

# ***CLUSTER POLICY IN CATALONIA***

## ***WHY WE STARTED AND WHERE WE ARE.***

**Dr. Marc Sansó**

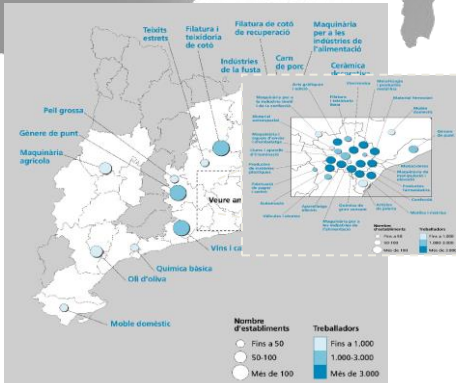
*Digital & Tech Cluster Responsible  
ACCIÓ / Directorate General for Industry  
Government of Catalonia*

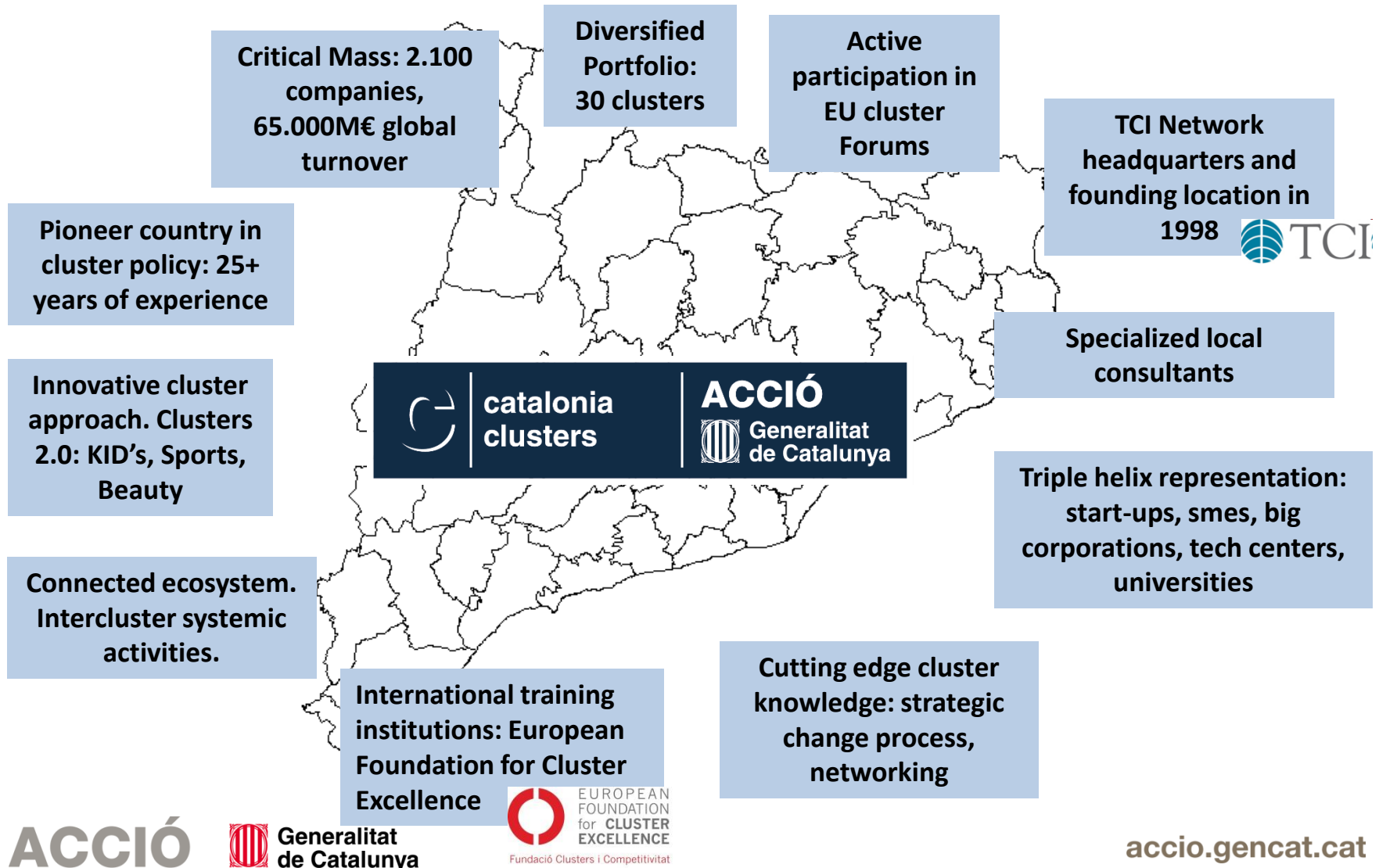
# A BIT OF CONTEXT

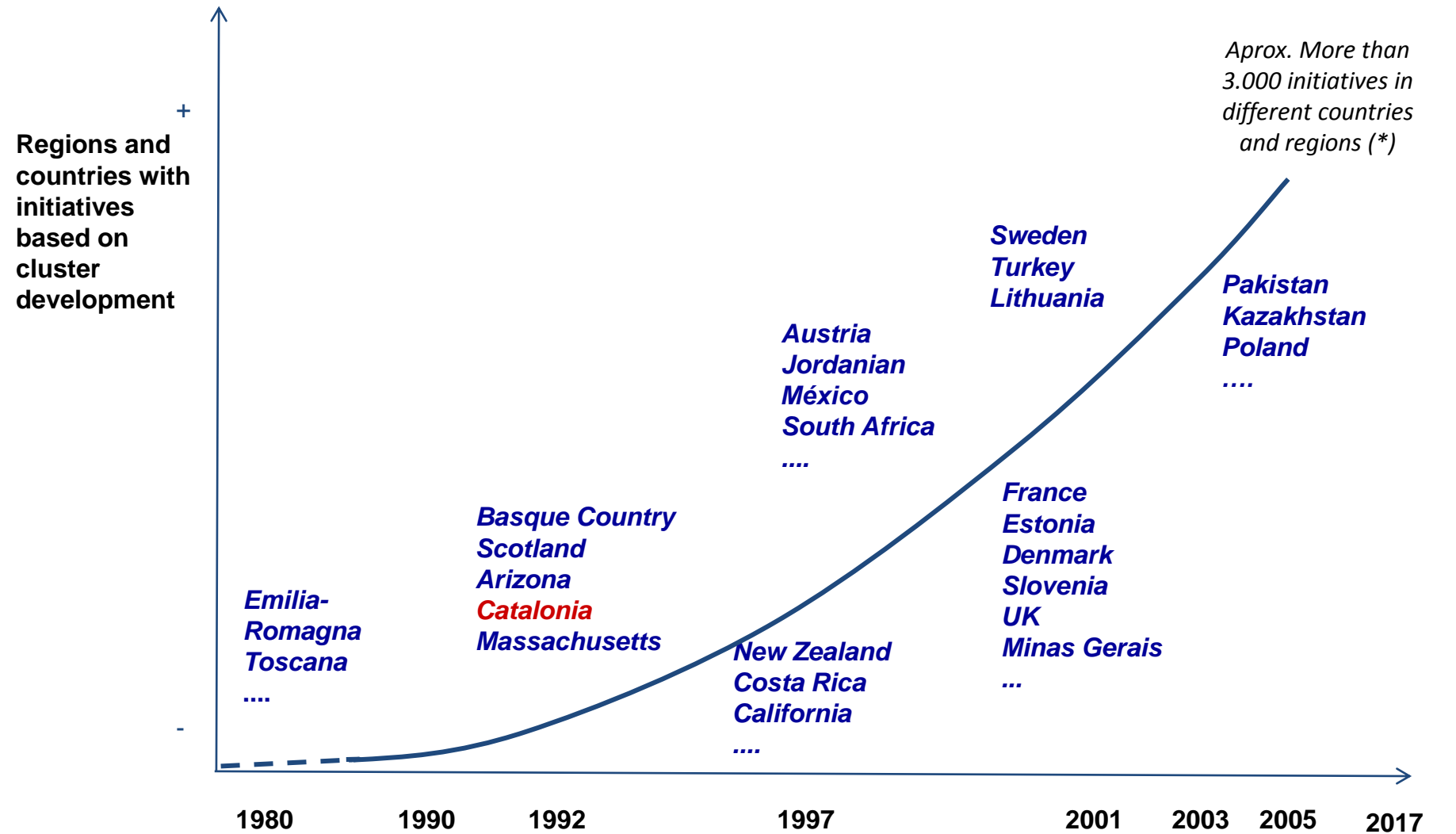
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- Catalonia's GDP is comparable to Israel's and Denmark (225b€ 2016), 3,1% inter-annual growth.
- Catalonia's GDP PPP: 114 (Spain= 92, EU-28=100)
- Population: 7,5 million (similar to Switzerland)
- Catalan productive fabric is very concentrated in clusters (40% of total industrial turnover).
- Diversified economy, with a strong traditional industrial focus. Rising european tech hub
- Economy mainly composed by SMEs (99% of total firms).









## Michael E. Porter, *On Competition*, (Boston, 1998)

ization of concepts, relationships, and linkages among constituencies. In the private sector, new or revitalized trade associations often take leading roles in the continuing upgrading of clusters. In government, cluster upgrading can be institutionalized by appropriately organizing government agencies, organization through the gathering and dissemination of economic statistics, and by controlling the structure and membership of business advisory groups.

### Summary

A cluster is a system of interconnected firms and institutions the whole of which is greater than the sum of the parts. Clusters play an important role in competition, and these raise important implications for companies, governments, universities, and other institutions in an economy.

Clusters represent a new and complementary way of understanding an economy, organizing economic development, and setting public policy. Understanding the state of clusters in a location provides important insights into the productive potential of its economy and the constraints on its future development. Paradoxically, then, the most enduring competitive advantages in a global economy will often be local.

### Microclusters in Catalonia

#### History

Catalonia, one of Spain's seventeen autonomous regions, accounts for 13 percent of the national population but almost 20 percent of its GDP and about 40 percent of its industrial exports. In December 1989, Antoni Subirà was appointed Catalonia's Minister of Industry, Trade and Commerce. Soon after, he obtained a manuscript copy of *The Competitive Advantage of Nations* and circu-

lated several chapters within the ministry. With Spain facing entry into the European Common Market in 1992, Subirà sought to develop a new approach to industrial policy in Catalonia. He chose clusters as a central element.

Since then, approximately twenty Catalan clusters have been studied in detail. As of 1997, clusters continued to be used in Catalonia as the main methodology for assessing the

region's industrial competitiveness and for identifying areas in which the government could improve the environment for companies.

#### Actors

Initially, Subirà asked Professors Eduard Ballarín and Josep Faus from IESE, a top business school based in Barcelona, to apply the cluster methodology to the study of Catalonia's industry. Their preliminary work set the stage for a larger report, prepared together with Monitor Company, a consulting firm.\* The report offered an overall diagnosis of Catalonia's strengths and weaknesses and was well received. It defined groups of clusters (for example, mass-market consumption goods) and provided some general guidelines about what was needed to enhance their competitive advantage.

Subirà decided to take this work one step further and to study discrete clusters in more detail. Already-existing capabilities within the Ministry of Industry, Trade and Commerce were reorganized, and a local consulting firm—CLUSTER Competitiveness—was asked to lead a series of cluster initiatives. Each study involved companies, suppliers, trade associations, business schools, universities, and many government departments.

#### Cluster Definition

Catalan clusters included wooden toys, agricultural machinery, jewelry, leather, knitting, processed

meats, publishing, consumer electronics, and furniture.<sup>2</sup> Specific clusters were defined relatively narrowly. In furniture, for example, three separate clusters were isolated in different parts of Catalonia, each competing in different segments and facing different challenges. Estimates indicate that Catalonia has more than one hundred such narrowly defined clusters, or microclusters.

Each microcluster study included firms, suppliers, universities, and a wide range of other interested participants. Cluster boundaries and participation emerged as a result of the study process. Self-selection was the rule: All firms interested in participating were considered part of the cluster.

All clusters were viewed as equally desirable. For practical reasons, however, cluster studies were sequenced. Some clusters were initially much better organized than others. One goal of the process was to establish effective trade organizations to serve each cluster.

#### Process of Change

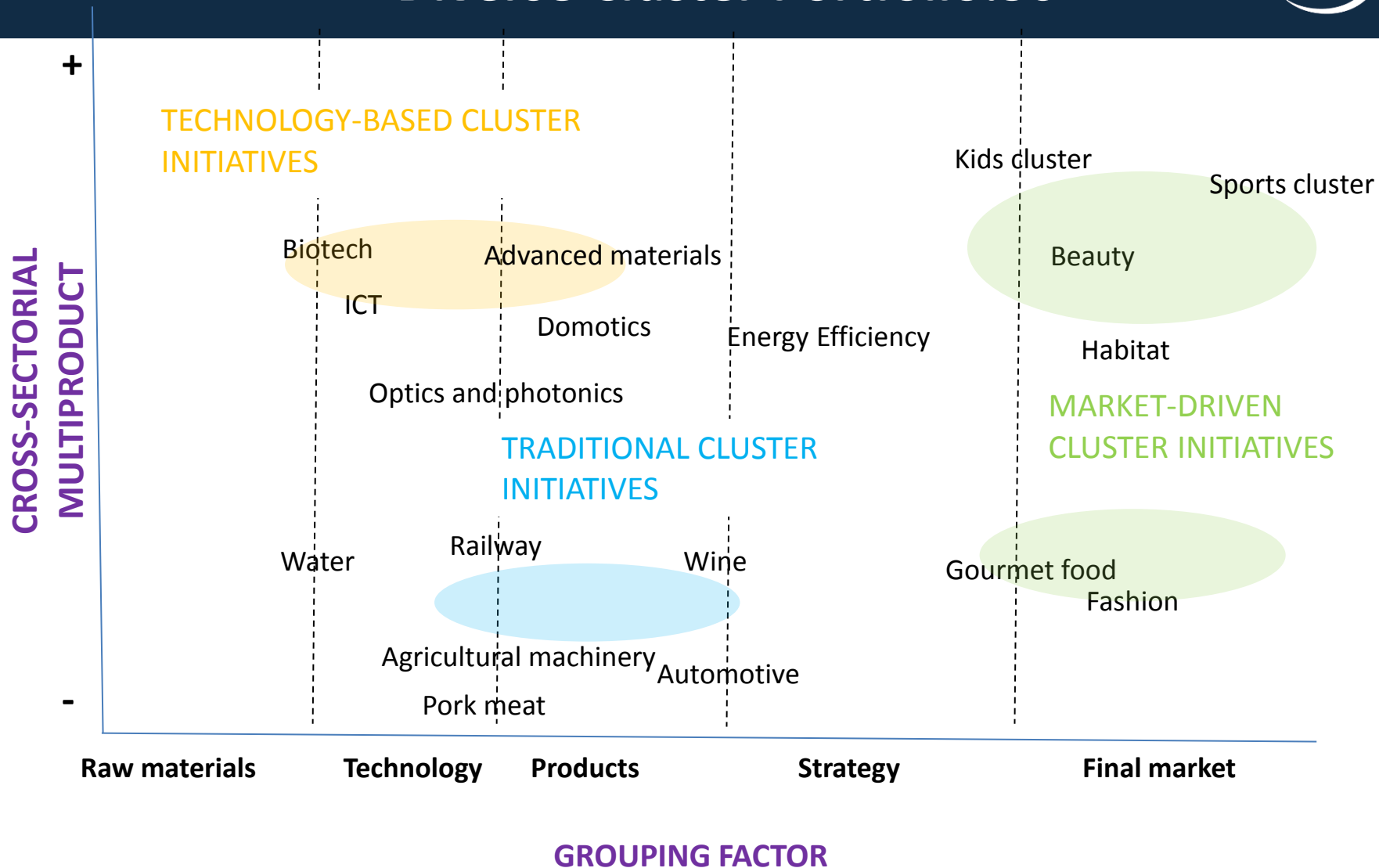
The cluster studies in Catalonia took place in three stages. In the first, the cluster's problems and opportunities were identified and the basic concepts of cluster upgrading, such as the goal of enhancing rather than suppressing competition, were laid out. At times, the study revealed a view of the cluster's problems that differed from that presented by con-

# THE CLUSTER ECOSYSTEM

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# Diverse Cluster Portfolio:30

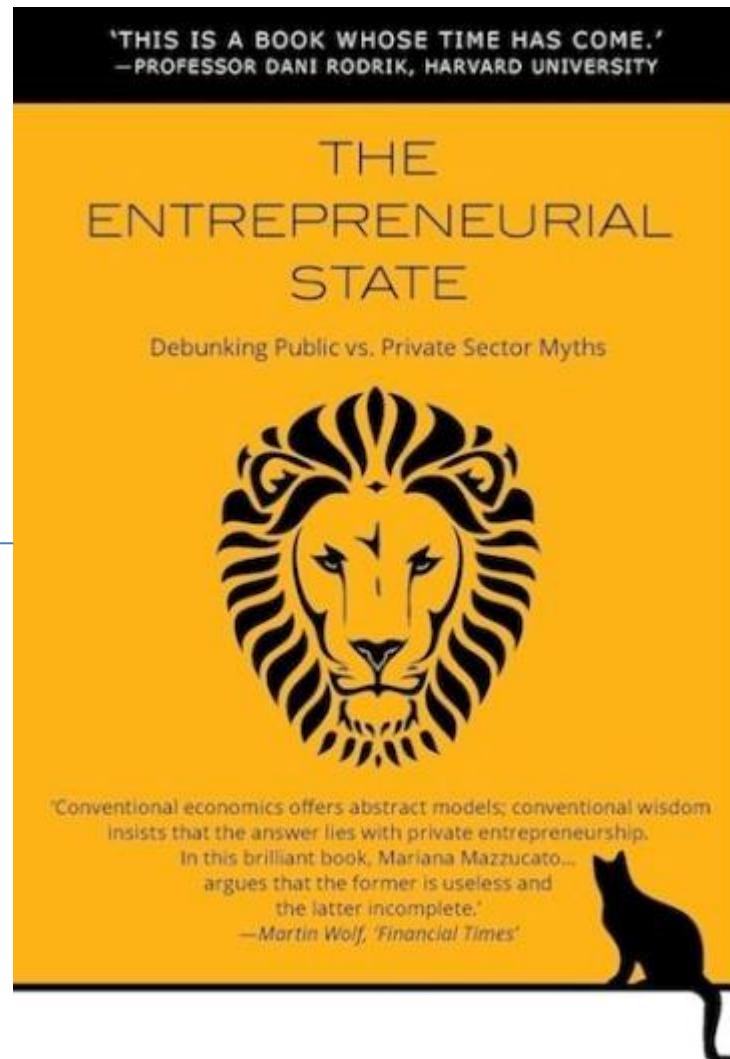






HARVESTING

EXPLORING



# OUR OLD SCHOOL PROCEDURES

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1. International Cluster Alliances at global level.
2. Benchmarking study trips to Advanced ecosystems.
3. International positioning.

Boston 2012



Israel 2013



Korea 2016



Québec 2015



Silicon Valley 2014













**Clústers a Catalunya:**  
Casos empresarials de  
canvi estratègic

*Salgot*



**Clústers a Catalunya:**  
Casos empresarials de  
canvi estratègic

*AVINENT*  
Implant System



**IESE**  
Business School  
University of Navarra



# RECENT IMPROVEMENTS...

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 <b>CWP</b> <small>CATALAN WATER PARTNERSHIP</small> <b>WATER</b>	 <b>Clúster Digital</b> <b>DIGITAL</b>	 <b>Foodservice CLUSTER</b> <b>FOODSERVICE</b>	 <b>FEMAC</b> <small>AGRICULTURAL PRODUCTION MEANS</small> <b>AGRICULTURAL PRODUCTION MEANS</b>	 <b>cataloniagourmet</b> <b>GOURMET FOOD</b>
 <b>ciac</b> <small>Clúster de la Indústria d'Automoció de Catalunya</small> <b>AUTOMOTIVE</b>	 <b>BCD</b> <small>Barcelona Centre de Disseny</small> <b>DESIGN</b>	 <b>Cicat</b> <b>LIGHTING</b>	 <b>cenfim</b> <small>Innovació en habitat</small> <b>FURNITURE</b>	 <b>KID'S CLUSTER</b> <b>KIDS RELATED PRODUCTS</b>
 <b>Beauty Cluster BARCELONA</b> <b>BEAUTY</b>	 <b>domotys</b> <b>SMART HOUSING</b>	 <small>CATALAN SPORTS CLUSTER</small> <b>INDESCAT</b> <b>SPORTS INDUSTRY</b>	 <b>modacc</b> <small>Cluster català de la moda i el text</small> <b>FASHION</b>	 <b>Clúster de Salut Mental de Catalunya</b> <b>MENTAL HEALTH</b>
 <b>CataloniaBio</b> <small>Connecting biocompanies</small> <b>BIOTECHNOLOGY</b>	 <b>CEEC</b> <small>Clúster d'Eficiència Energètica de Catalunya</small> <b>ENERGY EFFICIENCY</b>	 <b>HABITAT</b> <small>CLUSTER BARCELONA</small> <b>HOME PRODUCTS</b>	 <b>AINS</b> <small>Associació Empresarial Innovadora Nutrició i Salut</small> <b>NUTRITION AND HEALTH</b>	 <b>HealthTech Cluster</b> <b>HEALTH TECHNOLOGY</b>
 <b>INNOVACC</b> <small>ASSOCIACIÓ CATALANA D'INNOVACIÓ DEL SECTOR CARNI PORCÍ</small> <b>PORK MEAT</b>	 <b>solarlys</b> <b>SOLAR POWER</b>	 <b>cequip</b> <b>MACHINE TOOLS</b>	 <b>SECPho</b> <small>Light Technologies Cluster</small> <b>OPTICS AND PHOTONICS</b>	 <b>edutechcluster</b> <b>EDUCATION ICT</b>
 <b>IGUALADA LEATHER CLUSTER</b> <b>LEATHER TANNING</b>	 <b>railgroup</b> <b>RAILWAY</b>	 <b>Cluster MAV</b> <small>Clúster de Materials Avançats de Catalunya</small> <b>ADVANCED MATERIALS</b>	 <b>PACKAGING CLUSTER</b> <b>PACKAGING</b>	 <b>INNOVI</b> <small>Clúster Vinícola Català</small> <b>WINE</b>

30 clusters
 More than 2.100 companies
 Agregated turnover 65.000 M€
 25% Catalan GDP
 More than 290.000 workers



- Coworking space to foster networking among cluster teams
- Increase cluster visibility
- Knowledge hub for cluster activities
- Landing space for cluster Organization located outside Barcelona
- Showroom for products
- Saving on common services



From microclusters



Locally concentrated  
Defined by product

Clusters 2.0

Home products



Territorial scope is  
Catalonia  
Cross-sectorial



## INDUSTRY – OWN PRODUCT COMPANIES

**FOOD**  
(food, children specific products-breakfast, snack...- confectionery, sweets...)

**HYGIENE, COSMETICS, HEALTH**  
(Cologne, soap, nappies, creams, medicines...)

**FASHION AND ACCESSORIES**  
(Clother, shoes, accessories for children...)

**HABITAT**  
(decor, children's furniture, home textile...)

**CHILDCARE ITEMS**  
(prams, child car seats...)

**LEISURE AND ENTRETEINMENT** (toys, audiovisual products, books...)

**SCHOOL EQUIPMENT**  
(stationery, textbooks...)

**aprox. 300 companies**  
**over 3 bn € aggregated**  
**total sales**

IMAGE OWNERS-LICENSES

LICENSES STAKEHOLDERS

DISTRIBUTION

SALES BIG DISTRIBUTION  
CHANNEL

Pharmacy

Independent Retailers

Retailers

Independent  
Retailers

Child  
specialist

Child  
specialist

School Distribution

ORGANISED EDUCATION SERVICES

ORGANISED LEISURE SERVICES

MARKET

CHILD

PARENTS

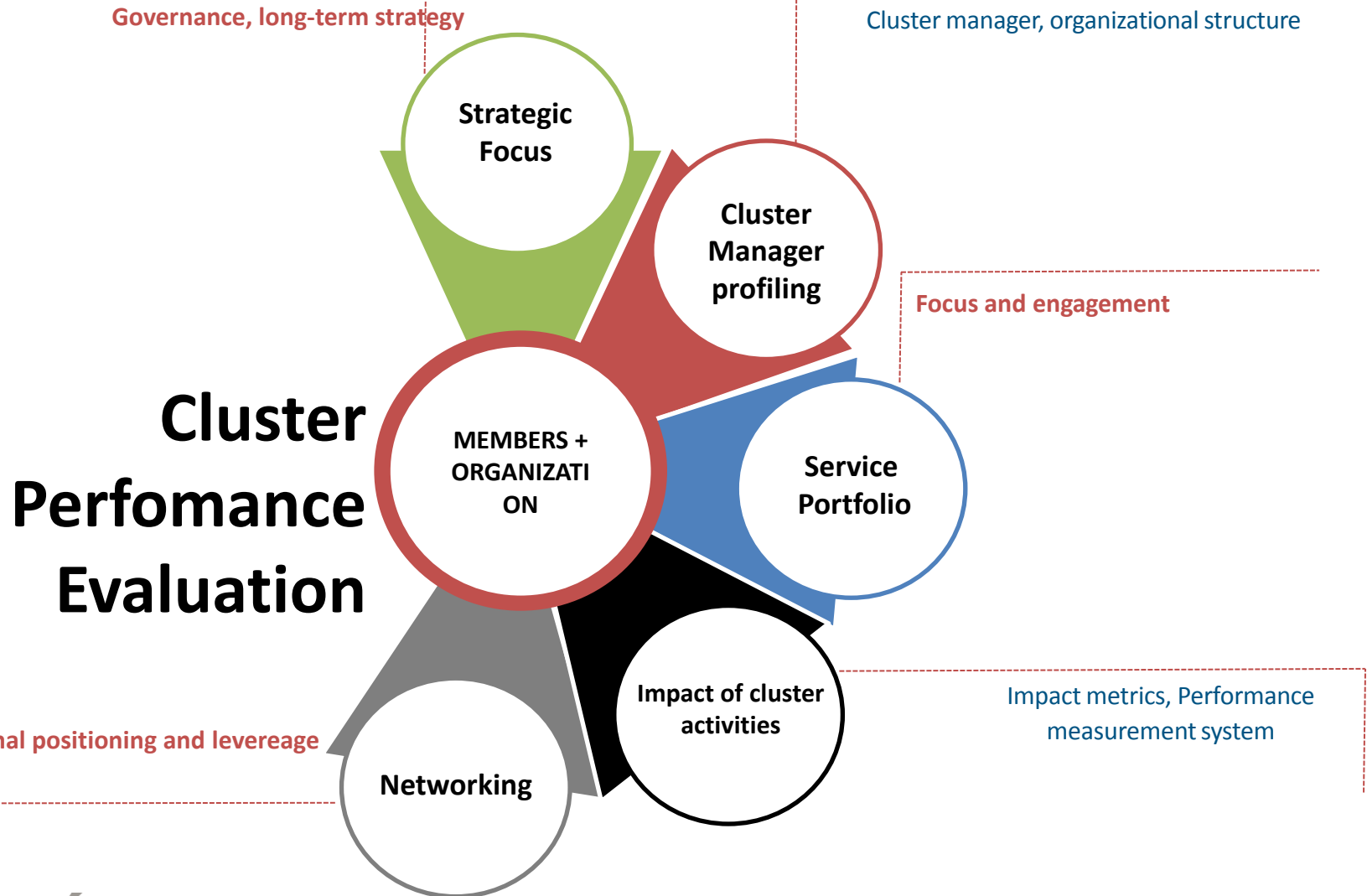
SCHOOLS

MASS  
MEDIA

OTHERS

# ...AND YET EVEN MORE RECENT

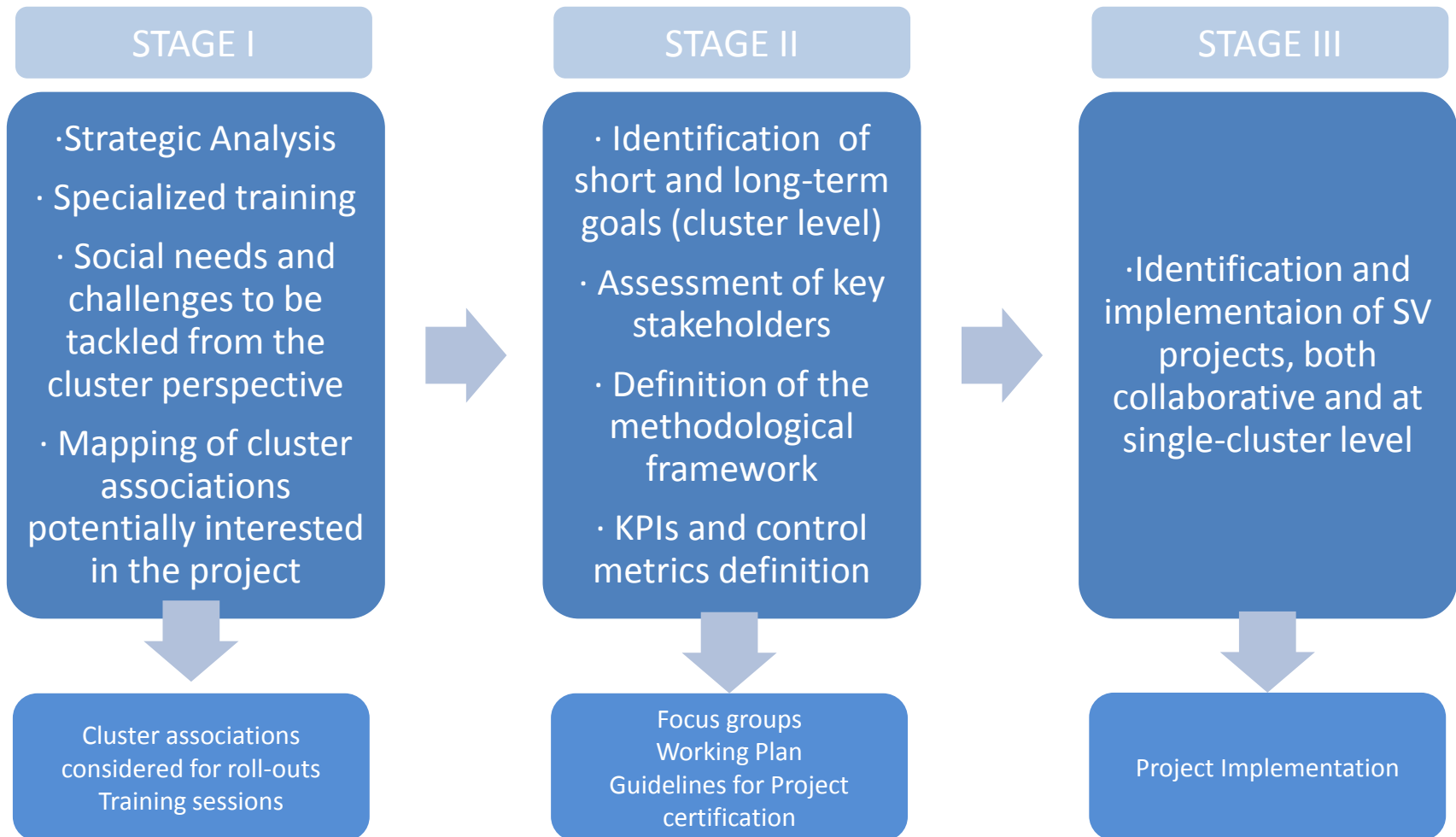
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“ *Shared value holds the key to unlocking the next wave of business innovation and growth...*

*An ongoing exploration of social needs will lead companies to discover new opportunities ... they previously overlooked.* ”





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