



Strategic value chain development through cluster organisations

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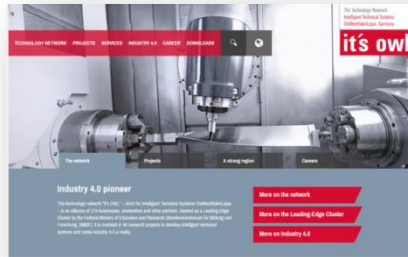
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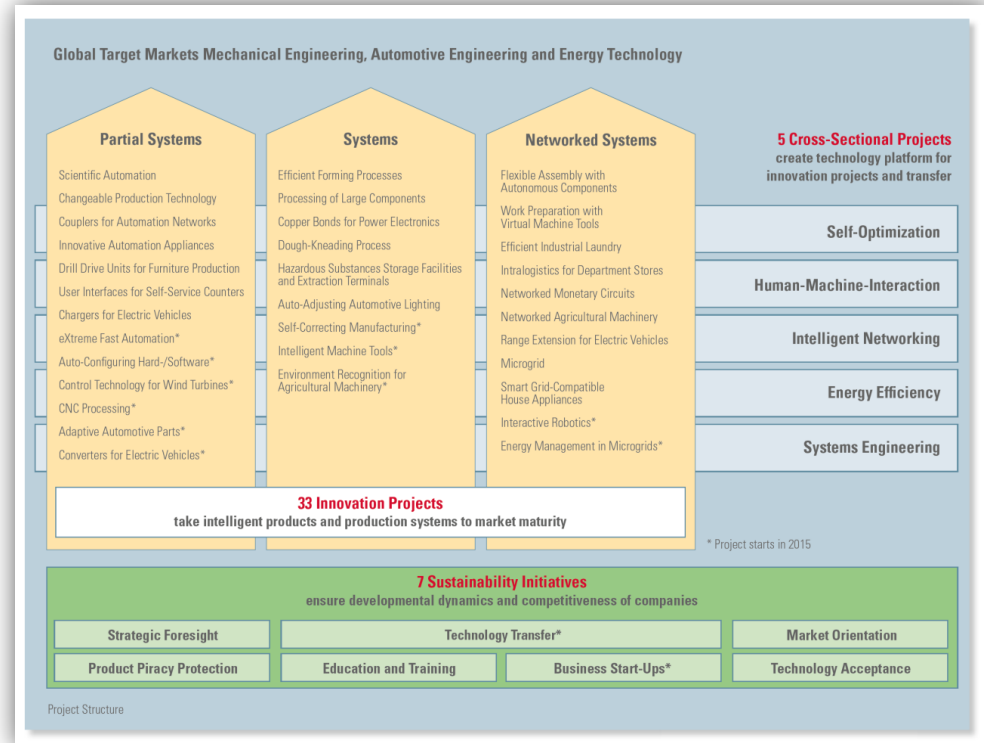
Clusters in Europe IV Conference 2017 – How can we draw from the lessons of the past to secure future success?

Budapest, November 30th, 2017

Cluster organisation acts as a catalyst within the cluster: strategy decides about success!



- Strategy contributes to efficient and effective R&D project development and commercialisation of R&D results.
- Clear and challenging time frame and performance targets.
- Driven and financially supported by larger companies in collaboration with smaller ones and scientific institutions. **Business say want they want!**
- **“Seed-funding” from government, but substantial co-investment from industry!**



Source: Technology Network Ostwestfalen Lippe – it's owl, www.its-owl.de/en/home

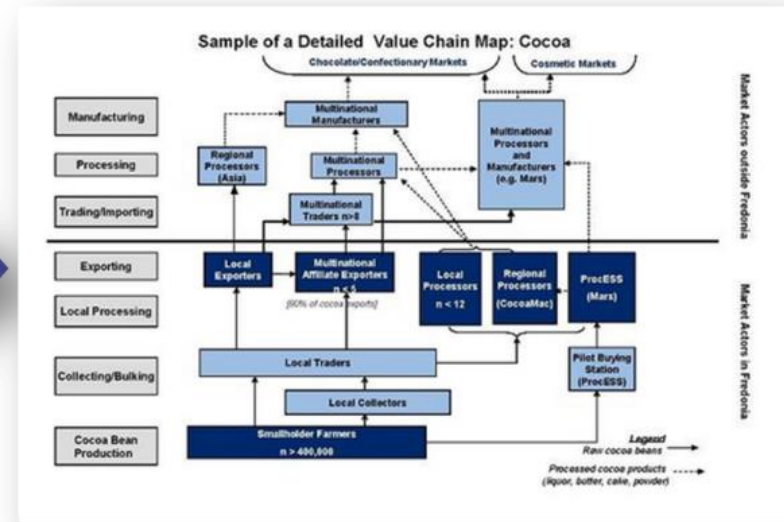
Important: A cluster/cluster organisation is not a technology or industry park whose purpose is to create infrastructure including site development (e. g. real estate) and to provide general R&D/business development support.

Success of a cluster = strategic development of a value chain through services in order to promote industrial change in a region

Strategy



Services



Value chain

Observation from cluster audits: Most cluster organizations do not yet develop value chains in a strategic approach!

Learning from World Bank project: proper analysis as basis for effective cluster strategy and services

Analysing the "Automotive" Industry (GVC Style)

1. What does the automotive industry consist of?
What are the different "businesses" that exist? Is it really as simple as 2-wheels, 4-wheels, trucks and autoparts?
2. What will the automotive industry consist of "tomorrow"?
What trends are we seeing, in which direction is the industry heading
3. What would it take to participate? To compete?
What would it take for any country / region to compete in any one of the business segments that we have identified?
4. What would it take for COUNTRY X to participate?
What do I have? What don't I have? What policy needs to change? What investments need to be made?

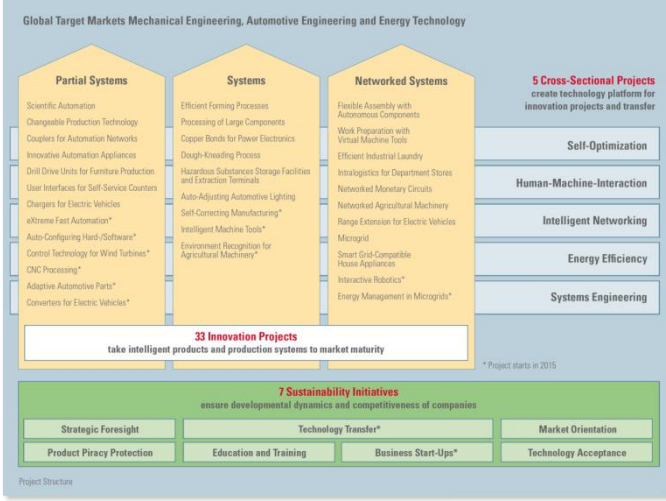
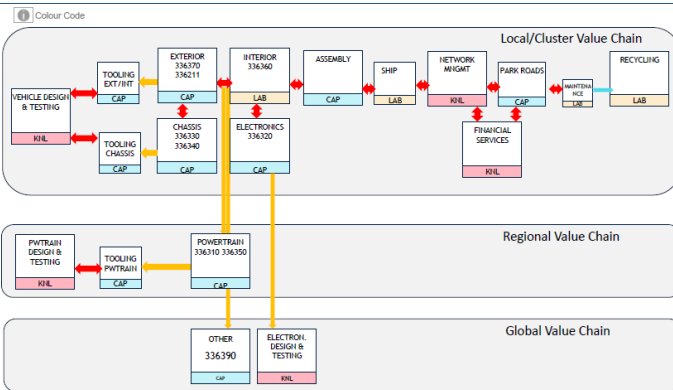


So the Automotive Industry (**both current and future**) is not segmented by engine size / wheel base / complexity but instead is a function of the density of the environment and the type of cargo...

		DENSE / URBAN / CITY ENVIRONMENT (OF THE NEAR FUTURE)	SPRAWLING / RURAL / SPARSELY POPULATED
Movement of People	Individual	Strategic Segment 1	Strategic Segment 2
	Groups	Strategic Segment 3	Strategic Segment 4
		INTRACITY	INTERCITY
Movement of Merchandise	Light	Strategic Segment 5	Strategic Segment 6
	Heavy		Strategic Segment 8



Ideal Value Chain Structure – 1. Movement of Individuals in Dense, Urban Environments



Project Structure

Q & A