



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

# Country factsheet

Netherlands

An initiative of the European Union





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## Introduction

This document presents an overview of the cluster policy in The Netherlands. Given its 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 The Netherlands.](#)

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. In the Netherlands, the national plan has not yet been drafted as the current caretaker government has left this task for the next Government which is still in the process of being formed since the elections of March 17<sup>th</sup> 2021.<sup>1</sup>

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<sup>1</sup> <https://www.tweedekamer.nl/kamerstukken/detail?id=2021D16246&did=2021D16246>

# 01

## Industrial ecosystems and cluster landscape



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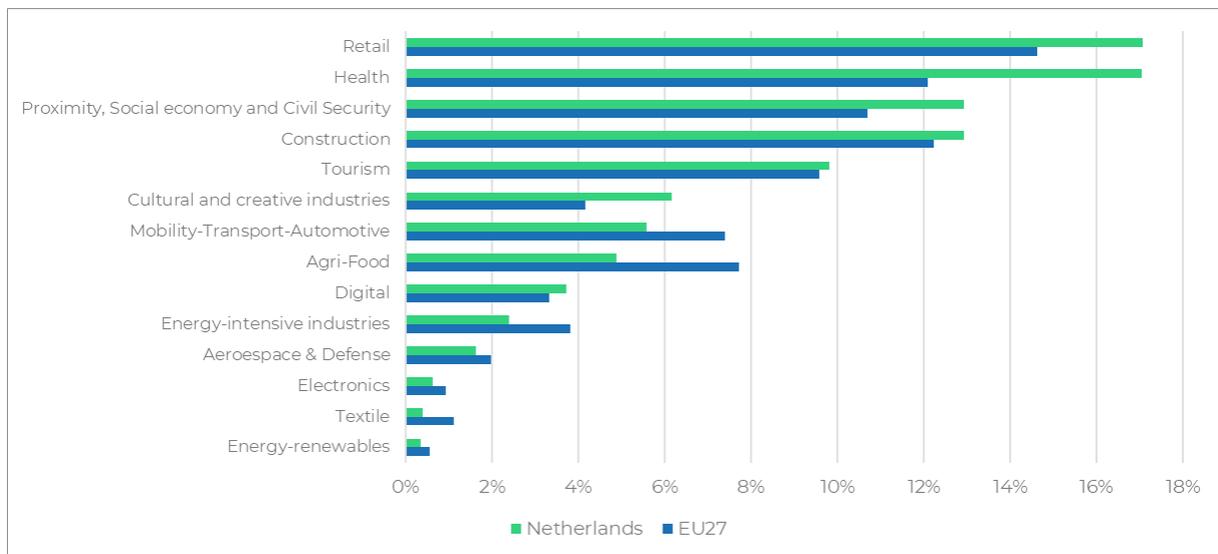


## 1. Industrial ecosystems and cluster landscape

### 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. The following graph shows the proportion of the country's employment accounted for by each ecosystem, as well as the equivalent figure for the EU27 on average. 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.

*Graph 1: Employment in the ecosystems*



Source: Own elaboration from Eurostat and National Statistical Offices

### Regionally relevant nodes

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. The following tables show the total number of regionally relevant specialisation nodes 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 75 in the country, while the second table is based on the 14 ecosystems, which total **10** in the country.



**Table 1: Regionally relevant sectoral nodes**

Region	Number of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
NL11: Groningen	6	N78 - Employment activities	C32 - Other manufacturing	Q87 - Residential care	R90 - Arts & entertainment	Q88 - Social work without accommodation
NL12: Friesland	4	N78 - Employment activities	C32 - Other manufacturing	Q87 - Residential care	Q88 - Social work without accommodation	
NL13: Drenthe	4	N78 - Employment activities	C32 - Other manufacturing	Q87 - Residential care	Q88 - Social work without accommodation	
NL21: Overijssel	4	N78 - Employment activities	Q87 - Residential care	C32 - Other manufacturing	Q88 - Social work without accommodation	
NL22: Gelderland	8	Q87 - Residential care	M72 - Scientific research & development	M73 - Advertising & market research	C32 - Other manufacturing	M74 - Other prof., scientific, techn. act.
NL23: Flevoland	4	N78 - Employment activities	Q87 - Residential care	G46-Wholesale trade (not motor vehicles)	M70 - Head offices, management consult.	
NL31: Utrecht	8	M74 - Other prof., scientific, techn. act.	M70 - Head offices, management consult.	R90 - Arts & entertainment	J62 - Computer programming, consultancy	M73 - Advertising & market research
NL32: North Holland	11	H51 - Air transport	N79 - Travel agency, tour operators	M73 - Advertising & market research	M74 - Other prof., scientific, techn. act.	R90 - Arts & entertainment
NL33: South Holland	9	M70 - Head offices, management consult.	M74 - Other prof., scientific, techn. act.	C32 - Other manufacturing	M73 - Advertising & market research	Q87 - Residential care
NL34: Zeeland	5	C32 - Other manufacturing	N78 - Employment activities	C20 - Manuf. of chemical products	Q87 - Residential care	I55 - Accommodation
NL41: North Brabant	9	C32 - Other manufacturing	M73 - Advertising & market research	M74 - Other prof., scientific, techn. act.	M70 - Head offices, management consult.	Q87 - Residential care
NL42: Limburg	3	N78 - Employment activities	C32 - Other manufacturing	Q87 - Residential care		

Source: Own elaboration from Eurostat and National Statistical Offices

**Table 2: Regionally relevant ecosystem nodes**

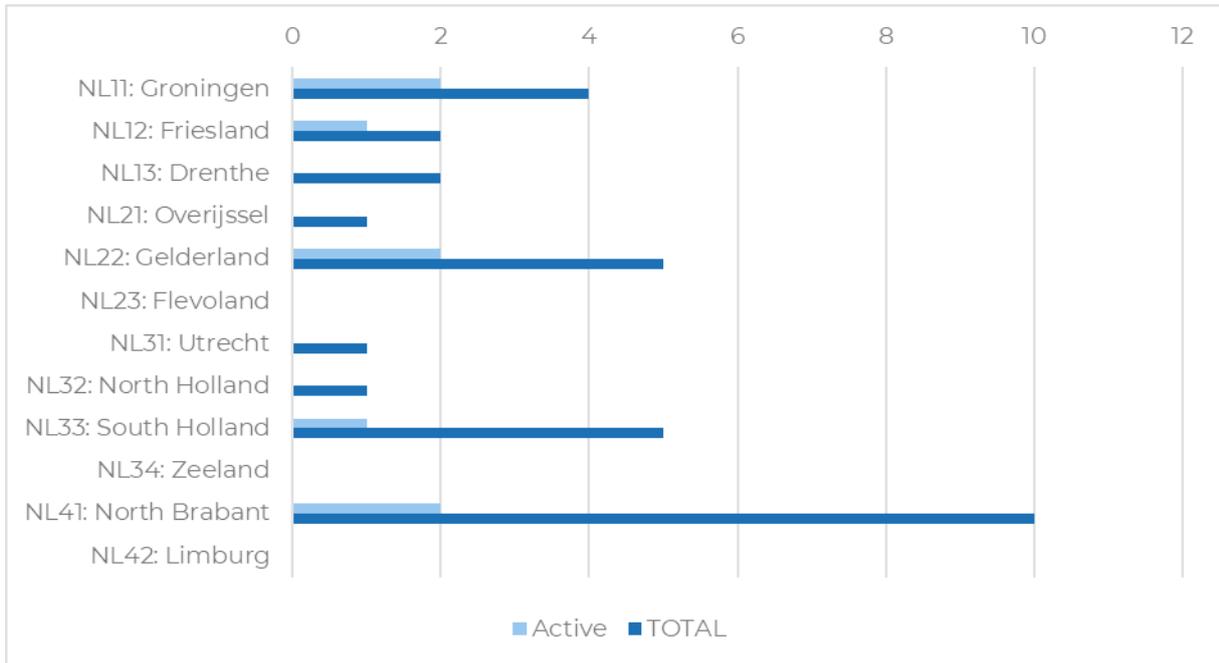
Region	Number of nodes	Node 1	Node 2
NL11: Groningen	1	Health	-
NL12: Friesland	1	Health	-
NL13: Drenthe	1	Health	-
NL21: Overijssel	1	Health	-
NL22: Gelderland	1	Health	-
NL23: Flevoland	0	-	-
NL31: Utrecht	2	Digital	Cultural and creative industries
NL32: North Holland	2	Cultural and creative industries	Digital
NL33: South Holland	0	-	-
NL34: Zeeland	0	-	-
NL41: North Brabant	0	-	-
NL42: Limburg	1	Health	-

Source: Own elaboration from Eurostat and National Statistical Offices

## Cluster organisations in the regions

There are 31 cluster organisations registered on the ECCP in the country, 8 of which can be considered active on the ECCP, having updated their profiles during the first half of 2021. The following graph shows the presence of cluster organisations in the different regions.

**Graph 2: Cluster organisations profiled and active on the ECCP**



Source: Own elaboration from Eurostat and National Statistical Offices

02

## National cluster policy, programmes and initiatives



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## 2. National cluster policy, programmes and initiatives

Policy type:	National cluster policy
Policy name:	Topsectorenbeleid
<b>POLICY OBJECTIVES</b> 	<p><b>Strengthening cooperation between companies or industry and RTDI actors</b></p> <p><b>Increasing competitiveness and boosting scale up of SMEs</b></p> <p><b>Fostering R&amp;D activities, technology development and implementation</b></p> <p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Supporting the consolidation of existing cluster organisations</b></p> <p><b>Promoting social and sustainable economy and other solidarity-based initiatives</b></p> <p>Since 2010, there is a cluster policy in the Netherlands focusing on 9 top sectors where the Netherlands excels in (agro-food, high tech, water, creative industries, chemicals, life sciences, energy, logistic, horticulture). The approach can be characterised as sectoral networking programmes as it focuses on networking among specific groups of companies and other actors and develops action agendas for specific sectors or technology domains. The clusters are in principle national in orientation, but some have a very strong regional concentration.</p>
<b>POLICY FOCUS</b> 	<p><b>Sectoral</b></p> <p>The focus of the policy lies on the 9 top sectors individually. However, on top of this, there are two transversal focuses: "Headquarters", which refers to ensuring the Netherlands as an attractive headquarters of internationally operating companies (1) and transversal themes that correspond to the so-called "Grand Challenges" of the seventh framework program and Horizon 2020 (2).</p>
<b>RESPONSIBLE AUTHORITIES</b> 	<p><b>In charge of drafting</b></p> <p><b>Provides funding</b></p> <p><b>Oversees the implementation</b></p> <p>The policy is initiated by the national Ministry of Economic Affairs and Climate, which also provides some forms of funding and monitors the implementation. However, business has been heavily consulted in the design of the policy and much of the actual implementation of the policy is left to them as well.</p>



Policy type:		National cluster policy
Policy name:		Topsectorenbeleid
<b>BENEFICIARIES</b> 		<p><b>SMEs</b></p> <p><b>Research organisations</b></p> <p><b>Academic institutions</b></p> <p><b>Start-ups</b></p> <p><b>Large firms</b></p> <p><b>General population</b></p> <p><b>Policy makers</b></p> <p><b>Other educational institutions</b></p> <p><b>Regional government</b></p> <p>The principle of the policy is that a triple helix (or golden triangle) of partners coming from government, business and knowledge institutions is forming the core of the stakeholders involved, while several other actors benefit from the policy as well.</p>
<b>INSTRUMENTS</b> 	Financial	<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 to hire personnel</b></p> <p><b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b></p>
	Technical assistance	-
	Explanation	The policy only includes financial instruments, mostly related to taxation and subsidising initiatives designed by the businesses themselves. There is no non-financial/technical support available.



Policy type:		National cluster policy
Policy name:		Topsectorenbeleid
<b>HISTORY</b> 	<b>Period</b>	<b>Unlimited period</b>
	<b>Ending year</b> ( <i>for policies with limited period</i> )	-
	<b>Starting year</b>	2010
	<b>Explanation</b>	The policy has been in place since 2010; there is no official end date, but the policy is continuously being developed and evolving.
<b>BUDGET</b> 	<b>Overall</b>	EUR 12,069 million (2016-2021)
	<b>Annual</b>	+/- EUR 2 million
	<b>Source of funding</b>	National budget (several sources)
<b>POLICY EVALUATION</b> 	<b>Availability</b>	<b>in-itinere</b>
	<b>Results</b>	The most important evaluation of the policy is done by the Advisory Council for Science, Technology and Innovation (AWTI) which is publishing a yearly report to evaluate the policy. As its still ongoing, no ex-post evaluation has taken place. Before each new policy proposal, ex-ante evaluations are performed.
<b>POLICY ALIGNMENT WITH THE EU PRIORITIES</b> 		<b>Digitalisation</b>

# 03

## State of play of cluster policy





### 3. State of play of cluster policy

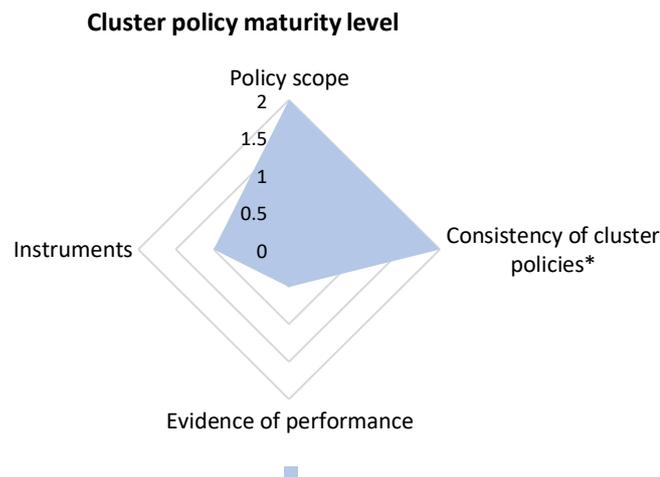
The data below illustrates how the country ranks in terms of maturity of cluster policy. The maturity index is based on a combination of factors presented in Chapter 2 and which are scored based on their existence:

- **Policy scope:** whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies (existence of broader policies = 1 point; existence of targeted cluster policies = 2 points)
- **Consistency of cluster policies:** assessment of the duration and experience of the country in doing cluster policies. This dimension assesses only existing cluster policies and not broader policies (no cluster policies available = 0 points; < 10 years of experience or > 10 years (but interrupted) = 1 point; > 10 years (but with clear continuity = 2 points)
- **Evidence of performance:** the existence of monitoring and evaluation mechanisms determines the degree of policy development in the country (no evaluations = 0 points; existence of evaluations of past policies or in-itinere = 0.5 points; existence of ex-ante and/or ex-post evaluations = 0.5 points)
- **Instruments:** whether the policies provide any instruments to support the policy implementation, being these financial and/or technical assistance (1 point for each type of instrument available)

It is important to note that the maturity does not reflect the performance of a country, but only the degree of development of their cluster policy at the moment when the data was collected (2020 and 2021). The maturity index illustrates how the country scores for each of these four dimensions (policy scope, consistency of cluster policies, evidence of performance and instruments) compared to the maximum score that they can reach.

	Netherlands	Maximum score
Policy scope	2	2
Consistency of cluster policies*	2	2
Evidence of performance	0,5	1
Instruments	1	2

\* This dimension is scored solely if the country has a dedicated cluster policy and it assesses only cluster policies



#### State of play of cluster policy in the country

##### Policy evaluation (for terminated policies)

##### Availability of evaluations for terminated policies

The most important evaluation of the policy is done by the Advisory Council for Science, Technology and Innovation (AWTI) which is publishing a periodically recurring report to evaluate the policy. The latest one was



	<p>published in 2016, the main recommendations are to show more flexibility, to have a more differentiated approach and to make clearer choices. The government itself is also monitoring the implementation, focusing on input (i.e. budget), output (i.e. development of private R&amp;D expenditure), second order effects (innovative products and related turnover) and third order effects (i.e. employment and economic development). Because most of these effects are only visible after a few years, the Ministry of Economic Affairs focuses on a broad monitoring of the progress of its business policy and in a communication strategy that focuses on entrepreneurs, directors, MPs, researchers and other interested parties. Every year, in September, a progress report on the Top Sectors policy is presented to Parliament. This consists of a letter to the House of Representatives on the progress of the business policy including the top sectors and a Business Policy Monitor of the Central Bureau for the Statistics (CBS), which outlines the most important facts and figures and an (economic) interpretation where possible.</p>
<b>Policy approach in the country</b>	<p><b>Policy support for the activities of cluster organisations</b></p> <p><b>Broad-based framework policies to support cooperation effectiveness</b></p>
<b>Continuity</b>	<p>At least since 2004, the Netherlands has had a cluster policy which has been gradually developed and expanded. In the first six years, five sectors were covered (agro-food, high tech, water, creative industries, chemicals). Since 2010, four additional sectors (life sciences, energy, logistic, horticulture) were added. There has thus been a certain continuity since the start of the policy.</p> <p>Going forward, there is already a policy in place for the period 2020-2023 in the form of a Knowledge and Innovation Covenant made by the three partners with a committed budget of approximately EUR 4.9 billion, of which EUR 2.05 billion from private and EUR 2.85 billion from public funds. The focus of this Covenant lies on mission-based funding around four core themes (energy transition and sustainability; agriculture, water and food, health and care; and safety).</p>
<b>Consistency</b>	<p><b>&gt; 10 years (but with clear continuity)</b></p> <p>There has been a policy in place since, at least 2004, and a clear continuation can be seen going to the present day and into the future, at least until 2023.</p>

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