

European Cluster Observatory

REPORT

# Cluster Programmes in Europe

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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 “SMEs: Clusters and Emerging Industries” 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 on a 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 are science and education<sup>1</sup>. The majority of the cluster programmes had no particular focus on clusters in a certain life cycle; they just supported any kind of clusters. The programmes that focussed on particular life cycles tended to focus 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 give 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 had become more and more important in recent years.
- Monitoring and evaluation was important, but difficult.

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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.

- Cluster policy became 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 on national and regional level within Europe. Since the economic and innovation-related framework conditions have significantly changed over the recent past, the focus of cluster policy and related programme developed further. Nowadays, increased importance is given to Emerging Industries, the new nature of innovation, the need of cross-sectoral cooperation, the increasing convergences of technologies, etc. During the recent years, many regions have developed their Smart Specialisation Strategies. The current cluster support schemes reflect these regional strategies.

The current document provides a snapshot of the respective programmes. Due to the fact that the next period of European Structural Funds is just about to start, 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 periodically updated under the European Cluster Observatory scheme.

## 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, 14 national cluster programmes from 13 countries including Denmark, Czech Republic, France, Germany, Greece, Latvia, Montenegro, Norway, Portugal, Romania, Slovakia, Sweden and Turkey participated in the current cluster programme benchmarking.

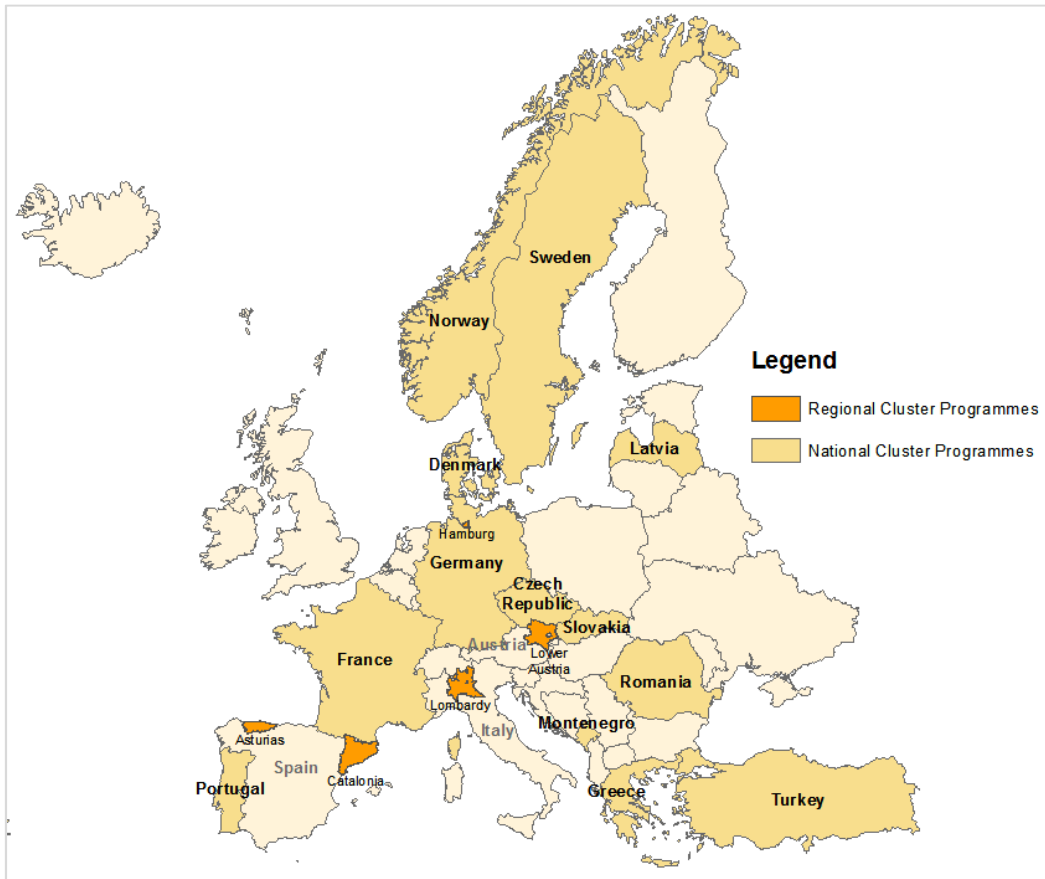
In addition, twelve regions with important cluster programmes have been invited to join the cluster programme survey. These regions include the six Model Demonstrator Regions of the European Cluster Observatory and the six regions supported within the "Clusters and Entrepreneurs in Emerging Industries". Ultimately, four regions replied. These are Asturias, Catalonia, Hamburg, Lombardy and Lower-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 14 national and 5 regional 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	Name of the programme and website	Overall objectives
 <b>Czech Republic (CZ)</b>	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>
 <b>Denmark (DK)</b>	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>
 <b>France (FR)</b>	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>
 <b>Germany (DE)</b>	go-cluster  <a href="http://www.clusterplatform.de/CLUSTER/Navigation/DE/Bund/go-cluster/go-cluster.html">http://www.clusterplatform.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>
 <b>Germany (DE)</b>	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>
 <b>Greece (GR)</b>	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>
 <b>Latvia (LV)</b>	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>
		<ul style="list-style-type: none"> <li>• Enhancing competitiveness and market access of cluster</li> </ul>





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



<b>Montenegro (ME)</b>	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development  <a href="http://www.unido.org">www.unido.org</a>	SMEs and network in Montenegro
 <b>Norway (NO)</b>	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>
 <b>Portugal (PT)</b>	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>
 <b>Romania (RO)</b>	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>
 <b>Slovakia (SK)</b>	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>
 <b>Sweden (SE)</b>	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>
 <b>Turkey (TR)</b>	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> </ul>

 <b>Region Lombardy (IT)</b>	Support activities for the development of the tools foreseen by S <sup>3</sup> of Regione Lombardia	<ul style="list-style-type: none"> <li>• Continuous monitoring of the performance and new developments</li> <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	<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	<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	<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 dramatic 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 those striving for world class.

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

Although the topic of Emerging Industries is comparably young, it is interesting to see that more and more cluster programmes provide dedicated support to clusters in Emerging Industries.<sup>4</sup> More than half of the surveyed programmes (13 out of 19) focus on Emerging Industries. This is a higher number than in the past.

<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.

Figure 2: Targeted clusters (19 programmes participated)

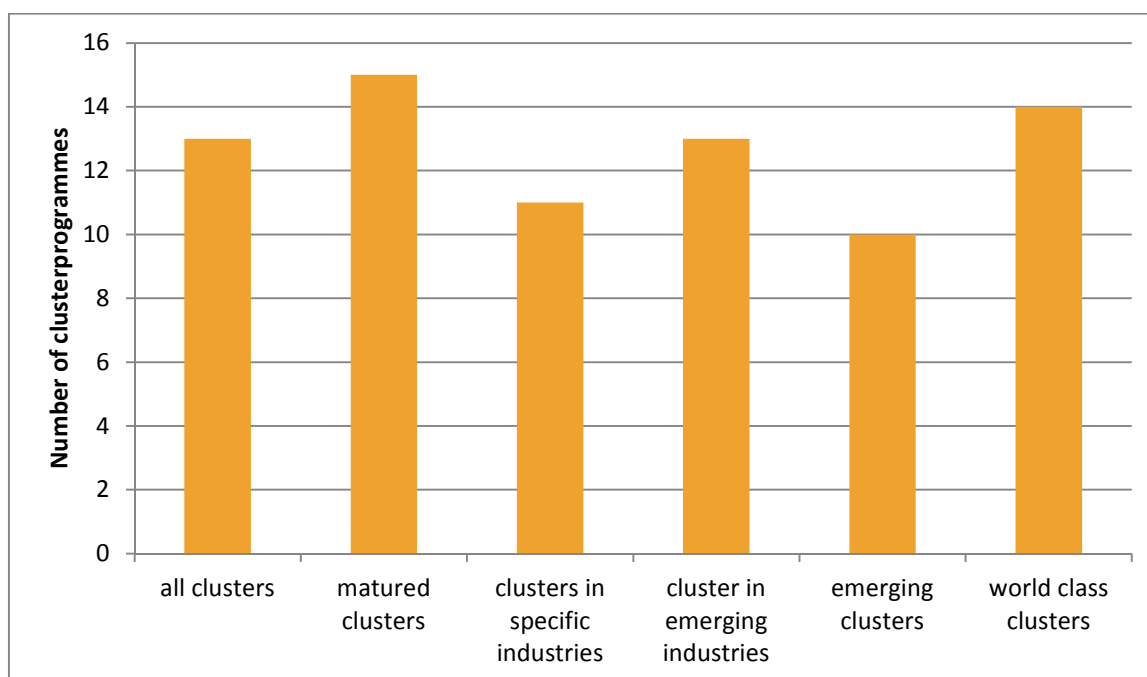





















Table 2: Targeted clusters

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
 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

 <b>Latvia</b>	OP Cluster Programme		x	x		x	
 <b>Montenegro</b>	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	x	x	x			
 <b>Norway</b>	Norwegian Innovation Clusters		x		x	x	X
 <b>Portugal</b>	Competitiveness Clusters	x	x		x	x	x
 <b>Romania</b>	Operational Programme Competitiveness	x	x	x	x	x	x
 <b>Slovakia</b>	Clusters Scheme	x	x	x	x	x	x
 <b>Sweden</b>	Vinnväxt	x	x	x	x	x	x
 <b>Turkey</b>	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
 <b>Lower Austria (AT)</b>	Cluster Programme Lower Austria	x					
 <b>Lombardy (IT)</b>	Support activities for the development of the tools foreseen by S <sup>3</sup> of Regione Lombardia	x			x		x
 <b>Hamburg (DE)</b>	Hamburg's cluster policy - Reaching the top together	x	x	x	x	x	x
 <b>Catalonia (ES)</b>	Catalonia Clusters Programme	x					
 <b>Asturias (ES)</b>	Clusters Asturias	x	x	x			x




### 3. Focus of 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 professionalize existing cluster managements and only a few, mainly catching-up countries, support the establishment of new cluster organisations due to the fact, the 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
 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

 <b>Slovakia</b>	Clusters Scheme		x
 <b>Sweden</b>	Vinnväxt	x	x
 <b>Turkey</b>	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
 <b>Lower Austria (AT)</b>	Cluster Programme Lower Austria		x
 <b>Lombardy (IT)</b>	Support activities for the development of the tools foreseen by S <sup>3</sup> of Regione Lombardia	x	x
 <b>Hamburg (DE)</b>	Hamburg's cluster policy - Reaching the top together		x
 <b>Catalonia (ES)</b>	Catalonia Clusters Programme		x
 <b>Asturias (ES)</b>	Clusters Asturias		x

## 3.2 Industrial Focus

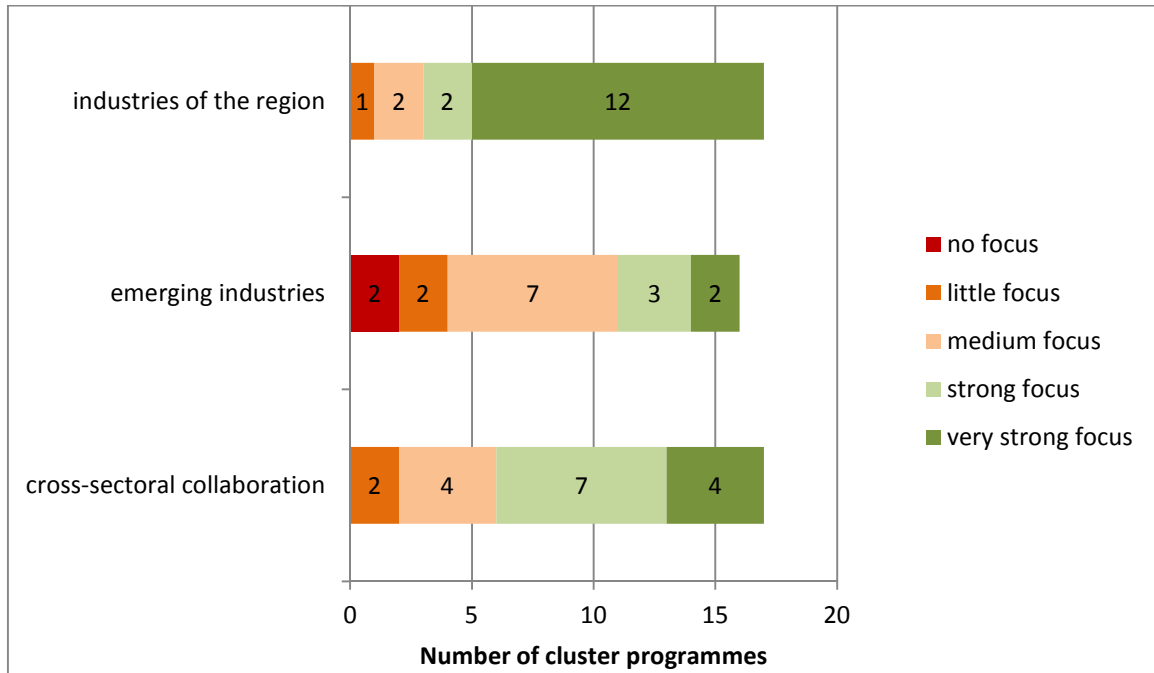
Cluster programmes in Europe aim at increasing innovation capabilities and competitiveness especially of SMEs. When having a closer look at the programmes ten years ago, the focus was to have cluster (initiatives) available in all industrial sectors that were of relevance for a nation or region. This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

Today, it is still ranking high on the agenda to have clusters available in important industrial sectors. But furthermore, dedicated focus is put to enable cross-sectoral collaboration between cluster actors from different industries. Many programmes, e.g. the Czech cluster programme, put very 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.

On a relatively lower level, but significantly increasing during the recent past, is the focus to support clusters in Emerging Industries. However, it has to be taken into account, that there is still no harmonised definition of what Emerging Industries are all about as the participating countries and regions have different views on that. But 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>5</sup>. Accordingly, many cluster programmes actively support cluster organisations to better provide added value to SMEs<sup>6</sup> by developing new, tailor-made business services for SMEs, especially in the field of cross-sectoral cooperation (Fig. 3). Especially those programmes, which are quite new, 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































<sup>5</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>6</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.

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
 <b>Czech Republic</b>	Clusters – Cooperation	 very strong focus	 medium focus	 very strong focus
 <b>Denmark</b>	Innovation Networks Denmark	 very strong focus	 medium focus	 strong focus
 <b>France</b>	Pôles de Compétitivité	 very strong focus	 strong focus	 medium focus
 <b>Germany</b>	go-cluster	 medium focus	 medium focus	 very strong focus
 <b>Germany</b>	Leading Edge Cluster Competition	 no focus	 medium focus	 little focus
 <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 S <sup>3</sup> 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 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. Strong or at least medium strong relations between cluster programmes on one side and R&D / innovation as well as business development programmes on the other side can be reported by the majority of the surveyed 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 these R&D projects contribute to the respective cluster strategies.

Room for improvement can be identified when it comes to relation and coordination between cluster and infrastructure support programmes. 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

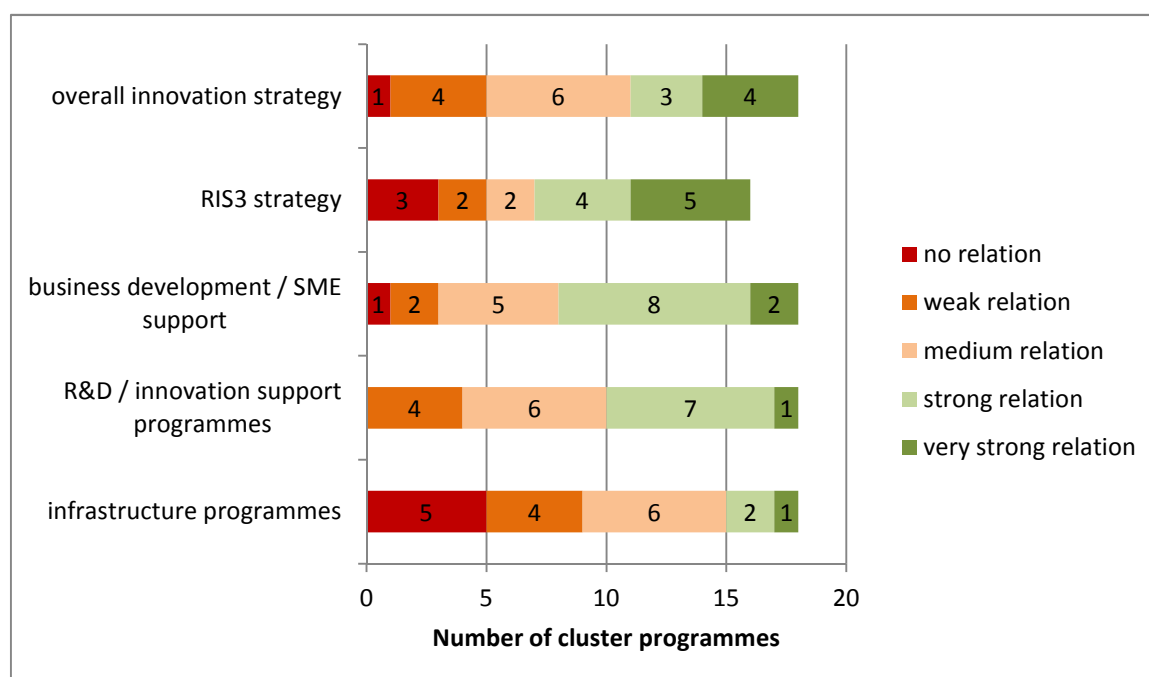
































































Table 5: Strength of relation of the cluster programmes to other strategies and support programmes

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 on regional / national level	Strength of relation of the cluster programme with R&D / innovation support programmes	Strength of relation to infrastructure programmes
 <b>Czech Republic</b>	Clusters – Cooperation	 medium relation	 medium relation	 very strong relation	 strong relation	 medium relation
 <b>Denmark</b>	Innovation Networks Denmark	 medium relation	 strong relation	 medium relation	 strong relation	 weak relation
 <b>France</b>	Pôles de Compétitivité	 strong relation	 very strong relation	 strong relation	 strong relation	 very strong relation
 <b>Germany</b>	go-cluster	 strong relation	 no relation	 strong relation	 medium relation	 no relation
 <b>Germany</b>	Leading Edge Cluster Competition	 strong relation	 strong relation	 weak relation	 medium relation	 weak relation
 <b>Greece</b>	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	 very strong relation	 very strong relation	 medium relation	 medium relation	 medium relation
 <b>Latvia</b>	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Programme	 weak relation	 weak relation	 no relation	 weak relation	 no relation

 <b>Montenegro</b>	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	 no relation	 no relation	 strong relation	 weak relation	 weak relation
 <b>Norway</b>	Norwegian Innovation Clusters	 strong relation	-	 strong relation	 strong relation	 medium relation
 <b>Portugal</b>	Competitiveness Clusters	 medium relation	 strong relation	 strong relation	 strong relation	 strong relation
 <b>Romania</b>	Operational Programme “Competitiveness” – OPC	 very strong relation	 very strong relation	 strong relation	 strong relation	 strong relation
 <b>Slovakia</b>	De minimis scheme to support industrial clusters, Clusters Scheme	 medium relation	 strong relation	 very strong relation	 very strong relation	 no relation
 <b>Sweden</b>	VINNVÄXT Regional Growth through Dynamic Innovation Systems	 medium relation	 strong relation	 very strong relation	 very strong relation	 very strong relation
 <b>Turkey</b>	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 on regional / national level	Strength of relation of 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 S <sup>3</sup> 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 “Pôle de Compétitivité” included such a component for the first time in its current third programme period. As mentioned previously, more and more 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>7</sup>. Accordingly, quite a considerable number of surveyed programmes explicitly support the development of new business support services to be provided by cluster organisations (14 out of 19)<sup>8</sup>. These services shall support SMEs to better deal with current technological and market challenges.

This result is even more impressive when considering the findings of the next chapter that shows that four 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 any funding of cluster organisations rather than only provide technical support and advice. Also the Innovation Networks Denmark programme is an excellent example how to provide non-monetary support to cluster organisations.






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<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.

<sup>8</sup> Kergel, H., Meier zu Köcker, G., Nerger, 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 develop cluster development
 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 S <sup>3</sup> 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 within 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, almost 40 % 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 25 %). Two other important topics, where significant budgets are allocated, are the support of cluster organisations in initiating cross-clustering activities (about 18 %) as well as the support of cluster management excellence (about 17 %).



Figure 5: Share of budget for specific activities supported within the programmes (average value, basis: 11 programmes)

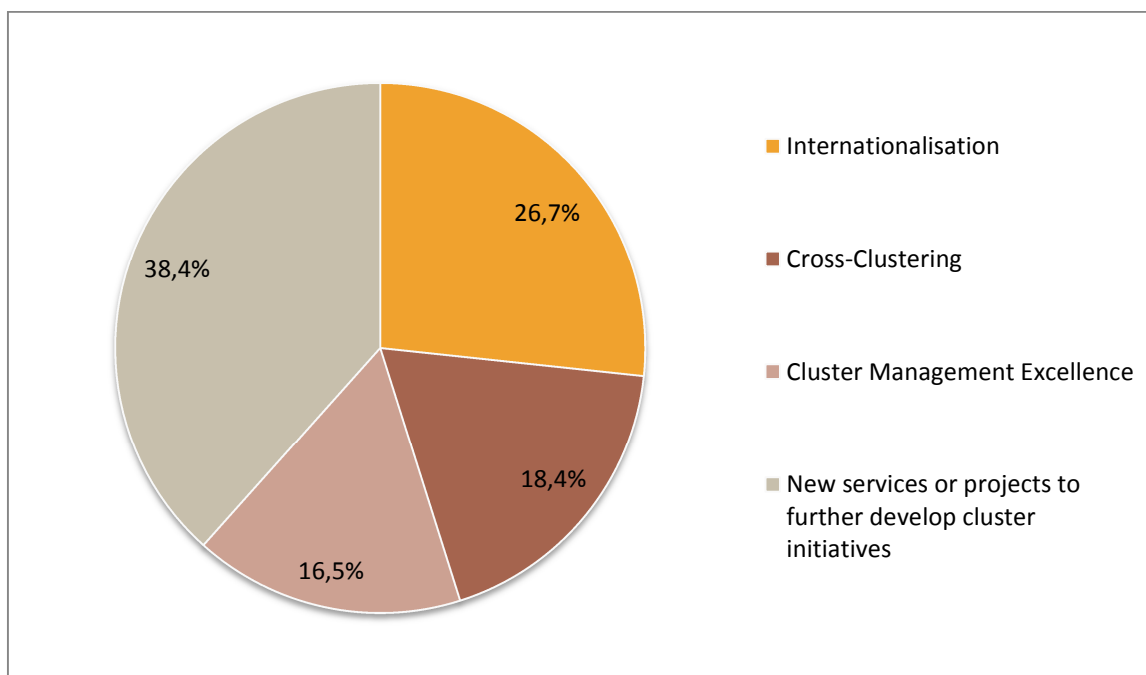





















Table 7: Share of support activities (in %)

Country	Name of the programme	Internationalisation	Cross-Clustering	Cluster Management Excellence	New services or “projects” to develop cluster (initiatives) further
 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		20	30	50
 Germany	Leading Edge Cluster Competition		n.a.	n.a.	n.a.
 Greece	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
 <b>Lower Austria (AT)</b>	Cluster Programme Lower Austria	10	15	5	70
 <b>Lombardy (IT)</b>	Support activities for the development of the tools foreseen by S <sup>3</sup> of Regione Lombardia	20	30	30	20

 <b>Hamburg (DE)</b>	Hamburg's cluster policy - Reaching the top together	30	10	10	50
 <b>Catalonia (ES)</b>	Programa Catalunya Clusters (Catalonia Clusters Programme)	n.a.	n.a.	n.a.	n.a.
 <b>Asturias (ES)</b>	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>9</sup>, since SMEs and other cluster actors can significantly benefit from excellent cluster organisations.<sup>10</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 19 programmes have implemented the Cluster Management Excellence Labelling Approach according to the ECEI as a mandatory programme component (s. Fig. 6).

<sup>9</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>10</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

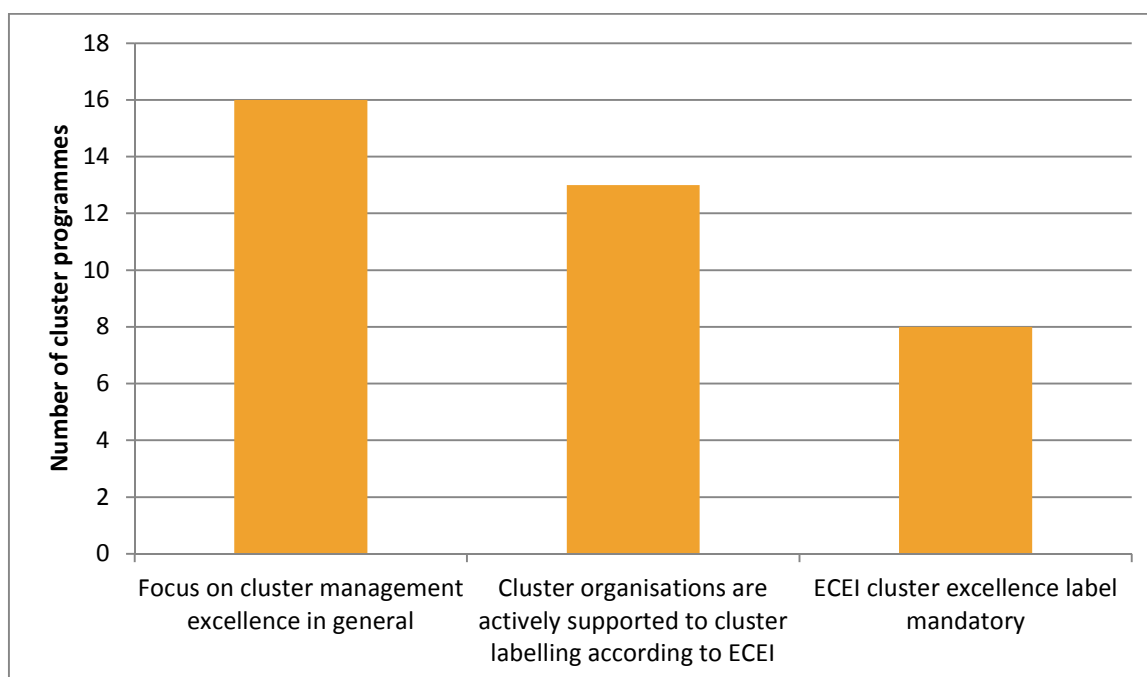














Table 8: Role of cluster management excellence in the surveyed programmes

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
 <b>Czech Republic</b>	Clusters – Cooperation	x	x	x
 <b>Denmark</b>	Innovation Networks Denmark	x	x	x
 <b>France</b>	Pôles de Compétitivité	x		
 <b>Germany</b>	go-cluster	x	x	x
 <b>Germany</b>	Leading Edge Cluster Competition	x	x	x
 <b>Greece</b>	Development of Hellenic Technology Clusters in Microelectronics, mi-Cluster Development	x	x	
 <b>Latvia</b>	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Pro-	-	-	-

	gramme			
 <b>Montenegro</b>	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	-	-	-
 <b>Norway</b>	Norwegian Innovation Clusters	x	x	x
 <b>Portugal</b>	Competitiveness Clusters	x	x	
 <b>Romania</b>	Operational Programme "Competitiveness" – OPC	x	x	
 <b>Slovakia</b>	De minimis scheme to support industrial clusters, Clusters Scheme	x		
 <b>Sweden</b>	VINNVÄXT Regional Growth through Dynamic Innovation Systems	x	x	
 <b>Turkey</b>	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
 <b>Lower Austria (AT)</b>	Cluster Programme Lower Austria	x	x	
 <b>Lombardy (IT)</b>	Support activities for the development of the tools foreseen by S <sup>3</sup> of Regione Lombardia	x	x	x
 <b>Hamburg (DE)</b>	Hamburg's cluster policy - Reaching the top together	x	x	x
 <b>Catalonia (ES)</b>	Programa Catalunya Clusters (Catalonia Clusters Programme)	x	x	x
 <b>Asturias (ES)</b>	Clusters Asturias	x	x	

### 5.2.2 Role of Internationalisation Activities

The internationalisation of clusters and their actors is still high on the agenda of policy makers and often an important programme design feature. As shown in Fig. 7 internationalisation plays an important role in most programmes (15 out of 18 programme managers / owners consider this to be at least of medium importance). Consequently, many programmes provide funding of dedicated measures supporting cluster internationalisation (13 out of 18 programmes). Also a high number of programmes (15 out of 18) support the development of new tools, like new cluster management services, to help cluster management to better support SMEs to go international.

Figure 7: Importance and support tool for internationalisation of clusters

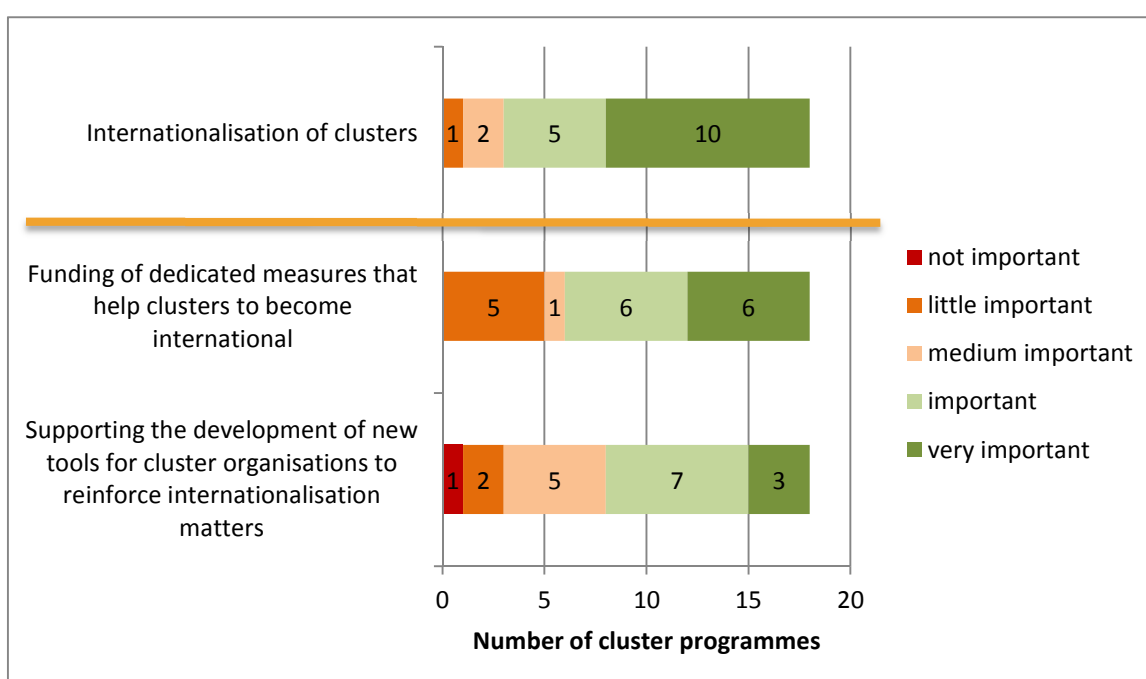








































Table 9: Internationalisation activities

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
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

 <b>Germany</b>	go-cluster	 little important	 little important	 medium important
 <b>Germany</b>	Leading Edge Cluster Competition	 medium important	 important	 little important
 <b>Greece</b>	Development of Hellenic Technology Clusters in Microelectronics, micro-cluster Development	 very important	 very important	 important
 <b>Latvia</b>	Operational Programme „Entrepreneurship and Innovations”, Activity 2.3.2.3. Cluster Programme	 very important	 very important	 important
 <b>Montenegro</b>	Enhancing Competitiveness of local SMEs in Montenegro through Cluster Development	 very important	 very important	 very important
 <b>Norway</b>	Norwegian Innovation Clusters	 very important	 little important	 little important
 <b>Portugal</b>	Competitiveness Clusters	 very important	 very important	 important
 <b>Romania</b>	Operational Programme “Competitiveness” – OPC	 important	 important	 important
 <b>Slovakia</b>	De minimis scheme to support industrial clusters, Clusters Scheme	 medium important	 important	 medium important
 <b>Sweden</b>	VINNVÄXT Regional Growth through Dynamic Innovation Systems	 very important	 important	 medium important
 <b>Turkey</b>	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 S <sup>3</sup> 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

The new survey cluster programmes in Europe has yielded some very interesting key findings and trends, which are summarised in Table 10. Clusters and cluster programmes are still high on the agenda of regional and national policy makers, although the number of programmes has significantly decreased. Most of 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 them contain 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 in the specific characteristics of the different cluster programmes and give guidance for the future development of cluster programmes.






Table 10: Overview of key findings

<b>Key findings and trends of cluster programmes in Europe</b>	
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 since 2008. Today, focus is much more given to support matured clusters, world class clusters and clusters in Emerging Industries. In the past, almost all types of clusters were supported. Catching up countries are an exception since they mainly focus on supporting embryonic clusters or the set-up of cluster initiatives.
3.	Cluster management excellence is in the focus of almost all cluster programmes today; this was not the case three years ago.
4.	Going international 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 organisation have 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 contain 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




Table 12 provides an overview for each cluster programme about its term, budget, and type of funding, technology focus, funding periods, maximum funding and financing structure of projects.

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

Country	 Czech Republic	 Denmark	 France	 Germany	 Germany
<b>Name</b>	Clusters – Cooperation	Innovation Networks Denmark	Pôles de Compétitivité	go-cluster	Leading Edge Cluster Competition
<b>Term of the programme</b>	2015-2020	2010-2018	2013-2018	2012-2015	2009 – 2015
<b>Budget</b>	70 Million EUR	10 Million EUR p.a.	450 Million EUR for first three years	1 Million EUR p.a.	600 Million EUR
<b>Type of funding</b>	co-financing, support 40% – 50%	Grant distributed among coordinating organisation (secretariat) and other partnering public and not-for-profit knowledge organisations.	grant	“Technical Assistance” + basic funding for cluster management	grant
<b>Does the programme have a specific technology focus?</b>	no	no	no	no	no
<b>Maximum funding period for a project</b>	36 months	48 months with possibility of extension	60 months	9 months	60 month
<b>Is there a maximum amount of funding an applicant can apply for?</b>	around 3 Million EUR	around 1 Million EUR p.a.	5 Million EUR	40.000 EUR	40 Million EUR
<b>Financing structure of projects</b>	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%	co-financing, 50%	Co-financing, up to 50 %

Country	 Greece	 Latvia	 Montenegro
<b>Name</b>	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>	2008-2015	2012-2015	2014-2016
<b>Budget</b>	60 Million EUR	5 Million EUR	500.000 EUR
<b>Type of funding</b>	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>	yes Nano/Microelectronics-based Systems & Applications	no	No
<b>Maximum funding period for a project</b>	Open	4 years	open
<b>Is there a maximum amount of funding an applicant can apply for?</b>	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>	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 mini-mum 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

<b>Country</b>	 Norway	 Portugal	 Romania
<b>Name</b>	Norwegian Innovation Clusters	Competitiveness Clusters	Operational Programme "Competitiveness" – OPC
<b>Term of the programme</b>	2014 – ongoing	2015-2020	2015-2020
<b>Budget</b>	-	-	620 Million EUR
<b>Type of funding</b>	Grant	grant	grants (non-refundable financial assistance in one or more instalments)
<b>Does the programme have a specific technology focus?</b>	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
<b>Maximum funding period for a project</b>	3 sub-programmes: Arena 5 years, NCE 10 years, GCE 10 years	5 years	5 years
<b>Is there a maximum amount of funding an applicant can apply for?</b>	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
<b>Financing structure of projects</b>	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
<b>Name</b>	De minimis scheme to support industrial clusters, Clusters Scheme	VINNVÄXT Regional Growth through Dynamic Innovation Systems	Cluster Support Programme
<b>Term of the programme</b>	2015	2002 - 2022	2015 - ongoing
<b>Budget</b>	130.000 EUR	8,5 Million EUR p.a.	10 Million EUR
<b>Type of funding</b>	Grant	grant	grant
<b>Does the programme have a specific technology focus?</b>	No	No	activities in specific technologies such as biotechnology, nanotechnology and ICT bonus points are granted in evaluation
<b>Maximum funding period for a project</b>	9 months	10 years	5 years
<b>Is there a maximum amount of funding an applicant can apply for?</b>	20.000 EUR	1 Million EUR	10 Million EUR
<b>Financing structure of projects</b>	70 % intensity of aid (refund), 30 % co-financing		50 % of the total business plan budget will be supported as a grant from national budget

<b>Region</b>	 Lower Austria (AT)	 Region Lombardy (IT)	 Region Hamburg (DE)
<b>Name</b>	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
<b>Term of the programme</b>	2015-2020	2014-2015	2010 - ongoing
<b>Budget</b>	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.)
<b>Type of funding</b>	"Technical Assistance" + basic funding for cluster management	Regional funds and ERDF	varies
<b>Does the programme have a specific technology focus?</b>	No	No	No
<b>Maximum funding period for a project</b>	No	2 years	No
<b>Is there a maximum amount of funding an applicant can apply for?</b>	No	100.000 EUR	Varies
<b>Financing structure of projects</b>	Public: Regional funds: 40% ERDF: 50% Private (membership fees, sponsoring): 10%	100% regional finance	varies

<b>Region</b>	 Region Catalonia (ES)	 Region Asturias (ES)
<b>Name</b>	Programa Catalunya Clusters (Catalonia Clusters Programme)	Clusters Asturias
<b>Term of the programme</b>	2014 – ongoing	2008 - ongoing
<b>Budget</b>	None	250.000 EUR
<b>Type of funding</b>	None, service programme	grant
<b>Does the programme have a specific technology focus?</b>	No	no
<b>Maximum funding period for a project</b>	None	1 year
<b>Is there a maximum amount of funding an applicant can apply for?</b>	No	Yes. It depends on the project Creation: 40.000,00 €, Governance, studies: 60.000,00 € Collaborative projects: 125.000,00 €
<b>Financing structure of projects</b>	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/>