

GLOBAL CLUSTER INITIATIVE SURVEY 2012

SURVEY SUMMARY REPORT

September 2012

GCIS Survey Summary Report

Assia Viachka
European Cluster Observatory

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Introduction

The Global Cluster Initiative Survey 2012 was first drafted in the beginning of January 2012. The initial draft was based on the previous GCI surveys, undertaken in 2003 and 2005. The survey questions were then adapted in order to reflect the evolution of clusters environment and to better address the topics of the day. This process was divided in several rounds where the questionnaire was first tested. Based on the feedback of the participants, the GCIS 2012 team modified the questions and the survey flow. The participants who tested the survey all had a significant background within clusters theory and/or clusters management. Furthermore, we ensured that they came from different parts of the world in order to accommodate for cultural differences.

The survey response collection process was entirely web-based. The survey was launched on April 03, 2012 and was closed on July 30, 2012. However, we received a number of questionnaires after the closing date, which we have also taken into consideration.

This report contains a summary of the survey responses received until August 31, 2012. Herewith, we will present the first results of the survey. On the next pages you will find a number of tables and graphs summarizing how the participants have answered on different questions in the survey. We have now started analyzing the data received and we will present our findings in the upcoming months.

In total, we have recorded 578 surveys, out of which 435 fully submitted questionnaires. Given the demanding nature of the questionnaire, we are very glad with these results. We are especially impressed by the extensive comments we received on the open-text questions. We consider these answers very valuable and we will analyze them thoroughly.

Report structure

The report follows the structure of the questionnaire. The results are presented in the order in which the questions appear in the survey. The answers of each question are summarized in a table or on a graph. The text of the question is presented in a gray box above each table or graph. Some of the survey questions were not suitable for the purpose of this report. They will be considered in the further analysis of the data.

The tables indicate the number of cluster managers who have answered a given question with “Response”. These numbers vary between the questions either because some participants have chosen to skip a question or because some of the answers were eliminated due to internal inconsistency.

We thank all survey participants for their kind contribution to this initiative. We are very grateful for your interest, enthusiasm and the generous feedback we received.

If you have any questions please do not hesitate to contact us at: survey@clusterobservatory.eu

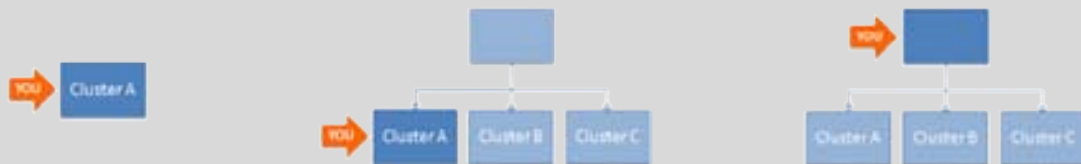
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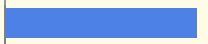

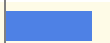
Survey manager








RESPONDENT BACKGROUND

Do you work for an organisation serving one, or several clusters?



#	Answer		Response	%
1	It serves a single cluster.		248	58%
2	It serves a single cluster in a group of clusters.		68	16%
3	It serves a group of clusters.		113	26%
	Total		429	100%

In total, how long have you worked with cluster initiatives?

#	Answer		Response	%
1	less than 1 year		35	9%
2	1 to 2 years		82	21%
3	3 to 5 years		134	35%
4	6 to 10 years		97	25%
5	more than 10 years		36	9%
	Total		384	100%

In your previous work experience, have you worked in any of the following sectors?

I have worked...

#	Question	Not at all	less than 1 year	1 to 2 years	3 to 5 years	6 to 10 years	more than 10 years	Response
1	...in the private sector (e.g. firms)	20	22	38	78	65	125	348
2	...in the public sector (e.g. national government; international, regional or local institutions)	92	21	36	49	38	32	268
3	...in academia (e.g. research and educational institutions)	80	21	37	51	26	41	256
4	...in financial institutions (e.g. banks, venture capital firms)	168	11	10	7	5	4	205
5	...in chambers of commerce, trade unions or similar non-profit organisations	119	13	18	36	29	26	241

The numbers indicated in the table show how many respondents have chosen each choice. For example, 78 people have said that they have worked between 3 to 5 years in the private sector. It can also be noted that most respondents have experience from the private sector (348 choices). Moreover, many respondents have been working for more than 10 years in the private sector (125 choices).

In your current position how often are you in contact with people employed...

Question	Never	Every year	Every quarter	Every month	Every week	Response
... in firms in the cluster	3	10	20	52	297	382
...in the public sector (e.g. national government, regional or local institutions)	4	10	38	112	215	379
...in international public institutions (e.g. European Commission, WTO)	54	91	124	78	27	374
...in research institutions (e.g. universities, research institutes)	3	28	49	130	170	380
...in educational institutions (e.g. schools, polytechnics, universities)	9	29	60	149	133	380
...in financial institutions (e.g. banks, venture capitalists, business angels)	49	90	118	98	22	377
...in other cluster organisations (e.g. in other sectors or outside the region)	7	37	78	159	96	377
...in international organisations (e.g. buyers, sellers, partners abroad)	24	73	119	112	50	378

This table is structured the same way as the previous one. It indicates the number of respondents that have chosen a given option. For example, it can be noted that in their daily work most respondents are in contact with firms in their respective clusters (382 choices). Moreover, the contact is mainly kept on a weekly basis (297 choices).

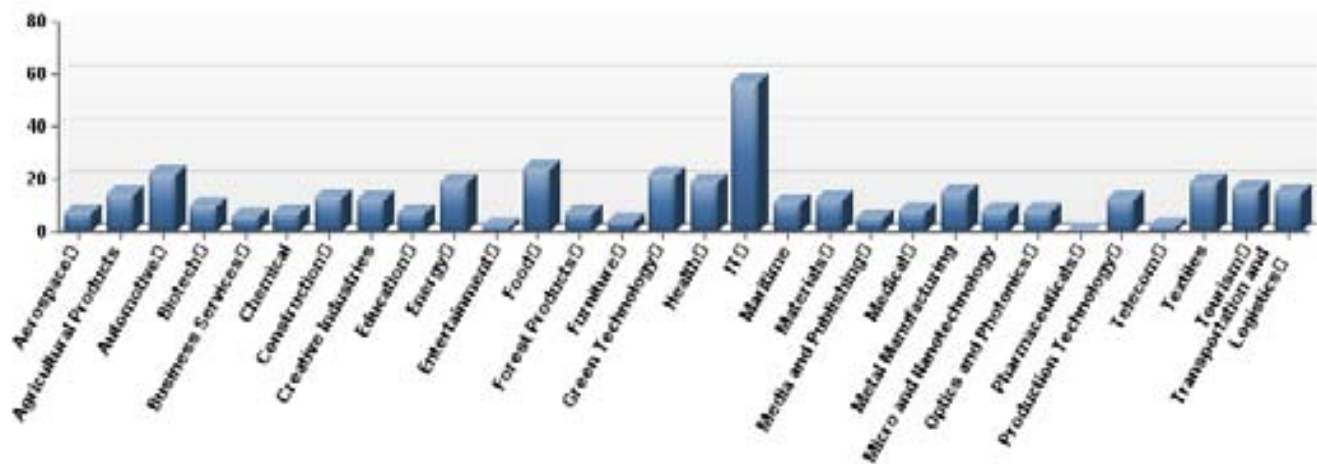
CLUSTER INITIATIVE PROFILE & ORGANIZATION

Does your Cluster Initiative have a website?

#	Answer	Response	%
1	No	48	13%
2	Yes, the web page is:	334	87%
	Total	382	100%


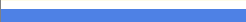


Below is a list of broad industry sectors.

Please select one that best describes your industry cluster.

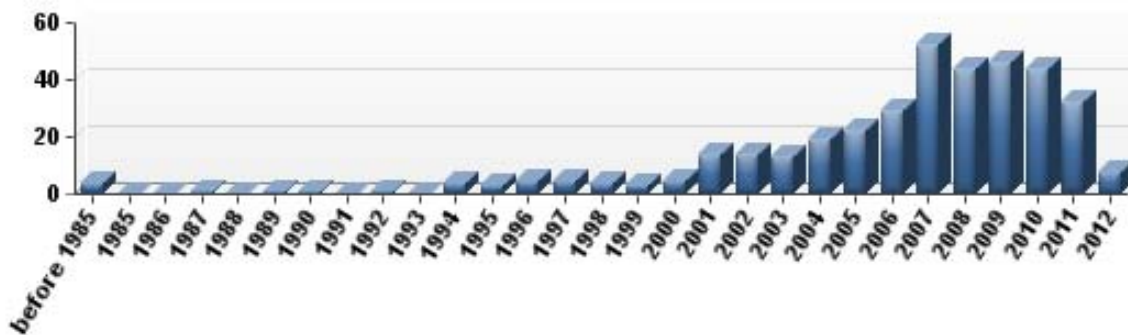


In this graph we have not included the answers provided as open-text where respondents have indicated sectors such as Green Tech, Clean Tech, Renewable Energy and so on.

What is the geographical scope of your Cluster Initiative?

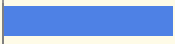
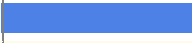

Answer		Response	%
local (city, city region)		42	11%
regional (sub-national region, province, state)		197	52%
national		92	24%
trans-national		51	13%
Total		382	100%

When was your Cluster Initiative started?



What was the original trigger for initiating the Cluster Initiative?









It was initiated as...

Answer		Response	%
...a response to a public call / policy program		136	36%
...a private sector initiative		149	39%
other:		93	25%
Total		378	100%

A lot of respondents have chosen to select “other” as an answer to this question. They have left us a lot of interesting comments regarding the initiation of their respective cluster initiatives. Many respondents indicated that their initiative has started as a public-private partnership or as a private initiative that grew into a public program. The role of non-profit organizations and academia are also underlined in many of the answers.

How many employees does the Cluster Initiative have?

Count half-time employees as 0.5 and round up.

Answer		Response	%
none		33	9%
1		51	14%
2		69	19%
3		61	16%
4		40	11%
5		31	8%
6 to 10		47	13%
more than 10		39	11%
Total		371	100%

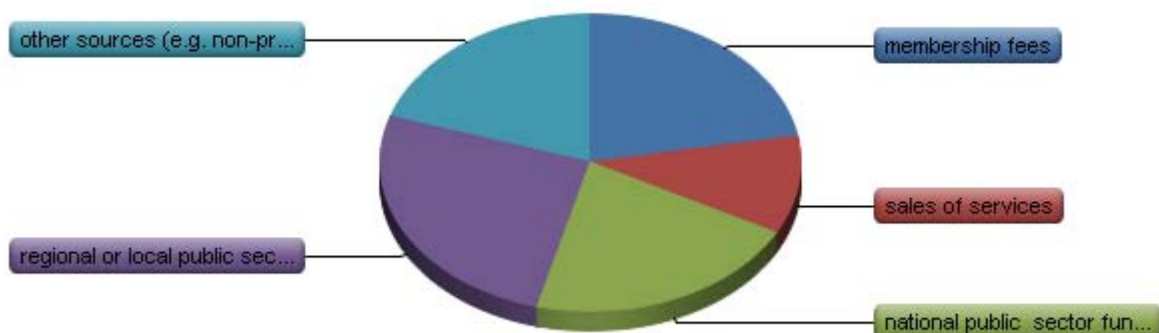
Is the Cluster Initiative today organised as a legal entity?

Answer	Response	%
No	134	35%
Yes	245	65%
Total	379	100%

For the last year, how was the Cluster Initiative's own budget funding split between the following types of sources?

This refers to the CI's own revenues. It is money that the CI receives and can decide how to best use for its purposes.

A rough estimate will suffice. The total should be 100%.



Also in this case, under the “other” category we found many interesting answers such as non-profit organizations, academia or private funding in the form of sponsorship.

In general, Cluster Initiatives can perform two types of activities:

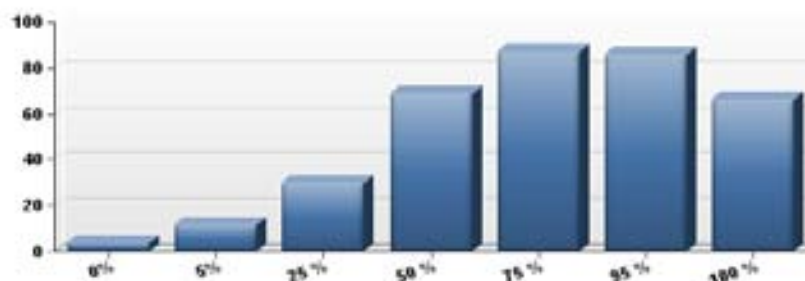
1. **services: the basic infrastructure for the organisation and on-going services offered to everyone** (E.g. the office, a website, a newsletter, monthly networking meetings, advice services, market intelligence updates, etc.)
2. **projects: time-limited activities for specific purposes involving only certain sub-groups of participants** (E.g. innovation projects, product development projects, export marketing task forces, etc.)

For the last year, what percentage of its budget did your Cluster Initiative spend on services and how much on projects?

A rough estimate will suffice. The total should be 100%.

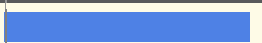









Approximately, what share of your cluster firms are within one-hour driving distance from your office?





The share of firms is indicated in percentage on the X-axis.

What are the rules regarding membership in the Cluster Initiative?

Answer		Response	%
There are no limitations		183	52%
Foreign-owned firms are not allowed (only domestic)		39	11%
Large firms are not allowed (only SMEs)		14	4%
Non-firm members are not allowed (only firms)		32	9%
Firms outside the "target region" are not allowed		76	21%
Competing firms are not allowed		5	1%
No more than a maximum number of firms is allowed		5	1%
Other limitations:		91	26%



The rules and limitations that we found under the “other” category often referred to innovation and R&D. Also, the general impression was that membership acceptance decisions are often taken on a case-by-case basis.

Do members appoint the main governing board of the Cluster Initiative?

Answer		Response	%
No		95	27%
Yes		260	73%
Total		355	100%

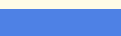

Many Cluster Initiatives provide exclusive services to a number of formal members.

Does your Cluster Initiative have formal members?

Answer		Response	%
No		97	27%
Yes, the number of formal members currently is		264	73%
Total		361	100%

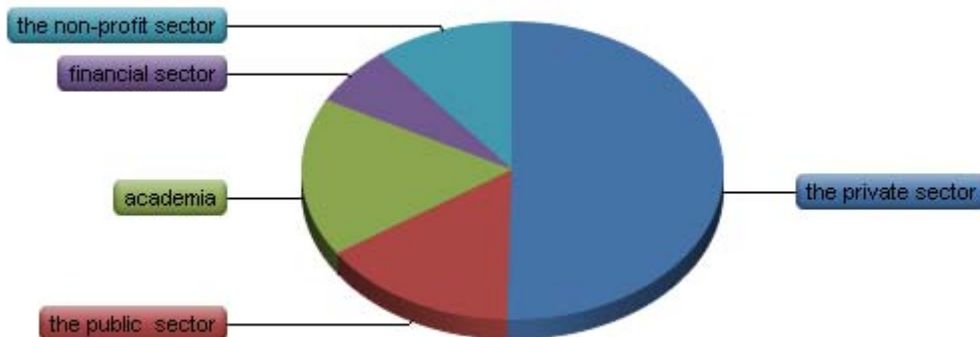
The number of formal members indicated when “Yes” has been select varies between one and two hundred.

Do any of your members pay a membership fee?

Answer		Response	%
No		98	34%
Yes, the number of paying members currently is		194	66%
Total		292	100%

In this case there were very big variations in the indicated numbers when the choice “Yes” was selected.

What is the background of the people in your main governing board?

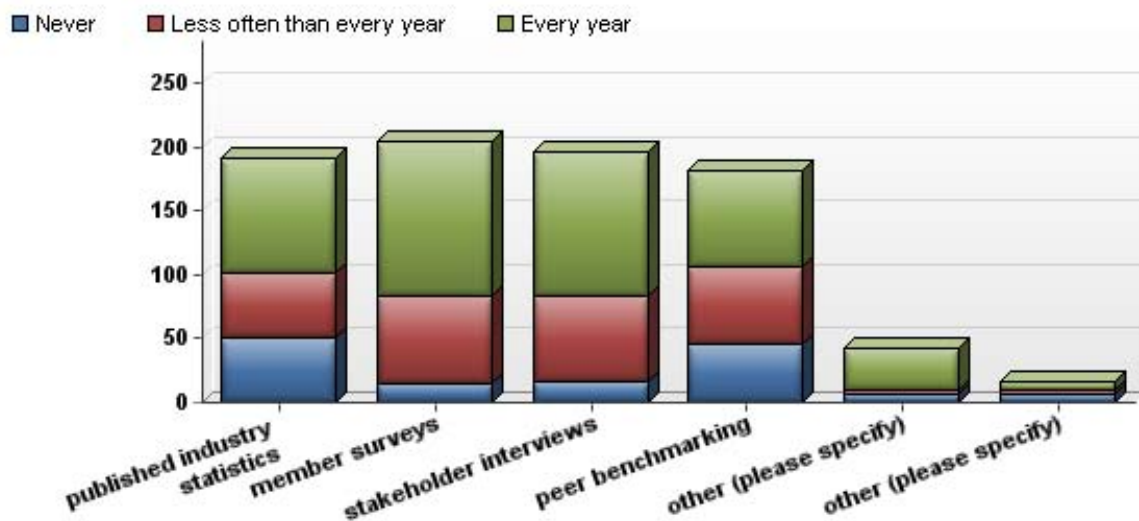


Is your Cluster Initiative subject to a formal evaluation program?

E.g. a formal evaluation for government funding.

Answer	Response	%
No	134	38%
Yes	220	62%
Total	354	100%

Do you use any of the following sources to evaluate the performance of your Cluster Initiative, and if so how often?



The graph shows how often cluster initiatives use the given evaluation methods. For example, we notice that member surveys are most often used even if the difference with the other methods is not too big. Moreover, member surveys are mostly used on an annual basis, shown in green on the bar.

Under the “other” category participants indicated tools such as balanced scorecard, public surveys and specific impact indicators. It seems that an external consultant, independent researchers or external auditors are often called to evaluate the performance of cluster initiatives.

CLUSTER INITIATIVE OBJECTIVES

In the last 3 years, what type of objectives has the Cluster Initiative focussed on?

Please select all relevant choices from the list below, reflecting each objective's relative priority.

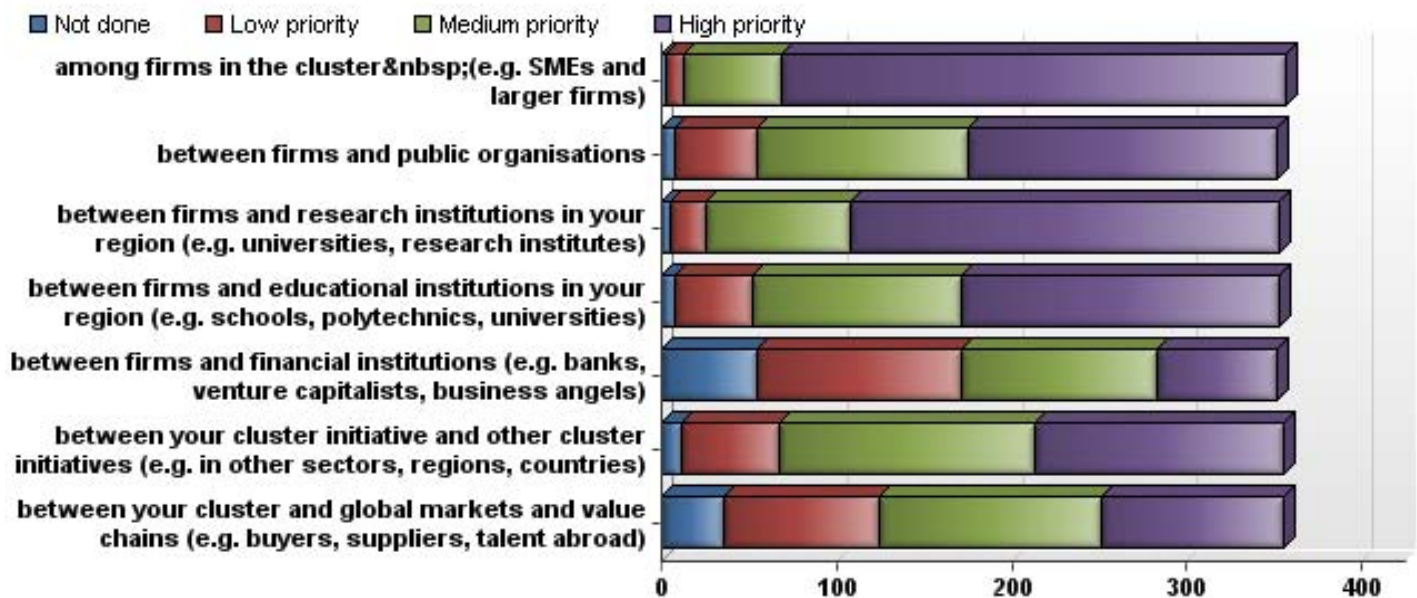
Question	Not done	Low priority	Medium priority	High priority	Response
R&D and innovation promotion	17	37	88	204	346
attract and secure supply of human resources (e.g. students, workers, engineers, managers)	39	79	126	100	344
upgrading existing human resource pool (e.g. training)	33	70	123	121	347
export promotion	52	68	103	122	345
cluster growth and investment attraction (e.g. incubator, attraction of FDI, entrepreneurship)	25	70	124	128	347
value chain development (e.g. upgrading suppliers)	40	84	117	108	349
joint purchasing	123	105	80	21	329
lobbying government for improved business environment (e.g. infrastructure, legislation)	29	52	118	148	347
building strategy and vision (e.g. market positioning, technology roadmap)	9	34	108	203	354
creating an identity for the cluster (e.g. cluster branding, sense of community)	4	28	100	222	354

This question includes also an open-text choice. The objectives that were most often mentioned by cluster managers referred to networking, internationalization and cooperation.

In order to reach its objectives, what types of collaboration does your Cluster Initiative promote?

Please select all relevant options from the list below, reflecting their relative priority.

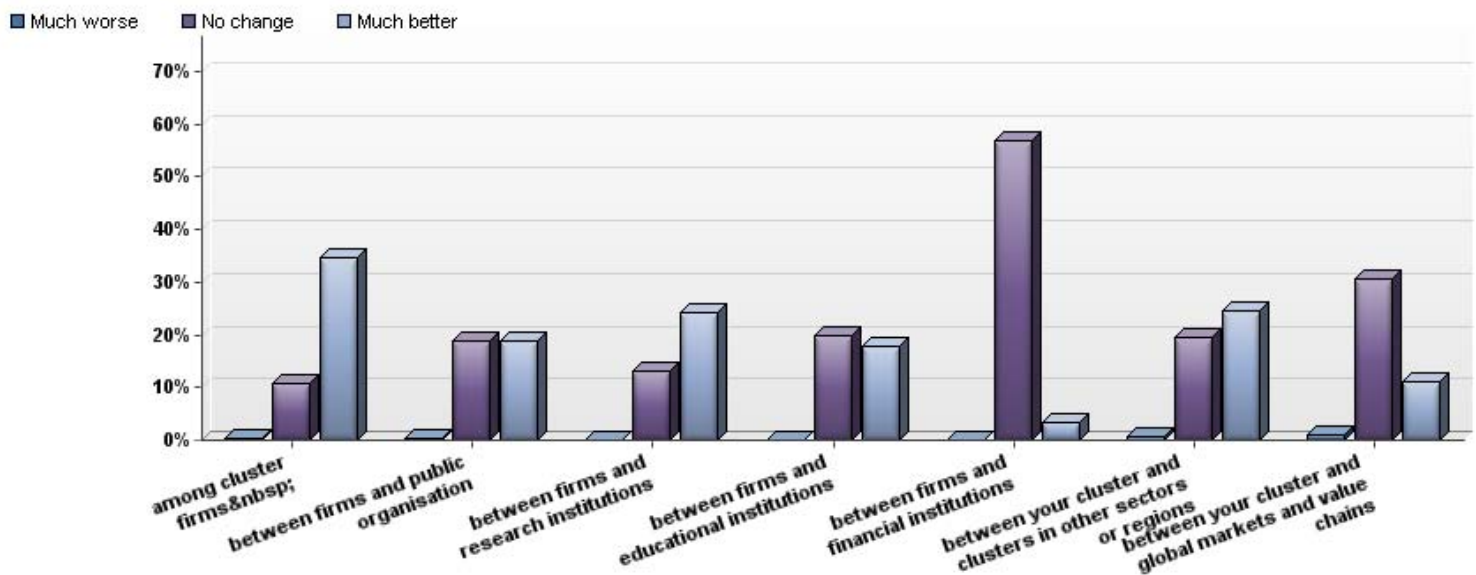
We promote collaboration:



The graph illustrates the relative priority of each choice, indicated with different colors on the bars. For example, we can see that the first choice (among firms in the cluster) has the highest relative priority among all options.

Over the last 3 years have your activities led to a change in interaction and collaboration?

Over the last 3 years, interaction and collaboration have become:

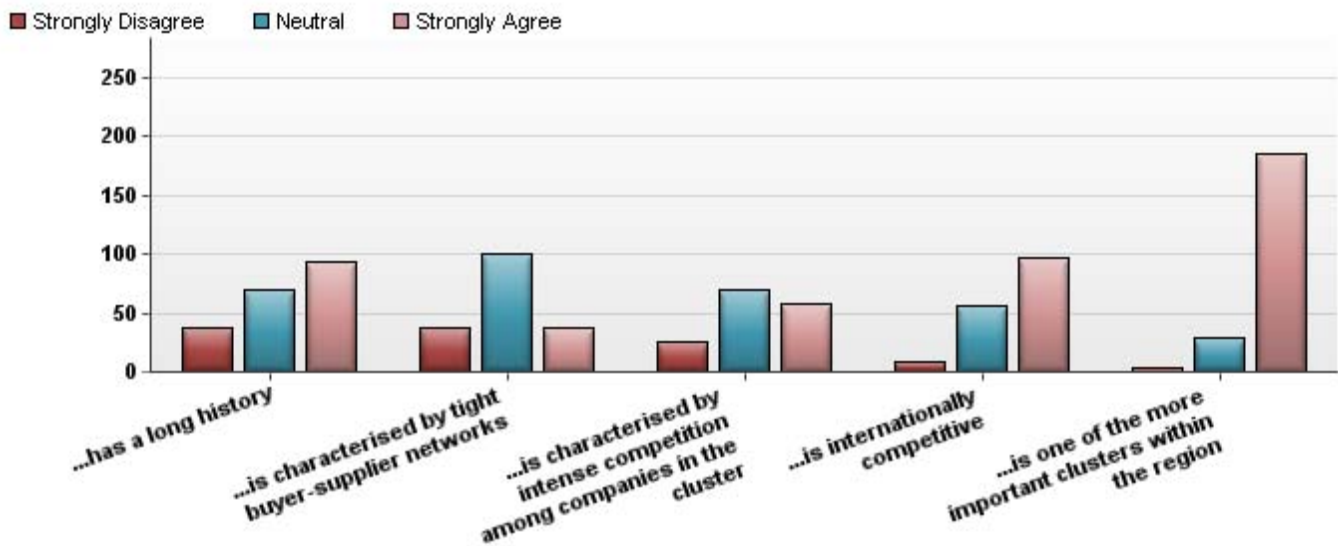


The perceived change in collaboration for each option is shown with different colors. One can note that, for example, many respondents have reported improvement in the collaboration among cluster firms (option one the X-axis) in their cluster. At the same time the collaboration between firms and financial institutions (option five on the X-axis) has mainly stayed the same.

REGIONAL ECONOMIC CONTEXT

Below we will make a number of statements about your cluster and its environment.
Please indicate whether you agree or disagree.

The cluster that the Cluster Initiative serves...



The general economic environment in my region can be described as follows:

