



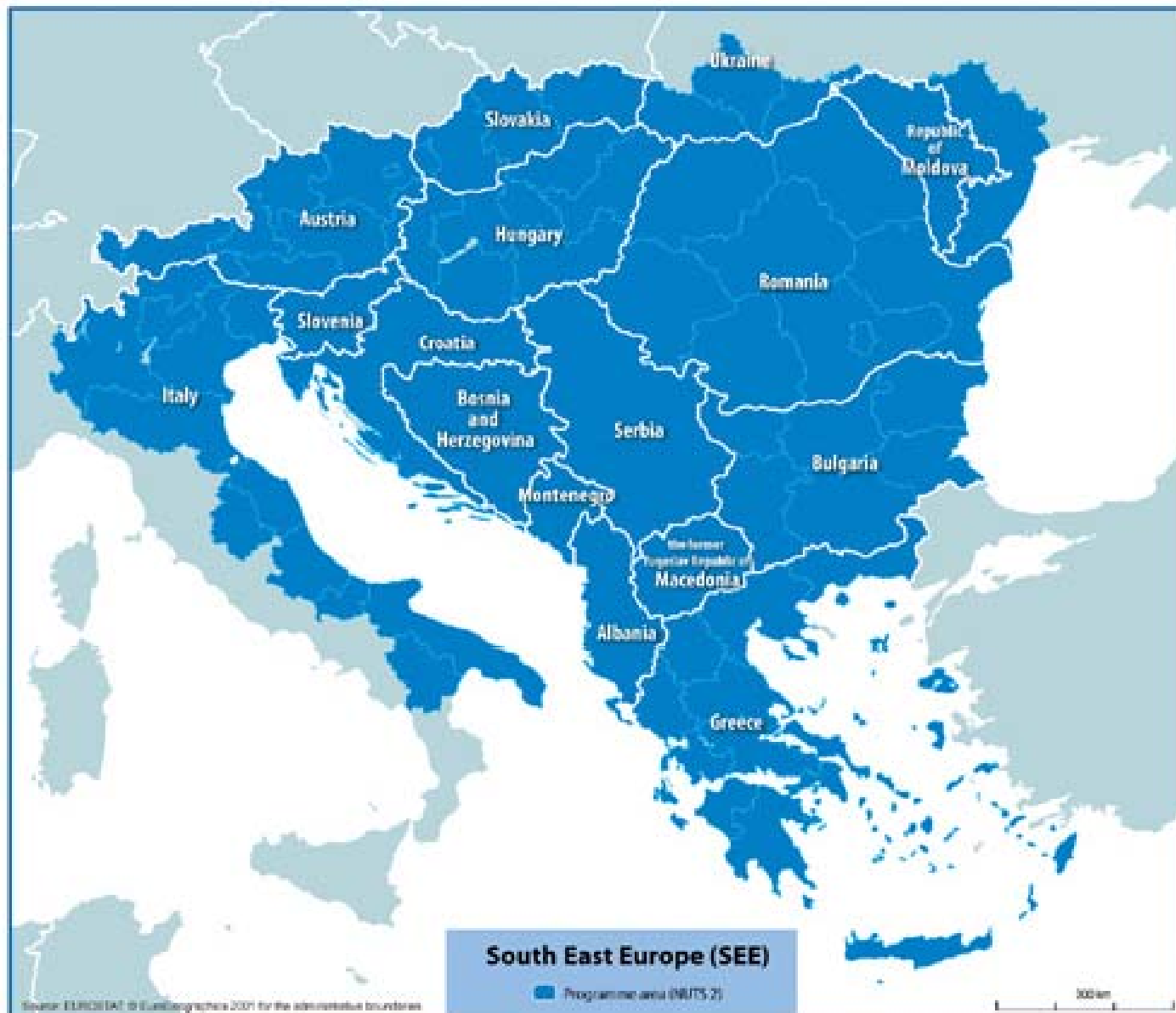
# FOOD INNOVATION CLUSTERING IN THE SOUTH- EAST EUROPE AREA

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## *THE INNO- FOOD SEE PROJECT*



**European Union**  
European Regional Development Fund



# SEE regions- General Characteristics

Older EU member states/ New Member States (accession 2004- 2007)/ Associated Countries

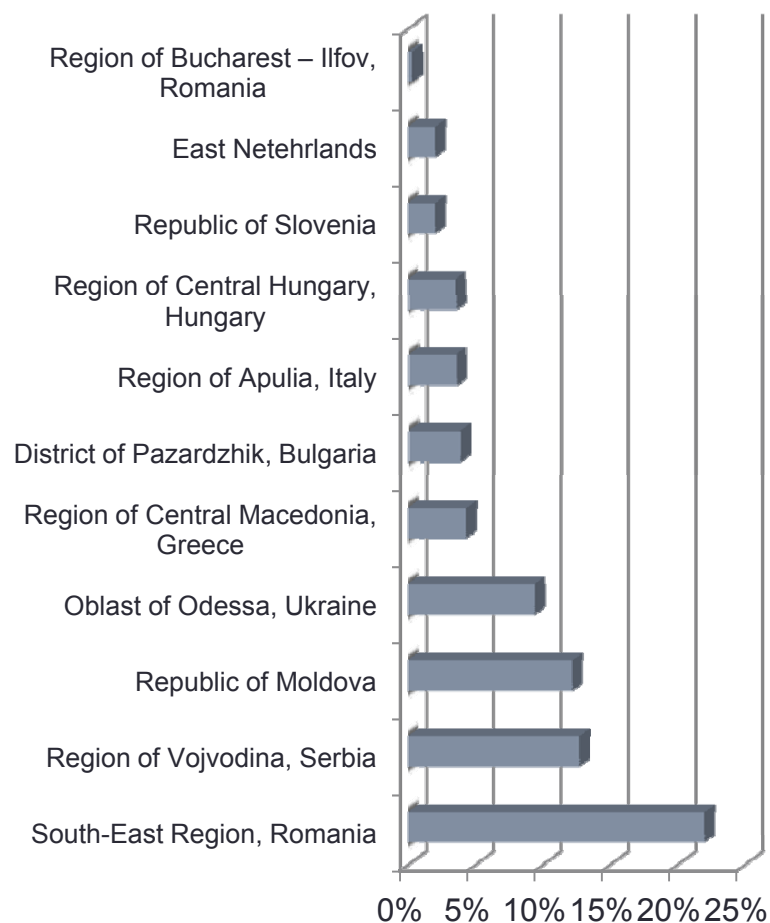
**Similarities and disparities** in the structure of the economy and the efficiency of RTD and business policy

GDP per capita ranges from 1,500€ in Moldova to 17,900€ in C. Macedonia- Greece (EU27 average 23,500 €)

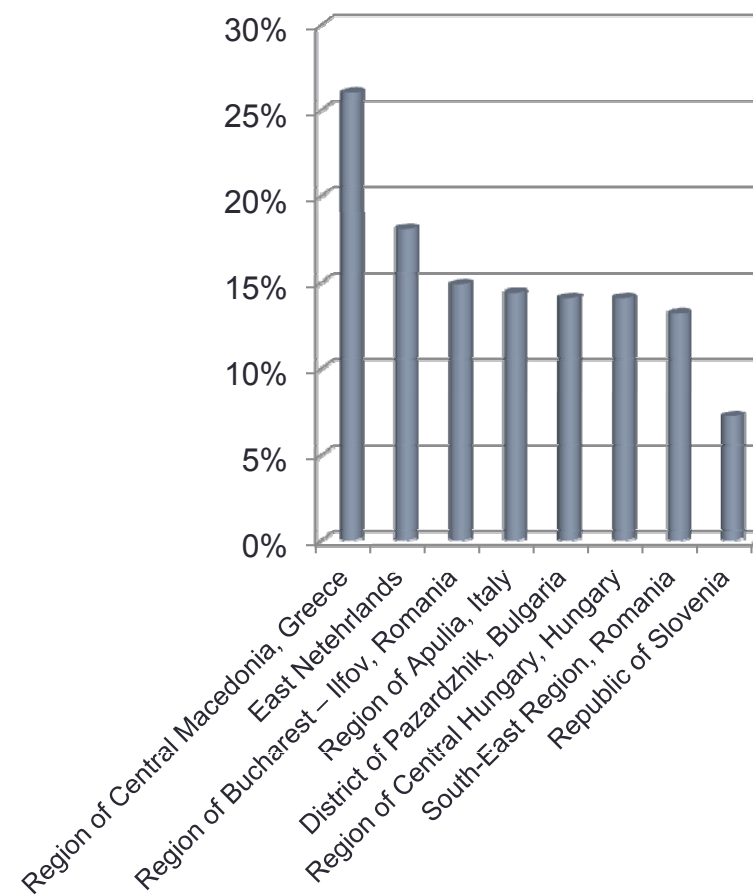
Unemployment ranges from 5.4% (Bucharest- Ilfov) up to 20% in C. Macedonia-Greece and Vojvodina- Serbia

# Agricultural and food industry statistics

## Primary sector GDP share



## Share of employment of the food and beverages industry in manufacturing total



# Agricultural and food industry

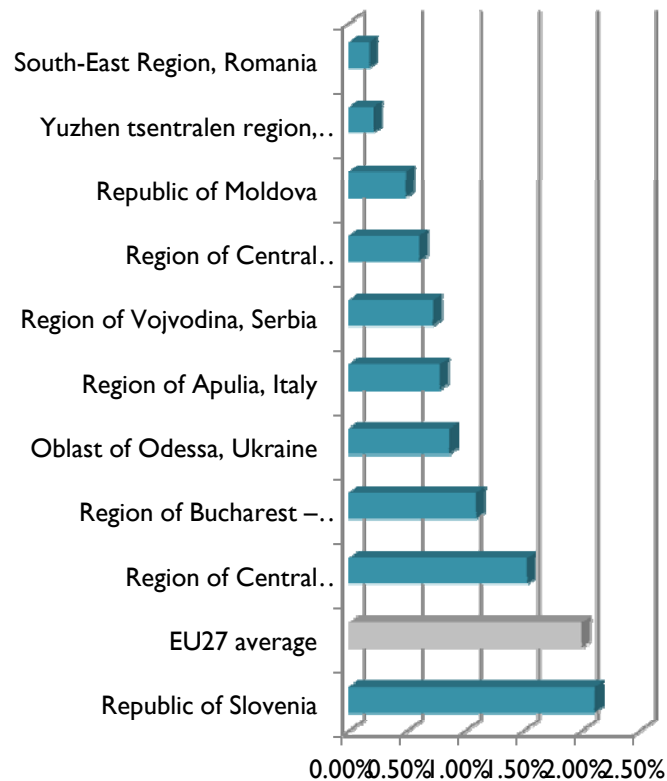
Share of agriculture in total **employment** ranges from 1% (Bucharest- Ilfov) to 28% (Moldova)

**Limited exports** despite the significant share in national GDP

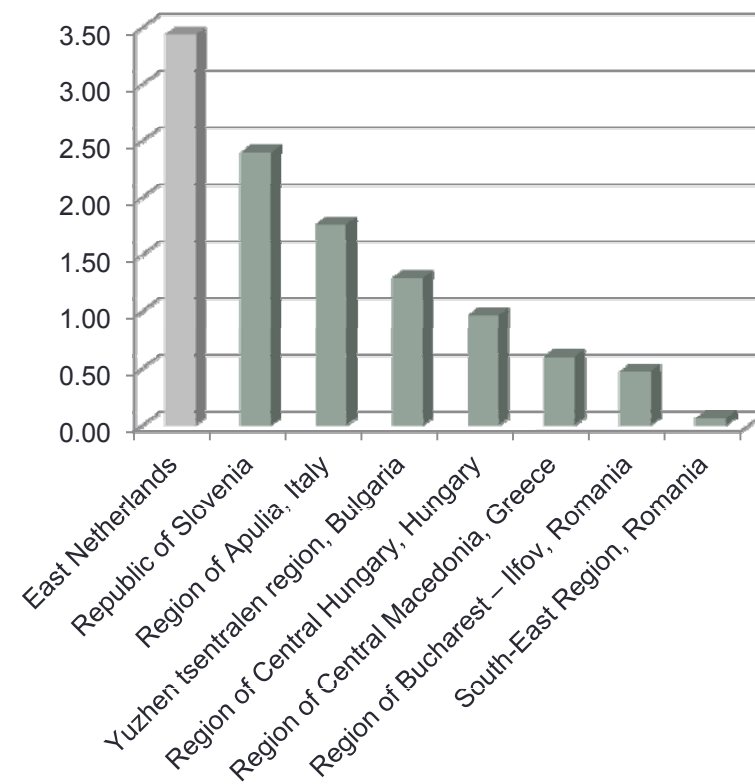
**Specialisation** in food products: fruits, wine, industrial crops, cereals, dairy, meat and animal products

# Research statistics

**Gross domestic  
expenditure on R & D  
(GERD) %**



**Biotechnology patent  
applications to the EPO  
(Per million labour force)**



# Regional Innovation Performance, (RIS 2009)

## Medium- High Innovators

- **Slovenia**

## Average Innovators

- **Central Hungary**

## Medium- Low Innovators

- **Central Macedonia**
- **Puglia**
- **Bucharest – Ilfov**
- **Serbia** (Innovation Union Scoreboard)

## Low Innovators

- **Pazardzhik**
- **South- East Region, Romania**
- **Ukraine** (based on other comparative studies)
- **Modova** (based on other comparative studies)

# Inno- Food SEE Objective

*To set up the appropriate mechanisms that will facilitate the exchange and coordination of innovation approaches and policies for the food sector and to increase awareness on the importance of food innovation for the wider SEE area*





# INNO-FOOD SEE partners

## Partners



Lead Partner

☒ Centre For Research And Technology Hellas – Institute Of Applied Biosciences, (EKETA/INAB) Greece



☒ Federation Of Industries Of Northern Greece, (SWVE) Greece



☒ National Research Council – Institute Of Sciences of Food Production, (CNR/ISPA) Italy



☒ Agricultural University of Plovdiv, (AUP) Bulgaria



☒ Pazardzhik Regional Administration, (OAP) Bulgaria



☒ National Institute Of Research & Development For Food Bioresources, (IBA) Romania



☒ Constanta Chamber Of Commerce, Industry, Shipping And Agriculture, (CCINA) Romania



☒ The Development Agency of Idrija and Cerkno, (ICRA) Slovenia



☒ European Food Chain Parliament-Foodlawment, (EFPF) Hungary



☒ Odessa National Academy of Food Technologies, (ONAFI) Ukraine



☒ Chamber Of Commerce and Industry of The Republic Of Moldova, (CCIRM) Republic of Moldova



☒ Institute For Food Technology, (FINS) Serbia

# Key Activities I

Profiling of 148 food RTD entities and 288 food SMEs

Mapping and assessment of **policies**, for food innovation in each region

**SWOT analysis** for food innovation development and assimilation capacity

# Key Activities II

**Training** of SMEs,  
researchers and  
students (6 workshops  
and 6 seminars)

Feasibility **studies** for  
food innovation support  
**investments**

Regional **plans** for  
AgroFood RTD- 34  
particular measures  
examined

Raising **public  
awareness** on food  
innovation and benefits  
(14 info-days,  
Conference in Bari)

## Key Activities III

Dissemination of project objectives & results (project website, database, brochures, etc.)

Cooperation with other EU projects & initiatives : participation in **Food Cluster Initiative** meetings, links with other projects

Furthering food RTD and innovation cooperation (various proposals submitted in EU programmes)

# Autonomy of Regional RTD policy

- Puglia- IT: **some autonomy** in development of regional RTD policy and implementation of measures
  - *ARTI (research agency) & DARe (food cluster)*
- C. Macedonia- GR: **transition phase** to a more independent decision and implementation system
- Bulgaria, Romania, Slovenia, Hungary: **mostly centralised system**
- Serbia, Moldova & Ukraine: **centralised system**

## Types of RTD policy measures

	Grants for RTD cooperation	Tax and financial incentives for innova- tion	SME support for the recruitment of researchers	Training of researchers	Develop- ment of Innovation Clusters	Develop- ment of business parks and incubators
Region of Central Macedonia, Greece	√	√	√		√	
Region of Apulia, Italy	√	√	√	√	√	
District of Pazardzhik, Bulgaria	√	√	√	√		√
Region of Bucharest – Ilfov and South-East Region, Romania	√	√	√	√		√
Republic of Slovenia	√	√		√		√
Region of Central Hungary, Hungary	√	√	√	√		√
Region of Vojvodina, Serbia	√		√	√		√
Oblast of Odessa, Ukraine	√					√
Republic of Moldova	√			√		√

## Assessment of innovation framework conditions I

**Public investment in knowledge** in the regions is below EU average (with the exception of Slovenia); the relevant financing mechanisms are irregular and problematic;

The **quality of research** is of international standards in some regions (Central Macedonia, Puglia, Slovenia); however food related research is not as much developed and it is more inclined to basic than applied research;



## Assessment of innovation framework conditions II

**Private RTD investments** are low; the **interaction** between knowledge entities and the industry needs to be enhanced;

**Commercialization of research results** as evident from IPR indicators and number of EPO patents is coming short of international standards;

## Assessment of innovation framework conditions III

Highly skilled **personnel in industry** is not sufficient and lifelong learning indicators are falling back;

Significant drawbacks are evident in **Innovation Finance and Market Conditions** (subsidies and tax incentives for R&D, pre-commercial procurement procedures, competition barriers).

*...develop an Action Plan to target the challenges posed by the limitations of the framework conditions...*

## Way forward- Critical success factors for cooperation I

A **clear vision** and **benefit** for everyone involved communicated from the start

All involved parties **committed** and willing to **invest** time and resources

Different levels of autonomy in decision making require **different approach**

## Way forward- Critical success factors for cooperation II

Great benefit from association with **mature international clusters**

**Pilot actions** with **tangible** and early results give **impetus** and provide **incentive** for stakeholders

A **dedicated management body** should coordinate the activities in the long term

# What to Expect from this Conference

- INNO-FOOD Project
- New Territorial Cooperation Programmes for the 2014-2020 period
- National Policies
- Trends in food innovation
- Presentations of Food Related projects
- Presentations of Food Clusters
- Funding Opportunities
- Networking

# Thank you!

