Agenda

1. Introduction to the Expert Group on Clusters
   Peter Czaga, *Policy Officer, DG GROW, European Commission*

2. National Cluster Policies
   Jan-Philipp Kramer, *team member of the European Cluster Collaboration Platform*

3. Panel debate
   Alberto Pezzi, *Senior Manager, ACCIÓ*
   Agata Wancio, *Deputy Director, Innovation and Industrial Policy Department, Ministry of Economic Development and Technology (Poland)*
   Antonio Novo, *President, European Clusters Alliance*
   Bianca Muntean, *Cluster Manager, Transilvania IT Cluster*

4. Examples of national cluster funding

Housekeeping rules

Jennifer Baker, presenter

- Please use the **Q&A function to ask questions,** and the **chat function** to comment or share links

- Please **raise** your hand if you like to take the floor and **unmute** yourself.

- If you would like to be on video, please ask us to **activate your camera**.

- Please note that the session is being **recorded**.

First findings from the ECCP Summary report – 2022 edition

EU Cluster Talks, 14 December 2022

Dr. Jan-Philipp Kramer, Prognos AG/ECCP

EUROPEAN CLUSTER COLLABORATION PLATFORM

- Factsheets updated for EU, COSME and third countries
  - Update of 53 factsheets from 2020
  - Elaboration of 3 new factsheets (NO, LI, UK)

- Desk research at national level from June-October 2022 (mostly in national languages)

- Validation survey with national authorities in EU and COSME countries
- Additional checks by experts from European Clusters Alliance (ECA)

Insights

1. EU cluster landscape and economy

2. Overview of the EU cluster policy and support initatives

3. Cluster policies and programmes across Europe and third countries

4. State of play of cluster policy across Europe and third countries

5. Conclusions and recommendations for future cluster policies

EUROPEAN CLUSTER COLLABORATION PLATFORM

Summary report on cluster policies and programmes across Europe and third priority countries

2022 edition

14 December 2022

An initiative of the European Union

EUROPEAN CLUSTER COLLABORATION PLATFORM

- **90 policies were analysed** (35 national, 9 regional cluster policies, 38 broad & 8 sectoral policies)

- **50%** of all countries employ a **national and/or regional cluster policy**

- **Dedicated cluster policies** are almost exclusively introduced in EU27 and 3rd countries but only **rarely in COSME countries**

- More than **1,000 cluster organisations** operating in the EU27 (total on ECCP: around 1,400)
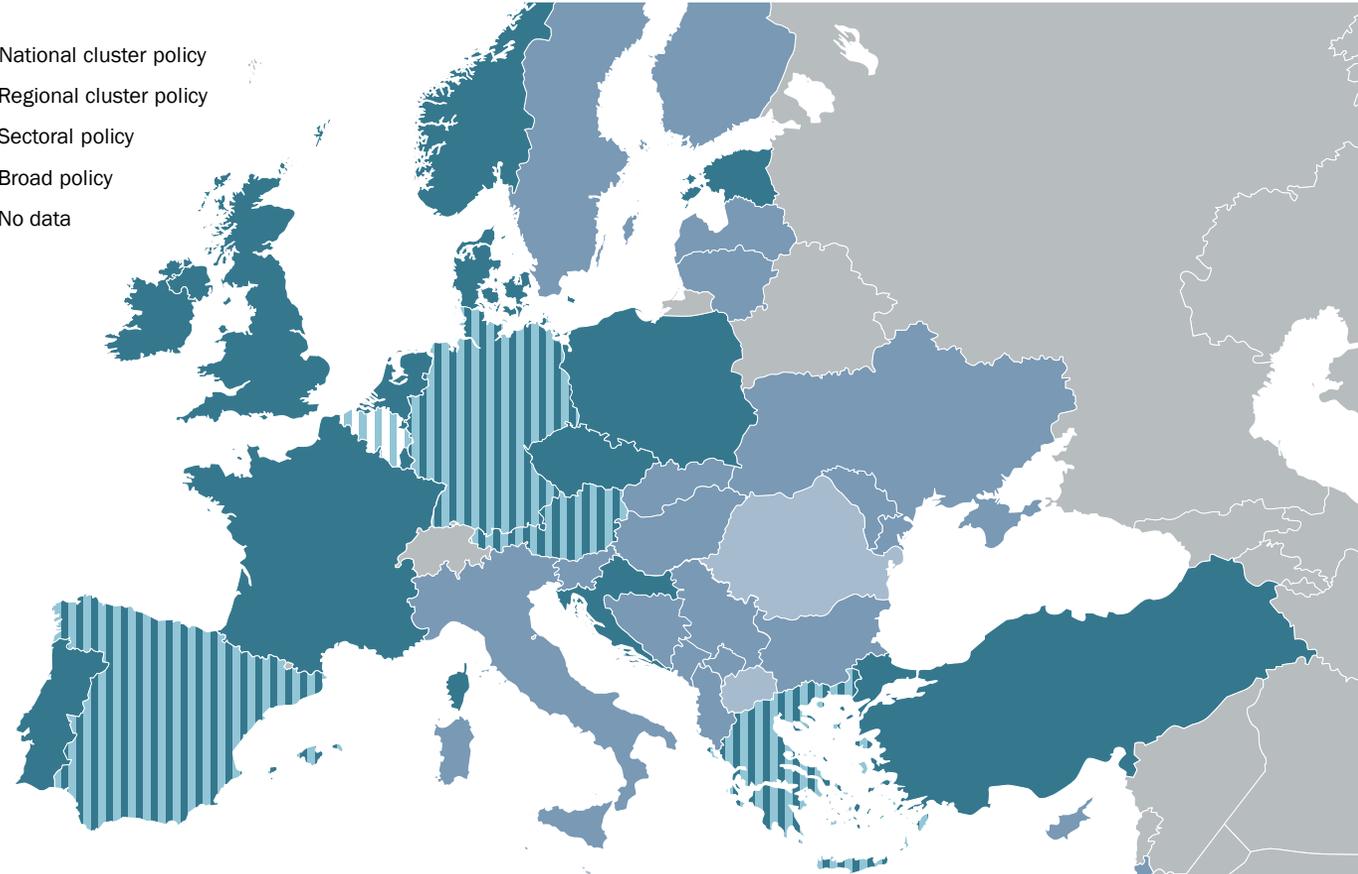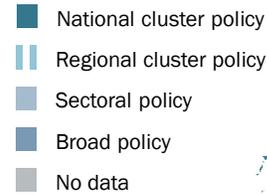
Legend:
- National cluster policy
- Regional cluster policy
- Sectoral policy
- Broad policy
- No data

Source: ECCP (2022), based on information gathered through desk research and validation by National Authorities.
N1 = 90 policies, N2 = 56 countries

Policy objectives per policy type

- National cluster policies focus on **cluster-specific objectives** – but:

  → **Creation of new clusters** is an objective *across* policy types

- **General business & innovation support** is served by both cluster and broader policies

- **Broader socio-economic objectives** are predominantly found in broad policies

Policy objective	National cluster policy	Regional cluster policy	Sectoral policy	Broad policy
Enhancing the visibility of clusters	53%	16%	12%	19%
Supporting cluster excellence and professionalisation of cluster…	51%	9%	11%	29%
Supporting the consolidation of existing cluster organisations	49%	11%	6%	34%
Strengthening the network of cluster organisations/cross-clustering	46%	8%	10%	36%
Cluster analysis and support for policymaking	42%	11%	11%	37%
Fostering innovation and strengthening innovation ecosystems	39%	11%	9%	41%
Strengthening cooperation between companies or industry and RTDI…	38%	11%	8%	43%
Fostering R&D activities, technology development and implementation	38%	11%	9%	42%
Promoting entrepreneurship, start-ups and spin-offs	35%	9%	6%	50%
Increase supply chain resilience	35%	5%	8%	51%
Supporting internationalisation activities	35%	11%	8%	46%
Increasing competitiveness and boosting scale up of SMEs	35%	9%	10%	46%
Promoting resilience and sustainable economy and other solidarity-…	34%	8%	14%	44%
Promoting employment and upgrading skills and competences	31%	10%	10%	50%
Enhancing territorial cohesion (through RIS3)	26%	9%		65%
Supporting the creation of new cluster organisations	25%	8%	14%	53%

■ National cluster policy ■ Regional cluster policy ■ Sectoral policy ■ Broad policy

Source: ECCP (2022), based on information gathered through desk research and validation by National Authorities. N = 90 policies.

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National Recovery and Resilience Plans

- 17 EU Member States name clusters in their NRRP

- *Example Spain*: Promote clusters of the Associations of Innovative Companies to modernize companies and to offer trainings for managers

Partnership Agreements (ERDF)*

- 11 EU Members States name clusters in their Partnership Agreements

- *Example Denmark:* Cluster development for internat. cluster-to-cluster cooperation & creation of synergies with Eurocluster initiative

Countries where clusters are part of the national Recovery and Resilience plans

Countries where clusters are part of the ERDF Partnership Agreements

Countries where clusters are part of the national Recovery and Resilience plans and ERDF Partnership Agreements
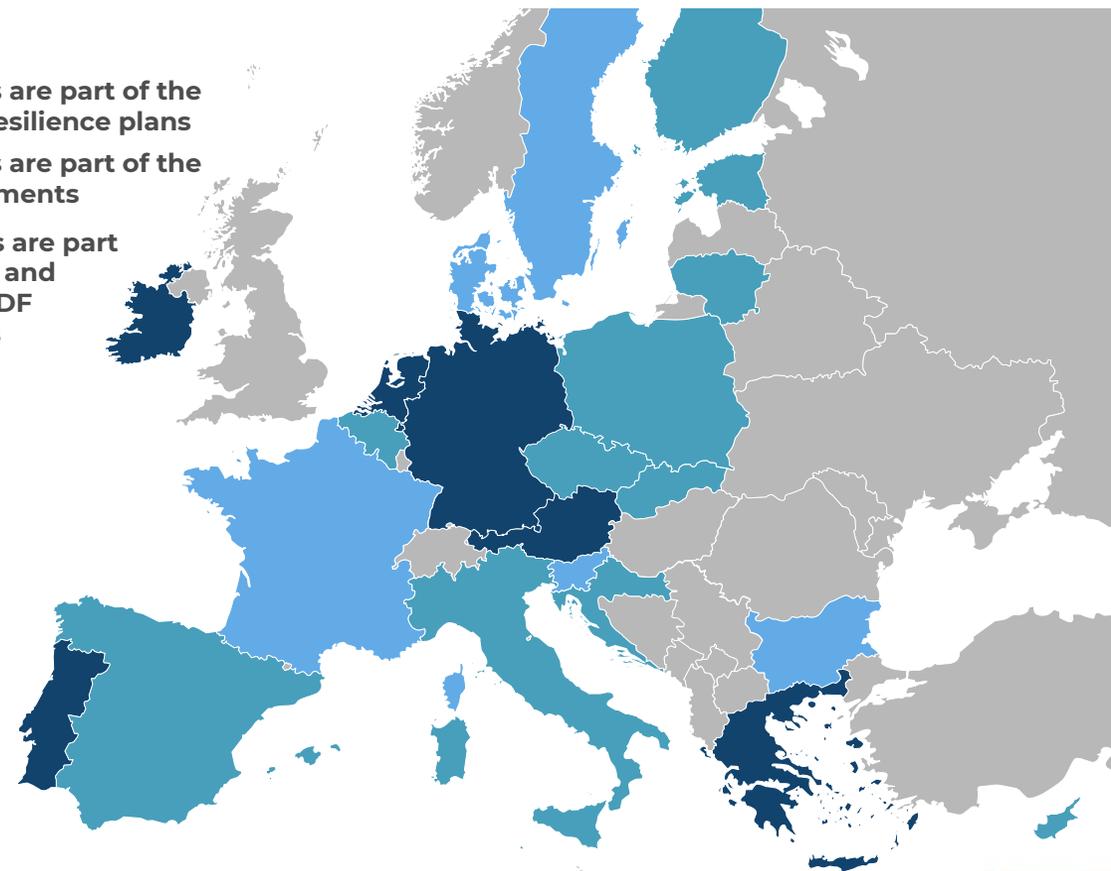
* Does not refer to ERDF operational programmes

Cluster policy approach by country type

19 (33%)

28 (50%)

9 (16%)

- Broad policy
- Sectoral policy
- National and/or regional cluster policy

Majority of the 56 analysed countries (50%) have a national and/or regional cluster policy in place

Broad policy represented in 8 EU countries (SE, FI, BG, CY, LT, LV, SI, SK)

14 EU MS have more than 10 years of experience in implementing cluster policies
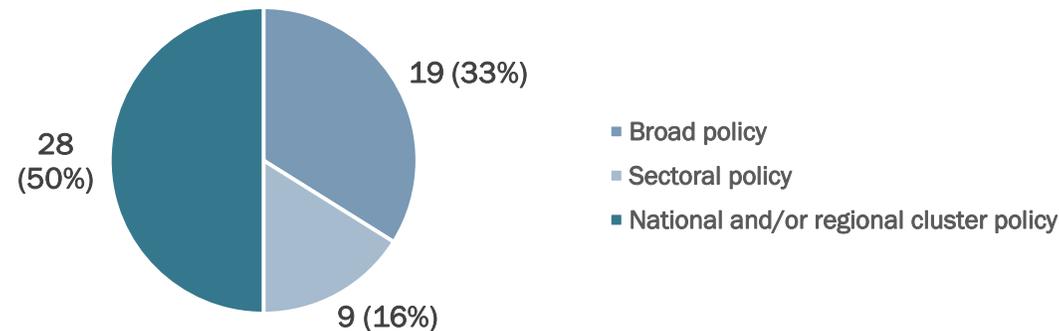
Cluster policy continuity by country type
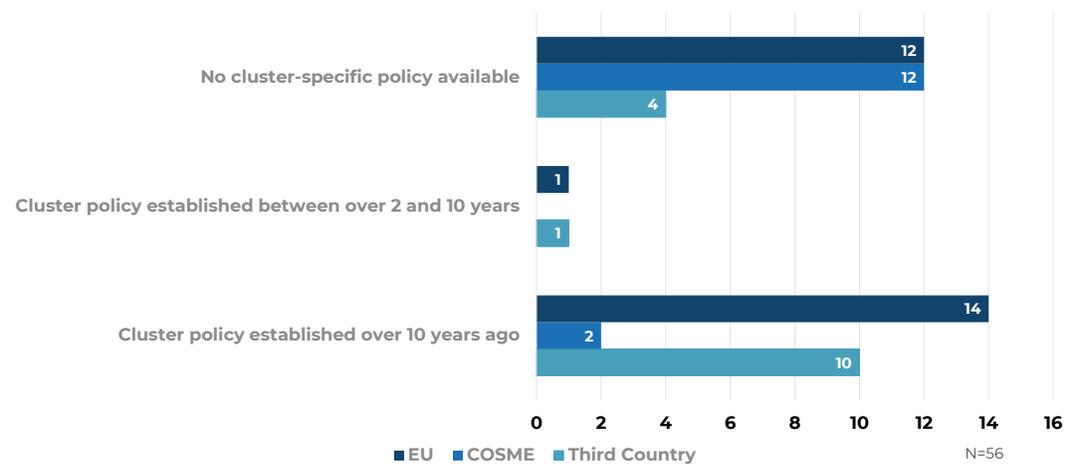
No cluster-specific policy available — 12 / 12 / 4

Cluster policy established between over 2 and 10 years — 1 / 1

Cluster policy established over 10 years ago — 14 / 2 / 10

0 2 4 6 8 10 12 14 16

■ EU ■ COSME ■ Third Country

N=56

Source: ECCP (2022), based on information gathered through desk research and validation by National Authorities.

Cluster support instruments by country type

- Financial or Technical support for cluster development in the broader and / or sectoral policy
  - EU: 11
  - COSME: 11
  - Third country: 4
- Financial and/or technical support for cluster development in dedicated cluster policy
  - EU: 16
  - COSME: 2
  - Third country: 12

Legend: ■ EU ■ COSME ■ Third country
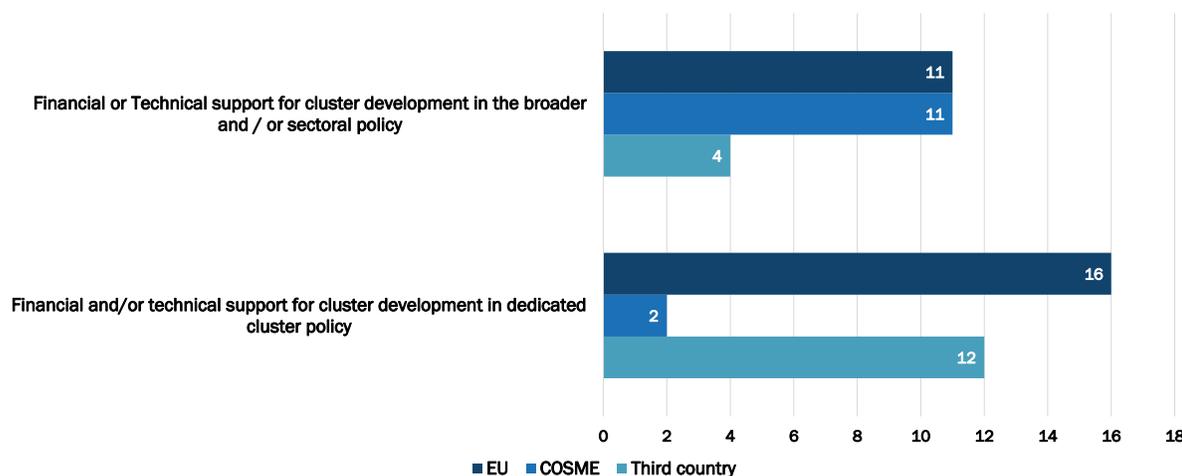
- • All 56 countries provide technical and / or financial support for cluster development
- • 81% of EU countries provide financial and technical support as part of their national cluster policy

- • Seven EU countries have a monitoring and evaluation ongoing for their cluster policies
- • 23% have no monitoring or evaluation at all

## Evidence of performance by country type

- No evaluation and / or monitoring available
  - EU: 6
  - COSME: 3
  - Third country: 4
- Existence of evaluations of past policies
  - EU: 7
  - COSME: 4
  - Third country: 3
- Existence of monitoring or an ongoing / interim evaluation
  - EU: 4
  - COSME: 2
  - Third country: 4
- Existence of monitoring and ex-ante or ongoing / interim evaluation
  - EU: 7
  - COSME: 1
  - Third country: 2

Legend: ■ EU ■ COSME ■ Third country

N=56

Source: ECCP (2022), based on information gathered through desk research and validation by National Authorities.

Source: ECCP (2022), based on information gathered through desk research and validation by National Authorities.

Cluster Policy Maturity Scoring 2022, by region

● EU27 ◆ COSME ▲ 3rd countries

- Policy approach
- Cluster policy continuity
- Evidence of performance
- Cluster support instruments

0   1   2
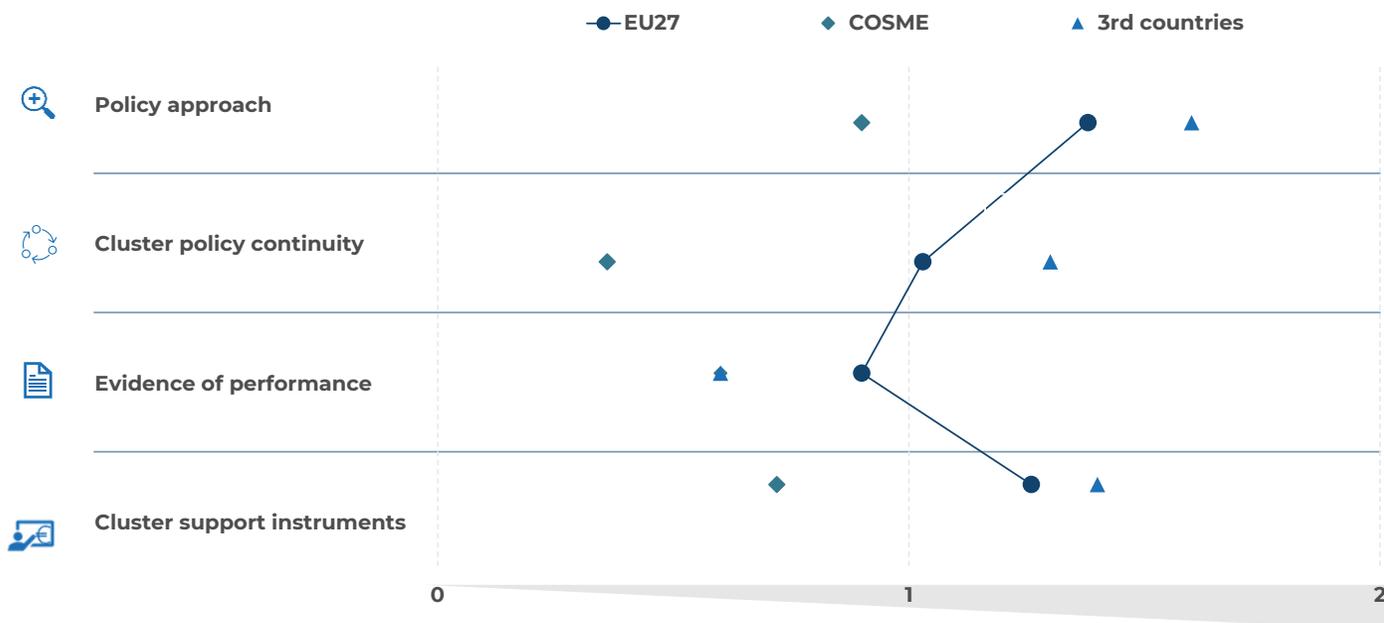
- Five European countries with **full maturity scores** in all four dimensions are (8 points):

  1. France
  2. Germany
  3. Portugal
  4. Netherlands
  5. Norway

- Majority of countries have a dedicated cluster policy at the **national level** and **more than 10 years of experience** in their implementation

- 20% of countries have policies that are **monitored** and have either been **evaluated** ex-ante or as ongoing / interim evaluation.

- Cluster organisation presence positively linked to **various aspects of regional competitiveness** and especially to indicators that measure **digital** competencies.

- Majority of significant relations between the no. of cluster organisations & regional competitiveness are found for "**Intermediate performance**" and "**Outcome**" indicators

- Even more regional competitiveness indicators have a significant relation to cluster presence measured by **regional & industry relevant nodes.**

- But: negative effect of cluster presence on the **environment** (Higher numbers of regional & industry relevant nodes linked to higher levels of air emission)

Dimension	Indicator	Cluster Organisations	Regional relevant nodes	Industry relevant nodes
Outcome indicators	GDP per Capita	+		+
	Sales of new-to-market & new-to-enterprise product innovations as percentage of total turnover		-	
	Employment in technology & knowledge-intensive sectors	+	++	++
	Share of ICT in GVA	+	+	++
	Air emissions in fine particulates (PM2.5) in Industry		+	+
Intermediate performance indicators	Gross fixed capital formation			
	Apparent labour productivity	+		+
	Employment rate		+	
	PCT patents per million population	+		+
	Green PCT patents			
	ICT patents	+		+
Firms' behaviour	Business R&D expenditure	++	+	+
	Innovative SMEs collaborating with others		-	
	SMEs that introduced a business process innovations		-	
	SMEs that introduced a product innovation			
	Public-private co-publications			+
	Employed ICT specialists	+	+	++
	Green Employment		++	
Business Environment	Public R&D expenditure	+		+
	Quality of Government Index			
	Birth of enterprises		+	+
	Survival rate of enterprises		-	
	Individuals who have above basic overall digital skills			-
	Human resources in science & technology	+	+	+
	Number of recovery & recycling facilities		+	

Legend

++	Positive correlation	- -	Negative correlation
+	Weak positive correlation	-	Weak negative correlation

Recommendation 1: Enable EU27 policy makers to further elaborate their cluster policies through exchange of good practices (e.g. ECCP Policy Toolkit).

Recommendation 2: Improve monitoring and evaluation of cluster policies and cluster-relevant policies to further refine future national / regional cluster support.

Recommendation 3: Increase involvement of the start-up community und innovation hub scene into the activities of cluster organisations.

Recommendation 4: Development of sustainable cluster business models for the financing of cluster organisations independently from public financing support.

Recommendation 5: Consider geographical diversity and access for "newcomers" in EU cluster partnerships to diversify the EU cluster landscape

Recommendation 6: Further alignment of national / regional cluster policies with the European Commission priorities.
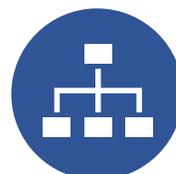
Recommendation 7: Better coordination between different authorities (e.g. national and regional ministries) involved in cluster policy implementation to increase synergies.

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Thank you!

Any questions?

Panel debate

Alberto Pezzi, Senior Manager, ACCIÓ

Agata Wancio, Deputy Director, Innovation and Industrial Policy Department, Ministry of Economic Development and Technology (Poland)

Antonio Novo, President, European Clusters Alliance

Bianca Muntean, Cluster Manager, Transilvania IT Cluster

FUNDING EXAMPLES

National cluster funding in Spain: "Programme to support Innovative Business Associations"

- Managed by the Ministry of Industry, Trade and Tourism

- Three supported activities

  - Strand 1. Support for organisational and coordination structures for clusters (with max. 4 years of age)

  - Strand 2. Feasibility studies, with the aim to prepare for other (European) calls

  - Strand 3. Digital transformation

- Possible consortia

  - Project developed by the cluster organisation itself

  - Between at least 3 SMEs plus the cluster organisation

  - Between at least 2 cluster organisations

- Budget

  - Regular budget: around 8 million EUR

  - Extraordinary RRF budget 2022: 50 million EUR

National cluster funding in Poland under "European Funds for Modern Economy"

- In September 2022, operational programme "European Funds for Modern Economy" (FENG) funded by the European Regional Development Fund in 2021-27 was adopted

- Explicit reference to supporting clusters under its priority "2. Business environment supporting innovation"

- Calls will be launched in 2023

Development of enterprises through support for clusters.

Support for clusters under the Programme focuses on National Key Clusters and supra-regional growth clusters. It is primarily planned to strengthen human and infrastructural resources, test new services, build platforms and internationalisation. The support is adapted to the level of cluster development and is related to the implementation of new services by clusters for companies.

Register for the next Talks

After a Christmas break, we will return in January!

11 January 2023: SME "Relief Package"

25 January 2023: Transition Pathway for Aerospace and Defence

8 February 2023: HERA and health emergency preparedness in Europe

22 February 2023: Transition Pathway for Mobility

We value your feedback

Please fill in the feedback survey until 30th December:

https://ec.europa.eu/eusurvey/runner/EUClustersTalks

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Register on the European Cluster Collaboration Platform!

https://clustercollaboration.eu/

Strengthening the European economy through collaboration

The European online hub for industry clusters

Strengthening the European economy through collaboration
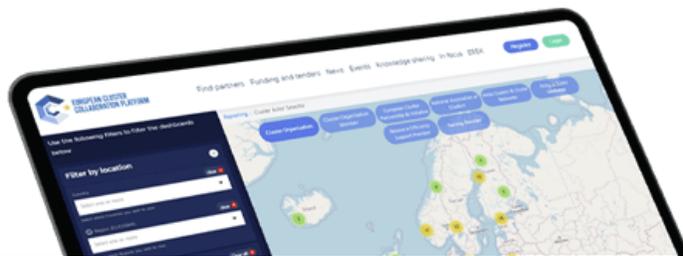
Find partners per country, region, sector or industrial ecosystem