

European Cluster Observatory  
REPORT

# Cluster Programmes in Europe

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This report represents an update of the draft presented by the Commission Service at the Competitiveness and Growth Working Party meeting of the Competitiveness Council on 04.05.2015.

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## European Cluster Observatory in Brief

The European Cluster Observatory is a single access point for statistical information, analysis and mapping of clusters and cluster policy in Europe that is foremost aimed at European, national, regional and local policy-makers as well as cluster managers and representatives of SME intermediaries. It is an initiative of the “Clusters, Social Economy and Entrepreneurship” unit of the European Commission’s Internal Market, Industry, Entrepreneurship and SMEs Directorate-General that aims at promoting the development of more world-class clusters in Europe, notably with a view to fostering competitiveness and entrepreneurship in emerging industries and facilitating SMEs’ access to clusters and internationalisation activities through clusters.

The ultimate objective is to help Member States and regions in designing smart specialisation and cluster strategies to assist companies in developing new, globally competitive advantages in emerging industries through clusters, and in this way strengthen the role of cluster policies for the rejuvenation of Europe’s industry as part of the Europe 2020 Strategy.

To support evidence-based policy-making and partnering, the European Cluster Observatory provides an EU-wide comparative cluster mapping with sectoral and cross-sectoral statistical analysis of the geographical concentration of economic activities and performance. The European Cluster Observatory provides the following services:

- a **bi-annual “European Cluster Panorama”(cluster mapping)** providing an update and enrichment of the statistical mapping of clusters in Europe, including for ten related sectors (i.e. cross-sectoral) and a correlation analysis with key competitiveness indicators;
- a **“European Cluster Trends” report** analysing cross-sectoral clustering trends, cluster internationalisation and global mega trends of industrial transformations; identifying common interaction spaces; and providing a foresight analysis of industrial and cluster opportunities;
- a **“Regional Eco-system Scoreboard”** setting out strengths and weaknesses of regional and national eco-systems for clusters, and identifying cluster-specific framework conditions for three cross-sectoral collaboration areas;
- a **“European Stress Test for Cluster Policy”**, including a self-assessment tool accompanied by policy guidance for developing cluster policies in support of emerging industries;
- **showcase modern cluster policy practice through advisory support services to six selected model demonstrator regions**, including expert analysis, regional survey & benchmarking report, peer-review meeting, and policy briefings in support of emerging industries. The policy advice builds also upon the policy lessons from related initiatives in the area of emerging industries;
- bring together **Europe’s cluster policy-makers and stakeholders at the European Cluster Conferences** 2014 and 2016 for a high-level cluster policy dialogue and policy learning, and facilitate exchange of information through these webpages, newsletters, videos, etc.

More information about the European Cluster Observatory is available at the EU Cluster Portal at: <http://ec.europa.eu/growth/smes/cluster/observatory/>

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## 1. Introduction

In 2008, the first structured survey of regional and national cluster programmes in Europe was conducted under the Europe INNOVA scheme (European Commission 2008)<sup>1</sup>. More than 69 national and 88 regional programmes in 26 out of the 31 European countries have been surveyed at that time. The majority of the countries had one or two national programmes in place. The main outcome was that almost all countries had cluster programmes at national and/or regional level in place. However, cluster policy at that time was only at an early stage in many countries. Around half of the participating countries first started applying cluster policy after 1999.

By today's perspective, it is interesting to notice that with some exceptions, clusters at that time did not play an important role as framework for national policy related to innovation and technology, regional economic development and entrepreneurship as well as to SMEs. The areas where clusters played the most prominent role were science and education.<sup>1</sup> The majority of the cluster programmes did not have a particular focus on clusters in a certain life cycle. Instead, they simply supported any kind of clusters. The programmes that focussed on particular life cycles tended to concentrate on embryonic clusters at an early stage.

The next pan-European survey on national and regional cluster programmes was initiated in 2011 and published in 2012. It was conducted in a more structured way in order to compare the main programme design features among the participating programmes.<sup>2</sup> 34 cluster programmes of 24 countries have been included in the cluster programme benchmarking activities. Common to all programmes at that time was their rationale of increasing the competitiveness of the national or regional economy through the facilitation of collaboration between companies and research stakeholders. Most of the programmes had a national perspective, while a few focussed on the promotion of regional systems of innovation. The diverse set of overall objectives also reflected different types of cluster programmes, each of them serving a specific purpose.

The survey has yielded twelve key findings which provided further insight in the specific characteristics of the different cluster programmes and gave guidance for the future development of cluster programmes:

- Different types of cluster programmes served different purposes.
- Most cluster programmes were ranked high on the government's agenda.
- Coordination with other funding programmes showed room for improvement.
- Internationalisation of clusters was considered to be important, but the relevance varied between the different programmes.
- Programme owners took over a more active role towards developing individual clusters.
- Cluster management excellence has become increasingly important in recent years.

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<sup>1</sup> European Commission (2008). *Cluster Policy in Europe – A brief survey of cluster programmes in 31 European countries*. Oxford Research, 2008. Available at: <http://www.clusterobservatory.eu/system/modules/com.gridnine.opencms.modules.eco/providers/getpdf.jsp?uid=100146>. Accessed on 23 March 2015.

<sup>2</sup> Müller, L., Lämmer-Gamp, T., Meier zu Köcker, G., Christensen, T. (2012). *Clusters are Individuals, Vol. II, New Findings from the Clustermanagement and Clusterprogramme Benchmarking*. Berlin: VDI/VDE-IT GmbH, 2012. Available at: <http://www.cluster-analysis.org/downloads/ClustersareIndividualsVolumellAnnex.pdf>. Accessed on 23 March 2015.

- Monitoring and evaluation was important but difficult.
- Cluster policy has become more important with the EU enlargement.
- The European Regional Development Fund had led to good linkages between innovation support programmes and cluster programmes.
- Independent from the kind of support they provided, cluster programmes were equally integrated in national policies.
- The cluster programmes' strategic focus on either launching new clusters or supporting matured clusters on their way towards excellence was equally integrated in the policy agendas of the EU Member States
- The budget provided for cluster programmes was independent from the country's Gross Domestic Product (GDP).

The current study was conducted under the European Cluster Observatory in 2015 and can thus be considered as a continuation of surveying and benchmarking cluster programmes at national and regional level within Europe. As the economic and innovation-related framework conditions have significantly changed over the recent past, the focus of cluster policy and related programmes have also developed further.

Nowadays, increased importance is given to Emerging Industries, the new nature of innovation, the need of cross-sectoral cooperation, and the increasing convergences of technologies. During the last years, many regions have developed their Smart Specialisation Strategies to guide innovation-related investments under the European Structural and Investment Fund. The current cluster support schemes reflect these regional strategies.

This document provides a snapshot of the respective programmes. Due to the fact that the next period of European Structural and Investment Fund has just started, some countries did not yet have respective programmes in place and thus were not able to participate in this round (e.g. Poland). Thus, this document can be considered as a "living document", which will be updated by the European Cluster Observatory.

## 2. Examined Cluster Programmes

All European countries were invited to join the cluster programme benchmarking. Currently, there are three groups of countries related to national cluster policies and respective programmes. The first group includes countries such as Finland, United Kingdom, the Netherlands or Italy that do not have cluster programmes at national level in place. The second group includes countries that are currently revising their national cluster policies and programmes. They will have new programmes in place later this year and might join in the next update of this report. A typical example is Poland. The third group includes countries with dedicated policies and programmes in place. From this group, 16 national cluster programmes from 15 countries including Austria, Bulgaria, Czech Republic, Denmark, France, Germany, Greece, Latvia, Montenegro, Norway, Portugal, Romania, Slovakia, Sweden and Turkey participated in the current cluster programme benchmarking.

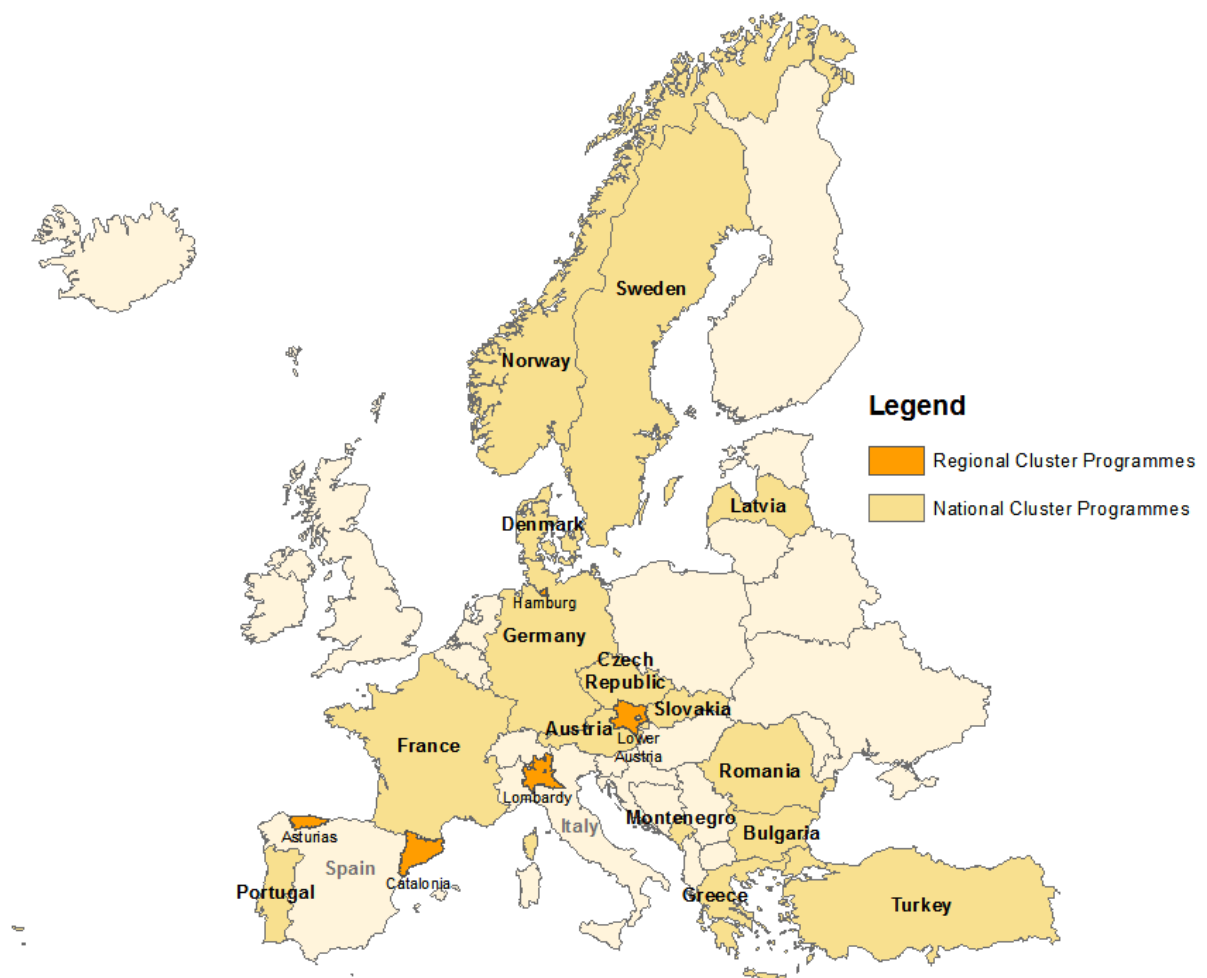
In addition, twelve regions with important cluster programmes were invited to join the cluster programme survey. These regions include the six Model Demonstrator Regions of the European Cluster Observatory and the six regions supported within the "Clusters and Entrepreneurs in Emerging Industries". Ultimately, five regions replied. These are Asturias (Spain), Catalonia (Spain), Hamburg (Germany), Lombardy (Italy) and Lower-Austria (Austria).

Compared to previous surveys fewer countries have dedicated cluster policies or programmes in place. This does not mean that the importance of clusters has decreased. Instead, these countries use clusters as a mean to implement their regional development strategies, and they do not provide dedicated support or funding of cluster initiatives at national level. Examples for this trend are Finland or the Netherlands.

Some countries, such as Montenegro, participated in this cluster programme benchmarking for the first time.

The related programmes cover a wide array of different rationales, objectives and instruments, but have the development of clusters through the support of cluster management organisations in common.

Figure 1: Participating countries











## 2.1 General Information











### 2.1.1 Overall Objectives of the Covered Cluster Programmes






The 16 national and 5 regional selected cluster programmes covered by this report (Table 1) are very different when it comes to the design, featuring a diverse set of overall objectives. Common to all programmes is their rationale of increasing the competitiveness of the national or regional economy through the facilitation of collaboration between companies and research stakeholders. The diverse set of overall objectives also reflects different types of cluster programmes, each of them serving a specific purpose.

Table 1: Key objectives of the cluster programmes<sup>3</sup>

National Cluster Programmes		
Country	Programme name and website	Overall objectives
 Austria	National Cluster Platform Austria (NCPA) <a href="http://www.clusterplattform.at/index.php?id=1&amp;L=1">http://www.clusterplattform.at/index.php?id=1&amp;L=1</a>	<ul style="list-style-type: none"> <li>• Increase the influence of regional clusters in Austrian innovation policy</li> <li>• Provide an interface towards European opinion-forming and programme participation</li> </ul>
 Bulgaria	Operational Programme “Innovation and Competitiveness” (OPIC) <a href="#">(website not available)</a>	<ul style="list-style-type: none"> <li>• Achievement of dynamic and competitive economy through the development of innovation, entrepreneurship, growth capacity of small and medium-sized enterprises (SME), energy and resource efficiency of enterprises</li> </ul>
 Czech Republic (CZ)	Clusters – Cooperation <a href="http://www.mpo.cz">www.mpo.cz</a>	<ul style="list-style-type: none"> <li>• Support of the cooperation of the clusters</li> <li>• Internationalisation</li> <li>• Development of clusters</li> <li>• R &amp; D activities</li> </ul>
 Denmark (DK)	Innovation Networks Denmark <a href="http://ufm.dk/en/research-and-innovation/cooperation-between-research-and-innovation/collaboration-between-research-and-industry/innovation-networks-denmark">http://ufm.dk/en/research-and-innovation/cooperation-between-research-and-innovation/collaboration-between-research-and-industry/innovation-networks-denmark</a>	<ul style="list-style-type: none"> <li>• Strengthening the research, development and innovation activities of Danish companies.</li> <li>• Strengthening interaction between private companies and publically supported knowledge institutions</li> </ul>
 France (FR)	Pôles de Compétitivité <a href="http://www.competitivite.gouv.fr">www.competitivite.gouv.fr</a>	<ul style="list-style-type: none"> <li>• Extend the clusters’ mission to bringing R&amp;D projects to market</li> <li>• Increase cluster support to SME ecosystems through contacts with investors, anticipation of skills needs, export capacity development</li> <li>• Focus financing towards more productive clusters for a better efficiency of clusters’ policy</li> </ul>
 Germany (DE)	go-cluster <a href="http://www.clusterplattform.de/CLUSTER/Navigation/DE/Bund/go-cluster/go-cluster.html">http://www.clusterplattform.de/CLUSTER/Navigation/DE/Bund/go-cluster/go-cluster.html</a>	<ul style="list-style-type: none"> <li>• Support the transformation of the most efficient national innovation clusters into international clusters of excellence</li> <li>• Promote new cluster services to stimulate cluster managers to offer new services</li> <li>• Increase international visibility of participating innovation clusters</li> <li>• Analyse trends of international cluster policy to work out recommendations for the German perspective</li> </ul>

<sup>3</sup> detailed technical information about the programmes to be found in the appendix

National Cluster Programmes		
Country	Programme name and website	Overall objectives
 Germany (DE)	Leading Edge Cluster Competition <a href="http://www.bmbf.de/en/20741.php">http://www.bmbf.de/en/20741.php</a>	<ul style="list-style-type: none"> <li>Strengthen cooperation between industry and science</li> <li>Make location more attractive – for skilled personnel, for investors and for those involved locally</li> </ul>
 Greece (GR)	mi-Cluster Development <a href="http://www.corallia.org">www.corallia.org</a>	<ul style="list-style-type: none"> <li>Large-scale intervention, with the objective to develop a cohesive and productive innovation ecosystem in the microelectronics and embedded systems sector in Greece</li> </ul>
 Latvia (LV)	OP Cluster Programme (EC) <a href="http://www.liaa.gov.lv">www.liaa.gov.lv</a>	<ul style="list-style-type: none"> <li>Preparation and implementation of efficient cluster development strategies, including implementation of joint projects</li> </ul>
 Montenegro (ME)	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development <a href="http://www.unido.org">www.unido.org</a>	<ul style="list-style-type: none"> <li>Enhancing competitiveness and market access of cluster SMEs and network in Montenegro</li> </ul>
 Norway (NO)	Norwegian Innovation Clusters <a href="http://www.innovationnorway.no">www.innovationnorway.no</a>	<ul style="list-style-type: none"> <li>Enhancing growth by generating and reinforcing collaboration-based innovation and internationalisation processes within clusters with clear ambitions and growth potential</li> </ul>
 Portugal (PT)	Competitiveness Clusters <a href="http://www.iapmei.pt/">http://www.iapmei.pt/</a>	<ul style="list-style-type: none"> <li>Support cluster policy, now strategically oriented for the consolidation or creation of competitiveness clusters</li> <li>Mobilisation of economic actors for collaborative knowledge sharing</li> </ul>
 Romania (RO)	Operational Programme Competitiveness <a href="http://www.poscce.research.ro">http://www.poscce.research.ro</a>	<ul style="list-style-type: none"> <li>Increasing private investment in R &amp; D,</li> <li>Increasing knowledge transfer, technology and competent staff CDI between private and public sector,</li> <li>Increasing scientific capacity as a driver of innovation,</li> <li>Increasing the participation of Romanian research in European and international research</li> </ul>
 Slovakia (SK)	Clusters Scheme <a href="http://www.mhsr.sk">www.mhsr.sk</a>	<ul style="list-style-type: none"> <li>Upgrading the competitiveness of industrial clusters members by streamlining their cooperation, as well as strengthening industrial clusters internationally</li> </ul>
 Sweden (SE)	Sweden <a href="http://www.vinnova.se/en/Our-activities/Innovativeness-of-specific-target-groups/Individuals-and-Innovation-Milieus/VINNVAXT/">http://www.vinnova.se/en/Our-activities/Innovativeness-of-specific-target-groups/Individuals-and-Innovation-Milieus/VINNVAXT/</a>	<ul style="list-style-type: none"> <li>Support the development of strong research and innovation environments</li> <li>Stimulate systems of actors to enhance the innovation system in Swedish functional regions to an international level within specific areas of strength</li> <li>Be a catalyst for coordination of resources</li> </ul>
 Turkey (TR)	Cluster Support Programme <a href="https://kumelenme.sanayi.gov.tr/Default.aspx">https://kumelenme.sanayi.gov.tr/Default.aspx</a>	<ul style="list-style-type: none"> <li>Support cluster initiatives bearing a particular potential of competitiveness and sustainability</li> </ul>

Regional Cluster Programmes		
Region	Name of the programme and website	Overall objectives
 <b>Lower Austria (AT)</b>	Cluster Programme Lower Austria  <a href="http://www.ecoplus.at/en/ecoplus/cluster">www.ecoplus.at/en/ecoplus/cluster</a>	<ul style="list-style-type: none"> <li>• In-depth ex ante mapping of cluster potentials and the relevance for the regional value chain,</li> <li>• Identification and development of emerging topics within the clusters</li> <li>• Cluster management by the “umbrella” cluster organisation ecoplus</li> <li>• Continuous monitoring of the performance and new developments</li> </ul>
 <b>Region Lombardy (IT)</b>	Support activities for the development of the tools foreseen by S <sup>3</sup> of Regione Lombardia  <a href="http://www.finlombarda.it">www.finlombarda.it</a>	<ul style="list-style-type: none"> <li>• Strengthening the role of the cluster as facilitator to boost the competitiveness of Lombard companies</li> <li>• Steady their role as intermediate governance also within the RIS3 implementation process</li> </ul>
 <b>Region Hamburg (DE)</b>	Hamburg’s cluster policy - Reaching the top together  <a href="http://metropolregion.hamburg.de/wirtschaft/">http://metropolregion.hamburg.de/wirtschaft/</a>	<ul style="list-style-type: none"> <li>• Tap the potential we of the creative sector, healthcare, maritime industry and renewable energies through cluster policy</li> </ul>
 <b>Region Catalonia (ES)</b>	Catalonia Clusters Programme  <a href="http://www.acc10.cat">www.acc10.cat</a>	<ul style="list-style-type: none"> <li>• Systematise the action of the Catalan government in the field of cluster policy.</li> <li>• Contribute to rationalise the map of existing cluster organisations.</li> </ul>
 <b>Region Asturias (ES)</b>	Clusters Asturias  <a href="http://www.idepa.es">www.idepa.es</a>	<ul style="list-style-type: none"> <li>• Strengthen Innovative Groups, turning them into an invaluable tool for achieving greater integration and structuring of the Regional System for Innovation</li> <li>• Promoting cluster excellence (training, benchmarking)</li> <li>• Encourage internationalisation</li> </ul>

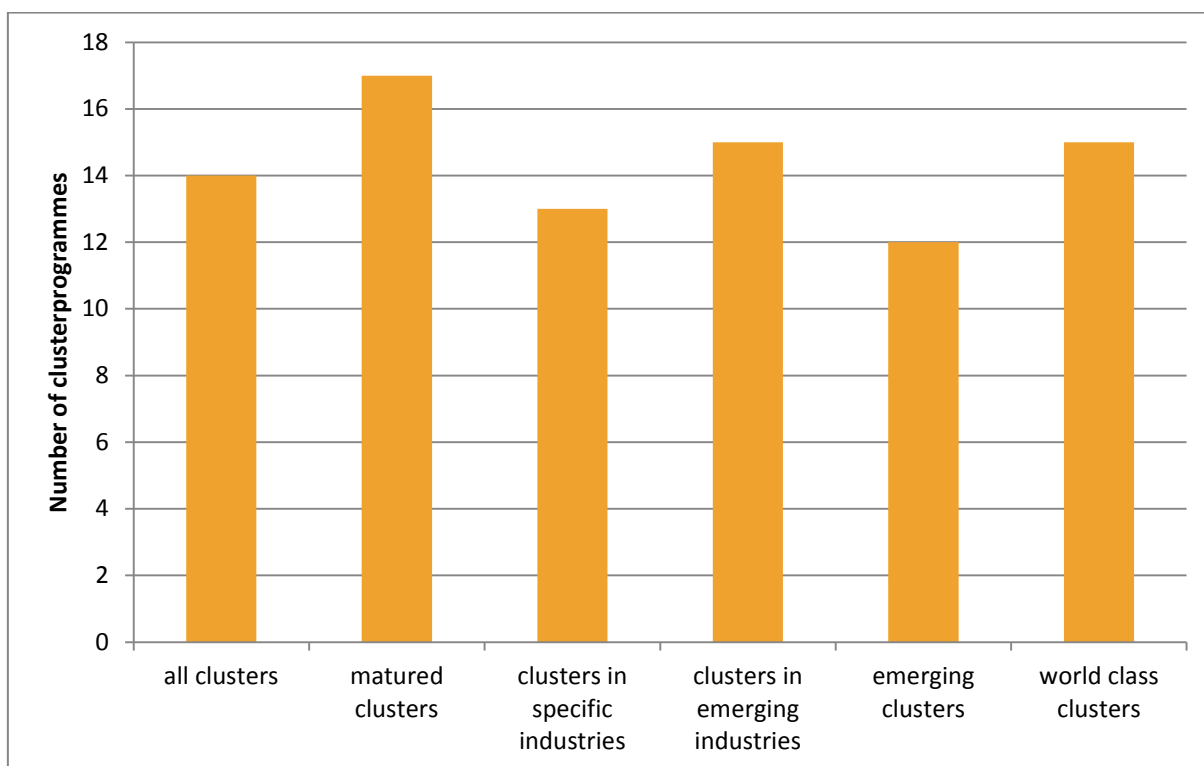
### 2.1.2 Targeted Clusters

Figure 2 and Table 2 display the type of clusters targeted in the different programmes. A powerful shift compared to the previous surveys conducted in 2008 and 2012 can be found. Compared to the previous surveys, nowadays the majority of the programmes - especially those at national level - focus on matured clusters and clusters striving for world class.

Less national programmes, compared to the past, are supporting all types of clusters or emerging (embryonic) clusters. However, regional programmes tend to support all kind of clusters, what seems to be reasonable since a typical region consists of clusters at different maturity levels (e.g. Catalonia).











Although the topic of Emerging Industries is comparably young, it is interesting to see that the number of cluster programmes that provide dedicated support to clusters in Emerging Industries is increasing.<sup>4</sup> More than half of the surveyed programmes (15 out of 21) focus on Emerging Industries. This is a higher number than in the past.






Figure 2: Type of targeted clusters (21 programmes participated)



<sup>4</sup> European Cluster Observatory (2014). *European Cluster Panorama 2014*. Available at: [http://ec.europa.eu/growth/smes/cluster/observatory/cluster-mapping-services/cluster-mapping/cluster-panorama/index\\_en.htm](http://ec.europa.eu/growth/smes/cluster/observatory/cluster-mapping-services/cluster-mapping/cluster-panorama/index_en.htm). Accessed on 23 March 2015.

Table 2: Targeted clusters

Country	Name of the programme	All clusters	Matured clusters	Clusters in specific industries	Clusters in emerging industries	Emerging clusters (future high potentials)	World class clusters
 Austria	National Cluster Platform Austria (NCPA)	x	x	x	x	x	x
 Bulgaria	Operational Programme "Innovation and Competitiveness" (OPIC)		x	x	x	x	
 Czech Republic	Clusters - Cooperation	x	x	x	x	x	x
 Denmark	Innovation Networks Denmark		x	x	x		x
 France	Pôles de Compétitivité	x	x	x	x		x
 Germany	go-cluster		x		x		x
 Germany	Leading Edge Competition				x		x
 Greece	mi-Cluster Development		x	x		x	x
 Latvia	OP Cluster Programme		x	x		x	
 Montenegro	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	x	x	x			
 Norway	Norwegian Innovation Clusters		x		x	x	x
 Portugal	Competitiveness Clusters	x	x		x	x	x
 Romania	Operational Programme Competitiveness	x	x	x	x	x	x
 Slovakia	Clusters Scheme	x	x	x	x	x	x
 Sweden	Vinnväxt	x	x	x	x	x	x
 Turkey	Cluster Support Programme	x	x		x	x	

Region	Name of the programme	All clusters	Matured clusters	Clusters in specific industries	Clusters in emerging industries	Emerging clusters (future high potentials)	World class clusters
 Lower Austria (AT)	Cluster Programme Lower Austria	x					
 Lombardy (IT)	Support activities for the development of the tools foreseen by S <sup>3</sup> of Regione Lombardia	x			x		x
 Hamburg (DE)	Hamburg's cluster policy - Reaching the top together	x	x	x	x	x	x
 Catalonia (ES)	Catalonia Clusters Programme	x					
 Asturias (ES)	Clusters Asturias	x	x	x			x






### 3. Focus of the Programmes

#### 3.1 Strategic Approach of the Cluster Programmes Regarding the Development of Cluster Management Organisations

The previous survey of 2012 revealed that most cluster programmes supported both, the establishment of new cluster management organisations as well as the further development of already existing matured cluster management organisations. This picture has completely changed in recent years. Nowadays, almost all surveyed programmes strive to further develop and professionalise existing cluster managements and only a few, mainly catching-up countries, support the establishment of new cluster organisations due to the fact, that cluster management is a rather new topic in these countries.

Table 3: Strategic focus of the programmes

Country	Name of the programme	Establishment of new cluster management organisations	Further development of already existing matured cluster management organisations
 Austria	National Cluster Platform Austria (NCPA)		x
 Bulgaria	Operational Programme "Innovation and Competitiveness" (OPIC)	x	x
 Czech Republic	Clusters - Cooperation		x
 Denmark	Innovation Networks Denmark		x
 France	Pôles de Compétitivité		x
 Germany	go-cluster		x
 Germany	Leading Edge Competition		x
 Greece	mi-Cluster Development		x
 Latvia	OP Cluster Programme	x	x
 Montenegro	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	x	x
 Norway	Norwegian Innovation Clusters		x
 Portugal	Competitiveness Clusters	x	x
 Romania	Operational Programme Competitiveness	x	x
 Slovakia	Clusters Scheme		x
 Sweden	Vinnväxt	x	x
 Turkey	Cluster Support Programme	x	x

Region	Name of the programme	Establishment of new cluster management organisations	Further development of already existing matured cluster management organisations
 Lower Austria (AT)	Cluster Programme Lower Austria		x
 Lombardy (IT)	Support activities for the development of the tools foreseen by S3 of Regione Lombardia	x	x
 Hamburg (DE)	Hamburg's cluster policy - Reaching the top together		x
 Catalonia (ES)	Catalonia Clusters Programme		x
 Asturias (ES)	Clusters Asturias		x

## 3.2 Industrial Focus

Cluster programmes in Europe aim at increasing innovation capabilities and competitiveness especially of SMEs. When having a closer look at the programmes ten years ago, the focus was to have cluster (initiatives) available in all industrial sectors that were of relevance for a nation or region. This approach has changed since.

Today, the availability of clusters in important industrial sectors is of high relevance on political agendas. Moreover, it has become essential to enable cross-sectoral collaboration between cluster actors from different industries. Many programmes, e.g. the Czech cluster programme, pay high attention to this topic. Some programmes, e.g. the German go-cluster programme or the Catalonian Cluster Programme, do not only encourage but provide dedicated incentives for cross-sectoral cooperation.

Furthermore, the support of clusters in Emerging Industries has slightly increased during the recent past. However, it has to be taken into account, that there is still no consensus of what Emerging Industries are all about as the participating countries and regions have different views on that<sup>5</sup>. However, there is an increasing awareness that cluster programmes have to focus on these industries even more in the future, since innovations in these industries are more complex.<sup>6</sup> Accordingly, many cluster programmes actively support cluster organisations to better provide added value to SMEs<sup>7</sup> by developing new, tailor-made business services for SMEs, especially in the field of cross-sectoral coopera-

<sup>5</sup> The European Forum for Cluster in Emerging Industries defined in their „Policy Roadmap – Actions for new linkages needed“ emerging industries as „[t]he establishment of an entirely new industrial value chain, or the radical reconfiguration of an existing one, driven by a disruptive idea (or convergence of ideas), leading to turning these ideas / opportunities into new products / services with higher added value (based on Heffernan & Phall, 2009). See <http://www.clusterobservatory.eu/about-observatory/emerging-industrie/>

<sup>6</sup> European Cluster Observatory (2014). European Cluster Panorama 2014. Available at: [http://ec.europa.eu/growth/smes/cluster/observatory/cluster-mapping-services/cluster-mapping/cluster-panorama/index\\_en.htm](http://ec.europa.eu/growth/smes/cluster/observatory/cluster-mapping-services/cluster-mapping/cluster-panorama/index_en.htm). Accessed on 23 March 2015.

<sup>7</sup> European Cluster Observatory (2014). Cluster Collaboration and Business Support Tools to Facilitate Entrepreneurship, Cross-sectoral Cooperation and Growth. Available at: <http://ec.europa.eu/growth/smes/cluster/observatory/>. Accessed on 23 March 2015.



tion (Fig. 3). Especially, the more recent programmes put higher attention on cross-sectoral cooperation as well as on Emerging Industries than those that are a bit older.

Figure 3: Focus of the cluster programmes with regard to the support of SMEs

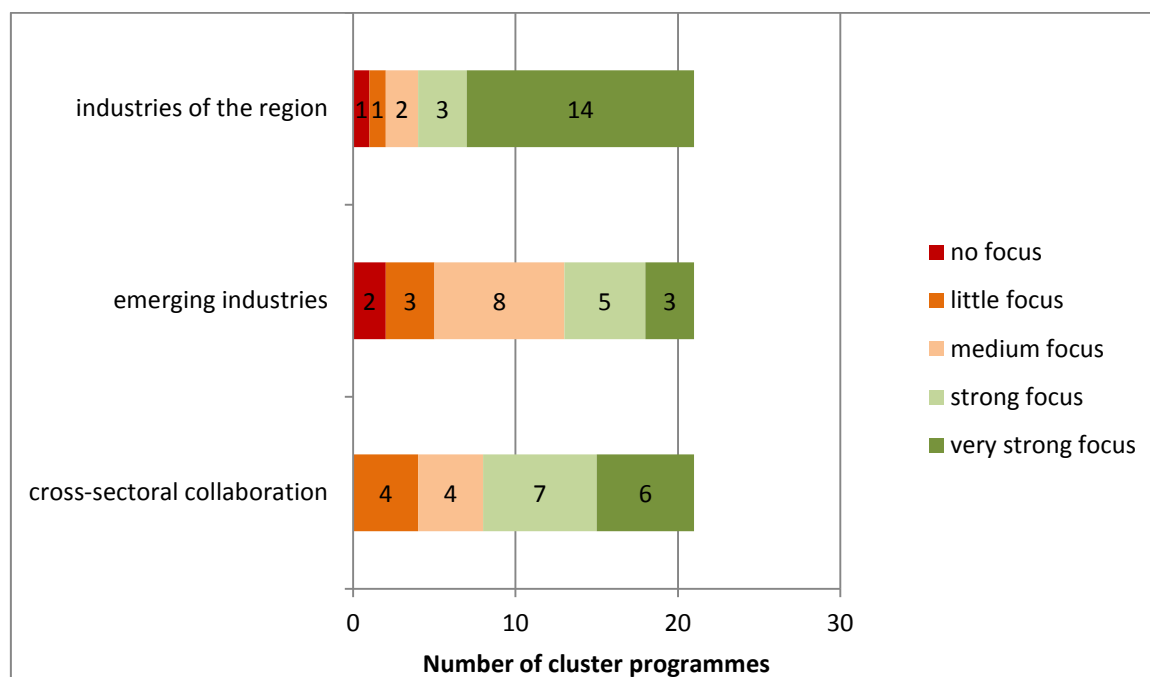


























































Table 4: Focus of the cluster programmes with regard to the support of SMEs

Country	Name of the programme	Industries of the region	Emerging industries	Cross-sectoral collaboration
Austria	National Cluster Platform Austria (NCPA)	very strong focus	very strong focus	very strong focus
Bulgaria	Operational Programme “Innovation and Competitiveness” (OPIC)	very strong focus	little focus	little focus
Czech Republic	Clusters – Cooperation	very strong focus	medium focus	very strong focus
Denmark	Innovation Networks Denmark	very strong focus	medium focus	strong focus
France	Pôles de Compétitivité	very strong focus	strong focus	medium focus
Germany	go-cluster	medium focus	medium focus	very strong focus
Germany	Leading Edge Cluster Competition	no focus	medium focus	little focus

Country	Name of the programme	Industries of the region	Emerging industries	Cross-sectoral collaboration
 <b>Greece</b>	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	 very strong focus	 medium focus	 medium focus
 <b>Latvia</b>	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Programme	 very strong focus	 medium focus	 little focus
 <b>Montenegro</b>	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	 very strong focus	 medium focus	 very strong focus
 <b>Norway</b>	Norwegian Innovation Clusters	 strong focus	 no focus	 medium focus
 <b>Portugal</b>	Competitiveness Clusters	 strong focus	 strong focus	 strong focus
 <b>Romania</b>	Operational Programme “Competitiveness” – OPC	 very strong focus	 strong focus	 strong focus
 <b>Slovakia</b>	De minimis scheme to support industrial clusters, Clusters Scheme	 medium focus	 little focus	 strong focus
 <b>Sweden</b>	VINNVÄXT Regional Growth through Dynamic Innovation Systems	 strong focus	 strong focus	 strong focus
 <b>Turkey</b>	Cluster Support Programme	 very strong focus	 very strong focus	 very strong focus
Region	Name of the programme	Industries of the region	Emerging industries	Cross-sectoral collaboration
 <b>Lower Austria (AT)</b>	Cluster Programme Lower Austria	 very strong focus	 strong focus	 strong focus
 <b>Lombardy (IT)</b>	Support activities for the development of the tools foreseen by S3 of Regione Lombardia	 very strong focus	 medium focus	 strong focus
 <b>Hamburg (DE)</b>	Hamburg’s cluster policy - Reaching the top together	 very strong focus	 very strong focus	 very strong focus
 <b>Catalonia (ES)</b>	Programa Catalunya Clusters (Catalonia Clusters Programme)	 little focus	 no focus	 medium focus
 <b>Asturias (ES)</b>	Clusters Asturias	 very strong focus	 little focus	 little focus

## 4. Cluster Programmes in Relation to Existing Framework Conditions

Another key finding of the survey of 2012 was that a high relevance of the cluster programmes did not necessarily result in a close relation and coordination with other funding programmes that could provide additional support for the development of clusters through funding of business-related, R&D and infrastructure (including educational infrastructure) projects. At that time, cluster programmes were much better coordinated with other R&D programmes than with business and infrastructure development programmes.

This picture has partly changed over the recent years as Fig. 4 indicates. The majority of the surveyed programmes shows strong or at least medium strong relations between cluster programmes and R&D / innovation as well as business development programmes. A good example is the Norwegian Innovation Clusters Programme because the programme design features of the R&D programmes are well linked to the national cluster programme. This facilitates the access for cluster actors to receive funding for R&D projects, provided that these R&D projects contribute to the respective cluster strategies.

When it comes to the relation and the coordination between cluster and infrastructure support programmes room for improvement can be identified. In most cases, infrastructure programmes are not understood as support measures for cluster development. In this context, corresponding linkages between programmes are still comparably weak.

It is interesting to see that most programmes, especially those of the participating regions, are closely linked with the corresponding regional research and innovation strategies for smart specialisation (RIS3) or, especially at national level, with the overall innovation strategy. This is clearly evident for the fact that cluster programmes are still ranking high on the agenda of policy-makers and that they are considered as an important part of regional or national innovation policies.

Figure 4: Strength of relation of the cluster programmes to other support schemes

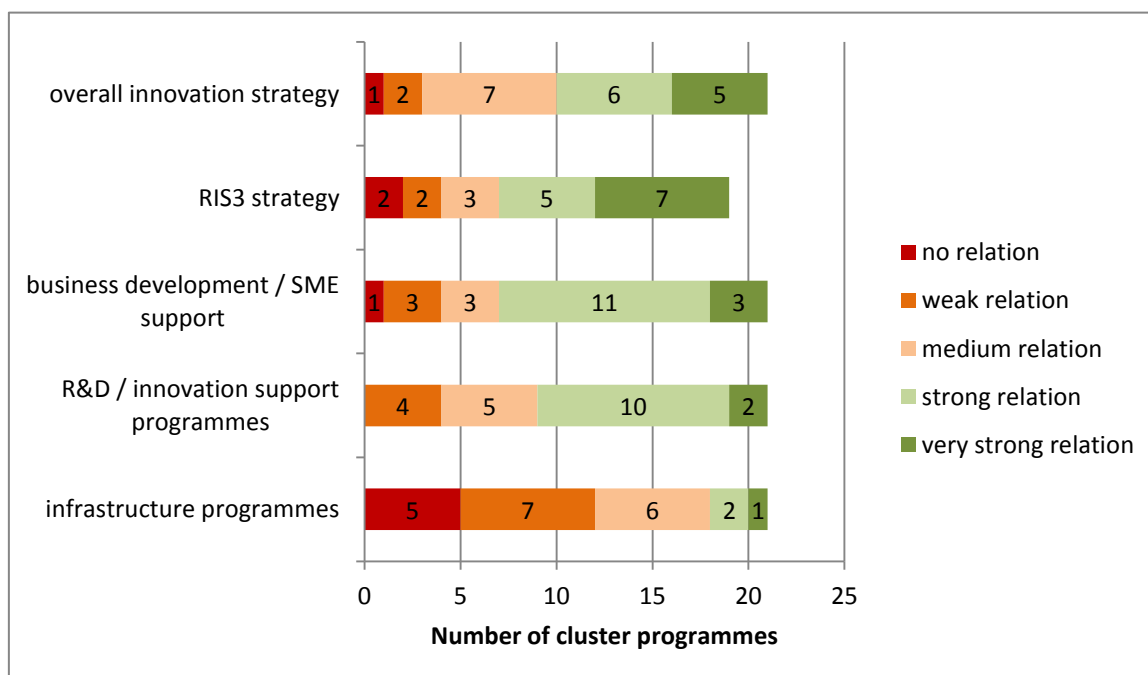












































































































Table 5: Strength of relation of the cluster programmes to other strategies and support programmes

Country	Name of the programme	Strength of relation to regional or national innovation strategy	Strength of relation to RIS3 strategy	Strength of relation of cluster programme with other business development programmes at regional/national level	Strength of relation of the cluster programme with R&D / innovation support programmes	Strength of relation to infrastructure programmes
 Austria	National Cluster Platform Austria (NCPA)	 strong relation	 very strong relation	 strong relation	 strong relation	 weak relation
 Bulgaria	Operational Programme "Innovation and Competitiveness" (OPIC)	 very strong relation	 medium relation	 strong relation	 strong relation	 weak relation
 Czech Republic	Clusters – Cooperation	 medium relation	 medium relation	 very strong relation	 strong relation	 medium relation
 Denmark	Innovation Networks Denmark	 medium relation	 strong relation	 medium relation	 strong relation	 weak relation
 France	Pôles de Compétitivité	 strong relation	 very strong relation	 strong relation	 strong relation	 very strong relation
 Germany	go-cluster	 strong relation	 no relation	 strong relation	 medium relation	 no relation
 Germany	Leading Edge Cluster Competition	 strong relation	 strong relation	 weak relation	 medium relation	 weak relation
 Greece	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	 very strong relation	 very strong relation	 medium relation	 medium relation	 medium relation

Country	Name of the programme	Strength of relation to regional or national innovation strategy	Strength of relation to RIS3 strategy	Strength of relation of cluster programme with other business development programmes at regional/national level	Strength of relation of the cluster programme with R&D / innovation support programmes	Strength of relation to infrastructure programmes
 Latvia	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Programme	 weak relation	 weak relation	 no relation	 weak relation	 no relation
 Montenegro	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	 no relation	 no relation	 strong relation	 weak relation	 weak relation
 Norway	Norwegian Innovation Clusters	 strong relation	-	 strong relation	 strong relation	 medium relation
 Portugal	Competitiveness Clusters	 medium relation	 strong relation	 strong relation	 strong relation	 strong relation
 Romania	Operational Programme “Competitiveness” – OPC	 very strong relation	 very strong relation	 strong relation	 strong relation	 strong relation
 Slovakia	De minimis scheme to support industrial clusters, Clusters Scheme	 medium relation	 strong relation	 very strong relation	 very strong relation	 no relation
 Sweden	VINNVÄXT Regional Growth through Dynamic Innovation Systems	 medium relation	 strong relation	 weak relation	 weak relation	 weak relation
 Turkey	Cluster Support Programme	 very strong relation	-	 strong relation	 strong relation	 no relation

Region	Name of the programme	Strength of relation to regional or national innovation strategy	Strength of relation to RIS3 strategy	Strength of relation of cluster programme with other business development programmes at regional / national level	Strength of relation of the cluster programme with R&D / innovation support programmes	Strength of relation to infrastructure programmes
 Lower Austria (AT)	Cluster Programme Lower Austria	 strong relation	 very strong relation	 very strong relation	 very strong relation	 medium relation
 Lombardy (IT)	Support activities for the development of the tools foreseen by S3 of Regione Lombardia	 medium relation	 very strong relation	 strong relation	 strong relation	 medium relation
 Hamburg (DE)	Hamburg's cluster policy - Reaching the top together	 very strong relation	 very strong relation	 strong relation	 medium relation	 medium relation
 Catalonia (ES)	Programa Catalunya Clusters (Catalonia Clusters Programme)	 weak relation	 weak relation	 weak relation	 weak relation	 weak relation
 Asturias (ES)	Clusters Asturias	 medium relation	 medium relation	 medium relation	 medium relation	 no relation

## 5. Instruments Applied to Support Clusters

### 5.1 Instruments of Cluster Programmes

The previous survey of 2012 revealed that grant funding was the prevailing support instrument of nearly all cluster programmes, while technical assistance (e.g. training or coaching) for capacity development of cluster management organisations was applied by only half of the programmes. At that time, the majority of the programme owners agreed that the provision of funding was not sufficient to develop cluster organisations being capable to drive the sustainable development of a cluster. However, since the flexibility of many programmes was quite limited at that time, not all policy makers were able to include technical assistance components in their respective programmes.

The current survey reveals that nowadays, about 75% of the regional and national programmes include specific technical assistance components in their regional or national programme schemes. The French Programme “Pôles de Compétitivité” included such a component for the first time in its current third programme period. As mentioned previously, a rising number of programmes also focussed on cross-sectoral cooperation and Emerging Industries, combined with new support tools.

There is a common understanding among most programme owners all over Europe that, if SMEs shall be supported by means of cluster organisations to become successfully involved in cross-sectoral cooperation or integrated in value chains of Emerging Industries, specific business support services have to be developed and implemented by respective cluster organisations (e.g. Roadmapping, Foresight, Innovation Arenas, etc.).<sup>8</sup> Consequently, today, quite a considerable number of surveyed programmes explicitly support the development of new business support services to be provided by cluster organisations (15 out of 21) as Table 6 displays. These services shall support SMEs to better deal with current technological and market challenges.<sup>9</sup>

This result is even more impressive when considering the findings of the next chapter that shows that six programmes allocate at least 50% or more of the programme volume to fund or support the development of new business services of cluster organisations. The Catalonian cluster programme “Programa Catalunya Clusters” as well as the German programme “go-cluster” do not offer monetary funding for cluster organisations. Instead, they provide technical support and advice. Furthermore, the Innovation Network Denmark programme is an excellent example of how to provide non-monetary support to cluster organisations.

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<sup>8</sup> European Cluster Observatory (2014). *Cluster Collaboration and Business Support Tools to Facilitate Entrepreneurship, Cross-sectoral Cooperation and Growth*. Available at: <http://ec.europa.eu/growth/smes/cluster/observatory/>. Accessed on 23 March 2015.

<sup>9</sup> Kergel, H., Meier zu Köcker, G., Neger, M. (2014). *New Approaches to Improve the Performance of Cluster Management Organisations in Europe*, Danish Ministry of Science, Technology and Innovation, Copenhagen/Berlin, 2014. Available at: <http://www.iit-berlin.de/de/publikationen/new-approaches-to-improve-the-performance-of-cluster-management-organisations-in-europe/>. Accessed on 23 March 2015.

Table 6: Instruments of cluster programmes

Country	Name of the programme	Funding	Technical assistance (e.g. provision of training and consultancy services)	New services or new “projects” to further cluster development
 Austria	National Cluster Platform Austria (NCPA)	x	x	x
 Bulgaria	Operational Programme “Innovation and Competitiveness” (OPIC)	x		
 Czech Republic	Clusters – Cooperation	x	x	x
 Denmark	Innovation Networks Denmark	x	x	x
 France	Pôles de Compétitivité	x	x	
 Germany	go-cluster		x	x
 Germany	Leading Edge Cluster Competition	x		
 Greece	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	x	x	x
 Latvia	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Programme	x	x	x
 Montenegro	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development		x	x
 Norway	Norwegian Innovation Clusters	x	x	x
 Portugal	Competitiveness Clusters	x	x	x
 Romania	Operational Programme “Competitiveness” – OPC	x		
 Slovakia	De minimis scheme to support industrial clusters, Clusters Scheme	x		
 Sweden	VINNVÄXT Regional Growth through Dynamic Innovation Systems	x	x	x
 Turkey	Cluster Support Programme	x		x



Region	Name of the programme	Funding	Technical assistance (e.g. provision of training and consultancy services)	New services or new “projects” to further develop cluster development
 Lower Austria (AT)	Cluster Programme Lower Austria	x	x	x
 Lombardy (IT)	Support activities for the development of the tools foreseen by S3 of Regione Lombardia	x	x	x
 Hamburg (DE)	Hamburg’s cluster policy - Reaching the top together	x	x	x
 Catalonia (ES)	Programa Catalunya Clusters (Catalonia Clusters Programme)		x	
 Asturias (ES)	Clusters Asturias	x	x	x

## 5.2 Specific Activities Supported in the Programmes

Cluster programmes today tend to support specific activities, meaning that they do more than just funding cluster organisations or providing R&D funds. Figure 5 displays how the shares of the budget for specific supportive activities are distributed. It is interesting to see that in many cluster programmes significant parts of the budget for specific support activities are dedicated to the cluster managements to develop new business support services. This is well in line with the increasing demand to better support cluster participants in Emerging Industries (s. Fig. 3), where traditional services, e.g. networking or matchmaking is not sufficient anymore. On average about 43 % of the budget for specific activities is given to this topic.

Specific support activities in the field of internationalisation still play an important role (on average about 24 %). Two other important topics where significant budgets are allocated to are the support of cluster organisations in initiating cross-clustering activities (about 17 %) as well as the support of cluster management excellence (about 15 %).

Figure 5: Share of budget for specific activities supported within the programmes (average value, basis: 12 programmes)

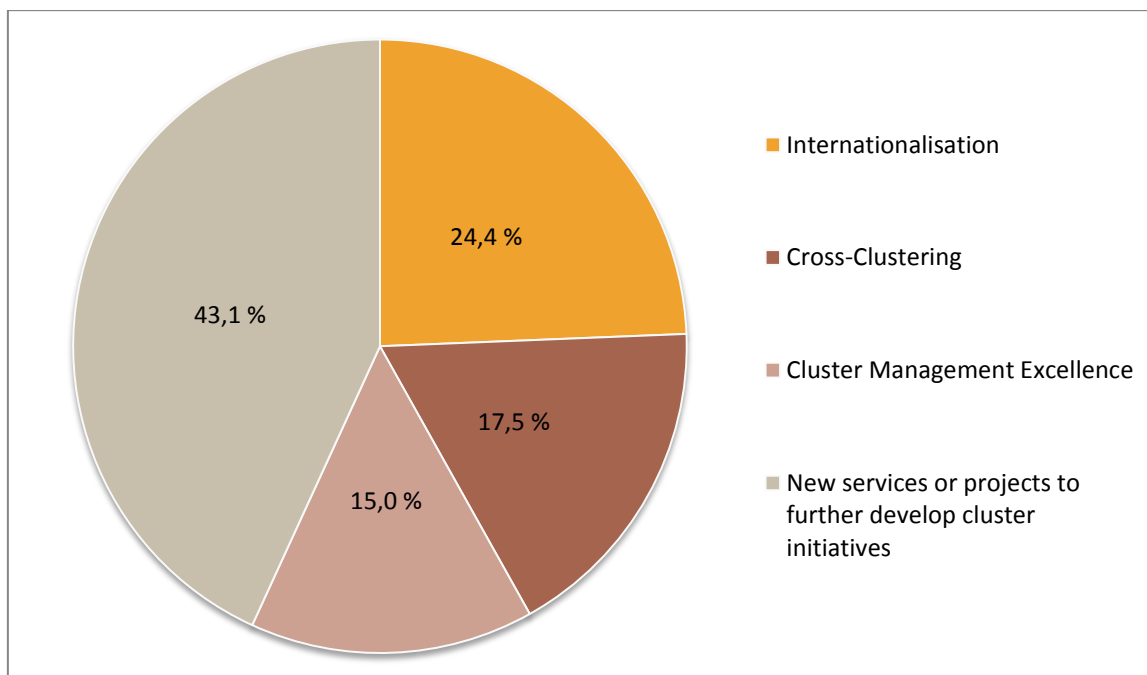























Table 7: Share of support activities (in %)

Country	Name of the programme	Internationalisation	Cross-Clustering	Cluster Management Excellence	New services or “projects” to develop cluster (initiatives) further
 Austria	National Cluster Platform Austria (NCPA)	10	15	5	70
 Bulgaria	Operational Programme “Innovation and Competitiveness” (OPIC)	n.a.	n.a.	n.a.	n.a.
 Czech Republic	Clusters – Cooperation	30	30	20	20
 Denmark	Innovation Networks Denmark	20	15	10	25
 France	Pôles de Compétitivité	n.a.	n.a.	n.a.	n.a.
 Germany	go-cluster	0	20	30	50
 Germany	Leading Edge Cluster Competition	n.a.	n.a.	n.a.	n.a.

Country	Name of the programme	Internationalisation	Cross-Clustering	Cluster Management Excellence	New services or "projects" to develop cluster (initiatives) further
 <b>Greece</b>	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	20	5	5	70
 <b>Latvia</b>	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Programme	50	0	0	50
 <b>Montenegro</b>	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	n.a.	n.a.	n.a.	n.a.
 <b>Norway</b>	Norwegian Innovation Clusters	n.a.	n.a.	n.a.	n.a.
 <b>Portugal</b>	Competitiveness Clusters	30	20	20	30
 <b>Romania</b>	Operational Programme “Competitiveness” – OPC	25	25	20	30
 <b>Slovakia</b>	De minimis scheme to support industrial clusters, Clusters Scheme	n.a.	n.a.	n.a.	n.a.
 <b>Sweden</b>	VINNVÄXT Regional Growth through Dynamic Innovation Systems	n.a.	n.a.	n.a.	n.a.
 <b>Turkey</b>	Cluster Support Programme	n.a.	n.a.	n.a.	n.a.

Region	Name of the programme	Internationalisation	Cross-Clustering	Cluster Management Excellence	New services or “projects” to develop cluster (initiatives) further
 Lower Austria (AT)	Cluster Programme Lower Austria	10	15	5	70
 Lombardy (IT)	Support activities for the development of the tools foreseen by S3 of Regione Lombardia	20	30	30	20
 Hamburg (DE)	Hamburg’s cluster policy - Reaching the top together	30	10	10	50
 Catalonia (ES)	Programa Catalunya Clusters (Catalonia Clusters Programme)	n.a.	n.a.	n.a.	n.a.
 Asturias (ES)	Clusters Asturias	40	20	20	20

### 5.2.1 Role of Cluster Management Excellence

In 2009, the European Cluster Policy Group clearly recommended cluster management excellence as of high relevance and importance for the development of cluster initiatives<sup>10</sup>, since SMEs and other cluster actors can significantly benefit from excellent cluster organisations.<sup>11</sup> The European Cluster Excellence Initiative (ECEI), the European Cluster Excellence Foundation (ECEEF) as well as the European Secretariat for Cluster Analysis (ESCA) are outcomes of efforts by the European Commission to support cluster organisations in Member States on their way towards cluster management excellence under the European Cluster Excellence Initiative that was supported by the Directorate-General “Internal Market, Industry, Entrepreneurship and SMEs”. Many Member States and regions have turned these recommendations into policy actions and programmes.

Still, five years later, cluster management excellence plays an important role in most of the surveyed cluster programmes. More than 80% of these programmes focus on this topic, and the majority of the programmes actively encourage and support cluster organisations to improve their professionalisation according to the ECEI approach. Compared to the survey of 2012, this is a strong increase (less than 50 % of the programmes focussed on this topic at that time). Furthermore, 8 out of 21 programmes have implemented the Cluster Management Excellence Labelling Approach according to the ECEI as a mandatory programme component (s. Fig. 6).

<sup>10</sup> European Cluster Policy Group Final Recommendations – A Call for Policy Action (2014). Available at: <http://www.clusterobservatory.eu/index.html#!view=classroom;url=/classroom/ECPG/>. Accessed in 13 April 2015.

<sup>11</sup> Müller, L., Lämmer-Gamp, T., Meier zu Köcker, G., Christensen, T.: *Clusters are Individuals, Vol. II, New Findings from the Clustermanagement and Clusterprogramme Benchmarking*. Berlin: VDI/VDE-IT GmbH, 2012. Available at: <http://www.cluster-analysis.org/downloads/ClustersareIndividualsVolumellAnnex.pdf>. Accessed on: 23 March 2015.

Figure 6: Focus on cluster management in surveyed cluster programmes

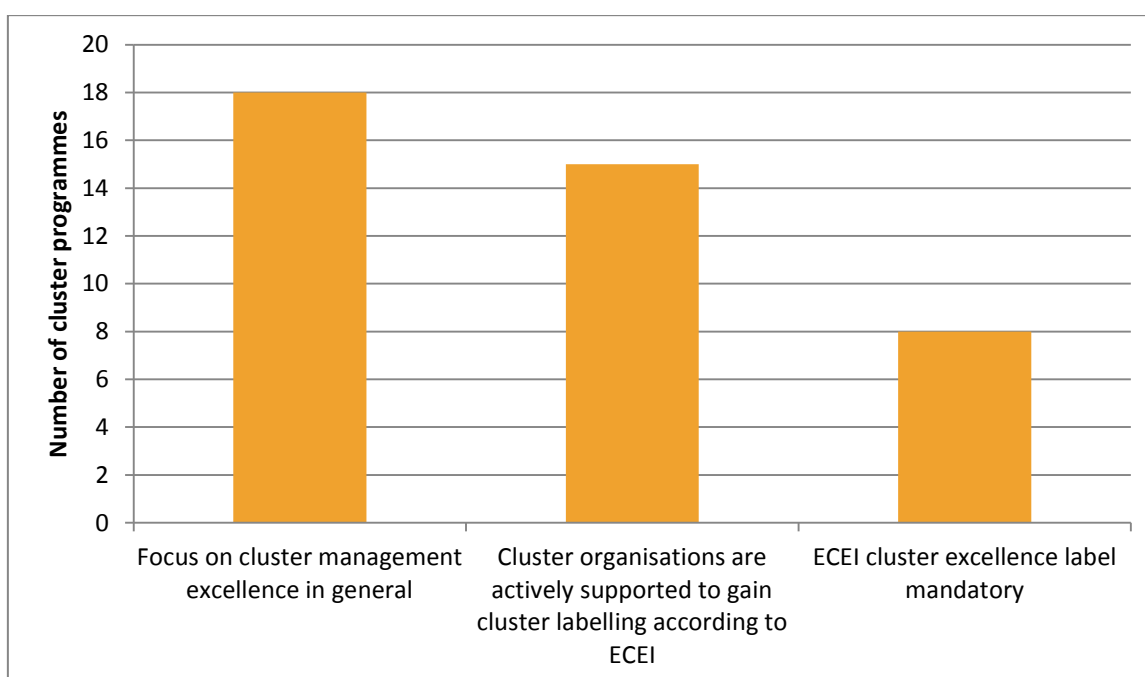























Table 8: Role of cluster management excellence in the surveyed programmes

Country	Name of the programme	Focus given on cluster management excellence in general	Cluster organisations are actively supported to gain cluster labelling according to ECEI	It is mandatory for cluster initiatives to gain or maintain certain cluster labels according to ECEI
 Austria	National Cluster Platform Austria (NCPA)	x	x	-
 Bulgaria	Operational Programme "Innovation and Competitiveness" (OPIC)	-	-	-
 Czech Republic	Clusters – Cooperation	x	x	x
 Denmark	Innovation Networks Denmark	x	x	x
 France	Pôles de Compétitivité	x	-	-
 Germany	go-cluster	x	x	x
 Germany	Leading Edge Cluster Competition	x	x	x
 Greece	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	x	x	-

Country	Name of the programme	Focus given on cluster management excellence in general	Cluster organisations are actively supported to gain cluster labelling according to ECEI	It is mandatory for cluster initiatives to gain or maintain certain cluster labels according to ECEI
 Latvia	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Programme	-	-	-
 Montenegro	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	-	-	-
 Norway	Norwegian Innovation Clusters	x	x	x
 Portugal	Competitiveness Clusters	x	x	-
 Romania	Operational Programme “Competitiveness” – OPC	x	x	-
 Slovakia	De minimis scheme to support industrial clusters, Clusters Scheme	x	-	-
 Sweden	VINNVÄXT Regional Growth through Dynamic Innovation Systems	x	x	-
 Turkey	Cluster Support Programme	x	-	-
Region	Name of the programme	Focus given on cluster management excellence in general	Cluster organisations are actively supported to gain cluster labelling according to ECEI	It is mandatory for cluster initiatives to gain or maintain certain cluster labels according to ECEI
 Lower Austria (AT)	Cluster Programme Lower Austria	x	x	-
 Lombardy (IT)	Support activities for the development of the tools foreseen by S3 of Regione Lombardia	x	x	x
 Hamburg (DE)	Hamburg’s cluster policy - Reaching the top together	x	x	x
 Catalonia (ES)	Programa Catalunya Clusters (Catalonia Clusters Programme)	x	x	x
 Asturias (ES)	Clusters Asturias	x	x	-

### 5.2.2 Role of Internationalisation Activities

The internationalisation of clusters and their actors ranks still high on the agenda of policy makers and is therefore often an important programme design feature. As shown in Fig. 7 internationalisation plays an important role in most programmes (20 out of 21 programme managers / owners consider this to be at least of medium importance). Consequently, many programmes provide funding of dedicated measures supporting cluster internationalisation (15 out of 21 programmes). Furthermore, a high number of programmes (17 out of 21) support the development of new tools, such as new cluster management services, helping cluster managements to better support SMEs in their international activities.

Figure 7: Importance and support tool for internationalisation of clusters

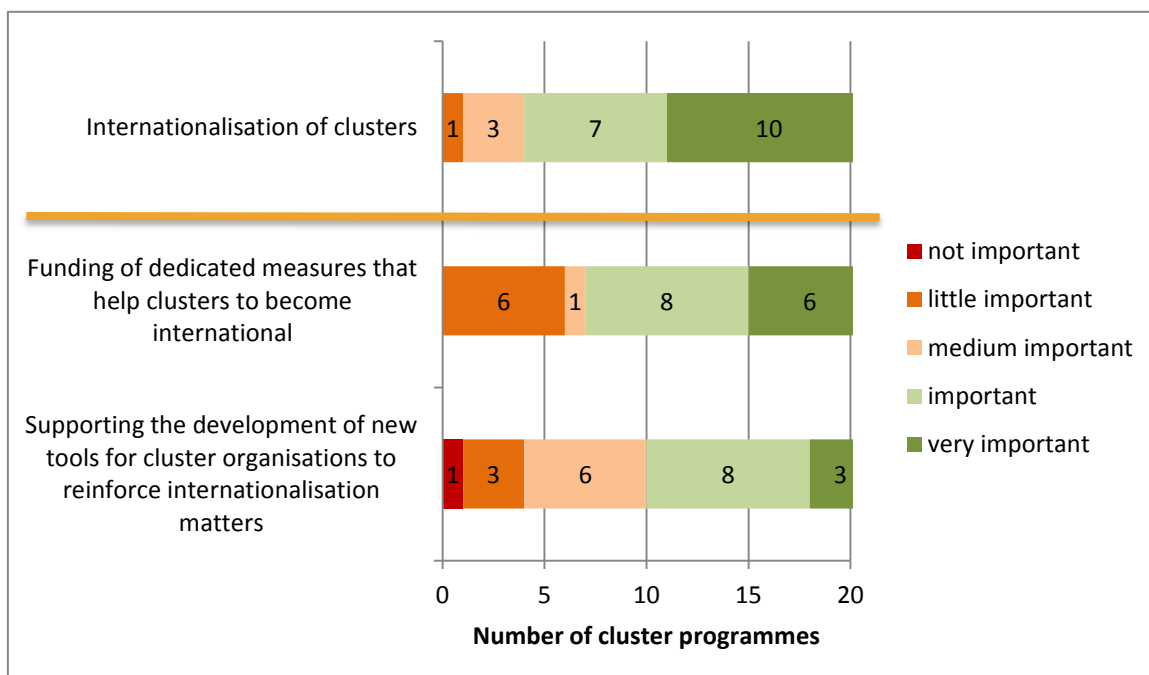






















Table 9: Internationalisation activities

Country	Name of the programme	Importance of internationalisation of clusters	Importance of the funding of dedicated measures supporting clusters to become international	Importance of the development of new tools for cluster organisations to support internationalisation matters
 Austria	National Cluster Platform Austria (NCPA)	 important	 little important	 important
 Bulgaria	Operational Programme “Innovation and Competitiveness” (OPIC)	 important	 important	 medium important
 Czech Republic	Clusters – Cooperation	 very important	 important	 medium important
 Denmark	Innovation Networks Denmark	 very important	 important	 important
 France	Pôles de Compétitivité	 medium important	 important	 important
 Germany	go-cluster	 little important	 little important	 medium important
 Germany	Leading Edge Cluster Competition	 medium important	 important	 little important
 Greece	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	 very important	 very important	 important
 Latvia	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Programme	 very important	 very important	 important
 Montenegro	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	 very important	 very important	 very important
 Norway	Norwegian Innovation Clusters	 very important	 little important	 little important
 Portugal	Competitiveness Clusters	 very important	 very important	 important
 Romania	Operational Programme “Competitiveness” – OPC	 important	 important	 important
 Slovakia	De minimis scheme to support industrial clusters, Clusters Scheme	 medium important	 important	 medium important
 Sweden	VINNVÄXT Regional Growth through Dynamic Innovation Systems	 very important	 important	 medium important
 Turkey	Cluster Support Programme	 very important	 very important	 very important



Region	Name of the programme	Importance of internationalisation of clusters	Importance of the funding of dedicated measures supporting clusters to become international	Importance of the development of new tools for cluster organisations to support internationalisation matters
 Lower Austria (AT)	Cluster Programme Lower Austria	 important	 little important	 important
 Lombardy (IT)	Support activities for the development of the tools foreseen by S3 of Regione Lombardia	 important	 little important	 medium important
 Hamburg (DE)	Hamburg's cluster policy - Reaching the top together	 very important	 very important	 very important
 Catalonia (ES)	Programa Catalunya Clusters (Catalonia Clusters Programme)	 important	 little important	 not important
 Asturias (ES)	Clusters Asturias	 important	 medium important	 little important

## 6. Key Findings

This new survey on cluster programmes in Europe has yielded some very interesting key findings and trends, which are summarised below in Table 10. Clusters and cluster programmes still belong to the top priorities on the agendas of regional and national policy makers, although the number of programmes has significantly decreased. Most of the programme designs are a consistent reply on the current challenges caused by industrial transformation processes and global trends. When comparing the results of the previous surveys with the current findings, it becomes clear that the majority of the programmes are more complex than previous ones, but also more tailor-made to the current challenges and needs. Most of the programmes reserve budgets for specific support actions. Especially regional programmes are consequently based on smart strategies intended to guide the innovation related investments under the European Regional Development Funds. The key findings provide further insight on the specific characteristics of the different cluster programmes and give guidance for the future development of cluster programmes.

Table 10: Overview of key findings






Key findings and trends of cluster programmes in Europe
1. Fewer countries in Europe have dedicated cluster programmes in place compared to 2008 as a result of a beginning trend to broaden the scope from clusters towards regional development and of making better use out of clusters by implementing regional innovation and development policies rather than to fund clusters themselves. This trend is expected to increase towards new regional cooperation models.
2. Cluster programmes have become more selective. Today, they focus more on the support of matured clusters, world class clusters and clusters in Emerging Industries than in 2008. In the past, almost all types of clusters were supported. An exception from this trend are the catching-up countries. They mainly focus on supporting embryonic clusters or the set-up of cluster initiatives.
3. Today, cluster management excellence is in the focus of almost all cluster programmes. This was not the case three years ago.
4. Supporting cluster internationalisation is still an important part of most of the programmes. Besides funding of dedicated measures, the development of new business support tools by the cluster management organisation has become an important programme design feature.
5. Many cluster programmes provide separate budgets for specific support activities of cluster managements. This enables the programmes to better support cluster organisations according to their demands. Internationalisation, cross-clustering and cluster management excellence are still key areas for specific support actions.
6. Nowadays, the majority of programmes contains non-monetary support schemes intended for cluster organisations to increase professionalisation and to develop new business support services for the benefit of their cluster actors.
7. The majority of the cluster programmes is well linked to national or regional specialisation or innovation strategies.




## 7. Technical Details and Financial Scope of the Cluster Programmes in Europe

The table below provides an overview for each cluster programme about its term, budget, and type of funding, technology focus, funding periods, and financing structure

Table 11: Technical details and financial scope of the cluster programmes


Country	 Austria	 Bulgaria	 Czech Republic	 Denmark	 France
Name	National Cluster Platform Austria (NCPA)	Operational Programme "Innovation and Competitive-ness" (OPIC)	Clusters – Cooperation	Innovation Networks Denmark	Pôles de Compétitivité
Term of the programme	2015-2020 (option: +1)	2015 – 2020	2015-2020	2010-2018	2013-2018
Budget	22 Mio EUR for 6 years (option: +1)	843 Mio EUR	70 Million EUR	10 Million EUR p.a.	450 Million EUR for first three years
Type of funding	"Technical Assistance": basic funding for cluster management	co-financing, support	co-financing, support 40% – 50%	Grant distributed among coordinating organisation (secretariat) and other partnering public and not-for-profit knowledge organisations.	grant
Does the programme have a specific technology focus?	no	no	no	no	no
Maximum funding period for a project	n.a.	24 months	36 months	48 months with possibility of extension	60 months
Is there a maximum amount of funding an applicant can apply for?	no	no	around 3 Million EUR	around 1 Million EUR p.a.	5 Million EUR
Financing structure of projects	Public: Regional funds: 40%, ERDF: 50% Private (membership fees, sponsoring): 10%	Financing from the ERDF almost - 85% of the budget and national co-financing - 15% of the budget	Ex post – at first day have to pay it themselves, they get the money after the project.	The public grant must be leveraged by at least as much funding from other sources. Private in-kind or in-cash contributions must equal at least 80% of the grant while the remainder may come from EU, regional or local sources.	State : 23% Regional or local authorities : 20% Private structures : 57%

Country	 Germany	 Germany	 Greece	 Latvia	 Montenegro
<b>Name</b>	go-cluster	Leading Edge Cluster Competition	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	Operational Programme „Entrepreneurship and Innovations“, Activity 2.3.2.3. Cluster Programme	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development
<b>Term of the programme</b>	2012-2015	2009 – 2015	2008-2015	2012-2015	2014-2016
<b>Budget</b>	1 Million EUR p.a.	600 Million EUR	60 Million EUR	5 Million EUR	500.000 EUR
<b>Type of funding</b>	“Technical Assistance” + basic funding for cluster management	grant	ERDF European Regional Development Fund NSRF National Strategic Reference Programme	ERDF European Regional Development Fund	Project is funded by EU, implemented and co-funded (5%) by United Nations Industrial Development Organization (UNIDO)
<b>Does the programme have a specific technology focus?</b>	no	no	yes Nano/Microelectronics-based Systems & Applications	no	No
<b>Maximum funding period for a project</b>	9 months	60 month	Open	4 years	open
<b>Is there a maximum amount of funding an applicant can apply for?</b>	40.000 EUR	40 Million EUR	5 Million EUR	Ca. 400.000 EUR	Programme for alignment with international standards of business (up to 5.000 EUR) Programme for equipment purchasing (up to 10.000 EUR)
<b>Financing structure of projects</b>	co-financing, 50%	Co-financing, up to 50 %	Grants	70% of funding for the clusters (90% aid intensity), 30% of funding to support SMEs and other partners (85% aid intensity)	Standards: Ministry of economy reimburse up to 70% for entrepreneurs and small firms while for medium firms they reimburse up to 60% (maximum amount 5.000 EUR) Programme for equipment purchasing: Ministry of Economy reimburse up to 70% of purchased equipment and minimum three enterprises can apply for programme IDF credit line: Maximum amount is 500.000 EUR, minimum amount is 10.000 EUR, interest rate is 5%, repayment period 8 years and two years of grace period

Country	 Norway	 Portugal	 Romania
Name	Norwegian Innovation Clusters	Competitiveness Clusters	Operational Programme “Competitiveness” – OPC
Term of the programme	2014 – ongoing	2015 – 2020	2015 – 2020
Budget	-	-	620 Million EUR
Type of funding	grant	grant	grants (non-refundable financial assistance in one or more instalments)
Does the programme have a specific technology focus?	No	No	Smart specialisation: Bio-economy IT&C, space and security Energy, environment and climate changes Eco-nano-technologies and advanced materials Health - national priority field
Maximum funding period for a project	3 sub-programmes: Arena 5 years, NCE 10 years, GCE 10 years	5 years	5 years
Is there a maximum amount of funding an applicant can apply for?	3 sub-programmes: Arena 375.000 EUR, NCE 750.000 EUR, GCE 1,2 Million EUR	no, depends on the instrument and type of incentive	7,5 Million EUR
Financing structure of projects	50/50 public/private	financing structure allows public funding ranging typically from 65% to 85% support	Activities eligible for financing: Investment in common RD facilities for the use of cluster Innovation activities within the cluster Operating activities for cluster, cluster animation to facilitate co-operation, information exchange and providing or directing specialized and personalized services for businesses.

Country	 Slovakia	 Sweden	 Turkey
Name	De minimis scheme to support industrial clusters, Clusters Scheme	VINNVÄXT Regional Growth through Dynamic Innovation Systems	Cluster Support Programme
Term of the programme	2015	2002 – 2022	2015 – ongoing
Budget	130.000 EUR	8,5 Million EUR p.a.	10 Million EUR
Type of funding	Grant	grant	grant
Does the programme have a specific technology focus?	No	No	activities in specific technologies such as biotechnology, nanotechnology and ICT bonus points are granted in evaluation
Maximum funding period for a project	9 months	10 years	5 years
Is there a maximum amount of funding an applicant can apply for?	20.000 EUR	1 Million EUR	10 Million EUR
Financing structure of projects	70 % intensity of aid (refund), 30 % co-financing		50 % of the total business plan budget will be supported as a grant from national budget

Region	 Lower Austria (AT)	 Region Lombardy (IT)	 Region Hamburg (DE)
Name	Cluster Program Lower Austria	Support activities for the development of the tools foreseen by Smart Specialisation Strategy of Regione Lombardia	Hamburg's cluster policy - Reaching the top together
Term of the programme	2015 – 2020	2014 – 2015	2010 – ongoing
Budget	22 Million EUR for six years	complex programme which is fed gradually, no info available	No budget for comprehensive programme. (individual budgets for specific clusters, varies from 250.000,-€ to 800.000,-€ p.a.)
Type of funding	“Technical Assistance” + basic funding for cluster management	Regional funds and ERDF	varies
Does the programme have a specific technology focus?	No	No	No
Maximum funding period for a project	No	2 years	No
Is there a maximum amount of funding an applicant can apply for?	No	100.000 EUR	varies
Financing structure of projects	Public: Regional funds: 40% ERDF: 50% Private (membership fees, sponsoring): 10%	100% regional finance	varies

Region	 Region Catalonia (ES)	 Region Asturias (ES)
Name	Programa Catalunya Clusters (Catalonia Clusters Programme)	Clusters Asturias
Term of the programme	2014 – ongoing	2008 – ongoing
Budget	None	250.000 EUR
Type of funding	None, service programme	grant
Does the programme have a specific technology focus?	No	no
Maximum funding period for a project	None	1 year
Is there a maximum amount of funding an applicant can apply for?	No	Yes. It depends on the project Creation: 40.000,00 €, Governance, studies: 60.000,00 € Collaborative projects: 125.000,00 €
Financing structure of projects	None	Substantial contribution at the beginning from the local government. Temporary public funding for governance (maximum 10 years): Creation: 100% public funding Governance: steady decrease in the level of public funding (max. 10 years – rate de-crease 10%) Collaborative projects: 70% public funding (50% budget assumed by companies)



**For further information, please consult the European Cluster Observatory Website:**

<http://ec.europa.eu/growth/smes/cluster/observatory/>



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