![European Cluster Collaboration Platform logo]

EUROPEAN CLUSTER COLLABORATION PLATFORM

Country factsheet

Spain

Contents

Strengthening the European economy through collaboration

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Introduction

This document presents an overview of the cluster policy in Spain. 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 Spain.](#)

The European Semester is 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 the EU and national levels 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. In Spain, clusters are mentioned in the context of strengthening the public and private research and innovation ecosystem. In addition to the COVID-19 pandemic, the ongoing Russian military aggression against Ukraine has also taken its toll on EU companies and industrial ecosystems, highlighting the significance of policy efforts in supporting SMEs and clusters.

The Recovery Plan includes investments and reforms to promote clusters in renewable energies and digitalisation. The creation of a green cluster for technological and industrial development of energetic storage and the creation of regional clusters and pilot projects to promote the value chain of hydrogen are particularly relevant. Financial grants will also be provided to clusters to support the digitalisation of the value chain of different industrial sectors[1]. Furthermore, the Recovery Plan advances ambitious measures to promote the clusters of the Associations of Innovative Companies, the modernization of companies, the training of managers, and the promotion of entrepreneurship, through the **Spain Entrepreneurial National agenda**[2]. Moreover, clusters are mentioned in the investments of component 13 of the plan focused on promoting SMEs: Digitization and innovation. Includes, among others, subsidy programs for SMEs for the costs of adopting digital solutions and digital transformation, to support value chain digitization projects.

In the following, a succinct overview of the cluster policy in Spain will be provided. The structure of this factsheet generally encompasses:
1) an overview of the industrial ecosystems and cluster landscape in Spain
2) an overview of the national cluster policy and an insight into the regional cluster policy,
3) an assessment of the state of play of the national cluster policy.

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[1] Gobierno de España. Plan de Recuperación, Transformación y Resiliencia. 27 April 2021. Available at: www.lamoncloa.gob.es/temas/fondos-recuperacion/Documents/30042021-Plan_Recuperacion_%20Transformacion_%20Resiliencia.pdf

[2] Gobierno de España. Spain Entrepreneurial Nation. June 2021. https://nacionemprendedora.gob.es/sites/default/files/Spain_Entrepreneurial_Nation.pdf

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01

Industrial ecosystems and cluster landscape

Strengthening the European economy through collaboration

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.[3] The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2 -digit activities, following the methodology established in the European Commission.[4]

In Figure 1, the employment share of Spain and the EU27 in each industrial ecosystem is shown relative to the number of all 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 the EU27 average, it indicates that the country is more specialised in that ecosystem. In Spain, the highest employment shares are found in the industrial ecosystems "Retail", "Tourism" and "Construction". These are also industrial ecosystems where the Spanish employment share is above the average of the EU27 Member States (especially in the ecosystem "Tourism"). Another industrial ecosystem where the Spanish employment share is above the EU27 average is the ecosystem "Proximity, Social Economy and Civil Security".
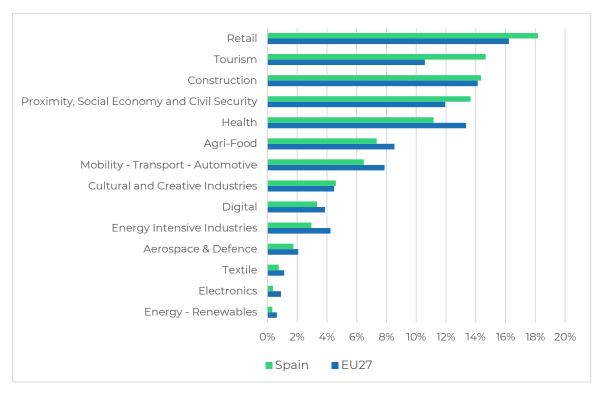
Figure 1: Employment in the ecosystems

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

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[3] see here for more information https://clustercollaboration.eu/in-focus/industrial-ecosystems (last access 09.01.2023)
[4] 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.[5] 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 110 in the country, while the second table is based on the 14 ecosystems, which total 14 in the country.

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

Region	# of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
ES11: Galicia	4	T97 - Households as employers act.	R93 - Sports, amusement, recreation	F41 - Construction of buildings	I56 - Food & beverage services	
ES12: Asturias	7	C24 - Manuf. of basic metals	T97 - Households as employers act.	I56 - Food & beverage services	C33 - Repair, installation of machinery	F41 - Construction of buildings
ES13: Cantabria	7	T97 - Households as employers act.	C24 - Manuf. of basic metals	E38 – Waste collection, treatment & disposal	F41 - Construction of buildings	R93 - Sports, amusement, recreation
ES21: Basque Country	7	. C24 - Manuf. of basic metals	T97 - Households as employers act	C25 - Manuf. of fabricated metal products	C27 - Manuf. of electrical equipment	R93 - Sports, amusement, recreation
ES22: Navarre	5	C29 - Manuf. of motor vehicles & trailers	T97 - Households as employers act.	C10 - Manuf. of food products	C27 - Manuf. of electrical equipment	R93 - Sports, amusement, recreation
ES23: Rioja	6	C15 - Manuf. of leather products	C11 - Manuf. of beverages	T97 - Households as employers act.	F41 - Construction of buildings	C22 – Manuf. of rubber & plastic products
ES24: Aragon	5	T97 - Households as employers act.	C29 - Manuf. of motor vehicles & trailers	C27 - Manuf. of electrical equipment	F41 - Construction of buildings	R93 - Sports, amusement, recreation
ES30: Madrid	9	T97 - Households as employers act.	M73 - Advertising & market research	N82 - Business support activities	J62 - Computer programming, consultancy	R93 - Sports, amusement, recreation
ES41: Castile and Leon	4	T97 - Households as employers act.	F41 - Construction of buildings	C10 - Manuf. of food products	I56 - Food & beverage services	
ES42: Castile-La Mancha	5	T97 - Households as employers act.	F41 - Construction of buildings	A01 - Crop & animal production	R93 - Sports, amusement, recreation	C10 - Manuf. of food products
ES43: Extremadura	3	T97 - Households as employers act.	A01 - Crop & animal production	F41 - Construction of buildings		
ES51: Catalonia	6	T97 - Households as employers act.	N82 - Business support activities	C20 - Manuf. of chemical products	R93 - Sports, amusement, recreation	L68 Real estate activities
ES52: Valencia	6	T97 - Households as employers act	C23 – Manuf. of other non-metallic mineral products.	I56 - Food & beverage services	F41 - Construction of buildings	R93 - Sports, amusement, recreation
ES53: Balearic Islands	6	I55 - Accommodation	F41 - Construction of buildings	T97 - Households as employers act.	I56 - Food & beverage services	R93 - Sports, amusement, recreation
ES61: Andalusia	5	T97 - Households as employers act.	F41 - Construction of buildings	I56 - Food & beverage services	A01 - Crop & animal production	R93 - Sports, amusement, recreation
ES62: Murcia	6	T97 - Households as employers act.	G46-Wholesale trade (not motor vehicles)	A01 - Crop & animal production	C10 - Manuf. of food products	N78 - Employment activities

[5] 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)

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ES63: Ceuta	6	O84 - Public adm., defence, soc. security	T97 - Households as employers act.	P85 - Education	Q87 - Residential care	H52-Warehousing & support for transportation
ES64: Melilla	7	O84 - Public adm., defence, soc. security	P85 - Education	Q86 – Human health activities	T97 - Households as employers act	H52 - Warehousing & support activities for transportation
ES70: Canary Islands	6	I55 - Accommodation	T97 - Households as employers act.	I56 - Food & beverage services	F41 - Construction of buildings	R93 - Sports, amusement, recreation

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. Both Table 1 and Table 2 reflect the relevance of employment related to Construction and Tourism, which is also pointed out in the previous Figure 1. For instance, for a number of Spanish regions, the sector construction of buildings (F41) is among the top 5 regionally relevant sectoral nodes. Moreover, some regions (e.g., Balearic Islands and Canary Islands) display regionally relevant sectoral nodes that are relevant for tourism (e.g., I55 – Accommodation) which is also reflected in their relevant ecosystem node ("Tourism"). Similarly, for a number of other regions (e.g., Castilla-La Mancha and Extremadura) several regionally relevant sectoral nodes related to agriculture (e.g., A01 - Crop & animal production) emerge, which is also found in the regionally relevant ecosystem nodes ("Agri-Food").

Table 2: Regionally relevant ecosystem nodes by region

Region	Number of ecosystem nodes	Node 1	Node 2
ES11: Galicia	0	-	-
ES12: Asturias	0	-	-
ES13: Cantabria	0	-	-
ES21: Basque Country	0	-	-
ES22: Navarre	0	-	-
ES23: Rioja	2	Textile	Agri-Food
ES24: Aragon	0	-	-
ES30: Madrid	2	Digital	Cultural and creative industries
ES41: Castile and Leon	0	-	-
ES42: Castile-La Mancha	1	Agri-Food	-
ES43: Extremadura	1	Agri-Food	-
ES51: Catalonia	0	-	-
ES52: Valencia	1	Textile	-
ES53: Balearic Islands	1	Tourism	-
ES61: Andalusia	0	-	-
ES62: Murcia	1	Agri-Food	-
ES63: Ceuta	2	Health	Proximity, Social Economy & Civil Security
ES64: Melilla	2	Health	Proximity, Social Economy & Civil Security
ES70: Canary Islands	1	Tourism	-

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

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Cluster organisations in the regions

There are 172 cluster organisations registered on the ECCP in the country. The majority of these cluster organisations are located in Catalonia (42 cluster organisations) followed by Andalusia (19 cluster organisation) and Basque Country (18 cluster organisations). Rioja, Extremadura and Castilla-La Mancha are the regions with the lowest numbers of cluster organisations registered on the ECCP. The following figure shows the presence of cluster organisations in the different regions.
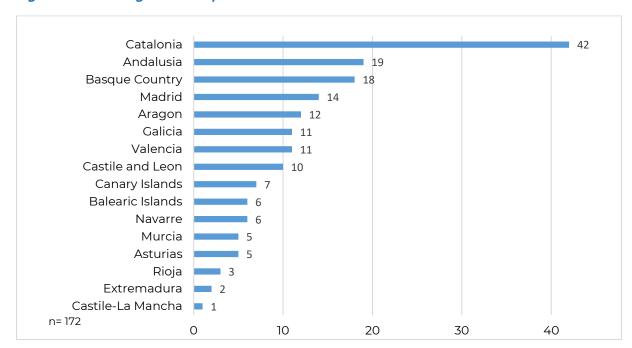
Figure 2: Cluster organisations profiled on the ECCP

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

SMEs (81%, EU: 84%) followed by large enterprises (12%, EU: 9%) and research organisations (7%, EU:7%) constitute the majority of member organisations of Spanish cluster organisations with profiles on the ECCP. From a thematic perspective, these Spanish 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 (19 cluster organisations)
- Agri-food (15 cluster organisations)
- Mobility-Transport-Automotive (9 cluster organisations)
- Tourism (9 cluster organisations)
- Renewable Energy (7 cluster organisations)
- Creative & Cultural Industries (7 cluster organisations)
- Construction (6 cluster organisations)
- Health (6 cluster organisations)
- Aerospace & Defence (4 cluster organisations)
- Textile (3 cluster organisations)
- Energy Intensive Industries (2 cluster organisations)
- Electronics (1 cluster organisation)

02

National cluster policy, programmes and initiatives

2. National cluster policy, programmes and initiatives

In this section, we provide an overview of the existing Spanish cluster policies on a national as well as regional level (example of Catalonia).

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 column represents the case of a Spanish national cluster policy, whilst the third represents an exemplary regional cluster policy in Spain, precisely the example of the regional cluster policy in Catalonia, Spain.

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

Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)
POLICY OBJECTIVES 	**Strengthening cooperation between companies or industry and RTDI actors** **Increasing competitiveness and boosting scale up of SMEs** **Supporting internationalisation activities** **Enhancing the visibility of clusters** **Fostering R&D activities, technology development and implementation** **Fostering innovation and strengthening innovation ecosystems** **Supporting cluster excellence and professionalisation of cluster management**	**Strengthening cooperation between companies or industry and RTDI actors** **Increasing competitiveness and boosting scale up of SMEs** **Supporting internationalisation activities** **Enhancing the visibility of clusters** **Fostering R&D activities, technology development and implementation** **Fostering innovation and strengthening innovation ecosystems** **Supporting cluster excellence and professionalisation of cluster management**

Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)
	Supporting the consolidation of existing cluster organisations **Supporting the creation of new cluster organisations** **Promoting resilience and sustainable economy and other solidarity-based initiatives** **Strengthening the network of cluster organisations/cross-clustering** **Increase supply chain resilience**	**Supporting the consolidation of existing cluster organisations** **Promoting entrepreneurship, start-ups and spin-offs** **Promoting resilience and sustainable economy and other solidarity-based initiatives** **Promoting employment and upgrading skills and competences** **Enhancing territorial cohesion (through Regional Innovation Strategy (RIS3))** **Strengthening the network of cluster organisations/cross-clustering** **Cluster analysis and support for policymaking** **Increase supply chain resilience**
	The national cluster policy in Spain is mainly based on two closely linked elements: the Register of Innovative Business Associations and the Programme to Support Innovative Business Associations, both managed by the Ministry of Industry, Trade and Tourism (MINCOTUR). To be included in the Register, which is a necessary condition to participate in the Programme, the cluster organisations (known as AIEs) must submit a 4-year Strategic Plan. This is then evaluated by a specific Assessment Committee and needs to obtain an "Excellent"	The program wants to implement a cluster policy that tends to excellence in line with the recommendations of the European Commission and the orientation of the main reference countries in this area (Scandinavian countries, Germany, etc.). This approach implies the need to concentrate efforts towards a limited number of initiatives seeking a consistent strategic focus, private leadership, too critical, efficient management of resources and ability to move on a global stage, among others.

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Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)
	qualification. The Strategic Plans provide MINCOTUR with first-rate information about the activities of the AEIs and facilitates the monitoring of their evolution over time as they must be renewed every four years to maintain the validity of the records. As for the Programme, its main objective is to strengthen the role of clusters (or AEIs) as agents capable of promoting cooperation between universities, R&D&I centres and industry to boost competitiveness, innovation and internationalisation and, ultimately, to support SMEs.	
POLICY FOCUS	**Sectoral**	**Cross-sectoral**
	The clusters must be focushed on a specific sector or area of activity. No cross-sectoral clusters are registered.	According to the Catalonia Clusters Program, "cross-sector" projects, in which companies are grouped by their strategic option or their final market, tend to assume a higher aggregate turnover and also a comparatively more significant employment than which corresponds to the initiatives carried out based on industrial microclusters.
RESPONSIBLE AUTHORITIES	**Both drafting and implementation** **Provides funding** **Oversees the implementation**	**Both drafting and implementation** **Provides funding** **Oversees the implementation**

Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)
	The Ministry of Industry, Commerce and Tourism (through the General Secretary of Industry and SMEs) is the responsible authority. aei@mincotur.es	Generalitat de Catalunya info@gencat.cat
BENEFICIARIES 	**SMEs** **Cluster organisations** **Research organisations** **Academic institutions** **Large firms** **Technology centres**	**SMEs** **Cluster organisation** **Start-ups** **Large firms** **Technology centres**
	The beneficiaries are cluster organisations (known as AIE) part of the AIE Register. Two types of AIEs are considered: Emerging: recently constituted AEIs, in the process of consolidation, with an antiquity of a maximum of 4 years from their date of constitution. Excellent: AEIs that demonstrate a high performance in the development of projects and services relevant to the improvement of the competitiveness of the associated companies, in the organisation of their own management structure and in the achievement of a sustainable financial structure. In the case of joint innovation activities, cluster's	The focus of the cluster policy of the Government of Catalonia is on stimulating excellence rather than incorporating all clusters of Catalonia. The program is divided into two calls IRC and NON. IRC is only for the clusters of the program whereas NON is open to all companies in Catalonia. Non is focused on new business opportunities and is divided into strategic change projects and structural change. IRC covers support for competitive reinforcement. It is formed by dynamic agents and competitive projects.

Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)
	members can also be the beneficiaries, with some restrictions, e.g. large companies can only participate in cooperation with an SME.	

INSTRUMENTS			
	Financial	**Funding collaboration initiatives** **Support to R&D projects, SMEs becoming cluster members, etc.** **Subsidies to hire personnel** **Subsidies for cluster infrastructure (e.g. offices, equipment)** **Financing networking events** **Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)** **Innovation: voucher, support to hire PhDs, cooperation with R&I actors**	**Funding collaboration initiatives** **Support to R&D projects, SMEs becoming cluster members, etc.** **Subsidies to hire personnel** **Financing start-ups** **Innovation: voucher, support to hire PhDs, cooperation with R&I actors**
	Technical assistance	**Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.** **Support for networking and partnership building (at national and/or international level)** **Marketing activities: advertising, communication, events, fairs, and so on**	**Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.** **Support for hard skill development: knowledge transfer, intellectual property , entrepreneurship, export advice, market intelligence** **Support for soft skills development: coaching, management training, upskilling/reskilling**

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Policy type:		National cluster policy	Regional cluster policy
Policy name:		Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)
			Support for networking and partnership building (at national and/or international level)
	Explanation	The Programme subsidises different types of actions directed to innovation: 1. Set up and development of coordination and management structures of "emerging" AIEs; 2. Elaboration of technical viability studies: evaluation and analysis of a potential project; 3. Development of innovative activities (e.g. industrial and experimental research, innovation in organisation and processes). 4. Innovation activities and projects in cooperation. The expenses covered by the grants of the Programme are: technical personnel directly involved in the execution of the actions,; external collaborations; interurban travel and accommodation of the technical staff; and, in the actions towards the development of the management and coordination structures, the expenses related to administrative staff and necessary services for the operational management of the entity except financial and investment costs.	Both financial instruments and technical assistance are provided through this program. The program finances innovation projects, competitiveness reinforcement projects, structural change projects and strategic change projects.

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Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)

HISTORY		National cluster policy	Regional cluster policy
	Period	**Unlimited period**	**Limited period**
	Ending year *(for policies with limited period)*	-	2023
	Starting year	2006	2021
	Explanation	The Programme was launched between 2006-2007 and has been active since then. In a first stage, it focused on promoting the formation of an initial set of clusters from which to favour the expansion of the "cluster phenomenon" across Spain. Subsequently, it focused on the search for excellence and the promotion of collaborative actions. Currently, the Programme prioritises digitalisation and value chains, and it is expected that new steps will be taken to promote cluster collaboration with digital innovation hubs. No ending date is mentioned.	Catalonia was one of the pioneer territories at an international level in designing and implementing initiatives for improvement of competitiveness using clusters. Almost three decades of continuous experience have had since their beginnings, in 1992, the essential objective of improving the business competitiveness, understanding the cluster as a tool and not as an objective. Programs are for 3 years. The current program is from 2021 to 2023.

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Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)

BUDGET	Overall	EUR 49,600,000[6]	EUR 5,600,000
	Annual	EUR 7,700,000[7]	n/a
	Source of funding	A combination of Recovery and Resilience Facility founding and budget from the Ministry of Industry, Commerce and Tourism. The overall budget corresponds to the new funding period 2021-2027. The annual budget varies and the number represents the annual average of the previous 2014-2020 funding period.	The budget is divided into the two calls: the budget for IRC is for dynamic agents EUR 800,000 and for competitive projects EUR 1,8 M. In case of the budget of NON is EUR 3M.
POLICY EVALUATION	Availability	**in-itinere**	**in-itinere**
	Results	In 2020, the Ministry published the article "Cluster policy in the Ministry of Industry, Commerce and Tourism. Evolution, results and perspectives.". The document illustrates the results of the Programme since its start. The assessment of the 2007-2013 phase, focused on promoting the formation of clusters, showed very positive results with a total of 160 AIEs registered in 2013 and 515 projects carried out during this time. In the 2014-2020 phase, the priorities changed to focus on the consolidation of the existing clusters. The evaluation of the outcomes is highly positive. The number of clusters registered decreased to 82, but	An annual evaluation process is carried out on the cluster managers, the Project manager team and the presidents of the clusters. The review focuses on the following points: the robustness of the governance, the soundness of the financial model, the management team and the qualitative critical mass.

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[6] See Ministerio de Industria, Comercio y Turismo (2022).

[7] See Ministerio de Industria, Comercio y Turismo (2020b).

Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)
	these integrated more companies and research and technological centres. In particular, these accounted for about 7,500 associated companies providing more than 1.8 million jobs and collaborating with more than 340 technology centres and research organisations. Moreover, the clusters are more professionalised, better organised and especially, more interlinked and internationalised in the framework of EU initiatives such as the "Cluster Excellence" or the ECEI label. The evaluation of the Strategic Plans has also raised the requirements to ensure the impact of the RDI projects is optimal. The information provided by the Strategic Plans and the continuous dialogue with the clusters are of vital importance to plan the actions that make up the cluster policy. Such policy is being developed within the much broader framework of the MINCOTUR industrial policy and its policy to support SMEs, in line with the guidelines issued by the EU and with a clear desire to complement the policies and actions developed on the ground by the Autonomous Communities. The total amount of funds allocated by MINCOTUR to the Programme over its 14 years existence was about EUR 75 million, which in turn served to mobilise another EUR 73.5 million by other public and private sources to finance more than 1,800 projects.	

Policy type:	National cluster policy	Regional cluster policy
Policy name:	Programa de apoyo a Agrupaciones Empresariales Innovadoras (Programme to support Innovative Business Associations)	Catalonia Clusters Program (2021-2023)
POLICY ALIGNMENT WITH THE EU PRIORITIES	**Digitalisation**	**Digitalisation** **Resilience**

03

State of play of cluster policy

3. State of play of cluster policy

This section presents an overview on the state of play of Spanish 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. The regional cluster policy example is not included in this assessment.

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 a detailed overview of the categories and the scoring system.
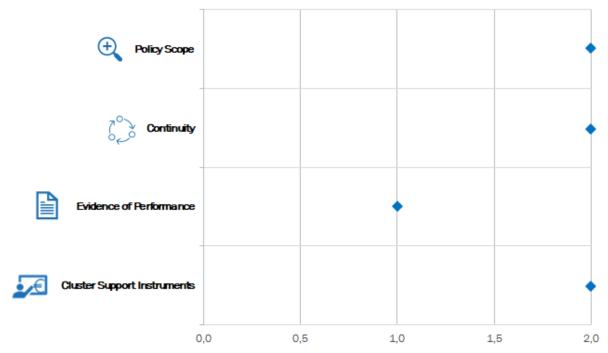
The table below presents an overview of the **maturity assessment for Spain for 2022**. The total score of Spain is 7points out of 8.

Spain	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	
	Sectoral policy	1	
	National and/or regional cluster policy	2	**2**
CONTINUITY	No cluster 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	**2**
EVIDENCE OF PERFORMANCE	No evaluation and / or monitoring available	0	
	Existence of evaluations of past policies	0,5	
	Existence of monitoring or an ongoing / interim evaluation	1	**1**
	Existence of monitoring and ex-ante or ongoing / interim evaluation	2	
CLUSTER SUPPORT INSTRUMENTS	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	**2**
TOTAL (8)			**7**

Source: ECCP (2022)

Drawing from the table above that showcases the scored points in Spain'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 - Spain

Source: ECCP (2022)

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

Policy scope

In terms of policy scope and approach the cluster policy in Spain is characterised by a national coordination of clusters through the national cluster policy and independent regional policies in different regions. Thus, the development and facilitation of cluster initiatives is financed regionally and based on regional strategies. The document explains the regional cluster policy of the Basque Country and Catalonia, two of the Spanish regions with the highest cluster activity.

Continuity

As before mentioned, the national cluster programme (the Programme to Support Innovative Business Associations) and the Register of Innovative Business Associations have been successfully running since 2006-2007, which proofs the continuity of the clusters policy at national level.

Although the objectives of the national cluster policy are shared at regional level, each of the Autonomous Communities have their own policy, mostly developed through regional development agencies. These are aligned with their industrial policies and largely influenced by their RIS3 in terms of specific objectives and instruments.

Evidence of performance

In 2020, the Ministry published the article "Cluster policy in the Ministry of Industry, Commerce and Tourism. Evolution, results and perspectives.". The document illustrates the results of the Programme since its start. The assessment of the 2007-2013 phase, focused on promoting the formation of clusters, showed very positive results, with a total of 160 AIEs registered in 2013 and 515 projects carried out during this time. In the 2014-2020 phase, the priorities changed to focus on the consolidation of the existing clusters. The evaluation of the outcomes is highly positive. The number of clusters registered decreased to 82, but these integrated more companies and research and technological centres. In particular, these accounted for about 7,500 associated companies providing more than 1.8 million jobs and collaborating with more than 340 technology centres and research organisations. Moreover, the clusters are more professionalised, better organised and especially, more interlinked and internationalised in the framework of EU initiatives such as the "Cluster Excellence" or the ECEI label. The evaluation of the Strategic Plans has also raised the requirements to ensure the impact of the RDI projects is optimal.
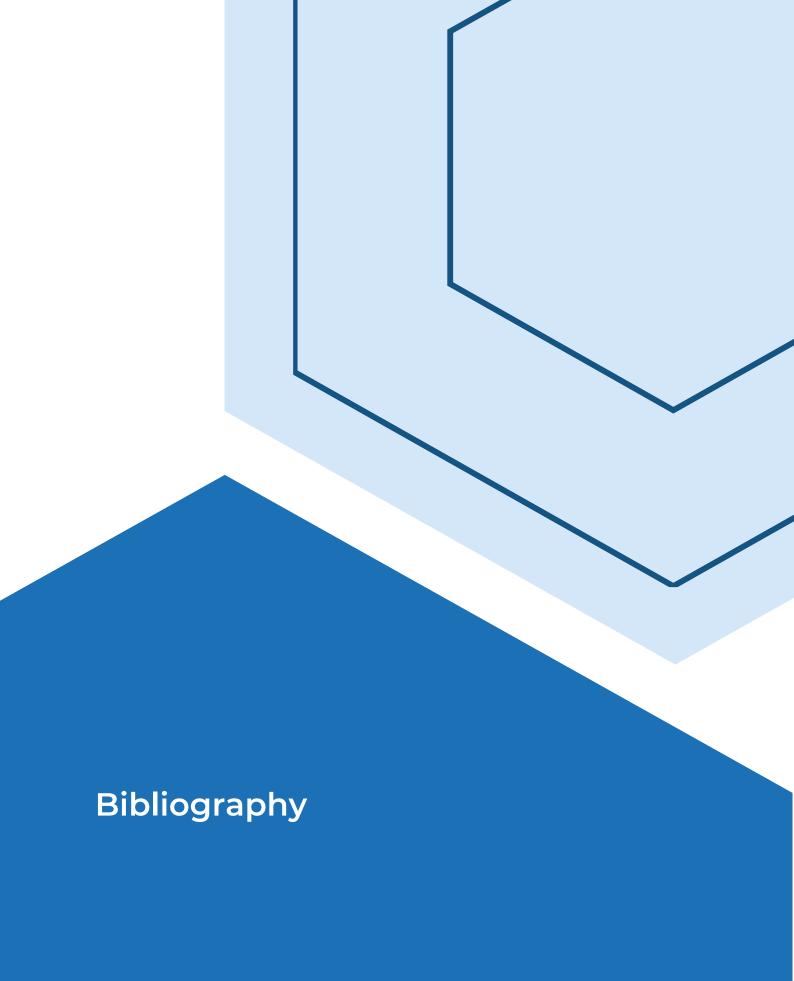
Cluster support instruments

The Spanish clusters policy offers different financial and technical support instruments on a national level mentioned above in the document. Moreover, a National cluster award is organised to successful clusters.

Cross-regional / international cooperation

In the 2014-2020 funding period, the European Cluster Partnerships and the INNOSUP-1 initiative have been launched by the European Commission to encourage clusters from Europe to intensify collaboration across regions and sectors. Spanish cluster organization have been involved in 18 consortia of the European Strategic Cluster Partnerships out of which 13 partnerships were focusing on ESCP-4i, 4 partnerships in ESCP-4x and one partnership were focusing on ESCP-S3. Consortia partners came from 25 different EU member states (AT, BE, BG, CZ, DE, DK, EE, EL, FI, FR, HU, IE, IT, LT, LV, NL, PL, PT, RO, RS, SE, SI, SK, TR, UK). 46 Spanish cluster organizations participated in the INNOSUP-1 initiative with partner organisations coming from 25 countries (AT, BE, BG, CZ, DE, DK, EL, FI, FR, HU, IE, IL, IT, LT, LU, NL, NO, PL, PT, RO, RS, SE, SI, TR, UK).

In the 2021-2027 funding period, the Single Market Programme supports clusters as part of the Joint Clusters Initiatives (Euroclusters) for Europe's recovery. From Spain, 28 cluster organisations are part of 23 Euroclusters with partner from 21 countries (SK, AT, IT, ES, RO, BG, DE, FI, PL, EE, NL, FR, BE, CZ, DK, NO, LT, GR, PT, HU, LV). These Euroclusters are AEC Eurocluster, AIBC Eurocluster, B-Resilient, BioMan4R2, CircInWater, ELBE Euroluster, EPICENTRE, EU Rural Tourism, EuroBoosTEX, FRIEND CCI, IKAT, INGENIOUS, MedBan, METASTARS, POLREC, RE-CENTRE, RESIST, SILEO, Silicon Eurocluster, SocialTech4EU, SUAVE, SUSTAIN and xBUILD-EU. Collectively, they cover all 14 industrial ecosystems. Some Euroclusters cover multiple ecosystems, such as xBUILD-EU (covering "Textile," "Digital," and "Construction") or CircInWater (covering "Agri-food" and "Renewable Energy".[8]

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[8] Assigned Euroclusters to each of the 14 industrial ecosystems is shown on:
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Annex

Criterion of maturity assessment	Description	Scoring (points between 0 and 2)
Policy scope	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	**absence of cluster policy = 0** **existence of broader policies = 0,5** **existence of specific sectoral policies = 1** **existence of targeted cluster policies = 2**
Continuity of cluster policies	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	**absence of policies supporting cluster development = 0** **cluster policy established recently (within the last 2 years) = 0,5** **cluster policy established between over 2 and 10 years = 1** **cluster policy established over 10 years ago = 2**
Evidence of performance	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	**no evaluation and / or monitoring available = 0** **existence of evaluations of past policies, e.g. ex-ante = 0,5** **existence of monitoring or an ongoing / interim evaluation =1** **existence of monitoring and ex-ante or ongoing / interim evaluation =2**
Cluster Support Instruments	assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support	**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**

Source: ECCP (2022)