

# Presentation of the Input Paper

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# Economic profile of North Brabant

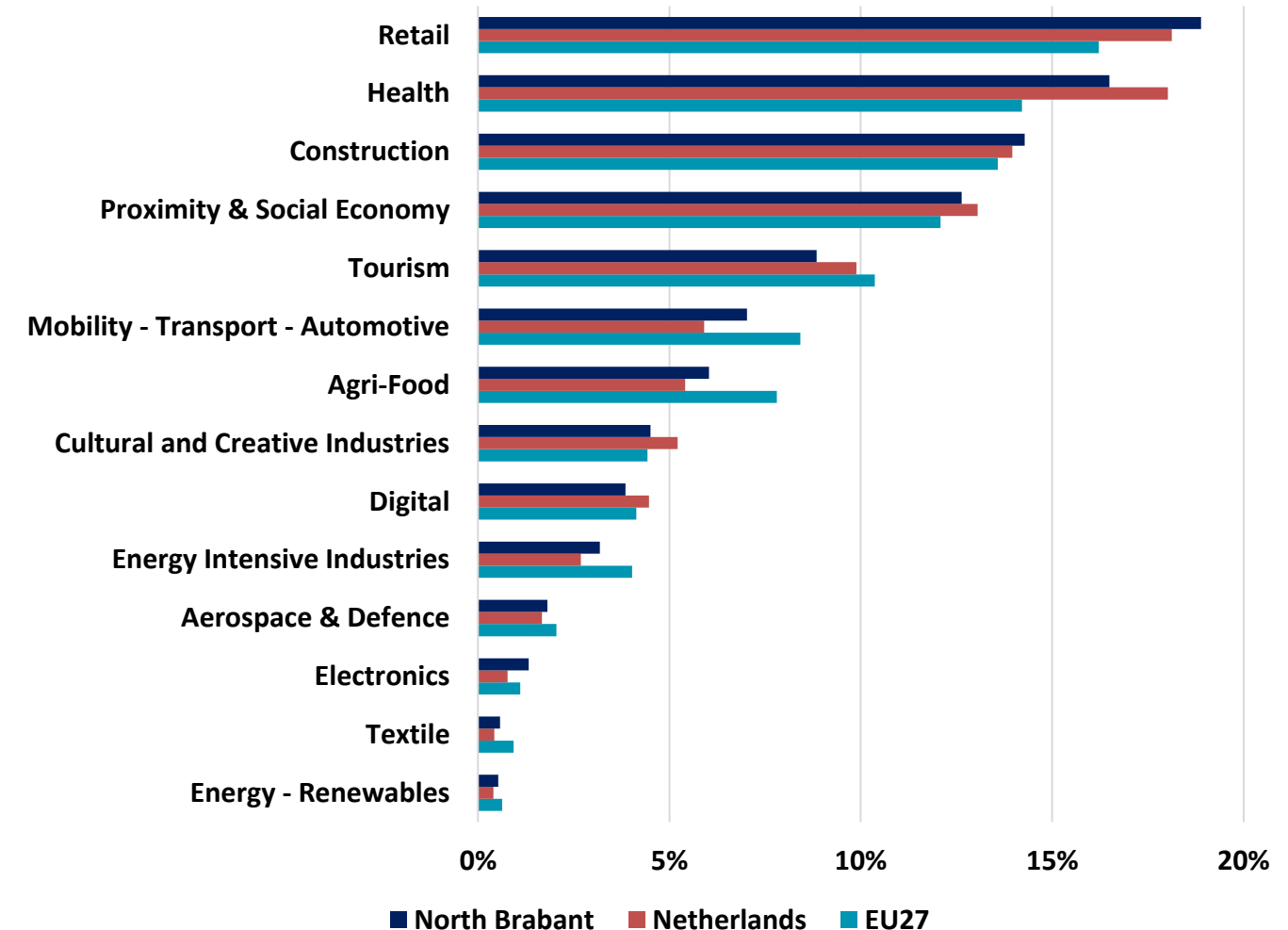
## General trends in the regional economy:

- The region of North Brabant exhibited a **GDP of €161.9 billion**, and a **GDP per capita (PPS) of €52,200** (EU avg. €38,100)
- North Brabant's **exports totalled €166.4 billion in 2022**, with **“Machinery and transport equipment”** being the most exported good
- The region excels in **advanced manufacturing, photonics, semiconductors**, and **robotics**, supporting the development of key enabling technologies

## Employment composition:

- **Retail, Health and Construction**, stand out as key industrial ecosystems
- The **Mobility-Transport-Automotive, Agri-Food, Energy Intensive Industries, Electronics and Energy – Renewable** ecosystems all have employment shares above the national average

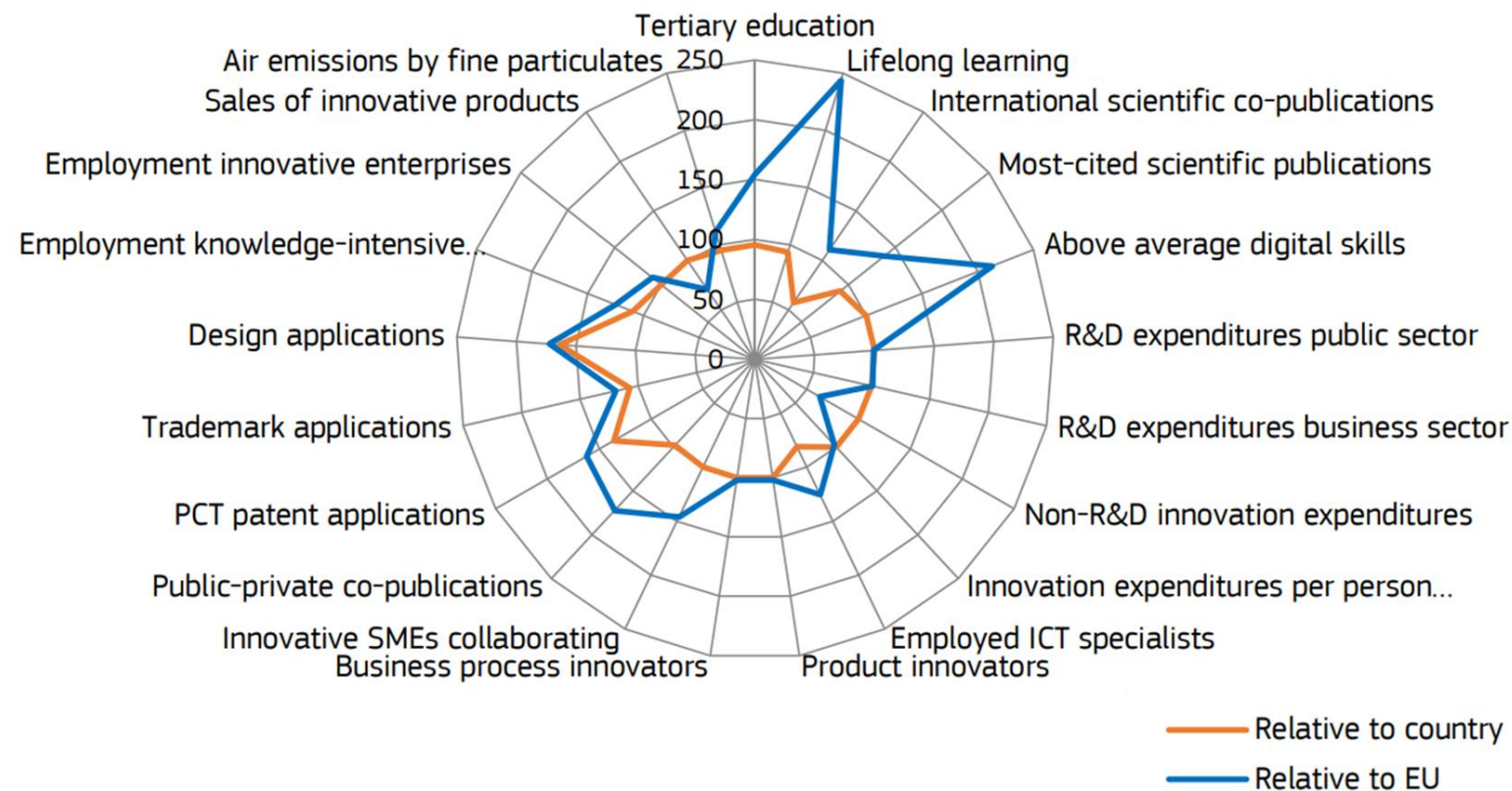
## Employment shares across the Industrial Ecosystems





# Regional innovation & competitiveness performance

## RIS 2023: North Brabant (NL41) as an “Innovation Leader”



Source: European Commission (2023): Regional Innovation Scoreboard 2023 – Regional profiles Netherlands.

### Relative Strengths according to the RIS 2023

1. PCT patent applications (relative to EU & NL)
2. Design applications (relative to EU & NL)
3. Trademark applications (relative to EU & NL)

### Areas for improvement

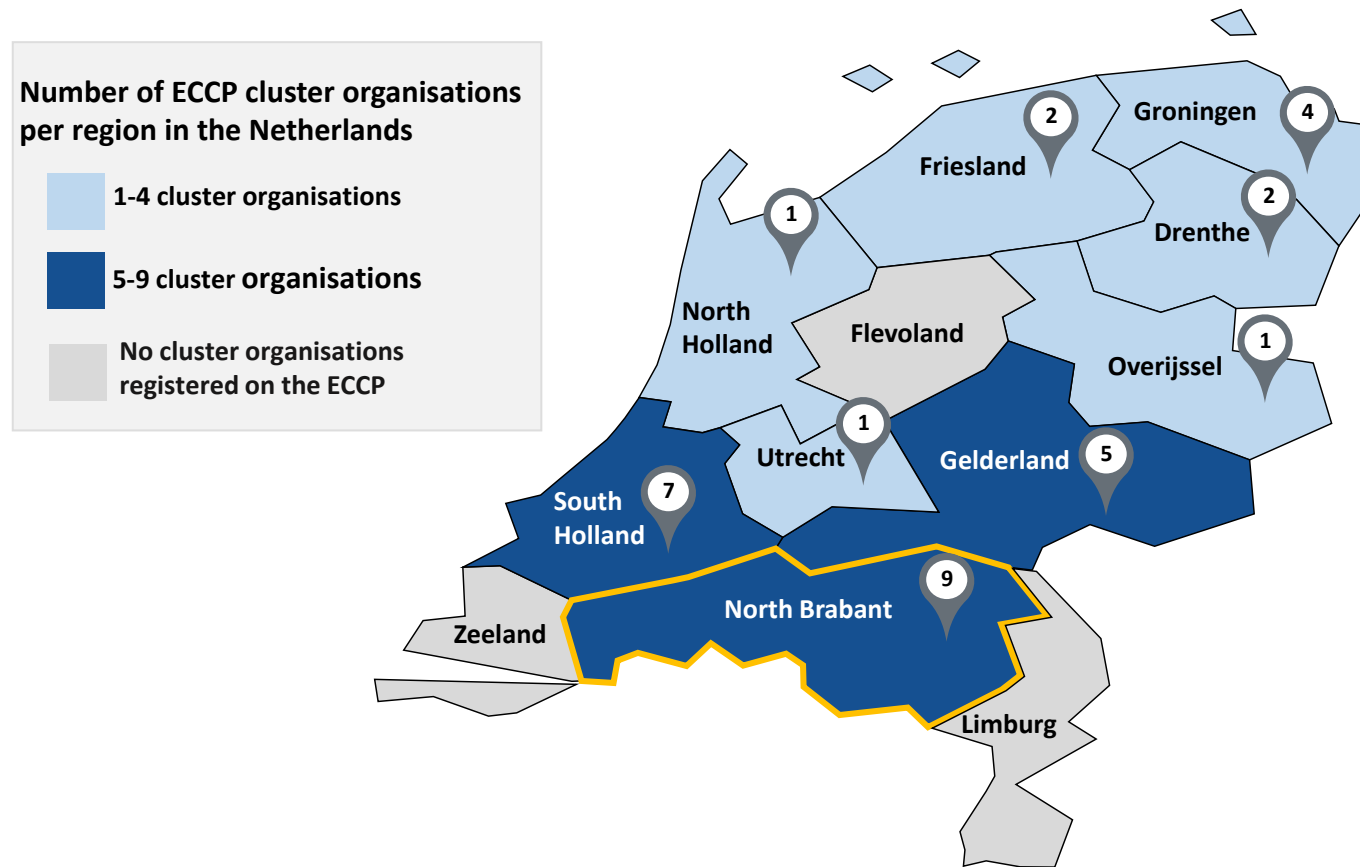
1. International scientific co-publications (relative NL)
2. Non-R&D innovation expenditures (relative to EU)
3. Sales of innovative products (relative to EU)

### Regional Competitiveness Performance (RCI 2022)

- North Brabant is ranked 4<sup>th</sup> across all 234 assessed regions in the RCI making it one of the most competitive regions in the EU
- The province excels in the Innovation Sub-Index, driven by strong performances in pillars for technological readiness and innovation

# ECCP cluster ecosystem in North Brabant: Locations, industrial ecosystems and structures

## Cluster organisations registered on the ECCP in North Brabant and the Netherlands



Source: ECCP (2025). Own elaboration based on <https://reporting.clustercollaboration.eu/all>; last access 25.02.2025.

## 32 Dutch Cluster Organisations are registered on the ECCP

- North Brabant is the region with the **most cluster organisations (9)** with five of them located in **Eindhoven**
- COs spanning **7 out of EU industrial ecosystems**,
- **Top ecosystem: Health** with 3 Cos – two of them being active in the sports sector

## Structure of clusters

- **Many mid-sized and large COs** in terms of member structure: 66% have 100 or more members (EU: 38%)
- **Collaborative Areas:** Partnering for projects, internationalisation, exchanging with peers as well as technology scouting and digitalisation



# The policy framework to support cluster development

## National level



The Netherlands

### Topsectorenbeleid (top sectors policy)

- Since 2011
- Collaboration and funding platforms for leading sectors (Top Consortia)
- Horizontal elements: mission-driven approach; key enabling technologies
- Supported by leading “TO2” research institutions
- Tax instruments, funding streams, guarantees, consultancy services

## Regional level



Province  
North Brabant

### Smart Specialisation Strategy (S3)

- Focusing on sectoral transitions
- E.g., energy transition, health transition
- Linked to Vanguard Initiative to leverage S3 for interregional cooperation
- Implemented through Brabant Development Agency (BOM)





## Subregional level



- Four subregional development agencies
- Managing strategic partnerships and innovation programmes
- Offering various business services

# Clusters and regional economic competitiveness

Cluster organisations are **positively correlated** with a range of **economic competitiveness indicators**:

Business environment	Firm behaviour	Innovation potential	Economic returns
			
Birth of enterprises <span>++</span>	Business R&D investment <span>++</span>	PCT patents per capita <span>++</span>	GDP per capita <span>++</span>
Human resources in Science & Tech <span>++</span>			Apparent labour productivity <span>++</span>
			Employment rate <span>++</span>
			Employment in tech & knowledge sectors <span>++</span>

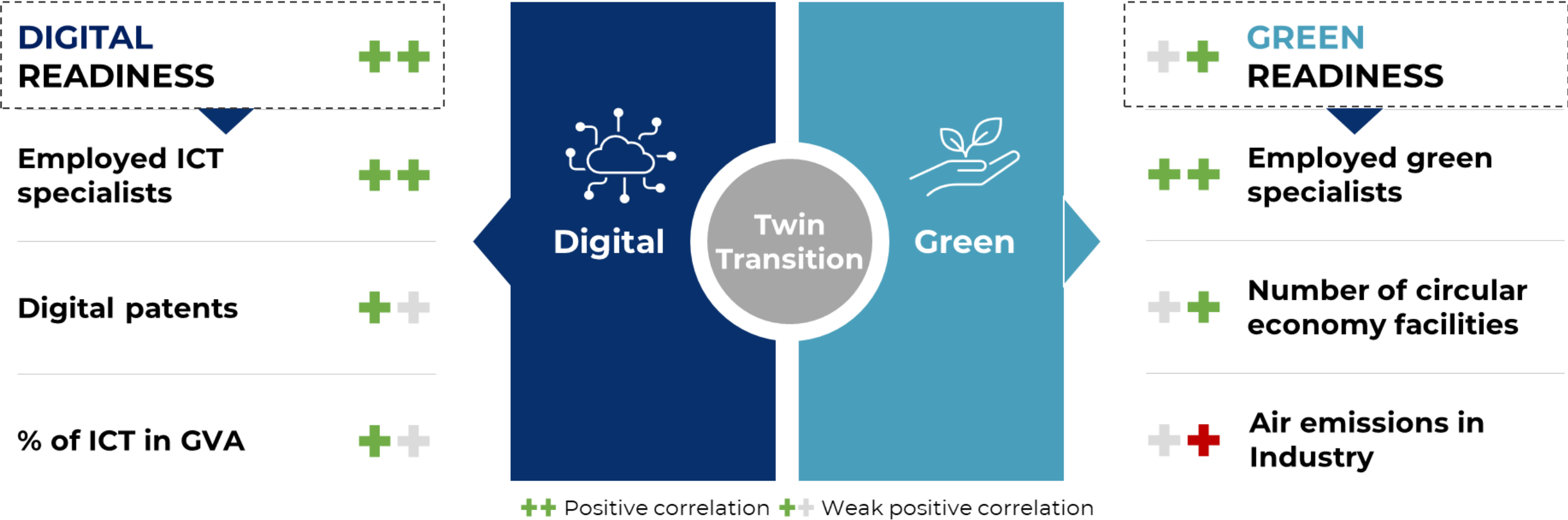
++ Positive correlation    ++ Weak positive correlation

Source: ECCP (2025). The symbols in the table indicate Pearson correlation coefficients that are significant at 95% level. Positive/negative Correlations include coefficients  $\geq 0.3$ , weak correlations include coefficients  $\geq 0.1$ .



# Clusters and the Twin Transition

Clusters are driving digital and green readiness:



Source: ECCP (2025). The symbols in the table indicate Pearson correlation coefficients that are significant at 95% level. Positive/negative Correlations include coefficients  $\geq 0.3$ , weak correlations include coefficients  $\geq 0.1$ . ^Green fields indicate a positive relationship and red a negative relationship

# EU offers important programmes for collaborative projects among clusters & their members



## ESCP-4i

- COSME initiative
- Development and implementation of joint internationalisation strategies to support SME internationalisation
- **Three clusters from North Brabant involved in three ESCP-4i projects**



## ESCP-4x

- COSME initiative
- Boost the cross-cluster networking and learning within the EU and development of cluster management excellence
- **Two clusters from North Brabant are involved in two different ESCP-4x projects**



## Euroclusters

- Single Market Programme
- Support the implementation of the EC industrial strategy through cross-sectoral, interdisciplinary and trans-European cluster initiatives
- **Three clusters from North Brabant are participating in three Euroclusters.**



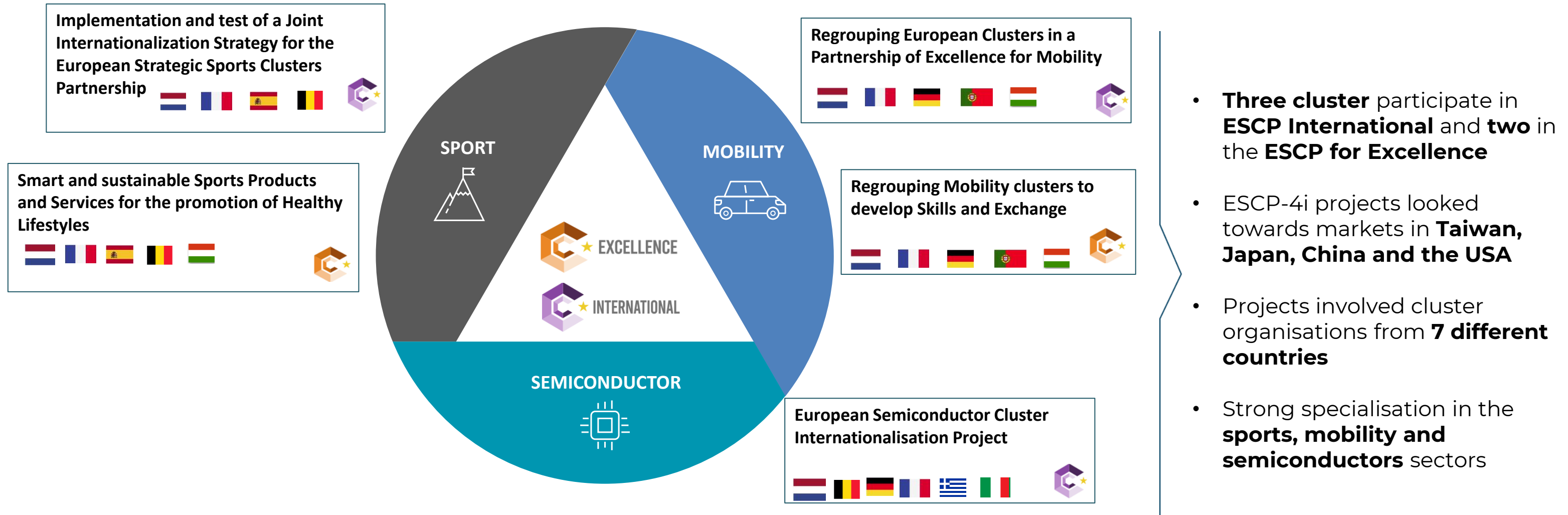
## I3

- Funding instrument under the European Regional Development Fund (ERDF) 2021-2027 programming period that provides advisory and financial support
- **24 beneficiaries from North Brabant of which two are clusters, participate in 9 different I3 projects.**

Source: ECCP (2025).



# Cross-border cooperation and involvement of North Brabant in European partnerships



Source: ECCP (2025).

# Involvement in the Euroclusters

## E-BOOST



- Automotive Industry NL
- Aims to accelerate green and digital transition, setting focus on electricity and green hydrogen.

## Silicon Eurocluster

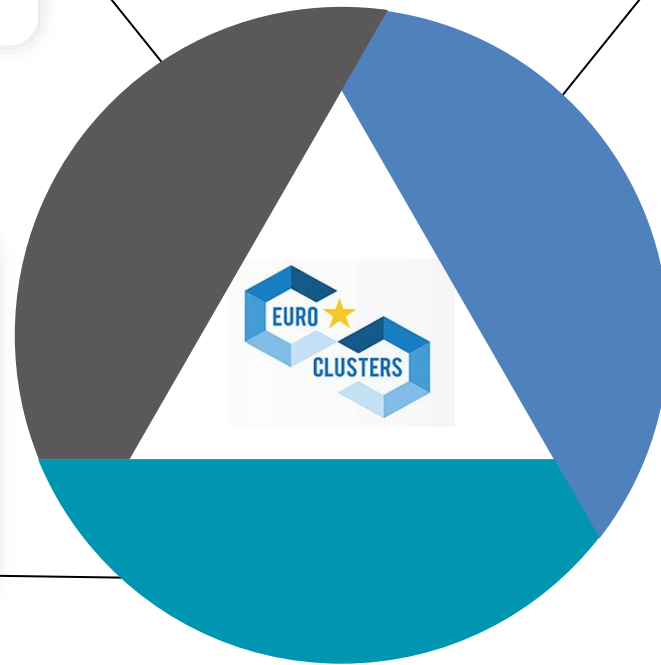


- High-tech NL
- Achieve greater European self-sufficiency, competitiveness and resilience in electronics value chain.

## BioMan4R2



- Lifeteczone
- Health focused aiming at scaling up innovation in the health sector, adapting the funding system and supporting collaboration of different EU-levels with SMEs, investors, etc.



- **3 participations** in Euroclusters by three North Brabant cluster organisations
- Projects involved EU cluster partners from **11 different countries**
- Thematic focus areas:
  - **Health**
  - **Green transition**
  - **Digital transition**
  - **Technology**

Source: ECCP (2025).



# Smart Specialisation Strategy of North Brabant and the role of clusters

## Smart Specialisation Strategy of North Brabant

### Priority areas of the S3 2021-2027 of North Brabant

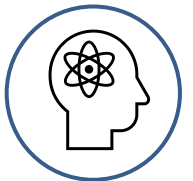


1. Energy transition
2. Raw materials transition
3. Climate Transition
4. Agriculture and food transition
5. Health transition

- The North Brabant Smart Specialisation Strategy identifies **5 priority areas**
- North Brabant's **cluster organisations are key** both for the **development and implementation** of North Brabant's S3 2021-2027
- **Workforce upskilling** will come from the collaboration between universities, vocational institutions and businesses
- Crucial role of the **dynamic cluster ecosystem** in positioning North Brabant as one of Europe's most innovative regions supporting S3 implementation

Source: ECCP (2025).

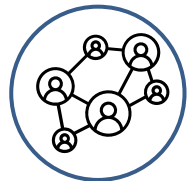
# Final Remarks



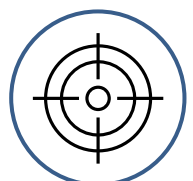
North Brabant is an **Innovation Leader**, which is reflected in the creation of intellectual, research collaboration and a high skilled work force



The **cluster landscape in North Brabant** is defined by nine cluster organisations, with particular strengths found in the industrial ecosystems Electronics and Health

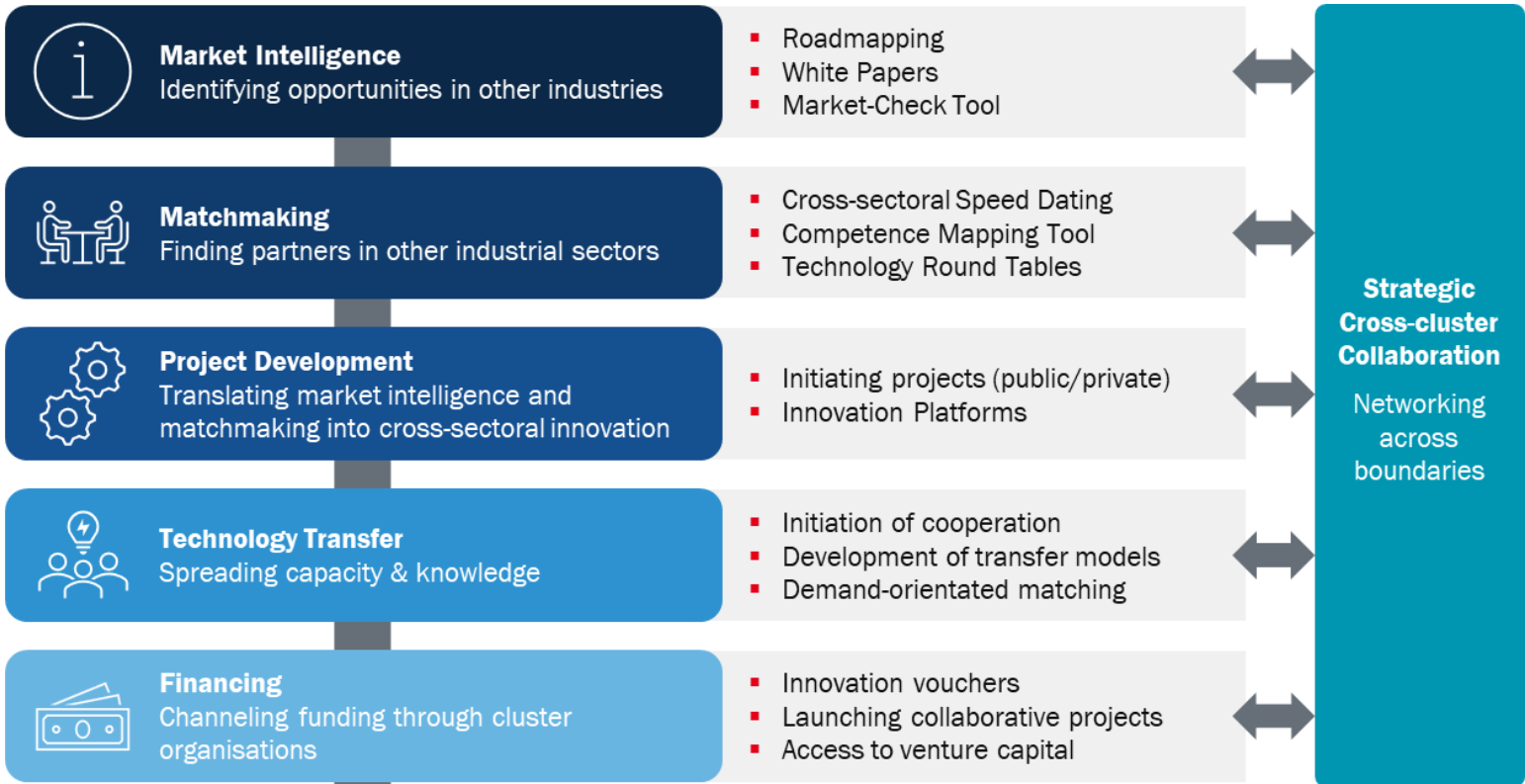


Several cluster organisations participate in various **inter-regional collaboration initiatives** to support entrepreneurship



The North Brabant S3 2021-2027 identifies **5 priority areas**. North Brabant clusters play a key role in the development & implementation of the strategy

## Role of cluster organisations in the innovation ecosystem

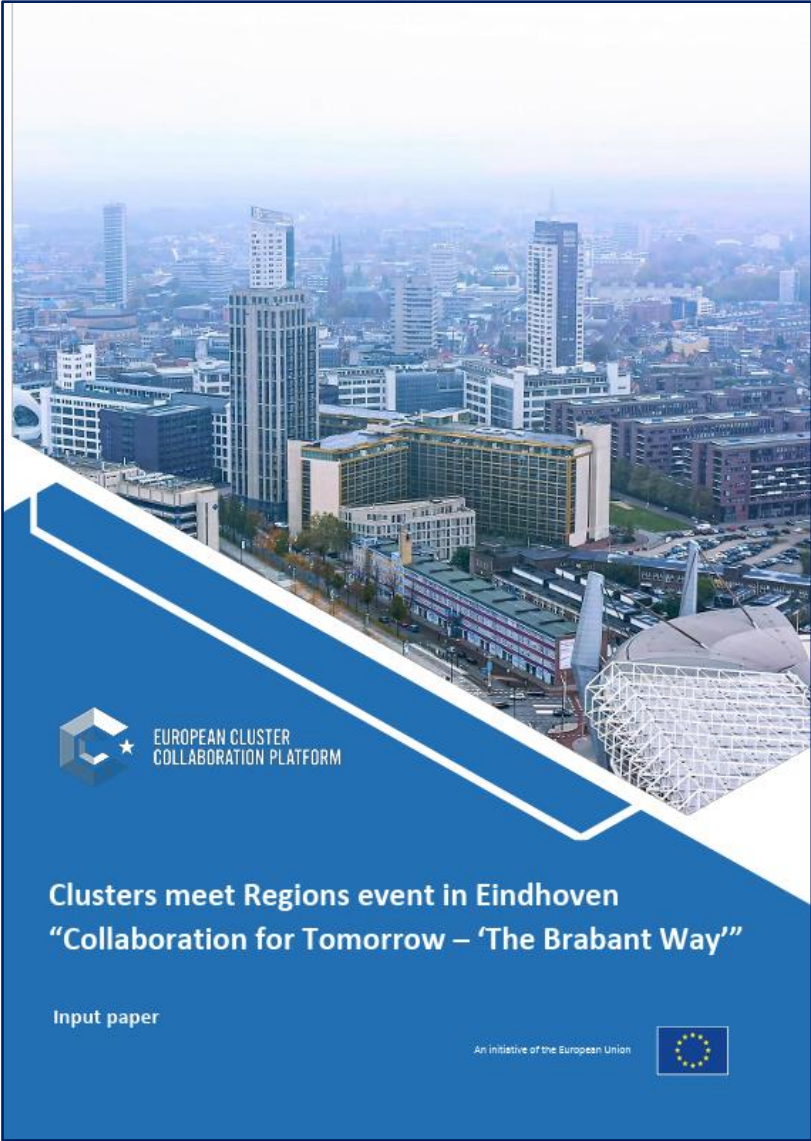


**Facilitation of value chain transformation (Twin Transition), innovation & greater resilience**

Source: ECCP (2025), based on European Cluster Observatory (2014): Cluster Collaboration and Business Support Tools to Facilitate Entrepreneurship, Cross-sectoral Collaboration and Growth



# Make sure to check out the Input Paper!



Source: ECCP (2025).