



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Finland

An initiative of the European Union





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Introduction



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

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.

Despite the somewhat limited shock that the COVID-19 pandemic had on the Finnish economy, the country has taken multiple measures to deter the impacts. These are set under [the Sustainable Growth Programme](#), drafted by the Finnish government, which utilises the Recovery and Resilience Facility funding and is structured around four pillars of green transition, digitalisation and data economy, employment and skills, and social and health services. The clusters have been included in the programme, especially in terms of innovation, research and skills. The drafting of the programme included several stakeholder hearings and consultations that also included organisations from the industrial clusters. [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 [Finnish National recovery and resilience plan](#), clusters are explicitly mentioned:

- as a potential contributor to the green transition (i.e. as innovation clusters),
- the creation of competence clusters by cooperation among RDI actors in order to support sustainable growth and digitalisation,
- improving quality, effectiveness and productivity of health and social services through expertise cluster,
- the support of water (services) cluster, amongst others the Water Cluster Finland.

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 [Partnership Agreement 2021-2027](#) (for the ERDF, ESF, JTF, EMFF, BMVI) in Finland does not make a direct reference to clusters. However, innovative ecosystems are addressed in order to lead to a smarter economy and sustainable urban development. The largest share of the partnership agreement will be directed at improving skills and innovation.

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

- 1) an overview of the industrial ecosystems and cluster landscape in Finland
- 2) an overview of the national policies that support cluster development,
- 3) an assessment of the state of play of the national cluster policy.

01

Industrial ecosystems and cluster landscape



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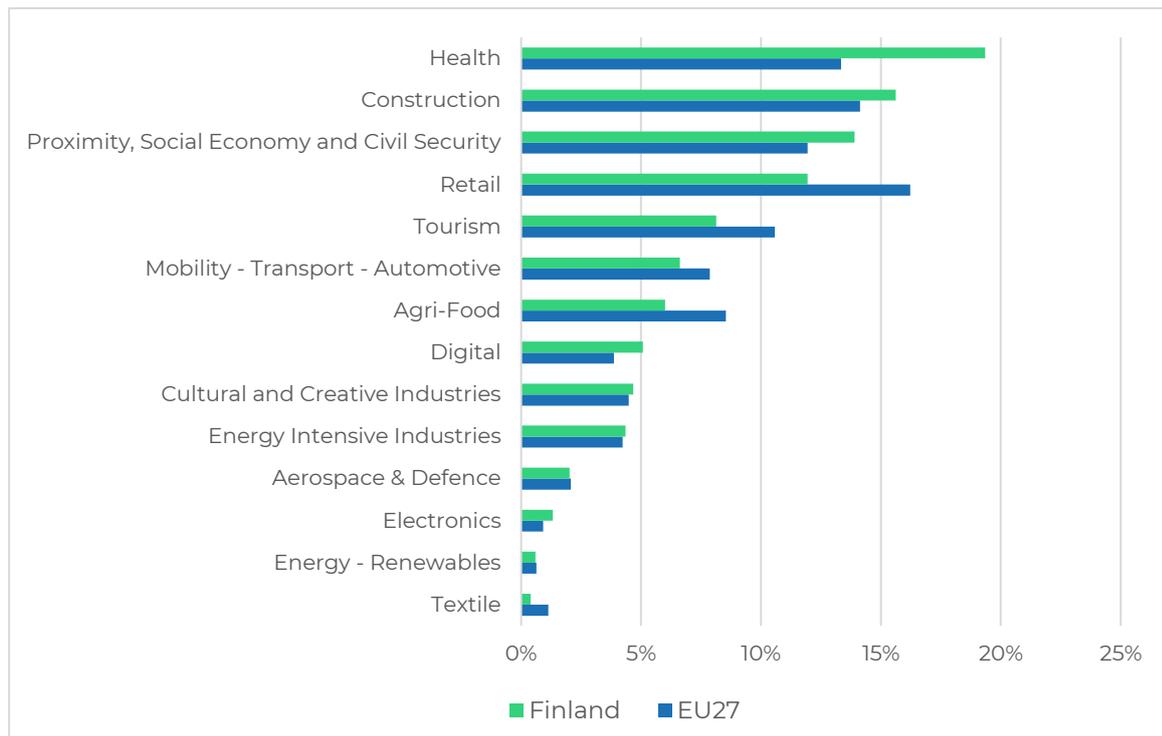
1. Industrial ecosystems and cluster landscape

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.¹ The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2-digit activities, following the methodology established in the European Commission.²

In Figure 1, the employment share of Finland and 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. Here, the three main ecosystems by employment for Finland are “Health”, “Construction” and “Proximity, Social Economy and Civil Security”. In these industrial ecosystems as well as in “Digital” Finland has employment shares higher than the EU27 average. This indicates the relative strength of Finland in these industrial ecosystems.

Figure 1: Employment in the ecosystems



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

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

² 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.³ 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 42 in the country, while the second table is based on the 14 ecosystems, which total 5 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
FI19: West Finland	8	A02 - Forestry & logging	C17 - Manuf. of paper products	C28 - Manuf. of machinery & equipment	Q88 - Social work without accommodation	Q87 - Residential care
FI1B: Helsinki-Uusimaa	12	J58 - Publishing activities	J62 - Computer programming, consultancy	N78 - Employment activities	C26 - Manuf. of electronic & optical products	F41 - Construction of buildings
FI1C: South Finland	6	C17 - Manuf. of paper products	Q88 - Social work without accommodation	C16 - Manuf. of wood products	Q87 - Residential care	F41 - Construction of buildings
FI1D: North and East Finland	8	A02 - Forestry & logging	C16 - Manuf. of wood products	P85 - Education	C24 - Manuf. of basic metals	C26 - Manuf. of electronic & optical products
FI20: Åland Islands	8	H50 - Water transport	H51 - Air Transport	H53 - Postal & courier activities	Q88 - Social work without accommodation	F41 - Construction of buildings

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

Overall, there are fewer ecosystem nodes than 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. The overall employment strength of Finland in the industrial ecosystems “Health”, “Construction”, “Proximity, Social Economy and Civil Security” as well as “Digital” are reflected in the regionally relevant sectoral nodes and regionally relevant ecosystem nodes of the different regions.

For instance, almost all Finnish regions have regionally relevant sectoral nodes in sectors such as social work (Q88) or residential care (Q87). Moreover, the regions South Finland (FI1C) and North and East Finland (FI1D) have regionally relevant ecosystem nodes in “Health”. In addition, the majority of Finnish regions have regionally relevant sectoral nodes in the construction of buildings (F41). For the capital region of Helsinki-Uusimaa, relevant sectoral nodes such as computer programming (J62) or manufacturing of electronic and optical products (C26) emerge, which is well reflected in the region's regionally relevant ecosystem nodes (“Digital” and “Electronics”).

³ 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).



Table 2: Regionally relevant ecosystem nodes

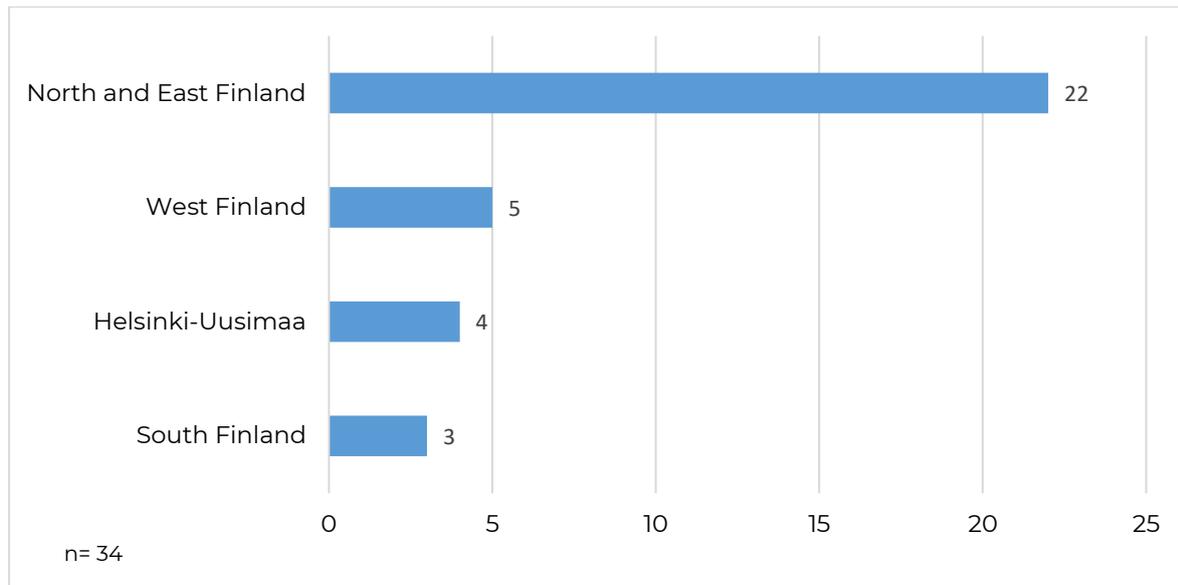
Region	Number of ecosystemnodes	Node 1	Node 2
FI19: West Finland	0	-	-
FI1B: Helsinki-Uusimaa	2	Digital	Electronics
FI1C: South Finland	1	Health	-
FI1D: North and East Finland	2	Electronics	Health
FI20: Åland Islands	0	-	-

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

Cluster organisations in the regions

There are 34 cluster organisations registered on the ECCP in the country, 22 of which are located in North and East Finland. Five cluster organisations are based in West Finland followed by four cluster organisations in Helsinki-Uusimaa and three in South Finland. The following figure shows the presence of cluster organisations with a profile on the ECCP 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 (10%, EU:7%) constitute the majority of member organisations of Finnish cluster organisations with profiles on the ECCP. From a thematic perspective, these Finnish 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 (4 cluster organisations)
- Agri-food (4 cluster organisations)
- Renewable Energy (3 cluster organisations)
- Aerospace & Defence (2 cluster organisations)



- Health (2 cluster organisations)
- Mobility-Transport-Automotive (1 cluster organisation)
- Creative & Cultural Industries (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 Finnish policies relevant for clusters on a national level.

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 a Finnish national cluster-related policy.

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 policies in Finland.

Policy type:	Broad policy	Broad policy
Policy name:	The regional development decision 2020–2023. Sustainable and vital regions	(Updated) National Roadmap for Research, Development and Innovation
<p>POLICY OBJECTIVES</p> 	<p>Strengthening cooperation between companies or industry and RTDI actors</p> <p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Supporting internationalisation activities</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Promoting entrepreneurship, start-ups and spin-offs</p> <p>Promoting resilience and sustainable economy and other solidarity-based initiatives</p> <p>Promoting employment and upgrading skills and competences</p>	<p>Strengthening cooperation between companies or industry and RTDI actors</p> <p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Supporting internationalisation activities</p> <p>Enhancing the visibility of clusters</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Supporting the creation of new cluster organisations</p> <p>Promoting resilience and sustainable economy and other solidarity-based initiatives</p>



Policy type:	Broad policy	Broad policy
Policy name:	The regional development decision 2020–2023. Sustainable and vital regions	(Updated) National Roadmap for Research, Development and Innovation
	<p>Enhancing territorial cohesion (through RIS3)</p> <p>Strengthening the network of cluster organisations/cross-clustering</p> <p>Increase supply chain resilience</p>	<p>Promoting employment and upgrading skills and competences</p> <p>Strengthening the network of cluster organisations/cross-clustering</p> <p>Cluster analysis and support for policymaking</p>
	<p>The national priorities of regional development for 2020–2023 set the national level policy for regional development. It is decided by the government and will set the larger framework for the aims and focus points for regional development. It includes the national and regional aspects, which are then implemented regionally by the local authorities in the regional development strategy.</p>	<p>The national roadmap for RDI, developed in 2020 and updated at the end of 2021, outlines several measures directed at enhancing the Finnish RDI environment. In Finland, the term "ecosystems" is more frequently used than clusters. The roadmap is an important pillar for the development of innovation ecosystems in Finland.</p>
<p>POLICY FOCUS</p> 	<p>Cross-sectoral</p> <p>The priorities highlight the need for cross-sectoral collaboration between the clusters. There is no specific information provided on the focus of clusters. Typically, the clusters are seen as network organisations with thematic focus.</p>	<p>Cross-sectoral</p> <p>The strategy addresses RDI activities in several sectors. Not only the private sector but also the public sector is covered. The education sector is an important pillar. Businesses R&D activities are addressed independent from the sector.</p>
<p>RESPONSIBLE AUTHORITIES</p> 	<p>In charge of drafting</p> <p>Provides funding</p> <p>Oversees the implementation</p>	<p>In charge of drafting</p> <p>In charge of implementation</p> <p>Provides funding</p> <p>Oversees the implementation</p>



Policy type:	Broad policy	Broad policy
Policy name:	The regional development decision 2020–2023. Sustainable and vital regions	(Updated) National Roadmap for Research, Development and Innovation
	The Ministry of Economic Affairs and Employment will coordinate the regional development, which will use both specific sectoral and areal focused national funding and EU funds.	The Ministry of Education and Culture is the responsible authority behind the roadmap. The roadmap was adopted by the Finnish government in 2020 and updated in 2021.
BENEFICIARIES 	SMEs Cluster organisations Research organisations Academic institutions Start-ups Business associations Large firms NGOs Technology centres General population	SMEs Cluster organisations Research organisations Academic institutions Large firms NGOs Technology centres General population Policy makers
	The programme is a holistic entrepreneurship strategy that considers different enterprises from microenterprises to large multinationals. It is supported by active participation of other stakeholders, including civil society organisations, public administration, church etc.	The roadmap addresses a variety of actors that all can benefit from the implementation of the strategy. All institutions related to research are central part of the roadmap's objectives but also businesses, including cluster organisations (in the Finnish sense addressed by ecosystems development) profit from achieving the roadmap's objective.



Policy type:		Broad policy	Broad policy
Policy name:		The regional development decision 2020–2023. Sustainable and vital regions	(Updated) National Roadmap for Research, Development and Innovation
INSTRUMENTS 	Financial	Funding collaboration initiatives Innovation: voucher, support to hire PhDs, cooperation with R&I actors	Funding collaboration initiatives Support to R&D projects, SMEs becoming cluster members, etc. Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects) Innovation: voucher, support to hire PhDs, cooperation with R&I actors
	Technical assistance	-	Support for hard skill development: knowledge transfer, intellectual property , entrepreneurship, export advice, market intelligence Support for soft skills development: coaching, management training, upskilling/reskilling Support for networking and partnership building (at national and/or international level)
	Explanation	<p>The strategy uses following national financial instruments to support regional development: entrepreneurship funds, employment funds, R&D focused funds, different investment and development funds that are divided in sectors, and EU funding (structural funds, the Just Transition Fund, the European Agricultural Fund for Rural Development (EAFRD), and the LIFE programme, and the Framework Programme for Research as a source of competitive funding). The use of these instruments is not described in detail on strategy level.</p>	<p>The roadmap outlines different measures (in total 36) that are divided into the main pillars of the plan: Competence, new partnership models, innovative public sector. These measures show which activities especially the Ministry of Culture and Education will perform to achieve the goals of the strategy.</p>



Policy type:		Broad policy	Broad policy
Policy name:		The regional development decision 2020–2023. Sustainable and vital regions	(Updated) National Roadmap for Research, Development and Innovation
HISTORY 	Period	Limited period	Limited period
	Ending year <i>(for policies with limited period)</i>	2023	2030
	Starting year	2020	2020 (updated in 2021)
	Explanation	The strategy is renewed every four years. The previous strategy was set for years 2016 to 2019.	The roadmap was adopted in 2020 and its objectives are directed at the year 2030.
BUDGET 	Overall	The policy does not have separate budget as it is executed as part of the overall states funding framework.	The roadmap does not specify a dedicated budget. The measures presented will be mainly executed by the responsible ministry.
	Annual	-	-
	Source of funding	The Government of Finland, EU funds. The strategy uses following national financial instruments to support regional development: entrepreneurship funds, employment funds, R&D focused funds, different investment and development funds that are divided in sectors, and EU funding.	There is no main source of funding. The different measures are not always connected to a certain kind of funding but rather depict which steps are necessary to achieve the objectives. Different actors are addressed (e.g. R&D businesses, higher education institutions, Academy of Finland, Business Finland etc.)



Policy type:		Broad policy	Broad policy
Policy name:		The regional development decision 2020–2023. Sustainable and vital regions	(Updated) National Roadmap for Research, Development and Innovation
<p>POLICY</p>  <p>EVALUATION</p>	Availability	ex-ante	in-itinere
	Results	The legal requirements are set to provide an impact assessment and evaluation of the public programs. The programme memo also has a preliminary evaluation of the impacts. The programme is divided in six different areas: environmental, community development, innovation and R&D, skills and education, participation and welfare, and regional development. Each of these is evaluated in terms of the economic, social and environmental impacts. Overall, the programme areas are estimated to have positive impacts in all areas, except participation and welfare approach which is neutral in other than in social aspect. There is a lack of overarching ex-post evaluation.	The roadmap and its measures will be monitored regularly with a set of different indicators. The indicators are available on the website of the Ministry of Education and Culture and the progress towards the objectives can be followed online.
<p>POLICY ALIGNMENT WITH THE EU PRIORITIES</p> 		<p>Green economy</p> <p>Digitalisation</p> <p>Resilience</p>	<p>Green economy</p> <p>Digitalisation</p>

Source: ECCP (2022).

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 Finnish 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 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 Finland** for 2022. The total score of Finland is 2 points out of 8.

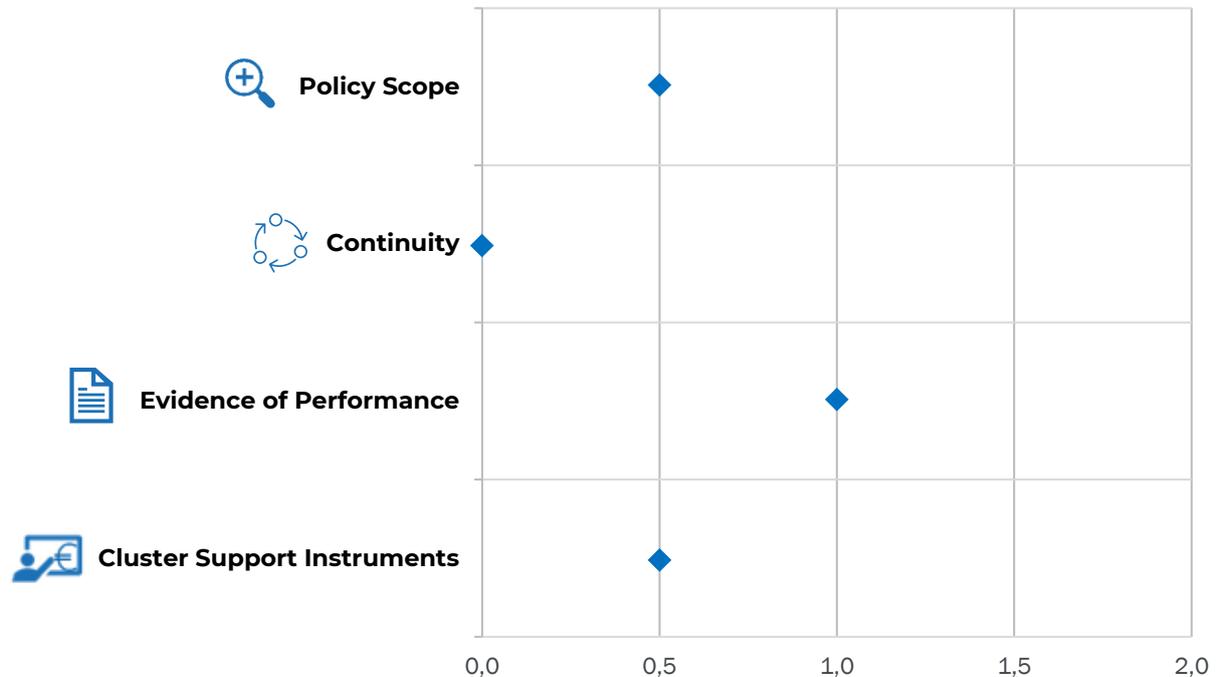
Finland	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	0,5
	Sectoral policy	1	
	National and/or regional cluster policy	2	
CONTINUITY	No cluster-specific policy available	0	0
	Cluster policy established recently	0,5	
	Cluster policy established between over 2 and 10 years	1	
	Cluster policy established over 10 years ago	2	
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	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	
TOTAL (8)			2

Source: ECCP (2022).



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

Figure 3: Maturity of cluster policy - Finland



Source: ECCP (2022)

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

Policy scope

In Finland, the broad policy sets out the priorities for regional development. There is no specific sector focus and clusters are not a central part of the strategy. The focus lies on strengthening cooperation. The approach laid down in the strategy is meant to be implemented by national/regional development agencies. The RDI roadmap however, addresses innovation ecosystems which is the term more frequently used than clusters in Finland.

Continuity

Programme based regional development policy in Finland dates back to 1989. The current structure has been laid in 2008 when the Finnish ministry of Economy was reformed (official: Ministry of Economic Affairs and Employment). The law on regional development was set in 2014 (356/2014).

In Finland, the term "cluster" is not as frequently used as in other European countries. Instead, "innovation ecosystem" is the term that is more relevant to Finnish policy making. Ecosystems are



understood as interactions between various actors, constituting a structure and an interactive process at the same time.⁴

At the moment, there is no dedicated cluster policy available at national level. The broad policy incorporates cluster development as a part of the priority on business life and R&D&I support. The roadmap on RDI foresees strengthened ecosystem development. As a part of that, ecosystems agreements with selected cities have been signed in 2021 that foresee to build innovation ecosystems.

Evidence of performance

Evaluation of 2016-2018 areal innovation and pilots is available. On overall specific policy areas of the programme have been successful on providing individual funding and guiding the local clusters to the targets of the national strategy. The only notable concerns raised have been regarding the long-term continuity of the strategy, although this was evaluated in 2018 before the total impact of the previous programme was fully explored.

The implementation of the RDI roadmap is regularly monitored with a set of indicators, accessible online.

Cluster support instrument

The broader policy sets out that in order to strengthen cluster development, actors from research and business need to stronger cooperate. A dedicated support instrument is not developed. Also, in the RDI roadmap, different measures that impact ecosystem development are outlined. Again, a dedicated support instrument is not developed.

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. Finnish cluster organizations have been involved in seven consortia of the European Strategic Cluster Partnerships, out of which four partnerships were focusing on internationalisation (ESCP-4i) and three partnerships were on cluster management excellence (ESCP-4x). Consortia partners came from 12 different EU member states (AT, CZ, DE, EE, ES, FR, IT, LT, NL, PL, PT, SE). Four Finnish cluster organizations participated in the INNOSUP-1 initiative with partner organisations coming from 18 countries (BG, CH, DE, EE, ES, HU, FR, GR, IE, IT, LT, PL, PT, RO, TR, UK, SE, SI).

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 Finland, three clusters are part of three Euroclusters with partners from nine countries (IT, DE, ES, PL, NL, FR, CZ, SE, PT). These Euroclusters are AIBC Eurocluster, CirInWater and PIMAP4SUSTAINABILITY. Collectively they cover six industrial ecosystems: "Mobility – Transport – Automotive" and "Digital" (AIBC Eurocluster), "Renewable Energy" and "Agri-Food" (CirInWater) and "Energy Intensive Industries" and "Health" (PIMAP4SUSTAINABILITY).

⁴ For more information see:

https://publications.vtt.fi/julkaisut/muut/2021/Collaborating_for_a_Sustainable_Future.pdf (last accessed 26.01.2023).

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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	<p>absence of cluster policy = 0</p> <p>existence of broader policies = 0,5</p> <p>existence of specific sectoral policies = 1</p> <p>existence of targeted cluster policies = 2</p>
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	<p>absence of policies supporting cluster development = 0</p> <p>cluster policy established recently (within the last 2 years) = 0,5</p> <p>cluster policy established between over 2 and 10 years = 1</p> <p>cluster policy established over 10 years ago = 2</p>
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	<p>no evaluation and / or monitoring available = 0</p> <p>existence of evaluations of past policies, e.g. ex-ante = 0,5</p> <p>existence of monitoring or an ongoing / interim evaluation =1</p> <p>existence of monitoring and ex-ante or ongoing / interim evaluation =2</p>
Cluster Support Instruments	assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support	<p>no instruments for cluster development =0</p> <p>financial support for cluster development in the broader and / or sectoral policy = 0,5</p> <p>financial or technical support for cluster development in dedicated cluster policy = 1</p> <p>financial and technical support for cluster development in dedicated cluster policy = 2</p>

Source: ECCP (2022)