

# User Expectation Survey Summary Report: Cluster Organisations

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## 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.

Since both projects planned to make a pan-European survey to identify the needs and expectations of the cluster management staff in regard to the Collaboration Platform and the European Club of Cluster Managers, we decided to merge the two themes in one survey, in order to create synergies and mobilize common efforts to contact the respondents.

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.

1. The development phase consisted of a workshop to brainstorm the potential structure of the platform as well as a structure for the questionnaire, research and collection of contacts and contact-providers for cluster organisations in Europe, various feed-back loops with partners and the EC regarding the contents and form of the questionnaire. A test of the questionnaire was made at the TCI conference in Jyväskylä in October and improved afterwards, with the inclusion of the questions regarding the Cluster Managers Club.
2. We evaluated the two options for sending out the questionnaire: in an on-line version or in a classical form (word or link for download). The preparation of an on-line version in a qualitative and professional manner was in the short time not possible, this is why we went forward in the classical way.
3. The analysis followed very quickly in a summarized form, where the percentages of the answers helped us prioritising the functions and benefits expected from the platform. This first version of the analysis was circulated among the partners and the EC in January. A second analysis followed in this paper, bringing additional details regarding the structure of the respondents, their countries of origin and related sectors.

## 2 Respondents

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).

According to the application, it was planned that the survey is addressed both to cluster organizations and to cluster members. It was particularly difficult to assess the situation of how to involve the cluster members (enterprises, research units, universities) in this process at this early stage. Based on discussions with different cluster organisations, it clearly came out that involving the cluster members at this development stage and within the extremely short time at our disposal would not be feasible in the expected quality and quantity without major efforts from the cluster organisations. However, since

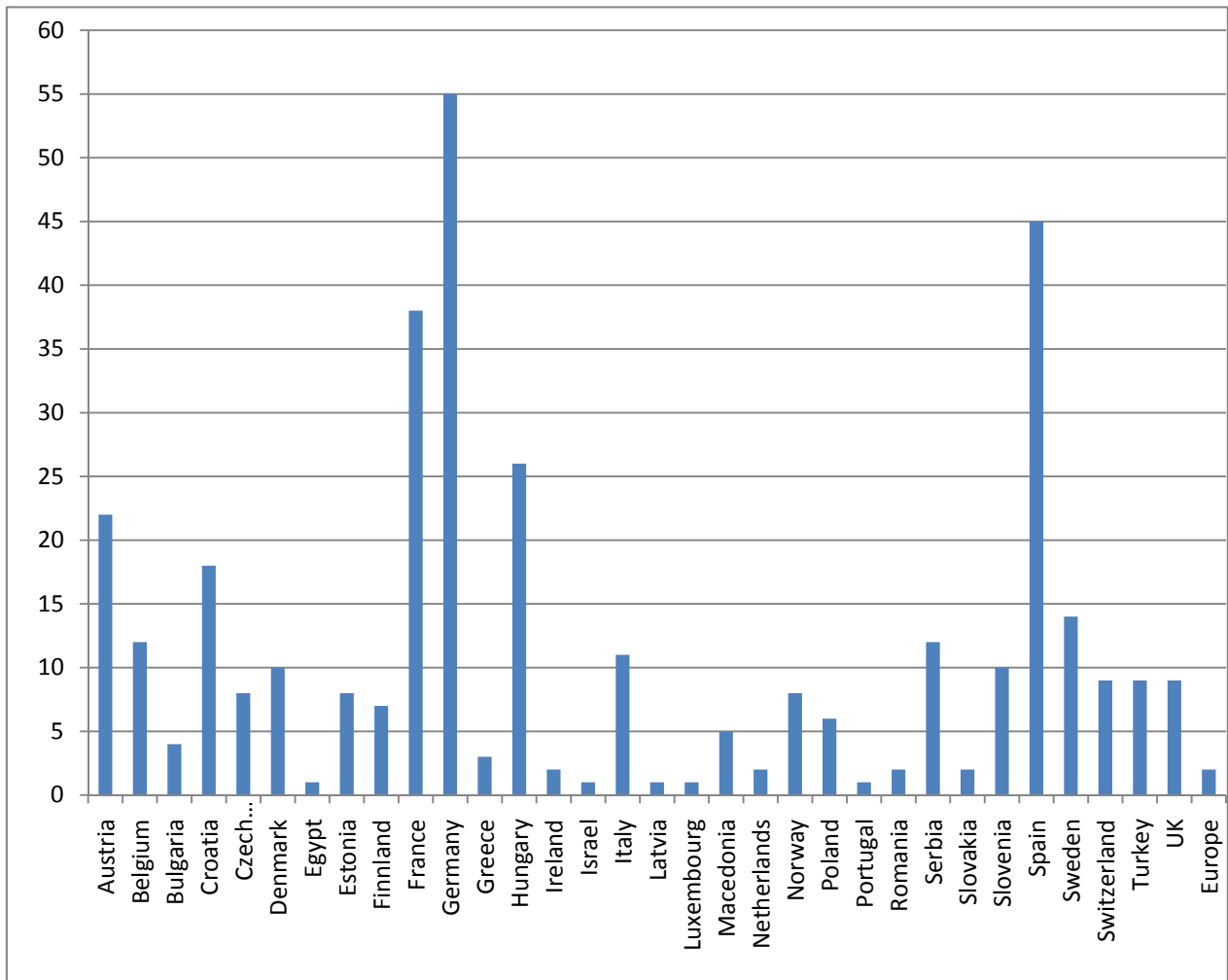
the concept of the platform was new for these as well, we felt their reluctance to engage in this process at this moment. This is why it was decided to concentrate in a first step on the cluster organisations and identify how they feel about the involvement of their members: do they estimate that profiling vs. simple listing could work also in the case of the cluster members and how do they estimate that the profiles will be completed (by the member themselves or by the cluster organisation, as a service for their members).

We were impressed not only by the numbers, but also by the quality of the answers. In most cases, the respondents provided complete information concerning the person in charge with position, contact data, as well as the sectoral belonging. We answered each respondent personally (with the exception of the Jyväskylä questionnaires, where few contact addresses were given), thanking for the answer and promising to provide personally the results of the survey, as well as keep the future users updated on the further developments. This activity will be completed before the end of March 2010. An important value of the answers lied not only in providing the answers to the questionnaire, but 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).

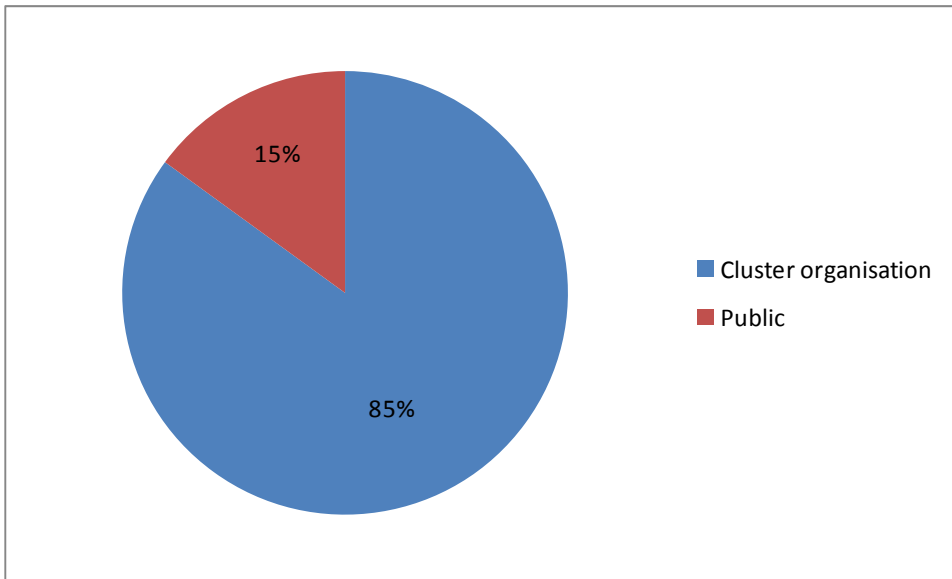
An important role in mobilizing the cluster community played the EEN network, activated by Zenit. The network consists of more than 600 partner organisations, many of these coordinating also cluster structures or working actively with cluster organisations or actors. The involvement of EEN at this stage was important not only for enlarging the spectrum of respondents, but also for creating a collaborative bridge between the Collaboration Platform and EEN for the further future developments.

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 activated 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/UK have for sure more than 11/9 of them.

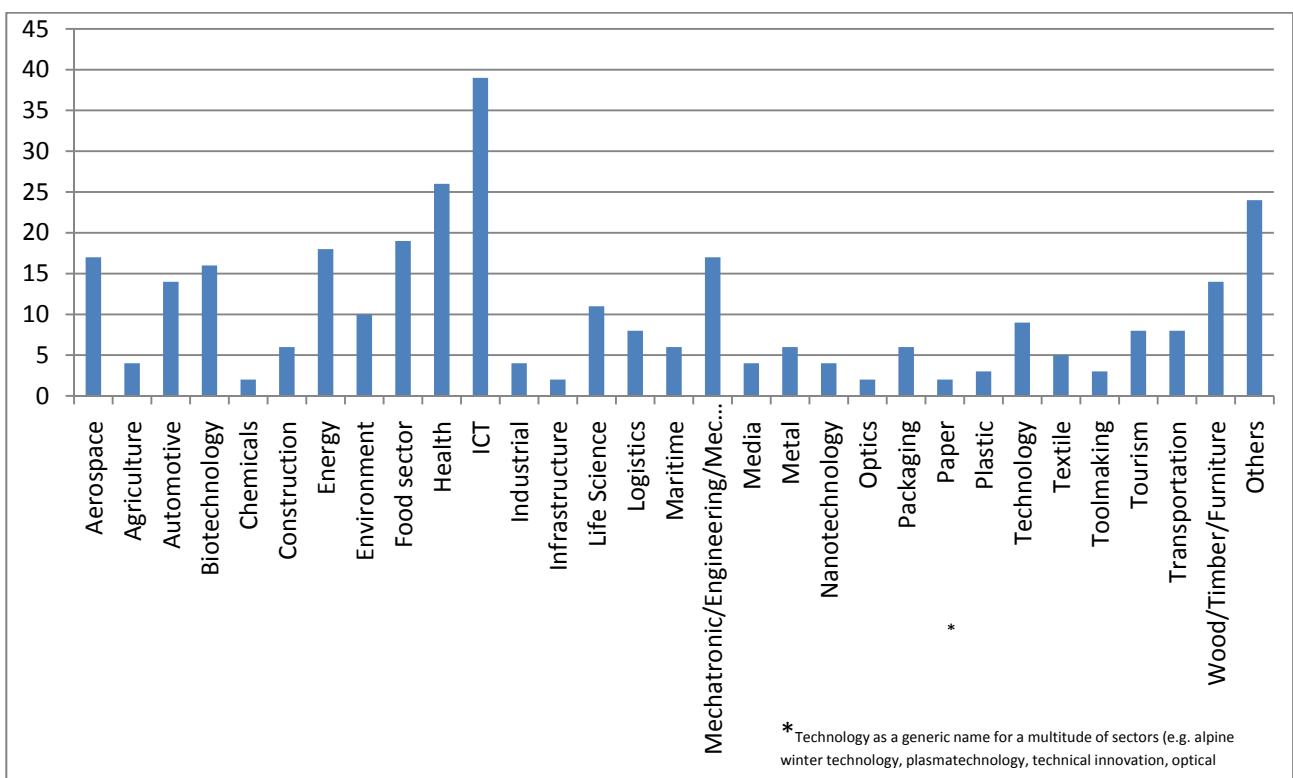


Talking about the structure of the respondents, the aim was to get the feedback exclusively from the cluster organizations. In case the questionnaire reached cluster policy makers or cluster stakeholders (administrators/coordinators of cluster organizations), these were asked to answer from the perspective 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. These answers were a signal to the fact public authorities are interested in the future activities of the platform and should they want to get involved (register) in the Collaboration Platform, we have to give them the physical possibility to do so – with a short profile and without complete access to all the information.



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 the flexibility to 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 probability is also rather low that a cluster organization would register for the education sector, which is statistically identified as such.

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/met 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 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 positive response of 87%. However, we have to handle this information with care – the situation in reality might be very time consuming in making sure that the cluster organizations provide indeed the quantity and the quality of information as in the survey.

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

As mentioned in the introductory part, in order to find out how the involvement of the cluster members could be activated, 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**. Giving them the possibility to take over an active role as future users and user-developers in the platform created a psychological positive effect that is - logically – followed by expectations from the real platform. 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.

## Cluster Organisations User Survey

### Expectations from a future on-line collaboration platform

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.

In order to develop a user-oriented collaboration platform and a European Club of Cluster Managers based on your real needs and interests, we kindly ask you to give us your feedback on your expectations by filling in this questionnaire.

#### 1 Your background

**Name of the organisation  
(in English), website**

**Name and email address of  
the author filling in the  
information**

**Sector**

**Country**

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% <input type="checkbox"/> rather important 29% <input type="checkbox"/> less important 8% <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% <input type="checkbox"/> rather important 35% <input type="checkbox"/> less important 9% <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% <input type="checkbox"/> rather important 41% <input type="checkbox"/> less important 7% <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% <input type="checkbox"/> rather important 44% <input type="checkbox"/> less important 14% <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% <input type="checkbox"/> rather important 40% <input type="checkbox"/> less important 13% <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% <input type="checkbox"/> rather important 38% <input type="checkbox"/> less important 14% <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% <input type="checkbox"/> rather important 38% <input type="checkbox"/> less important 7% <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% <input type="checkbox"/> rather important 47% <input type="checkbox"/> less important 16% <input type="checkbox"/> not important at all 1%
2.9. <i>Other (please describe):</i>	<input type="checkbox"/> very important <input type="checkbox"/> rather important <input type="checkbox"/> less important <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?

3.1. **Advanced search** function for cluster organisations (“who can do what”, competences, regions, industry keywords, etc.)

<input type="checkbox"/> very important	60%
<input type="checkbox"/> rather important	31%
<input type="checkbox"/> less important	8%
<input type="checkbox"/> not important at all	1%

3.2. **Event** calendar, where you can post your own events and presentations and see what others are doing

<input type="checkbox"/> very important	30 %
<input type="checkbox"/> rather important	47%
<input type="checkbox"/> less important	21%
<input type="checkbox"/> not important at all	2%

3.3. **Discussion** fora and thematic discussions/community building for industry issues, best practices, etc.

<input type="checkbox"/> very important	25%
<input type="checkbox"/> rather important	46%
<input type="checkbox"/> less important	27%
<input type="checkbox"/> not important at all	2%

3.4. **(EU) project marketplace** for finding information and partners for (EU) projects

<input type="checkbox"/> very important	52%
<input type="checkbox"/> rather important	33%
<input type="checkbox"/> less important	13%
<input type="checkbox"/> not important at all	2%

3.5. Cluster organisation **benchmarking**, to compare your organisation to others

<input type="checkbox"/> very important	33%
<input type="checkbox"/> rather important	41%
<input type="checkbox"/> less important	23%
<input type="checkbox"/> not important at all	3%

3.6. **Communication** tools directly available on the platform (internal email services, Skype, video conference, etc.)

<input type="checkbox"/> very important	20%
<input type="checkbox"/> rather important	32%
<input type="checkbox"/> less important	40%
<input type="checkbox"/> not important at all	8%

3.7. **News sharing** through blogs, newsroom, RSS feed, etc

<input type="checkbox"/> very important	16%
<input type="checkbox"/> rather important	42%
<input type="checkbox"/> less important	38%
<input type="checkbox"/> not important at all	4%

3.8. **Project** and document administration system; presentation sharing, video clips

<input type="checkbox"/> very important	16%
<input type="checkbox"/> rather important	39%
<input type="checkbox"/> less important	38%
<input type="checkbox"/> not important at all	7%

3.9. **Cluster WIKI**, 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%
<input type="checkbox"/> rather important	43%
<input type="checkbox"/> less important	29%
<input type="checkbox"/> not important at all	5%

3.10. **Library** on sectoral studies/documents/information

<input type="checkbox"/> very important	40%
<input type="checkbox"/> rather important	39%
<input type="checkbox"/> less important	19%
<input type="checkbox"/> not important at all	2%

3.11. *Other (please describe):*

<input type="checkbox"/> very important	
<input type="checkbox"/> rather important	
<input type="checkbox"/> less important	
<input type="checkbox"/> not important at all	

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%

### 4.7. Mission statement

*(reason for the foundation of the cluster organisation, history of the organisation)*

Would you provide it?  
 yes 94%  
 no 6%

Would it be useful for you?  
 very useful 25%  
 rather useful 40%  
 less useful 30%  
 not useful 5%

#### 4.8. Interest areas of the cluster organisation:

*Technology/sectoral information, markets, R&D projects, IPR issues, cl. management methodologies, financing, trends, marketing, events, etc.*

Would you provide it?  
 yes 91%  
 no 9%

Would it be useful for you?  
 very useful 48%  
 rather useful 42%  
 less useful 9%  
 not useful 1%

#### 4.9. List of services/info offered to the collaboration platform by you

*Partnership for (EU) projects, events, trainings, news, best practices, studies, etc.*

*Others: please mention .....*

Would you provide it?  
 yes 93%  
 no 7%

Would it be useful for you?  
 very useful 47%  
 rather useful 43%  
 less useful 9%  
 not useful 1%

#### 4.10. List of services requested by you from the collaboration platform

*Partnership for (EU) projects, best practices, benchmarking, studies, club services, etc.*

*Others: please mention.....*

Would you provide it?  
 yes 92%  
 no 8%

Would it be useful for you?  
 very useful 48%  
 rather useful 40%  
 less useful 10%  
 not useful 2%

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
- Others, please name: .....

#### 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%

**WE THANK YOU FOR THE TIME YOU TOOK TO GIVE US YOUR FEEDBACK AND SHOULD YOU SEE IT AS AN INVESTMENT, WE WILL DO OUR BEST TO PROVIDE YOU A GOOD RETURN ON IT!**

Should you have any further question, please contact:

[Lucia.Seel@clusterland.at](mailto:Lucia.Seel@clusterland.at)

You can return your feedback either to the email address above or by fax at the number

**+43 732 79810-5110**