



Innovative and Industrial Clusters in Russia: Current Agenda of the State Policy

Evgeniy Kutsenko

National Research University - Higher School of Economics

13-th session of the Russian-French Working Group on Innovative Cooperation.
Skolkovo Innovative Centre, December, 23 2015



Cluster Initiatives in Russia: 2015



Карта кластеров России

Карта

Реестр

О проекте

Контакты

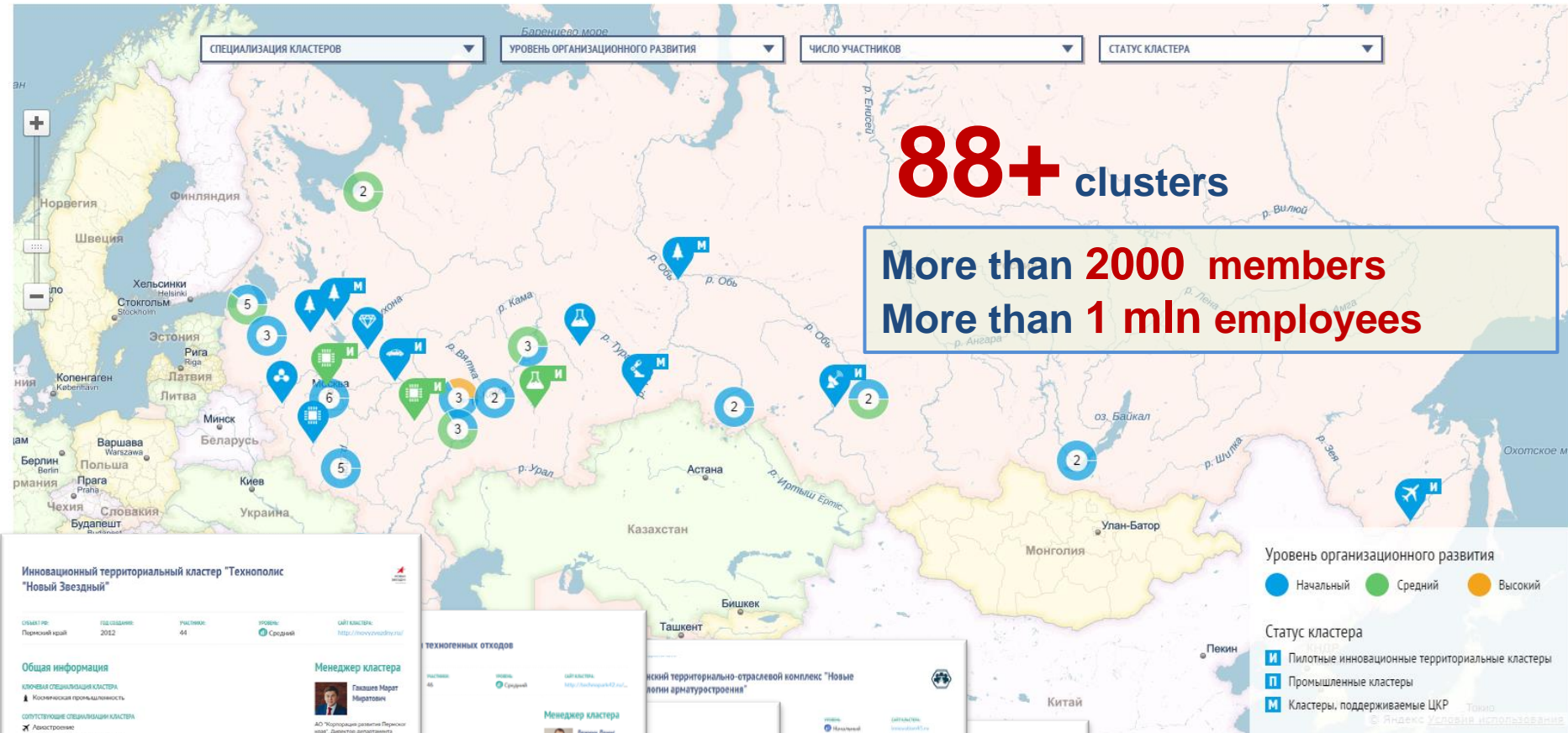
КЛАСТЕРЫ

ВЫХОД

СПЕЦИАЛИЗАЦИЯ КЛАСТЕРОВ УРОВЕНЬ ОРГАНИЗАЦИОННОГО РАЗВИТИЯ ЧИСЛО УЧАСТНИКОВ СТАТУС КЛАСТЕРА

88+ clusters

More than 2000 members More than 1 mln employees



Уровень организационного развития

● Начальный ● Средний ● Высокий

Статус кластера

И Пилотные инновационные территориальные кластеры
П Промышленные кластеры
М Кластеры, поддерживаемые ЦКР

Инновационный территориальный кластер "Технополис "Новый Звездный"

СВЕТЛОГОРСКИЙ РАЙОН, ПЕРМСКИЙ КРАЙ ГОД СОЗДАНИЯ: 2012 ЧИСЛО УЧАСТНИКОВ: 44 УРОВЕНЬ: Средний САЙТ КЛАСТЕРА: <http://newstar.vsevolod.ru/>

Общая информация

Ключевая специализация кластера: Кошенильная промышленность

Сопутствующие специализации кластера: Австроинструмент; Кошенильная промышленность

Производство машин и оборудования (в т.ч. станков и спецтехники, подъемного и гидравлического оборудования, роботов)

Статус кластера: Включен в перечень пилотных инновационных территориальных кластеров

Ключевые игроки основной специализации:

Менеджер кластера: Гасашев Марат Миратович

АО "Корпорация развития Пермского края", Дирекция департамента кластерного развития
Р. Россия, Пермский край, Пермь, ул. Лермонтовская, 52
Т: +7 342 212 17 47
E: marat.gaskashev@yandex.ru

Кластер технологических отходов

УРОВЕНЬ: Средний САЙТ КЛАСТЕРА: <http://cluster.krasnodar42.ru/>

Менеджер кластера: Лавинин Денис Сергеевич

ООО "Удальский кластер"
Инициативный кластер "Удальский кластер"
Р. Россия, Краснодарский край, Удальский район, ст. Удальская, 1
Т: +7 3842 77 88 70
Т: +7 3842 923 27 54
E: d.lavinin@udalskycluster42.ru

Инициативный территориально-отраслевой кластер "Новые долины агротуризма"

УРОВЕНЬ: Начальный САЙТ КЛАСТЕРА: <http://www.cluster-agrotourism.ru/>

Менеджер кластера: Крушицкая Ольга Игоревна

АО "Корпорация развития Пермского края"
Р. Россия, Пермский край, Пермь, ул. Лермонтовская, 52
Т: +7 342 212 17 47
Т: +7 342 883 26 56
E: olga.krushitskaya@permcra.ru

Инициативный территориально-отраслевой кластер "Новые долины агротуризма"

УРОВЕНЬ: Начальный САЙТ КЛАСТЕРА: <http://www.cluster-agrotourism.ru/>

Менеджер кластера: Насибуллин Александр Равильевич

Инициативный кластер "Новые долины агротуризма"
Р. Россия, Республика Башкортостан, Республика Башкортостан, г. Уфа, ул. Арслановская, 14
Т: +7 352 260 01 20
Т: +7 900 147 54 12
E: alexander.nasibullin@gmail.com

Инициативный территориально-отраслевой кластер "Новые долины агротуризма"

УРОВЕНЬ: Начальный САЙТ КЛАСТЕРА: <http://www.cluster-agrotourism.ru/>

Менеджер кластера: Курбанова Анна Николаевна

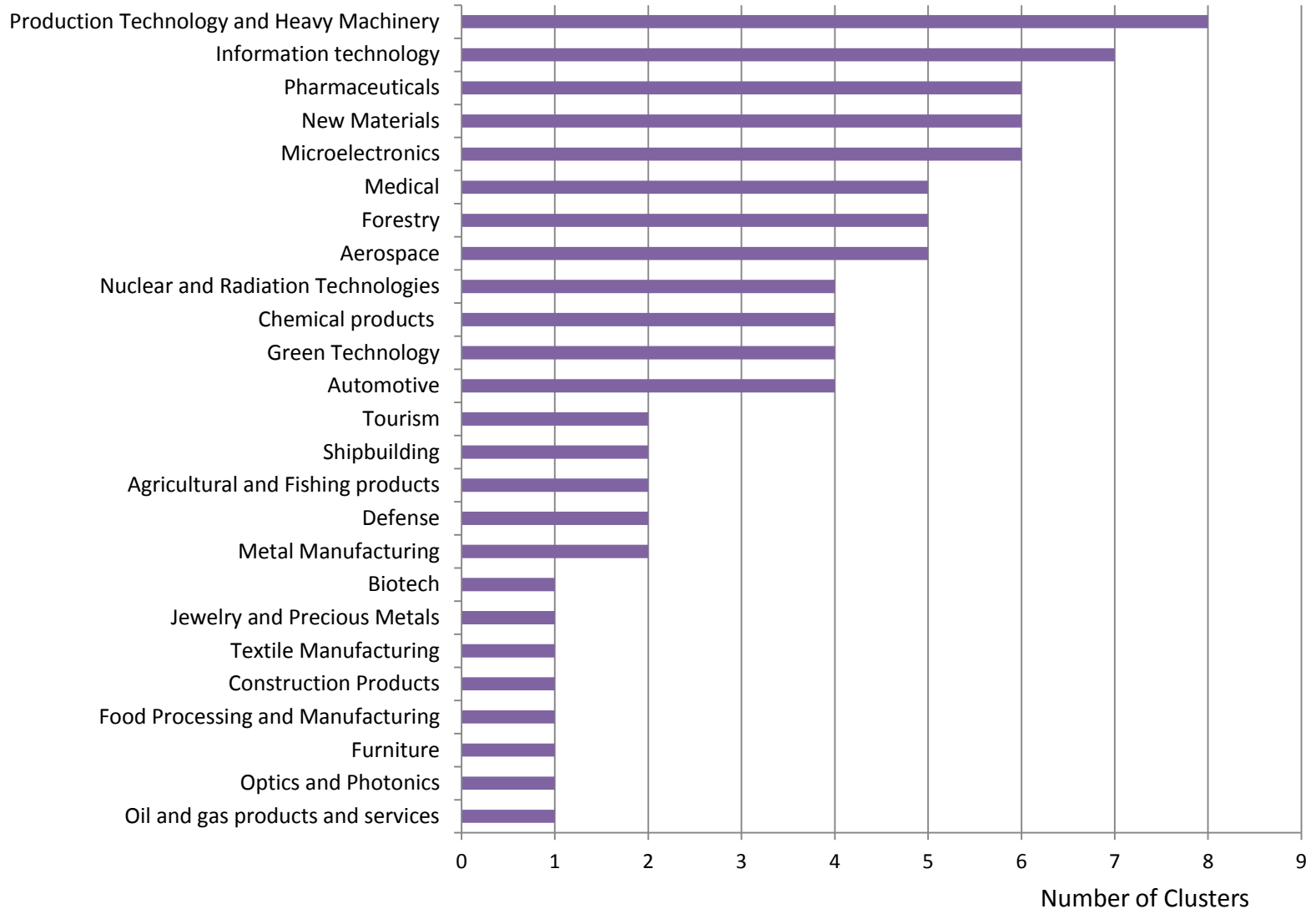
АО "Корпорация развития Пермского края"
Р. Россия, Пермский край, Пермь, ул. Лермонтовская, 52
Т: +7 342 212 17 47
Т: +7 342 327 08 07
E: anna.kurbanova@permcra.ru



map.cluster.hse.ru



Sectorial Orientation of Cluster Initiatives in Russia: the Majority Operate in Hi-tech Industries





Cluster Policy in Russia: Stepping-up of Efforts

Ministry for Economic Development of Russia

2008

Long-Term Development Concept-2020

Methodical Guidance on Regional Cluster Policy in Russia

Regional Cluster Policy Implementation

2010

Subsidy allocation to support the creation and work of regional Centres for cluster development

2011

Innovative Development Strategy of the Russian Federation until 2020

2012

Designing of Innovative cluster development programmes; selection of the pilot Innovative clusters

2013-2015

Subsidy allocation to support the implementation of pilot Innovative cluster projects

Ministry for Industry and Trade of Russia

2015

Methodical support to industrial clusters' development

Since the end of 2015

Industrial cluster listing

2016

Industrial cluster support



Russian Cluster Policy Key Goals and Approaches

Goals:

First, to provide comprehensive approach to support of new and emerging industries, such as IT, biotechnology, advanced materials, cleantech. It's crucially to build a proper ecosystem around them; define key regions, their roles, enhance cross-regional cooperation.

Second, to revitalize the old industrial agglomerations: aerospace, automotive, nuclear sectors, petrochemical and chemical industries. We need the value chains extension and diversification to the new markets.

Third, to boost competitiveness of SMEs in traditional industries such as food, wood processing, furniture, jewelry and so on. Financing of collaborative projects - is one of the important instruments.

To achieve these goals, it is more important to increase the efficiency of current policy instruments, not only to create new ones. The cluster approach allows:

to structure the professional community and to build a strategic dialogue between its representatives and the public authorities. It helps to improve the quality of governmental decisions based on the expertise of cluster participants, among which there are competitors

to tackle the problem of insufficient coordination between different ministries and agencies and make a next step towards comprehensive support of chosen priorities



Centres for Cluster Development (CCD): Providing the Support for Self-organization

- Established since **2010** within the framework of SME support programme by the Ministry for Economic Development of Russia
- There are CCD in **28 Russia regions**
- **893 mln RUB** allocated altogether (2010 – 2015) to support the CCD

	2010	2011	2012	2013	2014	2015
Subsidy volume from the Federal budget, mln RUB	94	114	120	152	164	248

CCD Efficiency (data provided in 2014)

- 70 clusters are supervised by CCD (11 of them are from the pilot Innovative cluster list)
- 218 joint projects are under implementation by SME – cluster members with the assistance of CCD
- 2,5 K SMEs received services from CCD
- 19,6 mln RUB paid by SMEs for the CCD services



The Programme of Russian Pilot Innovative Clusters

Support Started 3 Years Ago

Process of pilot innovative clusters selection in 2012

94

The total number of cluster applications before April 20, 2012

37

Applications that received high expert estimations

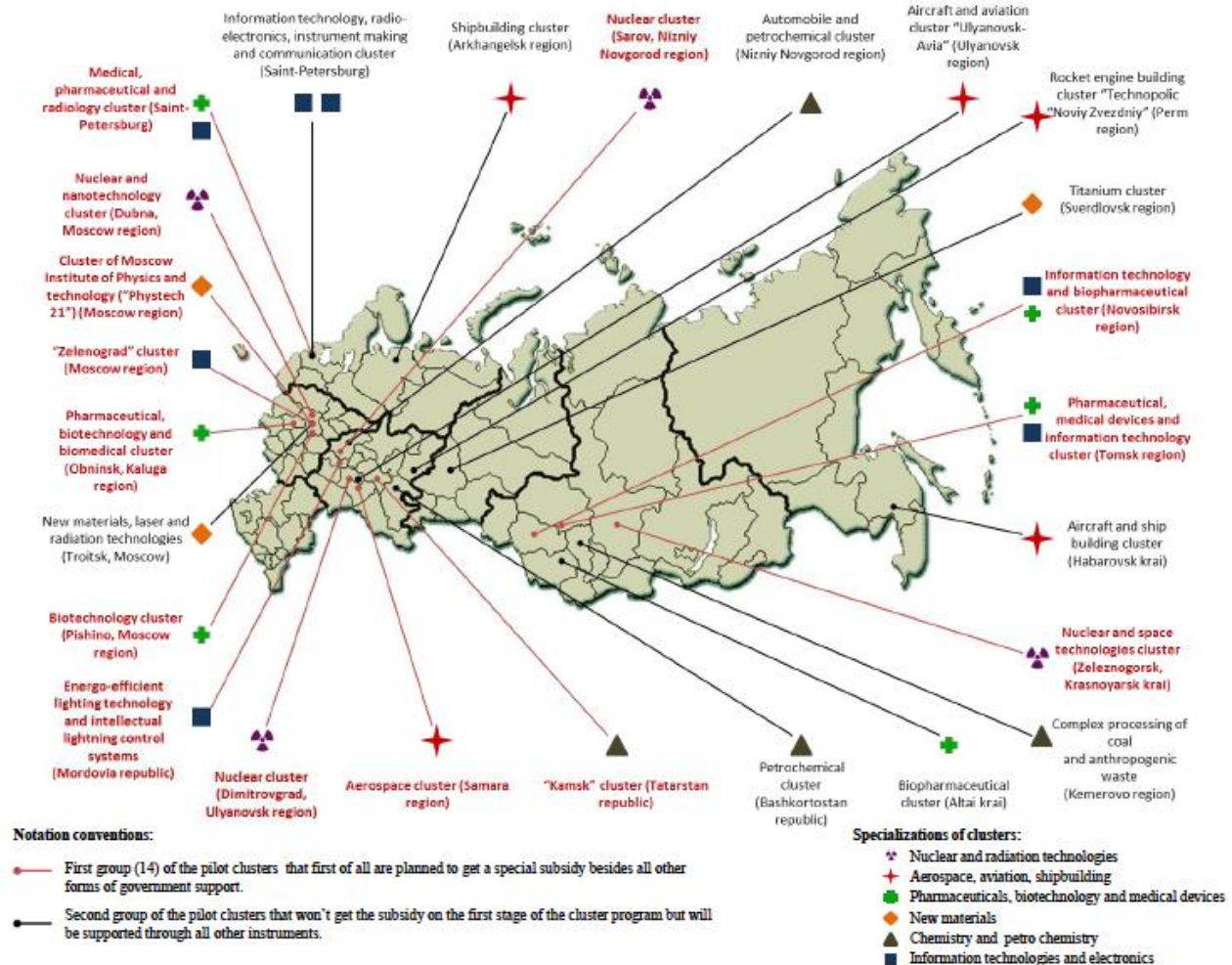
25

Pilot innovative clusters, selected according to the results of their project presentations to the working group

27

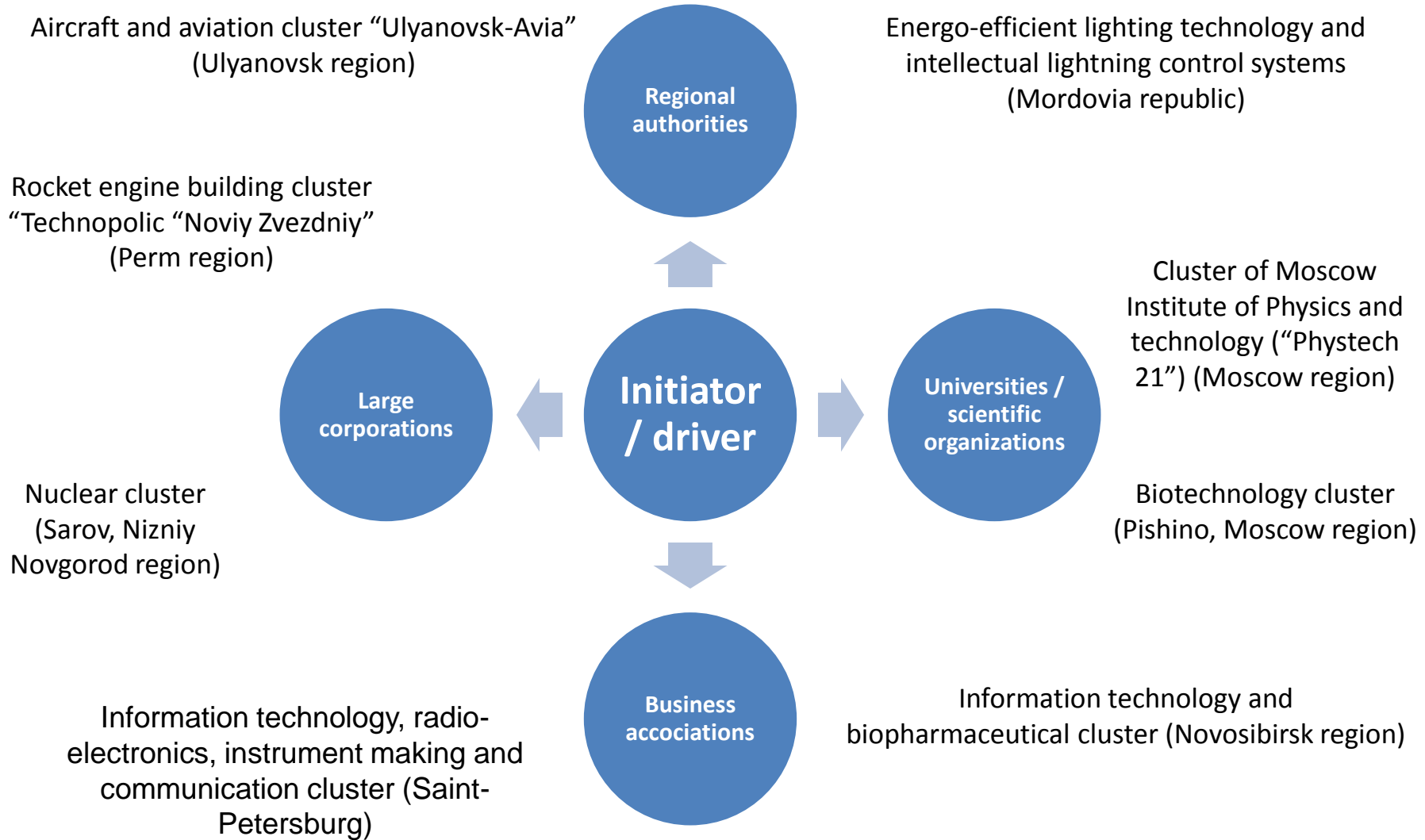
The quantity on pilot innovative clusters at the end of 2015

Map of pilot innovative clusters (25)





Different Types of Initiators

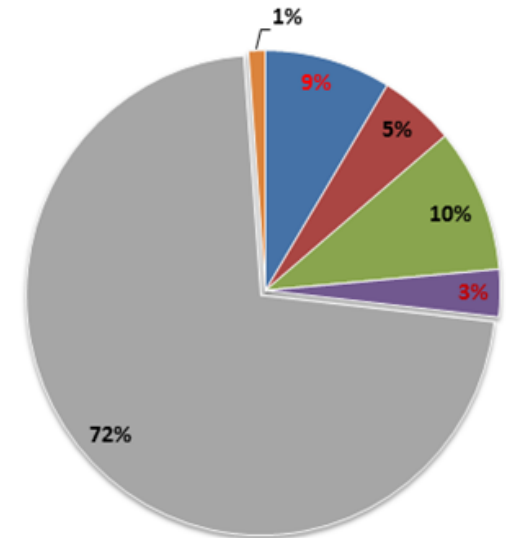
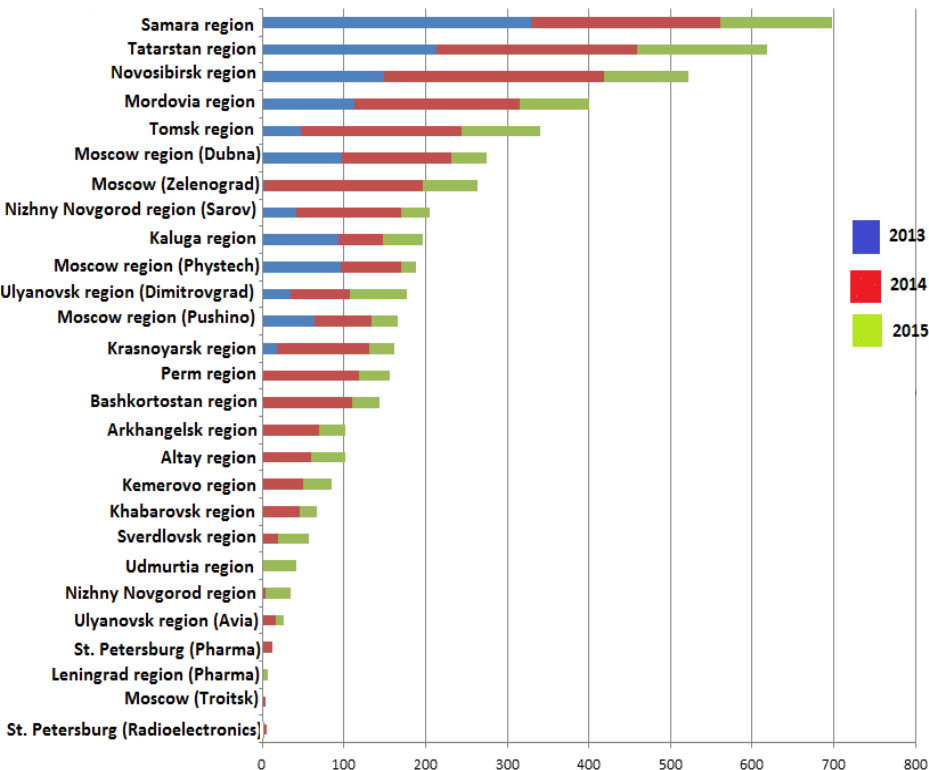




Support Areas of Pilot Innovative Clusters by the Ministry for Economic Development of Russia

Federal subsidy allocation in 2013-2015 by clusters

Federal subsidy allocation in 2013-2015 by costs



- Design and implementation of Cluster development projects
- Market entry services, STI cooperation
- HR training, development, internships
- Exhibition activities (in Russia and abroad)
- Innovative and educational infrastructure development
- Engineering and social infrastructure development



Ministry for Industry and Trade of Russia Cluster Support Programme (launching in 2016)

Action plan for 2016

Industrial clusters selection

Selection of industrial cluster joint projects

Financing industrial cluster members

Assessment and public discussion

In case of proved efficiency: increase of financing + integration with other state cluster support measures

Legal and methodical background

Federal law from 31/12/ 2014 № **488** «On industrial policy in Russia»

Resolution by the Government of the Russian Federation from 31/07/2015 № **779** «On industrial clusters and CMOs»

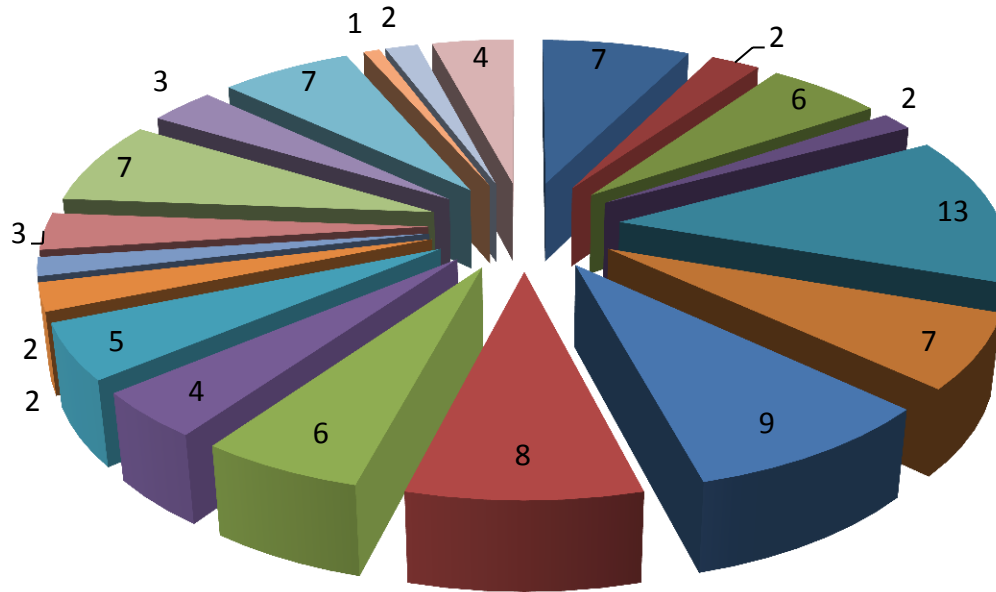
Rules on subsidy allocation to industrial cluster members

Methodical guidance on industrial cluster establishment



Ministry for Industry and Trade Programme Potential Participants

There are **26** pilot innovative clusters supported by the federal subsidy



There are about **125** industrial clusters varying in terms of sectorial orientation, organizational level, scale and scope of activity

- | | |
|---|---|
| ■ Aerospace | ■ Shipbuilding |
| ■ Automotive | ■ Transport Machinery |
| ■ Radioelectronics, optical electronics | ■ Chemicals |
| ■ Medical and Pharma | ■ Biotech |
| ■ Machine Tool Manufacturing | ■ Metallurgy |
| ■ Oil and Gas Machine Manufacturing | ■ Power Generation Machinery |
| ■ Agricultural Machine Manufacturing | ■ Consumer Goods Industry |
| ■ Forestry | ■ Furniture |
| ■ Construction | ■ Manufacture of weapons and ammunition |
| ■ Folk Arts and Crafts | ■ New Materials |



Current Level of Organizational Development of Industrial Clusters



42 industrial clusters have programmes / strategies / concepts of their development. 50% of these documents are approved by regional authorities.



72 industrial clusters have management bodies — CMO or Cluster Council / Steering Committee / General Meeting / Working Group etc.

There are 5 or more industrial clusters located in the regions with mature cluster policy and high industrial capacity

Region	St. Petersburg	Tula region	Moscow	Lipetsk region	Voronezh region	Tatarstan region	Tomsk region	Irkutsk region
Number of industrial clusters	12	9	6	6	6	5	5	5



Ministry for Industry and Trade of Russia: Refunding the Costs on Joint Projects to Produce Import-Substitution Goods

Joint Projects Criteria

Requirements

- There should be at least **2 cluster members involved in the joint project**: one financing the project and the other willing to buy the goods produced within the project.
- **50% of the joint project costs** should be financed by the **project initiator** no later than 12 months after the subsidy allocation.

Support Areas

Process Activities:

- Licensing, certification, testing services;
- HR training;
- Lean-management, cost-management implementation.

Technological Activities:

- New equipment purchasing, transportation, start-up and commissioning services;
- Leasing;
- Debt service payment;
- Software purchasing;
- Feasibility studies.

KPI

- The decrease of total costs on purchasing components from non-cluster members;
- The increase of total costs on purchasing components from the joint project initiator by other cluster participants;
- The increase of jobs with higher salaries compared to the medium level (broken down by regions and the company's size);
- The increase of joint project initiator's added value;
- The increase of joint project participants' revenues from selling goods to non-cluster members



Current Goals of Russian Cluster Policy in 2016

1. Improving the quality of regional innovative and investment strategies. Fostering the emergence of new clusters: innovative, industrial, agricultural, touristic, etc.
2. Improving the quality of cluster management. Strengthening horizontal inter-cluster communications on up-to-date issues (export, etc.). Providing comprehensive support to innovative clusters (synchronization with the activities of Universities, State-Owned Corporations, Institutions for Development). Integration of cluster support measures and other industry support tools by the Ministry for Industry and Trade of Russia.
3. Non-financial cluster support. Launching of E-data bases: Cluster Map of Russia, Cluster Initiative Register (Ministry for Economic Development of Russia), GIS of Industrial Parks, Technology Parks, Clusters (Ministry for Industry and Trade of Russia).
4. Integration of clusters into National Technological Initiative; establishing or transforming clusters to support emerging industries.

Thank you for your attention

ekutsenko@hse.ru



Web-site:
cluster.hse.ru



Educational programs

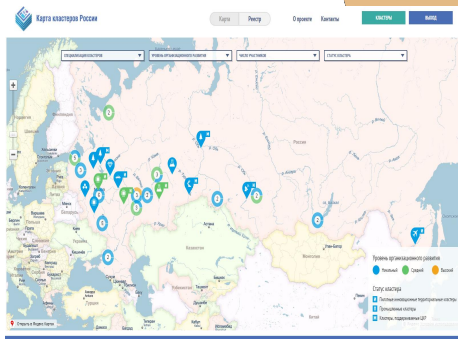
Rating of
innovative
development
of Russian
regions



Russian
cluster
observatory

Russian cluster
mapping

Reports, reviews,
articles



NRU HSE is a member
of TCI Network

