



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

# Country factsheet

Poland

An initiative of the European Union





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## Introduction

This document presents an overview of the cluster policy in Poland. Given the importance to contextualise the cluster policies (and related) analysed in the factsheets, a comprehensive outlook of the country in socioeconomic terms can be consulted in the [European Semester Country Report for Poland](#). The European Semester was an instrument introduced to coordinate the EU Member States economic policies and address the economic challenges faced by the EU. Its goals are “to ensure sound public finances, to prevent excessive macroeconomic imbalances in the EU, to support structural reforms to create more jobs and growth, and to boost investment”. Thus, it focuses on the following areas: business environment; financial and fiscal stability; green economy; public administration; labour market and skills; and, social protection and cohesion.

The COVID-19 pandemic has caused an unprecedented economic shock to the European and global economy. In response, policymakers at EU and national level have acted decisively and at short notice to make available very significant financial resources, notably through the Recovery and Resilience Facility, to tackle the threat of a prolonged downturn. [National recovery and resilience plans](#) have been drafted in each Member State to ensure a recovery that addresses the challenges identified in the European Semester. The measures of Poland’s Recovery and Resilience Plan are built on six pillars: green transition, digitalisation, health, competitiveness and innovation, sustainable transport, and the quality of institutions, whereby clusters have been included in the National Recovery and Resilience Plan in relation to the goal of increasing the use of renewable energy sources. In addition to pandemics, the ongoing Russian military aggression on Ukraine has also taken its toll on EU companies and industrial ecosystems, highlighting the significance of policy efforts in supporting SMEs and clusters.

In the following, a succinct overview of the cluster policy in Poland will be provided. The structure -of this factsheet generally encompasses:

- 1) an overview of the industrial ecosystems and cluster landscape in Poland,
- 2) an overview of the national cluster policies and an insight into the regional cluster policy,
- 3) an assessment of the state of play of the national cluster policy.

01

# Industrial ecosystems and cluster landscape



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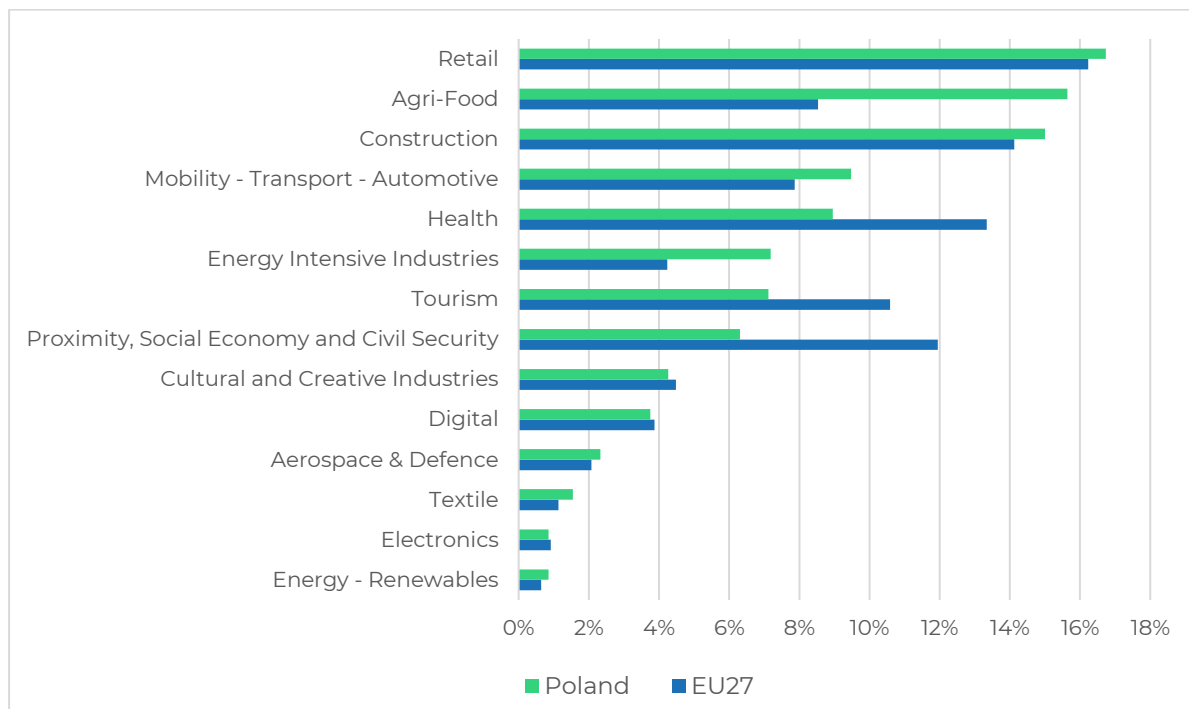
# 1. Industrial ecosystems and cluster landscape

## Employment in the 14 ecosystems in the country

As part of its Industrial Strategy (March 2020), the European Commission has selected 14 industrial ecosystems that are particularly relevant in Europe and encompass all players operating in a value chain.<sup>1</sup> The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2-digit activities, following the methodology established in the European Commission.<sup>2</sup>

In the following figure, the employment share of the region and the EU27 on average in each industrial ecosystem is shown relative to the number of employed persons in the 14 industrial ecosystems. The ecosystems are ordered, from top to bottom, according to the amount of employment in the country. When the bar for the country is higher than that of the EU27, it indicates that the country is more specialised in that ecosystem. When looking at the Polish employment in the ecosystems, a strong focus on retail, agri-food, construction and mobility-transport-automotive becomes visible which is above the EU27 average. While Poland has a significant number of employees in the health sector and tourism sector, the number remains under the EU27 average. However, Poland has an above employment share in the energy intensive industry ecosystem.

**Figure 1: Employment in the ecosystems**



Source: ECCP (2022), own elaboration based on data from Eurostat.

<sup>1</sup> see here for more information <https://clustercollaboration.eu/in-focus/industrial-ecosystems> (last access 09.01.2023).

<sup>2</sup> see European Commission (2021): Annual Single Market Report, SWD(2021)351.



## Regionally relevant nodes (agglomerations)

Economic activity, and therefore employment, is not equally distributed in all regions. Specialisation can be measured through Location Quotients (LQ) that reflect the relative specialisation of an activity in a region compared to the EU average. If the LQ for a given activity-region combination is above 1.5, it is considered a specialisation node, and if the activity accounts for at least 1 % of total employment in the region, it is considered regionally relevant.<sup>3</sup>

The following tables shows the total number of regionally relevant specialisation nodes (agglomerations) in each region in the country and identifies the top five most specialised of these nodes. The first table focuses on the 88 NACE 2-digit activities or sectors, totalling 148 in the country, while the second table is based on the 14 ecosystems, which total 38 in the country.

**Table 1: Number of regionally relevant sectoral nodes and Top 5 nodes by region (NACE)**

Region	Number of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
<b>PL21: Małopolskie</b>	8	C16 - Manuf. of wood products	C24 - Manuf. of basic metals	F41 - Construction	A01 - Crop & animal production	F42 - Civil engineering
<b>PL22: Śląskie</b>	11	B05 - Mining of coal & lignite	C24 - Manuf. of basic metals	C22 - Manuf. of rubber & plastic products	C29 - Manuf. of motor vehicles & trailers	C33 - Repair, installation of machinery
<b>PL41: Wielkopolskie</b>	8	C31 - Manuf. of furniture	C16 - Manuf. of wood products	A01 - Crop & animal production	C22 - Manuf. of rubber & plastic products	C10 - Manuf. of food products
<b>PL42: Zachodniopomorskie</b>	11	C16 - Manuf. of wood products	C33 - Repair, installation of machinery	C31 - Manuf. of furniture	H52 - Warehousing and support activities for transportation	C22 - Manuf. of rubber & plastic products
<b>PL43: Lubuskie</b>	7	C31 - Manuf. of furniture	C16 - Manuf. of wood products	C17 - Manuf. of paper and paper products	C23 - Manuf. of other non-metal mineral products	C29 - Manuf. of motor vehicles & trailers
<b>PL51: Dolnośląskie</b>	7	B07 - Mining of metal ores	C27 - Manuf. of electrical equipment	C29 - Manuf. of motor vehicles & trailers	C22 - Manuf. of rubber & plastic products	C31 - Manuf. of furniture
<b>PL52: Opolskie</b>	14	C31 - Manuf. of furniture	C16 - Manuf. of wood products	C23 - Manuf. of other non-metal mineral products	C27 - Manuf. of electrical equipment	C25 - Manuf. of fabricated metal products
<b>PL61: Kujawsko-pomorskie</b>	7	C17 - Manuf. of paper products	C31 - Manuf. of furniture	A01 - Crop & animal production	C22 - Manuf. of rubber & plastic products	C25 - Manuf. of fabricated metal products
<b>PL62: Warmińsko-mazurskie</b>	8	C31 - Manuf. of furniture	C16 - Manuf. of wood products	C22 - Manuf. of rubber & plastic products	A01 - Crop & animal production	C23 - Manuf. of other non-metal mineral products
<b>PL63: Pomorskie</b>	10	C33 - Repair, installation of machinery	C26 - Manuf. of computer, electronic & optical products	C16 - Manuf. of wood products	C31 - Manuf. of furniture	D35 - Electricity, gas & steam
<b>PL71: Łódzkie</b>	10	C14 - Manuf. of wearing apparel	C13 - Manuf. of textiles	C31 - Manuf. of furniture	A01 - Crop & animal production	C23 - Manuf. of other non-metal mineral products
<b>PL72: Świętokrzyskie</b>	5	C23 - Manuf. of other non-metal mineral products	A01 - Crop & animal production	D35 - Electricity, gas & steam	F42 - Civil engineering	H49 - Land transport and transport via pipelines
<b>PL81: Lubelskie</b>	5	A01 - Crop & animal production	C31 - Manuf. of furniture	F42 - Civil engineering	C16 - Manuf. of wood products	C10 - Manuf. of food products
<b>PL82: Podkarpackie</b>	11	C30 - Manuf. of other transport equipment	C16 - Manuf. of wood products	C31 - Manuf. of furniture	C22 - Manuf. of rubber & plastic products	C23 - Manuf. of other non-metal mineral products

<sup>3</sup> for more information on the methodology please see the methodology note: <https://clustercollaboration.eu/in-focus/policy-acceleration/country-factsheets-on-cluster-policies-and-programmes> (last access 09.01.2023).



<b>PL84: Podlaskie</b>	7	A01 - Crop & animal production	C16 - Manuf. of wood products	C31 - Manuf. of furniture	C10 - Manuf. of food products	C22 - Manuf. of rubber & plastic products
<b>PL91: Warsaw-Capital</b>	11	J61 - Telecommunications	M73 - Advertising & market research	K65 - Insurance, pension funding	K64 - Financial services	N80 - Security and investigation activities
<b>PL92: Mazowieckie-Regional</b>	8	A01 - Crop & animal production	C10 - Manuf. of food products	D35 - Electricity, gas & steam	H49 - Land transport and transport via pipelines	C23 - Manuf. of other non-metal mineral products

Source: ECCP (2022), own elaboration based on data from Eurostat.

Overall, there are fewer numbers of ecosystem nodes compared to the regionally relevant sectoral nodes by NACE sectors. This more concentrated agglomeration can at least partially be linked to the methodology of measurement of the 14 industrial ecosystems. Poland's ecosystem nodes are heavily focused on energy-intensive industries and agri-food, which can be found – often even both – in the majority of Polish regions. This is reflected in the prevalence of NACE nodes in sectors like wood and furniture industries (C16, C31) and agricultural and food production (A01, C10) or mining (B05), and diverse manufacturing sectors, e.g., the manufacturing of non-metal mineral products (C23), of fabricated metal products (C25) and of rubber and plastic products (C22).

Some specific agglomerations exist in several regions. Łódzkie (PL71), for example, hosts a distinct textile ecosystem node which is also clearly reflected in the NACE nodes as the manufacture of wearing apparel and textiles (C13-14). Śląskie (PL22), Lubuskie (PL43), and Dolnośląskie (PL51) exhibit nodes in the mobility-transport-automotive ecosystem, whereby this is supported by NACE nodes in the manufacture of motor vehicles (C29) in all three regions. Finally, the capital region of Warsaw (PL91) is an outlier with a focus on digital, cultural/creative and aerospace/defence ecosystems. These are echoed in the NACE nodes in telecommunications (J61) for the first, advertising and market research (M73) for the second, and security and investigation activities (N80) for the third ecosystem.

**Table 2: Regionally relevant ecosystem nodes**

Region	Number of ecosystem nodes	Node 1	Node 2	Node 3	Node 4
<b>PL21: Małopolskie</b>	2	Agri-Food	Energy-intensive industries	-	-
<b>PL22: Śląskie</b>	3	Energy-intensive industries	Energy-renewables	Mobility-Transport-Automotive	-
<b>PL41: Wielkopolskie</b>	2	Agri-Food	Energy-intensive industries	-	-
<b>PL42: Zachodniopomorskie</b>	1	Energy-intensive industries	-	-	-
<b>PL43: Lubuskie</b>	4	Energy-intensive industries	Textile	Mobility-Transport-Automotive	Electronics
<b>PL51: Dolnośląskie</b>	3	Energy-renewables	Energy-intensive industries	Mobility-Transport-Automotive	-
<b>PL52: Opolskie</b>	3	Energy-intensive industries	Energy-renewables	Agri-Food	-
<b>PL61: Kujawsko-pomorskie</b>	2	Agri-Food	Energy-intensive industries	-	-
<b>PL62: Warmińsko-mazurskie</b>	2	Agri-Food	Energy-intensive industries	-	-
<b>PL63: Pomorskie</b>	2	Electronics	Aerospace & Defence	-	-



<b>PL71: Łódzkie</b>	4	Textile	Agri-Food	Energy-intensive industries	Energy-renewables
<b>PL72: Świętokrzyskie</b>	2	Agri-Food	Energy-intensive industries	-	-
<b>PL81: Lubelskie</b>	1	Agri-Food	-	-	-
<b>PL82: Podkarpackie</b>	2	Energy-intensive industries	Agri-Food	-	-
<b>PL84: Podlaskie</b>	1	Agri-Food	-	-	-
<b>PL91: Warsaw-Capital</b>	3	Digital	Cultural and creative industries	Aerospace & Defence	-
<b>PL92: Mazowieckie-Regional</b>	1	Agri-Food	-	-	-

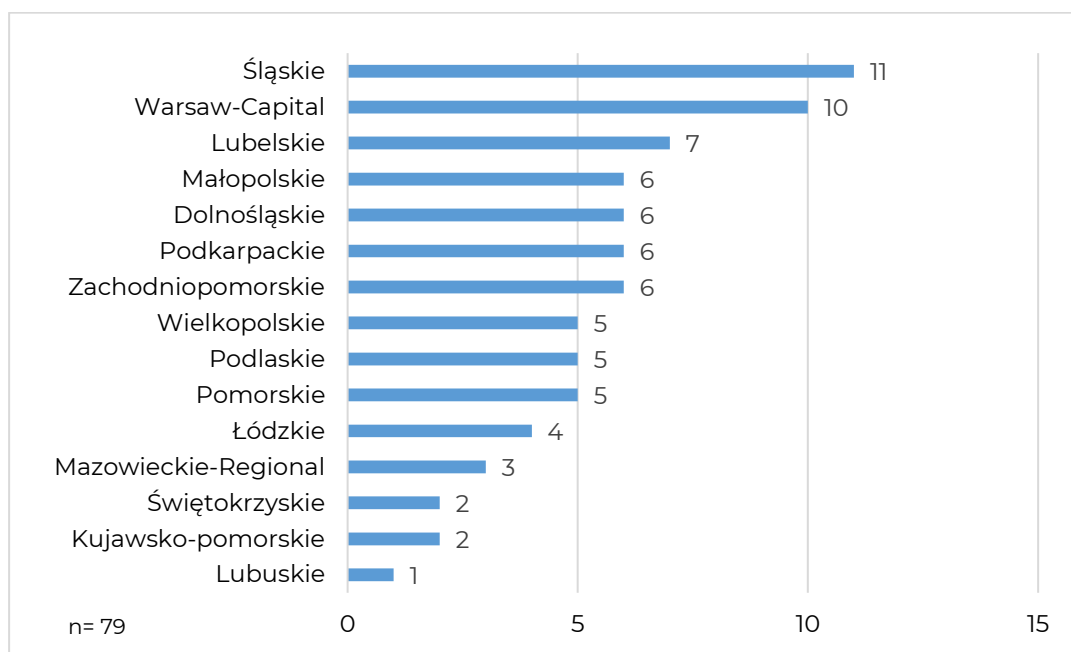
Source: ECCP (2022), own elaboration based on data from Eurostat.

When comparing common nodes of cluster organisations registered on the ECCP and regionally relevant specialisation nodes, a certain difference becomes visible. While Polish regions are mainly focusing in the fields of agri-food (8 regions) and energy-intensive industries (5 regions), Polish cluster organisations registered on the ECCP are mainly active in the ecosystems “digital”, “mobility-automotive-transport” and “renewables”. However, these ecosystems have also a certain importance for the Polish regions.

## Cluster organisations in the regions

There are 79 cluster organisations registered on the ECCP from Poland. The region with the most registered cluster organisations is Śląskie (11 cluster organisations) followed by Warsaw (10 cluster organisations) and Lubelskie (7 cluster organisations). Notably, Opolskie, the region with the most NACE sectorial nodes, has no registered cluster organisations on the ECCP at all, while its neighbouring region of Śląskie leads the ranking. The following figure shows the presence of cluster organisations in the different regions.

**Figure 2: Cluster organisations profiled on the ECCP**







Source: ECCP (2022). Note: the data for the analysis was extracted on 14/10/2022

SMEs (80%, EU: 84%) followed by large enterprises (10%, EU: 9%) and research organisations (9%, EU:7%) constitute the majority of member organisations of Polish cluster organisations with profiles on the ECCP. From a thematic perspective, these Polish cluster organisations are operating in the following industrial ecosystems. Since not all cluster organisations on the ECCP provided this information, the number of cluster organisations with an allocated industrial ecosystem is lower than the overall number of cluster organisations in the country.

- Digital (7 cluster organisations)
- Mobility-Transport-Automotive (6 cluster organisations)
- Renewable Energy (6 cluster organisations)
- Construction (3 cluster organisations)
- Health (2 cluster organisations)
- Agri-food (2 cluster organisations)
- Aerospace & Defence (2 cluster organisations)
- Creative & Cultural Industries (1 cluster organisation)
- Textile (1 cluster organisation)

# 02

## National cluster policy, programmes and initiatives



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## 2. National cluster policy, programmes and initiatives

In this section we provide an overview of the existing cluster policies in Poland on a national as well as an example of the regional level cluster policy. The breakdown is presented in the form of a table, with the first column showcasing information on the aspects which constitute the policy (beginning with 'Policy Objectives', following with 'Policy Focus', etc.). The second and third column represents the case of Polish national cluster policies, whilst the fourth represents an exemplary regional cluster policy in Poland. This factsheet showcases an example of a regional broad policy in Poland for one of 16 Polish regions: Mazovia Region. To gain an insight to the previous factsheet of 2021, one can follow this link: [Country Factsheet 2021](#) (access via ECCP registration).

Within the table the text presented in bold (black) depicts standardised categories across country factsheets (56 in total for 2022), which are applied for comparative purposes. This is followed by a complementary descriptive text to provide more insights about the cluster policy in Poland.



There is a new ERDF funded Operational Programme for 2021-27 period which explicitly mentions support for clusters. [Program - Ministerstwo Funduszy i Polityki Regionalnej \(poir.gov.pl\) Please, describe.](#)

Policy type:	National cluster policy	National cluster policy	Regional broad policy
Policy name:	Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazova until 2030
<b>POLICY OBJECTIVES</b> 	<b>Increasing competitiveness and boosting scale up of SMEs</b> <b>Supporting internationalisation activities</b> <b>Enhancing the visibility of clusters</b> <b>Fostering R&amp;D activities, technology development and implementation</b> <b>Supporting cluster excellence and professionalisation of cluster management</b> <b>Promoting entrepreneurship, start-ups and spin-offs</b>	<b>Strengthening cooperation between companies or industry and RTDI actors</b> <b>Increasing competitiveness and boosting scale up of SMEs</b> <b>Supporting internationalisation activities</b> <b>Fostering R&amp;D activities, technology development and implementation</b> <b>Fostering innovation and strengthening innovation ecosystems</b> <b>Supporting cluster excellence and professionalisation of cluster management</b>	<b>Strengthening cooperation between companies or industry and RTDI actors</b> <b>Increasing competitiveness and boosting scale up of SMEs</b> <b>Supporting internationalisation activities</b> <b>Fostering R&amp;D activities, technology development and implementation</b> <b>Fostering innovation and strengthening innovation ecosystems</b>




Policy type:	National cluster policy	National cluster policy	Regional broad policy
Policy name:	Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazovia until 2030
	<p><b>Strengthening the network of cluster organisations/cross-clustering</b></p>	<p><b>Promoting entrepreneurship, start-ups and spin-offs</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p>	<p><b>Promoting entrepreneurship, start-ups and spin-offs</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p>
	<p>The aim of the Internationalisation of National Key Clusters competition is to finance comprehensive services supporting the adaptation and introduction or strengthening of the cluster's offer or products on foreign markets, with particular emphasis on technologically advanced products and support of SMEs.</p>	<p>The main purpose is to increase the competitiveness and innovation of SMEs and enhance their cooperation with the R&amp;D sector across various industries. This will help with creating new technologies via establishing cooperation between enterprises, research institutions, business environment institutions, non-governmental organisations and local authorities.</p>	<p>The support for regional cluster development is in line with the strategic and development goals of the Development Strategy for the Mazowieckie Voivodeship until 2030. The development of clusters is mainly focused on the development of enterprises within the cluster and enhancing innovation, including the creation of new companies and their internationalisation (e.g. in the form of foreign investments). The regional cluster strategy of Mazowsze is in line with goals of the national intelligent specialisation programme: research and development (R&amp;D) activity, support for the international expansion of enterprises, improving the quality of human capital in enterprises, stimulating industry cooperation, creation of new enterprises. The support will cover key clusters/cluster initiatives that are in line with the selected smart specialisation areas of the region.</p>




Policy type:	National cluster policy	National cluster policy	Regional broad policy
Policy name:	Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazova until 2030
<b>POLICY FOCUS</b> 	<b>No specific focus</b>  The policy does not focus on one specific sector but promotes internationalisation of various sectors.	<b>Cross-sectoral</b>  The policy does not focus on one specific sector but rather focuses on the cross-sectoral cooperation between various actors of KKKs.	<b>Cross-sectoral</b>  An important element of the Regional Innovation Strategy of Mazowsze is to increase competitiveness of the region through cooperation between clusters operating within the same industrial areas across various geographical locations. The result of such cooperation are often the so-called meta-clusters internationally across key industries, leading to increase the competitiveness of Central Europe. The following clusters are key for the region: ICT, medical sector, construction sector, renewable energy and energy efficiency.
	<b>RESPONSIBLE AUTHORITIES</b> 	<b>Drafting as well as implementation</b> <b>The provision of funding</b> <b>The oversight of implementation</b>  Ministry of Development and Technology, through the Smart Growth Operational Programme is the main responsible authority and funding source.  Polish Agency for Enterprise Development (PARP) is involved in the evaluation of proposals and selection of the candidates of the competitions.	<b>Drafting as well as implementation</b> <b>The provision of funding</b> <b>The oversight of implementation</b>  Ministry of Development and Technology as the main responsible authority and funding source, as well as the selection of Key National Clusters.



Policy type:	National cluster policy	National cluster policy	Regional broad policy
Policy name:	Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazovia until 2030
<b>BENEFICIARIES</b> 	<b>Cluster organisations (National Key Clusters and their members)</b>  <b>SMEs</b>	<b>SMEs</b>  <b>Cluster organisations</b>  <b>Research organisations</b>  <b>Start-ups</b>  <b>Business associations</b>  <b>Technology centres</b>  <b>Policy makers</b>	<b>SMEs</b>  <b>Cluster organisations</b>  <b>Start-ups</b>
	<p>The programme is dedicated to organisations that have the status of Key National Clusters. Organisations can participate through their cluster coordinator or as an individual cluster member implementing a project.</p>	<p>The competition is dedicated to clusters that are applying for renewal of the KKK status and clusters applying for obtaining a status of the KKK. The cluster is a source of benefits and creates a new value for all types of entities participating in the cluster, such as enterprises, universities and other scientific units, business environment institutions, public administration, and other supporting organizations.</p>	<p>Support for the cluster initiative takes place on two levels:</p> <p>Level 1: support aimed at cluster coordinators in order to increase the internationalization and innovation of clusters and to strengthen their competitiveness in the process of applying for international support instruments. At this level, the aid will focus on soft projects, with no possibility of co-financing the purchase of fixed assets (or only in the minimum amount).</p> <p>Level 2: support for entrepreneurs included in the cluster for the implementation of projects aimed at achieving a specific market effect; the support will not include activities in the</p>



Policy type:		National cluster policy	National cluster policy	Regional broad policy
Policy name:		Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazovia until 2030
				field of strengthening the cluster organization, appropriate for Level 1.
<b>INSTRUMENT</b> 	<b>Financial</b>	<p><b>Subsidies to hire personnel</b></p> <p><b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b></p> <p><b>Financing networking events</b></p> <p><b>Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)</b></p>	<p><b>Funding collaboration initiatives</b></p> <p><b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b></p> <p><b>Application to labelling schemes and similar initiatives</b></p> <p><b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b></p> <p><b>Financing networking events</b></p> <p><b>Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)</b></p> <p><b>Financing start-ups</b></p> <p><b>Innovation: voucher, support to hire PhDs, cooperation with R&amp;I actors</b></p>	<p><b>Funding collaboration initiatives</b></p> <p><b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b></p> <p><b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b></p> <p><b>Financing networking events</b></p> <p><b>Innovation: voucher, support to hire PhDs, cooperation with R&amp;I actors</b></p>
	<b>Technical assistance</b>	<p><b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b></p> <p><b>Support for soft skills development: coaching, management training, upskilling/reskilling</b></p>	<p><b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b></p> <p><b>Support for soft skills development: coaching, management training, upskilling/reskilling</b></p>	<p><b>Support for soft skills development: coaching, management training, upskilling/reskilling</b></p> <p><b>Support for networking and partnership building (at national and/or international level)</b></p> <p><b>Marketing activities: advertising, communication, events, fairs, and so on</b></p>



Policy type:	National cluster policy	National cluster policy	Regional broad policy
Policy name:	Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazova until 2030
	<p><b>Support for networking and partnership building (at national and/or international level)</b></p> <p><b>Marketing activities: advertising, communication, events, fairs, and so on</b></p>	<p><b>Support for networking and partnership building (at national and/or international level)</b></p> <p><b>Marketing activities: advertising, communication, events, fairs, and so on.</b></p>	
	<p><b>Explanation</b></p> <p>The purpose of financing is the development and introduction to foreign markets of products and services offered by National Key Clusters and their members. Clusters can receive co-financing for certain activities (see listed above) that enhance such international cooperation. The total project cost must amount to EUR 2,27 million (PLN 10 million). Participants can receive a maximum of EUR 1.8 million (PLN 8 million), which means that at least 20% of self-financing the total cost of the project is required. The type of financing that can be obtained differs depending if you apply as a cluster coordinator or cluster member.</p> <p>The cluster manager receive subsidies for: administrative costs and remuneration for the personnel participating in the project; expert services, including market research, audits, evaluation research; services for the design, creation, maintenance and development of ICT tools; marketing; management of the cluster facilities,</p>	<p>The coordinator of the National Key Cluster is entitled to apply for public support under the instruments of the Smart Growth Operational Programme 2014-2020. Applications of consortia consisting of a group of members of the KKK will benefit from preferences under the assessment system when applying to various programs and assistance activities. The instruments listed here have been deducted from more general programme description (e.g. the overall objectives of the policy).</p> <p>Obtaining the status of a Key National Cluster does not automatically grant access to financing. There are competitions in the framework of the Smart Growth Operational Programme that are available exclusively for KKK.</p>	<p>The information about financial instruments and technical assistance is limited. The instruments listed here have been deducted from more general programme description (e.g. the overall objectives of the policy). One of the evaluation criteria for project selection is representation of different levels of the common value chain (i.e. infrastructure provision, human resource management, technology, research and development, procurement, logistics, production and service provision, marketing and sales, service and utilization), created by cluster members to achieve the goals cluster.</p>






Policy type:	National cluster policy	National cluster policy	Regional broad policy	
Policy name:	Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazovia until 2030	
	organization of training programs, workshops and conferences for support, knowledge sharing, networking and international cooperation. Cluster members receive subsidies for: advisory services and training in the field of operations on foreign markets; participation in economic missions; participation in the fair as an exhibitor; access to foreign research and development infrastructure; promotion of brands and products.			
<b>HISTORY</b> 	<b>Period</b>	<b>Limited period</b>	<b>Unlimited period</b>	<b>Limited period</b>
	<b>Ending year</b> <i>(for policies with limited period)</i>	2023		2030.
	<b>Starting year</b>	2014	2015	2021
	<b>Explanation</b>	The archive of PARP provides results of the competition from previous calls (e.g. from 2018).	The programme was created based on the recommendations of the Working Group on Cluster Policy in 2012 that established the basis of the cluster policy in Poland until 2020. The	The conditions for the implementation of RIS Mazovia until 2030 are also outlined by the Agenda for sustainable development 2030 (Agenda 2030) and European



Policy type:		National cluster policy	National cluster policy	Regional broad policy
Policy name:		Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazova until 2030
			first round of competitions started in 2015 and was initially planned until 2018. After that, the programme was prolonged with no specific time limit.	strategies - European Green Deal and European Industrial Strategy.
<b>BUDGET</b> 	<b>Overall</b>	Around EUR 33.25 million	N/A	N/A
	<b>Annual</b>	N/A	N/A	N/A
	<b>Source of funding</b>	National and EU funds within Smart Growth Operational Programme (measure 2.3 Pro-innovative services for enterprises / 2.3.3 Internationalization of National Key Clusters)	National and EU funds within Smart Growth Operational Programme (measure 2.3 Pro-innovative services for enterprises)	National funds and funds of the local authorities of Mazowsze as well as EU funds.
<b>POLICY EVALUATION</b> 	<b>Availability</b>	<b>No policy evaluation</b>	<b>Ex-post</b>	<b>Ex-post</b>
	<b>Results</b>	No publicly available evaluation has been identified for this policy. A mid-term evaluation of the Smart Growth Operational Programme covered measure 2.3. The report is available in Polish ( <a href="http://www.poir.gov.pl">www.poir.gov.pl</a> ) - <i>Ewaluacja mid-term postępu rzeczowego Programu Operacyjnego Inteligentny Rozwój 2014-2020</i>	Based on the 2018 evaluation of the three rounds of the competitions organised between 2015-2018, a new fourth competition was prepared for 2020. The evaluation is not publicly available but based on the decision to prolong the programme one can assume that it was positive. Within the evaluation strategic development areas were designated within cluster policy in Poland. A new monitoring and evaluation tool is being implemented (October 2020) The next round of competition for the status of the National Key Cluster has been	Mazovian Innovation Council is responsible for the evaluation and assessment of the innovation policy of the region.



Policy type:	National cluster policy	National cluster policy	Regional broad policy
Policy name:	Internationalization of the Key National Cluster Programme	Key National Clusters (KKK)	Regional Innovation Strategy for Mazova until 2030
		launched in 2022. The deadline for recruitment: June - September 2022	
<p><b>POLICY ALIGNMENT WITH</b></p> <p><b>THE EU</b></p>  <p><b>PRIORITIES</b></p>			<p><b>Green economy</b></p> <p><b>Digitalisation</b></p>

03

## State of play of cluster policy



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### 3. State of play of cluster policy

This section presents an overview on the state of play of Polish cluster policy in the form of a quantitative and qualitative assessment. The data below illustrates how the country ranks in terms of **maturity of cluster policy at the national level**. The maturity assessment is based on a combination of factors presented in Chapter 2, which receive a score based on the existence or absence of a given element in the cluster policy.

**Note:** the maturity assessment does not reflect the performance of a country, but only the degree of development of their national cluster policy at the moment of data collection (Q3 2022). The assessment illustrates how the country scores for each of the four criteria (policy scope, continuity of cluster policies, evidence of performance, cluster support instruments) compared to the maximum score that they can reach. Please refer to the **Annex** for the detailed overview of the categories and the scoring system.

The table below presents an overview of the **maturity assessment for Poland** for 2022. The total score of Poland is 6,5 points out of 8.

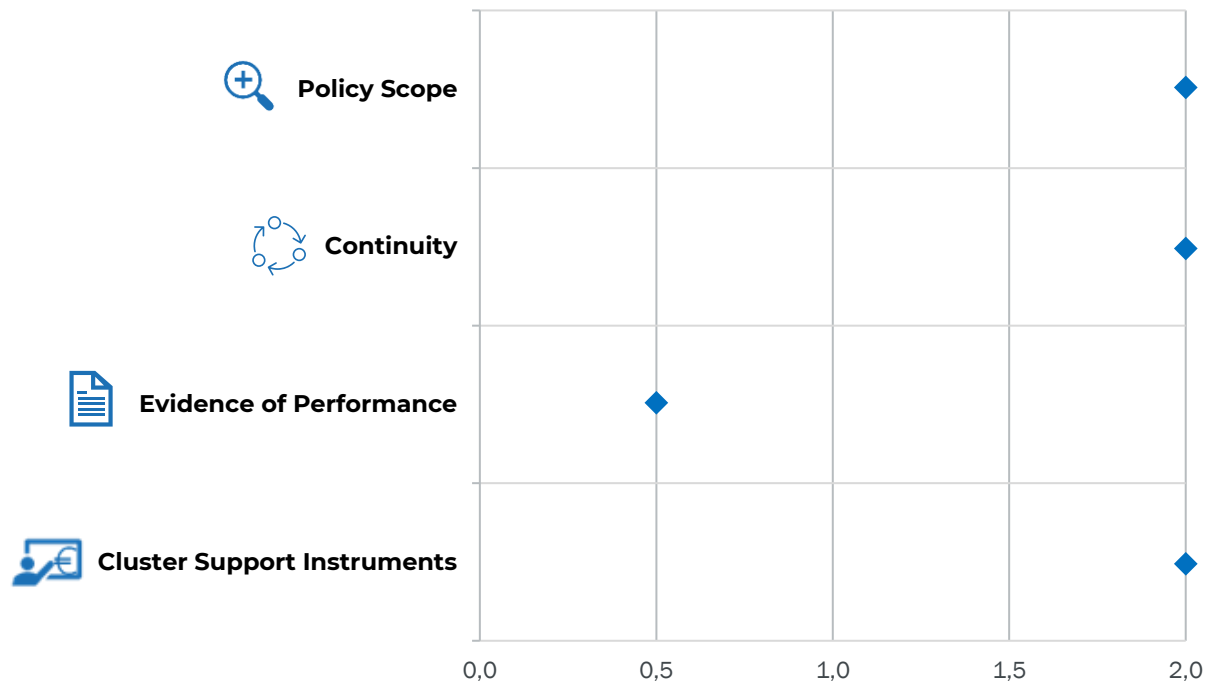
Armenia	MATURITY ASSESSMENT	Max score	Actual score
<b>POLICY SCOPE</b>	Absence of cluster policy	0	
	Broad policy	0,5	
	Sectoral policy	1	
	National and/or regional cluster policy	2	<b>2</b>
<b>CONTINUITY</b>	No cluster-specific policy available	0	
	Cluster policy established recently	0,5	
	Cluster policy established between over 2 and 10 years	1	
	Cluster policy established over 10 years ago	2	<b>2</b>
<b>EVIDENCE OF PERFORMANCE</b>	No evaluation and / or monitoring available	0	
	Existence of evaluations of past policies	0,5	<b>0,5</b>
	Existence of monitoring or an ongoing / interim evaluation	1	
	Existence of monitoring and ex-ante or ongoing / interim evaluation	2	
<b>CLUSTER SUPPORT INSTRUMENTS</b>	No instruments for cluster development	0	
	Financial support for cluster development in the broader and / or sectoral policy	0,5	
	Financial or technical support for cluster development in dedicated cluster policy	1	
	Financial and technical support for cluster development in dedicated cluster policy	2	<b>2</b>
<b>TOTAL (8)</b>			<b>6,5</b>

Source: ECCP (2022)



Drawing from the table above that showcases the scored points in Poland's cluster policy, the Figure below portrays the **degree of maturity** across four categories related to the national level cluster policy.

*Figure 3: Maturity of cluster policy - Poland*



Source: ECCP (2022)

The text below provides a **qualitative description** of the state of play of the cluster policy in Poland, which is complementary to the maturity assessment presented above.

### **Policy scope**

In Poland, there are both the national and also regional cluster policies that focus on the support of activities of cluster organizations in the country. The objective of the Internationalization of the Key National Cluster Programme is to increase the competitiveness and boosting scale up of SMEs, to support the internationalization activities and to enhance the visibility of clusters. In addition, the Key National Clusters initiative deals with strengthening the cooperation between companies or industry and RTDI actors, supporting internationalisation activities, fostering R&D activities, technology development and innovation, as well as supporting cluster excellence and professionalisation of cluster management.

### **Continuity**

It requires an update for 2021-27. Nothing about Klastry Polskie [Związek Pracodawców Klastry Polskie](#)

The cluster policy in Poland at the national level was not defined as an independent policy initially and was rather an element of the long-term formulated innovation policy included within several national programmes starting in 2007. Within the previous financing period 2007-2013 cluster development was supported from public funding within the Operational Programme Innovative Economy. The support was then intended for the development of inter-regional cooperation, in particular joint



investment and advisory services contributing to easier transfer and diffusion of knowledge and innovation between cooperating entities. In 2012 a working group for cluster policy developed a comprehensive strategy and recommendations for the dedicated cluster policy in Poland. This policy is supported within the current financing period 2014-2020. The Working Group on Cluster Policy developed a new strategy "Directions and assumptions of cluster policy in Poland after 2020". A new measure "Development of the potential of the coordinators of the National Key Clusters" has been launched in September 2020.

There is continuity in the national cluster policy in Poland. The initial indirect support for cluster development within the financing period 2007-2013 was transformed into developing a dedicated national cluster policy, that is currently ongoing within the financing period 2014-2020. Therefore, there was no interruption in the cluster policy.

### **Evidence of performance**

Based on a document from Ministry of Economic Development, Labour and Technology (previously Ministry of Entrepreneurship and Technology) from 2019, in 2018 there was evaluation of the system of National Key Clusters. As part of this evaluation strategic development areas of cluster policy in Poland were designed. However, the results of this evaluation are not publicly available.

### **Cluster support instruments**

Within Poland's national/regional cluster policies' support instruments are both financial and technical instruments for creation and further development of clusters, e.g. subsidies to hire personnel, subsidies for cluster infrastructure, support of collaboration initiatives, R&D projects and networking events.

### **Cross-regional / international cooperation**

Polish cluster organizations have been involved in 29 consortia of the European Strategic Cluster Partnerships out of which 13 partnerships were focused on internationalisation (ESCP-4i), 12 partnerships were on cluster management excellence (ESCP-4x) and 4 partnerships were focused on smart specialisation (ESCP-S3). Consortia partners came from 21 different states (DK, FR, ES, RO, PT, IT, EL, RS, DE, BE, BG, CZ, FI, IE, HU, LV, LT, UK, EE, SI, NL). 16 Polish cluster organizations participated in the INNOSUP-1 initiative with partner organizations coming from 27 countries (IL, ES, FR, DE, DK, NL, CZ, IE, BE, PT, IT, SI, NO, HU, EE, LV, RO, AT, SE, UK, EL, IS, RS, LT, FI, BG, GR).

In the 2021-2027 funding period, the Single Market Programme supports clusters as part of the Joint Cluster Initiatives (Euroclusters) for Europe's recovery. From Poland, 8 clusters are part of 8 Euroclusters with partners from 19 countries (AT, BE, CZ, DE, DK, EE, ES, FI, FR, GR, HU, IT, LT, LV, NL, NO, PT, RO, SE). These Euroclusters are AIBC Eurocluster, BioMan4R2, DESIRE, ELBE Eurocluster, GEMSTONE, INGENIOUS, METASTARS and SUAVE. Collectively, they cover seven industrial ecosystems, with "Health", "Renewables", "Aerospace and defence", "Agri-food", "Energy-intensive industries", "Mobility, transport and automotive" and "digital industries".

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## Annex

Criterion of maturity assessment	Description	Scoring (points between 0 and 2)
<b>Policy scope</b>	assessment whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies, e.g. foreign trade policies, labour and social policies or specific sectoral policies, e.g. industrial policy tourism policies, agriculture policies	<b>absence of cluster policy = 0</b> <b>existence of broader policies = 0,5</b> <b>existence of specific sectoral policies = 1</b> <b>existence of targeted cluster policies = 2</b>
<b>Continuity of cluster policies</b>	assessment of the duration and experience of the country in carrying out cluster policies. This criterion assesses only existence of targeted cluster policies and not broader policies or sectoral policies	<b>absence of policies supporting cluster development = 0</b> <b>cluster policy established recently (within the last 2 years) = 0,5</b> <b>cluster policy established between over 2 and 10 years = 1</b> <b>cluster policy established over 10 years ago = 2</b>
<b>Evidence of performance</b>	assessment whether there are evaluations of past and ongoing policies and a monitoring system in place. The existence of monitoring and evaluation mechanisms determines the degree of policy development in the country	<b>no evaluation and / or monitoring available = 0</b> <b>existence of evaluations of past policies, e.g. ex-ante = 0,5</b> <b>existence of monitoring or an ongoing / interim evaluation =1</b> <b>existence of monitoring and ex-ante or ongoing / interim evaluation =2</b>
<b>Cluster Support Instruments</b>	assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support	<b>no instruments for cluster development =0</b> <b>financial support for cluster development in the broader and / or sectoral policy = 0,5</b> <b>financial or technical support for cluster development in dedicated cluster policy = 1</b> <b>financial and technical support for cluster development in dedicated cluster policy = 2</b>

Source: ECCP (2022)