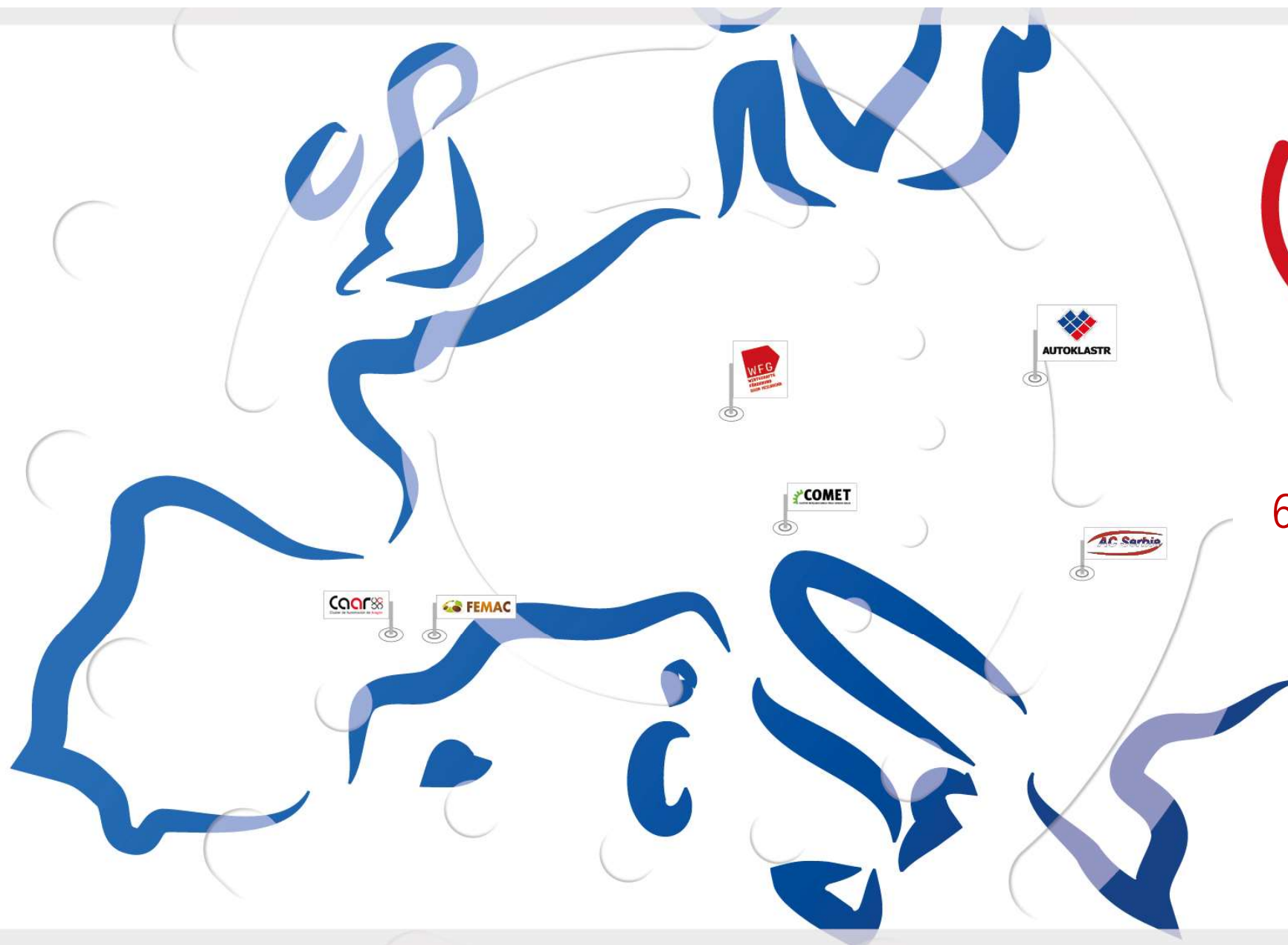


Cluster Performance Analysis

Final results





1 Project
1 Mission
6 Clusters from
5 countries

EVOLUTE website / Social Media



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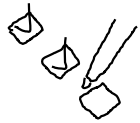
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Analysis of critical success factors



1. Online Questionnaire

Evaluation of relevance for the business and estimated performance of the own company on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good) for every assumed critical success factor (29 Total) from March – April 2022 in all EVOLUTE Clusters.



2. Qualitative Interviews for more detailed answers

From May – August 2022 prioritized factors were elaborated in 5-6 qualitative interviews per cluster.



Quantitative Analysis – Assumed Critical Factors

Internal Factors
1. Development of new business models
2. Increase in efficiency
3. Process innovation
4. Product innovation
5. Organisational transformation
6. Readiness for Cyber Security
7. Digitalisation of processes and products
8. Quality and reliability of processes and products
9. Upskilling / reskilling of workforce
10. Financial resources for investment and modernisation
11. Long-term structural orientation of the company (shareholder structure, generational turnover)

Regional Factors
12. Availability of apprentices
13. Availability of skilled and qualified workforce
14. Availability of digitally skilled workforce
15. Efficient transports and logistics infrastructure
16. Availability of land (for production & offices)
17. Regional innovation ecosystem
18. Public funds to support industrial transformation
19. Regional customer orders
20. Credibility, stability and commitment of the cluster management

Competitive (market) factors
21. Bargaining power of customers
22. Bargaining power of service providers / suppliers
23. Market entry of new competitors
24. Availability of raw materials
25. Replacement of existing products by substitutes or new products
26. Government regulations changing the market situation
27. Industry regulations changing the market situation
28. Cost of energy
29 Impact of climate change

Quantitative Analysis



Summary of Factorgroups

Factorgroup	Relevance	Performance	Performance Gap	Pressure to act
Internal Factors (unweighted)	5,77	4,77	1,00	6,77
External Factors (unweighted)	5,28	4,43	0,84	6,12
Market Factors (unweighted)	5,74	4,27	1,47	7,21
Mean of Means (unweighted)	5,60	4,49	1,11	6,70

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)

Quantitative Analysis



Internal Factors total mean of all EVOLUTE Clusters (n= 183)

Critical Success Factor	Relevance	Performance	Performance Gap	Pressure to act
1. Development of new business models	5,74	4,35	1,39	7,14
2. Increase in efficiency	6,12	5,15	0,97	7,09
3. Process innovation	5,97	5,05	0,92	6,89
4. Product innovation	5,84	4,75	1,09	6,92
5. Organisational transformation	5,30	4,51	0,79	6,09
6. Readiness for Cyber Security	5,88	4,40	1,48	7,36
7. Digitalisation of processes and products	5,99	4,61	1,39	7,38
8. Quality and reliability of processes and products	6,27	5,65	0,62	6,89
9. Upskilling / reskilling of workforce	5,60	4,57	1,03	6,62
10. Financial resources for investment and modernisation	5,48	4,55	0,94	6,42
11. Long-term structural orientation of the company (shareholder structure, generational turnover)	5,32	4,87	0,44	5,76
Mean of means (unweighted)	5,77	4,77	1,00	6,78

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)

Quantitative Analysis



External Factors total mean of all EVOLUTE Clusters (n= 181)

Critical Success Factor	Relevance	Performance	Performance Gap	Pressure to act
12. Availability of apprentices	5,05	4,08	0,98	6,03
13. Availability of skilled and qualified workforce	6,18	4,20	1,98	8,17
14. Availability of digitally skilled workforce	5,89	3,78	2,11	8,01
15. Efficient transports and logistics infrastructure	5,41	4,17	1,24	6,64
16. Availability of land (for production & offices)	3,83	4,06	-0,23	3,60
17. Regional innovation ecosystem	5,09	4,94	0,15	5,24
18. Public funds to support industrial transformation	5,26	4,38	0,88	6,14
19. Regional customer orders	5,30	4,80	0,50	5,80
20. Credibility, stability and commitment of the cluster management	5,46	5,46	0,00	5,47
Mean of means (unweighted)	5,28	4,43	0,84	6,12

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)

Quantitative Analysis



Market Factors total mean of all EVOLUTE Clusters (n= 178)













Critical Success Factor	Relevance	Performance	Performance Gap	Pressure to act
21. Bargaining power of customers	5,88	4,37	1,51	7,39
22. Bargaining power of service providers / suppliers	5,70	4,48	1,23	6,93
23. Market entry of new competitors	5,72	4,48	1,24	6,96
24. Availability of raw materials	6,11	3,98	2,13	8,24
25. Replacement of existing products by substitutes or new products	5,75	4,54	1,21	6,96
26. Government regulations changing the market situation (taxes, tax exemptions, grants, cost for decarbonisation, corporate social responsibility reporting directive)	5,58	4,37	1,21	6,79
27. Industry regulations changing the market situation (environment, social governance due diligence, cost for decarbonisation)	5,40	4,38	1,02	6,42
28. Cost of energy	6,32	3,66	2,66	8,98
29 Impact of climate change	5,17	4,14	1,03	6,20
Mean of means (unweighted)	5,74	4,27	1,47	7,21

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)

Quantitative Analysis – Internal Factors

Internal Factors combined per cluster						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,71	4,76	0,95	6,66
	CZ, AUTOKLASTR (n=9)		5,77	4,24	1,53	7,29
	ES, CAAR (n=27)		5,83	5,00	0,83	6,66
	IT, COMET (n=25)		5,73	4,16	1,58	7,31
	DE, WFG (n=86)		5,74	4,89	0,85	6,59
	ES, FEMAC (n=18)		5,48	4,96	1,02	6,50
Mean of means (weighted by n)			5,77	4,77	1,00	6,78

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

1. Development of new business models

Cluster	Relevance	Performance	Performance Gap	Pressure to act
 RS, AC Serbia (n=18) 	5,78	4,83	0,95	6,72
 CZ, AUTOKLASTR (n=9) 	4,89	4,11	0,78	5,67
 ES, CAAR (n=27) 	5,78	4,82	0,96	6,74
 IT, COMET (n=25) 	5,52	2,92	2,60	8,12
 DE, WFG (n=86) 	5,84	4,40	1,44	7,28
 ES, FEMAC (n=18) 	5,94	5,06	0,89	6,83
Mean of means (weighted by n)	5,77	4,77	1,00	6,78

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

2. Increase in Efficiency

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		6,00	5,44	0,56	0,56
	CZ, AUTOKLASTR (n=9)		6,33	4,67	1,67	1,67
	ES, CAAR (n=27)		6,26	5,19	1,07	1,07
	IT, COMET (n=25)		6,44	5,36	1,08	1,08
	DE, WFG (n=86)		5,93	5,06	0,87	0,87
	ES, FEMAC (n=18)		6,39	5,17	1,22	1,22
Mean of means (weighted by n)			5,77	4,77	1,00	6,78













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

3. Process innovation						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		6,00	4,50	1,50	7,50
	CZ, AUTOKLASTR (n=9)		6,11	4,11	2,00	8,11
	ES, CAAR (n=27)		6,19	5,41	0,78	6,96
	IT, COMET (n=25)		6,16	5,00	1,16	7,32
	DE, WFG (n=86)		5,76	5,11	0,65	6,41
	ES, FEMAC (n=18)		6,28	5,33	0,95	7,22
Mean of means (weighted by n)			5,96	5,04	0,92	6,89













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

4. Product innovation						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,72	4,71	1,02	6,74
	CZ, AUTOKLASTR (n=9)		5,78	4,67	1,11	6,89
	ES, CAAR (n=27)		5,93	5,15	0,78	6,70
	IT, COMET (n=25)		5,04	3,50	1,54	6,58
	DE, WFG (n=86)		5,89	4,69	1,20	7,09
	ES, FEMAC (n=18)		6,67	6,17	0,50	7,17
Mean of means (weighted by n)			5,84	4,75	1,09	6,92

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance













Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors



5. Organisational transformation

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,44	4,94	0,50	5,94
	CZ, AUTOKLASTR (n=9)		4,89	4,33	0,56	5,45
	ES, CAAR (n=27)		5,30	5,15	0,15	5,44
	IT, COMET (n=25)		5,40	3,28	2,12	7,52
	DE, WFG (n=86)		5,15	4,45	0,70	5,85
	ES, FEMAC (n=18)		5,94	5,17	0,78	6,72
Mean of means (weighted by n)			5,30	4,51	0,79	6,09













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

6. Readiness for Cyber Security						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,78	4,33	1,45	7,22
	CZ, AUTOKLASTR (n=9)		5,89	4,67	1,22	7,11
	ES, CAAR (n=27)		5,52	4,93	0,59	6,11
	IT, COMET (n=25)		5,88	2,92	2,96	8,84
	DE, WFG (n=86)		6,11	4,79	1,32	7,42
	ES, FEMAC (n=18)		5,44	3,72	1,72	7,17
Mean of means (weighted by n)			5,88	4,40	1,48	7,36

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

7. Digitalization of processes and products

Cluster	Relevance	Performance	Performance Gap	Pressure to act
 RS, AC Serbia (n=18) 	5,77	4,39	1,38	7,14
 CZ, AUTOKLASTR (n=9) 	6,33	4,00	2,33	8,67
 ES, CAAR (n=27) 	6,19	5,15	1,04	7,22
 IT, COMET (n=25) 	5,84	3,80	2,04	7,88
 DE, WFG (n=86) 	5,95	4,81	1,14	7,09
 ES, FEMAC (n=18) 	6,17	4,44	1,72	7,89
Mean of means (weighted by n)	5,99	4,61	1,39	7,38

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

8. Quality and reliability of processes and products

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		6,19	5,78	0,41	6,60
	CZ, AUTOKLASTR (n=9)		6,56	4,56	2,00	8,56
	ES, CAAR (n=27)		6,50	5,52	0,98	7,48
	IT, COMET (n=25)		5,64	5,52	0,12	5,76
	DE, WFG (n=86)		6,41	5,97	0,44	6,85
	ES, FEMAC (n=18)		6,06	4,94	1,12	7,17
Mean of means (weighted by n)			6,27	5,65	0,62	6,89

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

9. Upskilling and reskilling of workforce

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,94	4,56	1,38	7,32
	CZ, AUTOKLASTR (n=9)		6,00	3,78	2,22	8,22
	ES, CAAR (n=27)		5,69	4,82	0,88	6,57
	IT, COMET (n=25)		6,84	4,28	2,56	9,40
	DE, WFG (n=86)		5,08	4,65	0,43	5,52
	ES, FEMAC (n=18)		5,71	4,67	1,04	6,75
Mean of means (weighted by n)			5,60	4,57	1,03	6,62

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

10. Financial resources for investment and modernisation

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,19	4,41	0,78	5,96
	CZ, AUTOKLASTR (n=9)		6,00	3,89	2,11	8,11
	ES, CAAR (n=27)		6,07	4,41	1,67	7,74
	IT, COMET (n=25)		4,53	5,26	-0,73	3,80
	DE, WFG (n=86)		5,44	4,53	0,91	6,36
	ES, FEMAC (n=18)		5,71	4,39	1,32	7,02
Mean of means (weighted by n)			5,48	4,55	0,94	6,42

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

11. Long-term structural orientation of the company

Cluster	Relevance	Performance	Performance Gap	Pressure to act
 RS, AC Serbia (n=18) 	5,00	4,41	0,59	5,59
 CZ, AUTOKLASTR (n=9) 	4,67	3,89	0,78	5,45
 ES, CAAR (n=27) 	4,73	4,52	0,21	4,94
 IT, COMET (n=25) 	5,78	3,87	1,91	7,70
 DE, WFG (n=86) 	5,57	5,34	0,23	5,80
 ES, FEMAC (n=18) 	4,94	5,47	-0,53	4,42
Mean of means (weighted by n)	5,32	4,87	0,44	5,76













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

External Factors Combined					
Cluster	Relevance	Performance	Performance Gap	Pressure to act	
 RS, AC Serbia (n=18) 	5,40	4,38	1,02	6,41	
 CZ, AUTOKLASTR (n=9) 	5,16	4,01	1,15	6,31	
 ES, CAAR (n=27) 	5,41	4,66	0,75	6,16	
 IT, COMET (n=25) 	4,64	3,61	1,03	5,68	
 DE, WFG (n=86) 	5,33	4,60	0,72	6,05	
 ES, FEMAC (n=18) 	5,57	4,55	1,02	6,59	
Mean of means (weighted by n)	5,28	4,43	0,84	6,12	

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

12. Availability of apprentices













Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,00	4,41	0,59	5,59
	CZ, AUTOKLASTR (n=9)		4,67	3,89	0,78	5,45
	ES, CAAR (n=27)		4,73	4,52	0,21	4,94
	IT, COMET (n=25)		5,78	3,87	1,91	7,70
	DE, WFG (n=86)		5,57	5,34	0,23	5,80
	ES, FEMAC (n=18)		4,94	5,47	-0,53	4,42
Mean of means (weighted by n)			5,05	4,08	0,98	6,03

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)

Quantitative Analysis – Internal Factors

13. Availability of skilled and qualified workforce						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,77	4,17	1,60	7,36
	CZ, AUTOKLASTR (n=9)		6,56	2,89	3,67	10,22
	ES, CAAR (n=27)		6,19	5,04	1,16	7,35
	IT, COMET (n=25)		6,44	3,80	2,64	9,08
	DE, WFG (n=86)		6,11	4,11	2,00	8,10
	ES, FEMAC (n=18)		6,39	4,61	1,78	8,17
Mean of means (weighted by n)			6,18	4,20	1,98	8,17

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

14. Availability of digitally skilled workforce

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,65	3,83	1,81	7,46
	CZ, AUTOKLASTR (n=9)		5,78	3,00	2,78	8,56
	ES, CAAR (n=27)		5,42	4,67	0,76	6,18
	IT, COMET (n=25)		6,04	3,32	2,72	8,76
	DE, WFG (n=86)		6,06	3,61	2,45	8,51
	ES, FEMAC (n=18)		5,89	4,22	1,67	7,56
Mean of means (weighted by n)			5,89	3,78	2,11	8,01













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

15. Efficient transports and logistics infrastructure						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,77	4,41	1,35	7,12
	CZ, AUTOKLASTR (n=9)		4,56	4,78	-0,22	4,33
	ES, CAAR (n=27)		4,96	4,48	0,48	5,44
	IT, COMET (n=25)		5,00	2,96	2,04	7,04
	DE, WFG (n=86)		5,62	4,22	1,40	7,02
	ES, FEMAC (n=18)		5,67	4,56	1,10	6,77
Mean of means (weighted by n)			5,41	4,17	1,24	6,64

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

16. Availability of land (for production and offices)

Cluster	Relevance	Performance	Performance Gap	Pressure to act
 RS, AC Serbia (n=18) 	4,29	4,41	-0,12	4,18
 CZ, AUTOKLASTR (n=9) 	5,17	3,88	1,29	6,46
 ES, CAAR (n=27) 	4,04	4,12	-0,08	3,95
 IT, COMET (n=25) 	2,26	2,31	-0,04	2,22
 DE, WFG (n=86) 	3,69	4,23	-0,54	3,16
 ES, FEMAC (n=18) 	5,00	4,31	0,69	5,69
Mean of means (weighted by n)	3,83	4,06	-0,23	3,60













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

17. Regional innovation ecosystem						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,29	4,35	0,94	6,24
	CZ, AUTOKLASTR (n=9)		4,67	4,56	0,11	4,78
	ES, CAAR (n=27)		5,23	4,30	0,94	6,17
	IT, COMET (n=25)		3,22	3,54	-0,33	2,89
	DE, WFG (n=86)		5,47	5,75	-0,28	5,19
	ES, FEMAC (n=18)		5,56	4,89	0,67	6,22
Mean of means (weighted by n)			5,09	4,94	0,15	5,24

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

18. Public funds to support industrial transformation

Cluster	Relevance	Performance	Performance Gap	Pressure to act
 RS, AC Serbia (n=18) 	5,83	4,35	1,48	7,31
 CZ, AUTOKLASTR (n=9) 	5,11	4,11	1,00	6,11
 ES, CAAR (n=27) 	6,19	4,74	1,45	7,64
 IT, COMET (n=25) 	4,08	4,12	-0,04	4,05
 DE, WFG (n=86) 	5,06	4,38	0,68	5,74
 ES, FEMAC (n=18) 	5,89	4,33	1,56	7,45
Mean of means (weighted by n)	5,26	4,38	0,88	6,14













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

19. Regional customer orders						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,39	4,72	0,67	6,06
	CZ, AUTOKLASTR (n=9)		4,43	3,63	0,80	5,23
	ES, CAAR (n=27)		5,67	4,41	1,26	6,93
	IT, COMET (n=25)		4,75	4,08	0,67	5,42
	DE, WFG (n=86)		5,48	5,34	0,15	5,63
	ES, FEMAC (n=18)		4,89	4,50	0,39	5,28
Mean of means (weighted by n)			5,30	4,80	0,50	5,80

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

20. Credibility, stability and commitment of the cluster management

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,35	4,94	0,41	5,77
	CZ, AUTOKLASTR (n=9)		5,00	5,22	-0,22	4,78
	ES, CAAR (n=27)		5,85	5,59	0,25	6,10
	IT, COMET (n=25)		4,88	5,00	-0,12	4,76
	DE, WFG (n=86)		5,55	5,68	-0,13	5,42
	ES, FEMAC (n=18)		5,67	5,56	0,11	5,78
Mean of means (weighted by n)			5,46	5,46	0,00	5,47













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

Market Factors Combined						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,58	4,79	0,79	6,37
	CZ, AUTOKLASTR (n=9)		5,85	3,43	2,41	8,26
	ES, CAAR (n=27)		5,93	4,76	1,16	7,09
	IT, COMET (n=25)		5,76	3,62	2,14	7,89
	DE, WFG (n=86)		5,62	4,16	1,46	7,07
	ES, FEMAC (n=18)		6,08	4,77	1,31	7,39
Mean of means (weighted by n)			5,74	4,27	1,47	7,21













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

21. Bargaining power of customers						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,06	4,71	0,35	5,41
	CZ, AUTOKLASTR (n=9)		6,63	4,13	2,50	9,13
	ES, CAAR (n=27)		6,26	4,70	1,56	7,81
	IT, COMET (n=25)		5,68	2,52	3,16	8,84
	DE, WFG (n=86)		5,82	4,55	1,27	7,09
	ES, FEMAC (n=18)		6,33	5,44	0,89	7,22
Mean of means (weighted by n)			5,88	4,37	1,51	7,39

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

22. Bargaining power of service providers & suppliers

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,41	4,65	0,77	6,18
	CZ, AUTOKLASTR (n=9)		6,13	4,13	2,00	8,13
	ES, CAAR (n=27)		5,63	4,89	0,75	6,38
	IT, COMET (n=25)		5,68	2,60	3,08	8,76
	DE, WFG (n=86)		5,64	4,73	0,91	6,55
	ES, FEMAC (n=18)		6,22	5,33	0,89	7,11
Mean of means (weighted by n)			5,70	4,48	1,23	6,93

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

23. Market entry of new competitors

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,59	5,00	0,59	6,18
	CZ, AUTOKLASTR (n=9)		5,13	3,38	1,75	6,88
	ES, CAAR (n=27)		5,93	4,70	1,22	7,15
	IT, COMET (n=25)		5,84	3,56	2,28	8,12
	DE, WFG (n=86)		5,56	4,46	1,10	6,67
	ES, FEMAC (n=18)		6,33	5,50	0,83	7,17
Mean of means (weighted by n)			5,72	4,48	1,24	6,96

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

24. Availability of raw material

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,75	4,50	1,25	7,00
	CZ, AUTOKLASTR (n=9)		6,50	3,25	3,25	9,75
	ES, CAAR (n=27)		5,96	4,73	1,23	7,19
	IT, COMET (n=25)		5,88	3,44	2,44	8,32
	DE, WFG (n=86)		6,23	3,80	2,44	8,67
	ES, FEMAC (n=18)		6,22	4,28	1,94	8,17
Mean of means (weighted by n)			6,11	3,98	2,13	8,24

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)













Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

25. Replacement of existing products by substitutes or new products

Cluster	Relevance	Performance	Performance Gap	Pressure to act
 RS, AC Serbia (n=18) 	5,50	4,94	0,56	6,06
 CZ, AUTOKLASTR (n=9) 	5,63	3,63	2,00	7,63
 ES, CAAR (n=27) 	5,58	4,70	0,87	6,45
 IT, COMET (n=25) 	6,42	4,92	1,50	7,91
 DE, WFG (n=86) 	5,64	4,45	1,19	6,83
 ES, FEMAC (n=18) 	5,89	4,22	1,67	7,56
Mean of means (weighted by n)	5,75	4,54	1,21	6,96













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)

Quantitative Analysis – Internal Factors

26. Government regulations changing the market situation

Cluster	Relevance	Performance	Performance Gap	Pressure to act
 RS, AC Serbia (n=18) 	5,59	4,94	0,65	6,24
 CZ, AUTOKLASTR (n=9) 	5,88	3,43	2,45	8,32
 ES, CAAR (n=27) 	6,19	4,85	1,33	7,52
 IT, COMET (n=25) 	6,04	3,84	2,20	8,24
 DE, WFG (n=86) 	5,16	4,25	0,91	6,07
 ES, FEMAC (n=18) 	5,83	4,78	1,06	6,89
Mean of means (weighted by n)	5,58	4,37	1,21	6,79













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)

Quantitative Analysis – Internal Factors

27. Industry regulations changing the market situation

Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,41	4,88	0,53	5,94
	CZ, AUTOKLASTR (n=9)		5,75	3,71	2,04	7,79
	ES, CAAR (n=27)		5,93	4,74	1,19	7,11
	IT, COMET (n=25)		5,54	3,84	1,70	7,24
	DE, WFG (n=86)		5,04	4,29	0,75	5,78
	ES, FEMAC (n=18)		5,89	4,72	1,17	7,06
Mean of means (weighted by n)			5,40	4,38	1,02	6,42













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

28. Cost of energy						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		6,18	4,82	1,35	7,53
	CZ, AUTOKLASTR (n=9)		6,50	2,13	4,38	10,88
	ES, CAAR (n=27)		6,44	4,82	1,63	8,07
	IT, COMET (n=25)		5,96	4,29	1,67	7,63
	DE, WFG (n=86)		6,37	2,85	3,52	9,89
	ES, FEMAC (n=18)		6,44	4,33	2,11	8,56
Mean of means (weighted by n)			6,32	3,66	2,66	8,98













Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Quantitative Analysis – Internal Factors

29. Impact of climate change						
Cluster			Relevance	Performance	Performance Gap	Pressure to act
	RS, AC Serbia (n=18)		5,71	4,65	1,06	6,77
	CZ, AUTOKLASTR (n=9)		4,50	3,14	1,36	5,86
	ES, CAAR (n=27)		5,44	4,74	0,70	6,15
	IT, COMET (n=25)		4,76	3,54	1,22	5,98
	DE, WFG (n=86)		5,07	4,05	1,02	6,10
	ES, FEMAC (n=18)		5,56	4,28	1,28	6,83
Mean of means (weighted by n)			5,17	4,14	1,03	6,20

Relevance and Performance on a scale from 1 (Insignificant/Very Poor) to 7 (Very High/Very Good)

Performance Gap = Relevance – Performance

Pressure to act = Performance Gap + Relevance (Double weighted Relevance)



Open-Ended Response – Ukraine (excerpt)



Loss of sales. Approximately 7% of our production (Russia and Ukraine).

Increased raw material costs, chips

The energy lords are doing more harm than the drop in production in Russia.

Downturn in activity due to affected customers' production plants in the region

For the time being, we have not been affected

Employees have gone to Ukraine. Who knows if they will return healthy. Pre-products are missing!

Raw materials affect plants in Eastern Europe which may increase production in Western European plants, leading to the opposite situation in the near future.

Cancellation of orders for Ukraine. Incertesa with respect to markets such as Russia and Belarus.

WE HAVE AT THIS MOMENT STOPPED ORDERS FOR UKRAINE AND RUSSIA

Supply shock Need new supplies/alternative supplies (not today but in a very near future)



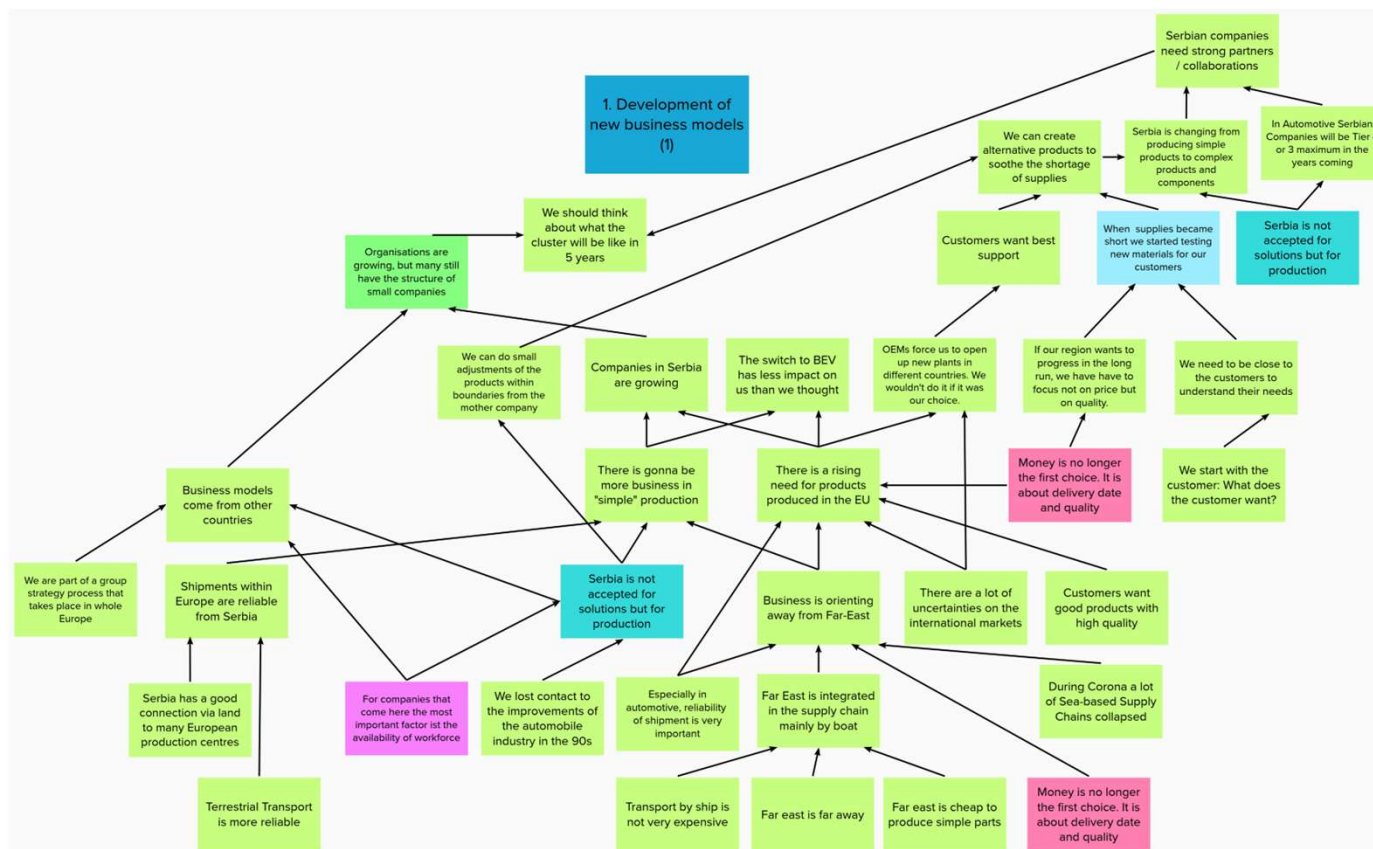
Qualitative Analysis

Priorized Factors
1. Development of new business models
2. Increase in efficiency
3. Process innovation
4. Digitalisation of processes and products
5. Upskilling / reskilling of workforce
6. Availability of skilled and qualified workforce
7. Availability of digitally skilled workforce
8. Bargaining power of customers
9. Bargaining power of service providers / suppliers

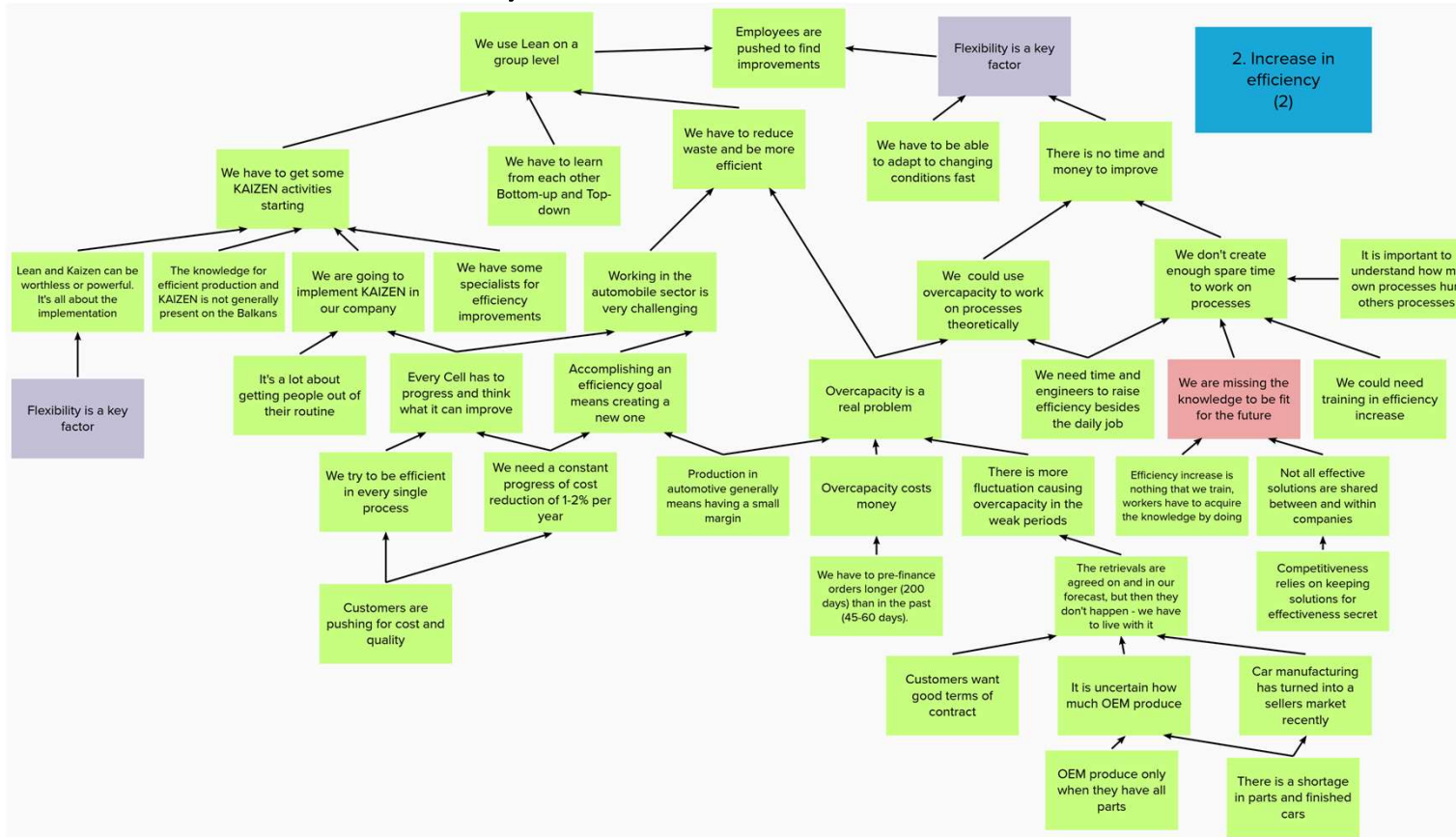
The most relevant factors will be analysed qualitatively in order to gain a deep understanding of the underlying assumptions and obstacles.



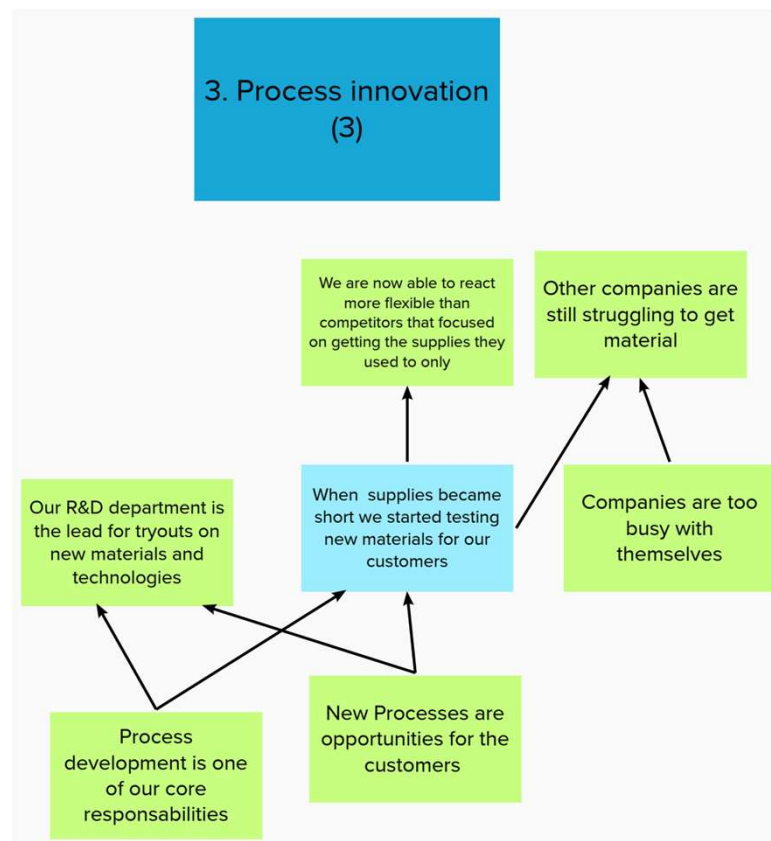
Qualitative Analysis – AC Serbia



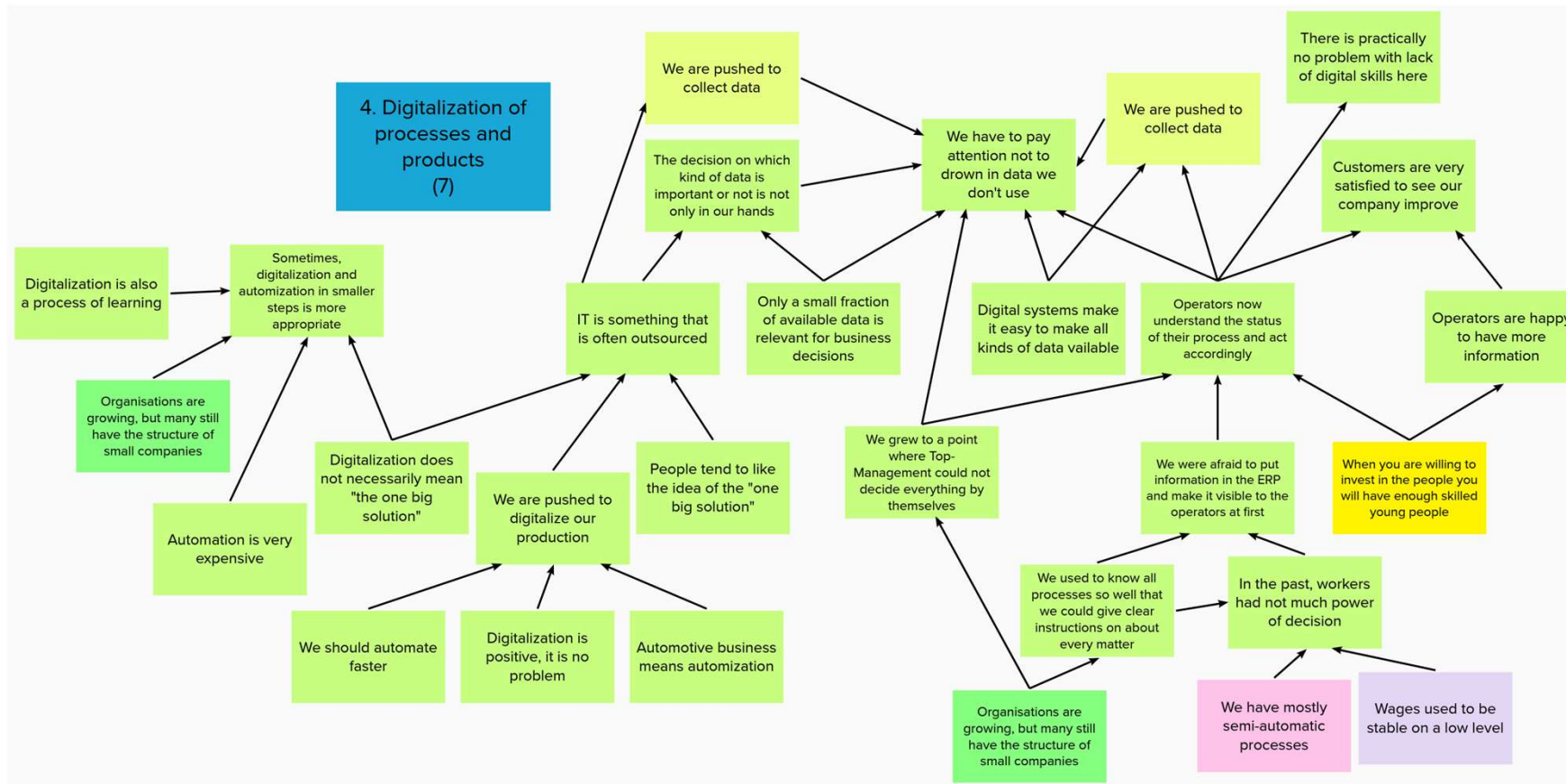
Qualitative Analysis – AC Serbia



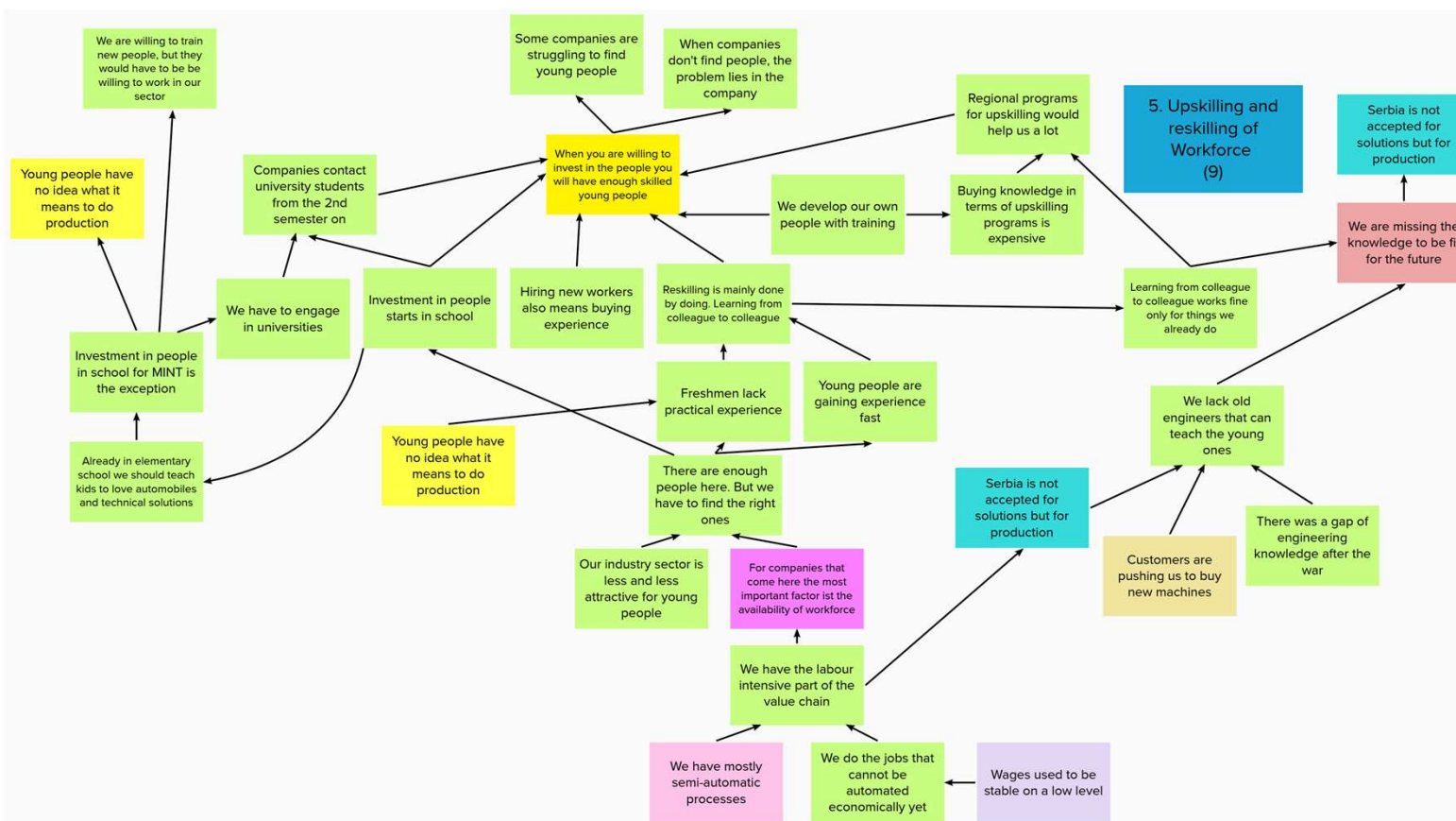
Qualitative Analysis – AC Serbia



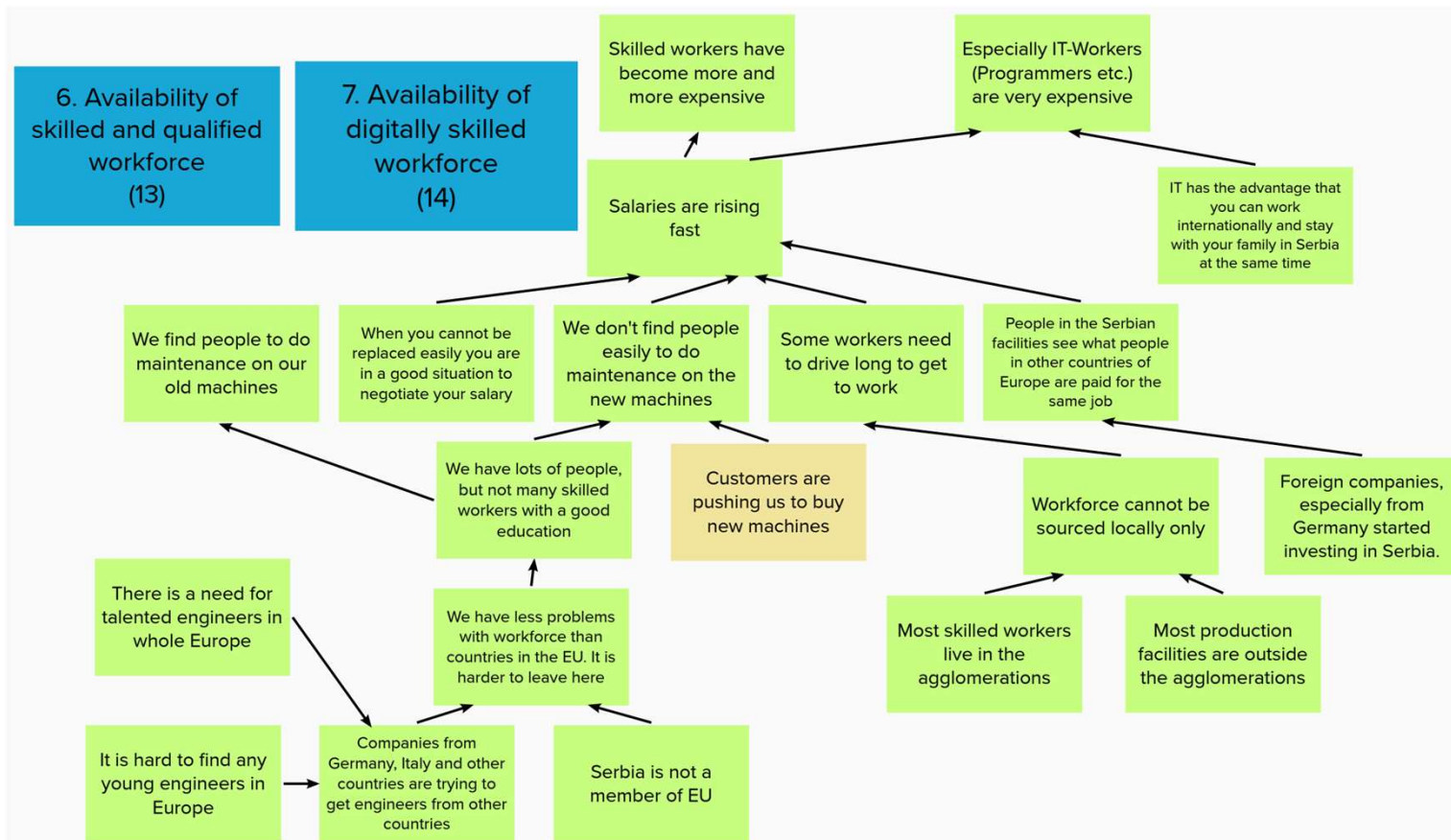
Qualitative Analysis – AC Serbia



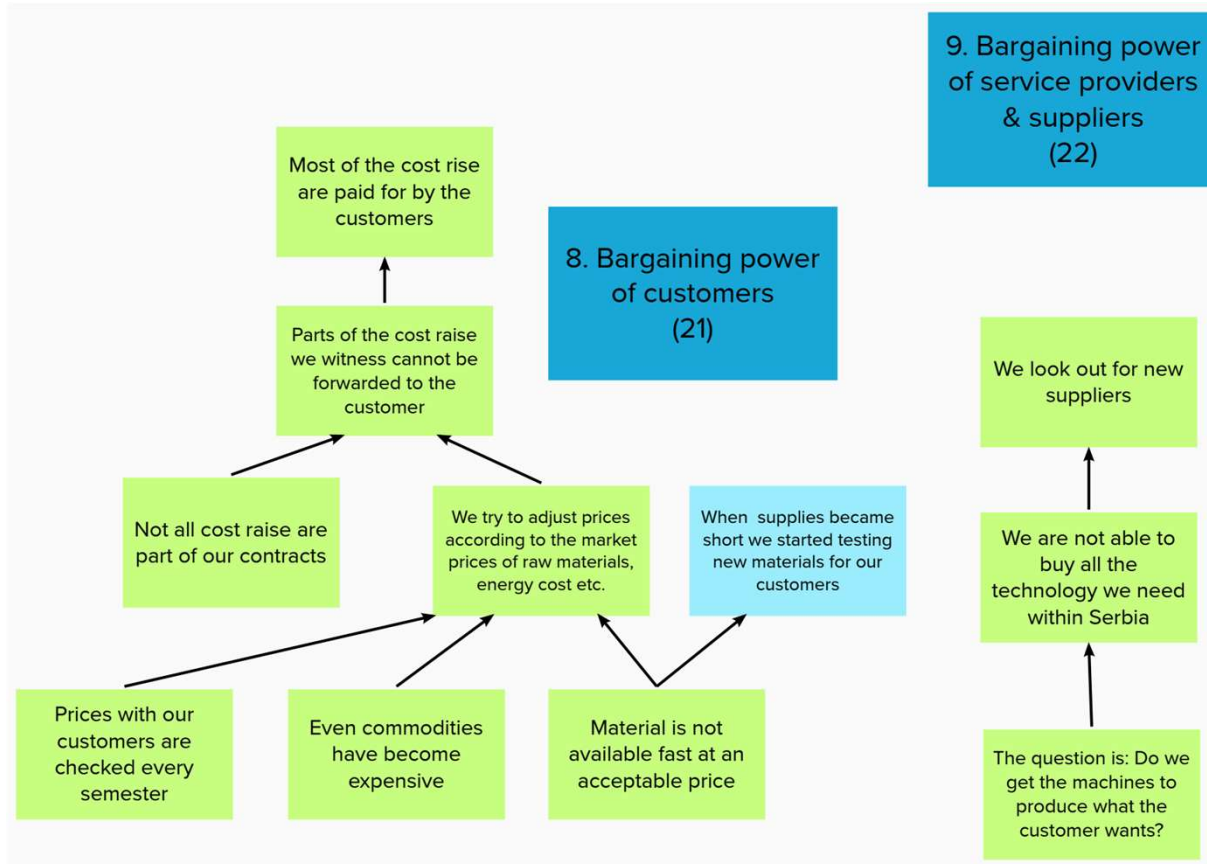
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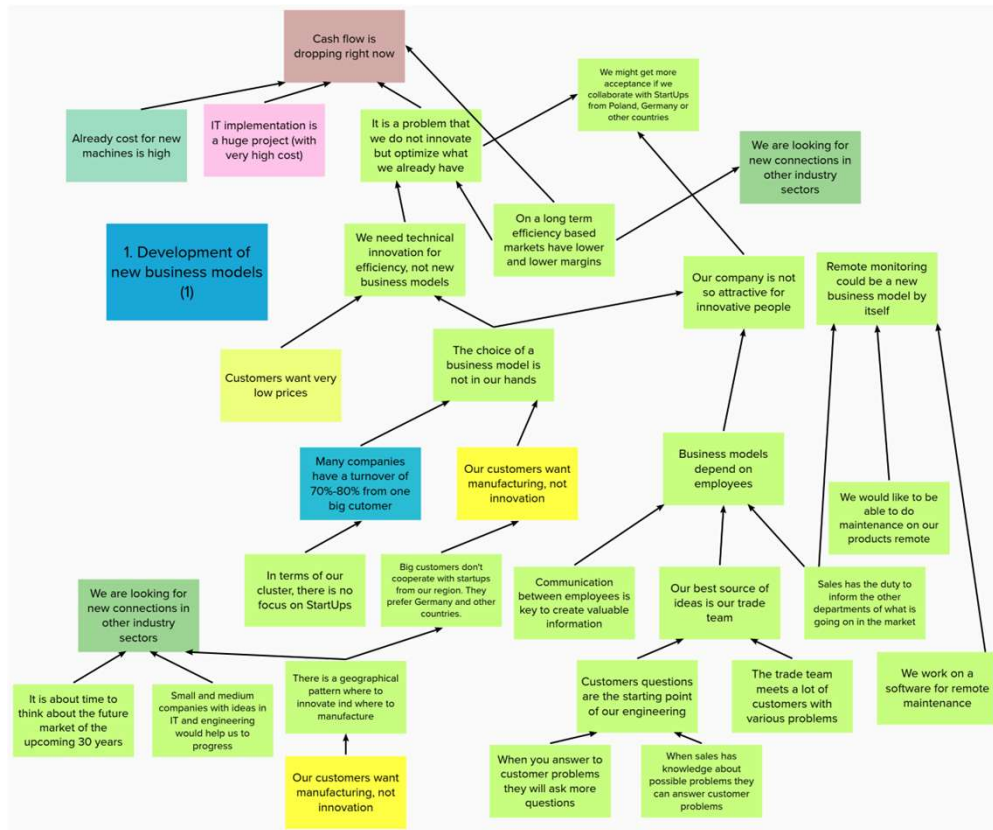
Qualitative Analysis – AC Serbia



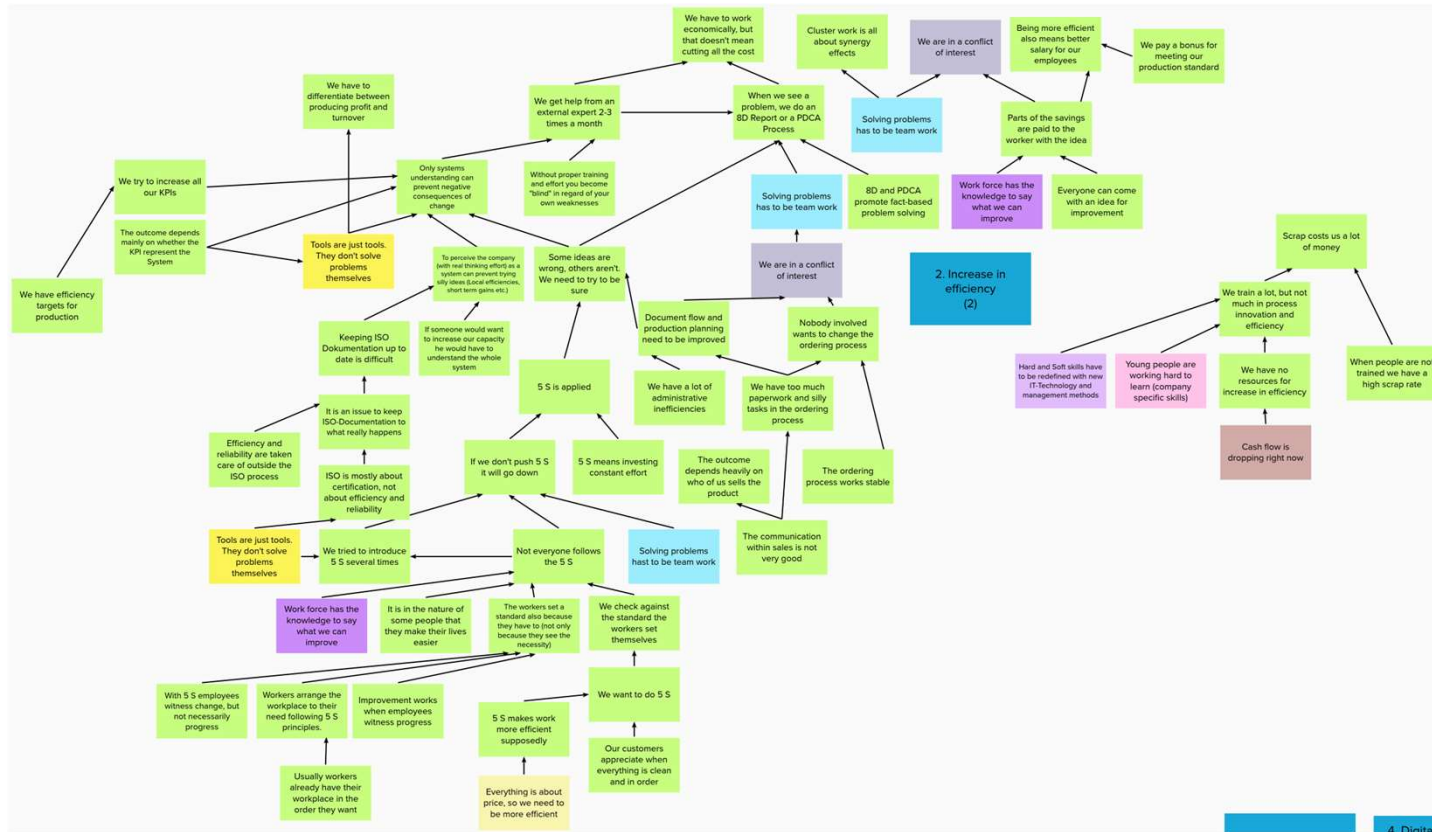
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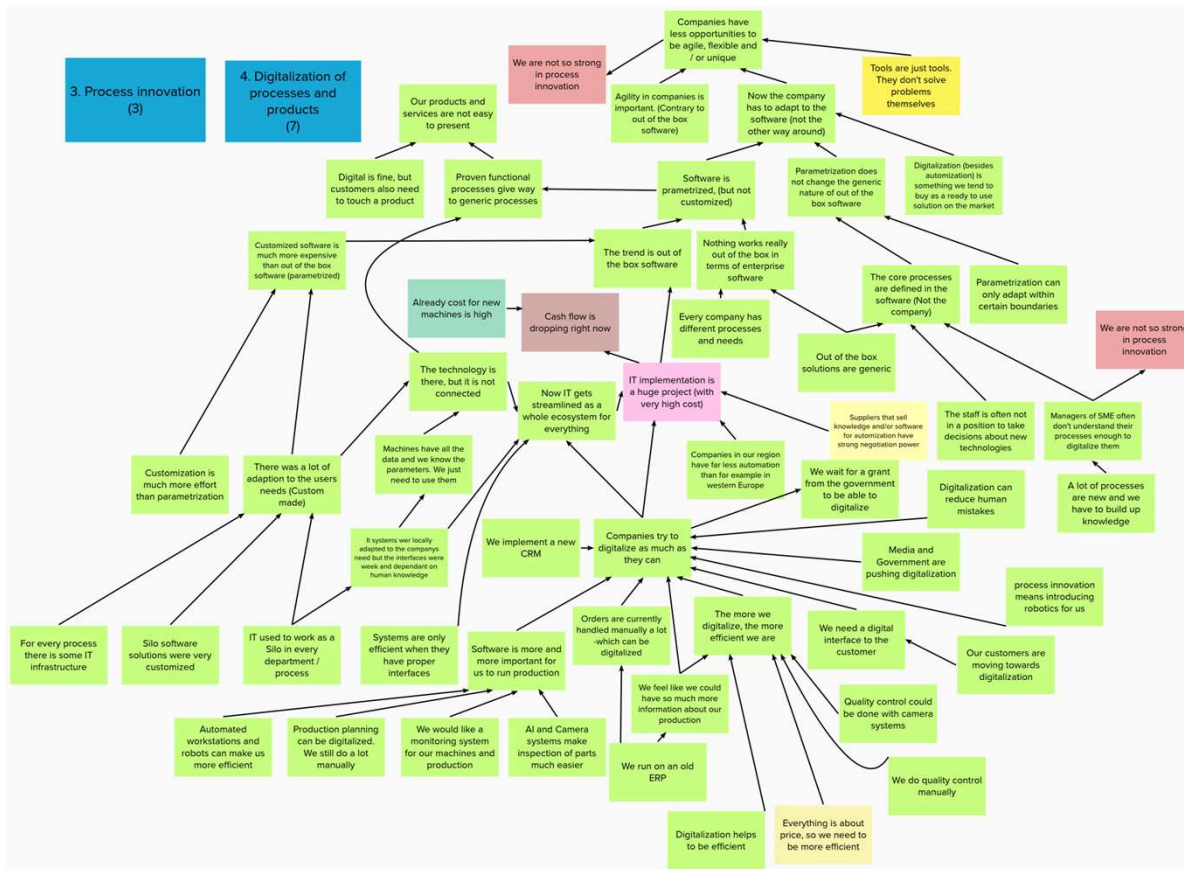
Qualitative Analysis – AUTOKLASTR

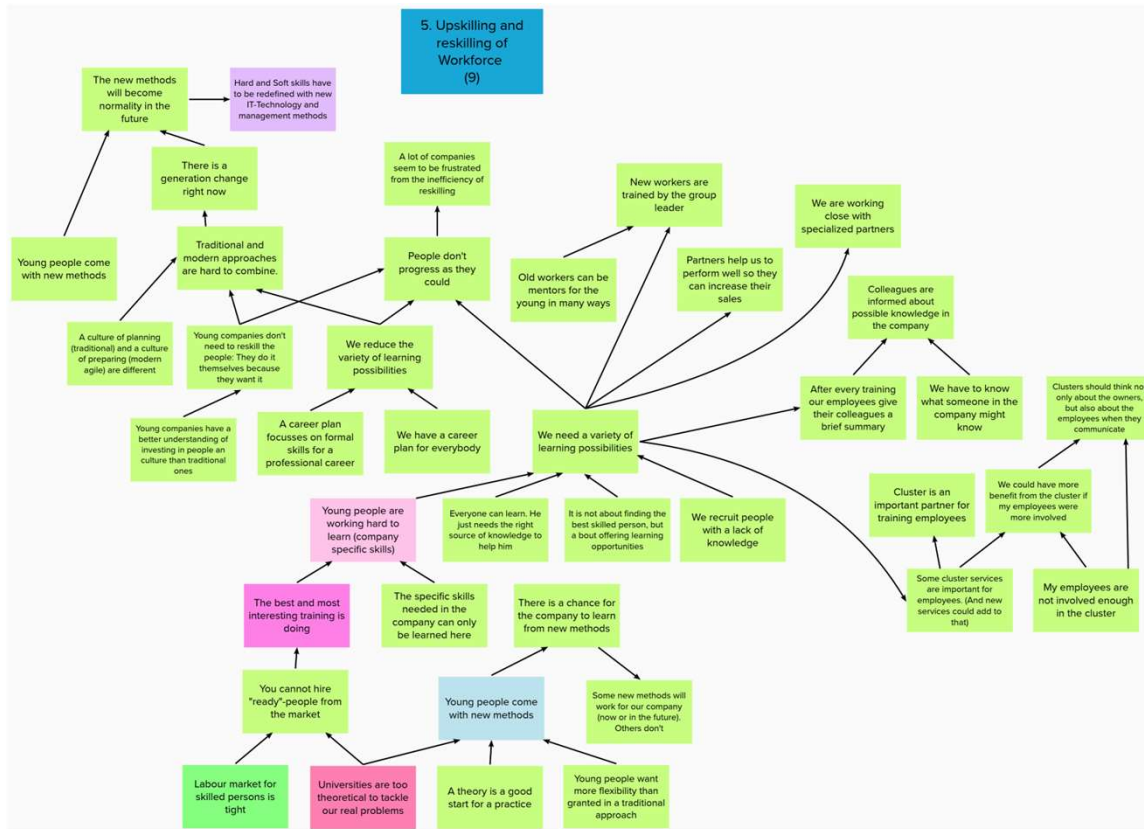


Qualitative Analysis – AUTOKLASTR

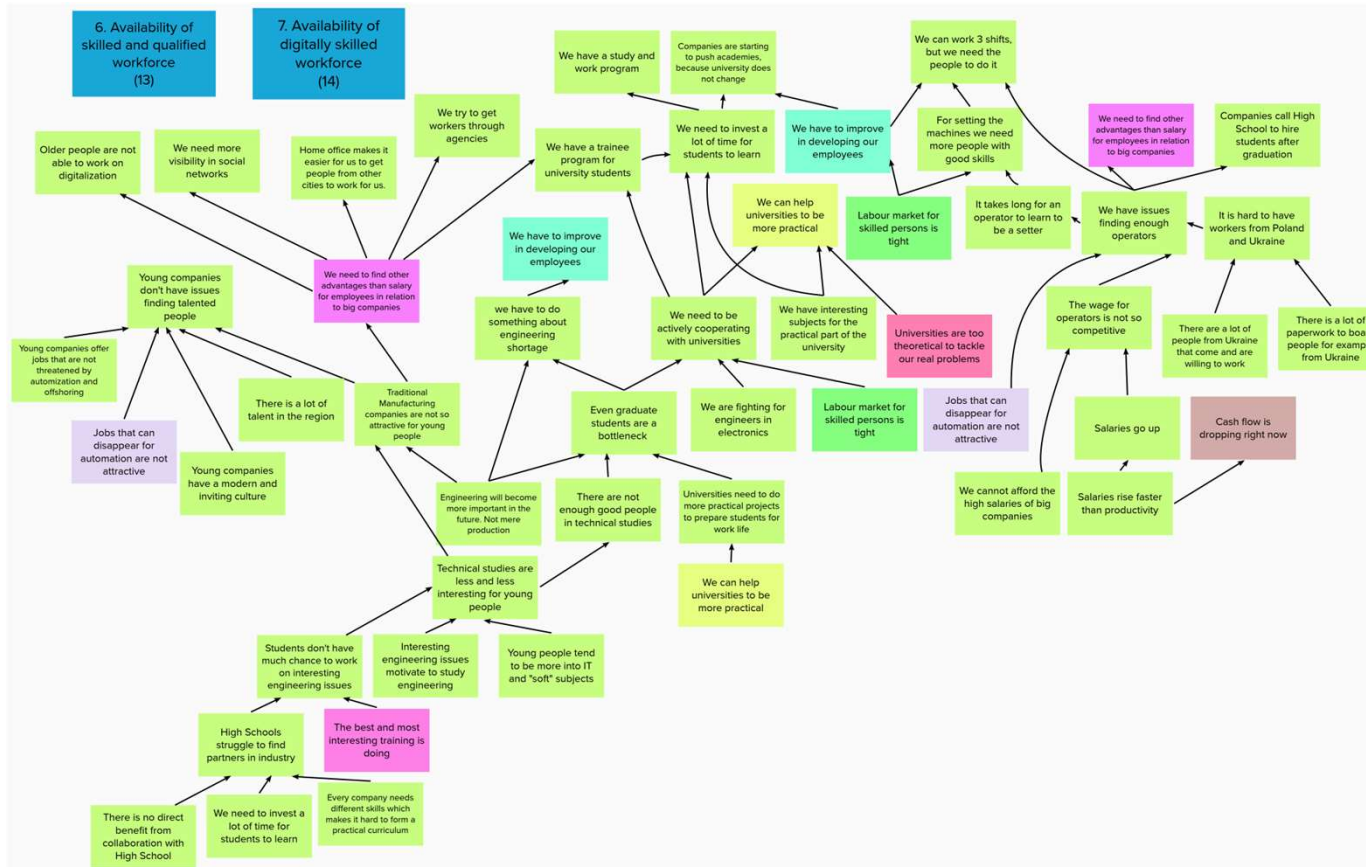


Qualitative Analysis – AUTOKLASTR





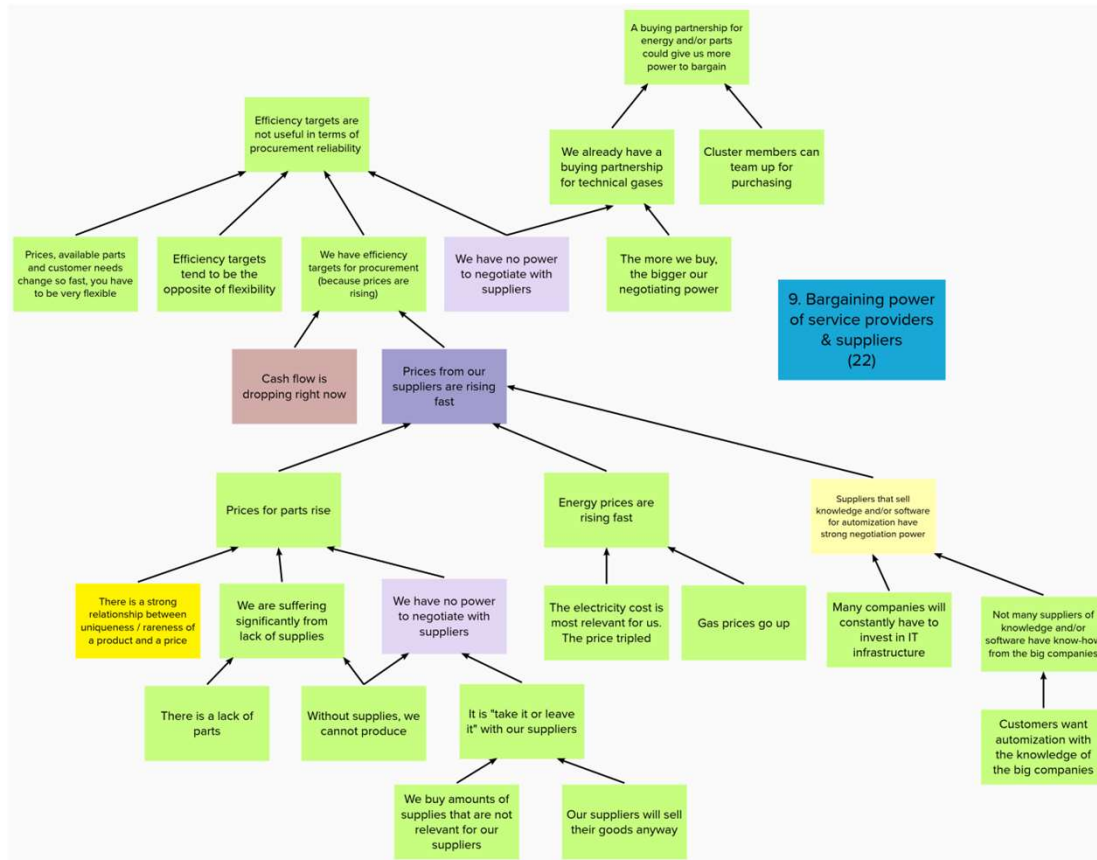
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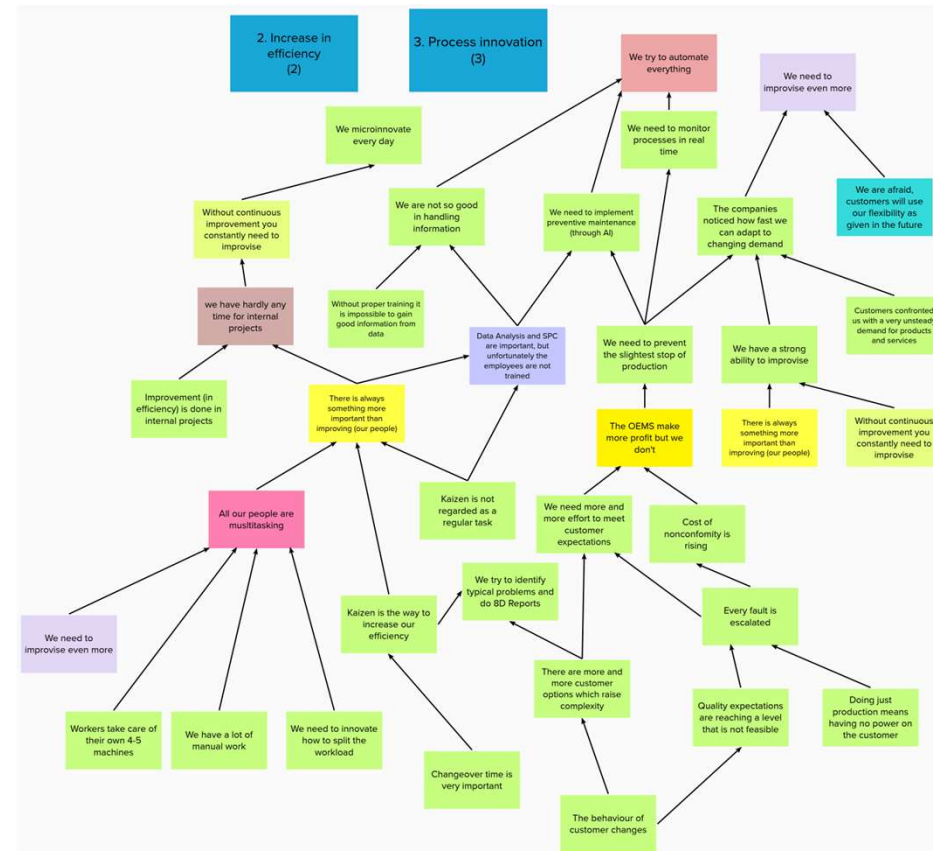
Qualitative Analysis – AUTOKLASTR



Qualitative Analysis – AUTOKLASTR



Qualitative Analysis – CAAR

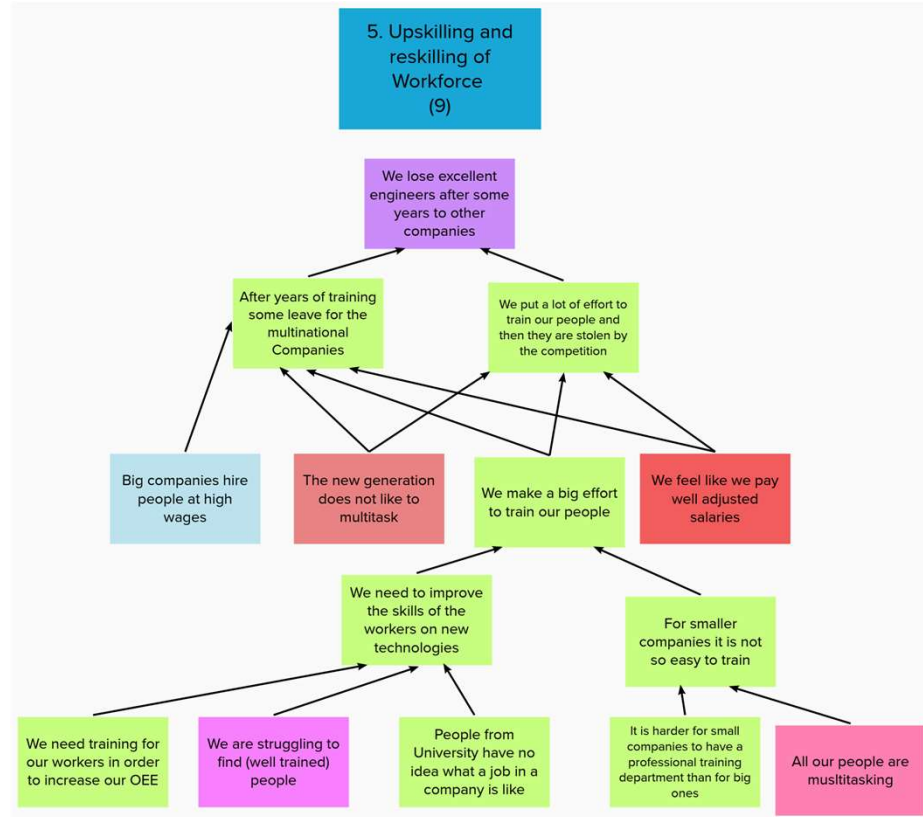


Qualitative Analysis – CAAR

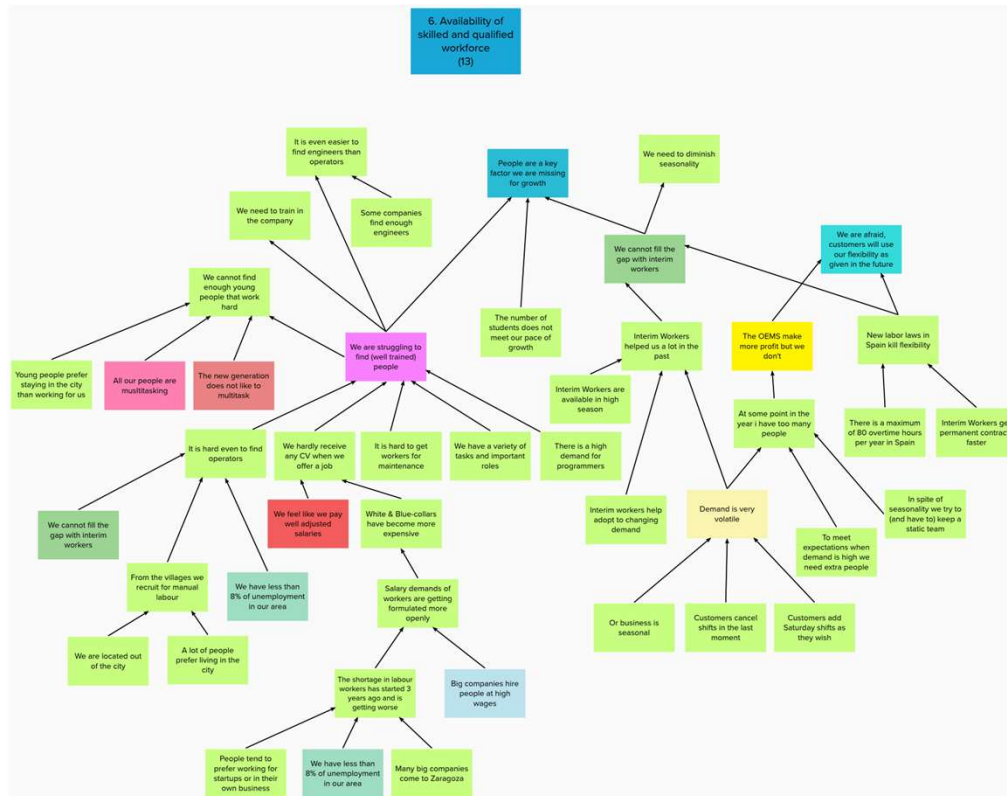
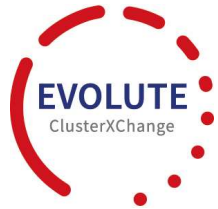
4. Digitalization of processes and products (7)



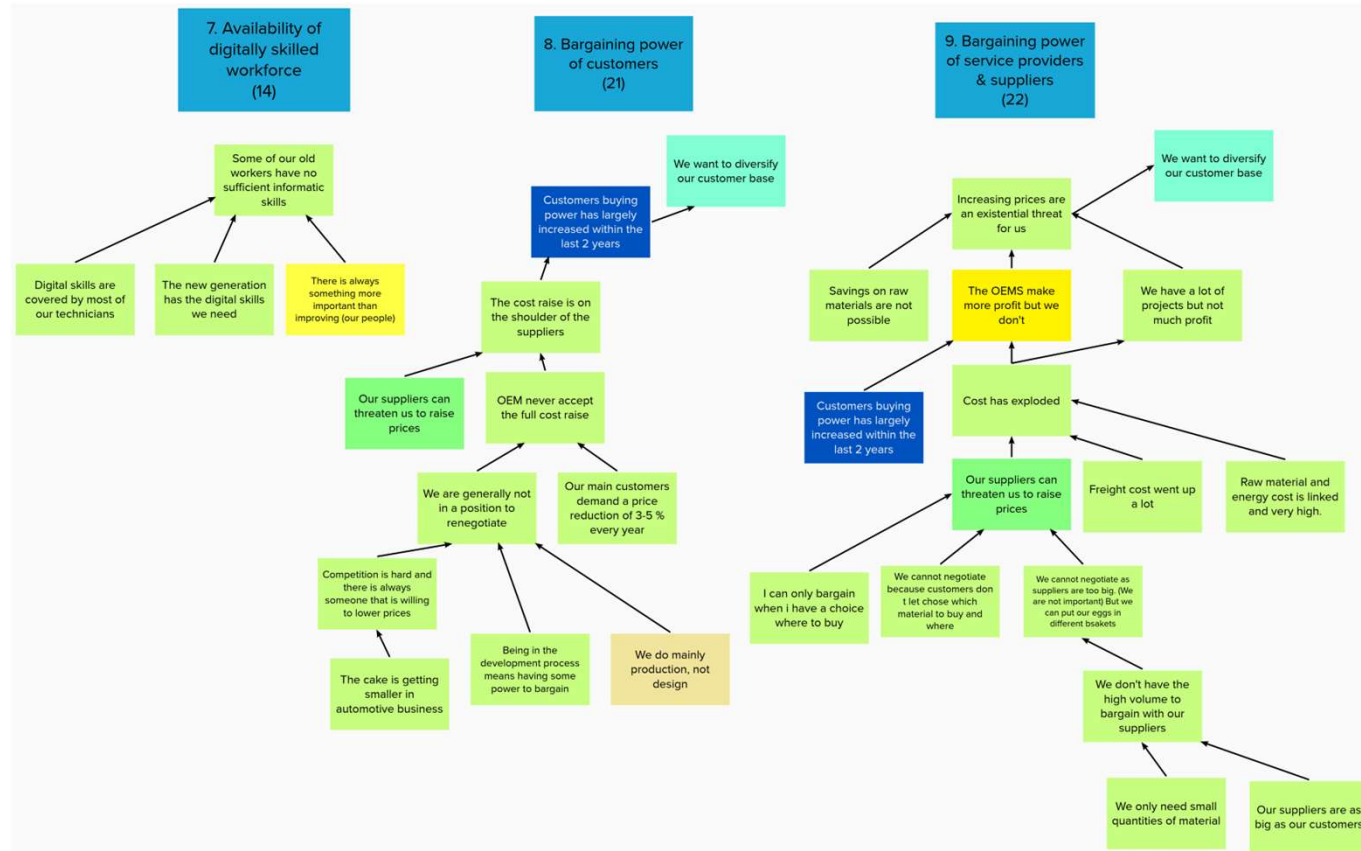
5. Upskilling and reskilling of Workforce (9)



Qualitative Analysis – CAAR

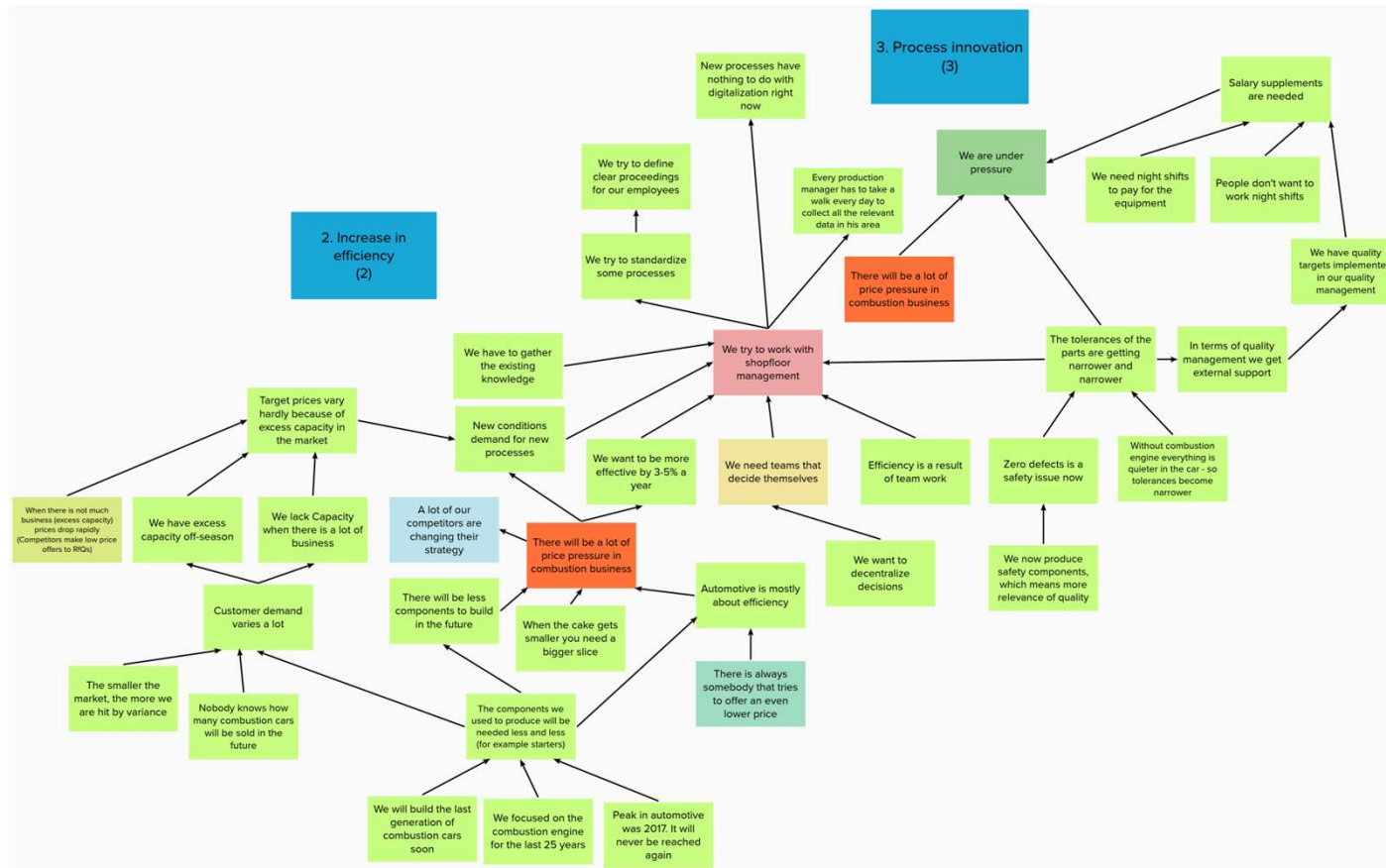


Qualitative Analysis – CAAR



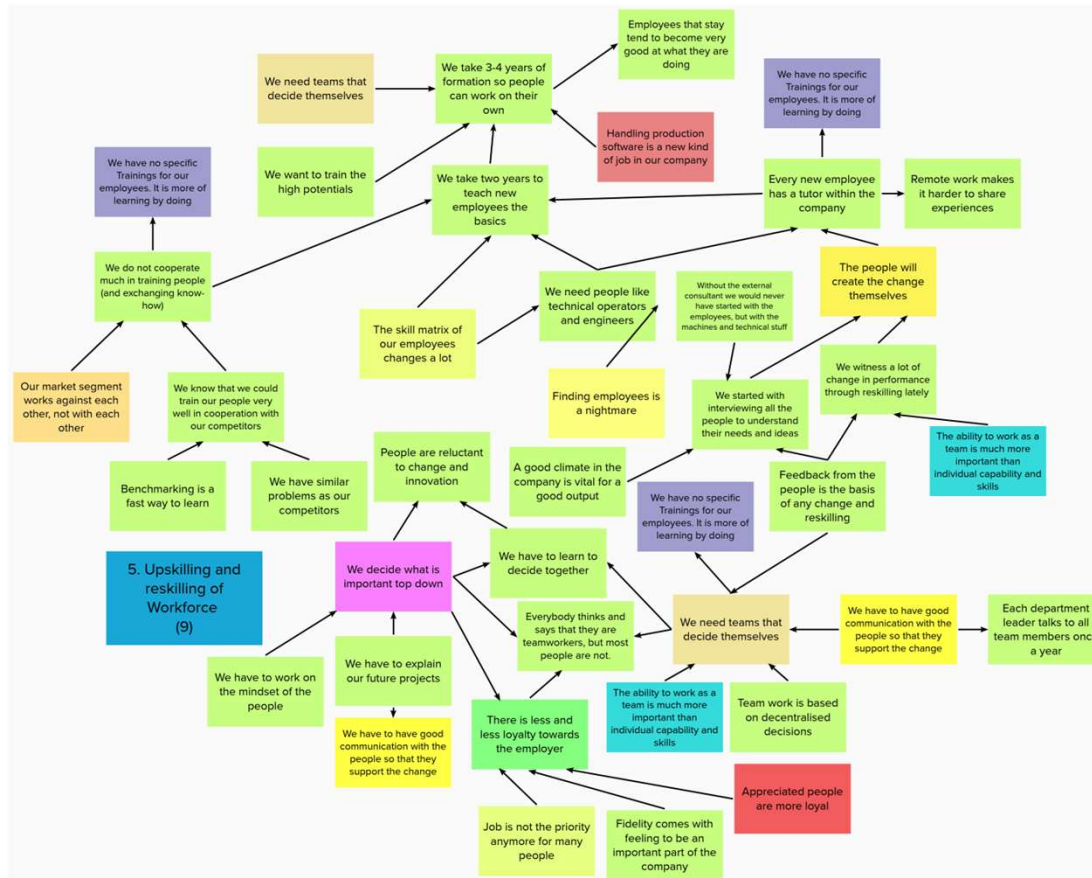
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Qualitative Analysis – COMET

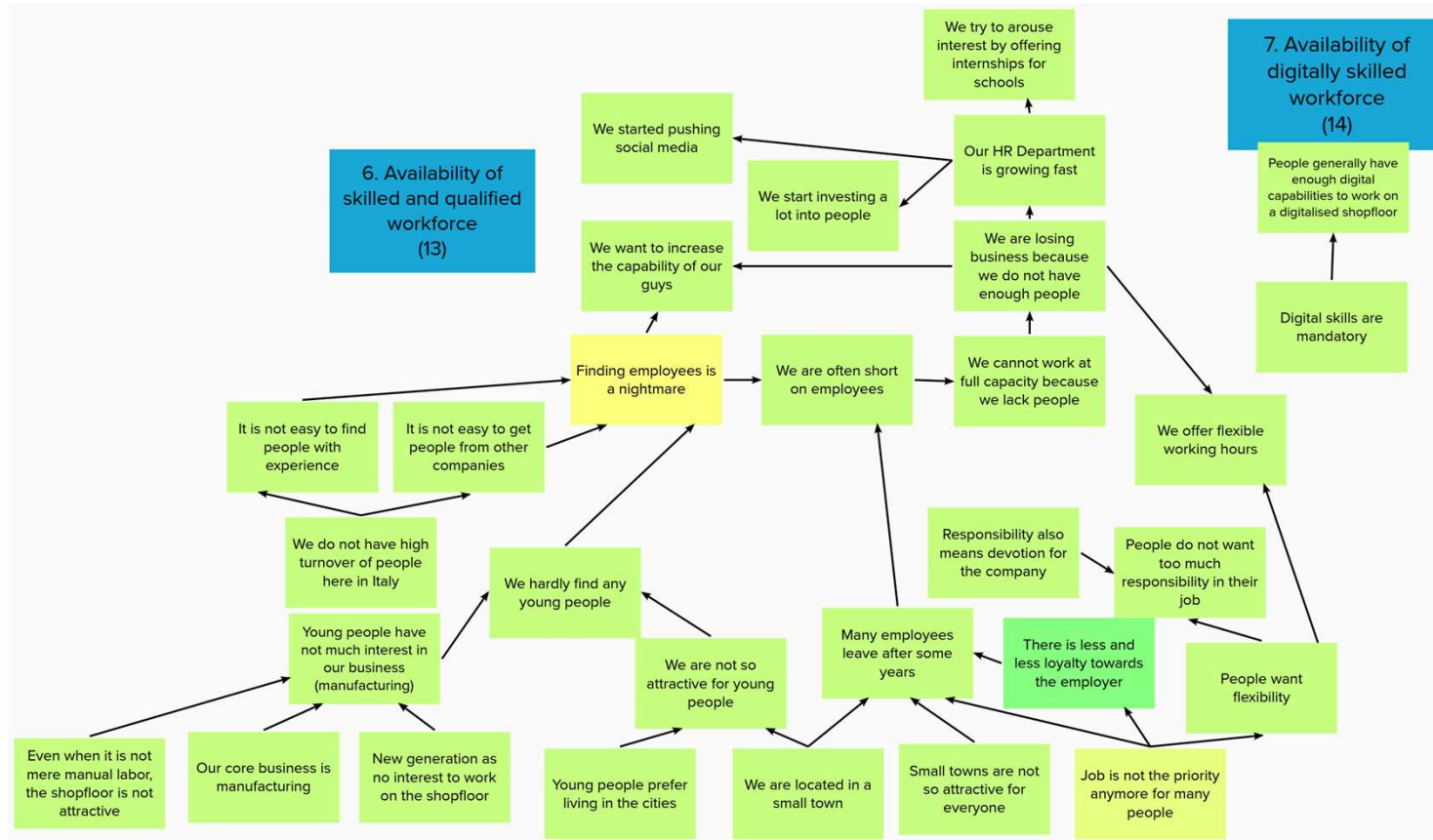




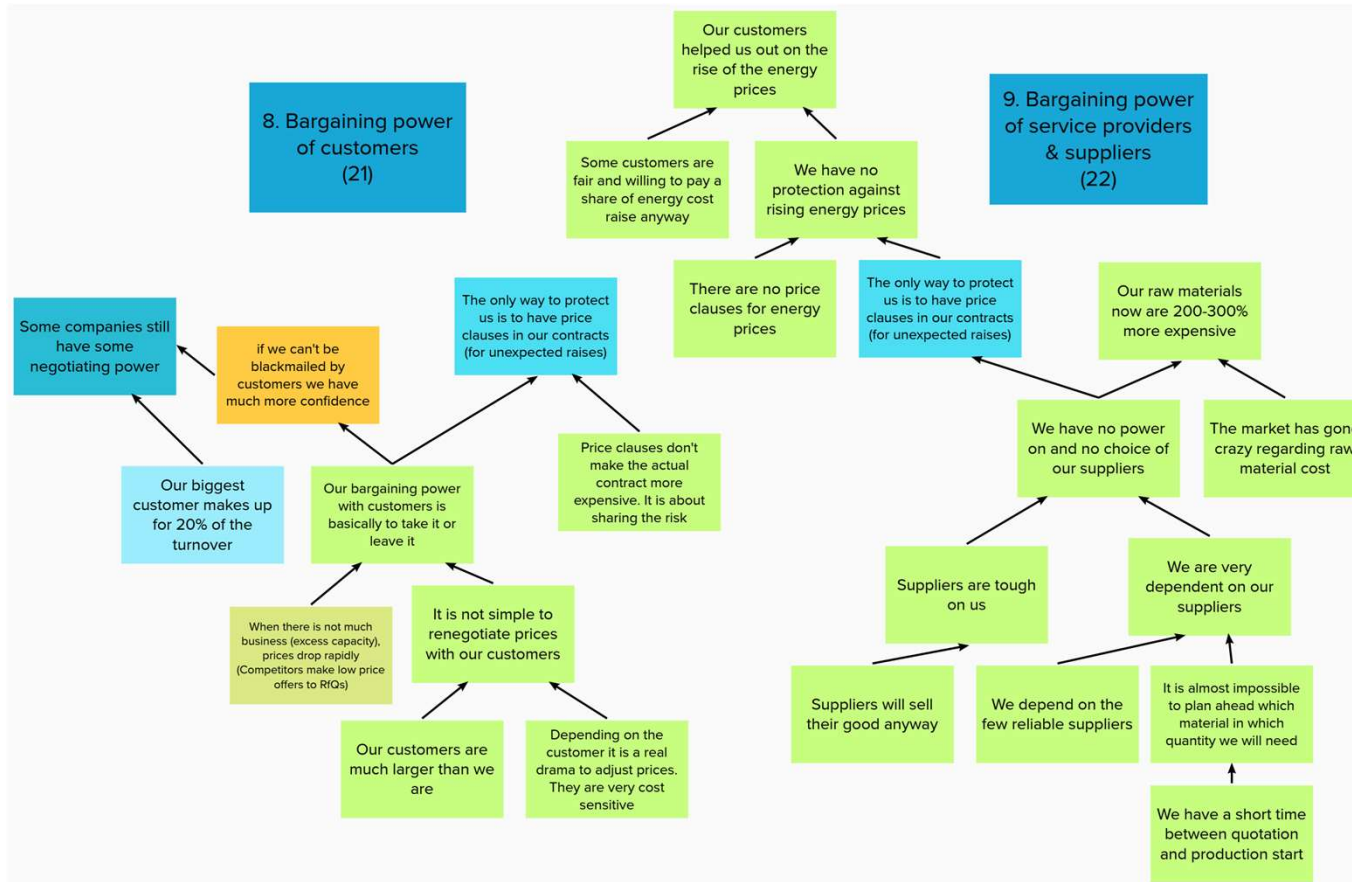
Qualitative Analysis – COMET



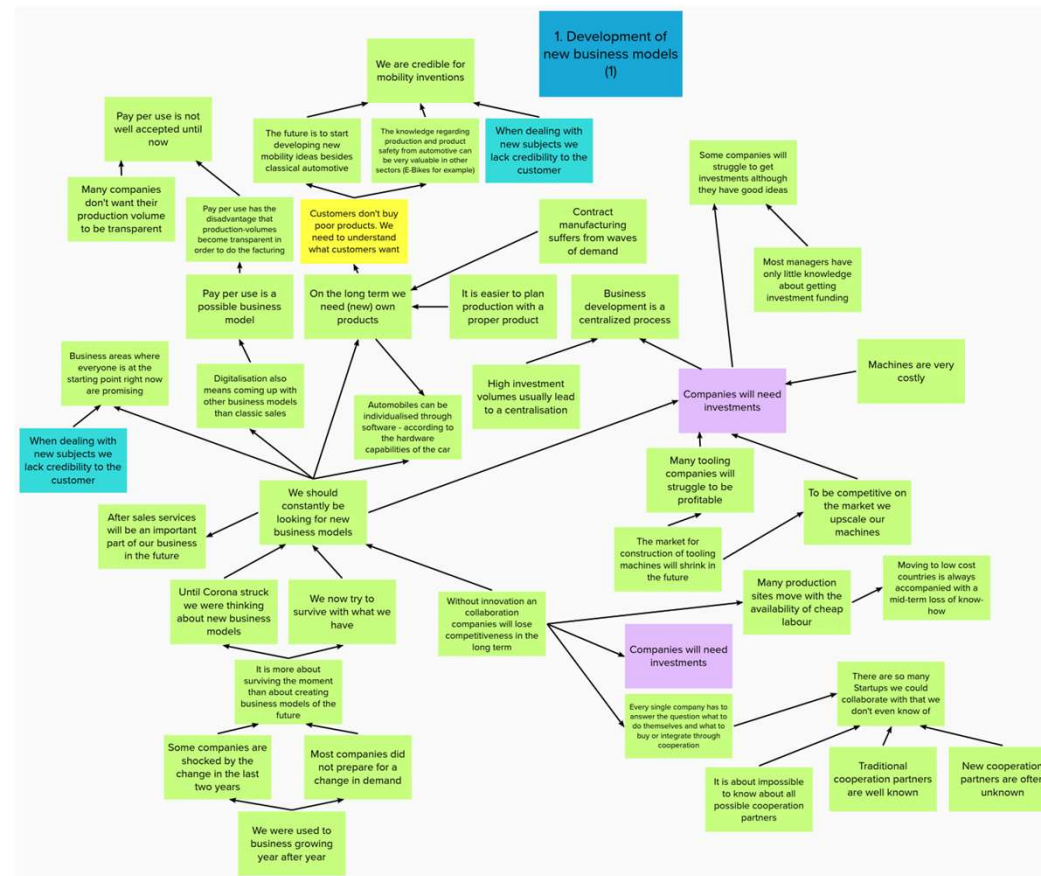
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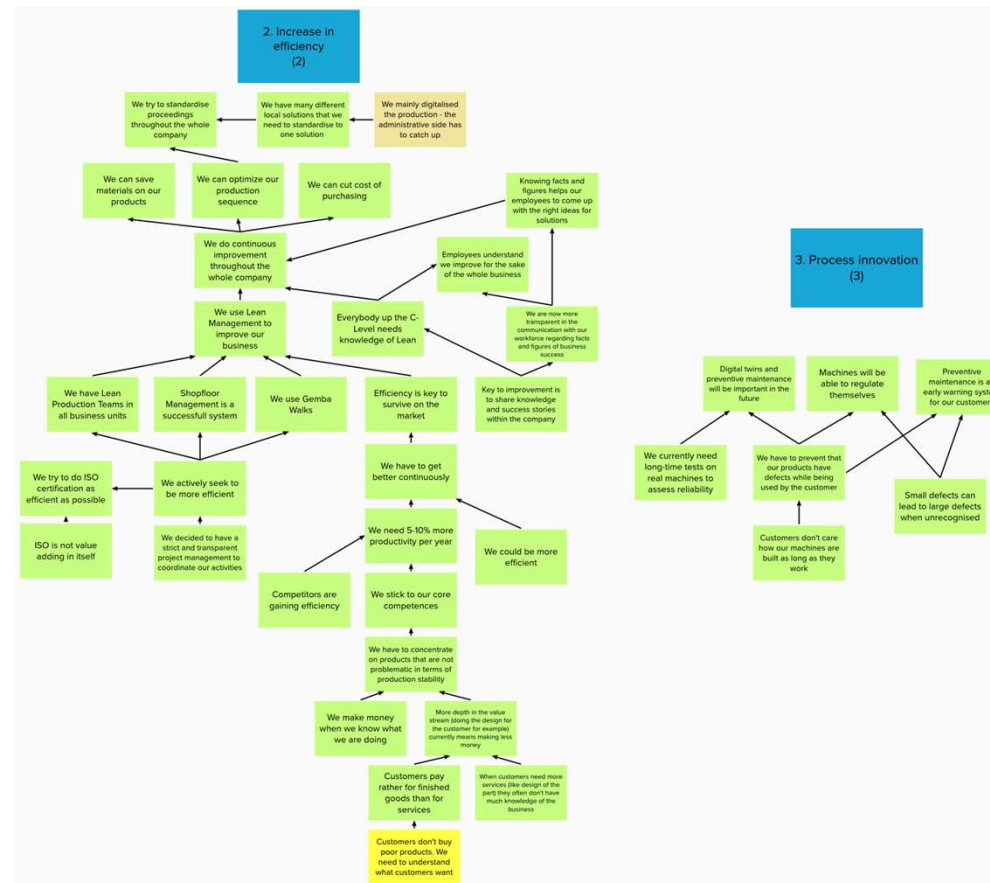
Qualitative Analysis – COMET



Qualitative Analysis – DIALOG

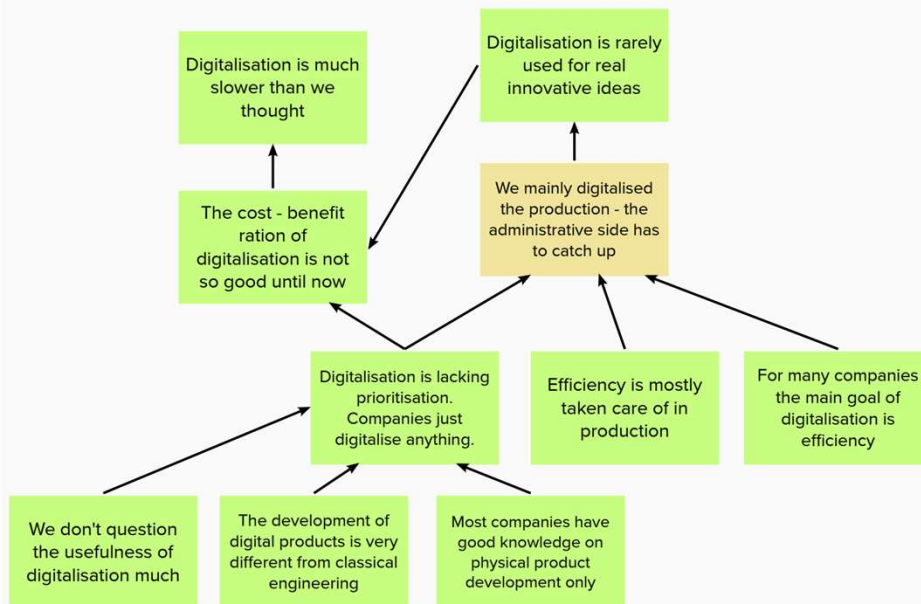


Qualitative Analysis – DIALOG

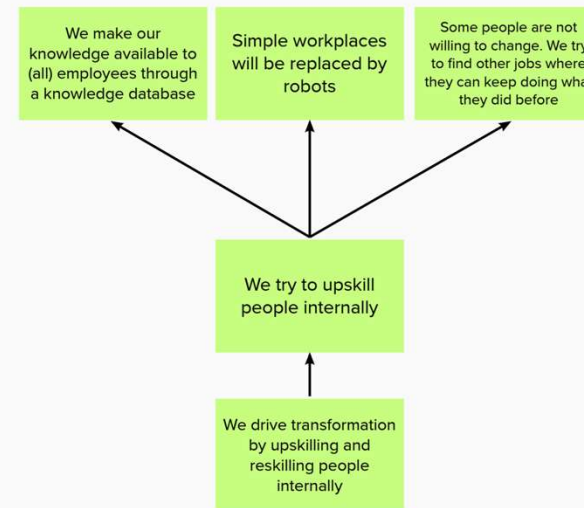


Qualitative Analysis – WFG

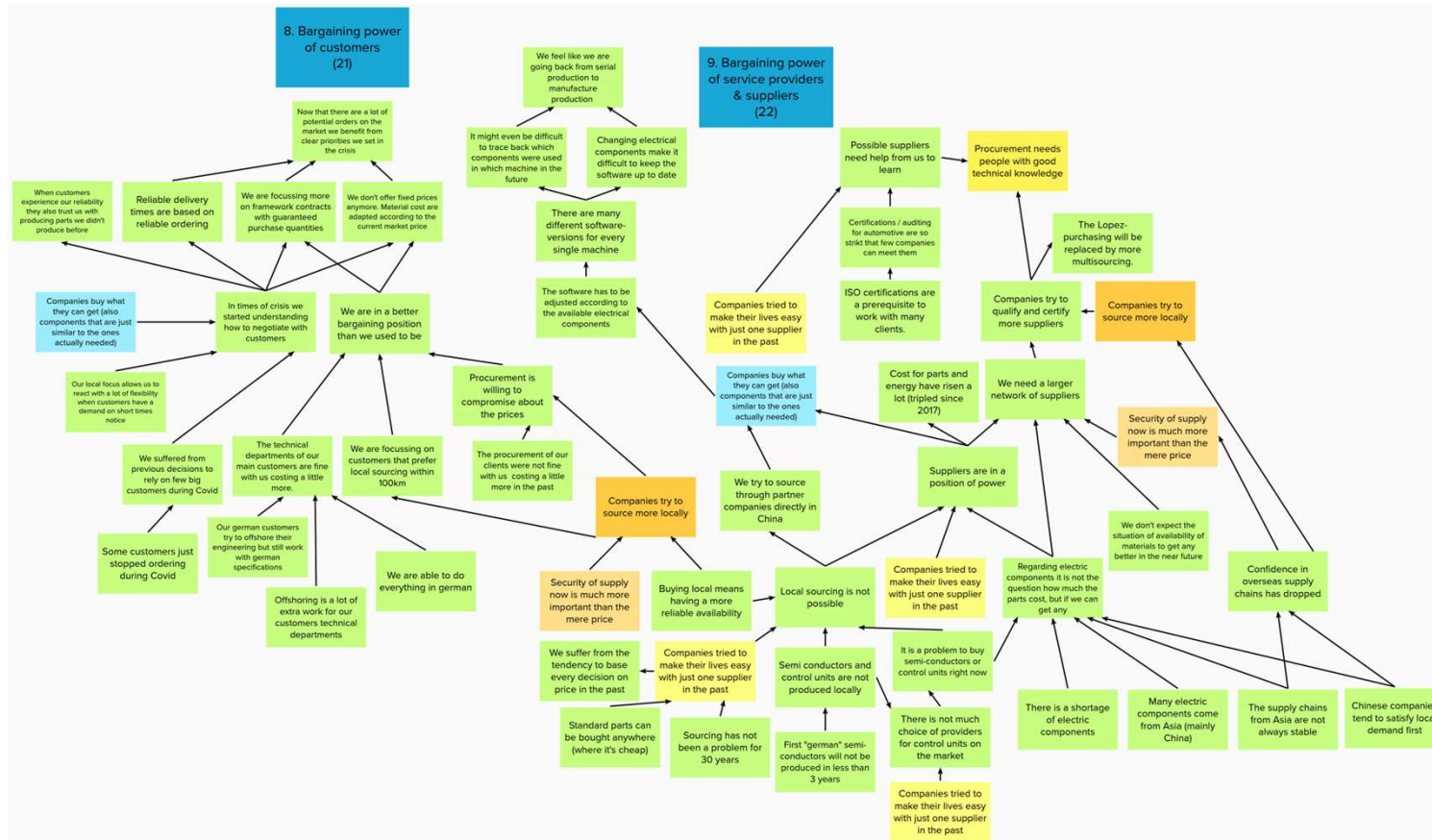
4. Digitalisation of processes and products (7)



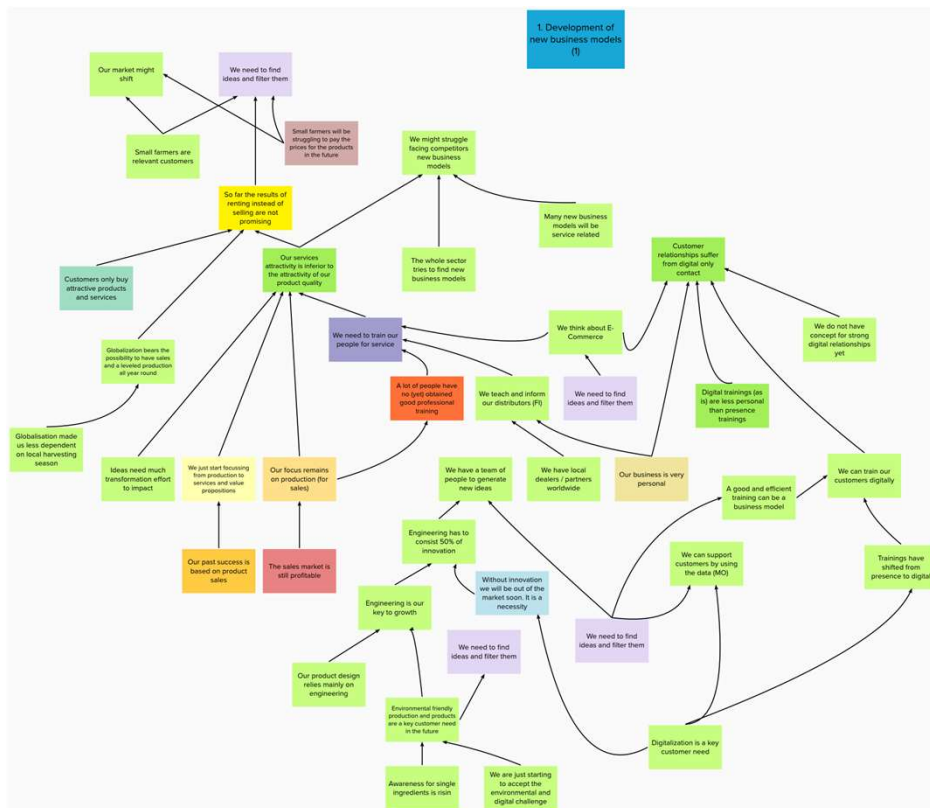
5. Upskilling and reskilling of Workforce (9)



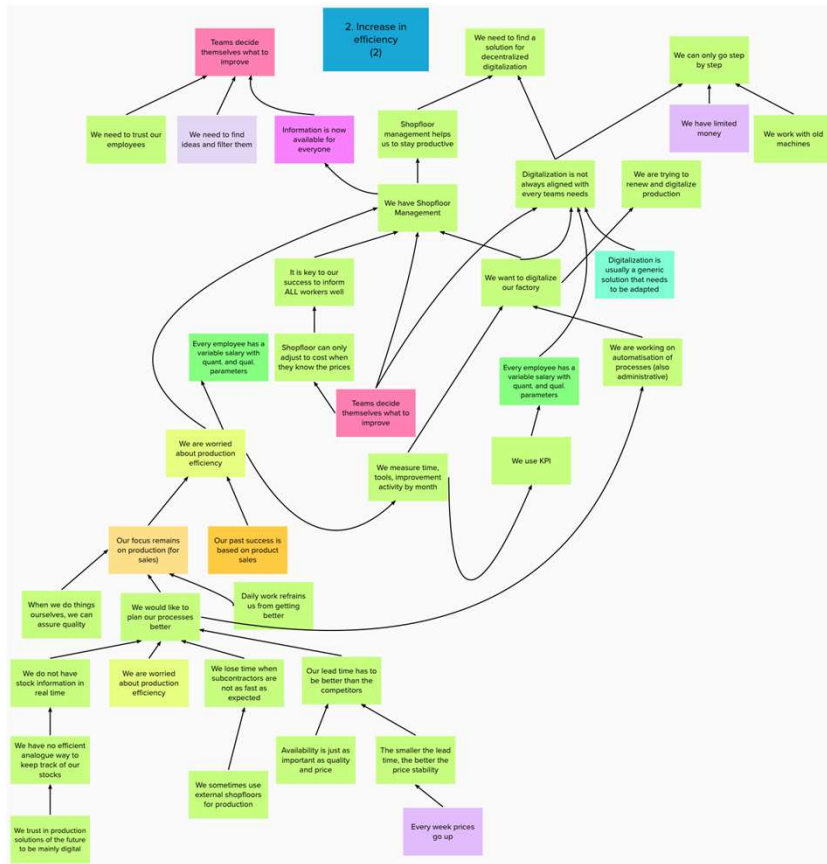
Qualitative Analysis – WFG



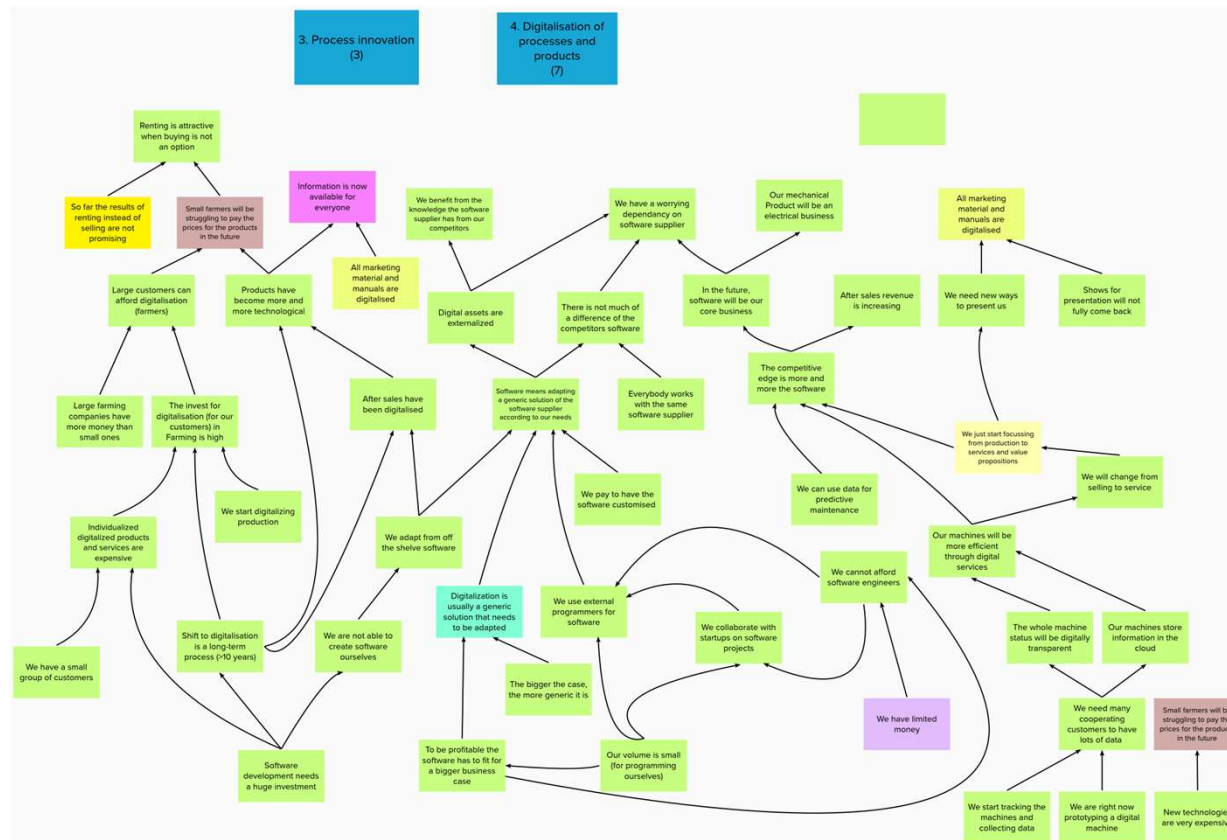
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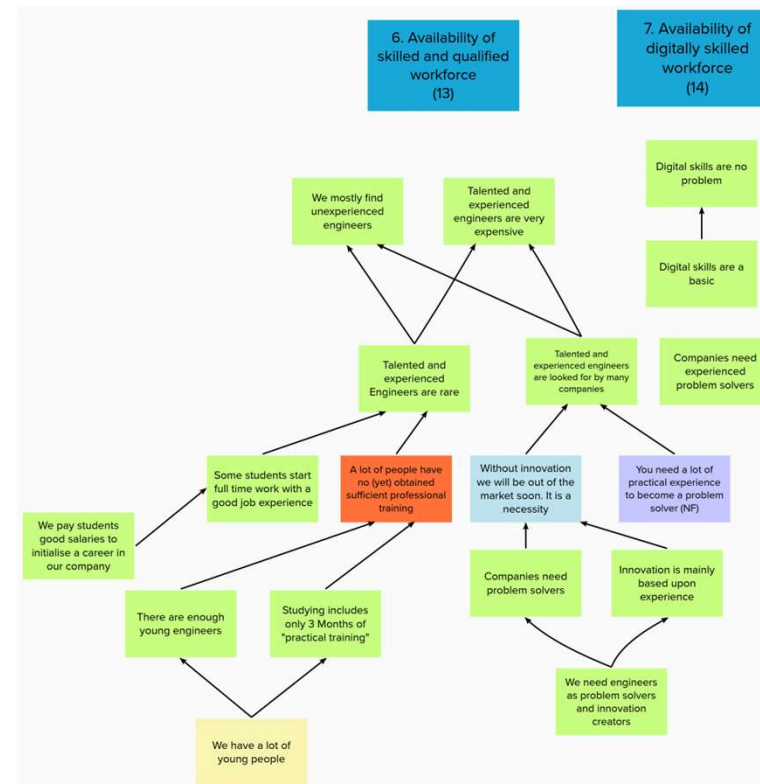
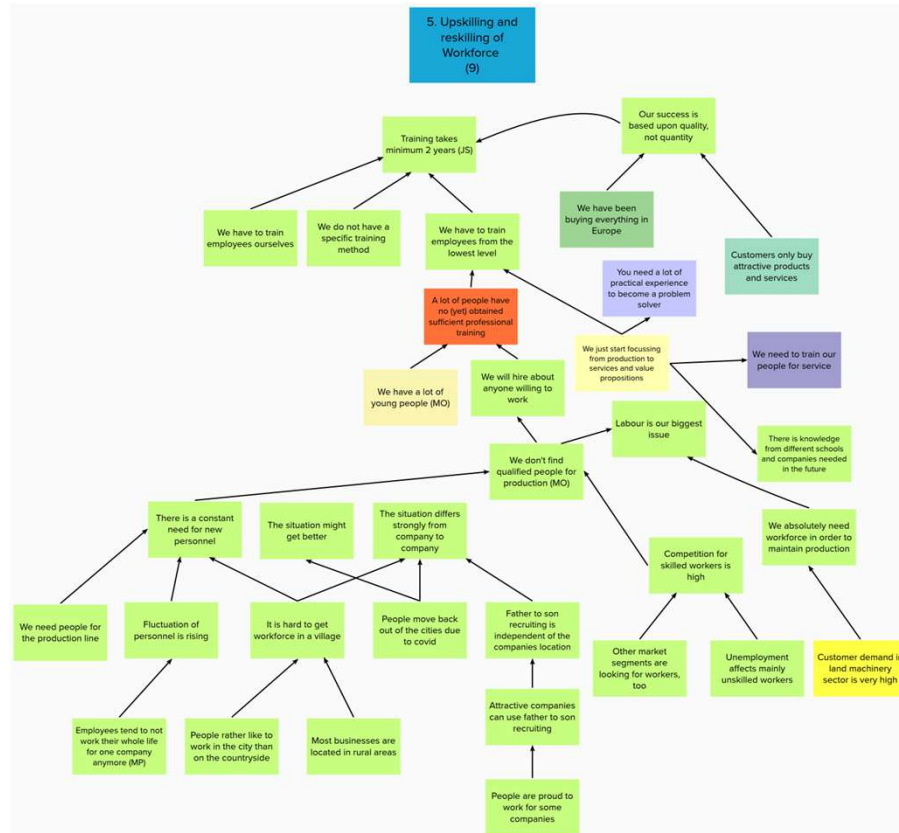
Qualitative Analysis – FEMAC



Qualitative Analysis – FEMAC



Qualitative Analysis – FEMAC



Qualitative Analysis – FEMAC

