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Country factsheet

China

Content

European Commission

01

Introduction and economic policy context

1. Introduction and economic policy context

This document presents an overview of the cluster policy in China. 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 OECD Economic Survey: China 2022. The Economic Surveys present the major challenges faced by the country, evaluates the short-term outlook, and makes specific policy recommendations.

According to the World Bank's China Economic Update June 2023[1], China's economic activity bounced back in the first quarter of 2023 with the reopening. The strong performance was spurred by the release of pent-up consumer demand, especially for services, some improvement in the housing sector, and policy support. China's GDP growth is projected to rise to 5.6 percent in 2023, led by a rebound in consumer demand. Capital spending in infrastructure and manufacturing is expected to remain resilient. Meanwhile, external demand is expected to remain soft with weak global growth impacting exports.

In the following, a succinct overview of the cluster policy in China will be provided. The structure of this factsheet generally encompasses:
1) an overview of national cluster policies and a regional cluster policy in China,
2) an assessment of the state of play of one national cluster policy.

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[1] See https://openknowledge.worldbank.org/server/api/core/bitstreams/1455dc02-21ba-4a6e-b5ec-7f9397ce4fd5/content (last access 31.10.2023).

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02

National cluster policy, programmes and initiatives

2. National cluster policy, programmes and initiatives

In this section we provide an overview of the existing Chinese cluster policies on a national level 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 and third column represent the case of two Chinese national cluster policies, whilst the fourth represents an exemplary regional cluster policy in China. This factsheet showcases a new example of a regional cluster policy in China for the region of Guangdong-Hong-Kong-Macao Greater Bay Area.

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

Table 1: Overview of Chinese cluster policy

Policy type:	National cluster policy	National cluster policy	Regional cluster policy (example of the Guangdong-Hong Kong-Macao Greater Bay Area)
Policy name:	TORCH Program	Cluster Cities	Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area
POLICY OBJECTIVES	**Strengthening cooperation between companies or industry and RTDI actors** **Increasing competitiveness and boosting scale up of SMEs** **Supporting internationalization activities**	**Strengthening cooperation between companies or industry and RTDI actors** **Supporting internationalization activities** **Enhancing the visibility of clusters** **Fostering R&D activities, technology development and implementation**	**Strengthening cooperation between companies or industry and RTDI actors** **Increasing competitiveness and boosting scale up of SMEs** **Supporting internationalization activities** **Enhancing the visibility of clusters**

Policy type:	National cluster policy	National cluster policy	Regional cluster policy (example of the Guangdong-Hong Kong-Macao Greater Bay Area)
Policy name:	TORCH Program	Cluster Cities	Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area
	Enhancing the visibility of clusters **Fostering R&D activities, technology development and implementation** **Fostering innovation and strengthening innovation ecosystems** **Promoting entrepreneurship, start-ups, and spin-offs** **Promoting employment and upgrading skills and competences** **Increase supply chain resilience**	**Fostering innovation and strengthening innovation ecosystems** **Promoting resilience and sustainable economy and other solidarity-based initiatives** **Promoting employment and upgrading skills and competences** **Increase supply chain resilience**	**Fostering R&D activities, technology development and implementation** **Fostering innovation and strengthening innovation ecosystems** **Promoting entrepreneurship, start-ups, and spin-offs** **Promoting employment and upgrading skills and competences** **Increase supply chain resilience**
	The TORCH Programme is China's central cluster policy to foster economic growth, entrepreneurship, and the development of technology infrastructure. The programme kick-started Chinese high-tech innovation and start-ups through Innovation Clusters, Technology Business Incubators, Seed Funding (Innofund), and the Venture Guiding Fund. As part of this programme, Science and Technology Industrial Parks were created, including a national network	The City Clusters policy aims to create 19 super-regions in China that are focused on regional specialization, three of which are priority objectives, by accumulating businesses, R&D institutions, and universities within a city cluster. The improvement of infrastructure within a cluster and across clusters as well as social and employment opportunities are a central aspect of the City Clusters policy. A central part of this policy is also to raise the barriers to obtaining an official residency permit (hukou) in the wealthiest cities and	The 'Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area' (in some sources also referred to as Pearl River Delta) is derived from the national City Clusters policy. The Greater Bay Region fosters different market specializations; Hong Kong is the financial center, Shenzhen is China's 'Silicon Valley' due to its innovation and start-up culture, Guangzhou is home to a well-developed manufacturing and logistics industry, and

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Policy type:	National cluster policy	National cluster policy	Regional cluster policy (example of the Guangdong-Hong Kong-Macao Greater Bay Area)
Policy name:	TORCH Program	Cluster Cities	Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area
	of Productivity Promotion Centers which offer incubation and business support services to start-ups. Cluster innovation is driven by the collaboration between the industry and R&D institutions (universities).	to lower them in smaller cities nearby to encourage a spread of people and workers across regions/agglomerations. China plans to make the three priority clusters - the Pearl River Delta/Greater Bay Area, the Yangtze River Delta, and the Beijing-Tianjin-Hebei region - world-leading clusters by 2020. The City Clusters policy is based on the idea that urban residents with higher incomes consume more than rural residents, boosting the economy, and that clusters increase the size of the labour market and foster productivity and innovation.	Macao and Zhuhai are designed to be popular tourism destinations. As part of the regional clusters policy, free trade is fostered, which is why China aims to make the Guangdong Free Trade Zone open to international investment and global supply chains within the region. The regional cluster policy also promotes the expansion of infrastructure, R&D innovation, regional cooperation, and integration, as well as social and economic opportunities for national and international citizens. The Greater Bay Area accounted for 12%, or USD 1.38 trillion, of China's economy in 2016, while it is home to only 5% of China's population. Although the Yangtze River Delta cluster is bigger regarding its economic size (accounting for about 20% of national GDP), the Greater Bay Area cluster is remarkable because of its ambition to transform nine mainland cities and two special administrative regions into a new Silicon Valley-type technology and innovation hub with the regional cluster development plan. Furthermore, Guangdong Province is a vital economic

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			location as it accounted for 23.5% of China's total trade in 2018. This cluster development plan aims to make the region a world-class cluster, rivalling Tokyo, New York, or San Francisco.
POLICY FOCUS	**Cross-sectoral**	**Cross-sectoral**	**Cross-sectoral**
	While the TORCH Programme is based in high-tech innovation, it covers a wide range of sectors, such as biomedicine, next generation information industries, marine technology, intelligent application of spatial information networks, advanced materials, energy storage and distribution, and new-energy vehicles.	The City Clusters policy aims to create clusters with regional specialization, covering a wide range of sectors, such as high-technology products, electronic goods, textile manufacturing, toys, or plastic products.	Within the Guangdong-Hong Kong-Macao Greater Bay Area, China aims to not only spur regional specialization but also cross-sectoral cooperation, combining for instance sustainable energy, technology, and infrastructure.
RESPONSIBLE AUTHORITIES	**Both drafting and implementation** **Provides funding** **Oversees the implementation**	**Both drafting and implementation** **Provides funding** **Oversees the implementation**	**Both drafting and implementation** **Oversees the implementation**
	The TORCH Programme is planned and implemented by the Torch High Technology Industry Development	The overall policy objective was initiated by the central government of China, however, the administration and financing of cluster	The national ministries are responsible for the development of the policy plan, whereas the regional governments

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Policy type:	National cluster policy	National cluster policy	Regional cluster policy (example of the Guangdong-Hong Kong-Macao Greater Bay Area)
Policy name:	TORCH Program	Cluster Cities	Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area
	Center (also Torch Center) under the guidance of the Ministry of Science and Technology (MoST). The national government approved this cluster development programme in 1988. It is based on centralized programme objectives with local implementation experiments.	projects within clusters is largely the responsibility of local and municipal authorities. Large, cross-cluster infrastructure projects (railways, airports, roads, logistics, etc.) are also overseen by the central government.	(Government of Guangdong Province and the Governments of Hong Kong and Macao SARs) oversee the implementation of the policy objectives.
BENEFICIARIES	**SMEs** **Research organisations** **Academic institutions** **Start-ups** **Business associations** **Large firms** **Technology centers** **General population**	**SMEs** **Research organisations** **Academic institutions** **Start-ups** **Business associations** **Large firms** **Technology centers** **General population**	**SMEs** **Research organisations** **Academic institutions** **Start-ups** **Business associations** **Large firms** **Technology centers** **General population**
	The TORCH Programme largely focuses on start-ups, research, and academic institutions, as well as SMEs and large enterprises in the technology business. The aim of the programme is to create a strategic	The City Clusters policy aims at strategic national economic development by strengthening business innovation and providing social opportunities (employment and labour market integration, pension, higher education,	This cluster policy aims to increase the economic development and competitiveness of start-ups, SMEs, as well as large firms. Additionally, the policy integrates academic and other research

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Policy type:	National cluster policy	National cluster policy	Regional cluster policy (example of the Guangdong-Hong Kong-Macao Greater Bay Area)
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	national and local network of high-tech zones and innovation parks.	technical training, health services, transferability of social insurance).	institutions to enhance regional innovation.

| INSTRUMENTS | Financial | **Funding collaboration initiatives**

Support to R&D projects, SMEs becoming cluster members, etc.

Subsidies for cluster infrastructure (e.g. offices, equipment)

Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)

Financing start-ups

Innovation: voucher, support to hire PhDs, cooperation with R&I actors | **Support to R&D projects, SMEs becoming cluster members, etc.** | **Support to R&D projects, SMEs becoming cluster members, etc.**

Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects) |
| | Technical assistance | **Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centers, technology parks etc.**

Support for hard skill development: knowledge transfer, intellectual | **Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centers, technology parks etc.**

Others:

regional economic specialization

labour market integration | **Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centers, technology parks etc.**

Support for networking and partnership building (at national and/or international level) |

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Policy type:		National cluster policy	National cluster policy	Regional cluster policy (example of the Guangdong-Hong Kong-Macao Greater Bay Area)
Policy name:		TORCH Program	Cluster Cities	Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area
		property, entrepreneurship, export advice, market intelligence **Support for soft skills development: coaching, management training, upskilling/reskilling** **Others: Productivity Promotion Centers provide hiring services to start-ups. The sources do not specify whether this refers to subsidies or non-financial services.**	**infrastructure development and integration (mainly transport and commuting opportunities)** **protection of green open spaces** **protection of farmland and natural resources**	**Others:** **labour market integration and social benefits** **improved financial market access** **infrastructure development and integration (transport and commuting opportunities)** **protection of natural resources and smart land use**
	Explanation	The TORCH Programme comprises various development support services. These include support for R&D design and technology transfer, entrepreneurship support in technology fields, industry promotion, talent training, technology finance, technology business incubators which provide start-ups with office space, free rent, access to university technology transfer, among others. The programme also gives access to Productivity Promotion Centers that offer consulting, promotion, product	The City Clusters policy mainly focuses on creating supercities that boost innovation, national economic growth, and market specialization. This in turn enhances employment opportunities, social benefits for citizens, and consumer spending.	As part of the national City Clusters policy, the Greater Bay Area cluster policy mainly focuses on creating a supercity that boosts innovation, national and regional economic growth, and market specialization to enhance global competitiveness. This in turn enhances employment opportunities, social benefits for citizens, and consumer spending.

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Policy type:	National cluster policy	National cluster policy	Regional cluster policy (example of the Guangdong-Hong Kong-Macao Greater Bay Area)
Policy name:	TORCH Program	Cluster Cities	Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area
	testing, hiring, training and incubation services to start-ups. Funding from the central government is limited, most of the funding stems from enterprises and banks. Local governments are largely responsible for the administration of high-technology zones.		

HISTORY	Period	Unlimited period	Limited period	Limited period
	Ending year *(for policies with limited period)*	-	2035	2035
	Starting year	1988	2006	2019
	Explanation	The sources do not indicate any end date. In view of the type of programme, it is more likely that it is unlimited/undetermined.	The City Clusters policy concept was first mentioned by the national government in 2006, yet it was only ten years later in 2016 when it was fully formulated into a national strategy. While the City Clusters policy is	The Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area published in February 2019 states that the plan covers "the period from now to 2022 in the immediate term and extends to 2035 in the long term." This regional cluster policy emerged from the

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Policy type:			National cluster policy	National cluster policy	Regional cluster policy (example of the Guangdong-Hong Kong-Macao Greater Bay Area)
Policy name:			TORCH Program	Cluster Cities	Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area
				planned until 2035, it may continue even after this period.	larger national City Clusters policy and thus follows its timeframe until 2035.
BUDGET		Overall	Innofund: Approximately EUR 890,000,000[2] between 1999 and 2013. Venture guiding fund: budget not indicated.	Not indicated in the sources	Not indicated in the sources
		Annual	Not indicated in the sources	Not indicated in the sources	Not indicated in the sources
		Source of funding	Enterprise dominated	Mostly local and municipal administrations	Mostly the regional governments of Guangdong, Hong Kong, and Macao, with support from the national government since the cluster policy is derived from the national City Clusters policy
POLICY EVALUATION		Availability	**in-itinere**	**no policy evaluation**	**in-itinere**
		Results	There is no evidence suggesting that there have been any evaluations conducted.	There is no evidence suggesting that there have been any evaluations conducted. Policy evaluation likely depends on regional governments and their cooperation with national authorities.	The National Development and Reform Commission and relevant ministries, including the Hong Kong and Macao Affairs Office of the State Council, monitor, evaluate, and finetune the progress of the implementation of the policy plan. No

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[2] Indicated in USD in the source and converted into EUR at ECB exchange rate from 25-06-2020.

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			interim evaluation results are mentioned in the sources.
POLICY ALIGNMENT WITH THE EU PRIORITIES	**Green economy** **Digitalisation**	**Digitalisation** **Resilience**	**Green economy**

Source: ECCP (2023).

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03

State of cluster policy

3. State of cluster policy

This section presents an overview on the state of play of Chinese 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 Chinese cluster policy** for 2023.

Table 2: State of play

CHINA	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 China, which is complementary to the maturity assessment presented above.

Policy scope

China is investing a lot of resources into research and innovation, cooperation with academic and R&D institutions, and regional infrastructure and social benefits. However, China's concept of industrial clusters may differ from the European concept of clusters, which relies on cluster organisations. Based on conclusions drawn from the sources, China does not focus so much on cluster organisations, but statistical clusters, viewing clusters as conglomerations of different actors that are supported by R&D

and infrastructure development efforts. The Chinese national cluster policy is implemented on the national level through two different cluster programmes.

With the TORCH Programme, the Chinese government aims at establishing innovation clusters through the creation of national science and technology industrial parks, software parks and productivity promotion centres.

The second national Chinese cluster policy, the City Clusters policy, aims at increasing its efforts to enhance its economic competitiveness globally by building 19 supercity clusters, three of which are prioritized and have a cluster agenda that boosts regional development, integration, and cooperation. The three priority regions of the national City Clusters policy are the Pearl River Delta/Greater Bay Area, the Yangtze River Delta, and the Beijing-Tianjin-Hebei region. The Guangdong-Hong Kong-Macao Greater Bay Area cluster policy was selected as a representative regional example since the policy is clearly outlined in a publicly available, comprehensive development plan on how the regional authorities of the Greater Bay Area aim to stimulate the growth of this cluster[3]. Moreover, the plan was published in 2019 and therefore reflects the recent status of one of China's central regional cluster policies.

Continuity

China has two long-term, ongoing national cluster policies. One of these national cluster policies, the Torch Programme, has existed since 1988. Ever since, the State Council and the Ministry of Science and Technology have established numerous high-tech industrial development zones, Science and Technology Industrial Parks, Software Parks, and Productivity Promotion Centers, spurring research, development, and innovation in the country.

While the City Clusters policy was established much later - first mentioned in 2006 and then fully formulated in 2016 - it is another long-term policy that highlights China's focus on cluster continuity to boost national economic and social development.

Evidence of performance

At the moment, the sources do not indicate a policy evaluation or monitoring for national cluster policies in China.

Cluster support instruments

The Chinese Clusters are offered different financial and technical support instruments on a national level. As part of the financial support instruments related to clusters, the Chinese government provides help, e.g., by financing start-ups and collaboration initiatives and by supporting market entries or R&D Projects. Regarding technical support, the Chinese Government also provides infrastructure such as coworking spaces, offices, incubation and accelerator spaces, research centres and technology parks. In addition, there is support in developing several hard and soft skills. Summarised, the Chinese Government offers extensive support, financial as well as technical.

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[3] See China's Constitutional and Mainland Affairs Bureau (2019) in the bibliography.

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Annex

Table 3: 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).