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CLUSTERS MEET REGIONS



MALMÖ

SWEDEN | 15-16
JUNE 2023

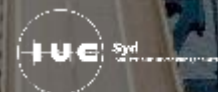
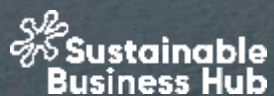
CLUSTERS AS BOOSTERS OF INNOVATION
IN INDUSTRIAL ECOSYSTEMS



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WELCOME





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European Cluster Collaboration Platform

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Agenda

08:45 – 09:45

Welcoming address and setting the scene

Session 1: Introduction: Clusters as boosters of innovation in industrial ecosystem

Presentation of the ECCP Input paper

09:45 – 10:00

Coffee Break

10:00 – 11:00

Session 2: Strategy: Clusters and innovation ecosystems addressing priorities and challenges on Digital and Green Transitions

11:00 – 12:00

Panel Discussion: The Swedish model of collaboration with innovation actors as regional, national and international level

12:00 – 13:15

Networking Lunch

13:15 – 15:15

Session 3: Method: The role of enablers of Digital and Green Transition

15:15 – 15:30

Coffee Break

15:30 – 16:30

Session 4: Interregional collaboration

16:30 – 17:30

Bubbles & Networking



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Setting the Scene – Input Paper for Skåne

Dr. Jan-Philipp Kramer

Team Leader 'Data & Policy',
ECCCP / Prognos AG



Economic profile of Skåne & South Sweden

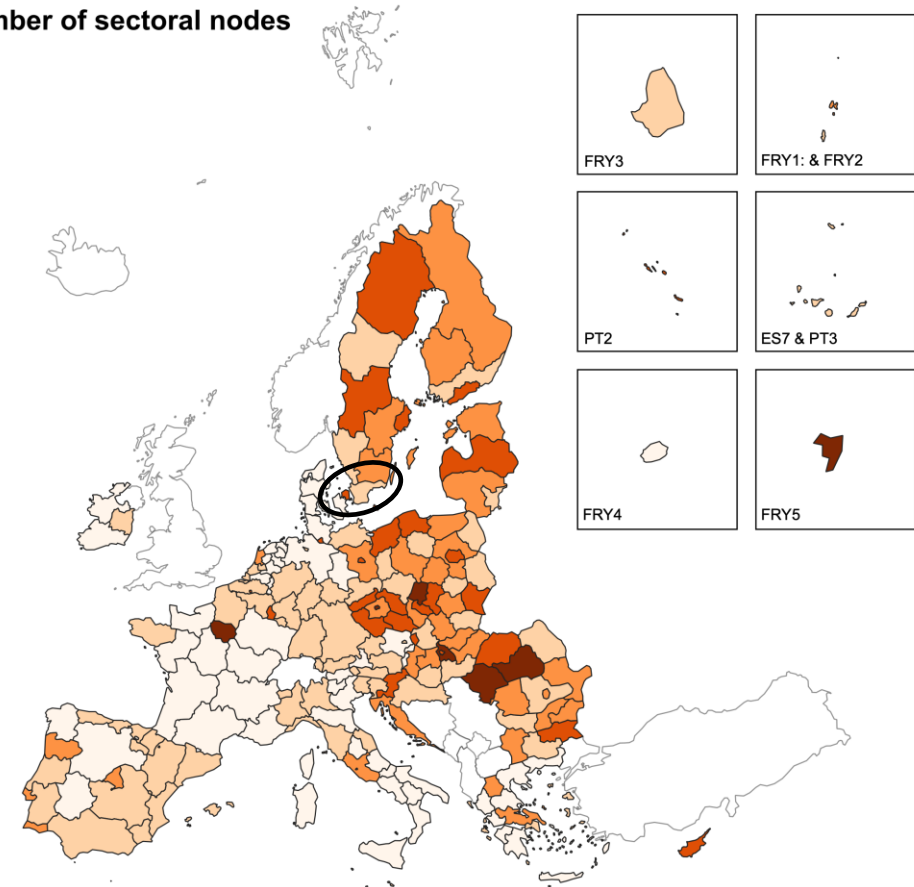
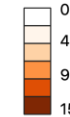
General trends in the economy:

- Considerably large county in Sweden with **€56.4 billion GDP** in 2020 (representing 90% of South Sweden's and 20% of Sweden's total GDP)
- Skåne shows a generally **positive trajectory** with consistent growth, with the region being resilient to recent crises

Sectoral composition:

- Services make up two-thirds (72.3%), while manufacturing composes 8.7% of employment
- The **health ecosystem** comprises the largest employment share across all ecosystems (higher than the national and EU27 average)
- 5 regionally relevant sectoral nodes mainly correspond to the **Health** and **Proximity & Social Economy** ecosystems
- Also: relatively high concentration in **Digital, Cultural** and **Creative Industries** and **Civil Security**, as well as **Construction**, showing diverse prospects in sectors for regional growth through clusters

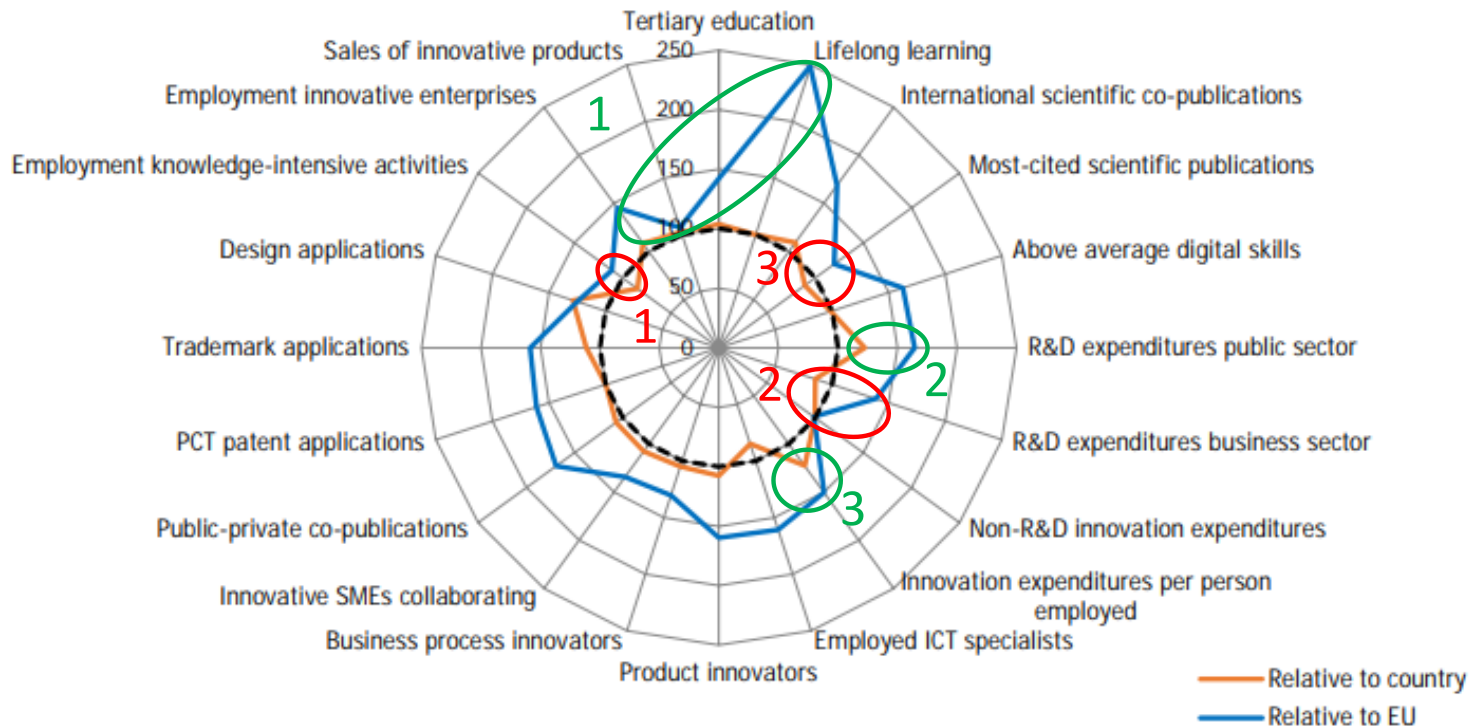
Number of sectoral nodes



Source: ECCP (2023), own contribution based on Eurostat.

South Sweden's innovation & regional competitiveness performance

RIS: SE22 – South Sweden as a “Leading Innovator”



Source: Regional Innovation Scoreboard 2021

Strengths

1. Tertiary education & lifelong learning (*relative to EU*)
2. R&D expenditures in the public sector (*relative to EU & Sweden*)
3. Innovation expenditures per person employed (*relative to EU & Sweden*)

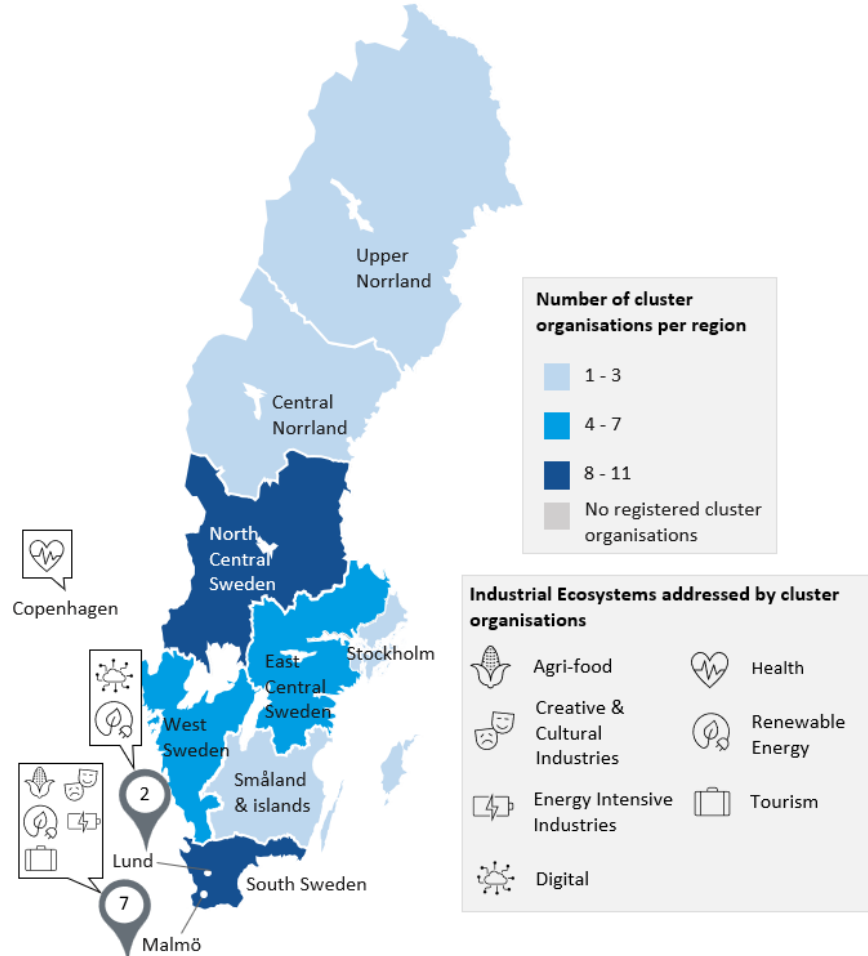
For future development:

1. Employment in knowledge-intensive activities (*relative to Sweden*)
2. R&D expenditures in the business sector (*relative to Sweden*)
3. Most-cited scientific publications (*relative to Sweden*)

Regional Competitiveness Index 2022

- Above average performance in both the Basic, Innovation and Efficiency Sub-Indexes,
- Particularly strong indicators for institutions, technological performance and innovation

Cluster organisations* in Skåne: Locations, sectors and structures



Cluster Organisations

- Nine Cluster Organisations (CO) registered on the ECCP from Skåne (11 COs in South Sweden as a whole)
- Covering seven out of 14 EU Industrial Ecosystems
- One cross-boarder CO based in Copenhagen

Member Structure

- SMEs account for large majority of CO members (81%; ØEU: 84%)
- Large companies significantly above EU-average (16%; ØEU: 9%)
- Significantly smaller share from the research sector: 4% (ØEU: 7%)

Collaborative Areas:

- Internationalisation
- Partnering for projects
- Exchanging with peers

Source: ECCP (2023). Own elaboration based on <https://reporting.clustercollaboration.eu/all>; last access 02.03.2023. *registered on the ECCP

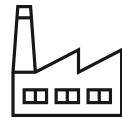
Importance of cluster organisations for regional economic competitiveness

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



Business environment

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



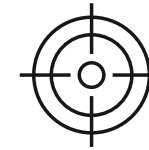
Firm behaviour

- ++ Business R&D expenditure
- + Employed ICT specialists



Intermediate performance indicators

- + Apparent labour productivity
- + PCT patents per Capita
- + ICT patents



Outcome indicators

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

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

++ Positive correlation

+ Weak positive correlation

Source: Own elaboration based on ECCP Summary Report 2022



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

2014-2020 funding period

2021-2027 funding period



INNOSUP-1

- Horizon 2020 initiative
- Development of new-crossectoral industrial value chains across the EU
- **Three clusters involved in three INNSOP-1 projects (Cross4Health, INcluSilver and NEPTUNE)**



ESCP-4i

- COSME initiative
- Development and implementation of joint internationalisation strategies to support SME internationalisation
- **Three clusters involved in seven ESCP-4i (GCA, INTonomous, MobiGoIn, AdPack, EC2i and EUT)**



ESCP-4x

- COSME initiative
- Boost the cross-cluster networking and learning within the EU and development of cluster management excellence
- **No cluster participation from Skåne region in ESCP-4x.**



ESCP-S3

- COSME initiative
- Boost cluster cooperation in specific thematic areas in the field of regional smart specialisation strategies
- **No cluster participation from Skåne region in ESCP-S3.**



Euroclusters

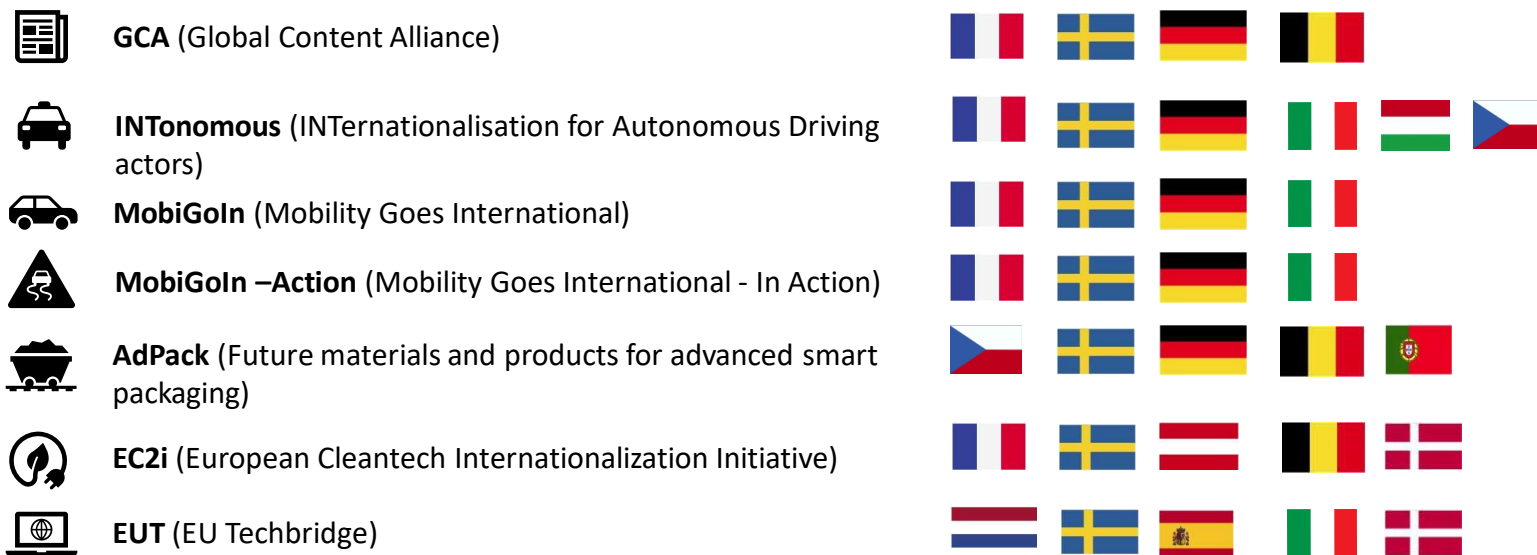
- Single Market Programme
- Support the implementation of the EC industrial strategy through cross-sectoral, interdisciplinary and trans-European cluster initiatives
- **One cluster involved in one Euroclusters (Silicon Eurocluster)**

Source: ECCP (2023)



Three clusters from Skåne involved in ESCP-4i with European partners

Overview of involvement in the ESCP-4i

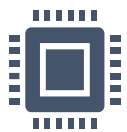


- **Seven project participations in the ESCP-4i** from three cluster organisations from Skåne region
- **33 European cluster partners** from 12 different countries
- **Thematic focus:** Value chains of autonomous driving, cleantech solutions and advanced smart packaging
- **Different target markets:** Canada, USA, Singapore, China and United Arab Emirates

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



One cluster organisation from Skåne part of first Eurocluster call



Mission: greater European self-sufficiency, with increased competitiveness and resilience in the electronics value chain, with attention to SME



- The **cluster organisation** Mobile Heights is involved in the Eurocluster “Silicon Europe”
- **Thematic focus** on increasing resilience and competitiveness of SMEs in electronics value chain
- **10 cluster partners** come from nine different EU Member States
- Represents more than **2,000 companies** & research institutions
- Members are **leaders in digital technologies** such as Micro- & Nanoelectronics, Cyber Security, Photonics & Robotics

Source: ECCP (2023); based on information from Funding & Tender Portal and <https://www.silicon-europe.eu/home/>



Smart Specialisation in the Skåne region

- Cluster organisations (can) play an important role in the **design & implementation of S3**.
- Skåne's S3 developed by Research & Innovation Council in which cluster organisations are represented through the board of the cluster organisations
- Priority areas are **based on existing business clusters** in the region
- Skåne's Innovation Strategy for Sustainable Growth identifies **six priority areas**.



Priority areas of Skåne

1. Tech
2. Life science and health
3. Food
4. Advanced materials and manufacturing
5. Smart sustainable cities
6. ess, max iv and the Science Village innovation system

Source: ECCP (2023) own elaboration based on Skåne's Innovation Strategy for Sustainable Growth

Final Remarks



Economic profile

- Economic structure of Skåne & South Sweden region characterized by large services sector, with notable growth observed in recent years. Sectoral composition in the economy of South Sweden presents diverse range of prospects in various sectors.
- Above EU-average innovation performance (“Leading Innovator”)

Cluster landscape

- Region reports the highest absolute number of registered cluster organisations on the ECCP of all Swedish regions.
- Many cluster organisations show a strong priority for international collaborations and partnering for projects



Cross-border cooperation

- Cluster organisations from Skåne were involved in cross-border projects (INNOSUP-1 and ESCP-4i) in the 2014-2020 period.
- Mobile Heights is involved the Eurocluster “Silicon Eurocluster”.

Smart Specialisation

- In Skåne cluster organisations are involved in the development of the S3 & priority areas are based on existing business clusters in the region.
- Skåne’s Innovation Strategy for Sustainable Growth identifies 6 priority areas.





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COFFEE BREAK

