

# User Expectation Survey for the Collaboration Platform within the European Cluster Observatory and the European Club of Cluster Managers within the European Cluster Excellence Initiative

## 1 Introduction

The European Commission launched a number of cluster related projects and initiatives aiming at strengthening cluster policies within Europe and improving the efficiency of existing efforts in cluster management, as well as fostering international cluster cooperation. **The European Cluster Observatory** and **Cluster-Excellence.eu - the European Cluster Excellence Initiative** constitute two central pillars within this approach.

The European Cluster Observatory will offer an **online collaboration platform for cluster organisations and their members** enabling them to get easily in contact, to find a wide range of branch information, to find cooperation partners and to benchmark their performance within a virtual marketplace.

The Cluster-Excellence.eu project will develop a **European Club of Cluster Managers** that will have its contact point on the collaboration platform of the European Cluster Observatory.

The aim was to find out which functions/tools the Collaboration Platform should offer, which content/structure should the profile of the cluster organisation have and how the involvement of the cluster members (companies, research units, universities, etc.) should be made in the platform. It was particularly important for us to stress upon the fact that the Collaboration Platform is user-driven and striving to offer solutions to real needs of the cluster organizations and their members.

In the survey process there are 3 phases to be distinguished:

1. Development phase
2. Carrying out phase
3. Analysis phase

We had rather a short time available for the whole process – from the beginning of October till the end of December. The reason is that we needed the results of the survey in order to proceed to the next

step – the description of the technical requirements of the Collaboration Platform for the selection of the technical developer that should be of course based on the answers provided by the future users.

## 2 Respondents

**We would like to warmly thank all the participants at the survey for their time and information given!**

We were overwhelmed by the number and by the quality of the answers received, which exceeded our expectations. It is probably the largest European survey among cluster organizations completed in such a short time.

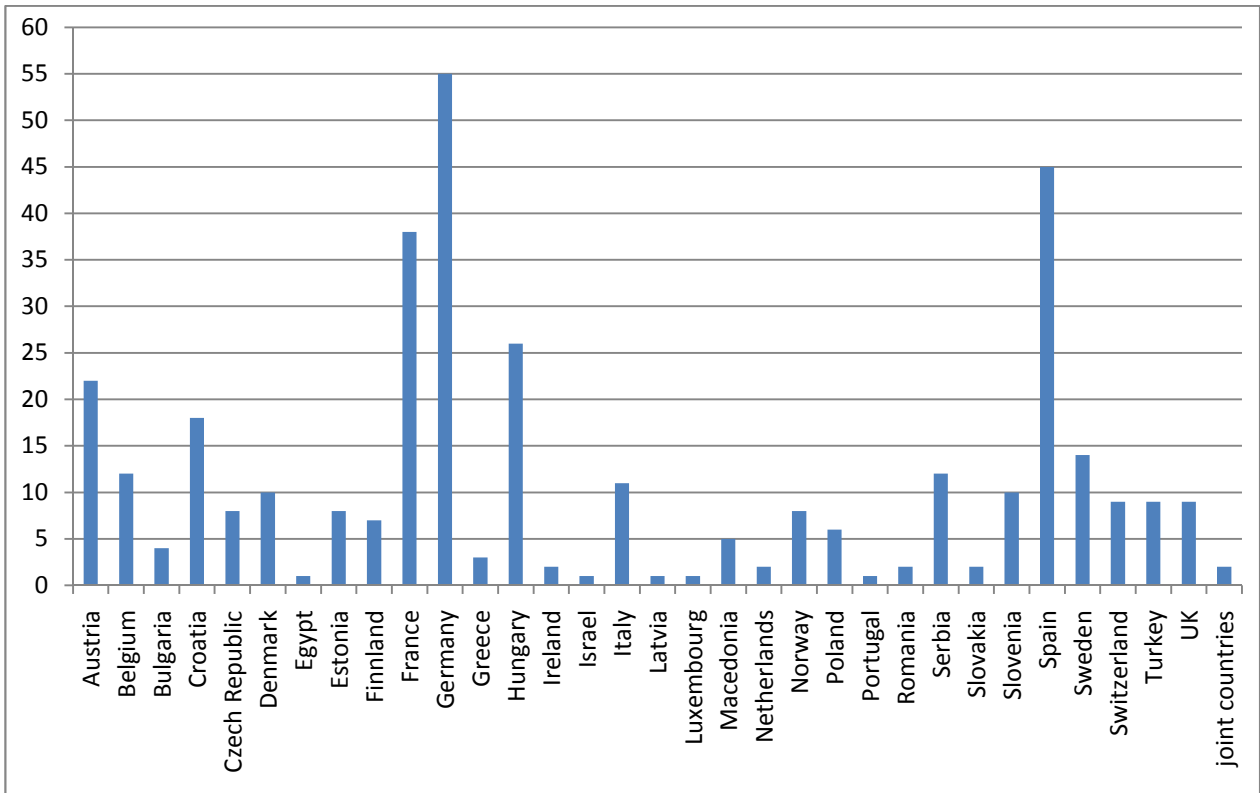
405 persons working in different cluster organisations as well as in the public sector were considered in the analysis below, while 15 additional answers were received after the survey was closed (we received answers up to February).

We were impressed not only by the numbers, but also by the quality of the answers (the large majority answered all questions). An important value of the answers lies also in the additional direct feedback we received by email– encouragements for this initiative, comments, etc. Many respondents clearly stated that they want to be part of the first users to test and work with the platform and actively get involved in its development through feed-back (user-driven concept).

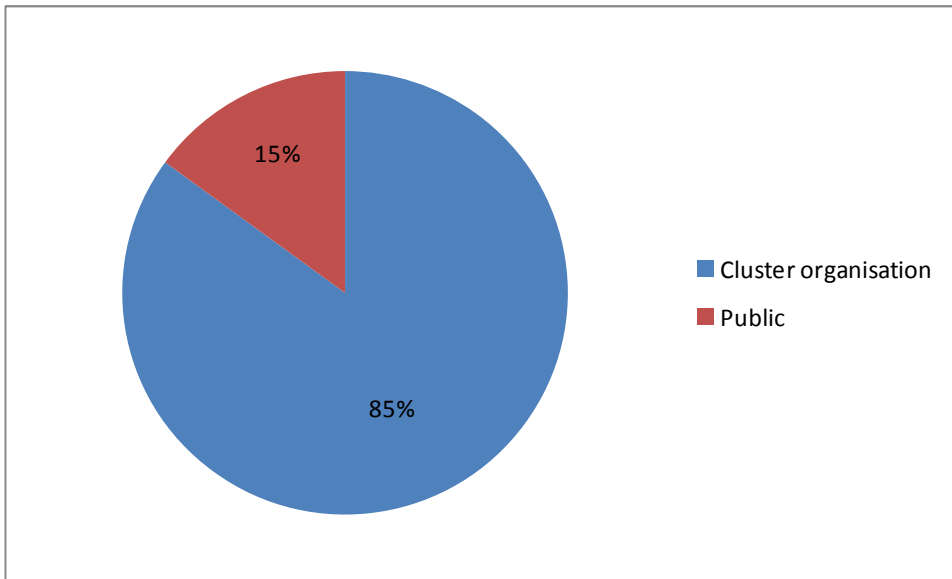
An important role in the mobilization of the cluster community played the various cluster networks, like TCI, Sophia Antipolis, Europa Intercluster who offered room for promotion during their international annual conferences, the EACP network (European Aerospace Cluster Partnership), France Clusters in France, Kompetenznetze Deutschland and MFG Baden-Württemberg in Germany, the Austrian National Cluster Platform, the Pole Program and MGYOSZ in Hungary, the National Center for Clusters in Croatia, the cluster networks around our “colleague-projects” within the Europe INNOVA initiative, the ABCEurope and ECOCluP, as well as the Europe Enterprise Network (EEN). Here we would like to thank all the responsible persons for their active promotion of the survey. In addition our particular thanks go to our Spanish colleagues from Generalitat de Catalunya and from Orkestra, as well as to the coordinator of the whole Cluster Observatory project, the Stockholm School of Economics, for a motivating support.

The classification of the countries of origin of the respondents can be seen in the table below. In particular, Germany, Spain and France contributed to the survey with a high rate of responses, followed by Hungary, Austria and Croatia. Some countries like Serbia were involved at the last minute and provided within few days a numerous input.

Despite the fact that the answers are numerous, we are aware that the reality of the existing cluster organizations is larger than we might expect. Based on the experiences we gained through the survey, in particular through the personal contacts we had in the identification of the “multipliers”, we learned that Germany and France have hundreds of cluster organizations, that Italy or the UK have for sure more cluster organizations than the number represented in the survey.

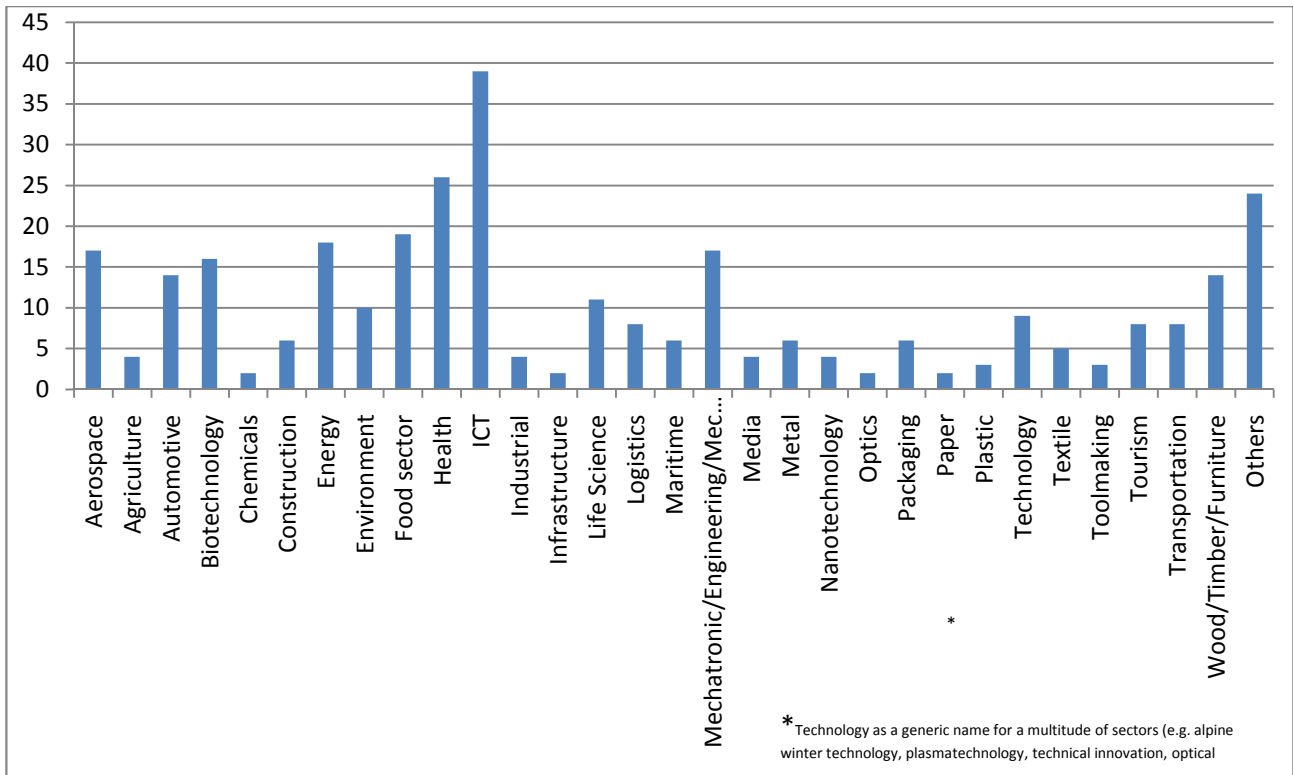


Talking about the structure of the respondents, the aim was to get the feedback exclusively from the cluster organizations. In case the questionnaire reached cluster policy makers or cluster stakeholders (administrators/coordinators of cluster organizations), these were asked to answer from the perspective of a cluster organization. It was also sometimes difficult to put the line between cluster organization – as a separate body - and a regional/national public authority under whose roof cluster organizations are acting. The table below shows the ratio between cluster organizations and public bodies.



The sector classification is a very challenging issue for the near future where the sector classification has to be offered by the platform in a close relation to the real industrial landscape. Depending on the existing sector definitions, a solution could be to offer larger categories and sub-categories and to offer as well the flexibility for the users to possibly choose several sectors to which their activities are related to. For example a cluster organization for wood-construction and furniture would belong to the construction and to the furniture sector.

The participating cluster organizations have been classified into different sectors as in the table below:



The sectors where most answers came from are the health sector and ICT, followed by the food sector, energy, aerospace and mechatronics/engineering/mechanical sectors.

### **3 Expected benefits**

The first part of the survey tried to get answers regarding the expectations from an on-line collaboration platform.

The top three expected benefits are:

- Easier/quicker ways of identifying cluster organisations in Europe with particular competences (92% very important or rather important)
- Improved information about (European) projects with access to a larger pool of potential partners (92% very important or rather important)
- increased visibility of the cluster organization internationally (91% very important or rather important)

Nevertheless, also the other benefits like access to specific sectoral information, easier ways of establishing contacts, exchange of experience and methods and channels to promote the interests of cluster members internationally have been ranked very high (between 90% and 85% very important or rather important)

Therefore, it is a definite must that all the expected benefits have to be covered by the on-line collaboration platform.

### **4 Functions/Tools**

In order to be able to provide the potential benefits requested in part 1, special questions were designed in part 2 to get answers related to the functions/tools regarded as meaningful to the participants of the survey.

The most significant tools according to the survey answers are:

- Advanced search functions for cluster organization (91% very important or rather important)
- (EU) project marketplace for finding information and partners for EU projects (85% very important or rather important)
- Library on sectoral studies/documents/information (79% very important or rather important)

In general, none of the listed functions/tools has received negative responses, but communication tools available on the platform were not really considered as an important topic, also project and document administration system as well as news sharing through blogs, newsroom, RSS feed, etc.

have a rather low response compared to the top three significant tools (all of them are slightly above 50%). However, the ranking is important but we have to keep in mind that news sharing, RSS feed, etc. contribute to providing some of the benefits requested.

## **5 Profile of the cluster organization**

In order to achieve a good of the performance of the platform and a high degree of satisfaction of the users, the received data has to have a high quality. Therefore, the third part of the survey covered the issue of which data the participants are ready to provide and which data are interesting to know about the others.

It is reassuring that the participants of the survey mention that they would provide all of the information mentioned in the survey (contact information, sector classification, industry keywords, competences of the cluster, main activity areas for the cluster organization, cluster organization factsheet, mission statement, interest areas of the cluster organization, list of services offered to the collaboration platform and list of services requested by the collaboration platform). The lowest response can be found on the data cluster organization factsheet, which still had a highly positive response of 87%.

The top three data which has been judged as very useful to know about others are:

- contact information for cluster organizations (97% very important or rather important)
- competences of the cluster (91% very important or rather important)
- Interest areas of the cluster organization as well as with the same percentage list of services/info offered to the collaboration platform (90% very important or rather important)

The lowest responses have received the data mission statement (65%) and cluster organization factsheet (78%). Therefore, those are on the lowest ranking considering important data for the participant of the survey to know about others – but again, 78% might be low in ranking but on an absolute basis a number that has to be taken into consideration.

## **6 Involvement of the cluster members**

We offered the possibility to choose between two different kind of models. Model A focuses on a platform for cluster organizations only but with a listing of members, while Model B focuses on a platform for cluster organizations plus a reserved area with special functions for cluster members, based on their special cluster member profiles.

It was interesting to see that 56% of the participants decided for Model B (56%) and a majority of the participants who voted for Model B think that the members themselves, as well as the cluster

organizations (as a service for their members) should supply the information for the member profiles (58%).

## 7 Cluster Managers Club

The aim of part 5 of the survey was to understand the networking needs for the design and services of the Cluster Managers Club.

The question if the participants of the survey would be interested in interacting directly with each other (between cluster managers) had a highly positive response. 90% would like to interact with other managers in their region, 93% would like to interact with other managers at a national level and 95% would like to interact at European level with other managers.

Talking about the top 3 objectives of a European cluster managers club, the following three have been ranked highest:

- Organization of working groups on topics of interest (89% very important or rather important)
- Facilitation of the access to services to their cluster members (89% very important or rather important)
- Representation of the interests of cluster managers in the EU, raise the recognition of cluster management as a profession (79% very important or rather important)

Nevertheless, also the other objectives promote qualification and trainings for cluster management (76%) and provide services for social networking (73%) achieved a quite similar percentage than the top 3 ranked objectives.

## CONCLUSION

A brief conclusion based only on the number/quality/speed of answers to the survey leads to the fact that the Collaboration Platform and the Cluster Managers Club raise issues on real needs that cluster organizations want to have covered (rather quickly). The survey did not create the need – the survey unleashed the awareness of this need and the potential benefits cluster organizations may take out of the platform. Cluster organizations did show through the survey that they are interested in and committed to this development **as users**. We will do our best to meet these expectations by technically developing an on-line tool in a process where the user-involvement remains the driving force.

Below you will find the summary of all answers to each question of the survey.

In the spirit of user-driven development, **we would like to know your expectations from an on-line collaboration platform** for cluster organisations, in order to design the technical development around them.

# 2

## Expected benefits

How important is this benefit for you?

|  |   |
|--|---|
| 2.1. Increased <b>visibility</b> of your cluster organisation internationally  | <input type="checkbox"/> very important 62%<br><input type="checkbox"/> rather important 29%<br><input type="checkbox"/> less important 8%<br><input type="checkbox"/> not important at all 1%  |
| 2.2. Access to specific <b>sectoral information</b> (developments and trends) through news, thematic discussion groups, library, blogs, etc. | <input type="checkbox"/> very important 55%<br><input type="checkbox"/> rather important 35%<br><input type="checkbox"/> less important 9%<br><input type="checkbox"/> not important at all 1%  |
| 2.3. Easier/quicker ways of <b>identifying cluster organisations</b> in Europe with particular competences you are interested in             | <input type="checkbox"/> very important 51%<br><input type="checkbox"/> rather important 41%<br><input type="checkbox"/> less important 7%<br><input type="checkbox"/> not important at all 1%  |
| 2.4. Easier/quicker ways of establishing and <b>maintaining contacts</b> with cluster managers internationally                               | <input type="checkbox"/> very important 42%<br><input type="checkbox"/> rather important 44%<br><input type="checkbox"/> less important 14%<br><input type="checkbox"/> not important at all 0% |
| 2.5. Enhanced exchange of <b>experiences and methods</b> with experts on issues like cluster management, SME support, etc.                   | <input type="checkbox"/> very important 46%<br><input type="checkbox"/> rather important 40%<br><input type="checkbox"/> less important 13%<br><input type="checkbox"/> not important at all 1% |
| 2.6. New channels to promote the interests of <b>cluster members</b> internationally   | <input type="checkbox"/> very important 47%<br><input type="checkbox"/> rather important 38%<br><input type="checkbox"/> less important 14%<br><input type="checkbox"/> not important at all 1% |
| 2.7. Improved information about <b>(European) projects</b> with access to a larger pool of potential <b>partners</b>                         | <input type="checkbox"/> very important 54%<br><input type="checkbox"/> rather important 38%<br><input type="checkbox"/> less important 7%<br><input type="checkbox"/> not important at all 1%  |
| 2.8. Enhanced competence of the cluster management through information and knowledge-sharing   | <input type="checkbox"/> very important 36%<br><input type="checkbox"/> rather important 47%<br><input type="checkbox"/> less important 16%<br><input type="checkbox"/> not important at all 1% |
| 2.9. <i>Other (please describe):</i>   | <input type="checkbox"/> very important<br><input type="checkbox"/> rather important<br><input type="checkbox"/> less important<br><input type="checkbox"/> not important at all                |



In order to provide you the potential benefits above, **which functions/tools would you regard as meaningful?** What is your opinion?

# 3

## Functions/Tools

How important is this function/tool for you?

|   |  |
|---|--|
| <b>3.1. Advanced search</b> function for cluster organisations (“who can do what”, competences, regions, industry keywords, etc.)                     | <input type="checkbox"/> very important 60%<br><input type="checkbox"/> rather important 31%<br><input type="checkbox"/> less important 8%<br><input type="checkbox"/> not important at all 1%   |
| <b>3.2. Event</b> calendar, where you can post your own events and presentations and see what others are doing  | <input type="checkbox"/> very important 30 %<br><input type="checkbox"/> rather important 47%<br><input type="checkbox"/> less important 21%<br><input type="checkbox"/> not important at all 2% |
| <b>3.3. Discussion</b> fora and thematic discussions/community building for industry issues, best practices, etc.                                     | <input type="checkbox"/> very important 25%<br><input type="checkbox"/> rather important 46%<br><input type="checkbox"/> less important 27%<br><input type="checkbox"/> not important at all 2%  |
| <b>3.4. (EU) project marketplace</b> for finding information and partners for (EU) projects   | <input type="checkbox"/> very important 52%<br><input type="checkbox"/> rather important 33%<br><input type="checkbox"/> less important 13%<br><input type="checkbox"/> not important at all 2%  |
| <b>3.5.</b> Cluster organisation <b>benchmarking</b> , to compare your organisation to others   | <input type="checkbox"/> very important 33%<br><input type="checkbox"/> rather important 41%<br><input type="checkbox"/> less important 23%<br><input type="checkbox"/> not important at all 3%  |
| <b>3.6. Communication</b> tools directly available on the platform (internal email services, Skype, video conference, etc.)                           | <input type="checkbox"/> very important 20%<br><input type="checkbox"/> rather important 32%<br><input type="checkbox"/> less important 40%<br><input type="checkbox"/> not important at all 8%  |
| <b>3.7. News sharing</b> through blogs, newsroom, RSS feed, etc   | <input type="checkbox"/> very important 16%<br><input type="checkbox"/> rather important 42%<br><input type="checkbox"/> less important 38%<br><input type="checkbox"/> not important at all 4%  |
| <b>3.8. Project</b> and document administration system; presentation sharing, video clips   | <input type="checkbox"/> very important 16%<br><input type="checkbox"/> rather important 39%<br><input type="checkbox"/> less important 38%<br><input type="checkbox"/> not important at all 7%  |
| <b>3.9. Cluster WIKI</b> , where you can find and provide knowledge on cluster management and other cluster issues (similar to the Wikipedia website) | <input type="checkbox"/> very important 23%<br><input type="checkbox"/> rather important 43%<br><input type="checkbox"/> less important 29%<br><input type="checkbox"/> not important at all 5%  |
| <b>3.10. Library</b> on sectoral studies/documents/information  | <input type="checkbox"/> very important 40%<br><input type="checkbox"/> rather important 39%<br><input type="checkbox"/> less important 19%<br><input type="checkbox"/> not important at all 2%  |

Many of the functions/tools above are based on the data received from the cluster organisations in form of a **profile in English. The better quality the data has, the better the performance of the platform and the higher the satisfaction of the users (you).** It is of particular importance for us to know which data you would be ready to provide and you would be interested to know about others:

# 4

## Profile of the cluster organisation

### 4.1. Contact information for cluster organisations

*e.g. address, website, logo, cluster management team, telephone, photo, etc.*

Would you provide it?  
 yes 99%  
 no 1%

Would it be useful for you?  
 very useful 60%  
 rather useful 37%  
 less useful 3%  
 not useful

### 4.2. Sector classification

*Identification from a choice of approx. 40-50 pre-defined sectors (including new emerging industries), multiple choice is possible.*

Would you provide it?  
 yes 94%  
 no 6%

Would it be useful for you?  
 very useful 53%  
 rather useful 41%  
 less useful 5%  
 not useful 1%

### 4.3. Industry keywords

*Possibility to fill in several descriptive industry keywords (sub-categories of specialisation). E.g. for wood cluster: wood construction, furniture, architecture, etc.*

Would you provide it?  
 yes 93%  
 no 7%

Would it be useful for you?  
 very useful 50%  
 rather useful 39%  
 less useful 9%  
 not useful 2%

### 4.4. Competences of the cluster

*Descriptive elements for the top 10 competences of the cluster (members) in certain technologies, product and process competences, etc.*

Would you provide it?  
 yes 91%  
 no 9%

Would it be useful for you?  
 very useful 55%  
 rather useful 36%  
 less useful 7%  
 not useful 2%

### 4.5. Main activity areas for the cluster organisation

*Aims to show the activity focus of the cluster organisation, e.g. information & communication; training and HR attraction; cooperation; firm formation; marketing/PR; internationalisation; location marketing/attraction of foreign investment; start-up support; others...*

Would you provide it?  
 yes 95%  
 no 5%

Would it be useful for you?  
 very useful 46%  
 rather useful 42%  
 less useful 11%  
 not useful 1%

### 4.6. Cluster organisation factsheet

*No. of members, type of organisation (public, private, PPP), no. of employees, financing, success stories, no. and details of (international) cluster projects, etc.*

Would you provide it?  
 yes 87%  
 no 13%

Would it be useful for you?  
 very useful 37%  
 rather useful 41%  
 less useful 19%  
 not useful 3%

|   |   |   |
|---|---|---|
| <b>4.7. Mission statement</b>   | Would you provide it?<br><input type="checkbox"/> yes 94%<br><input type="checkbox"/> no 6% | Would it be useful for you?<br><input type="checkbox"/> very useful 25%<br><input type="checkbox"/> rather useful 40%<br><input type="checkbox"/> less useful 30%<br><input type="checkbox"/> not useful 5% |
| <i>(reason for the foundation of the cluster organisation, history of the organisation)</i>   |   |   |
| <b>4.8. Interest areas of the cluster organisation:</b>   | Would you provide it?<br><input type="checkbox"/> yes 91%<br><input type="checkbox"/> no 9% | Would it be useful for you?<br><input type="checkbox"/> very useful 48%<br><input type="checkbox"/> rather useful 42%<br><input type="checkbox"/> less useful 9%<br><input type="checkbox"/> not useful 1%  |
| <i>Technology/sectoral information, markets, R&amp;D projects, IPR issues, cl. management methodologies, financing, trends, marketing, events, etc.</i> |   |   |
| <b>4.9. List of services/info offered to the collaboration platform by you</b>  | Would you provide it?<br><input type="checkbox"/> yes 93%<br><input type="checkbox"/> no 7% | Would it be useful for you?<br><input type="checkbox"/> very useful 47%<br><input type="checkbox"/> rather useful 43%<br><input type="checkbox"/> less useful 9%<br><input type="checkbox"/> not useful 1%  |
| <i>Partnership for (EU) projects, events, trainings, news, best practices, studies, etc.</i>  |   |   |
| <b>4.10. List of services requested by you from the collaboration platform</b>  | Would you provide it?<br><input type="checkbox"/> yes 92%<br><input type="checkbox"/> no 8% | Would it be useful for you?<br><input type="checkbox"/> very useful 48%<br><input type="checkbox"/> rather useful 40%<br><input type="checkbox"/> less useful 10%<br><input type="checkbox"/> not useful 2% |
| <i>Partnership for (EU) projects, best practices, benchmarking, studies, club services, etc.</i>  |   |   |
| <i>Others: please mention.....</i>  |   |   |

Do you estimate that there is a **need to involve the cluster members (companies, research units, universities) in the on-line collaboration platform for the cluster organisations?** Which of the following models would be appropriate for this?

## 5 Involvement of the cluster members

**Model A 44%**

*A platform for cluster organisations only but with a listing of members*

- direct link to the listing on the cluster website or 84%
- another listing form (e.g. excel file) 8%

8% ohne Angabe

**Model B 56%**

*A platform for cluster organisations plus a reserved area with special functions for cluster members, based on their special cluster member profiles.*

Who would supply the information for the member profiles?

- The members themselves 12%
- The cluster organisations – as a service for their members 28%
- Both 58%

2% ohne Angabe

The collaboration platform will also **support the services offered by the future European Club of Cluster Managers**.

Your answers to the questions below are helpful to understand your networking needs for the club design:

# 6 Cluster Managers Club

## 6.1. Are you interested in interacting directly with other cluster managers?

Why?

|                   |  |                |
|-------------------|--|----------------|
| In your region    | <input type="checkbox"/> yes <input type="checkbox"/> no | 90% / 10%..... |
| At national level | <input type="checkbox"/> yes <input type="checkbox"/> no | 93% / 7%.....  |
| At European level | <input type="checkbox"/> yes <input type="checkbox"/> no | 95% / 5%.....  |

## 6.2. Can you name any organisation (club, network) of cluster managers you know?

.....

If you are a member, how do you benefit from it?

.....

**36% ohne Angabe**

### At level

- European 24%
- national 22%
- regional 18%

### Expected benefits

.....  
 .....  
 .....

## 6.3. Please rate the significance of following objectives of a European cluster managers club:

- Provide services for social networking
  
- Organise working groups on topics of interest
  
- Facilitate the access to services to their cluster members (business/tech. matchmaking, etc.)
  
- Promote qualification and trainings for cluster management
  
- Representing the interest of cluster managers in the EU, raise the recognition of cluster management as a profession

### How important?

- very important 37%
- rather important 36%
- less important 24%
- not important 3%
  
- very important 45%
- rather important 44%
- less important 10%
- not important 1%
  
- very important 52%
- rather important 37%
- less important 10%
- not important 1%
  
- very important 36%
- rather important 40%
- less important 21%
- not important 3%
  
- very important 48%
- rather important 31%
- less important 17%
- not important 4%