



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

Trade Mission of Russian Federation in Germany



Cluster Initiatives in Russia: 2016



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"

УРОВЕНЬ ОРГАНИЗАЦИОННОГО РАЗВИТИЯ: Средний

СТАТУС КЛАСТЕРА: Пилотный инновационный территориальный кластер

Общая информация

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Менеджер кластера: Галицкий Сергей

Контакты: +7 342 212 17 47, +7 952 339 66 66

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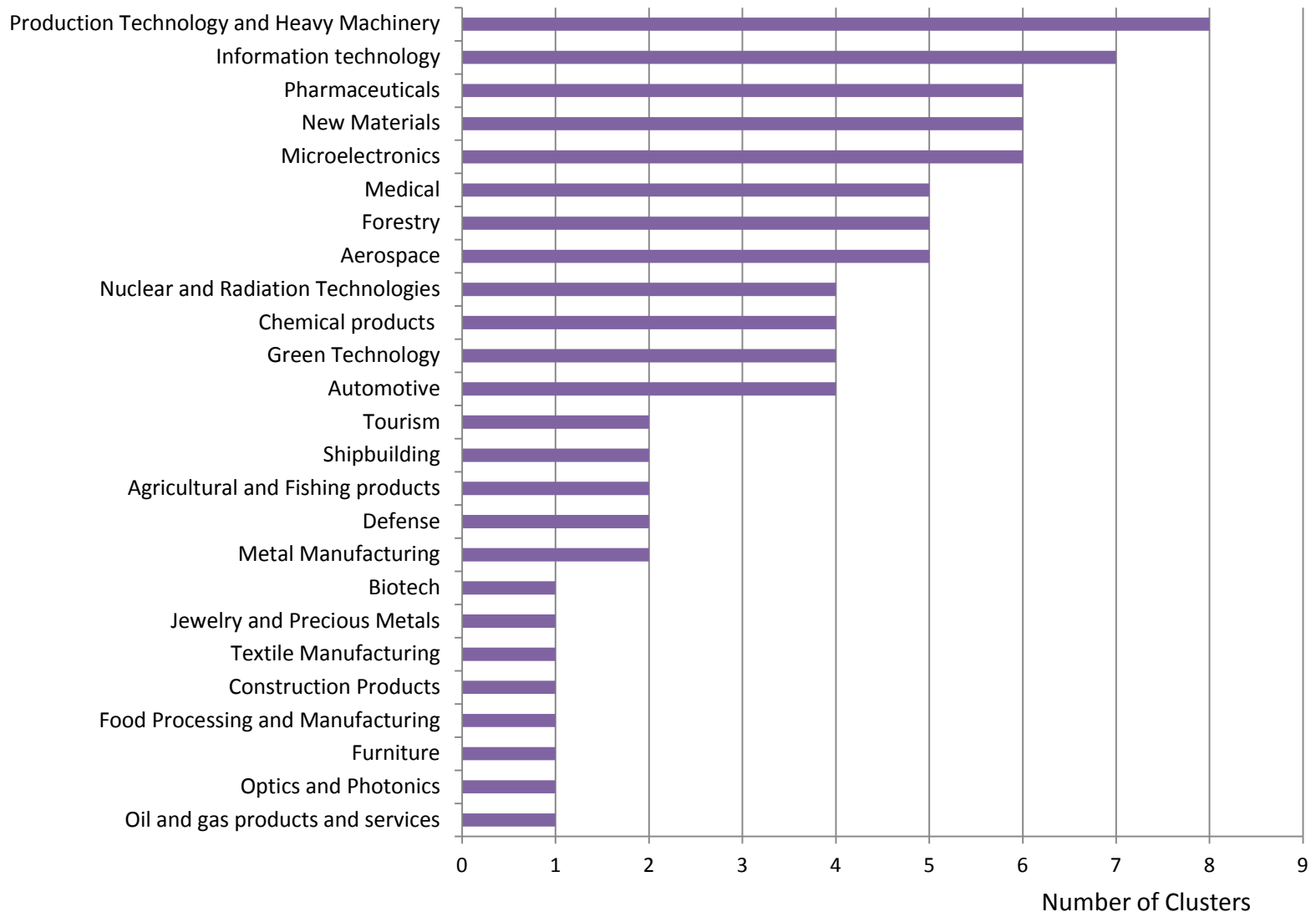
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map.cluster.hse.ru



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



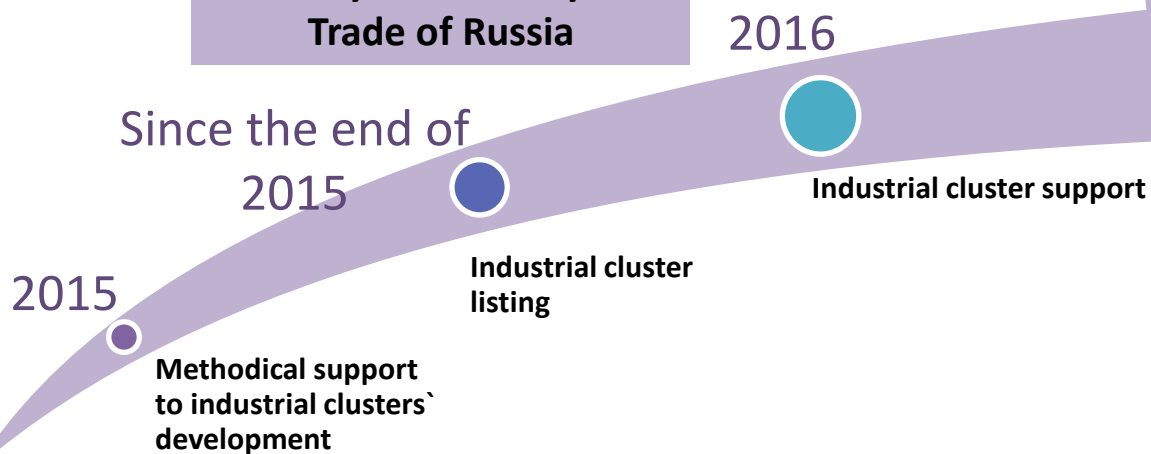


Cluster Policy in Russia: Stepping-up of Efforts

Ministry for Economic Development of Russia



Ministry for Industry and Trade of Russia





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

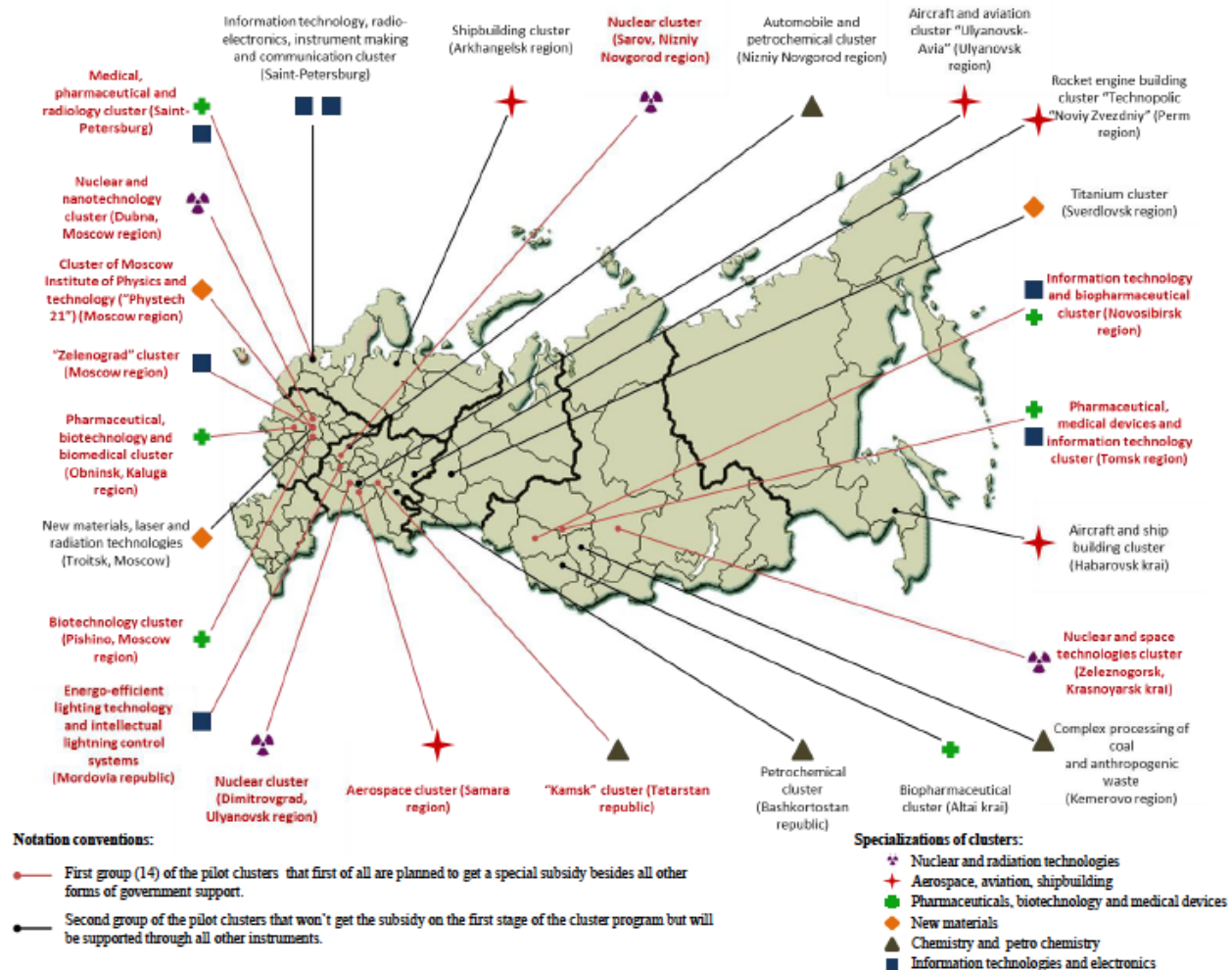
25

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

27

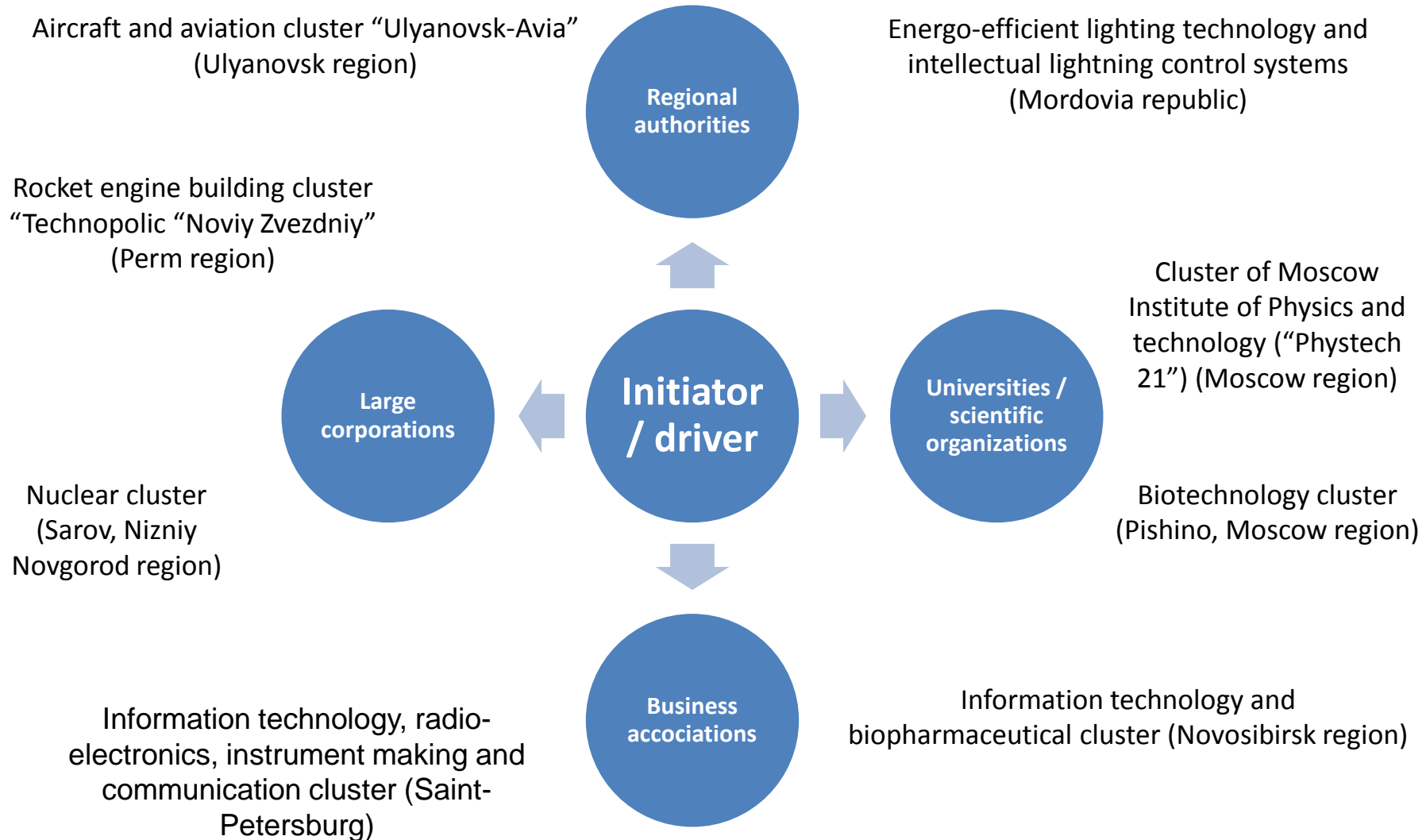
The quantity on pilot innovative clusters at the end of 2015

Map of pilot innovative clusters (25)





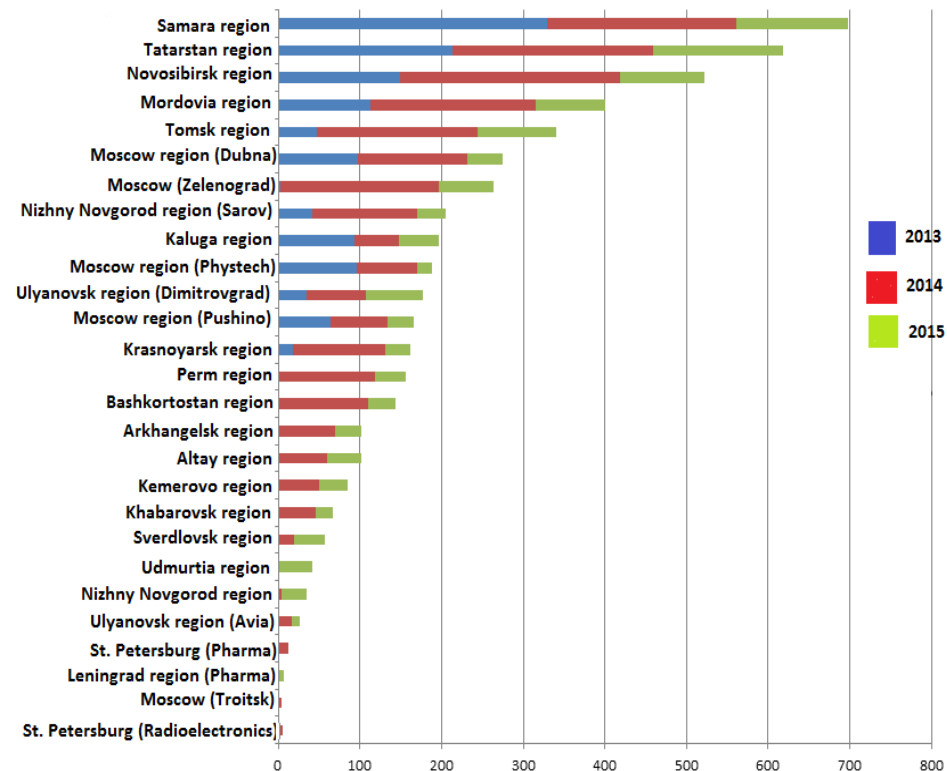
Different Types of Initiators



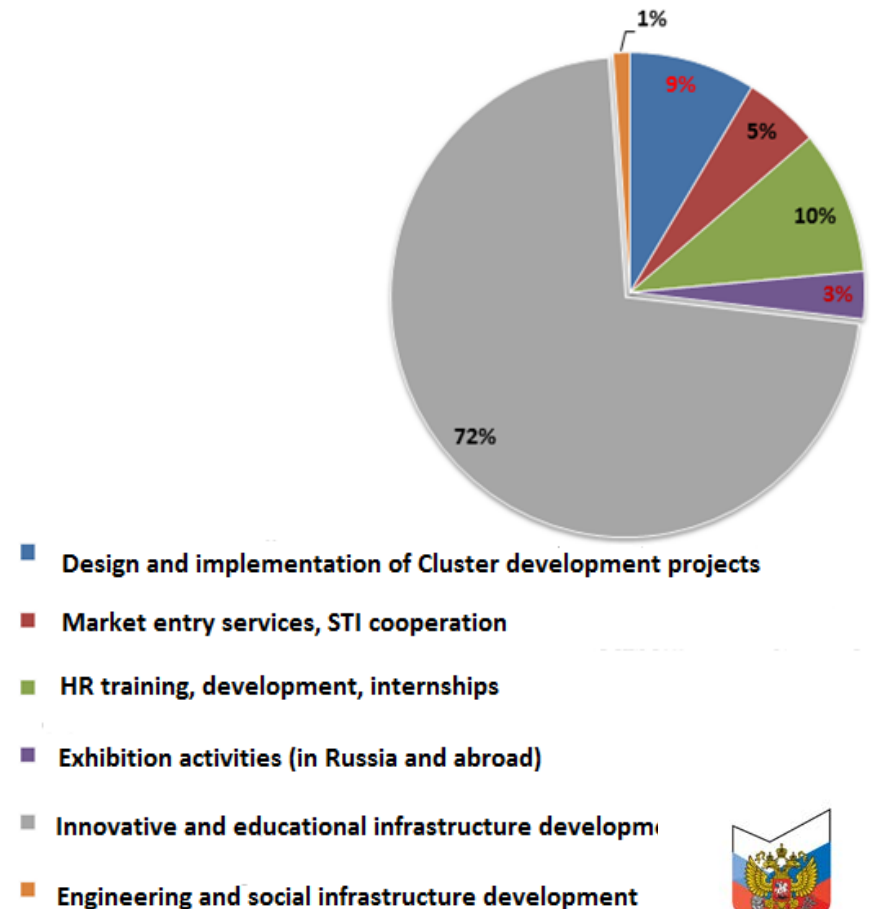


Support Areas of Pilot Innovative Clusters by the Ministry for Economic Development of Russia

Federal subsidy allocation in 2013-2015
by clusters



Federal subsidy allocation in 2013-2015
by costs





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

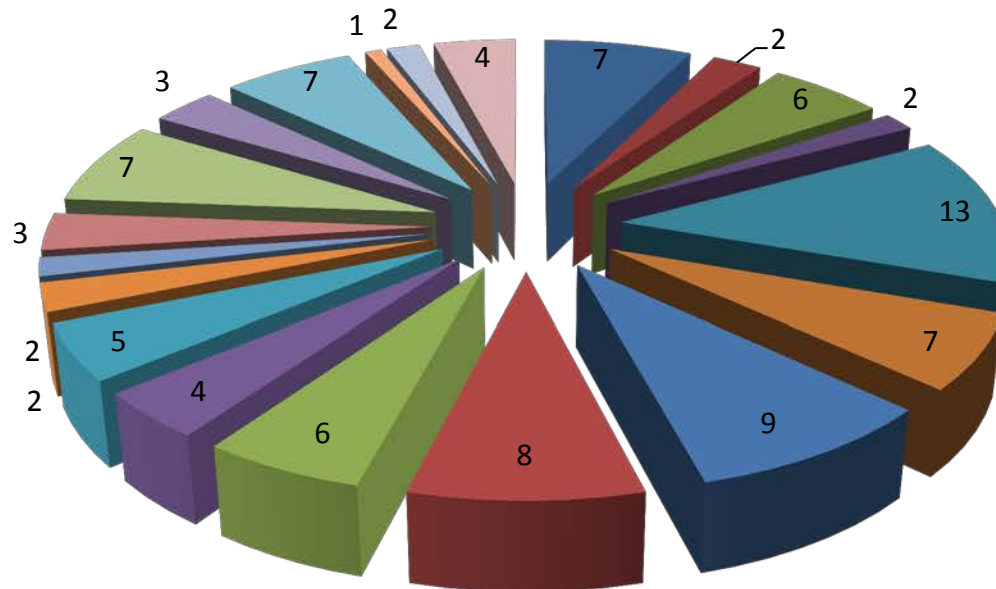
Methodical guidance on industrial cluster establishment



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
- Automotive
- Radioelectronics, optical electronics
- Medical and Pharma
- Machine Tool Manufacturing
- Oil and Gas Machine Manufacturing
- Agricultural Machine Manufacturing
- Forestry
- Construction
- Folk Arts and Crafts

- Shipbuilding
- Transport Machinery
- Chemicals
- Biotech
- Metallurgy
- Power Generation Machinery
- Consumer Goods Industry
- Furniture
- Manufacture of weapons and ammunition
- 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



HSE Russian cluster observatory



Web-site:
cluster.hse.ru

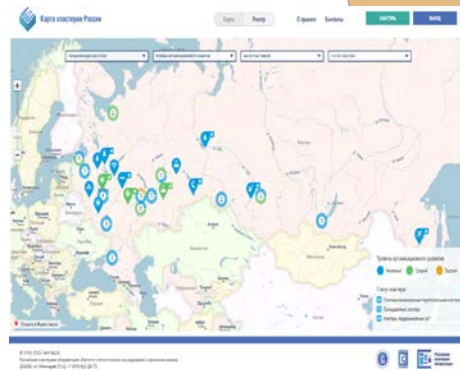


Educational programs

Rating of
innovative
development
of Russian
regions



Reports, reviews,
articles



Russian cluster
mapping

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