survey confirms that the capacity-building webinars organised by the ECCP in 2020 were highly relevant.

- The **topics** covered in 2020 matched the needs expressed by the survey respondents. The webinars on communication strategies in summer and digitalisation of cluster activities in Autumn 2020 coincided with some of the key challenges and priorities cluster managers identified. The two COVID-related webinars in spring and



summer 2020 were highly topical at the time of implementation and responded to the key challenge that survey respondents identified for 2021. The results of feedback surveys after the webinars reveal that the content of the presentations and discussions was the part that 80% of respondents enjoyed the most. On average, 59% of respondents to feedback surveys considered themselves “very satisfied” with the four webinars.

- The **format** of practice-oriented, two-hour long webinars that feature speakers and good practices from the (wider) cluster community is very much appreciated by respondents to the survey. Feedback from participants in the webinars in 2020 supports this statement, with 85% of respondents considering the length of these sessions “about right” and 51% finding them useful for their work “to a great extent”. What is more, these capacity-building activities contribute to improving the attendees’ perspective on the EU cluster policy, with 59% of respondents of feedback surveys stating that their opinion improved “to a great extent” thanks to the webinars.
- **Follow-up** actions such as sharing the recording of the webinar, the presentations and a written report meets the preferences of respondents. Nonetheless, improvements on the format of the Summary Report will be undertaken based on recommendations from the EC to make this document more concise and practical.

The thematic focus of the capacity-building webinars in 2021 must reflect the needs and strategic priorities of clusters and their managers. The responses to the survey show topics reoccurring across questions as particularly relevant for the community. The analysis and feedback to the Needs Survey has shown that the capacity-building needs of clusters run along two axes: skills and thematic knowledge. The webinars will therefore address both types of needs in 2021:

- **Communication and stakeholder engagement** is an area that respondents repeatedly selected as a challenge and learning need across questions. The 2020 webinar on communication strategies provided some valuable insights for clusters. However, engaging the ecosystem – not covered by any webinar so far- is a related issue of equal importance, given that creating and maintaining vivid networks is at the core of what clusters do. Ideally, the first webinar can focus on this area in Q1 of 2021.
- **Green transition** and climate change mitigation will be defining challenges for the years to come. Clusters are aware of this trend and have the potential to support and drive the development towards greater sustainability. As facilitators of networks and ecosystems, they are well-positioned to coordinate and communicate among businesses and other actors in their regions. To support these activities and provide cluster managers with tools and guidance how clusters can contribute to green transition, a webinar in Q2 of 2021 will be dedicated to this topic.
- There appears to be a strong focus on **business development** among clusters. At the same time, respondents also expressed a need to learn more about business models, strategy development, and how to enhance the value proposition and service offer of clusters. This focus on business development is at least partly driven by concerns of clusters to secure sufficient and sustainable **sources of funds** to finance their activities. The third webinar for this year will therefore focus on these aspects. It will most likely be implemented in Q3 of 2021.
- **Internationalisation** is another reoccurring topic for clusters. While 2020 established barriers for the physical exchange across borders, the year also created opportunities to cooperate across borders in the digital environment. To facilitate recovery, clusters will need to reach out to their peers and facilitate exchange among themselves as well as among their cluster members. Therefore, a fourth webinar will explore the topic of internationalisation, focusing on elements such as digital opportunities and management of international



ecosystems. Given that internationalisation will be easier once travel and other restrictions are lifted again, the webinar on internationalisation will be the last of 2021 in Q4.

The format of the webinars and of the follow-up actions will be aligned with the expectations of the community.

- Direct feedback after each webinar shows that the **duration and format** of the webinars is generally appreciated. With an average of 60%, attention to attendance ratio is high.¹⁶ The attendance rate for the capacity-building webinars appears to be above average.¹⁷ However, many respondents to the Needs Survey also indicated that break-out sessions could enhance the learning effects. Therefore, this will be explored as a potential modification to the current set-up of webinars.
- Finally, the **follow-up** deliverables will be fine-tuned.
 - o Once the new ECCP website is launched, cluster managers will have easy access to the recordings and presentations of webinars. It can also be explored if the new website can be used to facilitate a moderated discussion with participants before or after the webinars take place.
 - o Instead of a comprehensive Summary Report that with a detailed description of the webinar, a summary briefing will be drafted in the future. This concise document will highlight the key lessons learned of each webinar and provide guidance to further materials and sources to inspire the reader to learn more. It can also contain information on good practice examples, featuring pictures and success stories.

¹⁶ The attention to attendance ratio indicates the share of time people participated in a webinar and focused their attention on the presentations and discussions.

¹⁷ The attendance rate is actual attendees over registrations. See <https://logmeincdn.azureedge.net/gotomeetingmedia/-/media/pdfs/g2w-big-book-webinar-stats.pdf>.

Annex

Frequency tables



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



Annex – Frequency tables

The following tables illustrate the frequency of responses for each of the questions included in the Needs Survey run by the ECCP team in November and December 2020. While graphs and statistics are presented in the report, the tables below offer the absolute numbers for full transparency.

Question 1: What are the key strategic priorities for your cluster in 2021?

Response	Count
Digitalisation	60
Internationalisation	49
Green transition	42
Industry 4.0	33
Increased recognition	33
Clusters in nat. recovery plans	31
Competence development	30
Entrepreneurship	24
Resource efficiency	22
Social economy and inclusion	10
Other	2

Question 2: What key challenges do you expect your cluster will face in 2021?

Response	Count
Resilience, recovery, and growth	30
Cluster-internal development	17
Financing and resources	13
Sustainability, green and circular economy	11
Digitalisation	9

Response	Count
(Cluster) Policy	8
Cooperation and internationalisation	4
Other	4
Social inclusion	2

Question 3: What are your key plans for developing your cluster in 2021?

Response	Count
Offering new cluster services	67
Developing or updating your cluster strategy	60
Securing new sources of financing	55
Improving communication and branding	43
Better understanding of funding possibilities	43
Better understanding of EU policies	25
Training of cluster management and staff	21
Implementing new CRM-systems	13
Hiring new staff	9
Other	2



Question 4: What are your current needs for capacity building of your cluster organisation?

Response	Count
Improving the business model	53
Developing new services	52
Managing stakeholders and ecosystems	51
Internationalisation of the cluster	42
Improving the value proposition	36
Learning about successful collaboration	31
Understanding clusters as agents of change	23
Improving the internal management	22
Branding and communication	21
Other	1

Question 6: Which online formats would you like to see in the future capacity building webinars?

Response	Count
Presentations by 2-3 inspirational speakers from the cluster community	98
Break-out sessions with knowledge sharing	78
Moderated discussion (e.g. in a forum) before and after the webinar	52
Follow-up with inspirations on the key learnings	48
Q&As in the chat	31
Polls and surveys	20
Other	1

Question 5: What are your current needs for improving your personal cluster management skills?

Response	Count
Learn more about funding possibilities	59
Strategy development	51
Innovation management	41
Project management	36
Communication and branding	35
Learn more about EU policies	34
Update knowledge of the cluster's specific industry	27
Leadership skills	24
Facilitation and process management	23
Other skills	0



Question 7: Please suggest topics for future capacity building webinars from the European Cluster Collaboration Platform!

Response	Count
Financing and funding opportunities	13
Stakeholder/ eco-system engagement	10
Thematic	9
Other	9
Leadership and cluster management	7
Cluster Communication	5
Value proposition	4
Internationalisation	4
Business model	3
Business opportunities	3
Inter-cluster collaborations	3
Cluster policies	3
Strategy development	2
Knowledge management	2
EU policies and links to clusters	2

Question 8: What kind of supporting materials would you like to receive after the webinar?

Response	Count
Presentations	34
(List of) additional resources, links, etc.	19
Good practice examples	16
Recordings	14
Summary Report	10

Response	Count
Other	10
Handbook	8
Contact list/ list of attendees	7
Q&A, FAQ, Follow-up sessions	3

Question 10: Do you manage or work for a cluster organisation?

Response	Count
Yes	97
No	21
I do not know	2

Question 11: What is your role in the cluster organisation?

Response	Count
Manager/ officer	56
President/ secretary-general/ director/ CEO	17
Other	17



Question 12: What technology field is your cluster mainly active in?

Response	Count
Industrial manufacturing, material and transport	29
Other	24
Electronics, IT and telecommunication	12
Agrofood industry	6
Other industrial technologies	6
Biological sciences	5
Agriculture and marine resources	3
Energy	3
Social and economic concerns	3
Protecting man and environment	2

Question 15: When was your cluster established?

Response	Count
Less than 5 years ago	27
Between 5 and 10 years ago	18
More than 10 years ago	49

Question 13: How many members does your cluster have?

Response	Count
Less than 50 members	19
Between 50 and 100 members	34
Between 100 and 200 members	24
More than 200 members	16

Question 14: How many staff members does your cluster organisation have?

Response	Count
Between 1 and 5	57
Between 6 and 10	20
More than 10	17



■ Publications Office
of the European Union