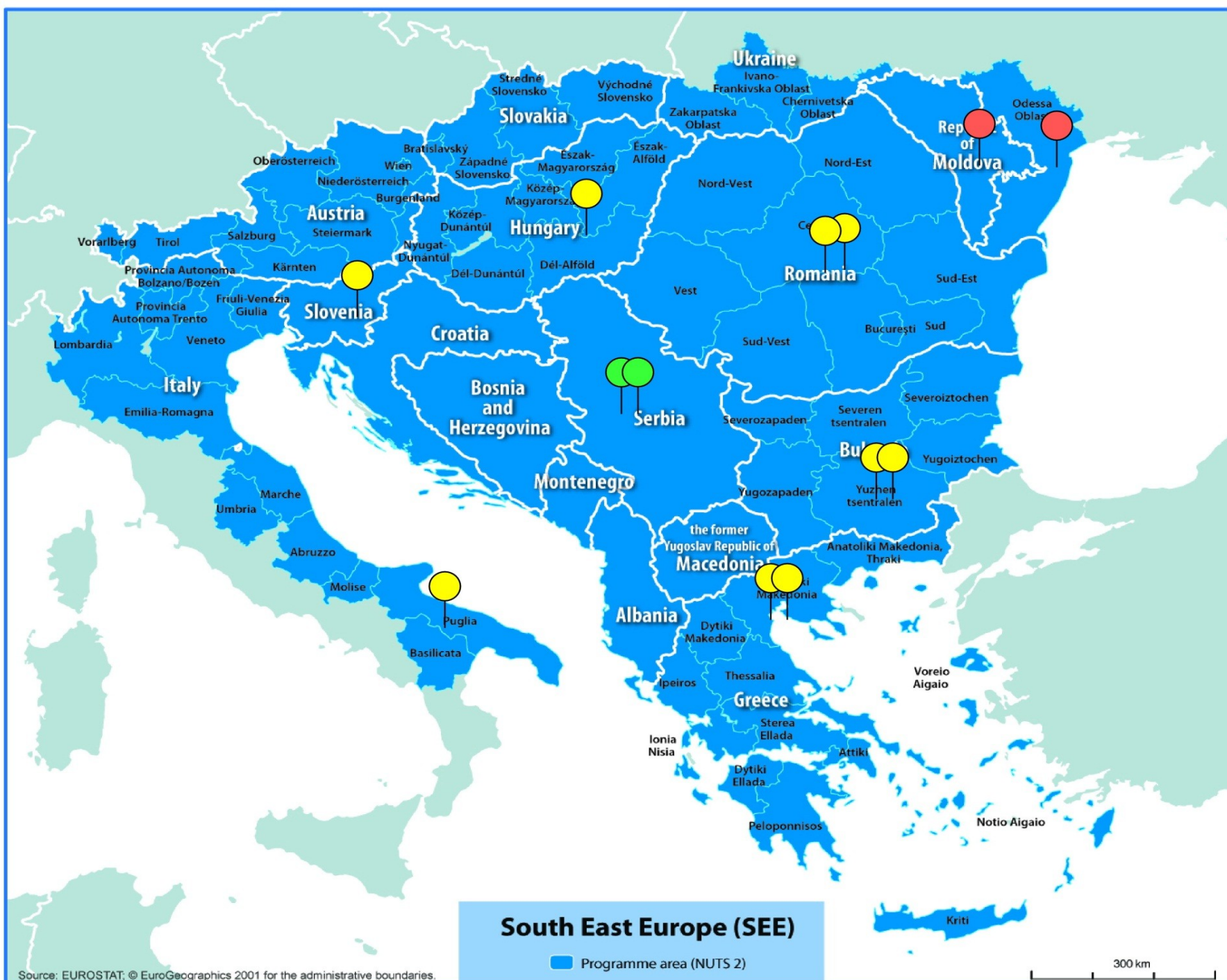


Food Innovation Clustering in the South- East Europe area- The Inno- Food SEE project

Contents

- Introduction- Geographical scope
- Characteristics of food industry, RTD and policy environment in SEE
- Inno- Food SEE objectives
- Activities & Results
- Challenges
- Way forward

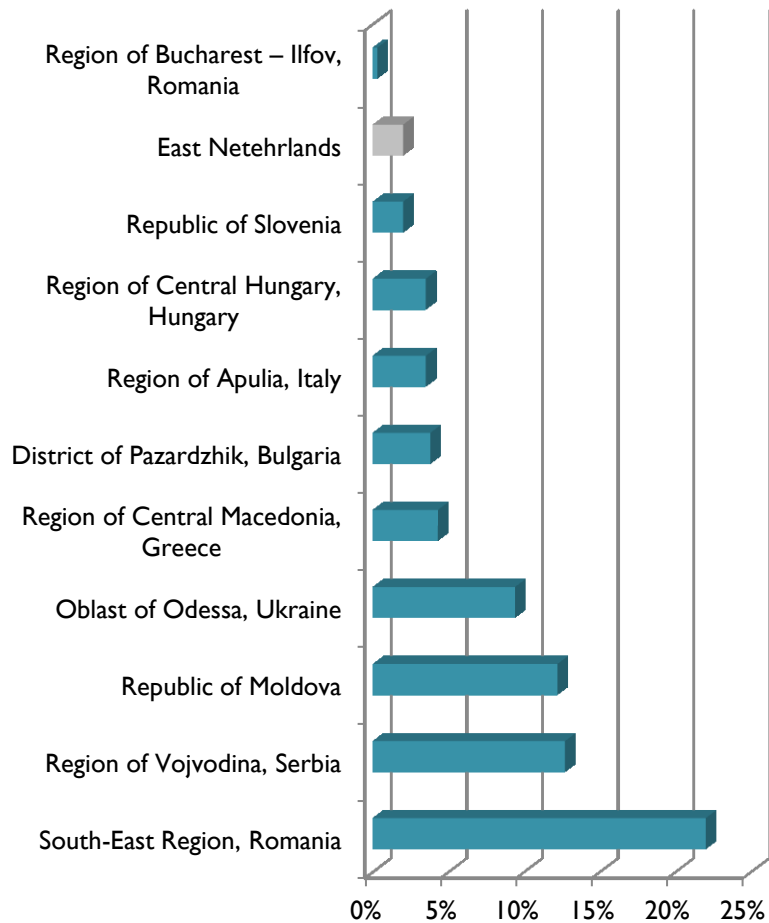


SEE regions- General Characteristics

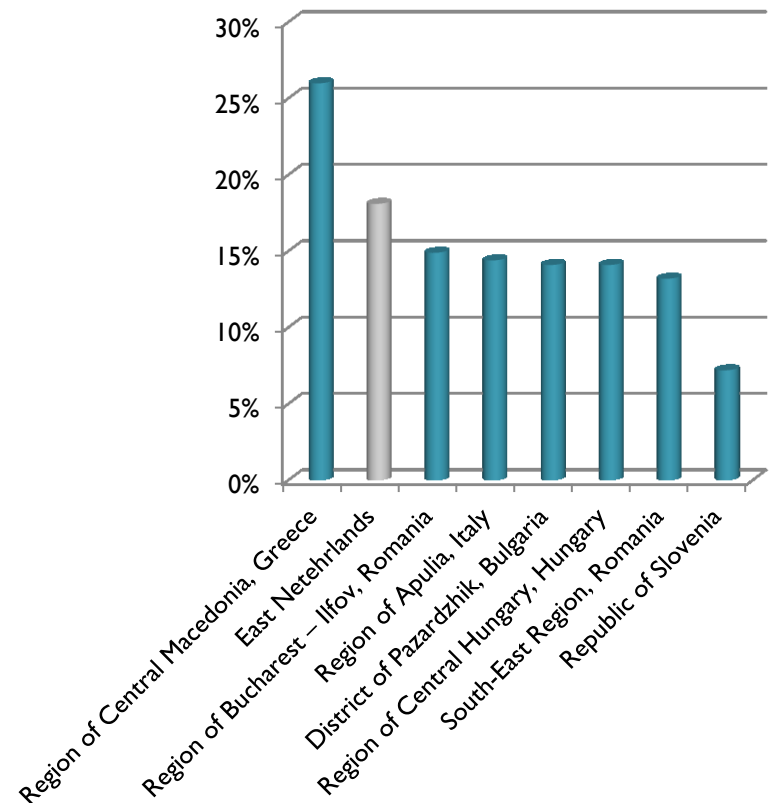
- Older EU member states/ New Member States (accession 2004- 2007)/ Associated Countries
- **Similarities and disparities** in the structure of the economy and the efficiency of RTD and business policy
- **GDP per capita** ranges from 1,500€ in Moldova to 17,900€ in C. Macedonia- Greece (EU27 average 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

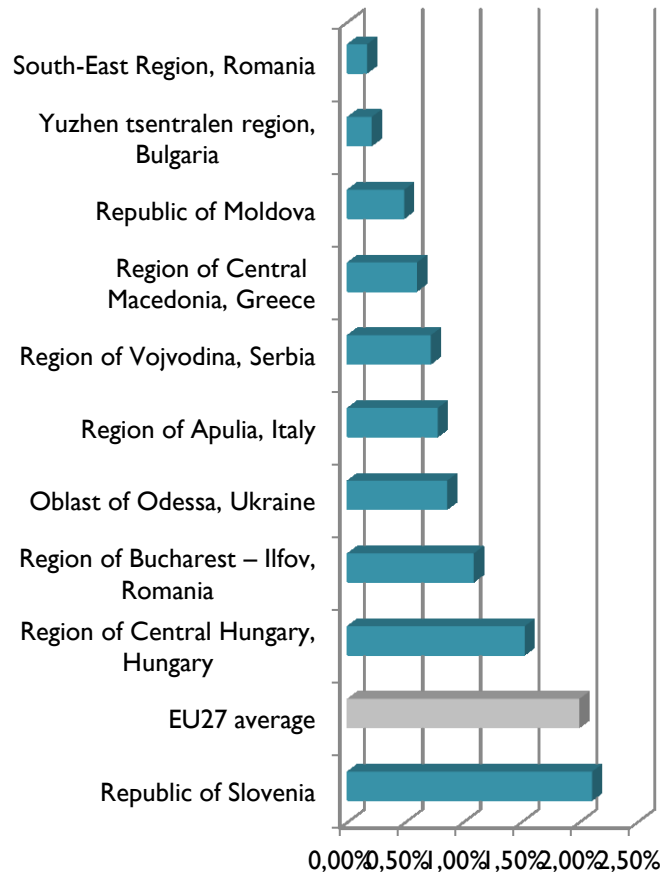


Agricultural and food industry

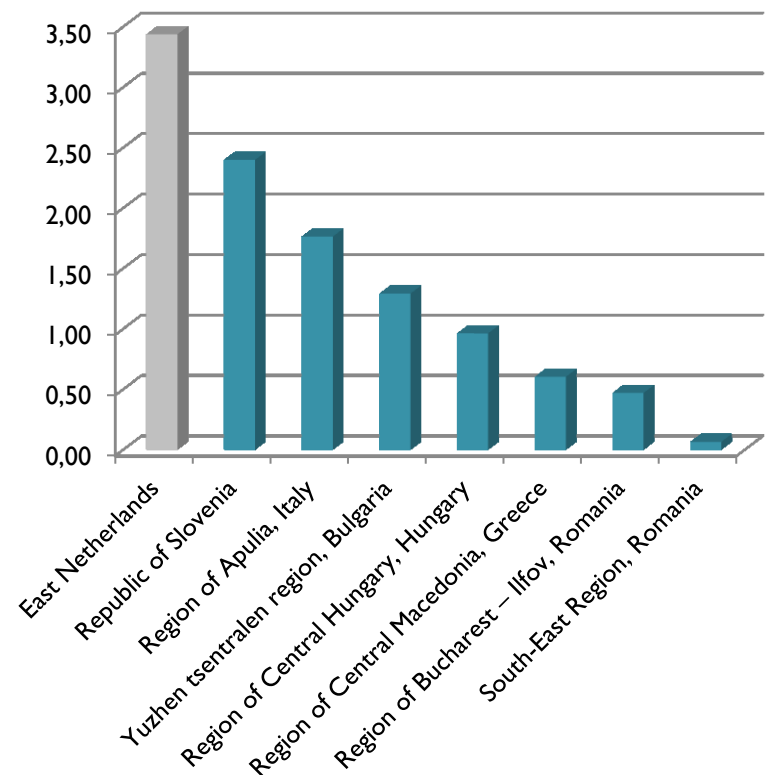
- Share of agriculture in total **employment** ranges from 1% (Bucharest- Ilfov) to 28% (Moldova)
- **Limited exports** despite the significant share in national GDP
- **Specialisation** in food products: fruits, wine, industrial crops, cereals, dairy, meat and animal products

Research statistics

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)

From RAF Regions to Inno- Food SEE



- 3 regions, 12 partners
- FP7- Regions of Knowledge project (2008-2010)
- www.raf-regions.eu

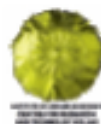


- 9 regions, 12 partners
- Enhanced scope, more focused activities
- SEE Territorial cooperation project (2011-2013)
- www.innofoodsee.eu

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

Partners



Lead Partner

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



☒ Federation Of Industries Of Northern Greece, (SVVE) 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, (ONAF) 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 food RTD
entities and 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

Feasibility **studies** for food
innovation support
investments

Regional **plans** for
AgroFood RTD

Raising **public awareness**
on food innovation and
benefits

Key Activities III

Dissemination of project objectives & results

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

Furthering food RTD and innovation cooperation (proposals submitted in various 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 coopera- tion	Tax and financial incentives for innova- tion	SME support for the recruit- ment 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 the clusters 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 the clusters 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

Thank you!

