

# CMQ – CLUSTER MANAGER QUALIFICATION

Results of a comprehensive survey  
on tasks, skills & training needs of European cluster managers



## PREFACE

This document summarizes the results of a comprehensive survey at European scale among cluster managers and cluster stakeholders. Both target groups were asked to answer questions on tasks, skills and training needs of cluster managers. The survey was carried out in the framework of the INNO-Net project CEE-ClusterNetwork, a network of Central and Eastern European innovation agencies and cluster stakeholders under the umbrella of the Pro INNO Europe initiative established by the European



Commission DG Enterprise and Industry.  
[www.proinno-europe.eu](http://www.proinno-europe.eu)



CEE-ClusterNetwork partner countries (regions):

- Austria (Lower Austria, Salzburg, Tyrol, Upper Austria)
- Croatia
- Czech Republic
- Hungary (West Pannon)
- Italy (South Tyrol)
- Slovakia
- Slovenia
- Poland

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## INTRODUCTION

Cluster organisations are considered as new and highly efficient forms of innovation support providers that provide and channel specialised and customised business support services to enterprises. High quality cluster management is important to ensure cluster excellence in Europe and efficient cluster organisations act as a driving force for clusters. Their performance is very much linked to the professional expertise and the capability of cluster managers, who dispose of good cluster insight necessary for an efficient support to cluster members.

As cluster management is a relatively new profession a clear common job profile has not yet been developed. Cluster managers are expected to be well grounded in the cluster's specific industry, to be business as well as technical experts. They need to have good skills in management, communication, IT and languages and to know the relevant policies and policy makers. Expected soft skills are diverse as well: leadership quality capability to find compromises, being a sales talent and accurate in reporting duties, etc. Of course cluster managers have to be flexible and to continuously adapt the existing services to the needs of the cluster – or develop new ones.

At a cross-border workshop on 26-27 September 2007 in Vienna, a high majority of 44 participating cluster managers coming from 11 CEE regions expressed a need for training, quality standards and benchmarking tools for cluster management. Consequently in the 'CEE Cluster Agreement on common strategies and objectives for the future innovation and cluster policy' all partner regions committed to support high quality training to cluster managers. The agreement was signed by the responsible policy makers in Brussels in November 2007.

In autumn 2008 the Lower Austrian Business Agency eco-plus conducted a large-scale survey on tasks, necessary skills and training needs of cluster managers on behalf of the CEE-ClusterNetwork. The goal was to reach a better understanding of cluster management challenges and to prepare the ground for future training programmes. About 1000 cluster organisations all over Europe were invited to answer an online questionnaire and to give feed-back to e.g. following questions:

- What tasks and skills do cluster managers themselves consider most important?
- Do cluster stakeholders (such as innovation agencies or ministries) have a different view on a cluster manager's tasks and necessary skills?
- To what extent are age, size, sector and location of clusters relevant to tasks and requested skills of cluster managers?
- Is there a need for development of new trainings at an international level?
- How much time and money is available and how are decisions on trainings generally taken?

This document summarizes the main results based on answers of 107 cluster managers and 52 cluster stakeholders in Europe. Results were discussed and interpreted by CEE-ClusterNetwork partners and experts of the Austrian Institute for SME Research and Danube University Krems at a workshop on the 5<sup>th</sup> of February 2009 in Prague.

## SUMMARY

The survey results have shown that cluster managers across Europe have a multifaceted range of tasks in their job profiles. It is very much centred, however, around working with and serving their 'cluster members', i.e. the companies, research facilities and other institutions actually forming the cluster. Consequently, networking-type of job activities are clearly dominating the portfolio of tasks: **four out of the five top-ranked duties in terms of importance are concerned with establishing or developing contacts**, including issues like integrating of and fostering exchange between cluster members, lobbying activities with stakeholders or organising events. **Initiating and bringing forward various kinds of co-operation projects**, within and outreaching the cluster, constitute another major area of responsibilities.

This field of action directly translates into the skills and competences required of cluster managers. Among the **three most important skills**, two can be regarded as 'soft skills': **communicative skills** and **leadership capacity**, which are seen as highly important by 75 % of cluster managers and an almost similar share of super-ordinate bodies (cluster stakeholders). Also among the top-three skill requirements is the **'knowledge of the cluster's specific industry'**. This is pointing at the fact that a cluster manager needs to dispose of sufficient expertise related to the industry the cluster is focusing on. Furthermore, cluster managers should be capable of working with and applying certain management tools, in particular with reference to project management and innovation management. Finally, as cluster policies usually constitute elements of wider (public) policies, cluster managers should be well acquainted with such policies, especially with a view on innovation policy as well as on regional development policy. This also includes knowing the landscape of available support services and subsidies at regional, national and EU level.

The training needs and interests of cluster managers correspond to the skill requirements indicated above. Almost 60 % of the managers wish to have upgraded their soft skills and industry-specific knowledge. However, the topic of innovation appears to be especially high on the training agenda as well: More than half of the managers wish to receive training on **'innovation management tools'**, on **'knowledge management techniques'** as well as on **'innovation policies'**. Moreover, there is also a significant interest in training on 'international co-operation and networking' and on 'EU and international subsidies'. Interestingly, from the perspective of cluster stakeholders, there is a strong need to improve the 'business consultancy know-how' of cluster managers through further training in this area.

It is important to recognise, however, that the task profiles, skill requirements and training needs of cluster managers are certainly not uniform across all cluster organisations in Europe. The following factors play a role:

- **The age and stage of development of the cluster (organisation):**

The tasks of a manager of a young cluster organisation focus much more on developing the cluster's strategy and on integrating new cluster members. Conversely, for older cluster organisations, lobbying activities become relatively more important. The specific challenges of early stage clusters result in a higher importance of, amongst others, leadership skills, acquaintance with strategy development tools as well as knowledge about regional/national subsidies. This is then also reflected in different training needs.

- **The national policy frameworks:**

Overarching policy approaches and major support programmes in place can strongly influence the activities of an individual cluster and therefore the tasks of cluster managers. For example, stimulating innovation and R&D projects are particularly high on the cluster managers' agenda in Austria and France. Hence, knowledge on innovation policies and innovation management tools is also more often required of cluster managers in these countries.

- **Location of the cluster:**

Cluster managers in the new Member States and non-EU-countries seem to attach more importance to establishing co-operation with foreign clusters, to learning from clusters abroad and about international co-operation in general than cluster managers from the former EU-15 do.

There is obviously a high demand for further training among European cluster managers. While a significant part of the training needs might be best addressed by measures at the regional or national level, there is also **scope for educational offerings at an international or cross-border level.**

- Around 60 % of the surveyed cluster managers are currently concerned with important international matters in the context of their work, e.g. international co-operation projects of their cluster members or co-operation with cluster organisations abroad.
- About 55 % of the cluster managers have explicitly expressed a substantial interest in international training environments in general, whereas less than 40 % are more reluctant regarding international settings.
- There is some evidence that cluster managers from smaller countries as well as those from the new Member States and non-EU-countries may be more inclined towards international education measures than their colleagues from larger EU-15 countries.

Anyway, the desire for international training of course depends on the subject. **The most requested issues for international trainings are:**

- Issues which are international 'by nature':  
EU cluster policies; EU subsidies and support programmes; know-how on international co-operation; knowing other cluster organisations abroad.

- Issues related to innovation:

In particular innovation policies; innovation management tools.

These subjects attract the interest of 40 % to more than 50 % of all cluster managers and they are also suggested by a similar share of cluster stakeholders.

In the context of any international training, **study visits** to other clusters should be an essential component as more than half of the cluster managers consider this to be important.

In terms of **time and money resources**, the survey results suggest that a cluster management training scheme should not require cluster managers to spend more time than one week per year. Furthermore, course fees up to € 3,000 seem to be affordable for a majority of respondents and therefore this amount represents a kind of ceiling.

## METHODOLOGY

The survey was targeted at persons involved in the management or involved in the overall co-ordination of cluster organisations.

Cluster organisations may be considered as the legal entity engineering, steering and managing the clusters, including usually the participation and access to the cluster's premises, facilities and activities. They are considered as new and highly efficient forms of innovation support providers that provide or channel specialised and customised business support services, especially to SMEs.

- **Cluster managers and their teams (CM):**

A cluster manager (also: cluster facilitator) is a person devoted to working at least part-time to manage the cluster. Project managers may support cluster managers and be responsible for specific projects of the cluster.

- **Cluster stakeholders (CS):**

Whereas cluster managers work 'in the field' with and for companies, cluster stakeholders are understood as super-ordinate body in the survey. CS develop, establish, finance and/or co-ordinate cluster organisations within a region or at a national level (e.g. regional development agencies, business agencies, innovation agencies, ministries, employer associations etc.). In many cases they are also involved in the selection of cluster managers and the decision on further education. It is important to note, that these organisations were not asked about their own tasks and skills, but about their point of view on important tasks and skills of cluster managers.

With the help of the open source survey tool LimeSurvey, an online questionnaire was created. Potential respondents were addressed via e-mail using a 'snowball methodology' involving European Cluster Alliance partners, Europa Intercluster and other networks of CEE-ClusterNetwork partners. An invitation to participate in the survey was also published on the websites of Europe INNOVA, PRO INNO Europe and TCI.

The online survey started on September 23<sup>rd</sup> 2008 and ended with a last entry into the database on December 3<sup>rd</sup> 2008. The response rate was 159 valid answers, about two thirds from cluster managers and their teams, one third from cluster stakeholders.

**Table 1 – Response rate of the survey**

Respondents	Frequency	Percent
Cluster Managers and their teams	107	67.3
Cluster Stakeholders	52	32.7
<b>Total</b>	<b>159</b>	<b>100.0</b>

Cluster managers from most of EU-27 countries plus Croatia, Bosnia and Herzegovina, Norway and Ukraine are represented in the survey. Also cluster managers from transnational clusters participated in the research. However, respondents from Central and Eastern European countries are dominating, resulting from the fact that the survey was carried out in the framework of CEE-ClusterNetwork and the strong commitment of the project partners. The respondents of cluster stakeholders are more evenly distributed over countries.

**Table 2 – Distribution of respondents by country**

Frequency	Cluster Managers
22	Austria
19	Germany
16	Croatia
14	France
4 to 5	Each: Hungary, Slovakia, Belgium, transnational clusters
1 to 3	Each: Bosnia and Herzegovina, Czech Republic, Italy, Latvia, Norway, Poland, Spain, Sweden, Ukraine, United Kingdom
Frequency	Cluster Stakeholders
4 to 6	Each: Austria, Czech Republic, France, Germany, Italy, United Kingdom, transnational organisations
1 to 3	Each: Croatia, Finland, Greece, Hungary, Lithuania, Norway, Poland, Slovakia, Slovenia, Spain

The size of the geographic sub-samples allows special analyses for the former EU-15 countries, for countries involved in CEE-ClusterNetwork and for Austria, Germany, France, and Croatia.

The clusters represented in the survey cover a very wide spectrum of different industries. Many of them are cross-sectoral involving more than one industry. Consequently, analyses by sector turned out to be difficult in terms of establishing a distinct classification and because of the small sub-samples. Sector-related data are therefore presented only in few examples.

## MAIN FINDINGS IN DETAIL

### 1. Profiles of cluster managers

This chapter summarizes the survey results regarding:

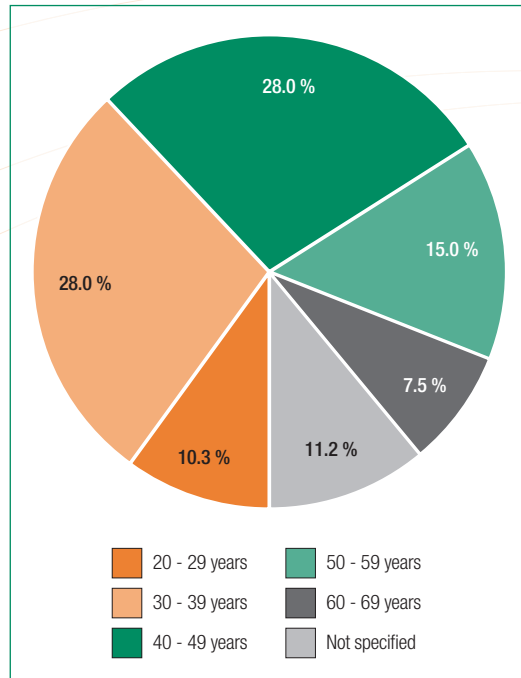
- demographic characteristics (age, education, main professional experience and sex)
- most important tasks and
- most important skills of cluster managers.

Even if there is no common job profile for cluster managers in Europe, it is interesting to see overall similarities as a common denominator, but also the differences. The results show how age, size and location of clusters influence the cluster managers' tasks and skills.

#### 1.1. Age, education, professional experience and sex of cluster managers

The majority (56.0 %) of the surveyed cluster managers are 30 to 49 years old. A proportion of 10.3 % of the cluster managers are even younger (20 to 29 years old), 7.5 % of the respondents are above 60.

Graph 1 – Age of cluster managers (N=107)



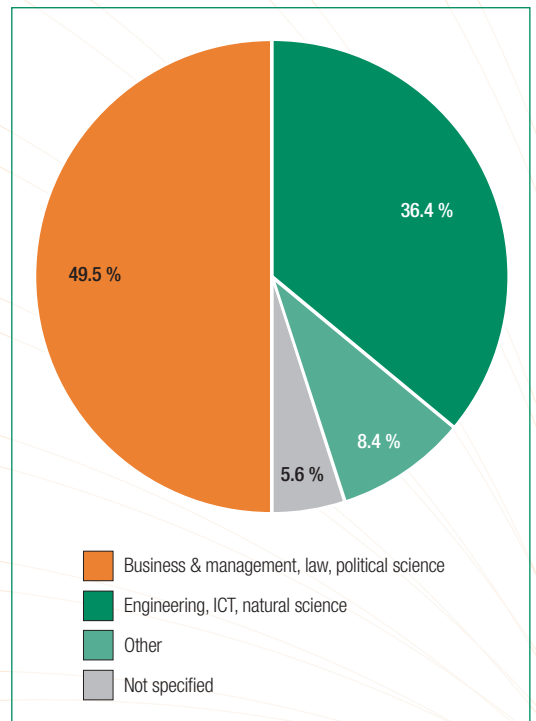
Cluster managers have various educational backgrounds, being it secondary or tertiary level. Two major groups can be identified:

On the one hand, there is a 'social sciences group' including education in business & management, law and political sci-

ence. 49.5 % of the cluster managers stated to have such an educational background.

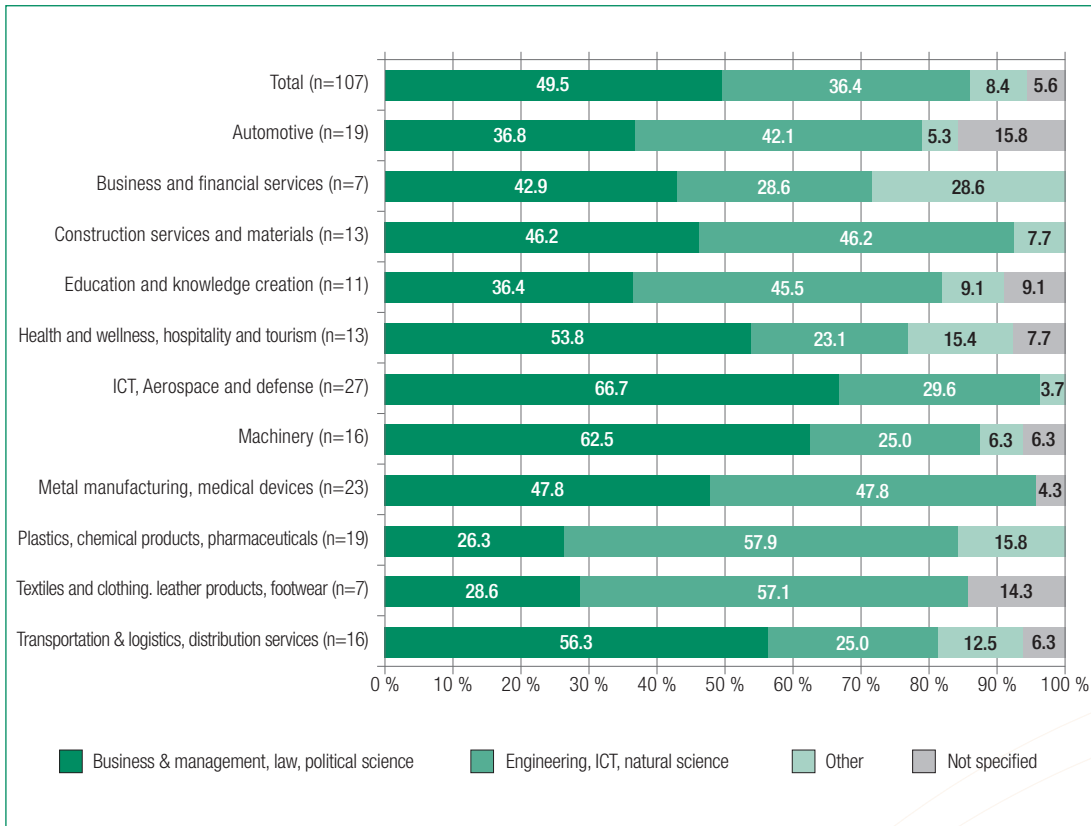
On the other hand, there is a 'natural science and engineer group' which comprises education in engineering, ICT and natural sciences, 36.4 % of the CM respondents belong to this group.

Graph 2 – Education of cluster managers (N=107)



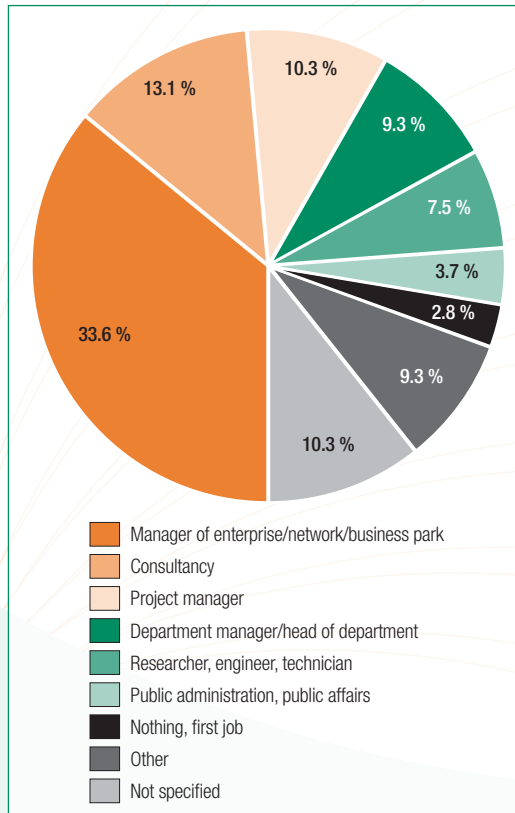
When examining the educational background of cluster managers by the clusters' economic sector, there tend to be some major differences: In the fields of ICT, aerospace and defence, and machinery there are remarkably more cluster managers with a social science background (66.7 % and 62.5 %). By contrast, especially in the fields of plastics, chemical products and pharmaceuticals as well as textiles and clothing, leather products and footwear there are clearly more cluster managers with a natural science or engineering background (57.9 % and 57.1 %).

Graph 3 – Education of cluster managers (by sector of cluster)

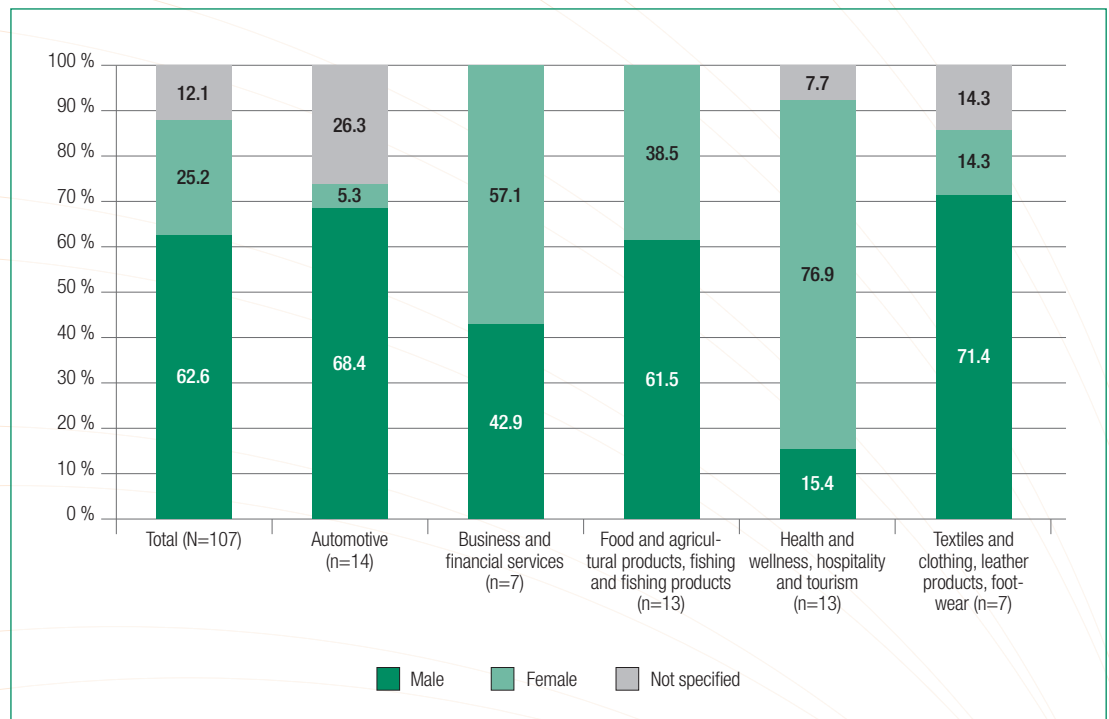


Before working in cluster management, the big majority of CM respondents gained its main professional experience in the private sector. Only 3.7% of respondents worked in the public administration. 7.5% have a R&D background as researchers or engineers in universities or companies. Almost half of the CM respondents worked in an executive position (33.6% top management, 9.3% middle management).

Graph 4 – Main professional experience of cluster managers (N=107)



Graph 5 – Sex of cluster managers (by sector of cluster)



Nearly two thirds of the CM respondents are male, only one fourth female (note that some 12 % refused answering this question). This proportion varies depending on the sector the cluster belongs to. The sectors textiles and clothing, leather products, footwear and automotive are dominated by male cluster managers (71.4 % and 68.4 %). By contrast, the proportion of female cluster managers is especially high in the sectors health and wellness, hospitality and tourism (76.9 %). Also, in the sector business and financial services, more than half of the CM respondents are female (57.1 %).

### 1.2 Importance of specific tasks and duties of cluster managers

Cluster management usually comprises various tasks and duties including e.g. strategic tasks, cluster-internal exchange, internationalisation activities, PR & marketing, training and advice, as well as securing financing.

The survey aimed at clarifying how age, size, sector and location of clusters influence a cluster manager’s duties. These task profiles of cluster managers are also important to understand the training needs. Both groups of respondents, cluster managers (CM) and cluster stakeholders (CS), were therefore asked to answer questions

regarding the importance of specific tasks and duties of cluster managers.

**Question:**

CM: How important are the following tasks and duties in your current position?

CS: How important are the following tasks for the work of your cluster managers and their teams?

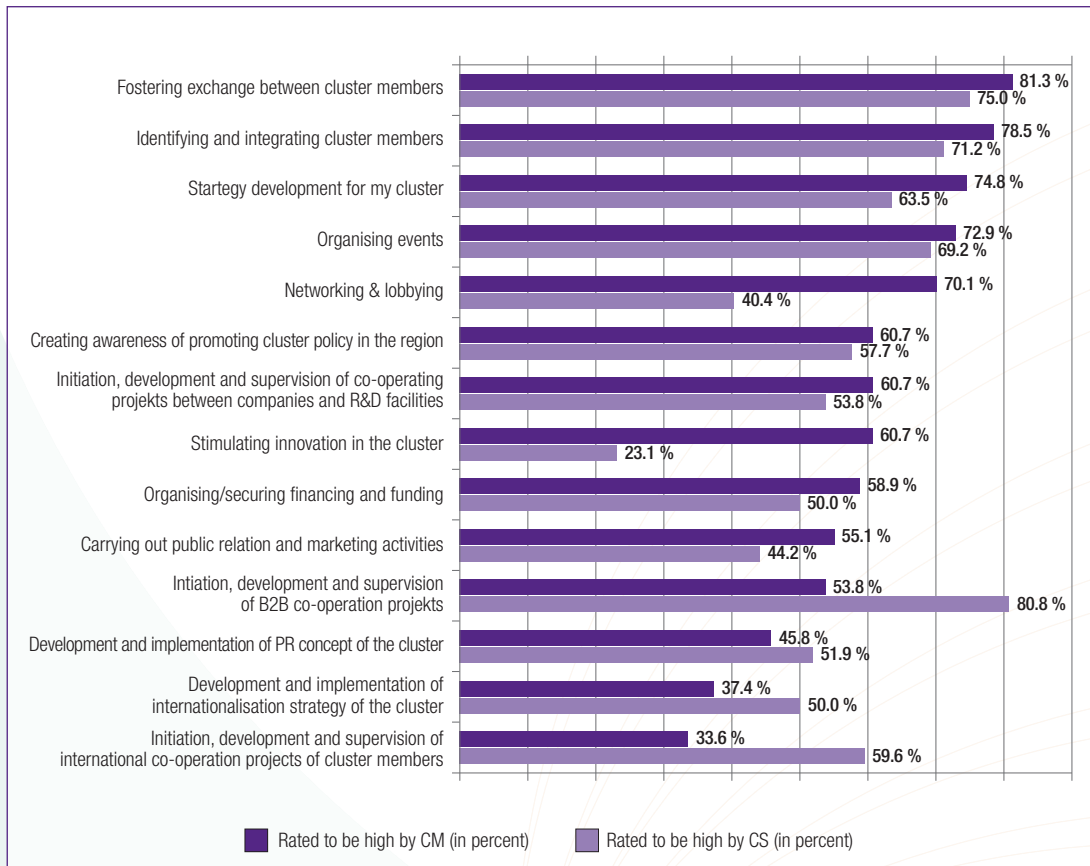
In general, the main tasks of cluster managers are to establish trust among and to foster exchange between cluster members (i.e. companies, R&D facilities etc.). From the cluster managers’ point of view, the five top ranked tasks and duties include:

- ‘Fostering exchange between cluster members’ (networking, socialising, trust building),
- ‘Identifying and integrating cluster members’,
- ‘Strategy development for the cluster’,
- ‘Organising events’ (e.g. seminars, conferences, study trips, info exchange, trade fairs), and
- ‘Networking with stakeholders, lobbying’.

When looking especially at the cluster stakeholders’ point of view, very similar tasks and duties are rated to be of high importance. However, opinions of CM respondents and CS respondents differ concerning following tasks:

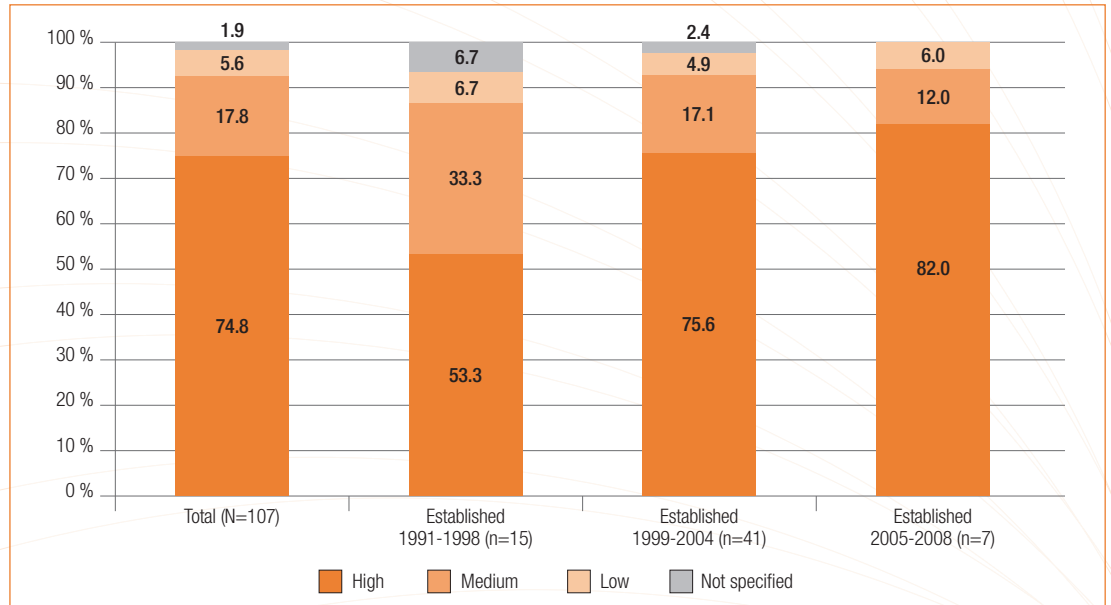
- The most important task for CS respondents is 'initiation, development and supervision of B2B co-operation projects' which is ranked high in importance by 80.8 %. Only 53.8 % of the cluster managers themselves stated this task to be of high importance.
- 'Networking and lobbying' is rated to be high of importance by 70.1 % of the cluster managers, but only by 40.4 % of the cluster stakeholders.
- While 60.7 % of the cluster managers attach high importance to the task 'stimulating innovation in the cluster', this is the case only for 23.1 % of the cluster stakeholders.
- Finally, there is also a remarkable difference between the view of cluster managers and cluster stakeholders concerning internationalisation activities: 'Initiation, development and supervision of international co-operation projects of cluster members' as well as the 'development and implementation of an internationalisation strategy of the cluster' is considered distinctly more important by the stakeholder level than by cluster managers themselves.

**Graph 6 – Importance of tasks and duties in the current position/for the work of cluster managers**

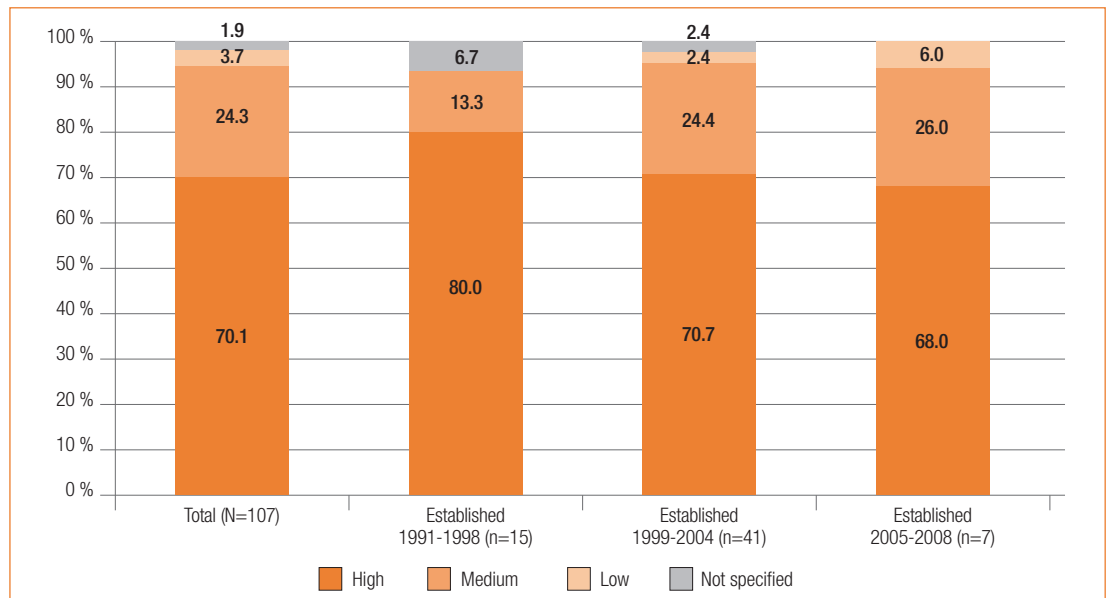


The importance of some tasks notably corresponds to the age of cluster organisations. To give an example, 'identifying and integrating cluster members' as well as the 'development of the cluster's strategy' is significantly more important for cluster managers in 'young' cluster organisations, whereas the importance of 'networking and lobbying' rather increases over time.

**Graph 7 – Importance of developing the cluster's strategy (by age of cluster organisation)**



**Graph 8 – Networking & lobbying (by age of cluster organisation)**

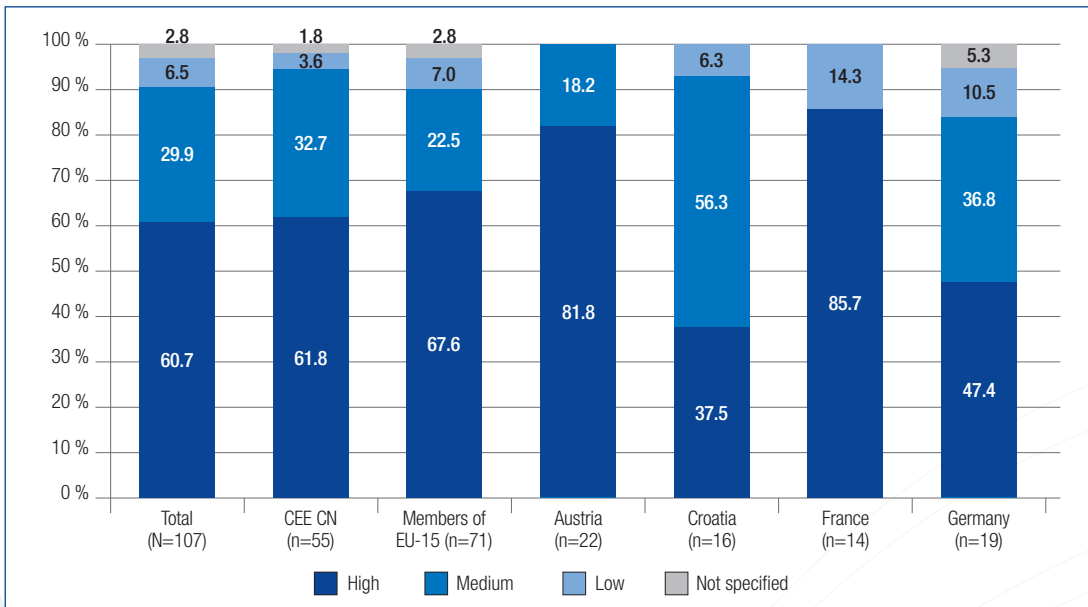


Comparing importance of tasks by location of the cluster shows clear variations at country level related to innovation issues. Thus, the task 'stimulating innovation in the cluster' is rated to be high in importance by 85.7 % of the French cluster managers, followed by 81.8 % of the Austrian cluster managers. By contrast, only 47.4 % of the German and 37.5 % of the Croatian cluster managers stated that this task would be

of high importance for their work. A very similar country-specific result can be observed when looking at a related task, i.e. 'initiation, development, supervision of co-operation projects of companies and R&D facilities'.

These results are in line with the fact that there are significant national/regional programmes in place in France and Austria, which provide financial support to SMEs for R&D co-operation activities.

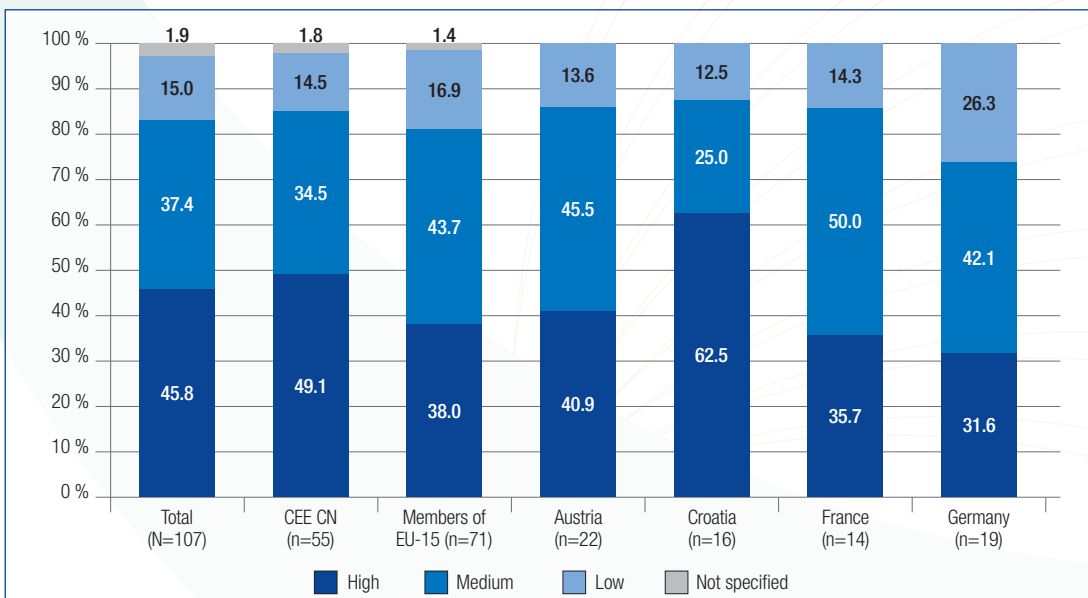
**Graph 9 – Importance of stimulating innovation in the cluster (by country)**



Variations between EU-15 countries on one hand and EU-12 countries as well as accession country Croatia on the other hand can be observed regarding internationalisation

activities. Whereas co-operation with other European clusters is of high importance for 62.5 % of respondents in Croatia, it is already ranked lower in CEE countries. Only 38 % of cluster managers in the old EU-15 countries considered these activities very important.

**Graph 10 – International co-operation with other clusters in Europe (by country)**



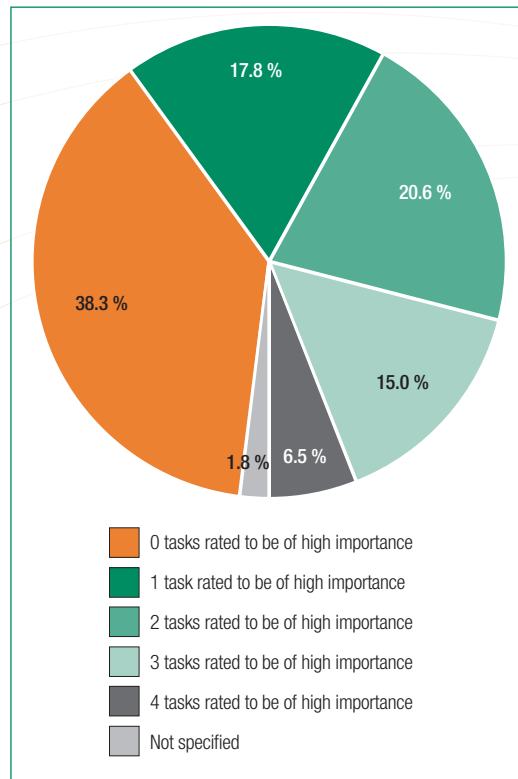
### 1.3 Importance of tasks and duties regarding internationalisation issues

A special focus of the survey was given to internationalisation issues:

- Development and implementation of internationalisation strategy of the cluster
- Initiation, development and supervision of international co-operation projects of cluster members
- International co-operation with other clusters in Europe
- International co-operation with other clusters overseas

Nearly one fifth of the cluster managers (17.8 %) stated that one of these four internationalisation tasks would be of high importance for their work. A slightly higher proportion (20.6 %) of cluster managers said that two of these four internationalisation tasks are of high importance. 15 % rated three tasks to be of high importance while 6.5 % rated all four tasks to be very significant for their work.

**Graph 11 – Number of internationalisation-related tasks which are of high importance in the CM’s current position**

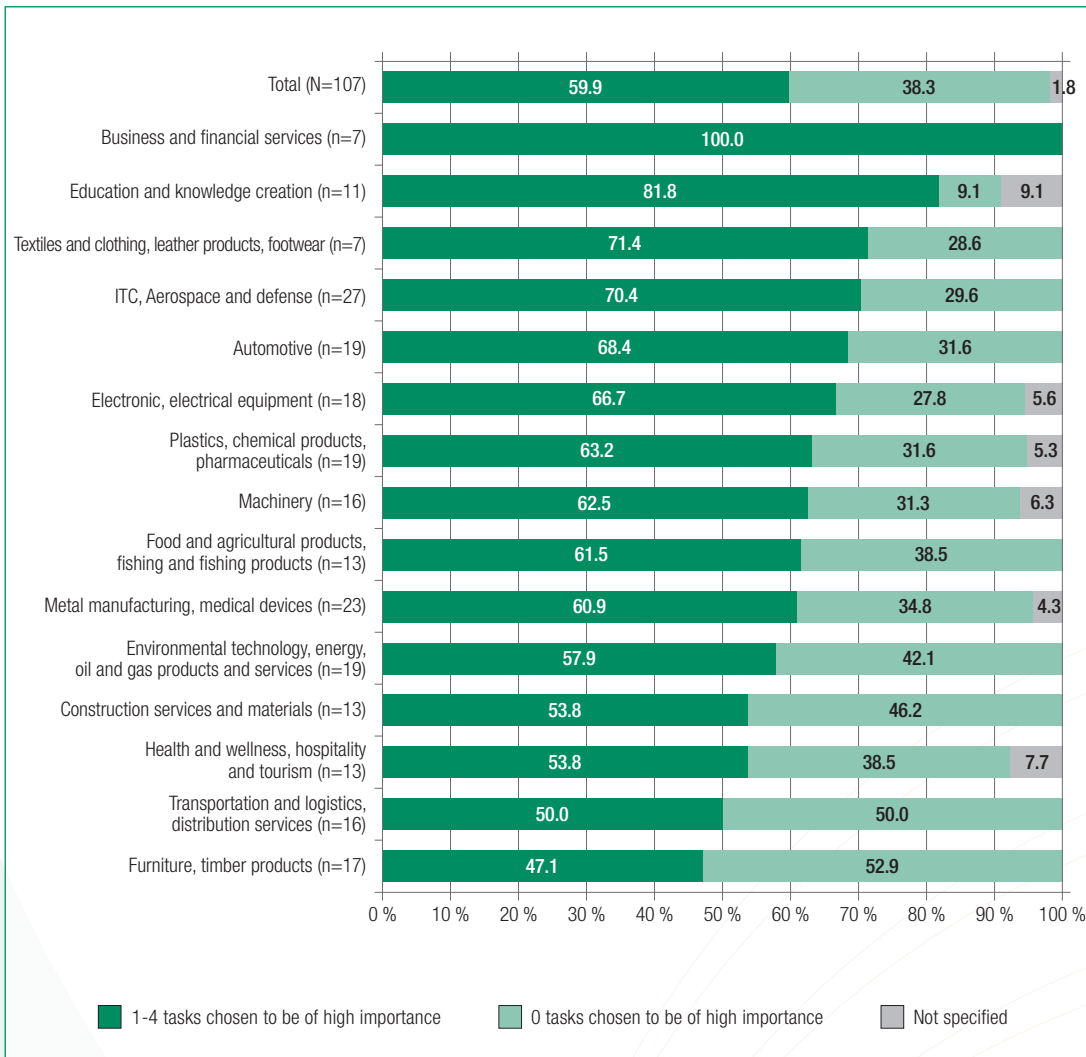


In total, 59.9 % of the cluster managers think that at least one of these four tasks is highly important in the context of their work. By contrast, more than one third (38.3 %) did not rate any of the four internationalisation tasks to be high of importance.

As already mentioned, internationalisation activities tend to be more important in new Member States and accession country Croatia. While 59.9 % of respondents in total rated at least one of the activities to be high important, it was 56.3 % in EU-15 but 62.5 % in Croatia. Comparing the answers by size of the cluster shows a higher ranking of internationalisation activities for smaller clusters (<25 members: 65.6 %, 25-74 members: 60 %, >75 members: 55.6 %).

Whether internationalisation issues form an important part of a cluster manager’s work also depends on the economic sector of the cluster (see Graph 12). All cluster managers in the sector ‘business and financial services’ rate at least one out of four internationalisation tasks to be of high importance. This is followed by the sector ‘education and knowledge creation’, where 81.8 % of the cluster managers state that one or more internationalisation-related tasks are of high importance. Furthermore, also in the sectors ‘textiles and clothing, leather products, footwear’ (71.4 %), ‘ICT, aerospace and defence’ (70.4 %) and ‘automotive’ (68.4 %), the proportion of cluster managers with important internationalisation tasks is higher than for the overall total (59.9 %).

**Graph 12 – Number of internationalisation-related tasks which are of high importance in the CM's current position (by sector of cluster)**



### 1.4 Importance of skills and areas of competence for the work of cluster managers

The variety of tasks of cluster managers certainly requires a range of different skills and competences to successfully fulfil the job. For this reason, both cluster managers and cluster stakeholders were asked about which skills and competencies are most relevant and important for their work.

**Question:**

CM: How important are the following skills and areas of competence for your work?

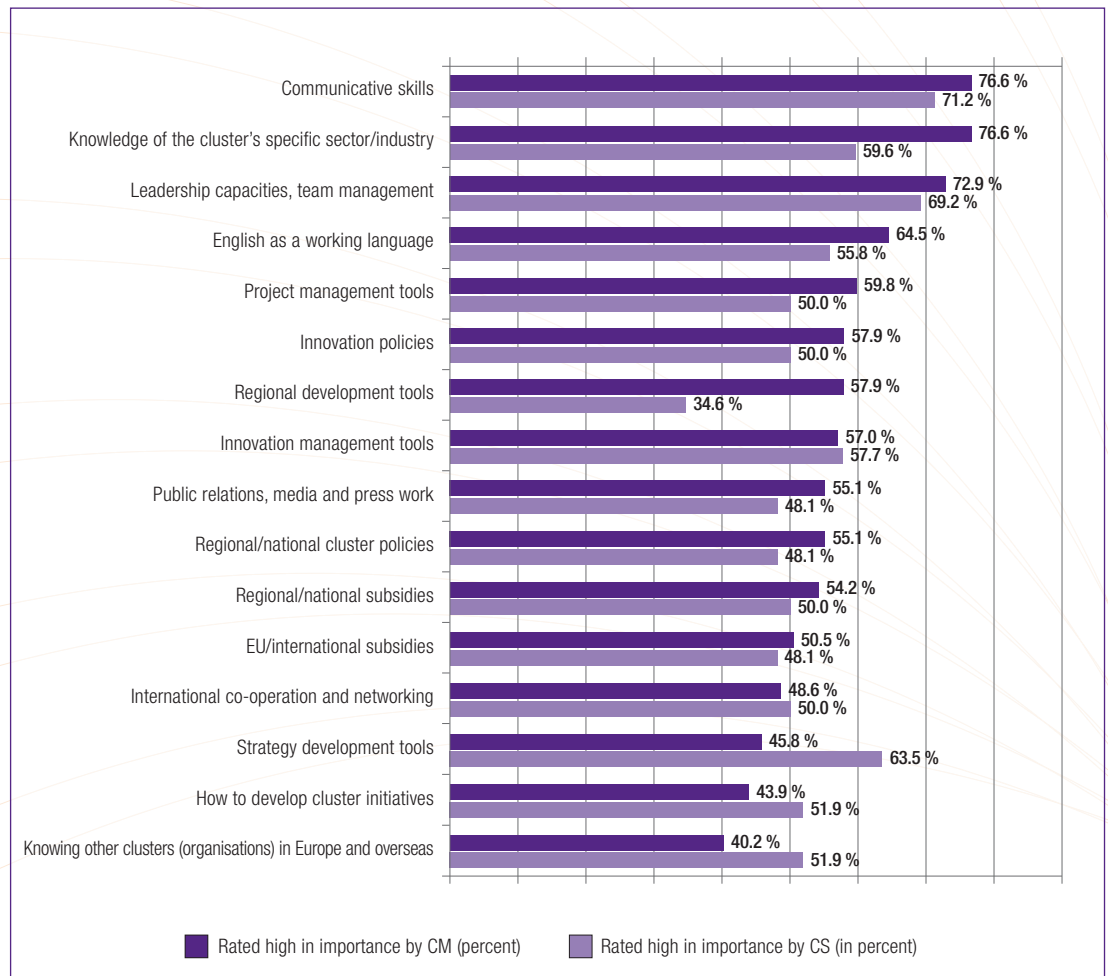
CS: How important are the following skills and areas of competence for the work of your cluster managers and their teams?

Generally speaking, soft skills and knowledge of the cluster's specific industry constitute the most important skills and areas of competence. Two of the three top-ranked skills important for the work of cluster managers are soft skills.

Both CM respondents and CS respondents agree that 'communicative skills' (presentation and negotiation techniques, steering team meetings, mediation) are the most important skills for the work as a cluster manager (see Graph 13). From the CM respondents' point of view, also the 'knowledge of the cluster's specific sector/industry' (76.6 %) as well as 'leadership capacities, team management' (72.9 %) are of high importance, followed by 'English as a working language' (64.5 %) and 'project management tools' (59.8 %).

Besides the soft skills mentioned above, cluster stakeholders consider 'strategy development tools' (63.5 %) very important. By contrast, only 45.8 % of the CM respondents share this opinion.

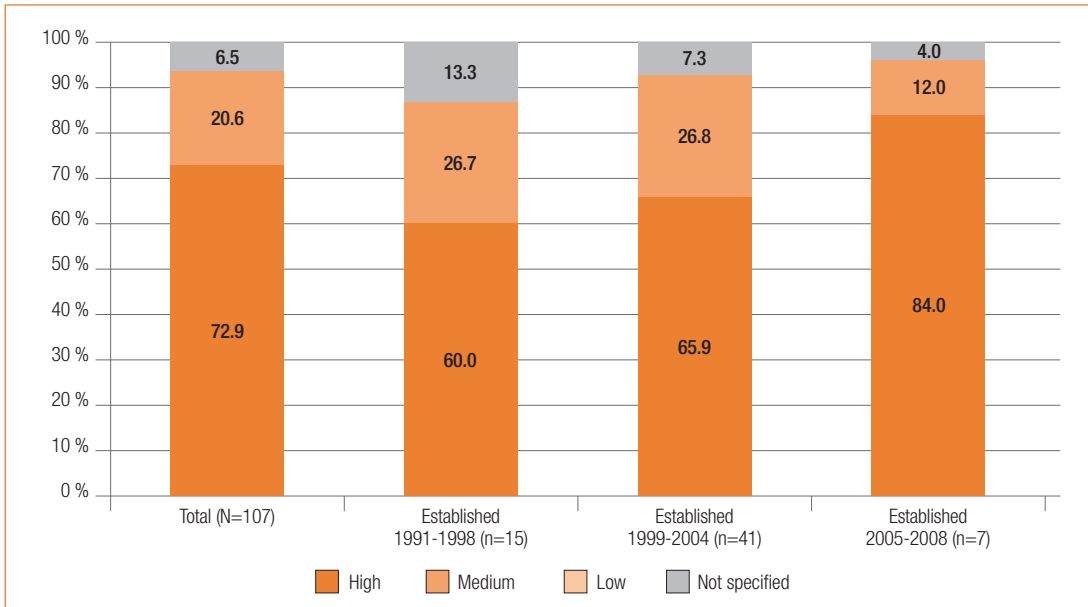
**Graph 13 – Skills and areas of competence important for the work of cluster managers (and their teams)**



Differences regarding the importance of skills and areas of competence can be identified when looking at the stage of clusters. 'Leadership capacities, team management', 'project management tools', 'regional/national subsidies' and 'strategy development tools' are generally more important in younger cluster organisations.

E.g. 'leadership capacities and team management', is considered very important by 84.0 % of the cluster managers working in young cluster organisations, while this proportion is clearly smaller in cluster organisations established before 2005 (see Graph 14). It is obvious that especially young cluster organisations have to develop team structures first.

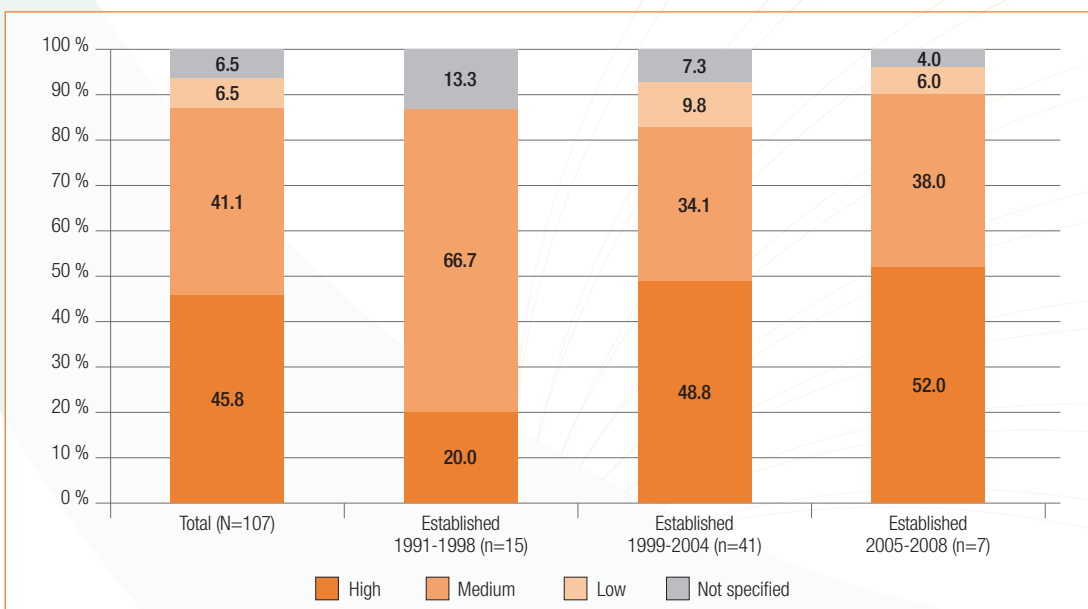
**Graph 14 – Leadership capacities, team management (importance by age of cluster organisation)**



Analysing the importance of ‘project management tools’ shows a similar picture. While only one third of respondents from cluster organisations established before 1998 consider these skills very important, it is two thirds of younger ones.

Also knowledge in the area of ‘regional/national subsidies’ seems to be more important for clusters organisations established after 2005 (64.0 %). Only less than half of the cluster managers in older cluster organisations share this opinion.

**Graph 15 – Knowledge on strategy development tools (importance by age of cluster organisation)**



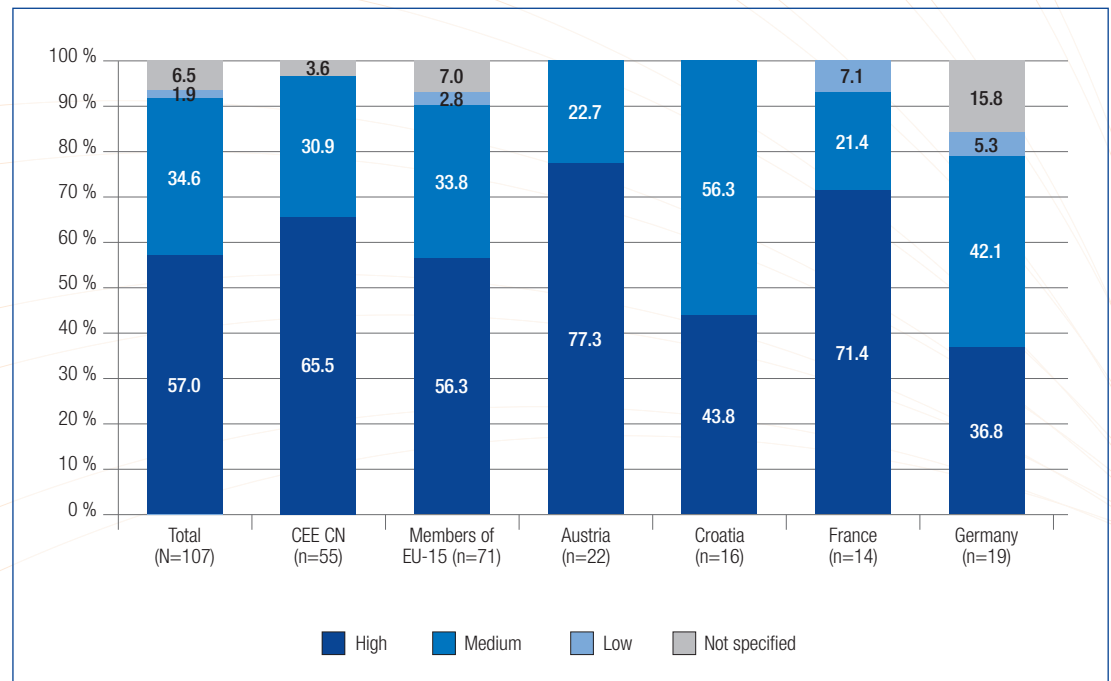
The factor age also becomes relevant when analysing the importance of ‘strategy development tools’ (e.g. SWOT analysis): While nearly one half of the respondents working in clusters organisations established after 1998 rate this skill to be of high importance, it is only one fifth of the cluster managers in older ones.

The importance of skills and areas of competence of cluster managers also differs by country. Again, in Austria and France skills related to innovation are rated to be of high importance more often than in other countries. This is especially the case for knowing 'innovation policies' and 'innovation management tools' (see Graph 16) where these two countries stand out. About 75 % of cluster managers in France and Austria consider such skills very important while the respective proportion in Croatia or Germany is below 60 %.

For Croatian cluster managers, 'knowing other clusters (organisations) in Europe and overseas' is of very high relevance (81.3 %). In Austria, France and Germany this is the case only for around 35 % of the CM respondents. In general, cluster managers in the new Member States (EU-12) do express a stronger wish to know about and cooperate with foreign clusters than their colleagues from EU-15 countries do.

Cluster managers in smaller clusters (0-24 members) attach more importance to skills and competences like 'business plans and financial planning', 'quality management tools' and 'how to develop cluster initiatives' as compared to CMs in larger clusters.

**Graph 16 – Innovation management tools (importance by country of cluster)**



## 2 Training needs and interests

### 2.1 General results

Based on the same skills and competences important for the work of cluster managers (see preceding chapter), both respondent groups were asked about the need for further training. In general, for those skills which were rated to be of high importance in the work context there is also a strong interest in further training.

**Question:**

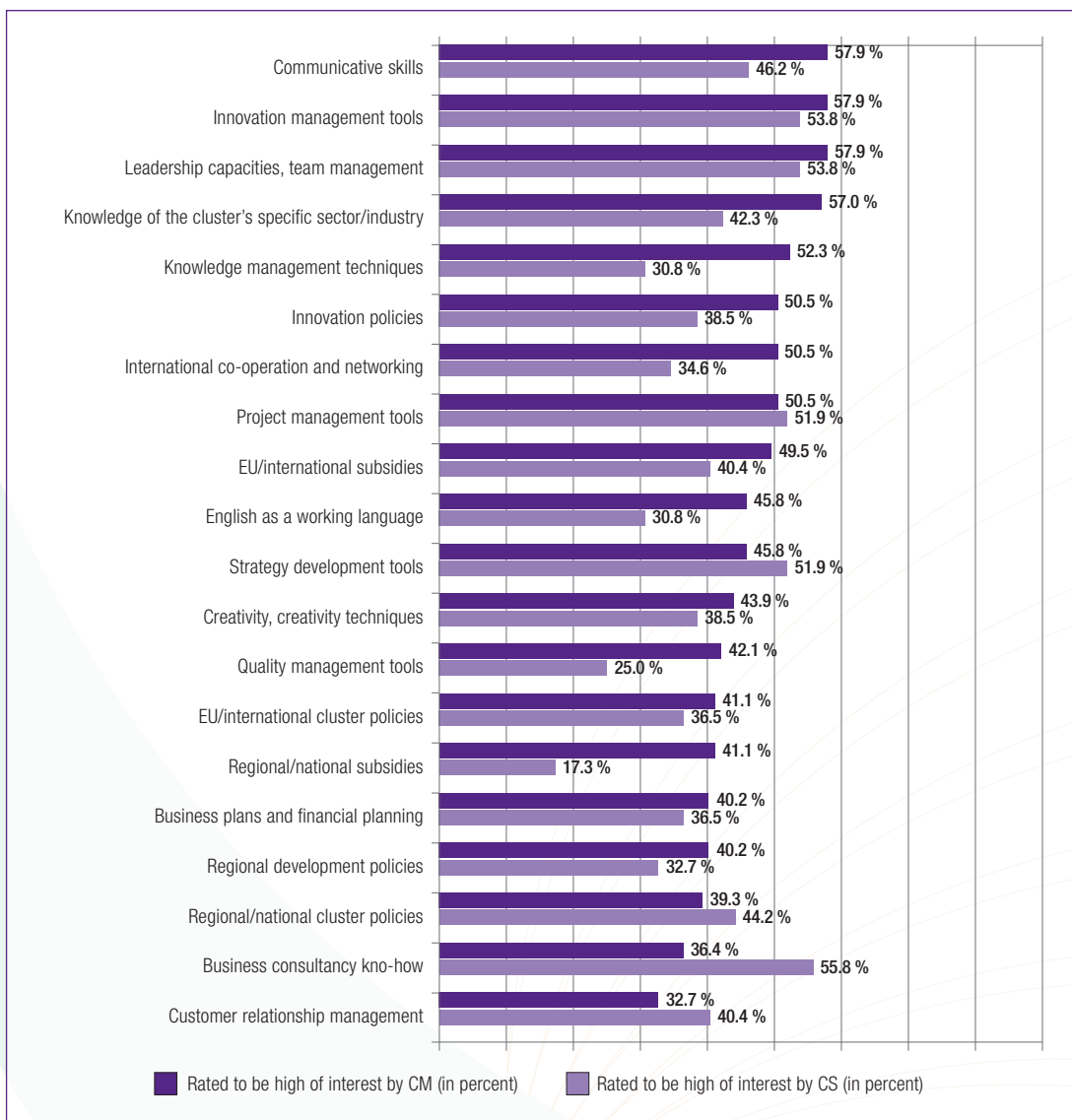
CM: With reference to the skills important for your work: Are you interested in (further) training of these skills? If so, are you interested in training in an international context with colleagues and peers from other countries?  
 CS: With reference to the skills important for the work of your cluster managers: Do you think there is a need to (further) train these skills? If so, should that training be in an international context with colleagues and peers from other countries?

As can be seen from Graph 17, cluster managers and cluster stakeholders agree on training needs in the fields of 'innovation management tools', 'project management tools' and 'leadership capacities, team management'.

On the other hand there are some remarkable differences: cluster managers show a particular training interest regarding 'communicative skills' (57.9 %), 'knowledge of the cluster's specific sector/industry' (57.0 %), 'knowledge management techniques' (52.3 %)

By contrast, cluster stakeholders see a higher need in skills development for cluster managers in 'business consultancy know-how' (55.8 %) and 'strategy development tools' (51.9 %). They also do not consider English language skills (30.8 %) as relevant for further trainings as cluster managers themselves (45.8 %).

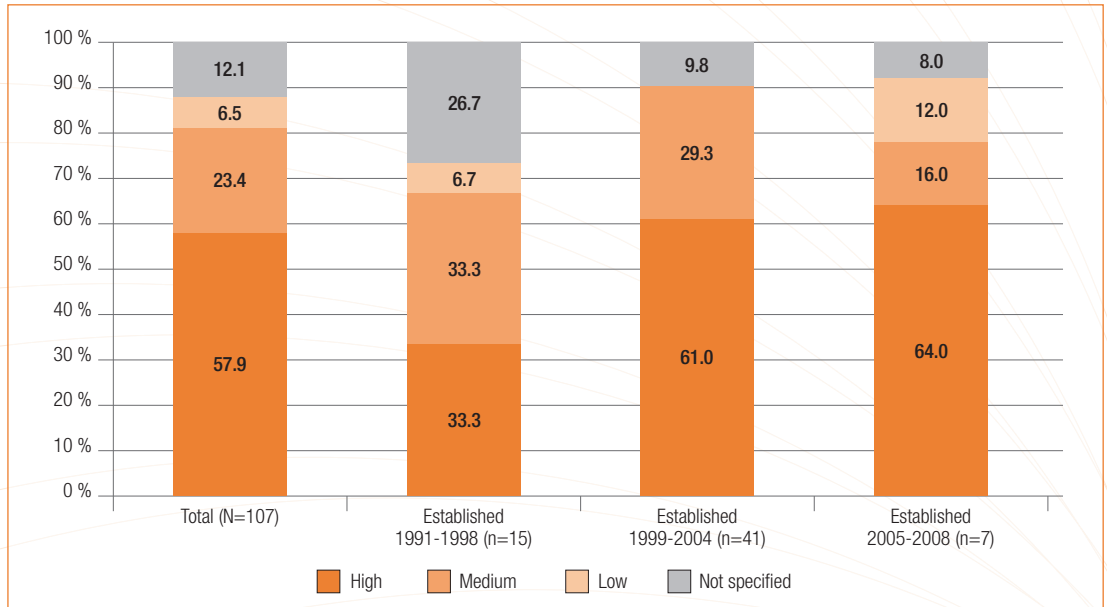
**Graph 17 – Skills and areas of competence where CM have interest in / where CS see need for training**



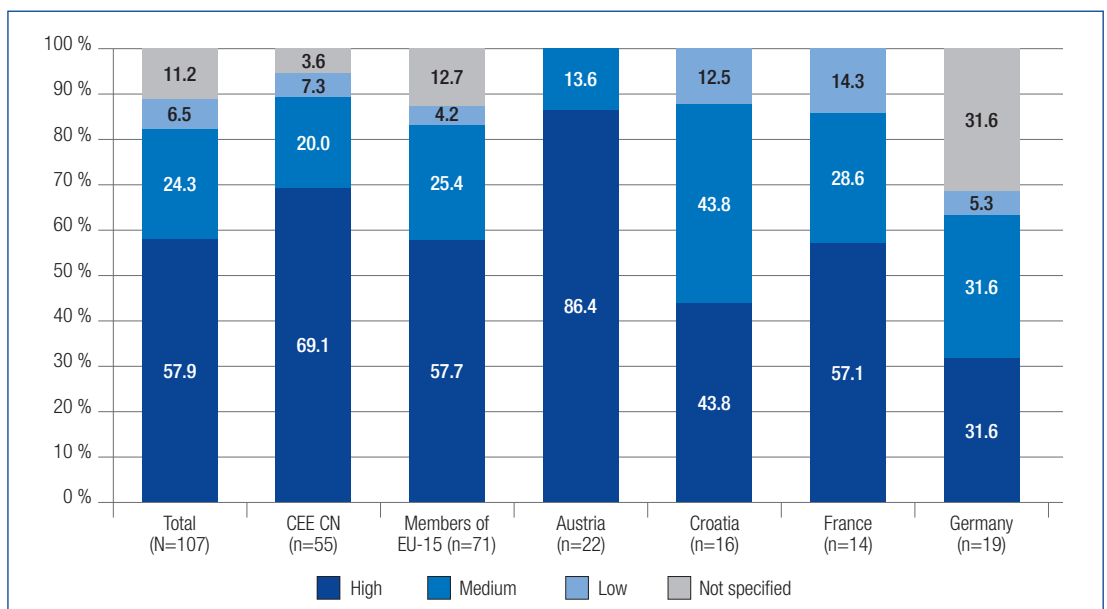
Within the group of cluster managers, there are some remarkable differences regarding the interest in training: While more than 60 % of managers in cluster organisations established after 1999 have high interest in 'leadership and team management' training, only one third (33.3 %) of the managers in older ones show an interest for training in this field (see Graph 18).

Looking at training interests of cluster managers by country, there is a significant difference especially in the field of 'innovation management tools'. Austrian cluster managers are highly interested in training in this field (86.4 %). By contrast, cluster managers from Croatia (43.8 %) and Germany (31.6 %) have a rather low interest in being trained on 'innovation management tools'.

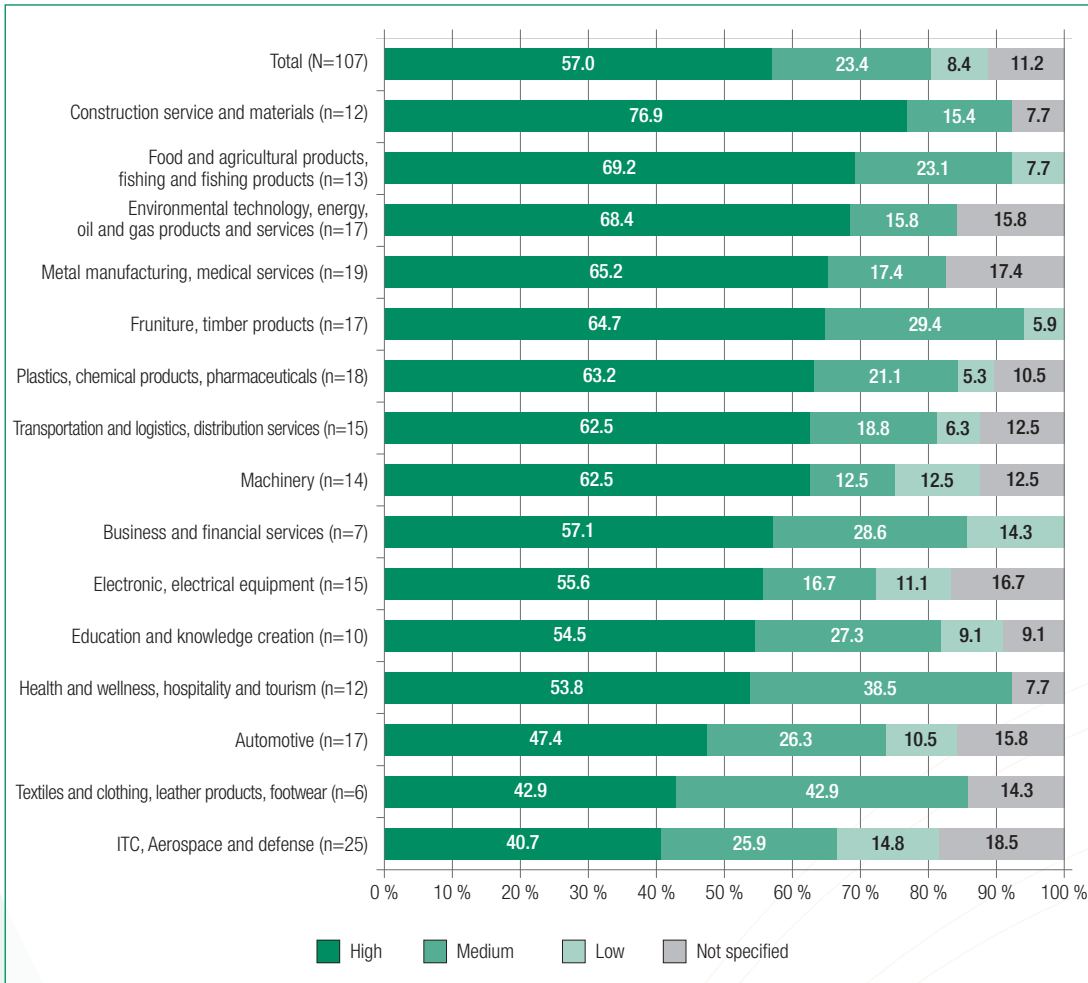
**Graph 18 – Leadership capacities, team management (interest in training by age of cluster organisation)**



**Graph 19 – Innovation management tools (interest in training by country of cluster)**

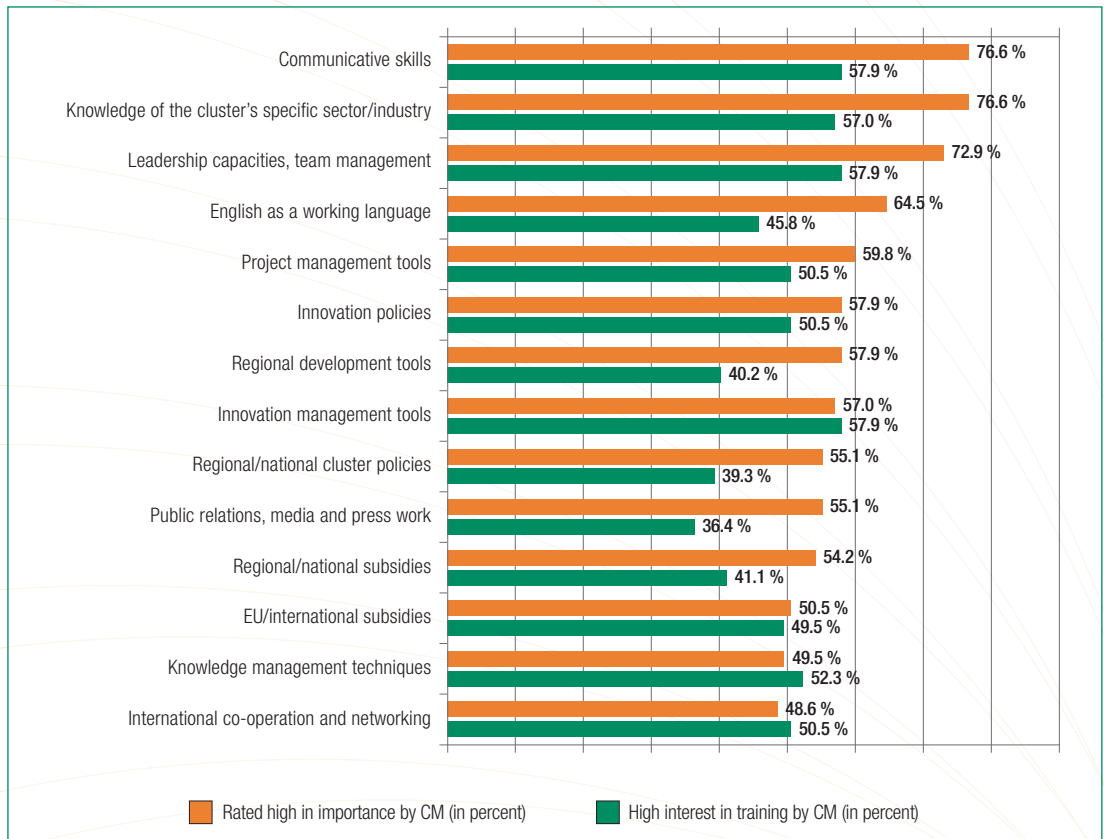


**Graph 20 – Knowledge of the cluster’s specific sector/ industry (interest in training by sector of cluster)**



Further training with respect to ‘knowledge of the cluster’s specific sector/industry’ is especially important in the fields of ecology, energy efficiency and sustainability. Cluster managers in the sector ‘construction service and materials’ (76.9 %) show the highest interest in industry-specific training, followed by cluster managers in the sectors ‘food and agricultural products, fishing and fishing products’ (69.2 %) and ‘environmental technology, energy, oil and gas products and services’ (68.4 %).

Graph 21 – Importance of skills vs. interest in further training of these skills (CM, N=107)

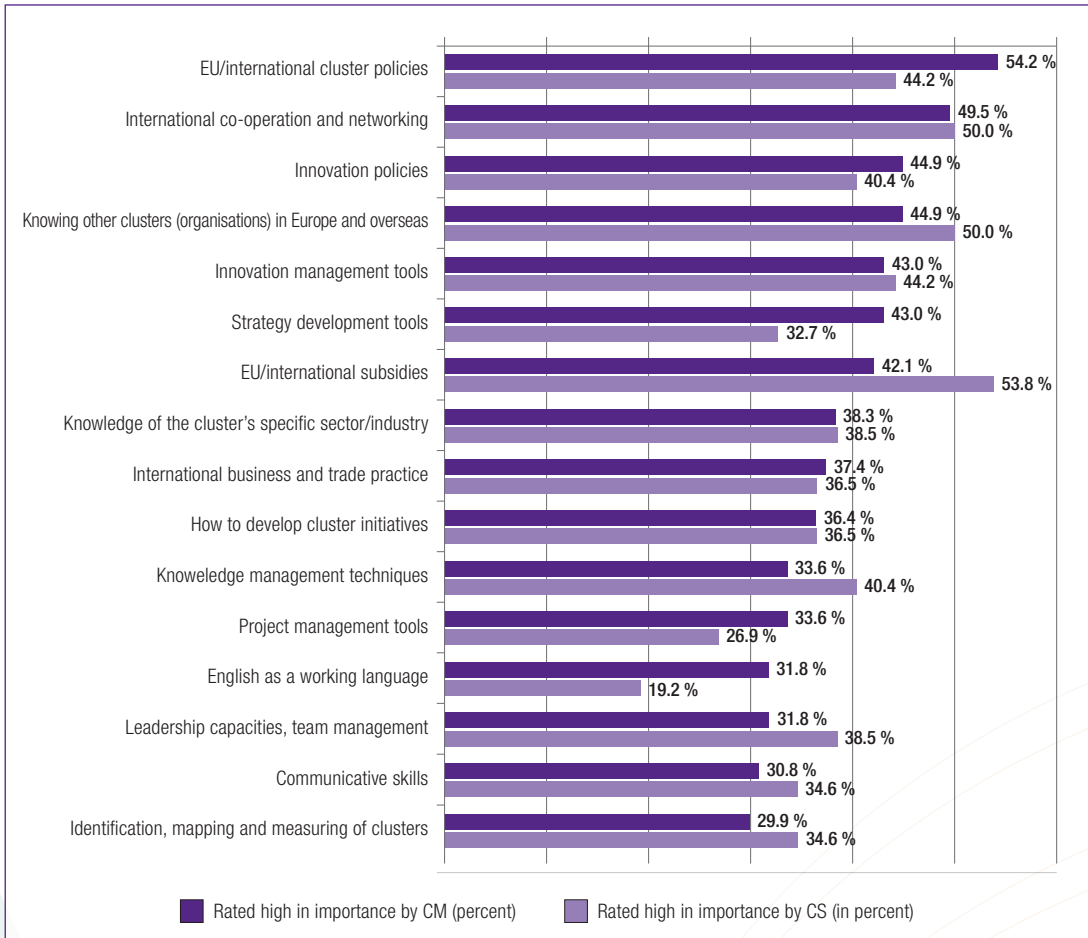


Comparing importance of skills on one hand with the interest in further training of these skills on the other hand – both from the cluster managers point of view – shows that ‘communicative skills’, ‘knowledge of the cluster's specific industry’ and ‘leadership capacities, team management’ rank top. These skills are considered necessary for the work of cluster managers as well as necessary to be further trained. There are also skills where the interest in further training is slightly higher than the importance for the work: These include the field ‘innovation management tools’ which is ranked among the top three in training interest but only ranks 8th in importance.

## 2.2 Interest in training in an international context

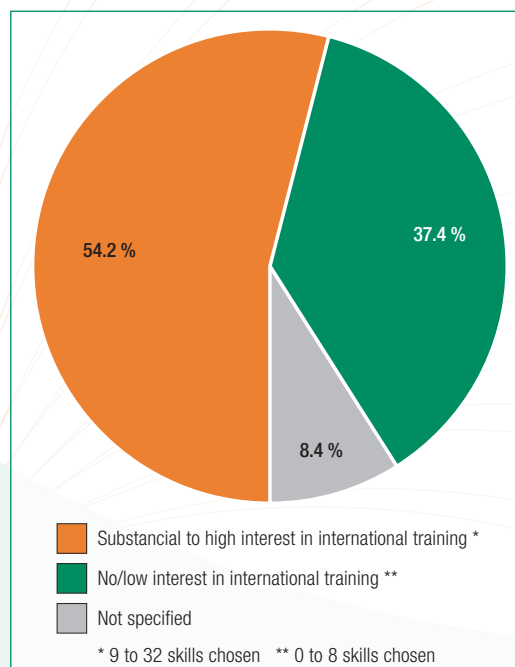
Both CM and CS respondents were asked which skills and areas of competence should be trained preferably in an international context, i.e. together with colleagues and peers from other countries. The CM respondents would like to have an international context in training especially in the fields of ‘EU/international cluster policies’ (54.2 %), ‘international co-operation and networking’ (49.5 %), ‘innovation policies’ (44.9 %) as well as ‘knowing other clusters (organisations) in Europe and overseas’ (44.9 %). In principle, CS respondents have a similar view, but would also appreciate an international training context in the area of ‘EU/international subsidies’ (53.8 %) which is not ranked that high among the CM respondents. So, overall, an international set-up of training is mainly requested for subjects which are ‘international’ by nature as well as for innovation-related subjects.

**Graph 22 – Interest of CM and CS in training in international context**



In order to identify groups of cluster managers according to their propensity to international training settings, the individual respondents were classified in terms of how many (out of 32) skills they would like to be trained in at an international level. The proportions in Graph 23 therefore show the general degree of interest in international training settings. As shown, more than half of the cluster managers (54.2 %) have high interest in international training environments, while only 37.4 % have no or low interest in training in international context.

**Graph 23 – Interest of CM in international training (summary of interest groups)**



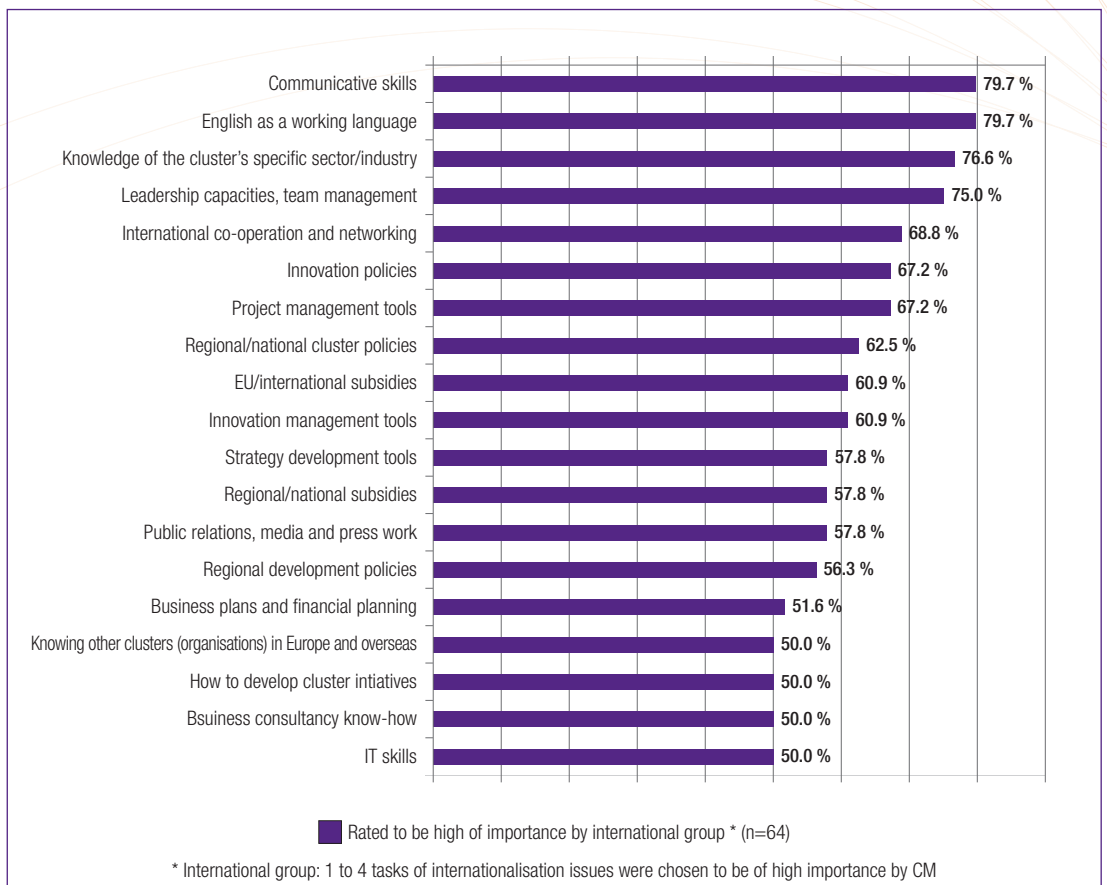
### 2.3 Analysis of internationally most active cluster managers in terms of important skills and training interest

As shown earlier in the report, almost 60 % of the CM respondents consider at least one important task related to internationalisation. This 'internationally active group' of cluster managers differs from the overall sample of cluster managers in terms of the skills and areas of competence.

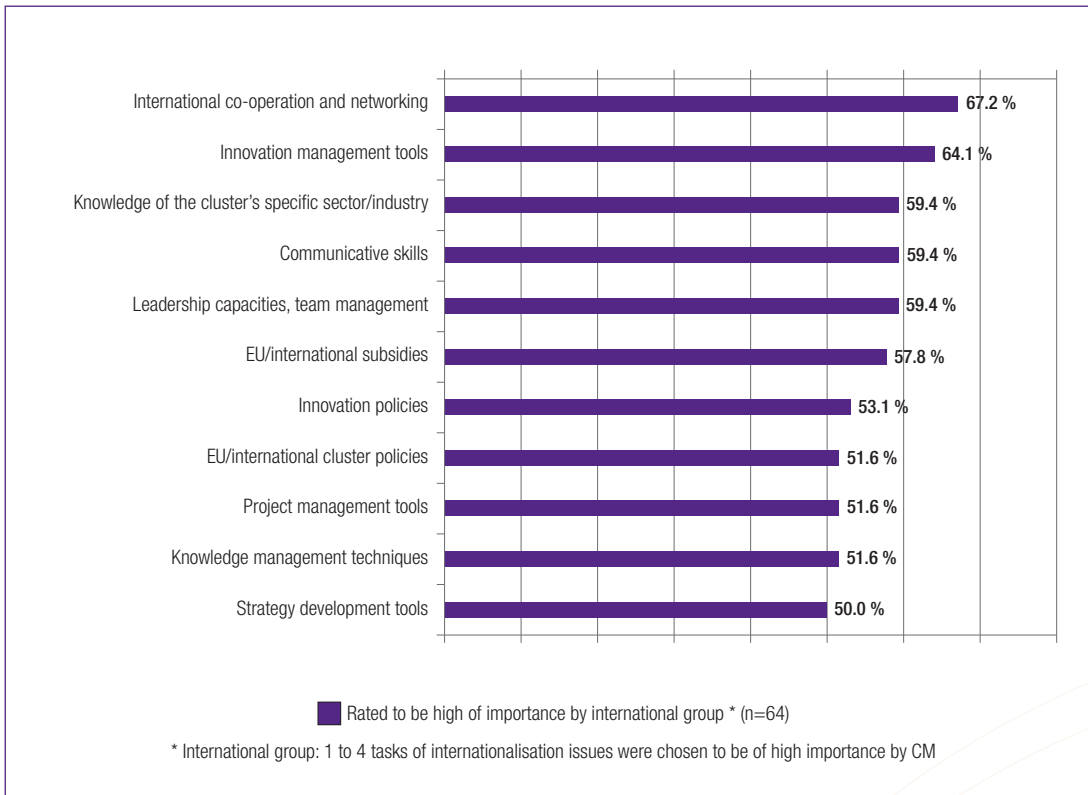
'Communicative skills' (79.7 %) are the most important skills for the internationally active group as well as for all cluster managers. However, in the internationally active group, 'English as a foreign language' is rated equally important (79.7 %) while this skill only ranks 4<sup>th</sup> when taking a look at the total of CM respondents (64.5 %). The internationally active group also considers 'international co-operation and networking' (68.8 %), 'innovation policies' (67.2 %) and 'project management tools' (67.2 %) more important than the overall total of cluster managers.

Graph 25 presents the training interests of the internationally active group of cluster managers and reveals that this group is most interested in training in 'international co-operation and networking' (67.2 %) which is not ranked among the top 5 when analysing the total of all cluster managers. Other training interests of the international group of cluster managers basically correspond to those of all CM respondents. However, subjects as 'EU/international subsidies' (57.8 %) or 'EU/international cluster policies' (51.6 %) are somewhat more requested by the internationally active group.

**Graph 24 – Internationally active group of CM: importance of special skills**



**Graph 25 – Internationally active group of CM: interest in training**



### 3 Methods and organisation of training

#### 3.1 Decision to attend a training

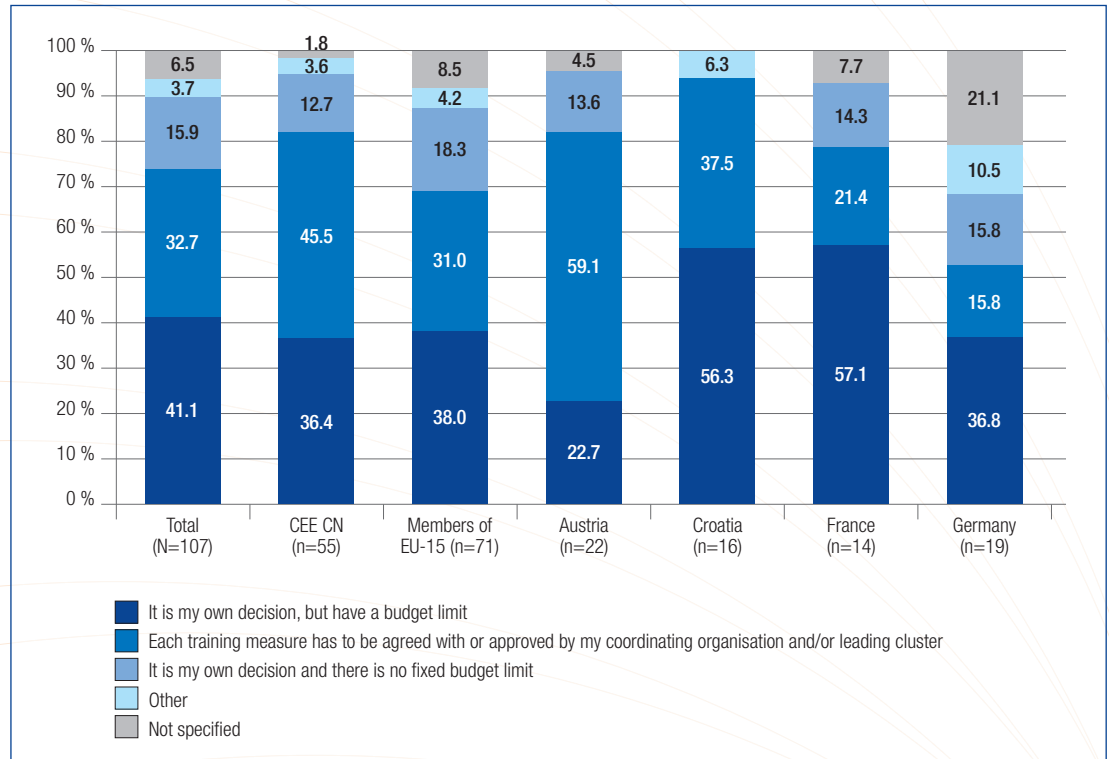
Who decides on training for cluster managers? Is it the cluster managers themselves, who decide on which training they want to attend? Do they need to ask their cluster members, any advisory boards or stakeholders? Understanding the decision procedures is an important background information when designing educational programmes for cluster managers.

41.1 % of the cluster managers decide on their own when it comes to attend a training, but they have a budget limit. Nearly one third of the CM respondents (32.7 %) stated that each training has to be agreed with or approved by their stakeholders and/or leading cluster companies. For only 15.9 % of the cluster managers it is their own decision and they also do not have any fixed budget limit.

When comparing this results by country, there are some remarkable differences: The share of cluster managers deciding on their own but having a budget limit is relatively

high in Croatia (56.3 %) and France (57.1 %). By contrast, in Austria 59.1 % of the cluster managers say that each training measure has to be agreed with or approved by stakeholders and/or leading cluster companies, which is a significantly higher share than in other countries.

Graph 26 – Decision on training  
(by country of cluster) (CM, N=107)



3.2 Time resources for attending a cluster management training

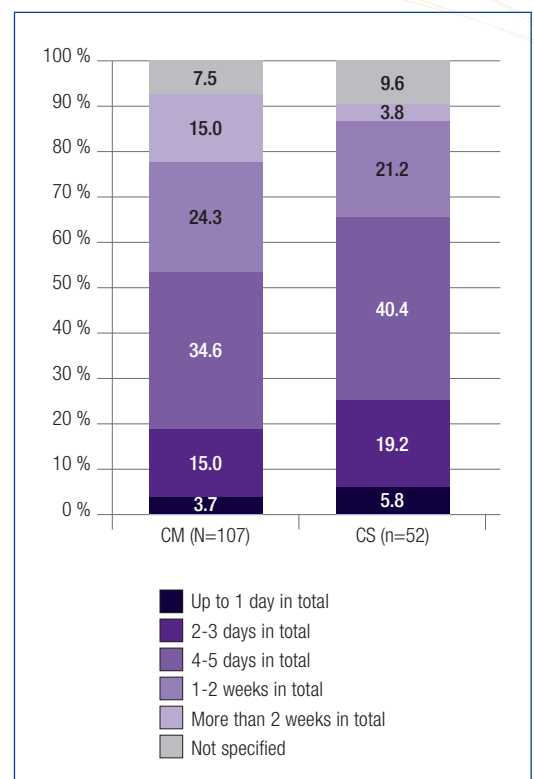
Restricted time resources are a major barrier in any further education effort. Therefore cluster managers as well as cluster stakeholders were asked about how much time they consider reasonable for cluster management trainings.

Question:

CM: How much time would you be ready to spend for attending a training on cluster management per year?

CS: How much time would be reasonable for cluster managers and their teams to spend for attending a training on cluster management per year?

Graph 27 – Time ready to spend (CM) / time reasonable for CM to spend (CS) for training on cluster management per year



When comparing the views of cluster managers and cluster stakeholders, there are similar attitudes towards how much time could or should be spent in order to attend cluster management training. For both respondent groups, it appears most feasible to spend four to five days in total per year (CM: 34.6 %, CS: 40.4 %). Only a small minority of cluster managers could or would spend more than two weeks per year.

When comparing countries, it is especially the Croatian cluster managers, who are ready to spend more than two weeks in order to attend a training (62.5 %). By contrast, in France time resources seem most scarce.

### 3.3 Money resources available for training fees

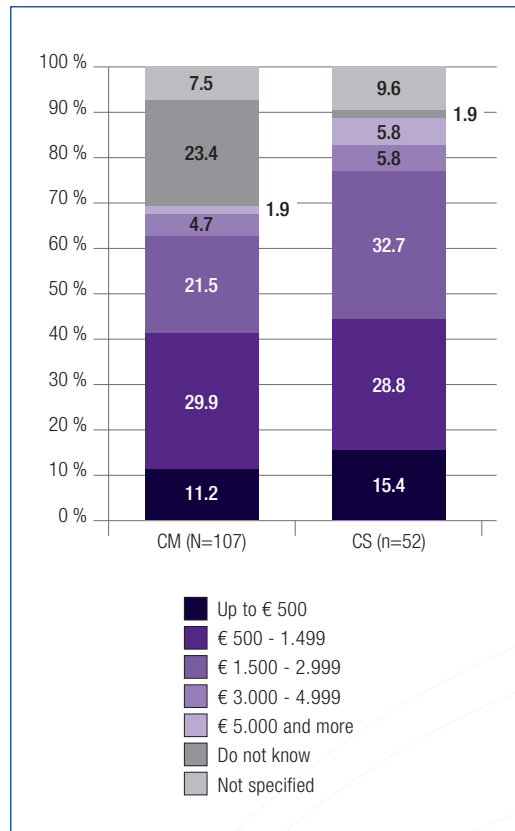
Next to time also financial resources constitute an important constraining factor for further education.

**Question:**

CM: What annual amount of money is at your disposal for course fees in general?

CS: What annual amount of money would be reasonable to spend on training fees per cluster manager (or team member)?

**Graph 28 – Annual amount of money at disposal (CM) / annual amount of money reasonable to spend (CS) for course/training fees for cluster managers**



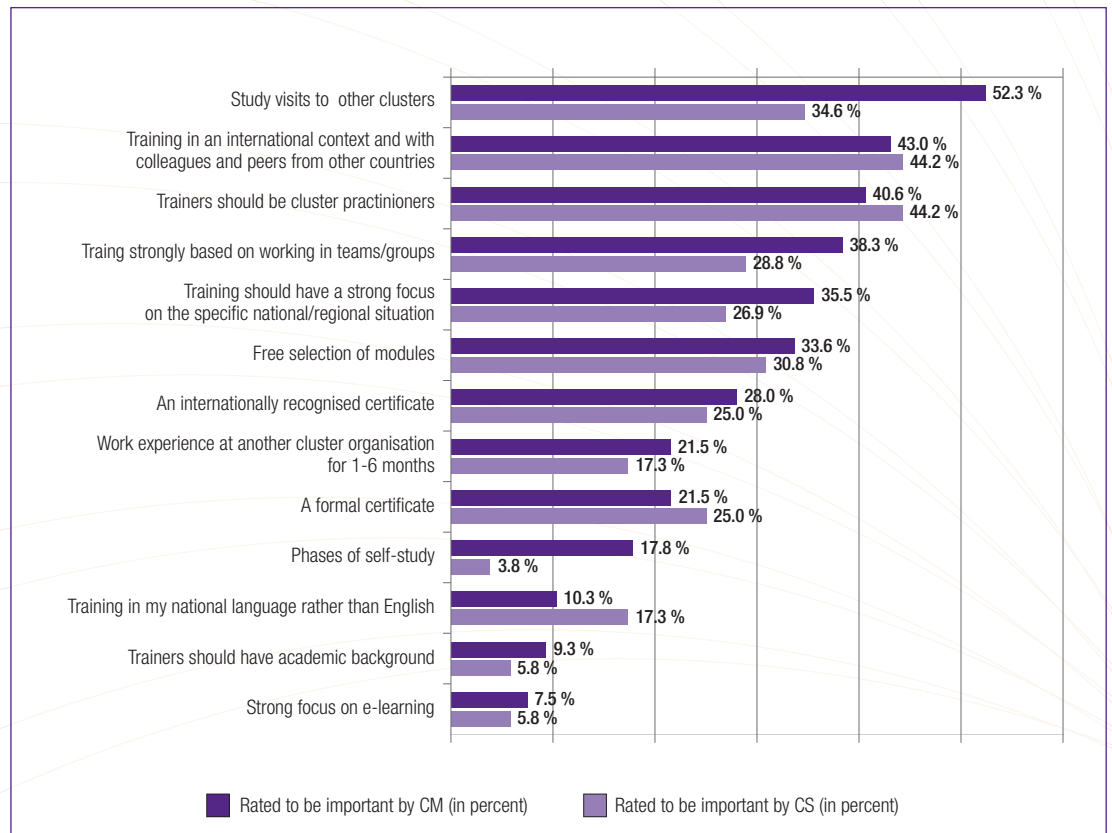
Comparing cluster managers and cluster stakeholders, the first aspect to notice is that nearly one fourth (23.4 %) of the cluster managers does not know what annual amount of money is at their disposal for course fees. Apart from that, there are similar answers concerning the annual amount of money available to spend: 29.9 % of the cluster managers and 28.8 % of the cluster stakeholders indicate an amount of € 500 to € 1,499. Furthermore, around one fifth of the cluster managers (21.5 %) and one third of the cluster stakeholders (32.7 %) refer to a margin of € 1,500 to € 2,999 in order to cover possible training costs. Only a small minority can afford more than € 3,000.

When comparing the answers of cluster managers by country, it turns out that money resources are most scarce in Croatia with 62.6 % of the cluster managers not ready to spend more than € 1,499 per year. In Austria, money is less a barrier with only 22.7 % of cluster managers restricted by this threshold. (Germany: 52.6 %, France: 35.7 %).

### 3.4 Other aspects of training organisation

In the survey, cluster managers and cluster stakeholders were asked about their preferences regarding various other aspects of organising and designing cluster management training (see Graph 29).

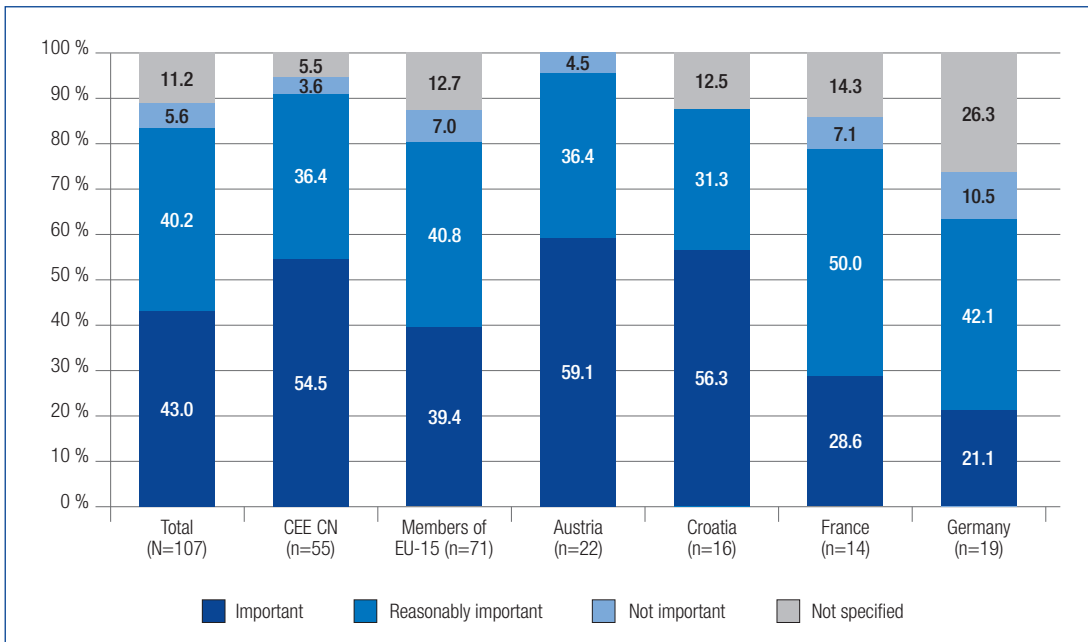
**Graph 29 – Importance of aspects regarding trainings on cluster management (CM: N=107, CS: N=52)**



Generally speaking, cluster managers as well as stakeholders attach importance to issues connected with ‘mutual learning’, i.e. exchange with other clusters, colleagues and experts in cluster management: 52.3 % of the cluster managers emphasise ‘study visits’ and 43.0 % would like ‘training in an international context with colleagues and peers from other countries’ to be part of a cluster management training programme. Obviously, trainers should be cluster practitioners rather than having an academic background.

Having English as a training language does not constitute a problem as only some 10 % of cluster managers explicitly prefer their own national language. Furthermore, a strong e-learning component is also not requested by the respondents.

**Graph 30 – Training in an international context and with colleagues and peers from other countries (by country of cluster)**



When comparing country results (see Graph 30), it is interesting to note that it is especially cluster managers in Austria (59.1 %) and Croatia (56.3 %), who wish to have training in an international context. Moreover, members of the CEE-ClusterNetwork (54.5 %) find this aspect to be more important than cluster managers from the EU-15 (39.4 %). Country size as well as a higher outward orientation in the new Member States may be explaining factors in this respect.

## CEE-ClusterNetwork partners:



### Upper Austria – Oberösterreichische Technologie- und Marketinggesellschaft m.b.H (TMG)

The Upper Austrian Technology and Marketing Company (TMG) is Upper Austria's business location and innovation agency and has two core Business Areas consisting of Location Marketing and Innovation & Technology. Together with its partners, TMG forms an effective company group, which offers an extensive range of innovation services. In addition, TMG exercises an important control and co-ordination function within Upper Austria's Innovation Network. It designs Upper Austria's location and innovation policy and serves companies as a central contact point for the location of businesses in the region. TMG also incorporates the management of innovation investments. These include Upper Austrian Research (100 % TMG holding), CATT Innovation Management GmbH (100 % TMG holding), Education Highway GmbH (74 % TMG holding) and Clusterland OÖ GmbH (61 % TMG holding).



### Lower Austria – ecoplus.

#### The Business Agency of Lower Austria Ltd.

Activities of ecoplus range from development and management of industrial parks, investment promotion, promotion of important regional projects to facilitated access to R&D institutions. To support SMEs in their international activities ecoplus established business agencies in 5 CEE countries. Since 2001 ecoplus has developed and implemented 6 cluster initiatives. A team of currently 20 employees provides services to cluster partners in five main areas: cooperation and innovation, information, PR, qualification and internationalization. Consolidation under one umbrella enables Lower Austrian cluster managements to use synergies, learn from each other and develop standards.



### West Pannon – West-Transdanubian Regional Development Agency (WTRDA)

WTRDA is the fundamental institution of development, innovation, strategic planning and programme implementation in the region. The Agency plays a significant role in establishing a regional 'future vision' and aims for involving all relevant players. WTRDA manages billions of national and EU (ERDF) funds every year. It has more than 90 highly trained full time employees and a section devoted to multinational project management. It

runs the West Pannon Representation Office in Brussels. It has launched and managed the first cluster in Hungary (Pannon Automotive Cluster) and helped the initiation of other clusters in the region.



ITG SALZBURG  
IHR KOMPETENTER PARTNER FÜR  
INNOVATION UND TECHNOLOGIE

### Salzburg – Innovation & Technology Transfer Salzburg (ITG Salzburg)

The Innovation & Technology Transfer Salzburg (ITG Salzburg) is tasked with stimulating commercial and research activities in Salzburg with a focus on supporting cooperation and coordinating the technology- and innovation-related policies of the Salzburg government. The ITG Salzburg has been managing the Digital Media Cluster Salzburg since the start of 2004. Further it is tasked with identifying and developing new areas and focal points for clustering and networking within the economic region of Salzburg.



### Tyrol – Tiroler Zukunftsstiftung

As location agency of Tyrol, the Tiroler Zukunftsstiftung develops, promotes and markets the Tyrolean economy and science. Thereto it encourages the transfer of new technologies from Tyrolean research institutions into the economy and connects Tyrolean companies with research establishments. It supports the development of important economic fields such as life sciences or renewable energies in clusters and directly promotes projects in cooperative research and technology. The Tiroler Zukunftsstiftung also encourages the development as well as the settlement and the start of companies and research institutions in the business location through professional consultation and support.



### Slovenia – Maribor Development Agency – Euro Info Centre Maribor (Podravje Region – Slovenia)

The research activities and consulting work of the Maribor Development Agency are dedicated to co-ordination of activities with institutions in the area of economic development and preparation of the Regional Development Plan, co-ordination of regional activities and implementation of the most important projects. This agency is the host structure of Euro Info Centre which is eligible to apply for EU projects and is actively involved in the promotion of cross border cooperation activities.



### Czech Republic – CZECHINVEST

CzechInvest's objective is to strengthen the competitiveness of the Czech economy through provision of support for SMEs and business infrastructure as well as through the acquisition of direct foreign investments in the areas of manufacturing, business support services and technology centres. CzechInvest is exclusively authorized to file applications for investment incentives and acts as the implementing agency for the EU Operational Programme Enterprise and Innovation, which is aimed at providing financial support for enterprises in the Czech Republic. CzechInvest has been in charge of development and implementation of the Czech national cluster programme.



### Slovakia – BIC Bratislava, spol. s r.o

The mission of Business and Innovation Centre Bratislava is business and innovation consulting, transnational technology transfer, financial consulting, regional development, support in the EU Framework Programmes for research, technology development and innovation (FP7 & CIP), project management and investment consulting. BIC Bratislava is a co-ordinator of the Enterprise Europe Network representation in Slovakia, one of the co-founders of the SPICE (Science Parks and Innovation Centre Expert) Group and member of the Slovak Association of BICs and RAICs. It is also responsible for development and implementation of the Automotive Cluster in Trnava region.



### Poland – Agency of Industrial Development – Agencja Rozwoju Przemysłu (ARP)

The ARP (established in 1991) is one of the largest governmental agencies which performs the following activities: restructuring of enterprises, development of business infrastructure in regions, support to creation of innovative companies, granting of loans and guarantees to enterprises, capital investments. The ARP has in its structure specialized Dpt. of Innovative Economy and Dpt. of Instruments for Regional Development. The ARP has an extensive experience in project management i.e. projects' formal assessment, monitoring of financing and execution, expenses eligibility, refunding procedures, etc.



AUTONOME PROVINZ BOZEN - SÜDTIROL  
Abteilung S4 - Innovation, Forschung, Entwicklung und Grosswirtschaft



PROVINCIA AUTONOMA DI BOLZANO - ALTO ADIGE  
Ripartizione S4 - Innovazione, Ricerca, Sviluppo e Cooperazione

### South Tyrol – TIS Innovation Park

TIS Innovation Park based in Bolzano, South Tyrol, acts as a regional development agency under the mandate of the Autonomous Province of Bolzano. TIS staff supports and consults business start-ups, helps companies to establish networks and fosters interaction between science and business. Technology transfer and innovation activities in South Tyrol are carried out in order to raise the level of technical and scientific knowledge in the region. TIS is responsible for implementation and coordination of 4 cluster initiatives. The goal of TIS is to support local competitiveness through innovation and sustainable growth to secure SME's development and regional prosperity.



HRVATSKA UDRUGA POSLODAVACA  
CROATIAN EMPLOYERS' ASSOCIATION

### Croatian Employers' Association – National Center for Clusters (CEA NCC)

Croatian Employers' Association is a voluntary, non-profitable independent employers' association with 24 sectoral associations and 6,000 members. National Center for Clusters founded in 2006 is one of CEA's strategic projects. NCC is managing 5 clusters - automotive, shipbuilding, garment, agricultural equipment, interiors. CEA NCC is one of key stakeholders in cluster development in Croatia. Strategic partner is the Ministry of Economy, Labour and Entrepreneurship. Goals of CEA NCC are networking of Croatian clusters and strategic alliances with other EU clusters, reduction of costs and new markets for cluster members.

### CLUSTERLAND OBERÖSTERREICH GmbH

#### Upper Austria – Clusterland Oberösterreich GmbH.

Clusterland Upper Austria, founded in 2005, manages 5 clusters (automotive, plastics, wood & timber construction, health technology, mechatronics) and 3 networks (human resources, design & media and environmental technologies). Clusterland is owned by TMG (61 %), the Chamber of Commerce (19.5 %) and the Federation of Austrian Industries (19.5 %), has a staff of 40 employees and a turnover of around 5 Mio. €. Clusterland has a history of 11 years of cluster management, involving 1500 companies. The focus lies on 'innovation through cooperation' and the statistics backing up this statement are impressive: 290 cooperation projects were initiated since 1998.



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