



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

# Country factsheet

Italy

An initiative of the European Union





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## Introduction



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

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.

As a consequence of the COVID-19 pandemic, European as well as global economies have been subject to severe output losses. In response, policymakers at EU and national level have acted decisively and made very significant financial resources available to tackle the threat of a prolonged downturn. This was carried out through the Recovery and Resilience Facility, [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 Italian clusters are mentioned as a key tool for the successful and quick implementation of innovation projects. They can help in properly allocating the funds for economic value creation as well as manage funding schemes for SMEs.

The National recovery and resilience plan (PNRR), explicitly mentions six cluster areas within the national research plan (PNR) and research plan for relevant national interest (PRIN). These are categorized in the following areas: health; humanistic culture, creativity, social transformation, an inclusive society; security for social systems; digital, industry, aerospace; climate, energy, sustainable mobility; food, bioeconomy, natural resources, agriculture, environment. The cluster development aims to strengthen the research tools and guarantee the implementation of research projects within the strategic guidelines of the National recovery and resilience plan (PNRR). 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 [ERDF Partnership Agreement 2021-2027](#) in Italy makes no clear reference to clusters. However, it does consider the PNRR and consequently the cluster mentioned within.

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

- 1) an overview of the industrial ecosystems and cluster landscape in Italy
- 2) an overview of the national cluster policy and an insight into a 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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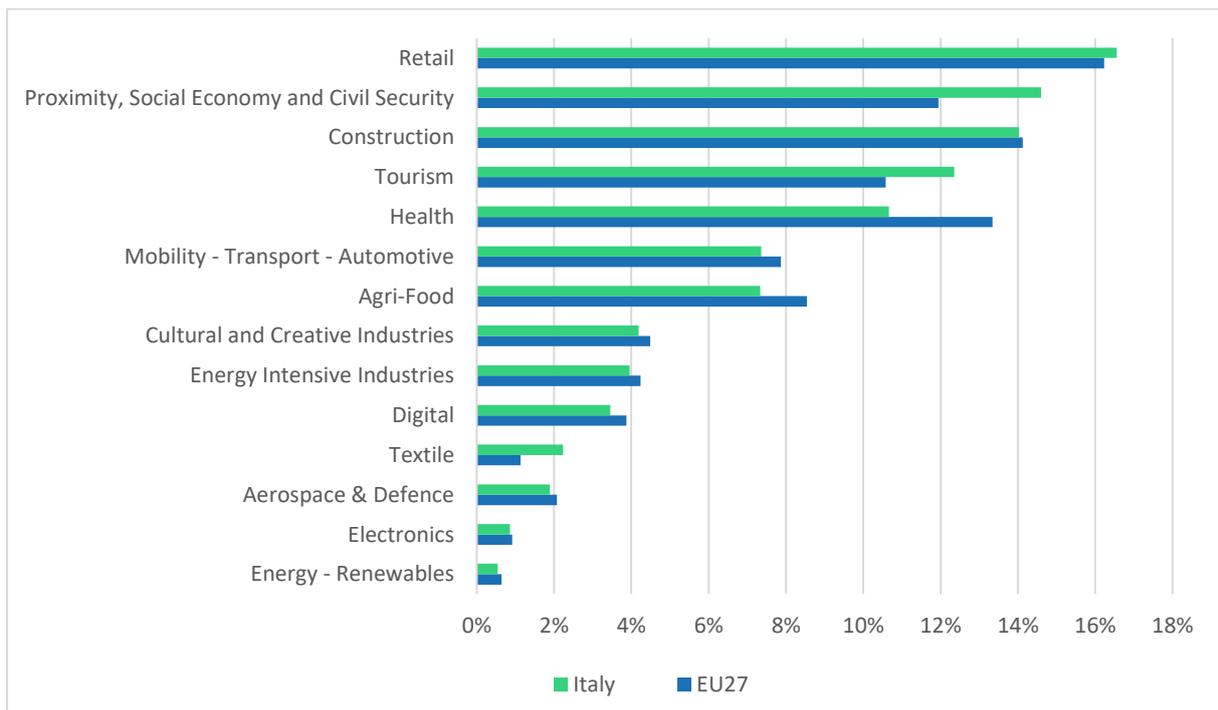
# 1. Industrial ecosystems and cluster landscape

## 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 Italy 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 that of the EU27, it indicates that the country is more specialised in that ecosystem. Here, the three main ecosystems by employment for Italy are “Retail”, “Proximity, Social Economy, and Civil Security” and “Construction”. Moreover, Italy has a higher employment share in the ecosystems “Tourism” and “Textile” compared to the EU27 average.

**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> (accessed 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 show 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 88 in the country, while the second table is based on the 14 ecosystems, which total 20 in the country.

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. For almost all Italian regions, the sector “Activities of households as employers of domestic personnel” (T97) and “Other personal services” (S96)<sup>4</sup> are among most relevant sectoral nodes (NACE). These sectors, among others, are reflected in the industrial ecosystem “Proximity, Social economy and Civil security”, which makes up second-most of the total employment in the country, at a higher share than at the EU27 level (See Figure 1). Two regions have a regionally relevant node in this ecosystem, namely Sardinia (ITG2) and Lazio (IT14). Regions, particularly those in the Northeast and Northwest regions of Italy, exhibit regionally relevant sectoral nodes in the manufacturing of wearing apparel (C14) as well as nodes in the ecosystem “Textile”. The specialisation in this industrial ecosystem can also be traced back to the fact that the share of the Textile ecosystem at the country level is higher – about double – compared to the share at the EU27 level, as shown by Figure 1.

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<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> (accessed 09.01.2023).

<sup>4</sup> This category includes, among other things, washing and cleaning of textiles, hairdressing and other beauty treatment, funeral and related activities, physical well-being activities like saunas and steam baths, massage salons, or fitness clubs, as well as several other personal service activities.



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

Region	# of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
<b>ITC1: Piedmont</b>	7	T97 - Households as employers act.	C14 - Manuf. of wearing apparel	M74 - Other prof., scientific, techn. act.	C25 - Manuf. of fabricated metal products	C28 - Manuf. of machinery & equipment
<b>ITC2: Valle d'Aosta</b>	5	I56 - Food & beverage services	T97 - Households as employers act.	I55 - Accommodation	D35 - Electricity, gas, steam and air conditioning supply	S96 - Other personal services
<b>ITC3: Liguria</b>	7	T97 - Households as employers act.	H52-Warehousing & support for transportation	S96 - Other personal services	H49 - Land transport and transport via pipelines	H53 - Postal and courier activities
<b>ITC4: Lombardy</b>	7	T97 - Households as employers act.	C14 - Manuf. of wearing apparel	M74 - Other prof., scientific, techn. act.	M69 - Legal & accounting	S96 - Other personal services
<b>ITF1: Abruzzo</b>	2	T97 - Households as employers act.	S96 - Other personal services	-	-	-
<b>ITF2: Molise</b>	2	T97 - Households as employers act.	A01 - Crop and animal production, hunting and related service activities	-	-	-
<b>ITF3: Campania</b>	2	T97 - Households as employers act.	S96 - Other personal services	-	-	-
<b>ITF4: Apulia</b>	2	T97 - Households as employers act.	A01 - Crop & animal production	-	-	-
<b>ITF5: Basilicata</b>	3	E38 - Waste activities	T97 - Households as employers act.	A01 - Crop & animal production	-	-
<b>ITF6: Calabria</b>	3	T97 - Households as employers act.	A01 - Crop & animal production	S96 - Other personal services	-	-
<b>ITG1: Sicily</b>	4	T97 - Households as employers act.	E38 - Waste activities	S96 - Other personal services	A01 - Crop & animal production	-
<b>ITG2: Sardinia</b>	4	T97 - Households as employers act.	S96 - Other personal services	I56 - Food and beverage service activities	S94 - Membership organisations	-
<b>ITH1: Autonomous Province of Bolzano</b>	3	I56 - Food and beverage service activities	T97 - Households as employers act.	I55 - Accommodation	-	-
<b>ITH2: Autonomous Province of Trento</b>	3	T97 - Households as employers act.	I56 - Food and beverage service activities	I55 - Accommodation	-	-
<b>ITH3: Veneto</b>	4	C14 - Manuf. of wearing apparel	T97 - Households as employers act.	C25 - Manuf. of fabricated metal products	C28 - Manuf. of machinery and equipment	-
<b>ITH4: Friuli-Venezia Giulia</b>	5	T97 - Households as employers act.	C14 - Manuf. of wearing apparel	C25 - Manuf. of fabricated metal products	C28 - Manuf. of machinery and equipment	S96 - Other personal services
<b>ITH5: Emilia-Romagna</b>	4	T97 - Households as employers act.	C14 - Manuf. of wearing apparel	C25 - Manuf. of fabricated metal products	C28 - Manuf. of machinery and equipment	-
<b>ITII: Tuscany</b>	6	T97 - Households as employers act.	S96 - Other personal services	M74 - Other prof., scientific, techn. act.	I56 - Food and beverage service activities	C25 - Manuf. of fabricated metal products
<b>ITII2: Umbria</b>	2	T97 - Households as employers act.	S96 - Other personal services	-	-	-
<b>ITII3: Marche</b>	5	C14 - Manuf. of wearing apparel	T97 - Households as employers act.	C25 - Manuf. of fabricated metal products	C28 - Manuf. of machinery and equipment	S96 - Other personal services
<b>ITII4: Lazio</b>	8	T97 - Households as employers act.	J63 - Information service activities	S96 - Other personal services	M74 - Other prof., scientific, techn. act.	N82 - Business support activities

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



**Table 2: Regionally relevant ecosystem nodes**

Region	Number of nodes	Node 1	Node 2
<b>ITC1: Piedmont</b>	1	Textile	-
<b>ITC2: Valle d'Aosta</b>	1	Tourism	-
<b>ITC3: Liguria</b>	0	-	-
<b>ITC4: Lombardy</b>	1	Textile	-
<b>ITF1: Abruzzo</b>	1	Textile	-
<b>ITF2: Molise</b>	1	Textile	-
<b>ITF3: Campania</b>	0	-	-
<b>ITF4: Apulia</b>	0	-	-
<b>ITF5: Basilicata</b>	2	Textile	Agri-Food
<b>ITF6: Calabria</b>	1	Agri-Food	-
<b>ITG1: Sicily</b>	0	-	-
<b>ITG2: Sardinia</b>	1	Proximity, Social economy and Civil Security	-
<b>ITH1: Autonomous Province of Bolzano</b>	2	Tourism	Textile
<b>ITH2: Autonomous Province of Trento</b>	1	Textile	-
<b>ITH3: Veneto</b>	1	Textile	-
<b>ITH4: Friuli-Venezia Giulia</b>	1	Textile	-
<b>ITH5: Emilia-Romagna</b>	1	Textile	-
<b>ITI1: Tuscany</b>	1	Textile	-
<b>ITI2: Umbria</b>	1	Textile	-
<b>ITI3: Marche</b>	1	Textile	-
<b>ITI4: Lazio</b>	2	Proximity, Social Economy and Civil Security	Digital

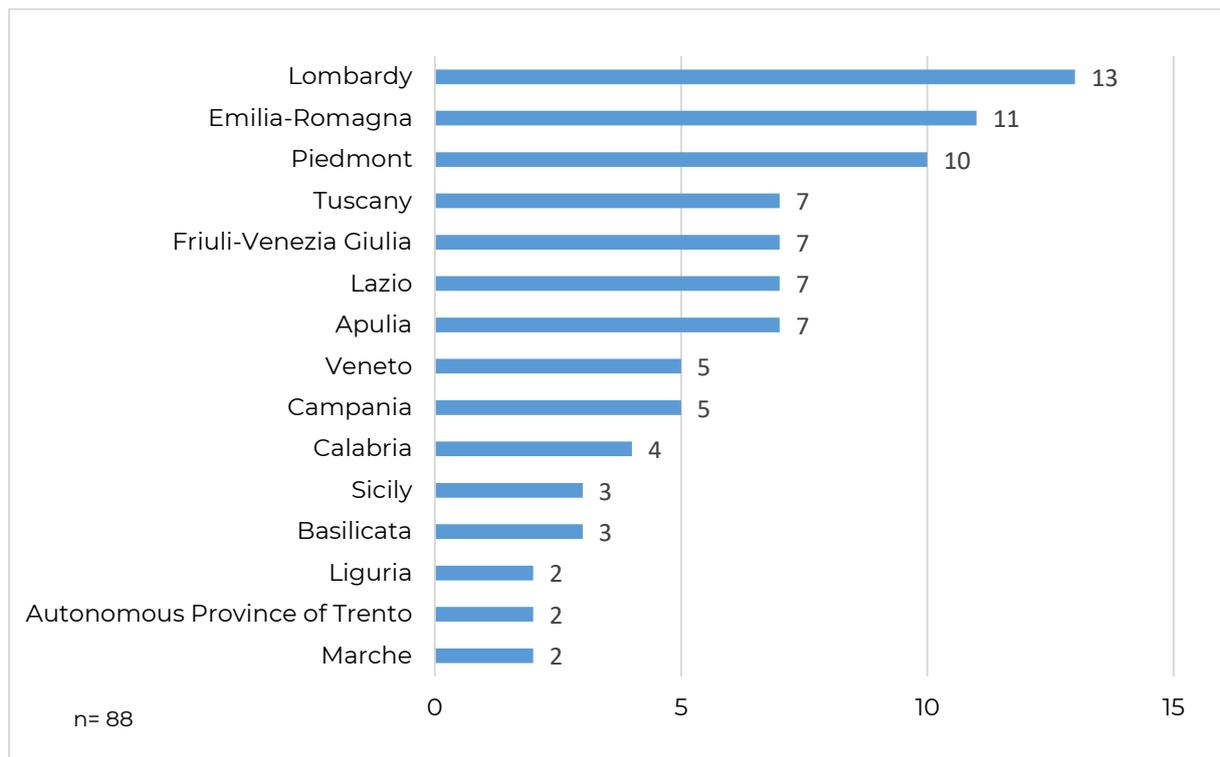
Source: ECCP (2022), own elaboration based on data from Eurostat.



## Cluster organisations in the regions

There are 88 cluster organisations registered on the ECCP in the country. The regions with the most profiled cluster organisations on the ECCP are Lombardy, Emilia-Romagna and Piedmont. Liguria, the Autonomous Province of Trento and Marche are among the regions with the lowest number 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 (87%, EU: 84%) followed by large enterprises (7%, EU: 9%) and research organisations (7%, EU:7%) constitute the majority of member organisations of Italian cluster organisations with profiles on the ECCP. From a thematic perspective, these Italian 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 (8 cluster organisations)
- Health (6 cluster organisations)
- Construction (6 cluster organisations)
- Mobility-Transport-Automotive (6 cluster organisations)
- Creative & Cultural Industries (6 cluster organisations)
- Agri-food (4 cluster organisations)
- Aerospace & Defence (4 cluster organisations)
- Renewable Energy (4 cluster organisations)



- Proximity & Social Economy (4 cluster organisations)
- Textile (3 cluster organisations)
- Energy Intensive Industries (1 cluster organisation)
- Tourism (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 Italian cluster policies 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 column represents the case of an Italian broad policy on the national level, whilst the third represents an exemplary regional broad policy in Italy. This factsheet showcases a new example of a regional cluster policy in Italy for the region of Piedmont.

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 Italy.

Policy type:	Broad policy	Broad policy (regional example of Piedmont)
Policy name:	Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
<b>POLICY OBJECTIVES</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 the consolidation of existing cluster organisations</b> <b>Supporting the creation of new cluster organisations</b> <b>Promoting entrepreneurship, start-ups and spin-offs</b> <b>Promoting resilience and sustainable economy and other solidarity-based initiatives</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>Strengthening the network of cluster organisations/cross-clustering</b> <b>Fostering R&amp;D activities, technology development and implementation</b> <b>Fostering innovation and strengthening innovation ecosystem</b> <b>Supporting cluster excellence and professionalisation of cluster management</b> <b>Supporting the consolidation of existing cluster organisations</b> <b>Supporting the creation of new cluster organisations</b>



Policy type:	Broad policy	Broad policy (regional example of Piedmont)
Policy name:	Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
	<p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Enhancing territorial cohesion (through RIS3)</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p> <p><b>Cluster analysis and support for policymaking</b></p> <p><b>Increase supply chain resilience</b></p> <p>The contribution that the Strategy intends to make to this overall objective of transformation of the national economic system is to promote the creation in the country of a true innovation and competitiveness chain, capable of transforming the results of research and innovation into a competitive advantage for our production system and into an effective increase in the well-being of citizens.</p> <p>The SNSI is aimed at achieving this goal through targeted interventions such as: valorisation, specialisation and organisation of the public research system national research system by promoting the development of an industrial research and technology transfer network and enhancing the investments already made at both central and territorial level; enhancing and strengthening the available human capital, an increasingly indispensable factor of the new knowledge-based economy; implementation of public policies for businesses that aim to maximise the impact of research and innovation on competitiveness and on the actual industrialisation and market potential of and market potential of investments financed with public resources; implementation of public policies for innovation risk sharing that aim to foster the commitment of companies, the financial system and the research system in major innovation</p>	<p><b>Promoting entrepreneurship, start-ups and spin-offs</b></p> <p><b>Promoting resilience and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p>The policy objectives, of Piedmont's Intelligent Specialisation Strategy ("Strategia di Specializzazione Intelligente (S3) del Piemonte"), are to identify the specialisations best suited to Piedmont's innovation potential, encouraging stakeholders to share a common vision of the policy actions to be undertaken and channelling investments and the use of ESIF in the best possible way, with the aim of improving innovation processes. Such a path was already successfully launched in the previous programming period; the present S3 was created by building on the lessons learnt in the 2014-2020 period, reinforcing the successful elements and at the same time improving some aspects that proved to be less effective. The new S3 therefore aims to refine the tools already envisaged by the Strategy for the 2014-2020 programming period or to introduce new ones that are more appropriate to the changes that have taken place and that better respond to the needs that have emerged in the meantime, not least those created by the Covid-19 pandemic.</p>



Policy type:	Broad policy	Broad policy (regional example of Piedmont)
Policy name:	Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
	<p>initiatives, on the basis of on the basis of a shared model for risk assessment and the allocation of costs and benefits among the players involved ; and finally, accompanying the existing production system in the transition phase towards the new organisation of production.</p> <p>Further the SNSI has as an objective strengthening the national research and innovation system while avoiding duplication of interventions passes through the integration between the National Strategy for Smart Specialisation and the other programming documents on the subject for the period 2014-2020: the National Programme for Research (PNR) and the National Plan for Research Infrastructures (PNIR).</p>	
POLICY FOCUS	<p><b>No specific focus (Cross-Sectoral)</b></p> <p>The Strategy identifies some national thematic areas, on which to focus that represent the new target markets below:</p> <ul style="list-style-type: none"> <li>- Smart and sustainable industry, energy and environment</li> <li>- Health, food, quality of life</li> <li>- Digital Agenda, Smart Communities, Intelligent Mobility Systems</li> <li>- Tourism, Cultural heritage and Creativity Industry</li> <li>- Aerospace and Defence</li> </ul>	<p><b>Cross-sectoral</b></p> <p>The thematic focus of Piedmont's Intelligent Specialisation Strategy are renewable energies, green resources and materials, information technologies, (digital agenda), food industries, aerospace industries, mobility, advanced manufacturing, and health.</p>
	<p><b>In charge of drafting</b> (Ministry of the Economic Development together with the Ministry of the Education, University and Research: More precisely for the purpose created Steering Committee composed of representatives</p>	<p><b>In charge of drafting</b> (Regione Piedmont, 'Competitiveness Directorate of the Regional System', University System, Right to Study, Research, and Innovation Sector, with the support of IRES Piemonte)</p>



Policy type:	Broad policy	Broad policy (regional example of Piedmont)
Policy name:	Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
<p style="text-align: center;"><b>RESPONSIBLE</b></p>  <p style="text-align: center;"><b>AUTHORITIES</b></p>	<p>of the administrations concerned and the autonomous regions and provinces)</p> <p><b>In charge of implementation:</b> PON Research and Innovation (R&amp;I) and the PON Enterprise and Competitiveness (I&amp;C)</p> <p><b>Oversees the implementation</b> (PON Research and Innovation (R&amp;I) and the PON Enterprise and Competitiveness (I&amp;C)</p> <p><b>In charge of monitoring</b> (Agenzia per la Coesione Territoriale)</p>	<p><b>In charge of implementation</b> (Regional System Competitiveness Directorate, specifically the Sector 'University System, Right to Study, Research and Innovation')</p> <p><b>Oversees the implementation</b> (Regione Piedmont 'Competitiveness Directorate of the Regional System', NUVAL 'Nucleo di valutazione e verifica degli investimenti pubblici della Regione Piemonte', with the support of IRES)</p> <p><b>In charge of evaluation and monitoring</b> (NUVAL 'Nucleo di valutazione e verifica degli investimenti pubblici della Regione Piemonte', with the support of IRES)</p>
	<p>The National strategy is drafted by the Ministry of the Economic Development together with the Ministry of the Education, University and Research: More precisely the National strategy foresees the creation of a Steering Committee composed of representatives which purpose it is to define and adopt the implementation plans of the strategy that refer to the national thematic areas.</p> <p>The Strategy is implemented through direct initiatives of the NOP Research and Innovation (R&amp;I) and the NOP Enterprise and Competitiveness (I&amp;C) and through strategic plans where public resources from cohesion policy, ordinary national and regional resources, and private resources can converge.</p> <p>The National and the Regional strategies are interlinked, not only because the former stemmed from the latter, but also because the regional strategies provide solely a framework within which policy initiatives need to be developed. This policy is merely a framework within which policy initiatives need to be developed, it does not provide any direct funding to beneficiaries. Funding is provided by specific measures, such as calls for tender on the</p>	<p>On the regional level the responsible authorities, namely the Regional Council, identified the 'University System, Right to Study, Research and Innovation' Sector of the Regional System Competitiveness Directorate ("Sistema Universitario, Diritto allo Studio, Ricerca e Innovazione" as the body responsible for managing S3.</p> <p>The National Resilience Plan (PNRR, Piano Nazionale di Ripresa e Resilienza), Smart National Smart Specialisation and the Regional strategies are interlinked and aligned. Further the Regional strategies provide solely a framework within which policy initiatives need to be developed. Therefore, they do not provide any direct funding.</p>



Policy type:		Broad policy	Broad policy (regional example of Piedmont)
Policy name:		Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
		regional level and through the NOP Research and Innovation and the NOP Enterprise and Competitiveness.	
<b>BENEFICIARIES</b> 		<p><b>SMEs</b></p> <p><b>Cluster organisations</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>Technology centres</b></p> <p><b>General population</b></p> <p><b>Policy makers</b></p>	<p><b>SMEs</b></p> <p><b>Cluster organisations</b></p> <p><b>Research organisations</b></p> <p><b>Academic institutions</b></p> <p><b>Start-ups</b></p> <p><b>Technology centres</b></p> <p><b>General population</b></p> <p><b>Policy makers</b></p>
		<p>Since the Strategy does only provide an indicative direction and is not actually implemented on the national level the beneficiaries are chosen and defined by the different regional policies. However, the focus of the strategy aims at the development of broad measures able to target different parts of society, including citizens. While all the selected categories are mentioned throughout the document, two specific sections are dedicated to policy makers and SMEs.</p>	<p>The Strategy aims at the development of broad measures able to target different parts of the local economy and science in the areas of research, start-ups, cooperations as well as citizens. Increased cooperation between academic institution like Universities, Research hubs, Competence Centers, and private cooperation. Further, the strategy includes non-academic research institutes, so called Istituti Tecnici Superiori (Higher Technical Institutes) as well as further public, private-public and Private stakeholder, which c contribute to the regional Innovation Research and Development in various sectors.</p>
<b>INSTRUMENTS</b> 	<b>Financial</b>	<i>Data unavailable</i>	<b>No financial support</b>
	<b>Technical assistance</b>	<b>Support the Cabin of control in defining the strategy implementation plans</b>	<b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b>



Policy type:	Broad policy	Broad policy (regional example of Piedmont)
Policy name:	Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
	<p><b>Acquire the proposals for expressions of interest expressed by the relevant partnerships</b></p> <p><b>provide the Cabin of Control with any information aimed at carrying out the performance of the functions and duties of the control room itself</b></p>	<p><b>Support for soft skills development: coaching, management training, upskilling/reskilling</b></p> <p><b>Marketing activities: advertising, communication, events, fairs, and so on</b></p> <p><b>Support SME and start up's accessibility to digital, research and innovation infrastructure</b></p> <p><b>Support for networking and partnership building (at national and/or international level)</b></p>
	<p><b>Explanation</b></p> <p>The Strategy does not provide for any form of direct funding or technical assistance. Funding and assistance have been provided through two different calls for tender for the development of National Technological Clusters on Regional level.</p> <p>As far as the technical assistance is concerned the strategy does not foresee technical assistance to the beneficiaries but rather assistance to regional authorities. It is further foreseen, to allow a revision and modification of single components of the SNSI, on the basis of the monitoring results, through the responsible authority of implementation, the steering committee. Further, the strategy plans to create working groups, which provide support to the steering committee in the definition of implementation plan for the national strategy, acquire the proposed interest by the relevant partnerships, and provide the steering committee, with any information aimed at carrying out the functions and tasks needed, upon request.</p> <p>The first one in 2012 (Ministry of Education, University and Research - Decreto Direttoriale 30 maggio 2012 n. 257) with an overall budget of EUR 368 million (National budget) + EUR 40</p>	<p>The Piedmont cluster programme offers different types of support measures for innovation actors, such as SME's or startup through their regional authorities such as IRES and other cluster organisations. The support measures consist in network activities between SME's, start-ups and cluster organisations. Further IRES, the regional socio-economic research institute, plans to conduct a survey with ca. 1000 companies from the region in order to provide important knowledge about the current status of the regional economy.</p>



Policy type:		Broad policy	Broad policy (regional example of Piedmont)
Policy name:		Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
		million (of which EUR 20 million from ERDF). The second one in 2016, when the Ministry of Education, University and Research (MIUR) promoted the development of 4 more National Technological Clusters in the areas of: Cultural heritage; Design and creativity; Economy of the sea; Energy. The overall budget for the second call was of EUR 3,000,000 (National budget).	
<b>HISTORY</b> 	<b>Period</b>	<b>Not specified</b>	<b>Limited period</b>
	<b>Ending year</b> <i>(for policies with limited period)</i>	2020	2027
	<b>Starting year</b>	2014	2014
	<b>Explanation</b>	The National Strategy has been approved by the EU Commission in 2016. Cluster policies in Italy date back to the 1980s, the current	The Regional Strategy has been implemented in 2014 and has been updated in 2021 to be extended until 2027.



Policy type:		Broad policy	Broad policy (regional example of Piedmont)
Policy name:		Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
		cluster policy strategy can be traced back to 2009. Since then, the responsible authorities have been evaluating the former. The need to update the existing National Strategy for Intelligent Specialisation (SNSI), adapting it to the new criteria of the enabling condition introduced for the 2021-27 programming period, is being seized by Italian authorities, variously involved in research and innovation policies, as an opportunity to make these policies more effective. Herein forth, no National Strategy for the period of 2021-2027 has been available to the public.	The proposed update of the S3 2021-27 was drawn up in the light of the changes observed in the regional production system and the related innovation challenges identified, the strategic-programmatic reference framework at European, national and regional level, the results of various discussions and listening sessions with regional stakeholders, as well as building on the experience of the 2014-2020 programming period.
 <b>BUDGET</b>	<b>Overall</b>	Data unavailable.	Data unavailable.
	<b>Annual</b>	Data unavailable.	Data unavailable.
	<b>Source of funding</b>	<p>The National Strategy does not entail any form of direct funding. The SNSI foresees funding for the implementation of the regional strategy plans.</p> <p>For which in total for the period 2014-2020 a budget of 16 million euros was foreseen. This total budget added from various sources of national and European funding.</p> <p>Out of the total 16 million, 2.6 million were funded by the National Research and Innovation (R&amp;I) and the Enterprise and Competitiveness (I&amp;C) programs, almost 3 million came from the combined funding of the Ministry of Research and University (MIUR) and Ministry of economic development (MISE), further 2.2 million were added by the MIUR from private investments. 6.3 million were funded on the public regional level and further 2.4 million were added through regional private funding.</p>	ERDF (European Regional Development Fund) and PNRR (National Resilience Plan)
	<b>Availability</b>	<b>ex-ante</b>	<b>In-itinere</b>



Policy type:	Broad policy	Broad policy (regional example of Piedmont)
Policy name:	Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
<p data-bbox="255 405 360 427">POLICY</p> <p data-bbox="215 469 400 491">EVALUATION</p> 	<p data-bbox="465 405 555 427"><b>Results</b></p> <p data-bbox="607 421 1279 533">The implementation period of the 2014-2020 National Strategy Plan (SNSI) introduced as a guiding instrument an <i>ex-ante conditionality</i>, as requisites and precondition to use the budget.</p> <p data-bbox="607 555 1308 699">The general SNSI monitoring model is based on the identification of a few key indicators able to track the transformation of the national production system towards a new manufacturing with higher added value in which growth in productivity and employment are jointly realised employment.</p> <p data-bbox="607 721 1285 775">The monitoring and evaluation take into account, the following indicators:</p> <ul data-bbox="607 798 1308 1362" style="list-style-type: none"> <li>- the level of achievement of the strategy's overall objective, joint growth in productivity and employment, through a macroeconomic impact analysis model of R&amp;D investment, applicable to all national thematic areas.</li> <li>- the level of achievement of the overall objective of the strategy at company level, through micro result indicators.</li> <li>- the performance of specific factors that correspond to the levers that the strategy intends to activate through output indicators, which can signal the transformation of the economic system economic system. For example, the growth of employment in knowledge-intensive sectors indicates that the country's innovative production system can generate a demand for skilled workers on which both the creation of new economic value and its distribution. Or, again, the increase in exports of knowledge intensive out of the country's total exports of goods and services, which indicates the ability to have market shares in some of the highest value-added sectors of global value chains. global value chains.</li> </ul>	<p data-bbox="1339 421 2040 596">The updated Smart Specialisation Strategy (S3) foresees yearly- itinere evaluations and monitoring mechanisms necessary to provide a measurement of its progress and estimate its effectiveness, due to the short period of time since the start of the strategy, however, no evaluation or monitoring report were published, yet.</p> <p data-bbox="1339 619 2018 762">Referring, on the last available evaluation conducted for the previous Smart Specialisation Strategy 2014-2020, in 2017 by the responsible authority, IRES Piemonte (public socio-economic research institute in support of local government), following observation were made:</p> <p data-bbox="1339 785 2040 1168">The share of companies focused on at least one of the 12 thematic areas grew by 2.7% in 2017, compared to 2015. The area with the highest share of companies is Design, creativity and Made in Italy. When comparing the 12 thematic areas and NACE sectors, there is a higher concentration of companies in the electronic, optical, machines and services industries. Companies that belong to the 12 areas are mostly located in the North-west (29.7%) and North-east (25.9%). Companies specialised in one of the thematic areas tend to have higher labour productivity and turnover. They also tend to grow bigger in term of employees. In terms of innovation, 51% of "smart specialisation" companies have introduced new technologies, 43% have created new products, 36% have introduced new internal organisation.</p>



Policy type:	Broad policy	Broad policy (regional example of Piedmont)
Policy name:	Strategia Nazionale di Specializzazione Intelligente (SNSI)	Strategia di Specializzazione Intelligente
<b>POLICY ALIGNMENT WITH THE EU PRIORITIES</b> 	<b>Green economy</b> <b>Digitalisation</b> <b>Resilience</b>	<b>Green economy</b> <b>Digitalisation</b> <b>Resilience</b>

# 03

## State of play of cluster policy



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



### 3. State of play of cluster policy

This section presents an overview on the state of play of Italian 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) 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.

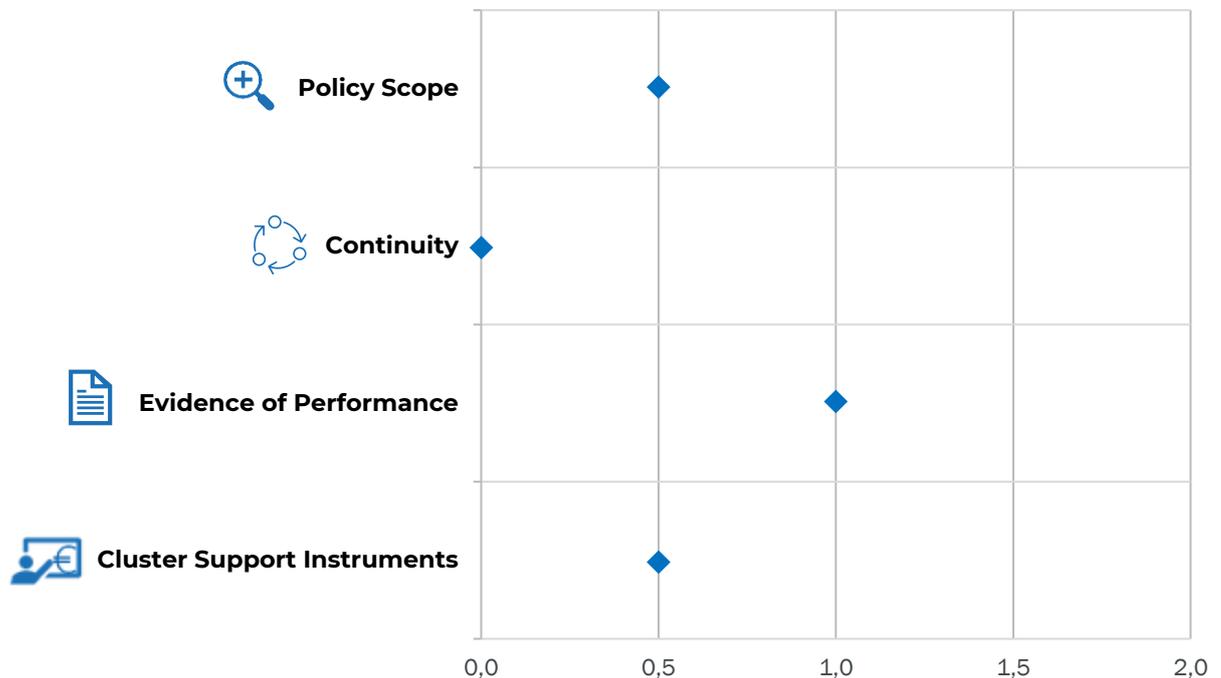
The table below presents an overview of the **maturity assessment for Italy** for 2022. The total score of Italy is 2 points out of 8.

Italy	MATURITY ASSESSMENT	Max score	Actual score
<b>POLICY SCOPE</b>	Absence of cluster policy	0	
	Broad policy	0,5	<b>0,5</b>
	Sectoral policy	1	
	National and/or regional cluster policy	2	
<b>CONTINUITY</b>	No cluster-specific policy available	0	<b>0</b>
	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>EVIDENCE OF PERFORMANCE</b>	No evaluation and / or monitoring available	0	
	Existence of evaluations of past policies	0,5	
	Existence of monitoring or an ongoing / interim evaluation	1	<b>1</b>
	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	<b>0,5</b>
	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>TOTAL (8)</b>			<b>2</b>

Drawing from the table above that showcases the scored points in Italian 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 - Italy**



Source: ECCP (2022)

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

### **Policy scope**

In terms of policy scope and approach the cluster policy in Italy is characterised by a mix of national and regional level coordination of clusters. While the national strategy provides an overarching structure of guidance, monitoring and coordination for the regional level strategies which scope it is to implement the cluster policies in accordance with the national, thus the development and facilitation of cluster initiatives is financed regionally and based on regional strategies, of which 21 (one for each region) exist. In Piedmont, for example the cluster policy is seen as a part of the innovation and smart specialisation strategy. While national evaluation focuses more on aggregated macroeconomic indicators of all regional strategies, the evaluation and monitoring are carried out regionally. In case of Piedmont, for example, the INES as the regional socio-economic research institute monitor and evaluate key indicators on an annual basis and reports to the 'Competitiveness Directorate of the Regional System' as responsible authority.

### **Continuity**

At the moment, only a broad cluster policy dedicated to clusters is available. The first cluster policy in Italy can be traced back to the 1980s, so called "Distretti industriali" were part of regional development. However, this type of regional development plan lacked the aspect of knowledge spill overs and involvement of public and private research entities. Since then, cluster policy has grown rapidly and spread to different regions, which have implemented their own cluster policies and included the above-mentioned missing part of cluster policy. On a national level the current National Strategy plan can be traced back to 2007-2013, when the MIUR (Ministry of University and Research) and the Ministry of economic cohesion initiated the



first programme dedicated to national technological cluster. Piedmonts cluster policy can be traced back at least to the year 2009.

The Italian national strategy plan is intended to coordinate, create coherence, and monitor the regional plans on a national level. While the current cluster policy term already initiated, the national strategy plan for 2021-2027 seems to be still in drafting phase. Thus, only general objectives and a consulting document is accessible. The accessible national strategy plan is the one from the 2014-2020 term. However, regional strategy plans, such as the Piedmonts regional plan are already implementing policies for the 2020-2027 term. This creates a discrepancy between the national level of coordination and the regional implementation level, however, according to available consultancy documents the 2020-2027 a national strategic plan is currently being prepared.

### **Evidence of performance**

The updated Smart Specialisation Strategy (S3) foresees yearly-itinere evaluations and monitoring mechanisms necessary to provide a measurement of its progress and estimate its effectiveness, due to the short period of time since the start of the strategy, however, no evaluation or monitoring report were published, yet. However, for the Piedmont regional strategy plan from the 2014-2020 term an interim evaluation is available. The interim evaluation conducted by IRES (socio-economic research Institute of Piedmont) conducted in 2018, reports how the regional strategy has already achieved partially or fully some of the planed objectives and suggest focussing the regional strategic plan efforts into the following innovation factors: digitalization, circular economy and the health sector. The latter contributes to the flexibility to adapt on a regional level to changing circumstances and use the interim evaluation to further improve the performance of the regional strategy plan.

### **Cluster support instruments**

The Italian National Strategy Plan does not offer direct financial or technical support instruments to beneficiaries, but rather support the regional authorities to do so and creates the framework for the funding budget allocated from the ministry to the regional authorities.

The support measures provided by the piedmont cluster programme consist of networking activities between SMEs, start-ups and cluster organisations. In addition, IRES, the regional socio-economic research institute, plans to conduct a survey of about 1000 companies from the region to gain important insights into the current state of the regional economy. These are targeted for the main beneficiaries of the regional strategy, namely, for innovation actors, such as SMEs or start-ups, through their regional authorities such as IRES and other cluster organisations.

### **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. The Italian cluster organisations have been involved in 69 consortia of the European Strategic Cluster Partnerships out of which 48 partnerships were focusing on internationalisation (ESCP-4i) and 21 partnerships were on cluster management excellence (ESCP-4x). Consortia partners came from 2 different EU member states (ES, FR, HU, CZ, IE, PL, UK, DK, TR, EL, DE, RS, SK, AT, PT, RO, BG, BE, NL, EE, SE, FI). 18 Italian cluster organizations participated in the INNOSUP-1 initiative with partner organisations coming from 22 countries (ES, PL, BE, SI, NO, CZ, HU, FR, DE, FI, IE, CH, GR, PT, EL, RO, AT, DK, SE, NL, UK, TR).

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 Italy, 21 cluster organisations are part of 17 Euroclusters with partner from 19 countries (SK, AT, ES, RO, BG, DE, FI, PL, LT, HU, BE, GR, CZ, FR, PT, LV, HR, SE, NL). These Euroclusters are AEC Eurocluster, AIBC Eurocluster, B-Resilient, CREATHRIV-EU, DREAM, EPICENTRE, EU Rural Tourism, EuroBoosTEX, FRIEND CCI, GEMSTONE, IKAT, LEVIATAD, MedBan, PIMAP4SUSTAINABILITY, RE-CENTRE, SILEO, Silicon Eurocluster, SocialTech4EU. Collectively, they cover all 14 industrial ecosystems. Some



Euroclusters cover multiple ecosystems, such as EPICENTRE (covering "Agri-food," "Digital," and "Health") or MedBan (covering "Tourism", "Mobility-" and "Renewable Energy").

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

Source: ECCP (2022)