



23rd April 2013

International Forum World Class Clusters and Regional Dynamism



Final Conference **C-Plus** - *Implementing World Class Clusters in Central Europe*

Launch conference **CLOUD** - *Clusters Orientation towards Up-to-date technologies and models for common development*

C-Plus project is implemented through the CENTRAL EUROPE Programme. CLOUD project is implemented through the SOUTH EAST EUROPE Programme. Both co-financed by the ERDF.

International Forum World Class **Clusters** and **Regional Dynamism**

OUTCOMES AND FUTURE PERSPECTIVES OF INTERVENTIONS ON CLUSTERS

C-Plus Implementing world class clusters in Central Europe and
CLOUD CLusters Orientation towards Up-to-date technologies
and models for common Development

Marcella Contini

Bologna, 23th April 2013

International Forum World Class **Clusters** and **Regional Dynamism**

Definition of Clusters

Clusters are defined as “geographic concentrations of **inter-connected companies, specialised suppliers, service providers, firms in related industries and associated institutions** (f.e. universities, standards agencies and trade associations) in particular fields that compete but also co-operate”.

(European Cluster Observatory)

International Forum World Class Clusters and Regional Dynamism

C-Plus

Implementing world class clusters
in Central Europe and

International Forum World Class **Clusters** and **Regional Dynamism**

The Partnership

1. LP – National Confederation of Crafts and Small and Medium Sized Businesses - CNA Regional Association of Emilia Romagna (I)
2. Emilia Romagna Region (I)
3. IMU Institut Berlin GmbH (DE)
4. Campus 02 – University for Applied Sciences (AT)
5. Pannon Business Network Association (HU)
6. Center for research, innovation and regional development (CZ)
7. Regional Development Agency of Bielsko Biala (PL)

Duration of the project: March 2010 – May 2013

International Forum World Class **Clusters** and **Regional Dynamism**

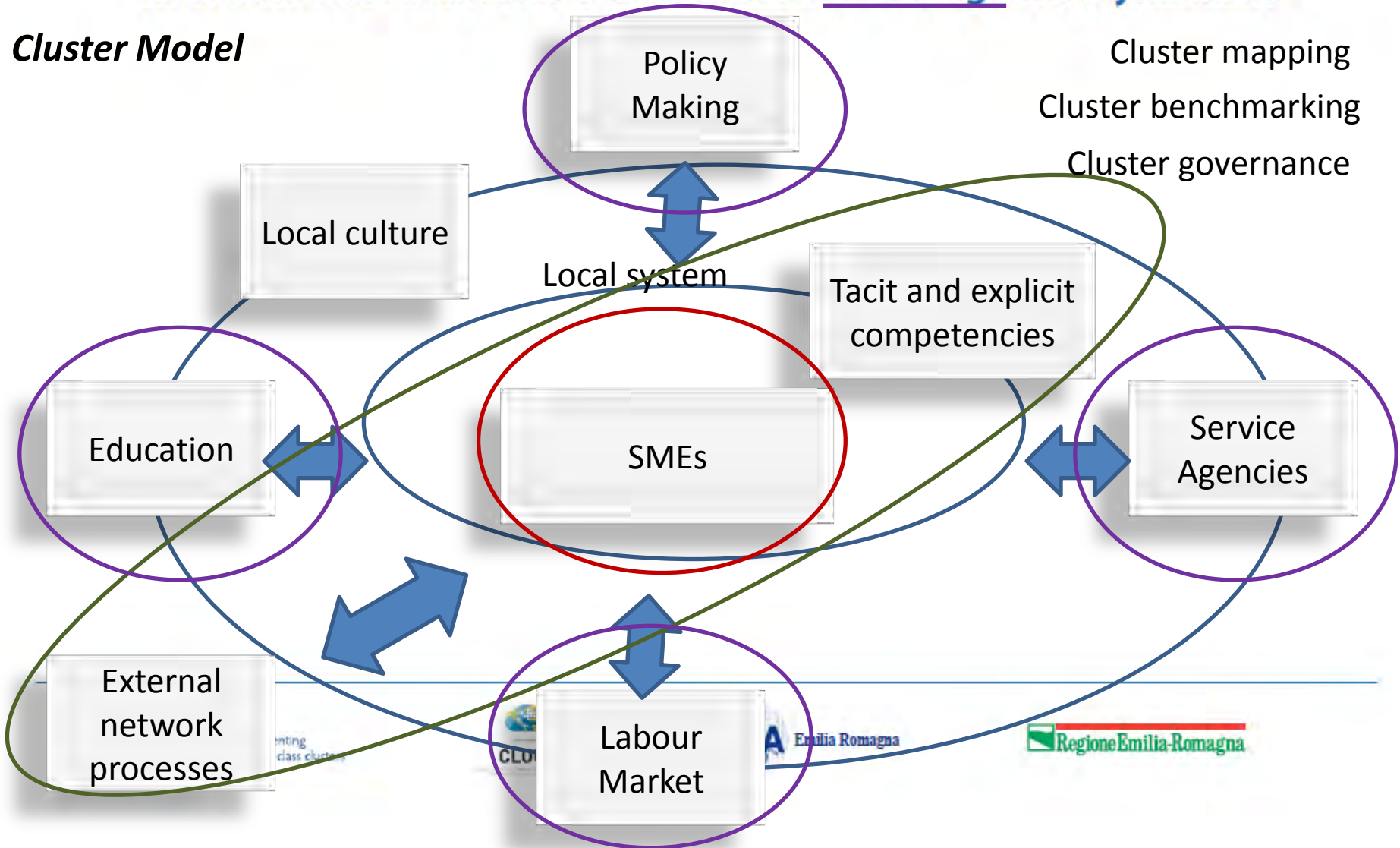
Project Goal

C-PLUS project aims at unlocking the **innovation** SMEs potential, through a more effective **governance of the Clusters dimension**.

Innovation cannot be based on research and technology development only, but all the actors involved in the innovation process have to collaborate (economic actors, research sectors and policy makers).

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Cluster Model



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Methods for Clusters' analysis

- **CLUSTER MAPPING:** back analysis on a statistical base
- **CLUSTER BENCHMARKING:** aimed at observing companies' macro processes, their ability to manage organization skills and their relations with the territory. The analysis of 50 companies per partner (25 per cluster) will allow to identify critical situations, but also to exalt the so called “good practices” potentially transferable to other contexts. (Target: SMEs)
- **CLUSTER GOVERNANCE:** in order to better understand the relational dynamics, the characteristics of the territorial system, the network relations and the local development policies through the involvement of all the stakeholders. One of the objectives is also “exploiting” this moment to start a concrete business-institution confrontation outside the formal and consolidated negotiating tables. 3 local mapping meetings per partner and the EASW methodology.

(Target: institutions, university, research centers, associations, service centers, ...)

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A picture of the situation

- ***The point of view of the cluster stakeholders (except SMEs)***

Local mapping meetings (3 focus groups per region to put *policy makers, intermediaries, local banks, research centers, service centers, local chambers of commerce* together. The focus group will be structured and supported by a simple tool that will help analyzing their role and activities for the cluster taken into consideration).

- ***SMEs' point of view***

Meetings with SMEs (one-to-one interviews to 25 companies per cluster to collect data through the benchmarking tools. The analysis will be managed by the facilitators).

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Capturing and fixing best practices

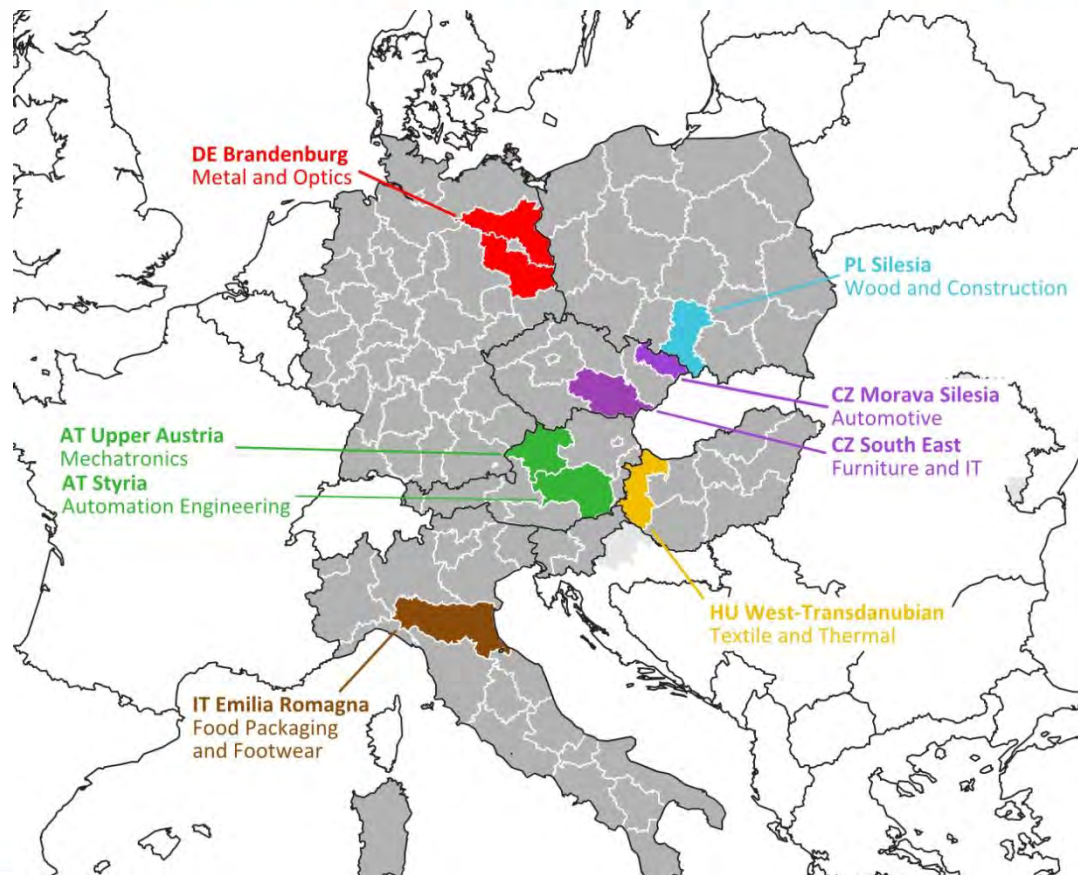
- 1 International Meeting to decide the characteristics and criteria for the **Multilingual international register** for the innovation leaders gathering.
- **“SMEs on Screen”** (At least 20 local meetings per PP for the videos creation and setting up. A minimum of 10 SMEs involved per PP).

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Planning and implementing the future

- **EASW (European Awareness Scenario Workshop) working groups setting up** (1 EASW per region. Each EASW envisages a series of meetings developed in 2 days composed by 4 working groups made of local stakeholders).
- **International meetings** (2 reunions where clusters managers will discuss about the operative implementation of the **Transnational Action Plan**).

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CLUSTER MAPPING:
12 investigated
Clusters in 6 Countries

CLUSTER
BENCHMARKING: **252**
companies analyzed

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*A picture of the situation
Statistical Mapping:
cluster overview*

	Cluster	Region [NUTS2]	Emp-loyees	Com-panies
Austria	Mechatronics	Upper Austria	5.346	282
	Automation Engineering	Styria	7.012	1.247
Czech Rep.	Automotive	Morava Silesia	10.249	83
	Furniture	South East	9.077	968
	IT	East	7.137	1.003
Germany	Metal	Brandenburg (†)	14.183	175
	Optics		2.321	40
Hungary	Textile	West-Transdanubian	2.514	39
	Thermal		3.115	35
Italy	Food Packaging	Emilia-Romagna	202.570	17.352
	Footwear		9.246	935
Poland	Wood	Silesia	9.500	1.065
	Construction		65.050	49.072

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	Cluster	Employees per Company [latest year]
Austria	Mechatronics	19
	Automation Engineering	6
Czech Republic	Automotive	123
	Furniture	9
	IT	7
Germany	Metal	85
	Optics	58
Hungary	Textile	64
	Thermal	89
Italy	Food Packaging	12
	Footwear	10
Poland	Wood	9
	Construction	1

***A picture of the situation
Statistical Mapping
Cluster characteristics:
Average Company Size***

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A picture of the situation

Benchmarking

The Sample of 252 SMEs

<i>Cluster name</i>	<i>Country</i>	<i>N. firms</i>	<i>% firms</i>	<i>Average firms' age</i>	<i>Average firms' size</i>
Mechatronics	Austria	21	8.33	26.29	372.15
Styrian Automation Technology Platform	Austria	24	9.52	18.29	169.67
Network Security Monitoring	Czech Republic	13	5.16	11.54	39.92
Cabinet Makers	Czech Republic	13	5.16	35.62	235.54
Steel and Metalworkingr	Germany	21	8.33	21.76	73.57
Optic alliance	Germany	22	8.73	16.55	19.45
Pannon Textile	Hungary	16	6.35	19.00	46.19
Pannon Thermal	Hungary	25	9.92	12.84	105.38
Val d'Enza Packaging	Italy	24	9.52	32.96	19.00
Emilia Romagna Footwear	Italy	25	9.92	23.56	44.84
Polish Wood	Poland	24	9.52	13.83	74.04
Energy-saving and Passive House	Poland	24	9.52	14.67	40.21
12 Clusters	6 Countries	252	100	20.29	98.94

Table n.1 – descriptive statistics of sample

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A picture of the situation Benchmarking Clusters and innovation

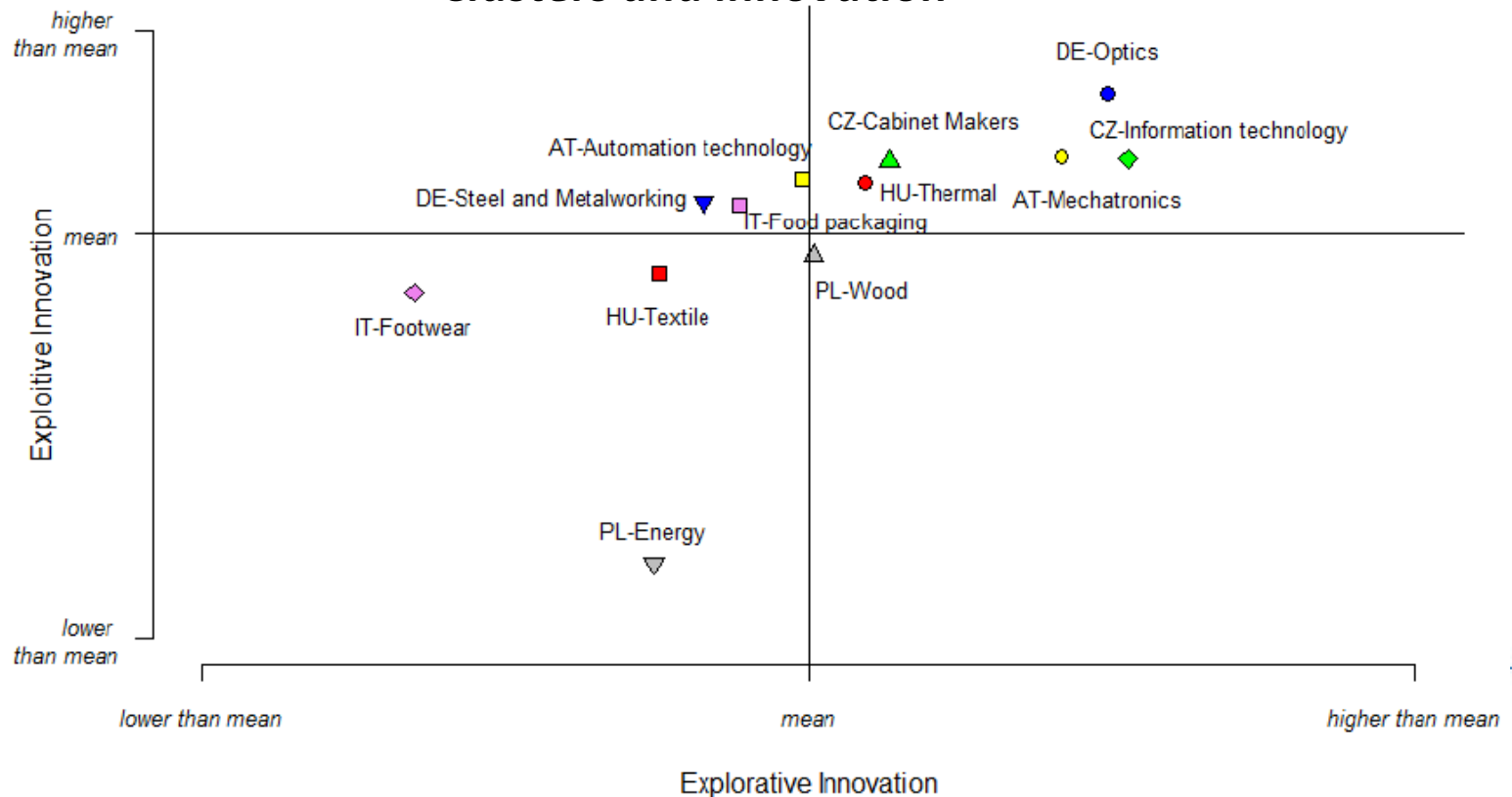


Figure n.2 – Clusters and innovation capacity dimensions (by using standardized average values)

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A picture of the situation

Benchmarking

Clusters and environmental dimensions

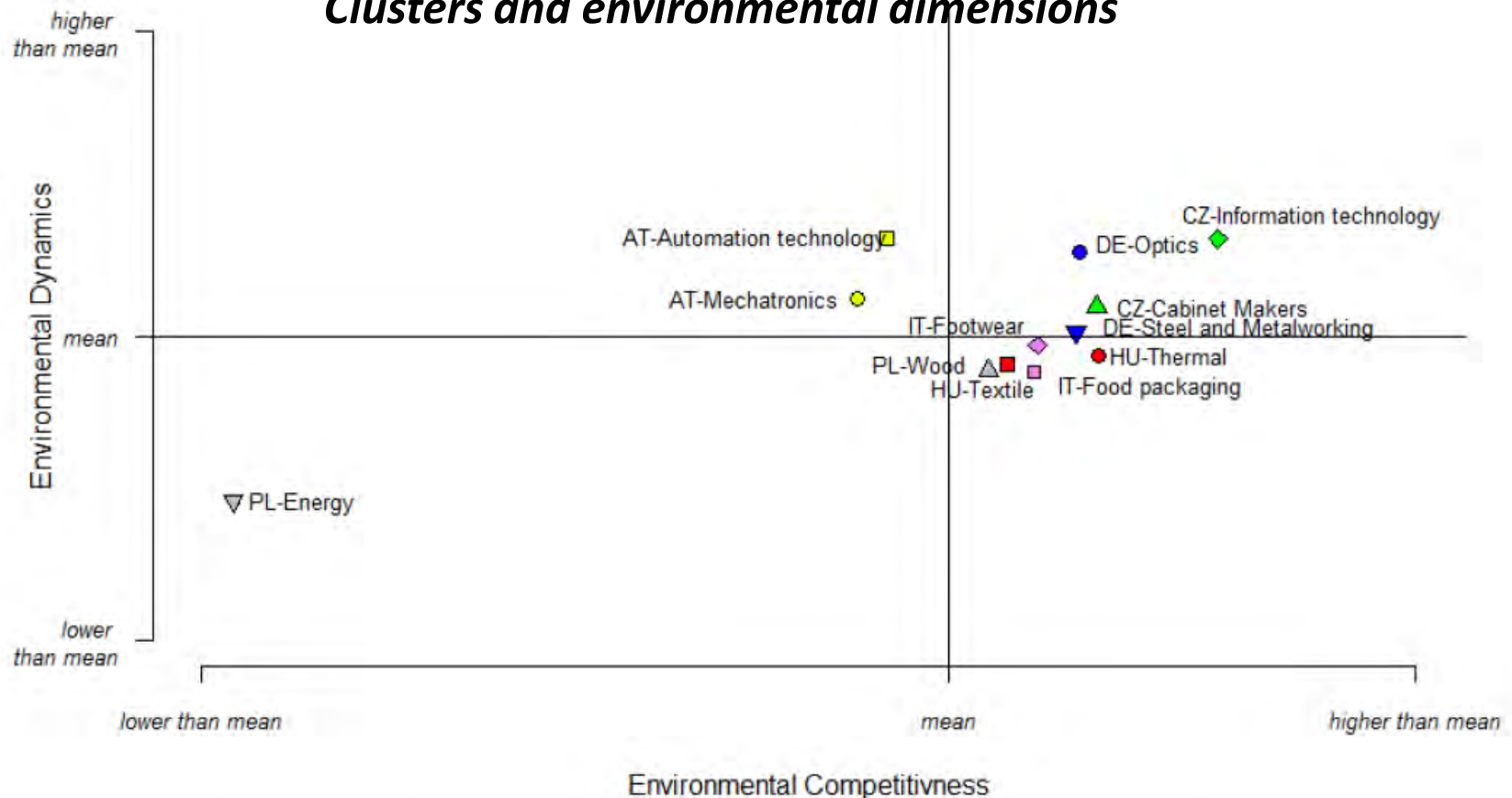


Figure n.4 – Clusters and environmental dimensions (by using standardized average values)

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A picture of the situation

Benchmarking

Clusters and trust and cooperation

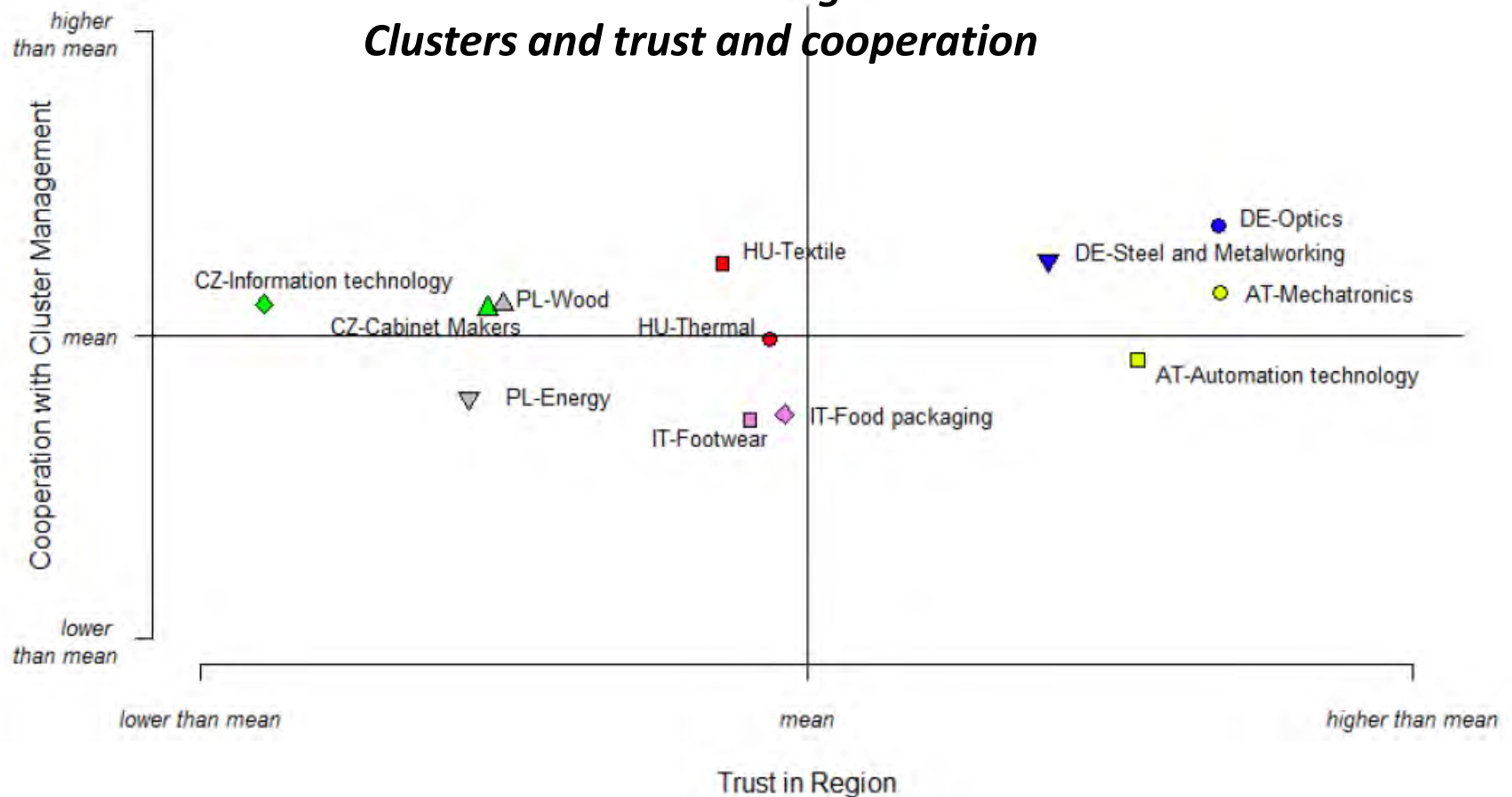


Figure n.5 – Trust and Cooperation within the clusters (by using standardized average values)

International Forum World Class **Clusters** and **Regional Dynamism**

Planning and implementing the future

The Cluster Management Professional Tasks

- **Identifying** and **integrating** cluster members
- Fostering **exchange** between cluster members (networking, socializing, trust building)
- **Strategy** development for the cluster
- Organizing **events** (e.g. seminars, conferences, study trips, info exchange, trade fairs), and
- **Networking** with stakeholders, lobbying
- Initiation, development and supervision of **B2B co-operation projects**
- Creating awareness of **promoting cluster policy** in the region

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Planning and implementing the future

The Cluster Management Professional Tasks

- Initiation, development and supervision of co-operating, **projects between companies and R&D facilities**
- Stimulating **innovation** in the cluster
- Organizing/securing **financing and funding**
- Carrying out **Public Relation** and **marketing** activities
- Initiation, development and supervision of **B2B co-operation projects**
- Development and implementation of **internationalization** strategy of the cluster
- Initiation, development and supervision of **international co-operation projects**

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Planning and implementing the future

TRANSNATIONAL ACTION PLAN

Pillar 1 Cluster Excellence	Pillar 2 Cluster Marketing	Pillar 3 Research & Innovation	Pillar 4 Foster Coop. inside Innov. Triangle	Pillar 5 Training & Education
<ul style="list-style-type: none"> • Action 1: Higher representation of relevant sector in the region • Action 2: Strong cooperation with key national/ int. stakeholders • Action 3: Common services and projects for cluster members • Action 4: Improvement of the cluster management and processes 	<ul style="list-style-type: none"> • Action 5 : Mastering of Cluster Marketing Activities • Action 6: Promotion of Clusters' Members Excellency • Action 7: Promotion of Cluster's region 	<ul style="list-style-type: none"> • Action 8: Fostering innovation inside Cluster's SMEs • Action 9: Set up Matchmaking Platform for Technology Transfer 	<ul style="list-style-type: none"> • Action 10: Facilitate cooperation across Innovation Triangle Actors 	<ul style="list-style-type: none"> • Action 11: Education of cluster members • Action 12: Match Students with Companies

International Forum World Class **Clusters** and **Regional Dynamism**

Val D'Enza Packaging Cluster: the Local Action Plan

- Cluster Management **Permanent Round Table** (meetings coordinated by the EASW facilitator)
- Exchanges between **foreign companies and local technical schools**
- **Enhancing technical training (focus on International Experiences) for local businesses**, in collaboration with technical schools, families, students and SMEs: **Open Day 11th March 2013**
- **Research Cocktail - 17 October 2012**



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Cluster management round table

The aim is to continue the dialogue with the stakeholders following the results of the workshop (EASW & Focus group WP5) to promote a form of coordination and governance at the institutional level and collaboration between institutions and enterprises on the one hand, and between universities, schools and companies on the other.





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Enhancing technical training for local businesses

2 Open Days open to families and students, local SMEs and local network between the different stakeholders.



International Forum World Class Clusters and Regional Dynamism



The area of Val d'Enza is located between the provinces of Reggio Emilia and Parma in the Emilia-Romagna region. Its long tradition of mechanics and food production, dating back to the early 1900s, has meant that it has become an area that focuses on the production of equipment for the mechanisation and automation of agrofood enterprises and packaging. The district comprises over 450 small and medium-sized enterprises that employ nearly 5,000 workers, all of whom are local. The enterprises of Val d'Enza have long-standing reputations for successfully exporting plastic, metal and glass containers. Its main sectoral clients are the agrofood, pharmaceutical, cosmetic, chemical and petrochemical industries.

The industry has been enhanced by the production of machinery including electric and electronic parts that are used to control the automation and efficiency of production lines. The area's success is down to several strategic strengths, the first being its high level of productive flexibility that is achieved through an efficiently integrated system of specialists and a network of specialised subcontractors. Secondly, the focus on customer satisfaction, complemented by strong networking activities, has allowed enterprises to provide customised products and a good after-sales service. In order to remain competitive in a global market, companies have also invested in research and development.

In Val d'Enza there are specialised vocational schools, management service centres, and entrepreneurial associations that work hand in hand with the packaging firms, thereby ensuring that the skills of the workforce are constantly updated and guaranteeing progress in the use of new technology and research in new foreign markets. In fact, exports of agrofood packaging from Emilia-Romagna increased considerably in the first three quarters of 2011 with respect to the same period in the previous year. China, the United States and France have been the main importers of automated machinery for packaging.



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Monteccheto Emilia (Reggio Emilia)
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CLUSTER 2 AGROFOOD PACKAGING IN VAL D'ENZA



Field of activity:
manufacturing of rolled iron and steel by laser cutting

Special characteristics:
company success based on a specific approach of
storehouse optimisation

Bottazzi S.r.l. specialises in the production of rolled iron and steel using the laser cutting method, and has acquired long-term experience in the field of furniture and household appliances. The company strategy focuses on different types of clients, ranging from small-scale orders to the provision of voluminous supplies. It implements the Kanban system – an approach usually adopted by large companies – which has enabled this small company to achieve the perfect optimisation of the storehouse, thereby rendering production efficient and effective.

Throughout the years, the company has been able to cover the entire production cycle starting with the purchase of raw material and culminating in packaging the final product. By focusing on flexibility, the company ensures the best service, product quality and short delivery times to all its customers.

The production process is administered using management software that allows the company to provide detailed information, whilst focusing on machine loads and delivery times. This method of organisation allows for the handling of both small orders and large-scale repeat contracts.

This has been made possible only thanks to considerable investments in high performance machinery which allows the company to reduce cycle times, renders production time-efficient and reduces energy consumption by up to 90%. The continuous use of highly innovative machinery requires a qualified personnel which is constantly trained to maintain the high standards of quality and service for the benefit of the company's customers.

G-PLUS statement:
"innovation with a special focus on the environment"
with individual solutions for industrial plants"



Number of employees:
19
Year of foundation:
1975

Headquarters:
Gatta Itro

www.bottazzisrl.it

BOTTAZZI SRL



BOTTAZZI SRL
Via Zappellazzi 9/11
42043 Gattatico
Italy

Phone: +39 0522 670211
info@bottazzisrl.it

Field of activity:

production of electrical wiring for electronic and electromechanical devices

Special characteristics:

a new business strategy supported by considerable investment in research and innovation

Elettromeccanica F.lli Fico was founded in 1989 by Giuseppe and Giovanni Fico and operates in the field of electromechanics and subcontracting. To respond to the ever-changing needs of the market, the company decided to specialise in the field of electrical wiring and electromechanical assembly. Recently, the management has launched a project which enables the company to directly provide wiring, with specialist moulding in ABS, nylon, Santoprene, PVC, Hytel, Macromelt. This has allowed the company to expand its business to specific foreign markets and to find new economic resources to reinvest into research and innovation.

Customer satisfaction and service is of the utmost importance for Elettromeccanica F.lli Fico. Short delivery times, custom-made manufacturing, tailor-made products, innovative research and alternative solutions, as well as traceability, consignment stocks and buffer stocks are all part of the company's strategy to facilitate and optimise customer-supplier relationships. In order to accomplish these goals, the company has implemented a modern computer network and software that processes, provides and monitors all the necessary data.

C-PLUS statement:

"We are determined to find a new core business through innovation and constant investment in research"

**Number of employees:**

37

Year of foundation:

1989

Headquarters:

Montecchio Emilia

www.fratellifico.it

Field of activity:

production of cheese processing machines

Special characteristics:

a real and profitable partnership with customers to develop innovative solutions

Filippini has been designing and manufacturing cheese processing machines for more than 35 years, and is continuously strengthened by its own patents and innovative technologies. Filippini produces a wide range of machines for cutting and portioning stations for the production of grated cheese and for automated (seasoning or aging) warehouses.

The wide range of machines enables the company to satisfy all kinds of processing and production requirements, for all kinds of cheeses, by offering targeted solutions that ensure the highest yields and reduce processing costs. The machinery is produced directly at the company's factory by highly specialised technicians who are able to deliver the best solutions available.

Throughout the years, this strategy has allowed the company to achieve international success and to gain an important share in a competitive market where innovation and continuous research are required in order to fulfil clients' needs.

C-PLUS statement:

"The constant search for innovative and creative solutions, in collaboration with the clients"

**Number of employees:**

15

Year of foundation:

1969

Headquarters:

Corte Toggia, Carrigo

www.filippomacchineperformaggi.it

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International Forum World Class **Clusters** and **Regional Dynamism**

San Mauro Footwear Cluster: the Local Action Plan

- **Footwear Cluster Brand** creation and promotion in collaboration with students, technical schools, University, Cercal, banks
- Footwear Cluster Web Portal - promotion on Social Networks
- **From Productive Clusters to Technological Clusters** (3 SMEs Networks + 3 Researchers) in collaboration with Regional Government and University
- **Enhancing technical training (focus on Human Resources Competencies) for local businesses**, in collaboration with technical schools, families, students and SMEs: **Open Day 10th May 2013**.
- ***'Notte dei Ricercatori'*** Research Cocktail – 28th September 2012

International Forum World Class Clusters and Regional Dynamism



The manufacturing district of San Mauro Pascoli is located between the towns of Forlì and Cesena in the Emilia-Romagna region. The district is home to 200 enterprises – mostly small enterprises and a few market leaders – that employ over 3,000 workers. Its main products are high-end leather footwear and shoe components sold by world-famous luxury fashion houses. The cluster's main characteristics are quality products and a highly-skilled workforce, along with the creation of a strong brand positioning and an elaborate distribution network.

Most of the area's enterprises chose to preserve the integrity of the production chain and to centralise the productive process, which encourages skilled artisans to work in assembling. As a result, these strategic choices have contributed to outstanding quality and have prevented outsourcing of the production of shoe components to low-cost countries.

In this way, enterprises have placed special emphasis on innovative design and high-quality components instead of focusing mainly on lowering production costs and costs of primary materials. Moreover, innovation and quality are also enabled by the presence of and close interaction with an industry-specific research centre which supplies enterprises with updated technical know-how and training for employees. Therefore shoe manufacturers have been able to offer a new value proposition and, thereby, are one step ahead of their competitors whilst weathering the economic crisis.

In 2009, exports of shoe products plummeted mostly due to a sharp decrease in sales in Russia – the cluster's primary export market. However, in 2011 exports from San Mauro Pascoli recovered to pre-2009 levels, and the markets in Switzerland, the United States and China have shown positive signs for the future.



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www.cercal.org

CLUSTER 1 SHOE MANUFACTURING IN SAN MAURO PASCOLI

cercal

Field of activity:

laser engraving, micro-injection and processing of soles, uppers, leather, fabrics, metals and other materials for footwear

Special characteristics:

sophisticated business activities (thanks to advanced machinery and research)

Castellani specialised in injection processing on leather and was one of the first companies to embark on the injection into soles using photolithography, also used soon after for all milling processes. It was in its shop, which is equipped with state-of-the-art injection technologies, that the various soles with non-slip rubber, non-slip inserts of all sorts, and very thin soles were created.

The company is also highly specialised in the use of CO₂ laser markers for the processing of soles, uppers, leather, fabrics, metals and many different materials. The use of the most advanced laser technology reduces processing times to a minimum and enables work to be performed with great precision, definition and flexibility when cutting and making contours.

With regard to micro-injection, in 2003 Castellani Laser patented an innovative rubber sole that allows for a very low thickness insertion that can be matched to "zero-bottom" leather soles, typical of the most stylish women's footwear. This important innovation, created 10 years ago in response to customer demand, marked a turning point for the company. Since then, Castellani has actually been the most specialised company in the cluster for this type of work and over the years the technique has been perfected. This year the company introduced a new machine which is one of its kind in the national technology industry, and allows various processes to be combined enabling absolute accuracy to be achieved in one single step.

The company has been fundamental to the growth of the cluster as it triggers a copycat effect in other local companies, having a positive influence on the whole region. Therefore "strengthening the territory", rather than making individual companies successful must be the cluster's objective: a win-win approach for the area as a whole.

Castellani supplies materials, products and processes to companies that in turn produce goods for high fashion houses such as Chanel, Louis Vuitton, Christian Dior, Giorgio Armani, Salvatore Ferragamo and Sergio Rossi, to name but a few.

C-FL US statement:

"Technological innovation and research: the company is a landmark for the entire cluster"



Number of employees:
23
Year of foundation:
1997

Headquarters:
Savigliano sul Rubicone

www.castellanilaser.it

CASTELLANI



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Field of activity:

design and production of heels, shoe soles, platforms and other shoe accessories.

Special characteristics:

innovative products for demanding customers.

The company began in its original form in 1970 as a handcraft business where craftsmen, with the sole use of files, stucco and sandpapers, created a small number of entirely hand-made prototypes of heels and shoe soles, laying the foundation for becoming the market leader in this sector.

C.B.R. Tacstile as we know it today was actually set up in 1994. C.B.R. Tacstile is a well-structured company with a very good reputation in Italy and worldwide that it has achieved by promoting the beauty and quality of "Made in Italy" products to leading designers and footwear manufacturers. Continuous development and innovation, accompanied by the testing of new and increasingly advanced production techniques, allows the company to operate in the market with a variety of products. By using the latest generation of rotary presses and employing highly-qualified personnel, C.B.R. Tacstile is able to guarantee high-quality production and service.

C.B.R. Tacstile is a solid and dynamic company that strongly believes in technological development and in continuous research in order to produce outstanding products.

The company has the capability to complete and deliver large orders within short periods of time, as well as to satisfy small and mid-sized orders for: A.B.S., polystyrene, neoprene or PVC heels, shoe soles, platforms and other shoe accessories; fine wood heels and bases, plastic lattice shaped heels; single and bi-component heel counters and metal heels. By using a wide range of 3D software and technologies, the company is able to shape all kinds of ideas and to create very complex products that are impossible to make with traditional tools alone. It also provides an analysis and research service for materials and design techniques regarding a variety of product finishes to make them stylish and trendy.

One of the company's strengths lies in the close collaboration with skilled technicians and in the joint development of customized projects.

C-PLUS statement:

"We foster knowledge exchange and close collaboration to develop innovative products in response to the increasingly complex needs of designers."

**Number of employees:**

24

Year of foundation:

1994

Headquarters:

San Mauro Pascoli

www.cbr-tacstile.com

C.B.R. TACSTILE SNC DI CHIAUZZI GIANNI E BRANCATO ANTONIO



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Phone: +39 0541 932023
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info@cbr-tacstile.com

Field of activity:

manufacture of heels and accessories for women's footwear

Special characteristics:

high level business thanks to advanced machinery and research

Since 1914 Tacchificio Zanzani has been designing, manufacturing and selling components and accessories for women's luxury footwear.

Its select customer base, which includes the best "Made in Italy" brands, highly values the quality of the company's service that turns customer input (while always respecting the strictest confidentiality) into a project in real-time and, immediately afterwards, into a prototype.

The advanced technology used includes 3D lasers to capture mathematics from a real object, rapid prototyping that mixes plastic powders and photopolymerization with liquid plastic which allows the product to be made without using a mould. This way, the shoe designers can immediately see their ideas with their own eyes, thus checking if the product complies with the design, change it if necessary and go on to develop it.

The company has based its strength on innovation; in fact it constantly searches for innovative technologies for the digitization of materials and the creation of 3D models for the early viewing of the product in high quality.

Besides ensuring consistent quality, this technology allows technical and stylistic research to be realized outside the specific field of activities too, and enables the previously unfeasible production of objects - due to the limits of geometries, the sub-frames, etc. - to be realized.

The company's commitment to hard work, research and technological development, as well as the use of advanced design, graphics and automated modelling applications, together with the craft development of prototypes enables the company to meet the demands of its clients - high-end companies.

C-PLUS statement:

"An innovation leader in 3D prototyping to serve the market of luxury footwear."

**Number of employees:**

30

Year of foundation:

1914

Headquarters:

Savignano sul Rubicone

www.zanzanifl.com

TACCHIFICIO ZANZANI

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International Forum World Class **Clusters** and **Regional Dynamism**

CLOUD

Clusters Orientation towards Up-to-date technologies and models for common Development

The Partnership

1. Development Agency of Evia S.A - DAE, GREECE
2. Executive Agency for Higher Education Research, Development and Innovation Funding, ROMANIA
3. Start-up & Service Centre - GZSZ, AUSTRIA
4. Business Agency Association, BULGARIA
5. Pannon Business Network - PBN, HUNGARY
6. Unioncamere Veneto , ITALY
7. Pomurje Technology Park, SLOVENIA
8. Belgrade Chamber of Commerce - SERBIA
9. Sarajevo Economic Region Development Agency - SERDA, BOSNIA AND HERZEGOVINA
10. Institute for Contemporary Studies, ALBANIA

Duration of the project: December 2012 – September 2014

International Forum World Class **Clusters** and **Regional Dynamism**

CLOUD Main Activities

- Identification of the **Clusters Hubs**
50 companies per Partner to submit the benchmarking questionnaire and to populate the web platform.
- **Benchmarking Data Analysis and Global Data Report**

International Forum World Class Clusters and Regional Dynamism

The Sectors of the involved Clusters

- Tourism
- Wood
- Apparel Textile and Leather
- Machinery for agriculture and food industry
- Renewable energy
- Thermal
- Lighting
- R&D Technology transfer
- Agriculture
- Food and wine (including also Prosecco Cluster)
- ICT

International Forum World Class **Clusters** and **Regional Dynamism**

The next steps...

- **GOPP (Goal Oriented project Planning) Sessions**
- Cluster Managers and **Cluster Club in Action** for the Future
- **Pilot Actions** Implementation in each Country
- **Collaboration with IT and new technologies** IT effective introduction Case Studies

International Forum World Class Clusters and Regional Dynamism

An example: The Footwear Cluster of San Mauro Pascoli



International Forum World Class **Clusters** and **Regional Dynamism**

Thanks for your attention!

Marcella Contini

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