



ANALYSIS OF THE SURVEY AMONGST THE ECCP PROFILED CLUSTER ORGANISATIONS

August 2019

Introduction and respondents

At the request of the European Commission and EASME, the European Cluster Collaboration Platform (ECCP) invited the profiled cluster organisations to a fourth survey related to their activities and interactions with the European Cluster Collaboration Platform. The main aim of this survey was to check once again the users' interaction and satisfaction with the ECCP and enable the ECCP Team to offer a better service to the cluster organisations and to put in place activities that will help them support and deliver their cluster objectives.

The survey was sent out to 884 profiled cluster organisations in May 2019. It should be noted that only 242 complete questionnaires were considered in this analysis (in July 2018, the survey had received 200 responses). Among the 242 respondents, 200 completed the survey entirely and 42 partially.

The survey was launched on May 14th, 2019 and stayed open until July 1st, 2019. Reminders were sent on May 27th and June 17th, 2019.

As the ECCP as it exists today will be soon revamped, the feedback collection of the clusters registered on the platform is essential to shape future activities and adjust the services offered to the users.



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1. General information about the respondents

All 242 cluster organisations provided the basic information regarding: the respondents' names, the organisations' names and the e-mail contact. Each cluster also answered the question regarding their cluster's age. They were asked if their cluster is less than 1 year old, between 1-5 years old, or more than 5 years old.

In the graphic below the age distribution among respondent clusters is shown. The rate of more than 5 years old clusters (72%) has decreased since the last survey in 2018 (when the rate was of 74%). This suggests a relative stability in the age profile of registered clusters. Only 3 respondent clusters were less than one year old.

CLUSTER ORGANISATIONS' AGE

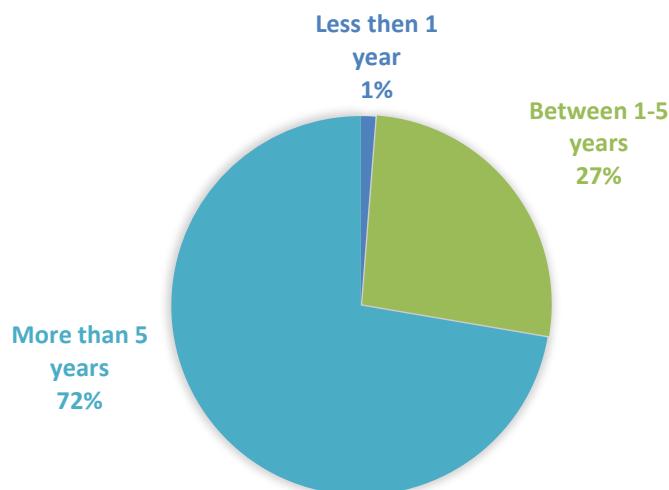


Figure 1 Cluster organisations' age

2. Analysis of the data provided through the answers to the survey questions

2.1 Q1. For which purposes do you use the ECCP?

The totality of respondent clusters answered this question¹. The graphic below presents the main reasons why the organisations are using the ECCP. 185 clusters mainly use the platform to have access to **cluster-related calls information** (76%). This main purpose is followed by "to learn about or to **participate in cluster matchmaking opportunities**" (73%) and **search of cooperation partners** (73%), of **cluster-related news** (72%) and **events** (69%).

¹ This question is a multiple-choice question.

Purposes for using the ECCP Platform

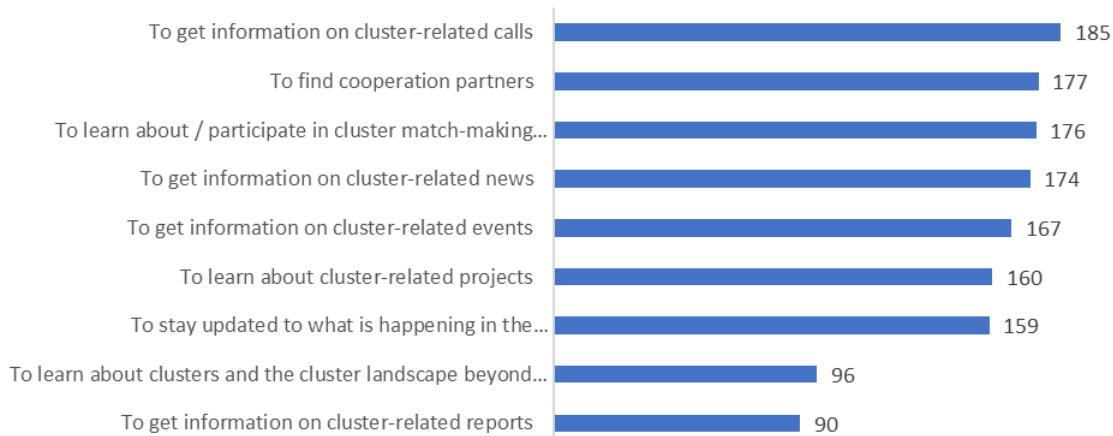


Figure 2 Purposes for using the ECCP

2.2 Q2. How often do you visit the ECCP?

Most respondents use it **2-3 times a month** (64 respondents, 27%), followed by those who use it **once a week** (56 respondents, 23%) or **once in a month** (50 respondents, 21%). Compared to 2018, the visit frequency has dropped, since in July 2018 35% answered that they used the platform once a month or once in a while, and in July 2019 this number has increased to 38% (21% use it once a month and 17% once in a while)².

² Only one cluster did not answer this question (the response rate was not affected, being equal to 99,6%).



Frequency of visits on the ECCP

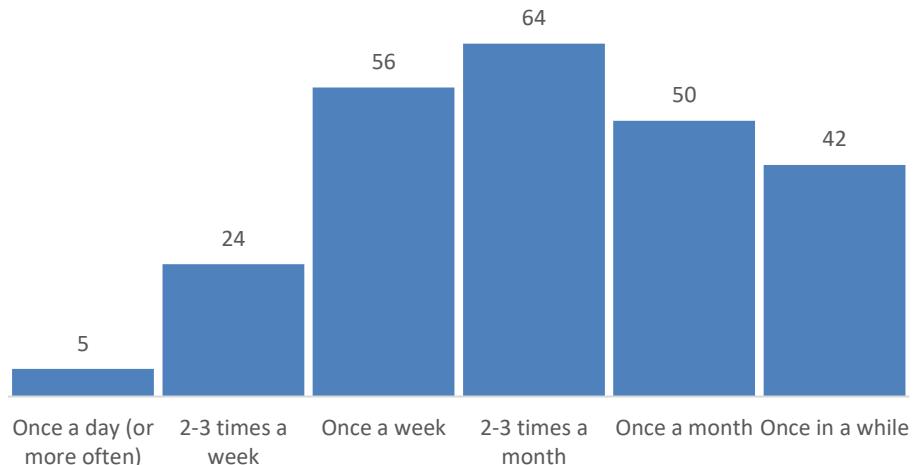


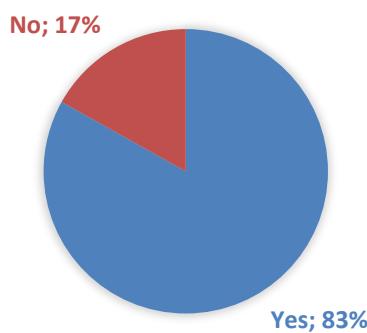
Figure 3 Frequency of visits on the ECCP platform

2.3 Q3. Did you subscribe to the ECCP weekly digest and/or promotional newsletter?

From 2018, a minor increase of subscriptions can be seen, since 187 organisations answered positively (compared to 182 in July 2018)³. The rates are presented in the graph below.

Figure 4 Subscription to Newsletter

SUBSCRIPTION TO NEWSLETTER



³ The answer rate to this question was of 93% (225 answers received).

2.4 Q4. Your cluster profile is published on the ECCP. Do you make use of the possibility to upload news/events/documents on your cluster organisation profile?

Among the respondents, 127 said that they upload content on their cluster profile, a rate of 53% (considerably inferior to last year's rate of 91% - 182 cluster organisations)⁴. It is difficult to understand why this figure has changed so much and perhaps it could be the focus of a future webinar. One explanation could be that in 2018, the ECCP introduced a new feature in the cluster profiles, allowing them to display information their start-up ecosystem. The introduction of this new feature was followed by incitation to encourage cluster organisations to upload their profile.

NEWS, EVENTS, DOCUMENTS UPLOAD ON CLUSTER PROFILE

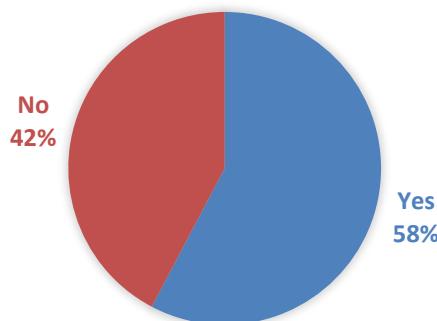


Figure 5 News, events, documents upload on cluster profile

2.5 Q5. When was the last time you updated your profile (upload of news/events, changes of contact data, number of members, etc)?

Among the respondents, 63 clusters (27%) have updated their profile in 2019. Compared to 2018, when 112 organisations (56%) had updated their profile in the same year, a decrease of this initiative is visible. Most respondents last updated their profile in 2018 (39% corresponding to 93 of respondents).

⁴ 220 of the 242 respondents answered this question (response rate of 91%).

Some respondents said that they have not yet updated their profile but that they will do it within the next three months (20 respondents, 8%), when relevant changes occur (15, 6%) or by the end of the year (9, 4%). The updating of profiles is a challenge faced by many such platforms and can be influenced by many factors, such as changing staff and cluster staff turnover related to ECCP related tasks.

The graphic below presents the results⁵:

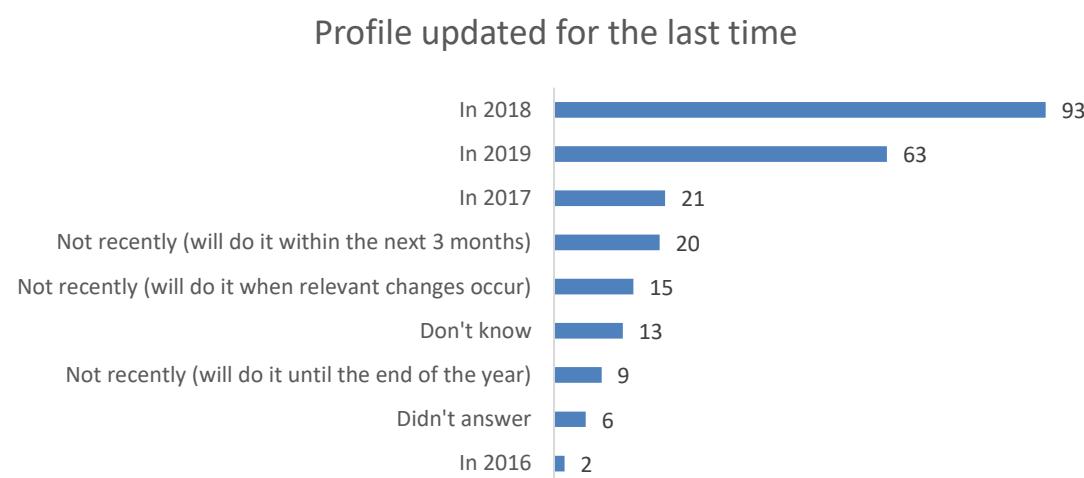


Figure 6 Profile updated for the last time

2.6 Q6. Do you use the Partner Search facility of the ECCP?

As presented in the graph below, among the respondents, 57% use the Partner Search facility (corresponding to 114 organisations)⁶. This number has increased compared to 2018, when 51,5% clusters said they used the tool.

We think that the term “use” was perhaps misleading: while we understand rather an active intervention (like posting or reacting to a post), it looks like the users understand rather as “checking the page”, as the high numbers are contradictory to the reality. It should be noted that the use of the tool rose while the Cluster Excellence Call (COS-Cluster-2018-03-02) was open, with 11 searches related to the constitution of consortium to build proposals. Our discussions with cluster organisations suggest that this partner search is equally important enabling clusters to have a more “private” search and then engage with direct/bilateral exchanges rather than posting a search request.

⁵ The response rate to this question was high (98%).

⁶ 42 cluster organisations did not answer this question (response rate of 83%).

The fact that between 14.11.2018. – 30.03.2019 there were no direct search requests or items posted, the results are to be treated with care. It also raises the question mark for us – what happens if for longer periods of time users visit the page and see it empty? A solution could be to find ways to engage with clusters and encourage them to publish and have good examples that can be promoted and raise awareness on the feature via the ECCP Digest/Newsletter.

PARTNER SEARCH FACILITY USE

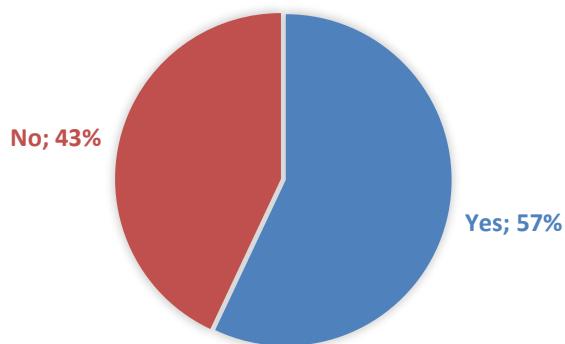


Figure 7 Partner Search facility use

For those who responded negatively, they were asked the reason why, which is presented below after a qualitative grouping of the provided answers. 59 respondents (69% of those who said they did not use the tool) explained the reason why. Most of them (37%) replied that they did not need this tool for many different reasons (some are not searching for partners, others simply said that the demand has not yet emerged). 22% of them said they prefer other forms of contact with partners, specially through their network or via direct e-mail. 11 respondents said the reason why they are not using the facility is because they do not know how to use it or do not know it exists. Other answers were lack of time, lack of capacity, lack of good matchmaking results.



Reason why the Partner Search facility is not being used

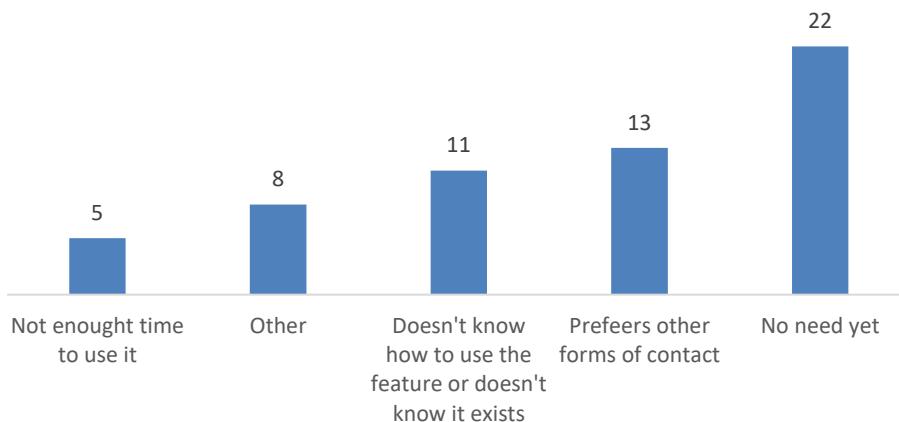


Figure 8 Reason why the Partner Search facility is not being used

For those who responded positively, we asked the following question:

2.7 Q7. Do you post your offers and demands?

92% of organisations that said they are using the facility answered this question. Among the 105 respondents, 42 (40%) said they post offers and demands on the facility, while 63 (60%) do not. Between 2018 and 2019, the number of organisations using the tool to post offers and demands has strongly increased up to 50%⁷. This increase can be explained by the publication of several EU calls targeted by clusters organisations, such as the INNOSUP call (INNOSUP-01-2018-2020) and Cluster Excellence Call (COS-Cluster-2018-03-02).

⁷ In 2018, out of 103 cluster organisations using the partner search tool, 29 indicated that they posted offers and demands.



OFFERS AND DEMANDS POSTING

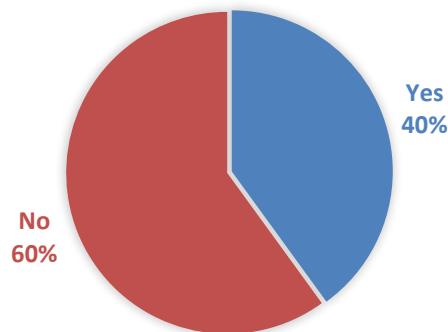


Figure 9 offers and demands posting

2.8 Q8. We would very much like to learn why not in order to adapt it to your needs.

Nonetheless, when asked to present the reason why they were not posting offers and demands, the answers were very similar to the ones given by those who said the facility has never been much used.. It seems that those who have never used the tool and those who do not publish anything are having the same impressions: the **lack of need** (7 respondents), the preference for **other forms of contact** (8 respondents) and the **lack of knowledge regarding the use of the facility** (6 respondents).

Reason why clusters are not posting offers and demands on the Partner Search facility

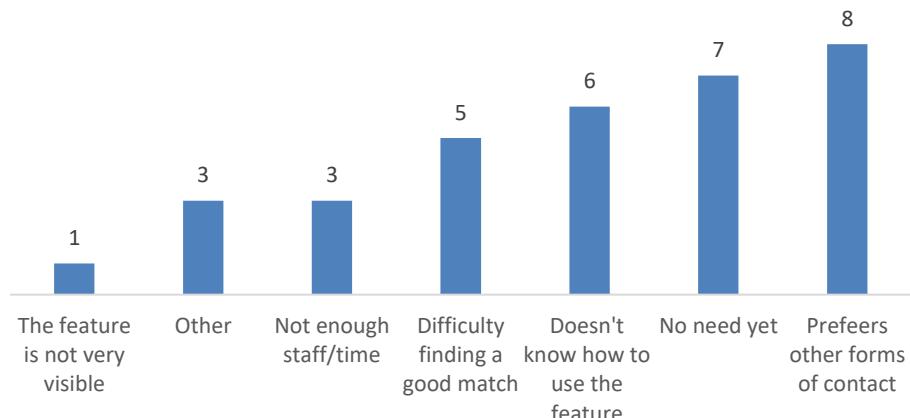


Figure 10 Reason why clusters are not posting offers and demands on the Partner Search facility (numbers of respondents)

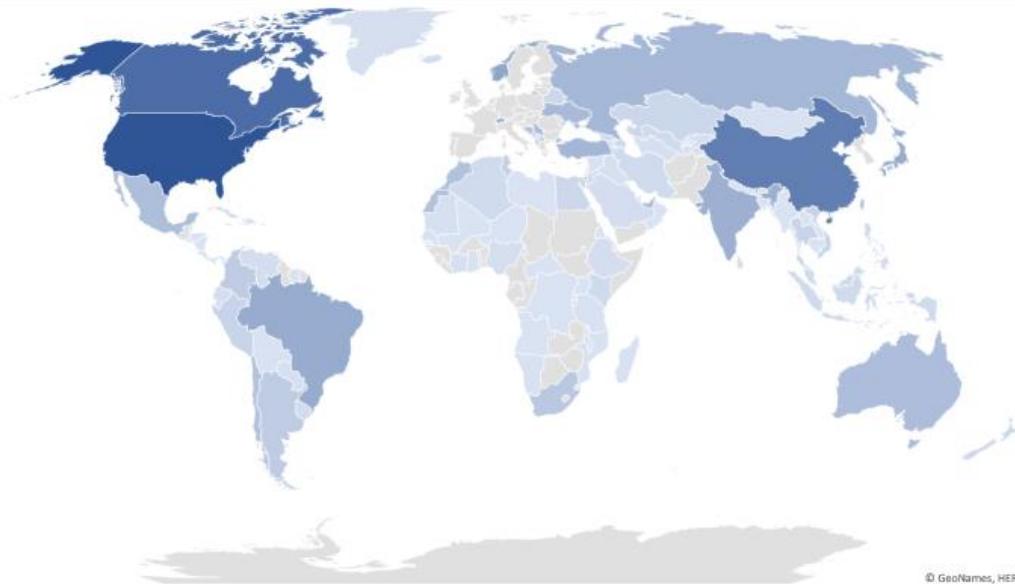
Other reasons for not publishing offers and demands are: lack of time and staff, difficulty to find good matches, absence of clusters with a specific profile searched for, too many non-relevant profiles and troubles with the filter.

These qualitative responses should be taken into account when planning the future work of the ECCP team - both regarding the web platform maintenance and development and regarding improving the search tool in case under consideration of the constraints of the given resources.

2.9 Q9. Which countries beyond Europe do you target for international cooperation?

The response rate for this question was of 100%⁸. This in itself is a good indicator of why users come to the ECCP. The countries that were mentioned by respondents are presented in the graph below and the intensity of the blue indicates the frequency of appearance.

⁸ This question is a multiple-choice question.



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Figure 11 Countries outside the EU for cooperation

It should be noted that the list of countries available for selection as responses to this question included all countries beyond the EU-28 Member States. The answers show interest in collaboration with both “third countries” and “COSME” countries.

The top 10 targeted countries by the cluster organisations are listed below. Furthermore, the strategic third countries for cluster cooperation identified by the European Commission⁹ (all identified in bold) that did not appear among the 10 first are also listed below with the number of times they were mentioned:

⁹ The full list can be found here: <https://www.clustercollaboration.eu/news/eu-commission-launches-23-new-european-strategic-cluster-partnerships-go>

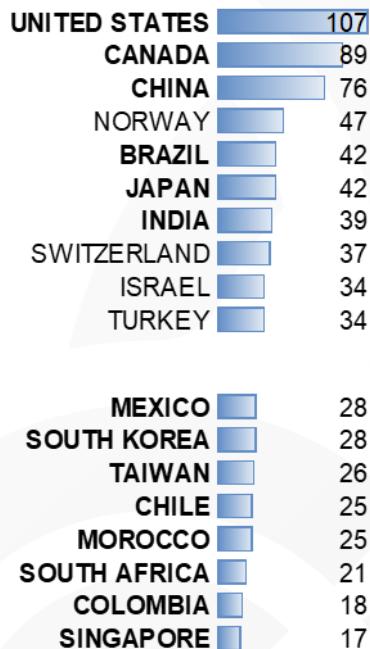


Figure 12 Ranking of countries outside the EU for cooperation

The countries targeted by cluster organisations for international cooperation are relatively in line with the strategic countries co-identified by the European Commission and the ECCP team in phase 1 and 2, especially for the top selected countries (USA, Canada, China, Brazil, Japan, India and Israel). Cluster organisations also seem particularly attracted to collaboration with cluster organisations located near the European Union, such as Norway, Turkey, and Switzerland.

2.10 Q10. Do you cooperate with clusters from countries outside the EU?

Out of the 200 received answers, 100 (50%) participants stated that they have already initiated cooperation with clusters from countries outside the EU and 96 (48%) that they did not.

This ratio is somewhat surprising (when comparing to answers to other questions of the survey) and the ECCP team will further investigate on the reasons for this high percentage of cluster organisations with no experience in international cooperation. However, we see quite often in the profile validation process that there is “no interest” in international cooperation selected. Internationalisation activities depend much also on the maturity of the cluster organisation and the ecosystem in which they operate and especially if internationalisation beyond Europe is part of the strategy or not.

INTERNATIONAL COOPERATION

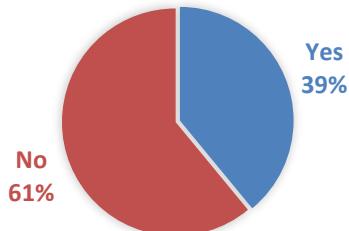


Figure 13 International cooperation

2.11 Q11. Please provide the cluster name and country and how the cooperation is carried out;

Ongoing international cooperation

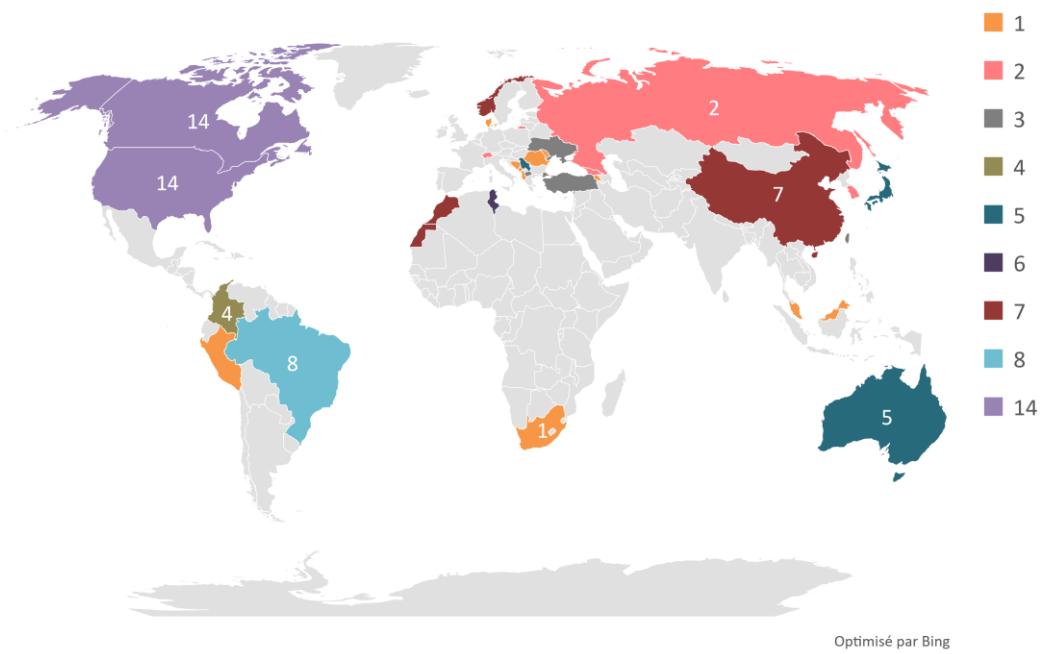


Figure 14 Ongoing international cooperation

Respondents provided the name of the international partner clusters and their country of origin. Presented below are the clusters separated by continents. For those in which more detail regarding the cooperation was given, a small description follows the tables.

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EU Cluster Name	Partner Country	Partner Cluster
SWHEC	Morocco	CE3M Cluster of Electronics, Mechatronics and Mechanic of Morocco
Cluster Eco-construction		Cluster eco-construction Marrakech
Catalan Water partnership		Morocco Denim
Images é & Reseaux		Maroc Numeric Cluster
Terralia		Cluster Booster Track (initiative THE NEXT SOCIETY)
AEI TÈXTILS		C2TM
Cluster of Bioenergy and Environment of Western Macedonia (CluBE)	South Africa	Green Cape
bioPmed Cluster / Bioindustry Park	Tunisia	BiotechPole
bioPmed Cluster / Bioindustry Park		CBS Sfax
Cluster AGRIFOOD Piedmont Regione - MIAC Scpa		Pôle de Compétitivité de Bizerte
AgroTransilvania Cluster		Pôle de Compétitivité de Bizerte
Tuscany Technology Cluster for Energy and Green Economy (DTE ² V)		Pôle Industriel et Technologique de Gabes
UP-tex		MFC Pôle

Table 1 International cluster cooperation: Africa

 The Catalan Water partnership and Morocco Denim are cooperating with the Next Society project, while the Cluster of Bioenergy and Environment of Western Macedonia (CluBE)'s partnership with Green Cape in South Africa is focused on the International Cleantech network. The European bioPmed Cluster / Bioindustry Park developed a Collaboration with BiotechPole and CBS Sfax in Tunisia towards projects, consultancy and exchange of information. Cluster AGRIFOOD Piedmont Regione - MIAC Scpa is cooperating with Pole de Compétitivité de Bizerte for matchmaking opportunities and international R&D projects. Some of the examples illustrate the role played by "facilitator projects" such as Next Society.



A cooperation agreement was signed between AEI TÈXTILS and C2TM (Morocco) and a mentorship programme for cluster managers is being developed between Cluster Terralia and Booster Track.

EU Cluster Name	Partner Country	Partner Cluster
bioPmed Cluster / Bioindustry Park	China	Juke Biotech Park
bioPmed Cluster / Bioindustry Park		FengLin Group
bioPmed Cluster / Bioindustry Park		BioBay
bioPmed Cluster / Bioindustry Park		BioLake
BioM Biotech Cluster Development GmbH		Fenglin Group Shanghai Science Park



Wagralim		Food Valley China
Organic Electronics Saxony (OES)	Japan	YU-FIC
bioPmed Cluster / Bioindustry Park		Osaka Hokkaido Cluster
BioM Biotech Cluster Development GmbH		Osaka BioHeadquarters
BioM Biotech Cluster Development GmbH		Kawasaki City
UP-tex		JCFA
OSTIM Rubber Technologies Cluster	Malasia	Malasian rubber board
BioEconomy Cluster Germany	Shanghai	SARI
BioM Biotech Cluster Development GmbH	South Korea	Incheon Free Economic Zone
ROVEST Cluster	Taiwan	TAIA
UP-tex		TIPO
TOOLAS		Taiwan laser technology application association
Cluster of Applied Earth Science	Turkey	JESDER
ASICE		Ostim

Table 2 International cluster cooperation: Asia

 Thanks to the BioXclusters Alliance (bioPmed Cluster / Bioindustry Park, Italy), there has been a cooperation with Juke Biotech Park, FengLin Group, BioBay, and BioLake from China regarding the support to companies. BioM Biotech Cluster Development GmbH from Germany has also signed a cooperation agreement for SME support with the Fenglin Group Shanhai Science Park.

 Finally, a joint participation in GeoEnergy Europe metacluster partnership between JESDER (Turkey) and the Cluster of Applied Earth Science is in place.

 Among Japanese clusters, a cooperation agreement and joint R&D projects is in place between Organic Electronics Saxony and YU-FIC. The Osaka Hokkaido Cluster is involved in events and support to companies' activities while the Osaka BioHeadquarters has signed a cooperation agreement for SME support and joint EU-Japan partnering event with BioM Biotech Cluster Development GmbH. The German cluster has also signed a cooperation agreement with Kawasaki City in Japan and Incheon Free Economic Zone in South Korea.

The above examples illustrate the important role played by ESCP Go International partnerships.

EU Cluster Name	Partner Country	Partner Cluster
ICT Cluster of Central Serbia	Albania	AITA
TRANSYLVANIAN MECHANICAL ENGINEERING CLUSTER	Armenia	Green Energy cluster
Romanian Cluster PROECO-CBRNE	Bosnia and Herzegovina	



Silesian Aviation Cluster	Georgia	The International Centre for Social Research and Policy Analysis (ICSRPA)
Oy Merinova Ab		Georgian Turism Association
ICT Cluster of Central Serbia	Island	Off-shore and maritime clusters
Crnogorski IT klaster	Montenegro	Montenegrin ICT Cluster
ICT Cluster of Central Serbia	North Macedonia	MASSIT
Smart Housing Småland		MASIT
Cluster of Bioenergy and Environment of Western Macedonia (CluBE)	Norway	Arena Skog
bioPmed Cluster / Bioindustry Park		Nordic Edge
bioPmed Cluster / Bioindustry Park		Digital Norway
Oy Merinova Ab		Norway Health tech
Green Energy Innovative Biomass Cluster		Off-shore and maritime clusters
Fórum Oceano		OREEC
Green Energy Innovative Biomass Cluster		GCE Ocean Technology
Cluster Sofia Knowledge City	Republic of Moldova	Energy and Biomass Cluster
SWHEC	Russia	Cluster House
TRANSYLVANIAN MECHANICAL ENGINEERING CLUSTER		Cluster of Automotive Industry of Samara Region
COMET - Cluster della Metalmeccanica FVG	Serbia	AC Serbia
3D grupa - 3D technologies cluster		Automobilski klaster Serbia (AC Serbia)
Green Energy Innovative Biomass Cluster		Automotive cluster
Automotivest		Ecopanonia Cluster Serbia
Cluster of Bioenergy and Environment of Western Macedonia (CluBE)		Serbia Automotive Cluster
bioPmed Cluster / Bioindustry Park	Switzerland	CleantechAlps
Oy Merinova Ab		BioAlps
ArchEnerg Cluster		Precarpatian Cluster
UNIMOS (AgroBioCluster)		Precarpathian eco-energy cluster
ICT Cluster of Central Serbia	Ukraine	Ukrainian Organic Cluster
TRANSYLVANIAN MECHANICAL ENGINEERING CLUSTER		Network cluster
Romanian Cluster PROECO-CBRNE		Ukrainian Organic Cluster

Table 3 International cluster cooperation: Europe

 With the International Centre for Social Research and Policy Analysis (ICSRPA) in Georgia, the Romanian Cluster PROECO-CBRNE is exchanging information on possible collaboration in scientific projects. Also in Georgia, the Silesian Aviation Cluster is collaborating with the Georgian Tourism Association to exchange information about offers or needs of the clusters members, about possibilities of taking part in local and international projects and



programs, about training, conferences, seminars or cooperation days, as well as to jointly organize economic missions.

The ICT Cluster of Central in Serbia is engaging in GIVE projects and 3B ICT Networks with MASSIT in Northern Macedonia, AITA in Albania and STIKK in Kosovo. An International Cleantech Network is being developed between Nordic Edge in Norway and the Cluster of Bioenergy and Environment of Western Macedonia (CluBE).

IN Norway, Digital Norway and Norway Health tech are cooperation towards information exchange and in projects with bioPmed Cluster / Bioindustry Park. Many joint projects are taking place with, for example, Off-shore and maritime clusters in Norway, Energy and Biomass Cluster in Republic of Moldova and with Ecopanonia Cluster Serbia in Serbia.

Green Energy Innovative Biomass Cluster has initiated joint projects with the Energy and Biomass Cluster in Republic of Moldova, while in Russia the Cluster of Automotive Industry of Samara Region has joint with SWHEC in a Machine-building Association. Oy Merinova Ab is collaborating with the Precarpatican Cluster in Ukraine on project proposals and staff exchange.

EU Cluster Name	Partner Country	Partner Cluster
Lombardy Energy Cleantech Cluster	Canada	Écotech Québec
Clust-ER Agrifood Emilia-Romagna Region		Protein Industries
Greenport West-Holland		Cluster
Cluster of Bioenergy and Environment of Western Macedonia (CluBE)		Écotech Québec
bioPmed Cluster / Bioindustry Park		ToHealth
BioM Biotech Cluster Development GmbH		TOHealth
Creative Factory by SAMOA		Partenariat du Quartier des Spectacles
Cluster Eco-construction		Creneau eco-construction
UP-tex		Creneau Accord
Fórum Oceano		Ocean Advance Canada
Wagralim		Natural product Canada
Wagralim		St Hyacinthe
Wagralim		Créneaux d'excellence Accor
Images é & Reseaux		Le Cinq
BALTIC SEA & SPACE CLUSTER	USA	Iostia
CenSec		JARI
Cluster of Bioenergy and Environment of Western Macedonia (CluBE)		Research Triangle Cleantech Cluster
bioPmed Cluster / Bioindustry Park		Medical Alley
BioM Biotech Cluster Development GmbH		Wistar Institute
Midlands Aerospace Alliance		Aerospace Component Manufacturers



AMEC		Textile associations
Pôle Mer Méditerranée		Maritime cluster of San Diego
Fórum Oceano		The Maritime Alliance
Catalan Water partnership		Water council
Wagralim		Chicgoland
Wagralim		Milwaukee
Marine South East		The Maritime Alliance

Table 4 International cluster cooperation: North America

 In Canada, Protein Industries are collaborating with Clust-ER Agrifood Emilia-Romagna Region in the topics: a) Recovery and re-use of both animal and vegetable by-products and waste in order to recover the protein fraction and transform it (via technological/biotechnological platforms) into food, feed or biomaterials; b) Assessment of the nutritional value and functionality of the products obtained; c) Analysis of the possibility of using vegetable by-products to grow insects from which to obtain animal-type proteins; d) Allergenic activities of some vegetable proteins, as well as the ""toxicity or immunogenicity"" of peptides derived from gluten in the durum wheat cultivar; and e) The study of proteins as molecular markers of species (as an alternative to DNA).

 The TOHealth cluster in Canada has signed a cooperation agreement for SME support with BioM Biotech Cluster Development GmbH in Germany, while the Ocean Advance Canada has collaborated in participation in the international network through the Blue Tech Cluster Alliance with Fórum Oceano.

 In the USA, Iostia and the Baltic Sea & Space Cluster from Poland are working together in information exchange and knowledge transfer. The Research Triangle Cleantech Cluster and the Cluster of Bioenergy and Environment of Western Macedonia (CluBE) are both part of the International Cleantech Network.

 A MoU in the framework of the MAGIA project to offer support to companies has been developed between bioPmed Cluster / Bioindustry Park and the American cluster Medical Alley. Another MoU has been agreed upon the cooperation between Water council in the USA and the Catalan Water partnership. A cooperation agreement for SME support has been signed between the Wistar Institute and the BioM Biotech Cluster Development GmbH.

 Bilateral meetings for cluster member companies have been developed due to the partnership participation of Aerospace Component Manufacturers from the USA in the Midlands Aerospace Alliance. Moreover, an alliance has been built between the Maritime cluster of San Diego and EU maritime clusters. Finally, a MoU has been signed between the Water Council in the USA and the Catalan Water partnership.



EU Cluster Name	Partner Country	Partner Cluster
bioPmed Cluster / Bioindustry Park	Australia	Small technology Cluster
bioPmed Cluster / Bioindustry Park		Government of South Australia (Adelaide)
BioM Biotech Cluster Development GmbH		Health Industries South Australia
Oy Merinova Ab		Melbourne Institute of Technology
Cluster Sports and Technology		ASTN

Table 5 International cluster cooperation: Oceania

 Exchange of information and support to companies have been the object of the cooperation between the European bioPmed Cluster / Bioindustry Park and the Australian Small technology Cluster and the Government of South Australia – Adelaide. A cooperation agreement for SME support has been signed between Health Industries South Australia and BioM Biotech Cluster Development GmbH, and a staff exchange cooperation is being developed between the Melbourne Institute of Technology and Oy Merinova Ab.

EU Cluster Name	Partner Country	Partner Cluster
bioPmed Cluster / Bioindustry Park	Brazil	BioRio
bioPmed Cluster / Bioindustry Park		Biominas
bioPmed Cluster / Bioindustry Park		Fipase
Creative Factory by SAMOA		C.E.S.A.R
Creative Factory by SAMOA		Porto Digita
Wagralim		Agropolo
Wagralim		Fiep Parana
MetaIndustry4	Colombia	Cluster metalmecánico Atlántico
Basque Energy Cluster		Cluster Eléctrico de Medellín
Catalan Water partnership		Acoda
Catalan Water partnership		Network cluster
ZINNAE	Peru	Centro de Competencias del agua

Table 6 International cluster cooperation: South America

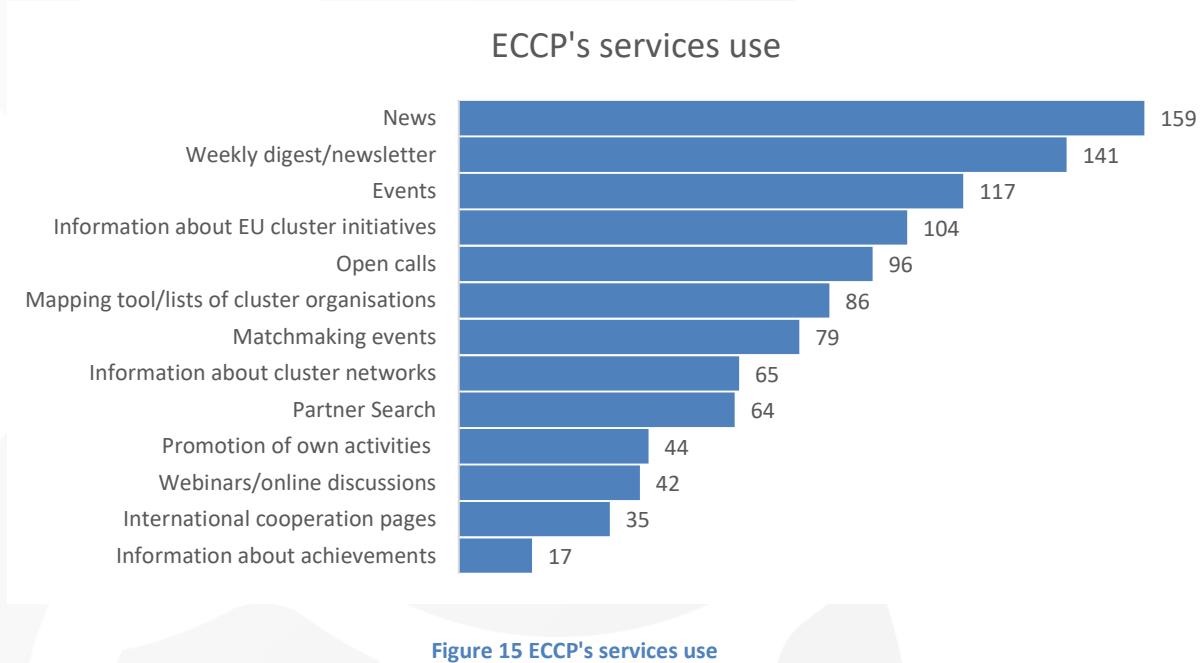
 Three Brazilian partners (BioRio, Biominas and Fipase) are collaborating with bioPmed Cluster / Bioindustry Park regarding information exchange and mutual support to companies. In Colombia, the Catalan Water partnership has found two partners: Acoda with which a MoU has been signed; and the Network cluster, with which meetings in Colombia have been planned.

 Also in Colombia, the Cluster Eléctrico de Medellín has been cooperating with the Basque Energy Cluster in business outgoing and incoming missions. Finally, in Peru the Centro de Competencias del Agua has joint forces with ZINNAE to collaborate in a training program

designed to provide trainers and help with the organisation of a training activity thought by the Peruvian centre.

2.12 Q12. Which of the ECCP services/offers have you used during the last 6 months?

Among all 242 respondents, 159 stated that, in the last 6 months, they have used the News service in the ECCP Platform¹⁰. 141 said they profited from the weekly digest/Newsletter and 117 benefited from events organised by the ECCP. The most used services are the same as they were in 2018. All answers are presented in the graph below. These results support the need for a proactive news and events animation strategy both generated by the animation team but also by encouraging the users themselves.



2.13 Q13. Please assess the QUALITY of information/services provided by ECCP.

In the sequence, respondents were asked to evaluate the quality of the services provided by the ECCP on a scale from 1 to 4 (1 = poor, 2= good, 3= very good, 4=excellent).

All the services qualitative evaluation graphs are presented below. It is important to note that the response rate in this section of the questionnaire was relatively low compared to the rest of

¹⁰ This question is a multiple-choice question.

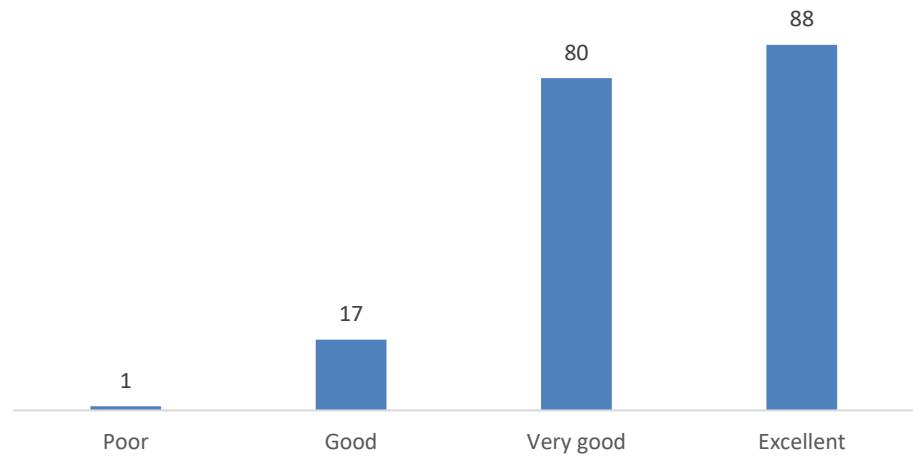
the survey. Nevertheless, amongst those who gave their feedback on the services, the average of “very good” and “excellent” was of 86% in the combined answers for all services¹¹.

¹¹ Rate of “very good” and “excellent” answers in every category: News : 90%; Event:93%; Weekly digest/Newsletter: 88%; Open calls: 86%; Mapping tool/List of cluster organisation: 86%; Matchmaking events: 90%; Webinar/online discussions: 79%; International cooperation pages: 79%; Partner Search: 82%; Information about EU cluster: 90%; Information about achievements: 85%; Information about Cluster Network: 87%



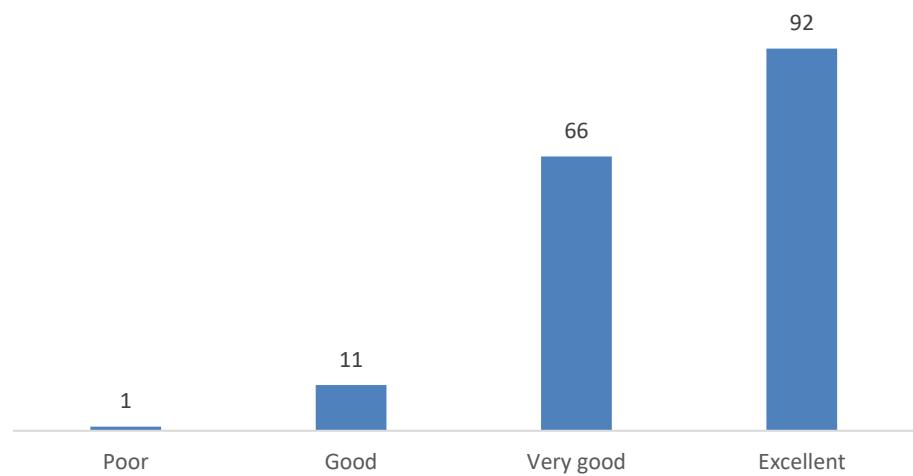
A [Quality of news] (186 answers received, i.e. 77%) and shows very good satisfaction rates.

News



B [Quality of events] (170 answers received, i.e. 70%) again with a very good satisfaction rateand co-incides with the results obtained during the ECCP matchmaking events.

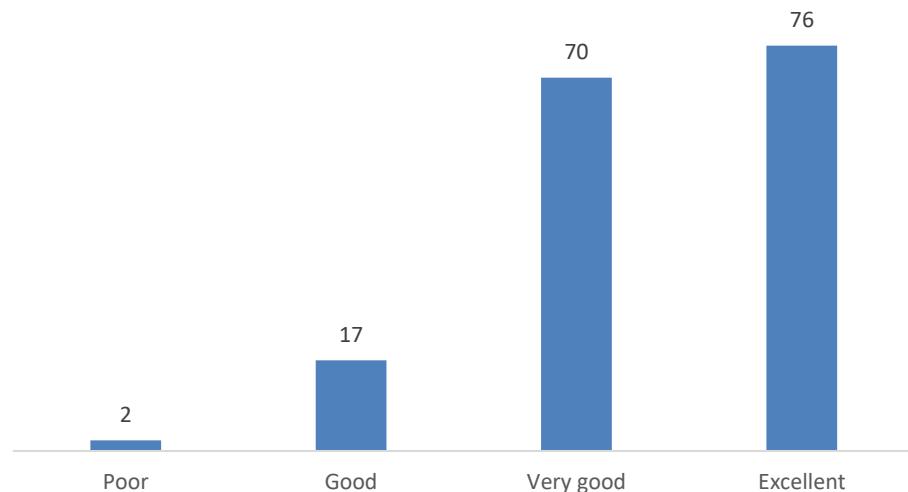
Events





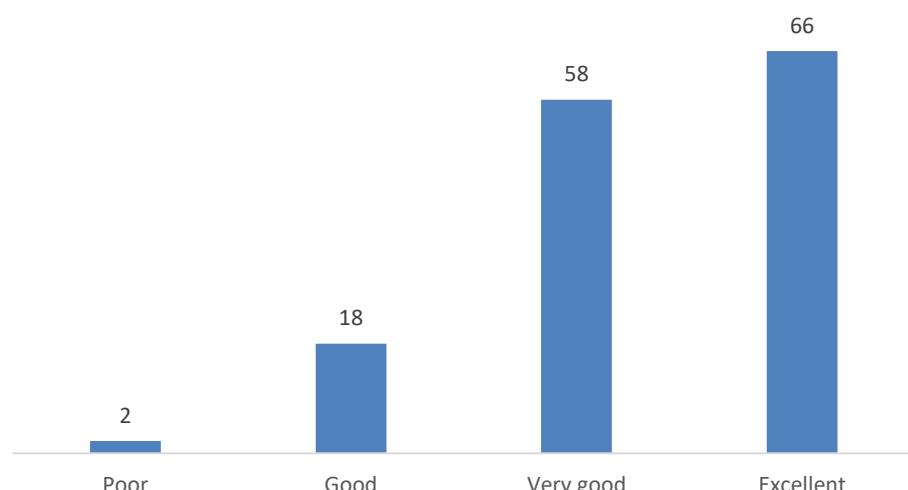
C [Quality of Weekly digest/Newsletter] (165 answers received, i.e. 68%), a good performance but with some scope for improvement.

Weekly digest/Newsletter



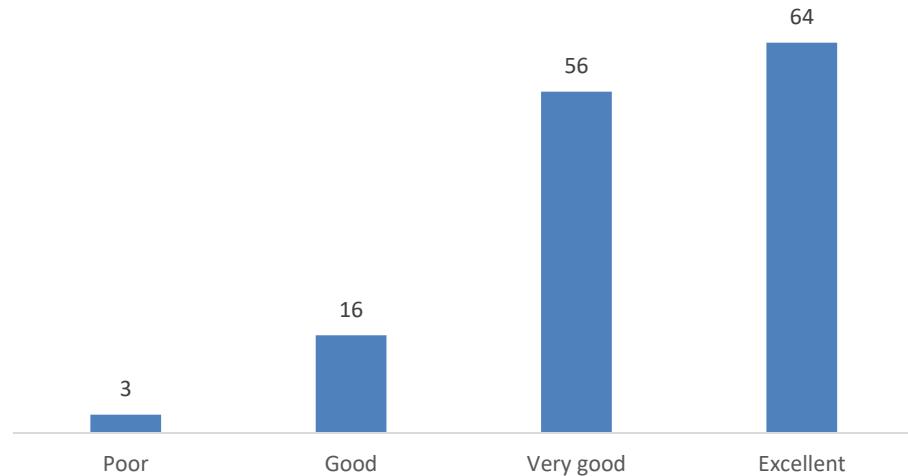
D [Quality of Open calls] (144 answers received, i.e. 60%), again good feedback but the content is independent of the work of ECCP as the platform merely presents the activities of others.

Open calls



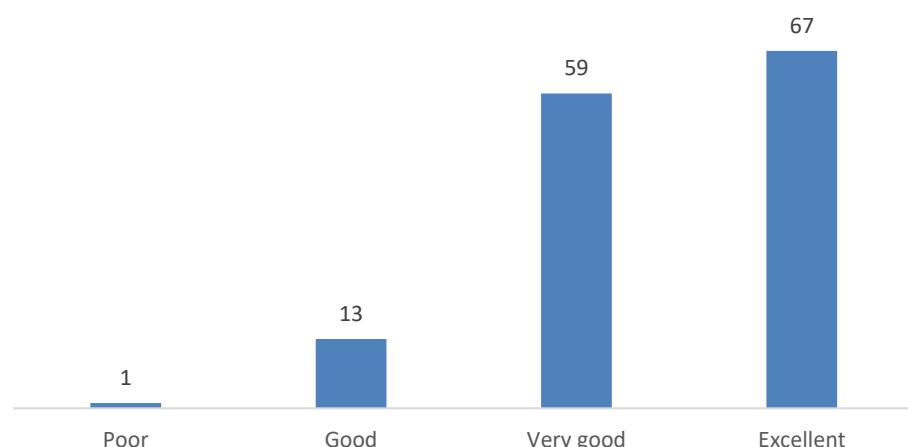
E [Quality of Mapping tool/Lists of cluster organisations] (139 answers received, i.e. 57%), fewer answers received but still a good service feedback.

Mapping tool/Lists of cluster organisations



F [Quality of Matchmaking events] (140 answers received, i.e. 58%), illustrating a high satisfaction with events directly organised by the ECCP team or their partners.

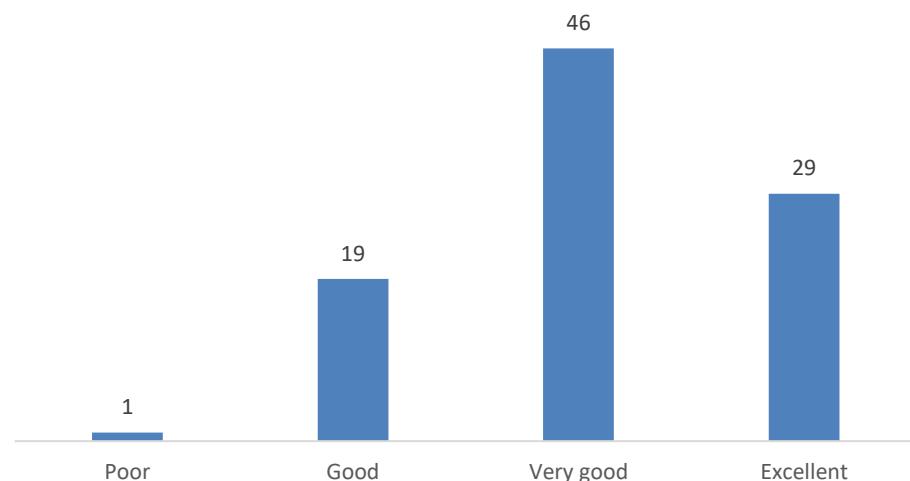
Matchmaking events





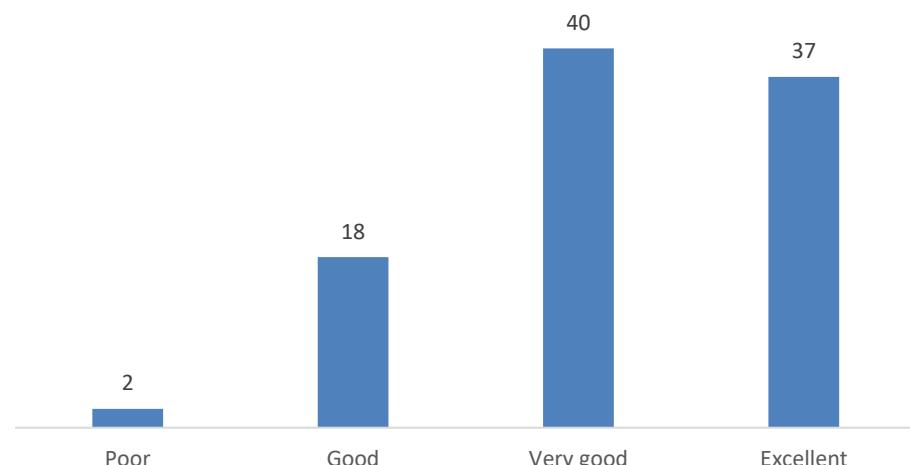
G [Quality of Webinars/online discussions] (95 answers received, i.e. 39%), a low overall response rate, but indicative of the relatively few webinars/participants and an shift from excellent to very good as the predominant answer.

Webinars/online discussions



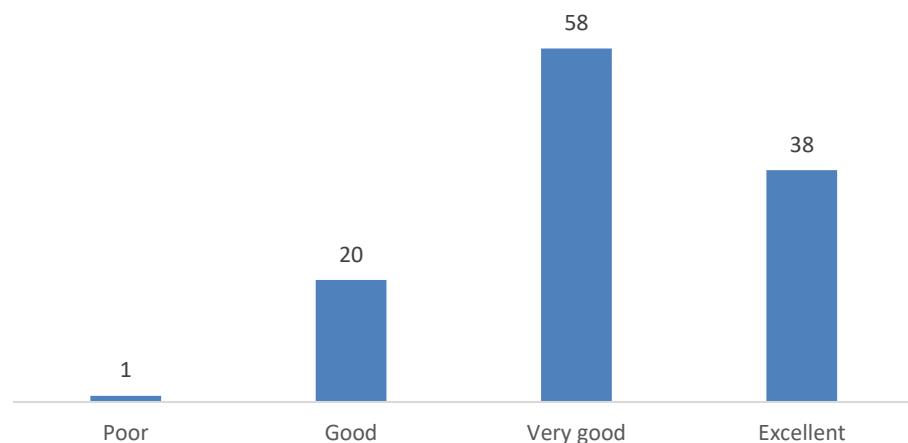
H [Quality of International cooperation pages] (97 answers received, i.e. 40%), showing fairly even answers but overall fewer respondents and more very good/good answers as opposed to excellent.

International cooperation pages



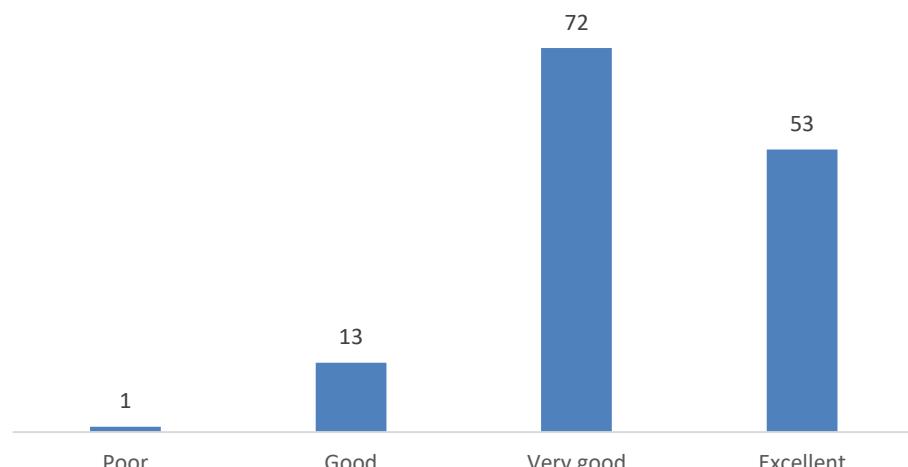
I [Quality of Partner Search] (117 answers received, i.e. 48%), although very good answers predominate it indicates that further progress can be sought in delivering this service.

Partner Search



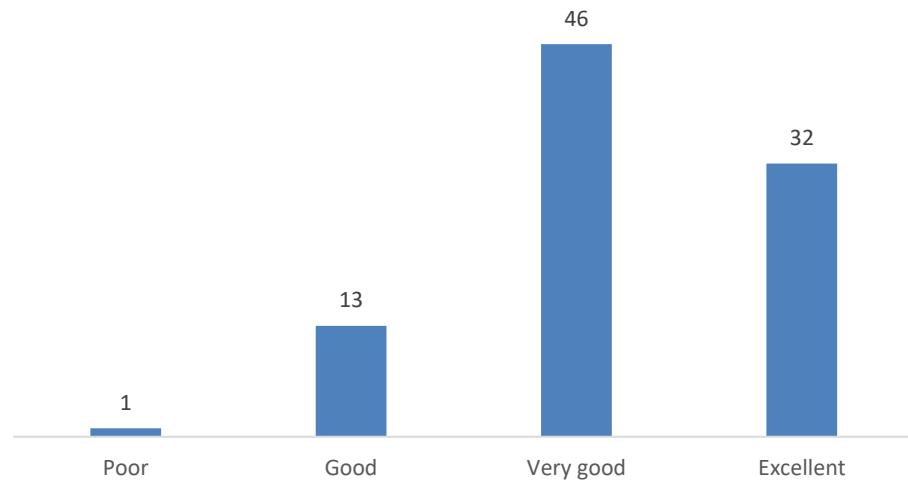
J [Quality of Information about EU cluster initiatives] (139 answers received, i.e. 57%)

Information about EU cluster initiatives



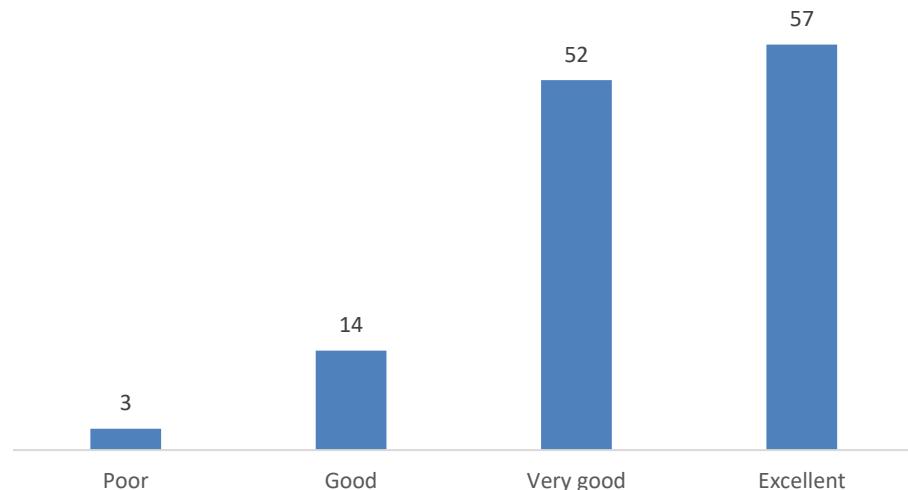
K [Quality of Information about achievements] (92 answers received, i.e. 38%)

Information about achievements



L [Quality of Information about Cluster Networks] (126 answers received, i.e. 52%); illustrating that the efforts to present and grow this part of the ECCP service offer is appreciated by users.

Information about Cluster Networks



2.14 Q14. How many companies from your cluster organisation directly/indirectly benefitted from the ECCP support actions?

66% of respondents (160 in total) answered to this question. Among them, the majority said that less than 50% of the companies in their cluster organisation benefited from the ECCP

support actions. Only 10 respondents said that more than 50% of them were benefited, only 2 of them stating that this rate was superior to 80% in their clusters.

This low rate does not seem to have any connection with the average age of respondent clusters, since most of them are at least 5 years old. Further investigation needs to be done in order to understand the reason why clusters' companies are not directly benefitting from ECCP services. Potential answers concern perhaps the number of SME members that are indicated on the individual cluster profiles, or also on the type of events that are promoted (ie SME friendly etc). In all cases further efforts to address this issue need to be identified and suitable indicators proposed and shared with cluster organisations.

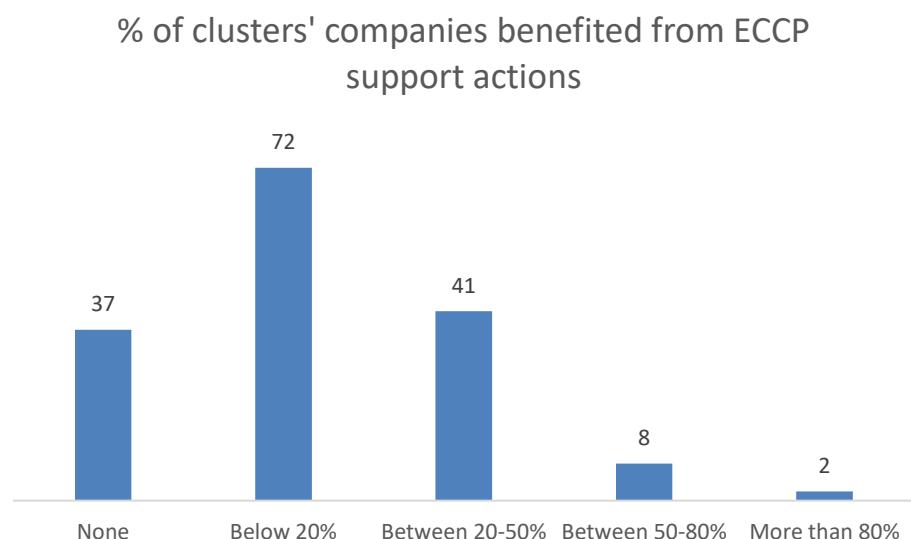


Figure 16: % of cluster's companies benefited from ECCP support actions

2.15 Q15. What other services/features would you like the ECCP to offer you?

39 respondents gave suggestions regarding the services or features they would like to have access to through the ECCP. In order to present the answers, they were divided into categories in order of frequency:

1. Sum up of offered services/events dates/open calls (6 times)
2. Good practices repository (6 times)
3. Cluster management training sessions (4 times)
4. Help understanding how to profit from the platform (3 times)
5. Events and news divided by sector (2 times)
6. More financial aid and calls (2 times)
7. More SMEs oriented projects (2 times)

Other answers that only appeared one time were: List of potential partners from targeted markets and their needs; More user-friendly platform; Mobile app with all relevant information; Useful documents templates (e.g. MoU); Online platform for MoU creation and signing; More devices for news' platform (e.g. Import videos, images); Better integration with social networks; More content to non-clusters companies; Shared project management training sessions; Help finding international partners; Improve interface and posting tool; Improve contact with tourism clusters; More flexible and large profile template; Online conferences.

By analysing the suggestions made and comparing them to previous questions regarding the use and the quality evaluation of the provided services, some preliminary ideas emerge. It seems that respondents are not very familiar with the whole ECCP platform service offer nor with the individual services provided. Amongst the suggestions made, a few are already being delivered by the ECCP, but it seems that these organisations are not able to find them and profit from them. Many of the suggestions could be achieved if clusters organisations were aware of the available tools and learnt how to navigate the ECCP services in order to take the best advantage from them. Further promotional efforts and guidance need to be offered to users but this type of response is not unusual in such type of surveys.

Nonetheless, some of the suggestions are not yet being developed by the ECCP and every feedback should be considered by its team in order to keep improving the provided services and to offer new ones to meet clusters organisations' current and evolving needs (to see full answers: Table 7 Suggestions to improve ECCP Services).

2.16 Q16. The ECCP team is at your service. How satisfied are you with the services provided by the ECCP team?



To this question, 192 respondents (79%) provided answers. Among them, only 5% are only partly satisfied with the ECCP's services, the rest of them being satisfied (62%) or very satisfied (33%), an overall figure of 95%.

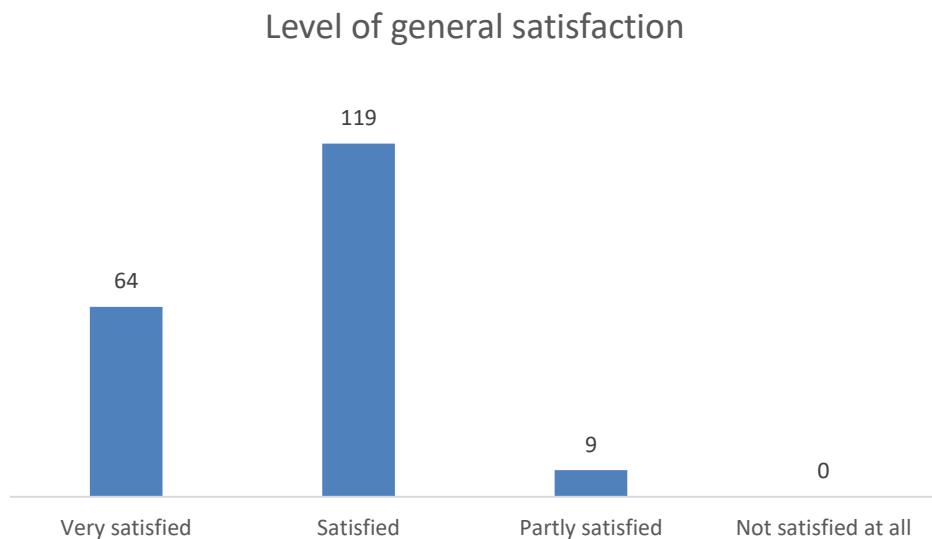


Figure 17 Level of general satisfaction

2.17 Q17. Can you please tell us more about what/how we can do to support you in a better way?

Three partly satisfied respondents gave suggestions to improve the service quality. The first one claimed to not have received any services from the team so far. It seems that this cluster is using other channels to receive information on clusters and disseminate information. The second respondent suggested that the ECCP should engage in active participation by providing project management support to some project initiatives.

The third organisation said that the information about the events was published too late in some cases and suggested that it would be better to publish the information about events at least 2 months before the event.

The ECCP team will analyse the responses above in more depth and see how improvements can be made within the constraints of resources and logistics' time.

Summary and suggestions to be considered in the future developments of ECCP

After collecting and analysing the answers provided by European clusters, we have summarised the information available to present the main aspects to be considered by the ECCP.

It should be kept in mind that despite the undoubted interest of the suggestions made by respondents only part of them have the potential for immediate implementation whilst others can be considered for a future development phase.

In the context of the revamping of the European Cluster Collaboration Platform, the users' feedback is essential to better evaluate their satisfaction on the current services offered by the ECCP, but also to better understand their needs. The comments provided by the users will support the future development of the platform to be better in line with the expectations of the cluster community. In the future the use of a regular "cluster sounding board" could help maintain a closer alignment with user needs and supplement the broader survey activities.

The survey was opened for one month and a half and two reminders were sent. Nevertheless, from the 884 contacted actors only 242 responses could be considered for analysis. Many respondents did not answer all questions, slightly compromising the accuracy of the statistical analysis.

- The first part of the survey is of great importance to map the respondents' profiles. Most respondents are not new clusters, meaning that they should be aware of the ECCP and its tools and taking advantage of them
- The following questions sought to analyse the frequency of use and the reason why respondents are engaging in the ECCP Platform. Amongst respondents, at least 83% use the ECCP Platform at least once in a month. These results are important because they are indicators of the nature of the use and the demand of users and they allow the ECCP to direct its efforts into satisfying them in a better way and create new demand among users.
- Regarding the service quality, most respondents believe that the tools provided by the ECCP Platform have a very good or excellent level of quality (86%). An important remark should be made at this point, given that these questions had a relatively lower rate of response. The reasons for such lower responses can be explained by the questions being in the end of the survey, lack of knowledge about the tools' and their use by respondents, etc.).
- Suggestions regarding the improvement of the Platform were also considered. Many of them are already being put in place by the ECCP, others need to be carefully analysed

and assessed in terms of budget and schedule constraints. Nonetheless, within the survey one aspect of the interaction between respondents and the platform is particular of interest : many clusters do not seem to know how to use all of the services it and are not aware of how to take the best advantages for them from the Platform. This has been evidenced by the lack of consistency in some answers (especially the use of the Partner Search facility) and suggestions made by respondents regarding facilities they wanted to see in the platform, but already exist (for example information about open calls, events and services).

- Regarding the use of the Partner Search tool, 57% of respondents said they are using the tool, although amongst those, 60% do not post offers or search for partner demands. Nevertheless, both non-users of the tool and users who do not engage actively have similar reasons for not profiting from the tool. They do not see the need to use the online tool because they have other preferable methods of finding partners, because they do not see the need of new partners or because they think the tool is not capable of finding the right match for them (or do not know how to use the tool). In the end, only 22% of respondents are actively engaging with the feature, which only compromises the benefits offered. The lower the number of engaged parties, the harder it is to find good matches, the greater the chances of people leaving the facility. The goal is to better understand users' needs and offer them a tool that corresponds to these needs. A suggestion is to broaden the aspects of the tool and not to limit it to the sole idea of a partner search, because many respondents are not keen to contact potential partners through this method. The tool could be developed further even to meet users demand of a good practices' repository. This could be a place where the exchange of information could be more efficient, but in order to do so, the link between the tool and "project partner" should be enhanced.
- International cooperation outside the EU has secured a very good response rate. The main targeted countries beyond Europe are: The United-States, Canada, and China. 61% of respondents have already initiated cooperation with clusters from countries outside the EU, especially in the USA, Canada, Brazil. These efforts are supported through the ESCP community and dedicated networks/projects.
- The users of the platform are also particularly interested in the sharing of good practices and success stories related to cluster management and internationalisation. They are also keen to have cluster management training sessions.
- It is interesting to note the expressed need for learning through the ECCP. The possibility to share success stories and good practices on the ECCP Platform is already given, but it

looks like the users are not always aware of it, as way to learn from each other and support knowledge exchange.

- The users of the platform also indicated that the platform should have a more prominent role in supporting not only clusters, but also SMEs, notably by encouraging the publication of information related to companies.
- Several users of the platform indicated that they would be interested to have the possibility to share the different material published on the ECCP (news, videos ...) through social media to enhance the visibility of the clusters.
- Overall, respondents are satisfied or very satisfied with the ECCP Platform (95%). This shows that, even though the Platform has room for improvement, it is already on the right way of providing clusters with the tool and resources they need in order to improve SME's activities and further support their membership..



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ANNEX I – Suggestions to improve ECCP services

Suggestion	Category
Calendar of all events - topic, venue, sector	Sum up of offered services/events dates/open calls
Explicit scouting of relevant calls, e.g. EU, Horizon2020, EASME, Interreg etc	Sum up of offered services/events dates/open calls
Maybe a sum up of all the services available. I feel we don't use ECCP as much as we could.	Sum up of offered services/events dates/open calls
Now we are showing colleague clusters that they can use the ECCP. It should be more well known. Make yourself more known	Sum up of offered services/events dates/open calls
short news about ECCP activities	Sum up of offered services/events dates/open calls
The information on cluster partnerships and calls should be more direct. Because sometimes is not easy to access information.	Sum up of offered services/events dates/open calls
best practices	Good practices repository
Exchange of knowledge.	Good practices repository
Good practices repository	Good practices repository
Information about best practices in clusters.	Good practices repository
Organization of exchange the experiences among Clusters.	Good practices repository
To see more details about other cluster experience - practical on operations, development, challenges etc	Good practices repository
Coaching	Cluster management training sessions
Courses on European calls and strategy for clusters to increase their success rate.	Cluster management training sessions
International Cluster Management Courses (good practices, workshop) Accredited by ECCP	Cluster management training sessions
Opportunities about cluster management training, how / when / where can a we participate on it	Cluster management training sessions
Calendar of all events - topic, venue, sector	
An individual help to better target the tools available	Help to understand how to profit from the platform
I'm very happy with the platform and actually have the feeling that I'm not taking the maximum advantage of all the features	Help to understand how to profit from the platform
To help me to be much more involved and to train me how to use your Platform * thank you	Help to understand how to profit from the platform
Option to select sector-specific events / news	Events and news divided by sector
The information supplied is very wide and very elaborate. We are primarily financed by the industry. This means we have limited resources (time & budget) to spend on general information exchange with other clusters by reading	Events and news divided by sector

newsletters, visiting websites and events. A more thematic/focussed approach would be more useful in our case.	
More financial possibilities and calls	More financial aid and calls
News on the platform to be more user friendly to use and to have an option to import images, YouTube links and other links within the news and more share buttons to different networks.	More devices for news' platform (eg. Import videos, images)
Better matching between concrete needs of certain SMEs	More SMEs oriented projects
Looking at the previous question it would be possible to think some service more oriented towards members of cluster than cluster itself	More SMEs oriented projects
Better connection and integration with other social networks.	Better integration with social networks
Contacts with tourism clusters	Improve contact with tourism clusters
ECCP focusses in my view mainly on clusters. More content relevant to member companies would be welcome.	More content to non-clusters companies
Enabling web base e-conferences.	Online conferences
I would invite you to improve the existing ones - interface of the page and posting tool.	Improve interface and posting tool
In perfect world it would be list of potential partners from targeted markets with their needs	List of potential partners from targeted markets and their needs
more market and financial initiatives/call for SME's.	More financial aid and calls
Shared project management support to open Project opportunities.	Shared project management training sessions
The options that offer the profile for cluster organisations are often limited to drop downs menus with answers that do not always work for our cluster. It is hard to pick only two technology fields for example. Also, our cluster combines two regions but the profile only shows one - it would be better to design a more flexible profile template.	More flexible and large profile template
To be more user friendly	More user friendly
To create online possibilities to create and digitally sign MoU-s and contracts.	Online platform for MoU creation and signing
To find partners for international projects	Help finding international partners
to have related mobile application with notifications regarding partner search, calls, relevant news which are pinned as an important one.	Mobile app with all relevant information
Templates with MoU-s, and other relevant docs for cluster networking and starting a collaboration.	Useful documents Template (eg. MoU)

Table 7 Suggestions to improve ECCP Services