



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Belgium

An initiative of the European Union





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01

Introduction and economic policy context



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1. Introduction and economic policy context



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

The European Semester is an instrument introduced to coordinate the EU Member States' economic policies and address the economic challenges faced by the EU. Its goals are "to ensure sound public finances, to prevent excessive macroeconomic imbalances in the EU, to support structural reforms to create more jobs and growth, and to boost investment". Thus, it focuses on the following areas: business environment; financial and fiscal stability; green economy; public administration; labour market and skills; and, social protection and cohesion. Chapter 4.2 provides an overview on how Belgium's cluster policy can help to tackle the economic policy challenges identified in the European Semester country recommendations.

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 the 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 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.

Belgium's recovery and resilience plan¹ is structured around six pillars: climate, sustainability, and innovation; digital transformation; mobility; social and inclusiveness; economy of the future and productivity; and public finances. Clusters are mentioned in the National recovery and resilience plan and will be an important stakeholder for the implementation of those pillars. In Belgium industry, research, and innovation aspects as well as cluster support are handled by the regional authorities.

The [Flanders ERDF OP 2021-2027 OP](#) mentions the expansion of investments at existing cluster organisations (including recognised spearhead clusters) under RSO1.1. Develop and strengthen research and innovation capacity and introduce advanced technologies. Clusters are among the beneficiaries. The [Walloon ERDF OP 2021-2027](#) mentions clusters/*pôles de compétitivité* under Measure 5b. - Venture capital tool, support for innovation and seed: and commercialisation. Here, it is stated that coordination units have been set up which should include representatives of the relevant *pôles de compétitivité* or cluster organisations.

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

- 1) an overview of the industrial ecosystems and cluster landscape in Belgium,
- 2) an overview of the Flemish and Walloon regional cluster policies,
- 3) an assessment of the state of Belgian cluster policy and its role in broader economic policy challenges mentioned in the European Semester Reports.

¹Belgium's recovery and resilience plan, <https://dermine.belgium.be/sites/default/files/articles/FR%20-%20Plan%20national%20pour%20la%20reprise%20et%20la%20re%CC%81silience.pdf>

02

Industrial ecosystems and cluster landscape



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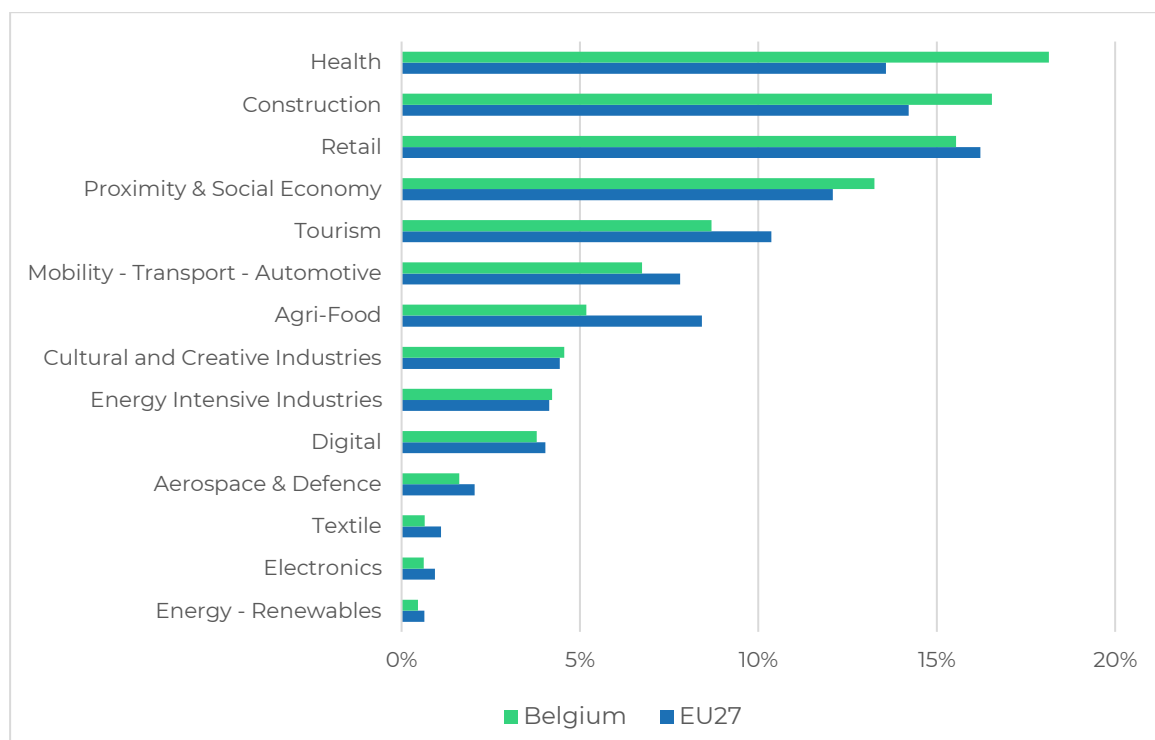
2. Industrial ecosystems and cluster landscape

2.1 Employment in the 14 industrial ecosystems

As part of its Industrial Strategy (March 2020), the European Commission has identified 14 industrial ecosystems that encompass all players operating in a value chain.² The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2 -digit activities, following the methodology established in the European Commission.³ This means that the data provided below can differ from other publications by the European Commission that do not consider the industrial ecosystem classification.

In the following figure, the employment share of Belgium 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. The three main ecosystems by employment for Belgium are “Health”, “Construction”, and “Retail”. In some industrial ecosystems (particularly in “Health”, “Construction”, and “Proximity & Social Economy”) Belgium has employment shares higher than the EU27 average which indicates the relative strength of the country in those industrial ecosystems.

Figure 1: Employment across the industrial ecosystems



Source: ECCP (2023), own elaboration from Eurostat.

² see here for more information <https://clustercollaboration.eu/in-focus/industrial-ecosystems> (last access 09.01.2023).

³ see European Commission (2021): Annual Single Market Report, SWD(2022).



2.2 Regional agglomerations

Economic activity is not equally distributed across regions in the EU but tends to agglomerate in certain places. In this context, an agglomeration is defined as the concentration of a certain industry, sector or ecosystem in a certain geographical area. The following section provides an analysis of, first, the sectoral agglomerations and, second, the ecosystem agglomerations in the regions. Agglomerations are operationalised through the employment-based Location Quotients (LQ), measuring the relative specialisation of one region compared to the EU level, as well as the employment size.

If the LQ for a given activity-region combination is above 1.5, it is considered an agglomeration, and if the activity accounts for at least 1 % of total employment in the region, it is considered regionally relevant.⁴ The following tables show the total number of regionally relevant agglomerations in each region in the country and identifies the top five most specialised of these agglomerations. The first table focuses on the 88 NACE 2-digit activities or sectors, totalling 23 agglomerations in the country, while the second table is based on the 14 ecosystems, which total 2 agglomerations in the country.

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

Region	# of agglomerations	Agglomeration 1	Agglomeration 2	Agglomeration 3	Agglomeration 4	Agglomeration 5
BE1: Brussels Region	10	U99 – Activities of extraterritorial organisations	K66 – Activities auxiliary to financial services and insurance	J61 – Telecommunications	M70 – Activities of head offices	N81 – Services to buildings and landscape activities
BE2: Flemish Region	6	U99 – Activities of extraterritorial organisations	N78 - Employment activities	M70 – Activities of head offices	C20 – Manufacture of chemical products	N81 – Services to buildings and landscape activities
BE3: Walloon Region	7	U99 – Activities of extraterritorial organisations	Q87 – Residential care activities	N78 - Employment activities	N81 – Services to buildings and landscape activities	Q88 – Social work activities

Source: ECCP (2023), own elaboration from Eurostat.

As mentioned at the beginning of this Chapter, the NACE 2-digit activities have been aggregated to the 14 EU industrial ecosystems following the methodology established by the European Commission. Table 2 provides an overview of the regional distribution of industrial ecosystem agglomerations. Overall, there are fewer numbers of ecosystem agglomerations compared to the regionally relevant sectoral agglomerations by NACE sectors. This more concentrated agglomeration can at least partially be linked to the methodology of measurement of the 14 industrial ecosystems. For the capital region of Brussels (BE1), its digital ecosystem hub is reflecting its NACE agglomerations in telecommunications (J61) and its auxiliary activities to financial services and insurance (K66), while its health ecosystem, less obviously, can be connected to activities of head offices (M70), considering that Belgium is one of the major European hubs for multinational corporations in the pharmaceuticals sector. This also further underlines the relevance of the health sector for Belgium that was outlined before in Figure 1.

⁴ 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 agglomerations

Region	Number of ecosystem agglomerations	Agglomeration 1
BE1: Brussels Region	1	Health
BE2: Flemish Region	0	-
BE3: Walloon Region	1	Health

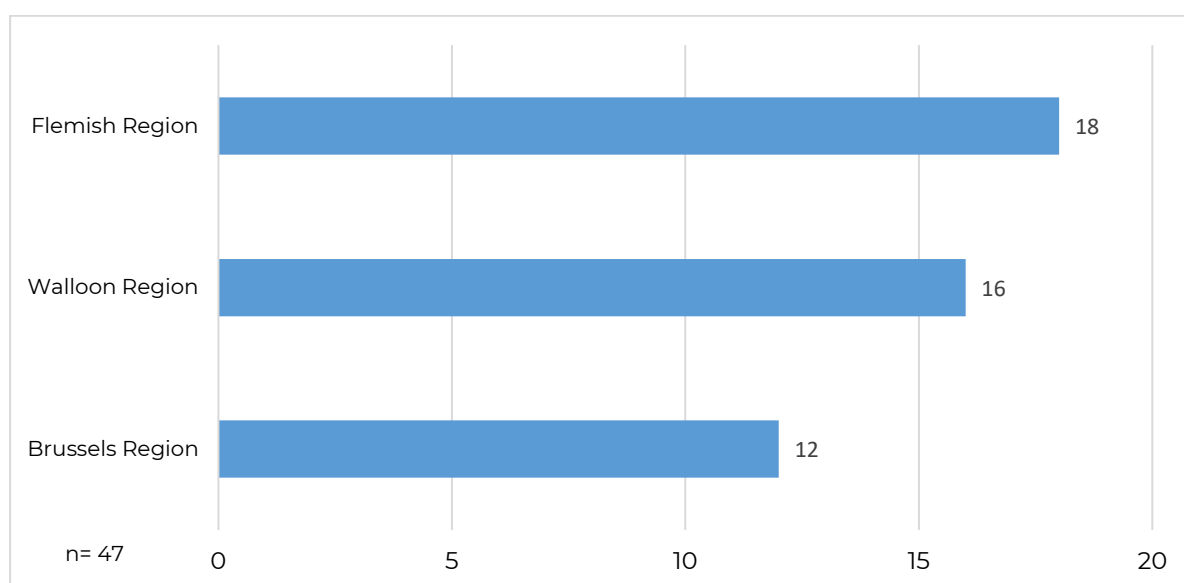
Source: ECCP (2023), own elaboration from Eurostat.

2.3 Cluster organisations & interregional cooperation

Cluster organisations in the regions

There are 46 cluster organisations registered on the ECCP from Belgium. With 18 cluster organisations the majority of Belgian cluster organisations registered on the ECCP are located in the Flemish region followed by 16 cluster organisations in the Walloon region and 2 cluster organisations in Brussels. These Belgian ECCP registered cluster organisations represent around 6,500 companies (around 1,000 large enterprises and around 5,500 SMEs). The following figure shows the presence of cluster organisations in the different regions.

Figure 2: Cluster organisations profiled and active on the ECCP



Source: ECCP (2023). Note: the data for the analysis was extracted on 21/12/2023.

SMEs (77%, EU: 83%) followed by large enterprises (14%, EU: 9%) and research organisations (9%, EU: 8%) constitute the majority of member organisations of Belgian cluster organisations with profiles on the ECCP. From a thematic perspective, these Belgian cluster organisations are operating in the industrial ecosystems listed below. Since cluster organisations on the ECCP can be allocated to multiple industrial ecosystems, the number of cluster organisations per industrial ecosystem can be higher than the overall number of cluster organisations in the country. Overall, the following list underlines that the Belgian strengths in terms of employment (e.g., in “Health”, “Digital”, and “Construction”) are also largely reflected in the Belgian ECCP registered cluster organisations.

- Health (6 cluster organisations)



- Digital (5 cluster organisations)
- Agri-food (5 cluster organisations)
- Construction (5 cluster organisations)
- Renewable Energy (5 cluster organisations)
- Energy Intensive Industries (5 cluster organisations)
- Mobility-Transport-Automotive (3 cluster organisations)
- Aerospace & Defence (2 cluster organisations)
- Creative & Cultural Industries (1 cluster organisation)
- Tourism (1 cluster organisation)
- Textile (1 cluster organisation)
- Electronics (1 cluster organisation)

Interregional cooperation

In the 2014-2020 funding period⁵, 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. Belgian cluster organisations have been involved in 42 consortia of the European Strategic Cluster Partnerships out of which 33 partnerships were focusing on internationalisation (ESCP-4i), six partnerships were on cluster management excellence (ESCP-4x) and three partnerships were on smart specialisation (ESCP-S3). Consortia partners came from 21 different EU member states (FR, DE, LT, PL, CZ, PT, SE, ES, IT, EE, DK, HU, TR, AT, UK, BG, NL, SK, LV, RO, EL). 21 Belgian cluster organisations participated in the INNOSUP-1 initiative with partner organisations coming from 21 countries (FR, NL, ES, IE, PL, PT, IT, SI, CZ, NO, HU, DE, UK, RS, LU, EL, LT, AT, DK, SE, EL).

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 Belgium, six clusters are part of eight Euroclusters with partners from 18 countries (FR, ES, EL, EE, DE, NL, PL, IT, LT, HU, RO, SE, DK, NO, PT, LV, HR). These Euroclusters are B-Resilient, BioMan4R2, CREATHRIV-EU, DREAM, ELBE Eurocluster, GEMSTONE, LEVIATAD and SocialTech4EU. Collectively, they cover nine industrial ecosystems: "Aerospace and Defence", "Renewables", "Digital Industries", "Cultural & Creative culture industries", "Mobility, transport and automotive", "Energy-intensive industries", "Agri-food", "Proximity and social economy", and "Health".

⁵ Many of the programmes of the 2014-2020 funding period have been terminated by December 2023. However, the collaborative projects that were funded may continue to operate.

03

National cluster policy, programmes and initiatives



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3. National cluster policy, programmes and initiatives


In this section, we provide an overview of the existing Belgian cluster policies at the regional level. In Belgium, industry, research, and innovation aspects as well as cluster support is handled by the regional authorities. 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 the Flemish cluster policy, whilst the third represents the Walloon cluster policy.

Furthermore, there is the case of '[Hub.Brussels](#)' in the Brussels-Capital Region, which collaborates with different actors and clusters involved in a variety of industries and sectors. However, Hub.Brussels qualifies more as a regional agency for business support in Brussels and not as a cluster policy, which is why it will not be elaborated on in greater detail, in parallel to the regional cluster policies in Flanders and Wallonia, respectively.


Within the table, the text presented in bold (black) depicts standardised categories across country factsheets (56 in total for 2023), which are applied for comparative purposes. This is followed by a complementary descriptive text to provide more insights into the cluster policy in Belgium.



Table 3: Overview of Belgian cluster policy

Policy type:	Regional cluster policy	Regional cluster policy
Policy name:	Flanders Innovation Clusters Policy	Walloon Region Competitive Clusters Policy
POLICY OBJECTIVES 	Strengthening cooperation between companies or industry and RTDI actors Increasing competitiveness and boosting scale-up of SMEs Supporting internationalisation activities Fostering R&D activities, technology development and implementation Promoting entrepreneurship, start-ups and spin-offs Promoting employment and upgrading skills and competences Strengthening the network of cluster organisations/cross-clustering Connect to global supply chains	Strengthening cooperation between companies or industry and RTDI actors Supporting internationalisation activities Enhancing the visibility of clusters Fostering R&D activities, technology development and implementation Fostering innovation and strengthening innovation ecosystems Promoting employment and upgrading skills and competences Cluster analysis and support for policymaking
	<p>Policy objectives are to increase collaboration amongst researchers, industry, and businesses, as well as improve competitiveness of businesses.</p>	<p>Walloon region has two cluster policies, Business and Competitive Cluster policies. Business clusters are bottom-up development and sector initiated, public support being ensured by a regional decree. Competitive clusters are developed through a top-down approach, Walloon region having set 6 prior sectors. For this study, the focus is on Competitive Clusters because they were initiated by the government. Policy objectives of Competitive clusters are to encourage R&D cooperation projects between research institutions, academia and industry, encourage knowledge transfer between industry, training and skills upgrading of personnel involved in innovation, promote Walloon businesses locally and internationally, and cluster development.</p>



Policy type:	Regional cluster policy	Regional cluster policy
Policy name:	Flanders Innovation Clusters Policy	Walloon Region Competitive Clusters Policy
POLICY FOCUS 	Sectoral <p>The policies focus is on organisations operating in Flanders in 7 spearhead domains, in line with the regional Smart Specialisation Strategy: agro-food, sustainable chemistry and synthetics, logistics and transport, new materials, energy, biotech, medical and digital technologies and blue economy. In addition, 20 innovative business networks have been operating and were supported by VLAIO over the last 5 years. Business networks are a specific type of Flemish clusters having a different scale, maturity time horizon and ambition level than the spearhead clusters. The projects are having a smaller scale and were only supported for three years.</p>	Sectoral <p>The Walloon region has set 6 prior sectors which are (1) health, (2) green chemistry, innovative and sustainable construction and building materials, environmental technologies and cleantech, (3) transport, logistics and mobility, (4) mechanical engineering, (5) aerospace and (6) agrifood industry.</p>
	Both drafting and implementation Provides funding Oversees the implementation <p>Flanders Innovation & Entrepreneurship (VLAIO) is responsible for drafting and implementing the cluster policy. This is based on the Decree of the Flemish Government March 4th, 2016. The agency is also responsible for funding the cluster organisations (50% funding + 50% private contributions from businesses).</p>	Both drafting and implementation Provides funding Oversees the implementation <p>The policy was designed by the Walloon Government through the Public Service for Economy, Employment and Research (SPW EER) which is also the managing authority. Each Competitiveness cluster is managed by a Board composed by academics and industrialists. The government oversees and aids the projects selected by the clusters in the framework of their own strategy. The government also provides funding to cover part of operational costs through the government agency Public Service of Wallonia.</p>
	SMEs Cluster organisations	Cluster organisations Research organisations



Policy type:		Regional cluster policy	Regional cluster policy
Policy name:		Flanders Innovation Clusters Policy	Walloon Region Competitive Clusters Policy
BENEFICIARIES 		Research organisations Academic institutions Large firms Technology centres Start-ups	Academic institutions Large firms SMEs Technology centres
<p>The policy targets two types of clusters, spearhead clusters and Innovative Business Networks. Spearhead clusters are large scale, ambitious initiatives, while Innovative Business Networks are smaller scale initiatives that take a bottom-up approach to implement initiatives in upcoming domains. Both clusters target SMEs companies operating in Flanders, knowledge centres, and large firms.</p>		<p>Based on a governmental initiative, Competitive clusters are mainly an industry-driven approach to encourage collaboration between industry, academia, and research institutions, it mainly targets research larges firms, SMEs, knowledge centres, clusters organisations, and academia.</p>	
INSTRUMENTS 	Financial	Funding collaboration initiatives (GBER art. 27) Support to R&D projects, SMEs becoming cluster members, etc. Financing start-ups	Funding collaboration initiatives Support to R&D projects, SMEs becoming cluster members, etc. Subsidies to hire personnel Subsidies for cluster infrastructure (e.g. offices, equipment)
	Technical assistance	Infrastructure: incubation and accelerator spaces, research centres, technology parks etc. Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence Support for soft skills development: coaching, management training, upskilling/reskilling	Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc. Support for soft skills development: coaching, management training, upskilling/reskilling Support for networking and partnership building (at national and/or international level)




Policy type:		Regional cluster policy	Regional cluster policy
Policy name:		Flanders Innovation Clusters Policy	Walloon Region Competitive Clusters Policy
HISTORY 		Support for networking and partnership building (at national and/or international level)	
	Explanation	The policy offers support for cluster organisations and for R&D projects, business support, business creation, investments, starting incubators, entrepreneurship support and opportunities to network with knowledge sharers.	The Competitive Cluster policy offers support for R&D, attraction of foreign investment and exports, investment subsidies, infrastructure and equipment, and hard skill and soft skills training.
	Period	Limited period	Unlimited period
	Ending year <i>(for policies with limited period)</i>	Spearhead Clusters =2026 Business Innovative Networks = 3 years after start of each individual project	No indication that the policy is limited
	Starting year	2016	2005
	Explanation	The policy was put in place by the Flemish Government March 4th, 2016. Spearhead Clusters have a maximum financing of up to 10 years. Ending year= 2026. Business Innovative Networks have a maximum financing of 3 years. Ending year= 3 years after start of each individual projects.	The Competitive Clusters policy was launched in 2005 by Walloon Region on the basis of a study of the leading sectors in Wallonia. Their mission is to initiate innovative projects resulting from the synergy between companies, universities, and research centres and centres of competence. Competitive Clusters are mainly supported to carry out investment, research and development or training projects in line with their own strategy, with a view to valorisation, particularly at the international level.
	Overall	No data available	No data available



Policy type:		Regional cluster policy	Regional cluster policy
Policy name:		Flanders Innovation Clusters Policy	Walloon Region Competitive Clusters Policy
BUDGET 	Annual	No data available	Data not available
	Source of funding	For the cluster organisations, 50% of funding comes from Flemish Government and 50% from private investors.	Part of the funding is provided by the Walloon government through the implementing Agency Public Service of Wallonia. Private investors also contribute towards the programme.
POLICY EVALUATION	Availability	in-itinere	in-itinere
	Results	<p>Every second year the cluster organisations are subject to an intermediary evaluation. This consists of a self-evaluation and an update of the work programme. Together with an evaluation of results and impact, this will motivate the decision on the continuation of the financial support to the cluster organisation by VLAIO.</p> <p>After five years, the number of companies involved in cluster organisations grew over 3.000; 302 cluster projects were initiated and raised EUR 291 million in support, complemented with EUR 122 million from private companies. An evaluation of the yearly impact of the cluster policy revealed that the cluster programme contributed in 2021 to EUR 34 billion additional turn over; cluster members also see the added value of participating in a cluster: 70% of the member companies sees or expects to see a contribution to their competitiveness in the short term due to their involvement in the cluster activities.</p>	Over 467 projects so far, out of which 335 were R&D projects. Projects led to over 187 international collaborations, over 190 patent applications and 13 licenses sold. This has led to the creation of over 4,205 jobs and 27 companies. In terms of knowledge transfer and training, there have been difficulties reaching the main target audience (employees of SMEs) because trainings did not always correspond with their needs and there was not an overall strategy.



Policy type:	Regional cluster policy	Regional cluster policy
Policy name:	Flanders Innovation Clusters Policy	Walloon Region Competitive Clusters Policy
POLICY ALIGNMENT WITH THE EU PRIORITIES 	Green economy Digital economy Resilience	Green economy Digital economy Resilience

Source: ECCP (2023).

04

State of cluster policy and its role in broader economic policy



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4. State of cluster policy and its role in broader economic policy challenges

4.1 The state of cluster policy

This section presents an overview on the state of play of Belgian cluster policy in the form of a qualitative assessment across four categories of analysis – policy scope, continuity of cluster policies, evidence of performance, and the range of cluster support instruments. Please refer to the **Annex** for the detailed overview of the categories and the scoring system. The table below presents an overview of the **state of play of Belgian cluster policy** for 2023.

Table 4: State of play

Belgium	State of play
POLICY SCOPE	Absence of cluster policy
	Broad policy
	Sectoral policy
	National and/or regional cluster policy
CONTINUITY	No cluster-specific policy available
	Cluster policy established recently
	Cluster policy established between over 2 and 10 years
	Cluster policy established over 10 years ago
EVIDENCE OF PERFORMANCE	No evaluation and / or monitoring available
	Existence of evaluations of past policies
	Existence of monitoring or an ongoing / interim evaluation
	Existence of monitoring and ex-ante or ongoing / interim evaluation
CLUSTER SUPPORT INSTRUMENTS	No instruments for cluster development
	Financial support for cluster development in the broader and / or sectoral policy
	Financial or technical support for cluster development in dedicated cluster policy
	Financial and technical support for cluster development in dedicated cluster policy

Source: ECCP (2023).

The text below provides a **qualitative description** of the state of play of the cluster policy in Belgium.

Policy scope

Belgium does not have any national cluster policies; it however has regional cluster policies. Belgium is divided into three Regions: Flemish Region, Walloon Region and Brussels-Capital Region. Each of these regions have developed cluster policies based on industries in their regions.



For example, the Flemish Region has cluster policies dating back to the late 1980s/early 90s with clear continuity through the years and through several government changes. Walloon Region has the Competitive and Business Clusters Policies (both in progress but pursuing different goals: networking and support of collaborative RDI projects).

Continuity

The Flemish government developed the earliest cluster policies in Belgium. In the late 1980s- 90s, the government developed a top-down cluster policy that designated six clusters to encourage collaboration amongst the different sectors. In 1999, cluster initiatives were integrated into the "Innovation Decree," which gave the Flemish government authority to expand the R&D policy to include more organisations such as SMEs and research organisations. From this came demand-driven cluster networks or "Competence Poles" in 2005. In 2006, the government developed the "Flanders in Action" programme policy targeting smart specialisation. Building upon the "Flanders in Action" Programme, Flanders has the "Flanders Innovation Clusters" policy today.

As with the Flemish Region, Walloon Region also has a history of cluster policies dating back to the early 2000s, with the implementation of pilot projects clusters in 2001, the emergence of competitive clusters in 2005. From 2007 onwards, the Business and Competitive Cluster policies was initiated. Cluster policies in Belgium do not appear to have gap periods; with each terminated policy, a new policy has been implemented almost immediately.

Evidence of performance

Regional cluster policies are constantly monitored by the implementing body. In Flanders, every second year, cluster organisations are subject to an intermediary evaluation. After five years, the number of companies involved in cluster organisations grew over 3.000; 302 cluster projects were initiated and raised EUR 291 million in support, complemented with EUR 122 million from private companies. An evaluation of the yearly impact of the cluster policy revealed that the cluster programme contributed in 2021 to EUR 34 billion additional turn over cluster members also see the added value of participating in a cluster. In Wallonia, 467 projects out of which 335 projects were R&D projects, have been completed. Projects led to over 187 international collaborations, over 190 patent applications and 13 licences sold. This has led to creation of over 4,205 jobs and 27 companies created.

Cluster support instruments



In the Flemish as well as the Walloon regions of Belgium, non-financial and financial support instruments are offered in the context of the regional cluster policies. As financial and non-financial instruments, the Flemish region offers support for R&D, business support, business creation, investments, starting incubators, entrepreneurship support and opportunities to network with knowledge sharers. The Walloon Competitive Cluster policy offers support for R&D, attraction of foreign investment and exports, investment subsidies, infrastructure and equipment, and hard skill and soft skills training. Business clusters are also supporting the development of SMEs and their integration into ecosystems.



4.2 Cluster policy's potential impact on challenges identified in the European Semester Report

Cluster policy can provide important support to broader economic policy efforts. This section shows how Belgian cluster policy can play a role in addressing the challenges identified in the European Semester Report for the country. To this end, the European Semester 2023 country report for Belgium⁶ has been analysed across policy areas relevant to cluster policy. The results point to a series of issues where cluster policy can play an important role in tackling the country's economic challenges.

Table 5: Contribution of Belgian cluster policy to the challenges identified in the European Semester Reports

Policy area	Challenges	Cluster policy
SKILLS 	<ul style="list-style-type: none"> • Structural weaknesses in the labour market • Labour shortages • Skills mismatches, in particular for the green transition. 	<p>Both regional cluster policies from Belgium for Walloon and the Flemish region aim at promoting employment and upgrading skills and competences and provide technical support for the development of hard and soft skills.</p> <p>Research underlines the role of clusters in developing the skills of the workforce and attracting skilled workers to a region.⁷ Moreover, as cluster organisations act as intermediaries between companies and research and educational institutions, they can also be seen as part of the training and educational infrastructure in the innovation ecosystem.⁸</p>
GREEN TRANSITION 	<ul style="list-style-type: none"> • Decarbonisation of the industry • Increased energy efficiency in the industry 	<p>The cluster policies at hand both focus on industries relevant for the green transition.</p> <p>This includes industries such as green chemistry, innovative and sustainable construction and building materials, environmental technologies and cleantech (Walloon region) and agro-food, sustainable chemistry and synthetics, energy and biotech (Flanders). As an illustrative example as part of the Flemish cluster policy, the "Waterstof industry cluster" can also be mentioned which is a network for the hydrogen applications.⁹</p> <p>Studies show that clusters can play a vital role in the green transition of the economy¹⁰ and it can be underlined that cluster organisations have a positive influence on the green transition, not least because they facilitate exchange between different actors, disseminate relevant knowledge and practices and</p>

⁶ https://economy-finance.ec.europa.eu/document/download/902ee834-3f42-409f-bce1-c32193fa2c0e_en?filename=BE_SWD_2023_601_en.pdf

⁷ Hsu et al. (2014).

⁸ European Expert Group on Clusters (2020).

⁹ <https://www.waterstofnet.eu/en/about-the-waterstof-industrie-cluster/about-the-cluster> (last access 24.05.2024)

¹⁰ Lis and Mackiewicz (2023); ECCP (2021).



Policy area	Challenges	Cluster policy
		deepen environmental awareness among stakeholders. ¹¹

Source: ECCP (2023)

¹¹ Hatch et al. (2017).

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Annex

Table 6: Analytical framework for the state of cluster policy

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

Source: ECCP (2023).