

Presentation of the Input Paper

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Economic profile of the Podkarpackie region

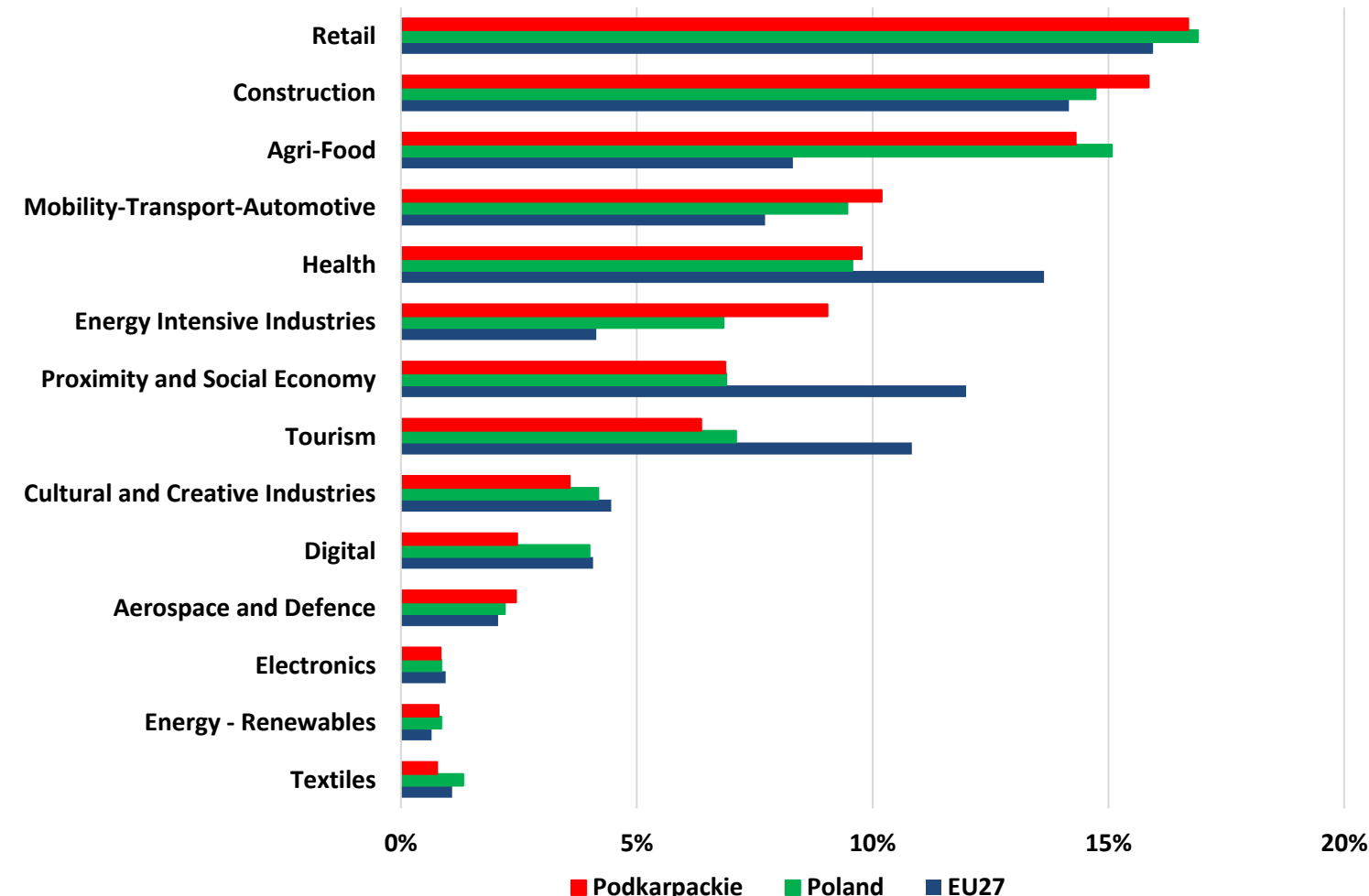
General trends in the regional economy

- The Podkarpackie region exhibited a **GDP of €28.4 billion** in 2023 and a **GDP per capita (PPS) of €21,100** (EU27 avg. €38,100)
- Region has a strong manufacturing sector and is highly industrialised, with the **GVA** share of manufacturing being 27% (EU27 avg. 16.6%)
- Particular strengths in aerospace, electromechanical, automotive, IT, and chemical industries

Employment composition

- The importance of the **industry** is reflected in its employment share of **Mobility-Transport-Automotive**, **Energy Intensive Industries** and **Aerospace and Defense**, all of which exceed the national and EU averages
- **Retail** and **Construction** are the biggest ecosystems in terms of employment, but only Construction surpasses the national and EU average

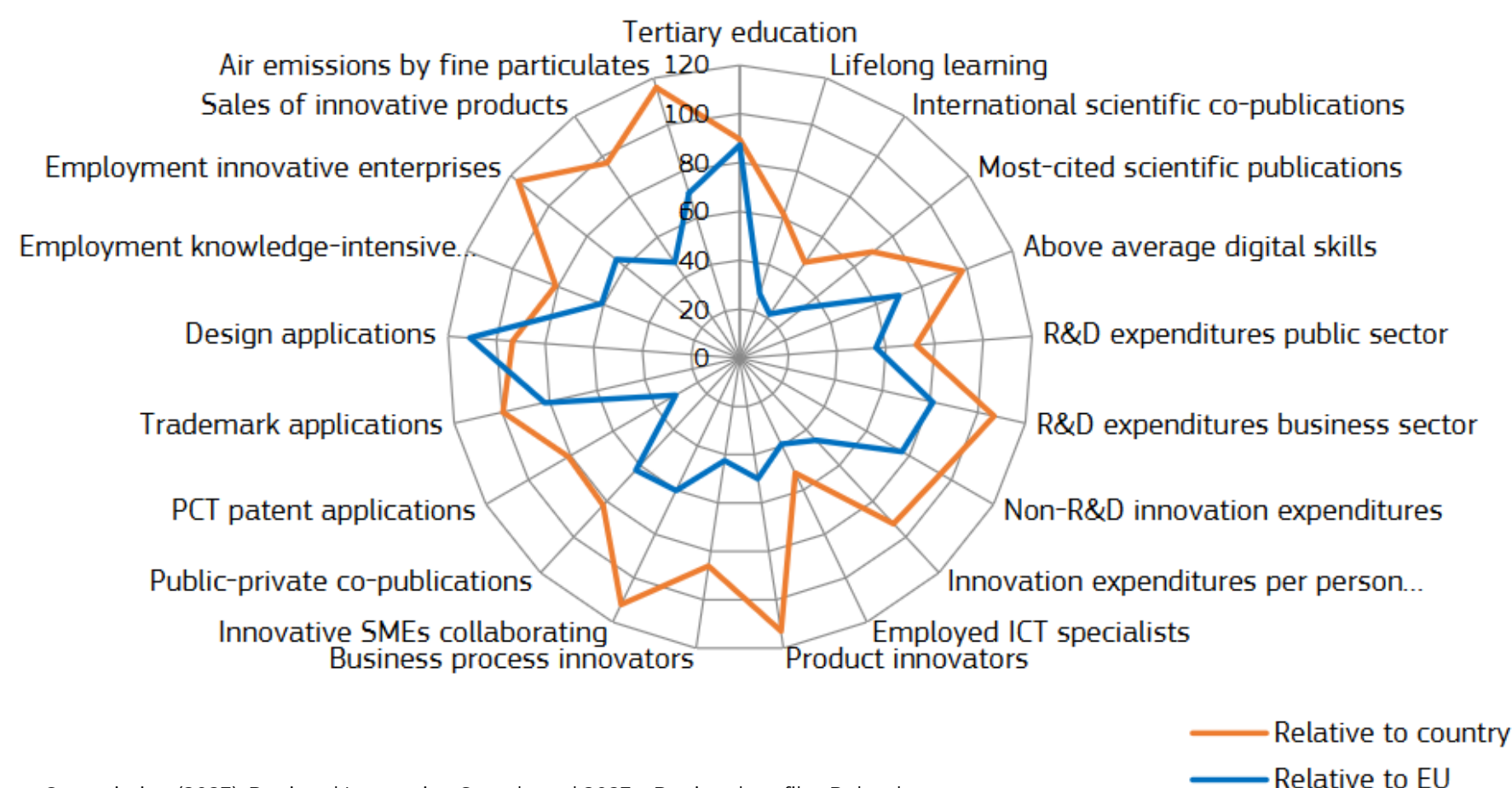
Employment across the industrial ecosystems



Source: ECCP (2025), own elaboration based on Eurostat data for 2022..

Regional innovation and competitiveness performance

**RIS 2023: Podkarpackie (PL82) is classified as a
“Emerging Innovator”**



Relative Strengths according to the RIS 2023

1. Design applications (relative to EU)
2. Product innovators (relative to PL)
3. Employment innovative enterprises (relative to PL)

Areas for improvement

1. International scientific co-publications (relative to PL & EU)
2. Lifelong learning (relative to PL & EU)
3. PCT patent applications (relative to PL & EU)

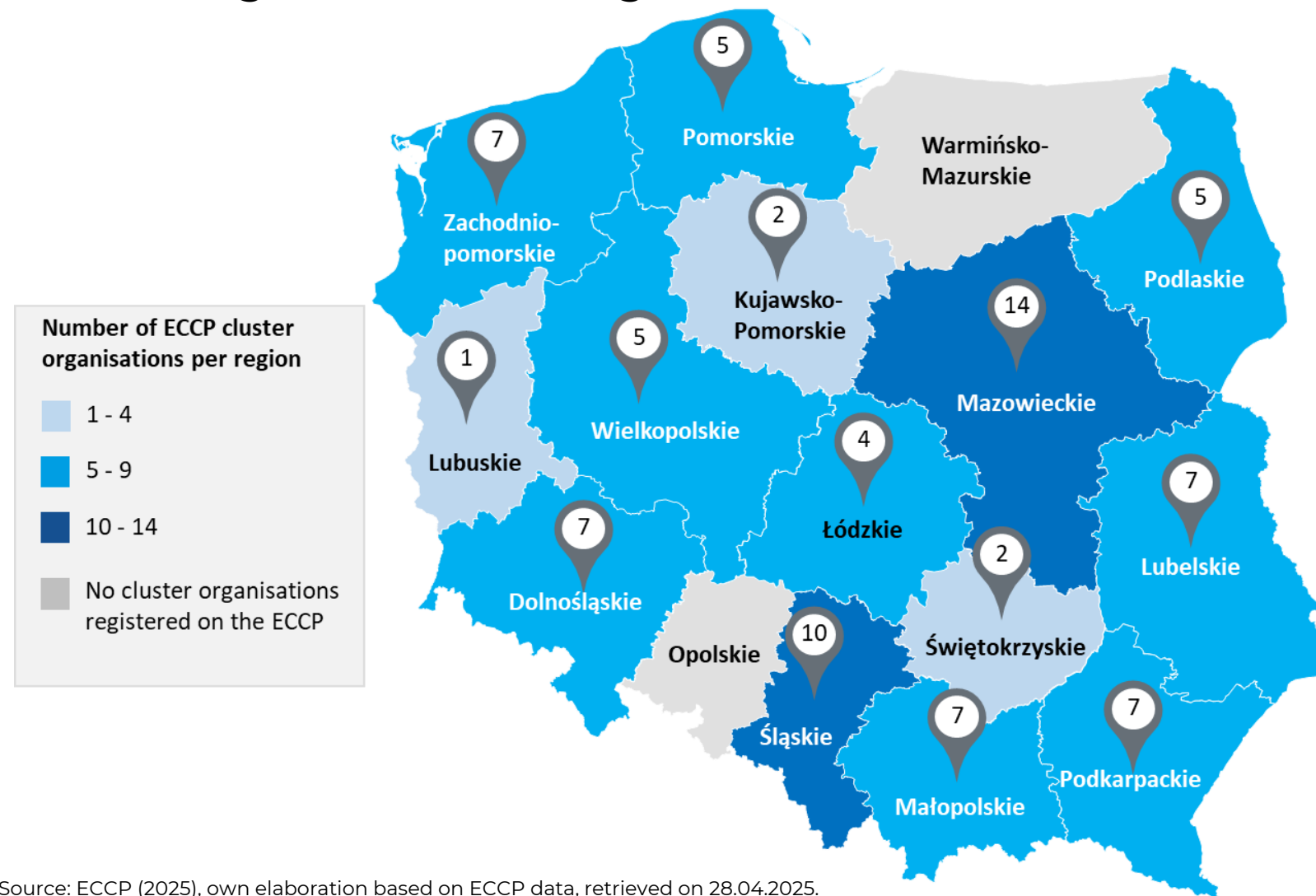
Regional Competitiveness Performance (RCI 2022)

- Commendable performance in the Basic Sub-Index, driven by strong results in basic education & good results in the field of macroeconomics
- Relatively weak performance in the Innovation Sub-Index, mainly due to the level of business sophistication

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

Cluster ecosystem in the Podkarpackie region

ECCP-registered cluster organisations in Poland



- In Podkarpackie region, there are **seven cluster organisations** out of a total of 83 clusters in Poland registered on the ECCP
- The **ECCP-registered cluster organisations in Podkarpackie** cover **six of the 14** EU industrial ecosystems, with a strong focus on industrial and production-oriented fields
- However: the ECCP registered cluster only reflects a part of the regional cluster ecosystem - there are 22 non-ECCP-registered clusters active in the region, resulting in a total of **29 cluster organisations in the Podkarpackie region**
- Clusters such as the Aviation Valley and the Polish Automotive Group highlight the strength of the **regional aviation and automotive ecosystem** while also aligning with the **S3**

Source: ECCP (2025), own elaboration based on ECCP data, retrieved on 28.04.2025.

Clusters and regional economic competitiveness

Correlation of cluster presence and key competitiveness indicators

Birth of enterprises



Human resources
in Science & Tech



PCT patents per capita



Business
environment



Firm
behaviour



Innovation
potential



Economic
returns

Business R&D invest



GDP per capita



Apparent labour
productivity



Employment rate



Employment in tech &
knowledge sectors



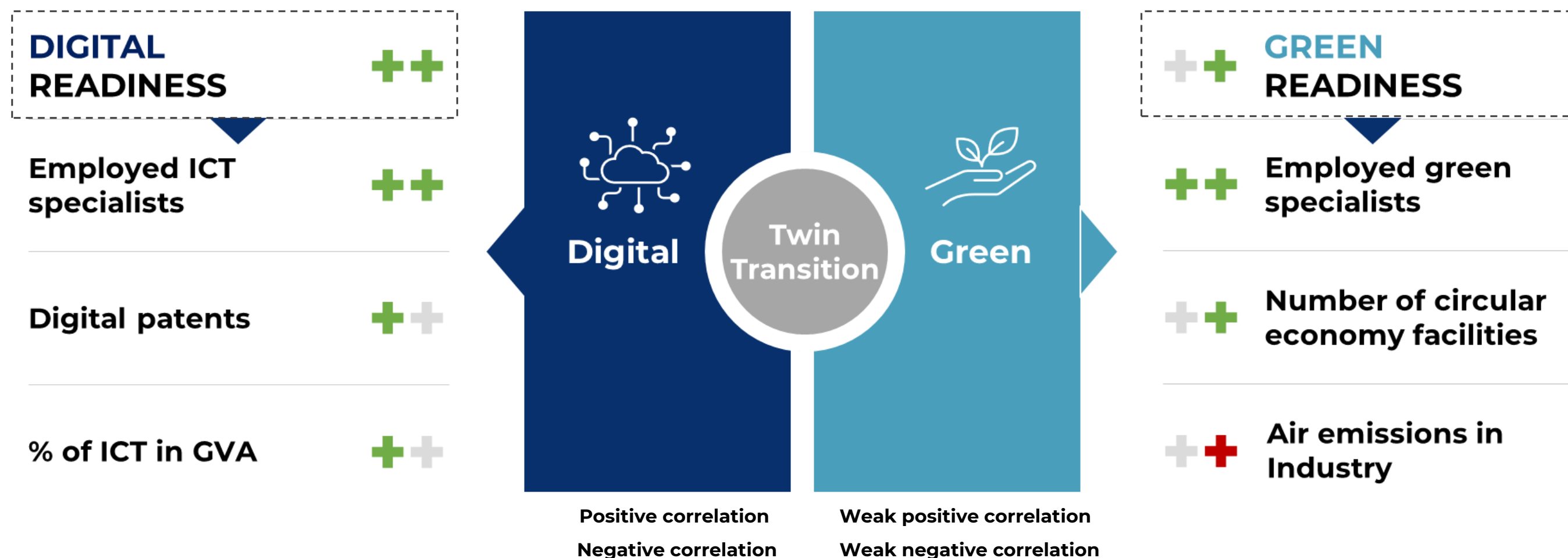
++ Positive correlation

+ Weak positive correlation

Source: ECCP (2024). The symbols in the table indicate Pearson correlation coefficients that are significant at 95% level. Positive/negative Correlations include coefficients ≥ 0.3 , weak correlations include coefficients ≥ 0.1 . Green fields indicate a positive relationship and red a negative relationship

Clusters in 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 ≥ 0.3 , weak correlations include coefficients ≥ 0.1 . Green fields indicate a positive relationship and red a negative relationship

Policy framework to support cluster development



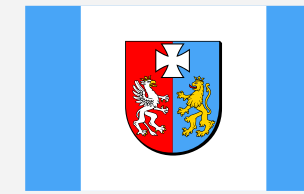
National Level

At the national level, three cluster categories are identified:

- **Emerging Clusters**
- **Developing/Regional Key Clusters**
- **National Key Clusters** (KKK)

KKK Programme is Poland's dedicated national-level cluster support programme:

- Main tool for national cluster policy
- Grants access to ERDF-related funding via European Funds for Modern Economy 2021–2027
- Supports cooperation in digitalisation, circular economy, innovation, education, and internationalisation



Regional Level

Key actors in the region's cluster include:

- **Rzeszów Regional Development Agency** (RARR)
- **Podkarpackie Innovation Centre** (PCI)
- **Podkarpackie Development Fund**

Infrastructure that further reinforces the regional innovation ecosystem:

- Podkarpackie Science and Technology Park AEROPOLIS
- Science-Technology Park Rzeszów–Dworzysko
- EURO-PARK Mielec Special Economic Zone further reinforce the regional innovation ecosystem

EU programmes for collaborative projects among clusters & their members

2014-2020 funding period



ESCP-4i

- COSME initiative
- Development and implementation of joint internationalisation strategies to support SME internationalisation
- **One clusters from the Podkarpackie region is involved in one ESCP-4i project (REC-N-COMP)**



ESCP-4x

- COSME initiative
- Boost the cross-cluster networking and learning within the EU and development of cluster management excellence
- **No cluster from the Podkarpackie region is involved in any ESCP-4x project**

2021-2027 funding period



Euroclusters

- Single Market Programme
- Support the implementation of the EC industrial strategy through cross-sectoral, interdisciplinary and trans-European cluster initiatives
- **One cluster organisation from the Podkarpackie region is part of one Euroclusters (METASTARS)**



I3

- Funding instrument under the European Regional Development Fund (ERDF) 2021-2027 programming period that provides advisory and financial support
- **One cluster from the Podkarpackie region is taking part in two I3 projects (METASTARS, EEN-SP)**

Podkarpackie clusters in interregional cluster partnerships

METASTARS (I3 + Eurocluster)



REC-N-COMP (ESCP-4i)



ENN-SP (I3)



European Automotive Cluster Network (EACN)




Automotive Skills Alliance



- Participation in **one ESCP 4i**, **one Eurocluster** and **two I3 projects**
- Two cluster organisations are involved in **other cluster partnerships and alliances**, supporting skills development & the green + digital transformation of the automotive sector
- **Projects involved European cluster partners** from 18 countries
- **Thematic focus:**
 - Aerospace and Defense
 - SMEs
 - Automotive industry

Smart Specialisation Strategy of Podkarpackie and the role of clusters



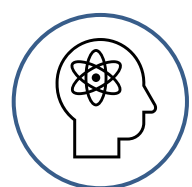
Priority areas of the Regional Innovation Strategy of the Podkarpackie Region for 2021-2030

1. Aviation and Cosmonautics
2. Automotive
3. Information and Telecommunication Technologies
4. Quality of Life

Source: ECCP (2025), own elaboration based on the Regional Innovation Strategy of the Podkarpackie Province for 2021-2030.

- The **Regional Innovation Strategy of the Podkarpackie Province 2021–2030** defines **four priority areas**, reflecting the region's focus on industrial competitiveness, research cooperation, and advanced technologies for socio-economic development
- Cluster organisations are key to **S3 implementation**, driving knowledge and technology transfer
- In alignment with its S3, the Podkarpackie region has launched strategic initiatives, such as the **Podkarpackie Innovation Centre (PCI)**, that support cluster initiatives to drive innovation, foster research-business collaboration, and boost regional competitiveness
- The S3 aims to enable Podkarpackie's rise as a **key innovation hub** in Eastern Europe

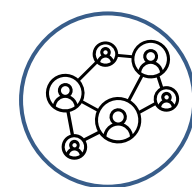
Final remarks



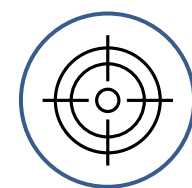
The region has a **strong industrial base** and, as an **Emerging Innovator**, shows strengths in design applications and product innovation, but room for improvement in scientific publications and patent applications.



The Podkarpackie region hosts **29 cluster organisations**, including 7 ECCP-registered, mainly focused on industry to boost innovation, competitiveness, and the twin transition.

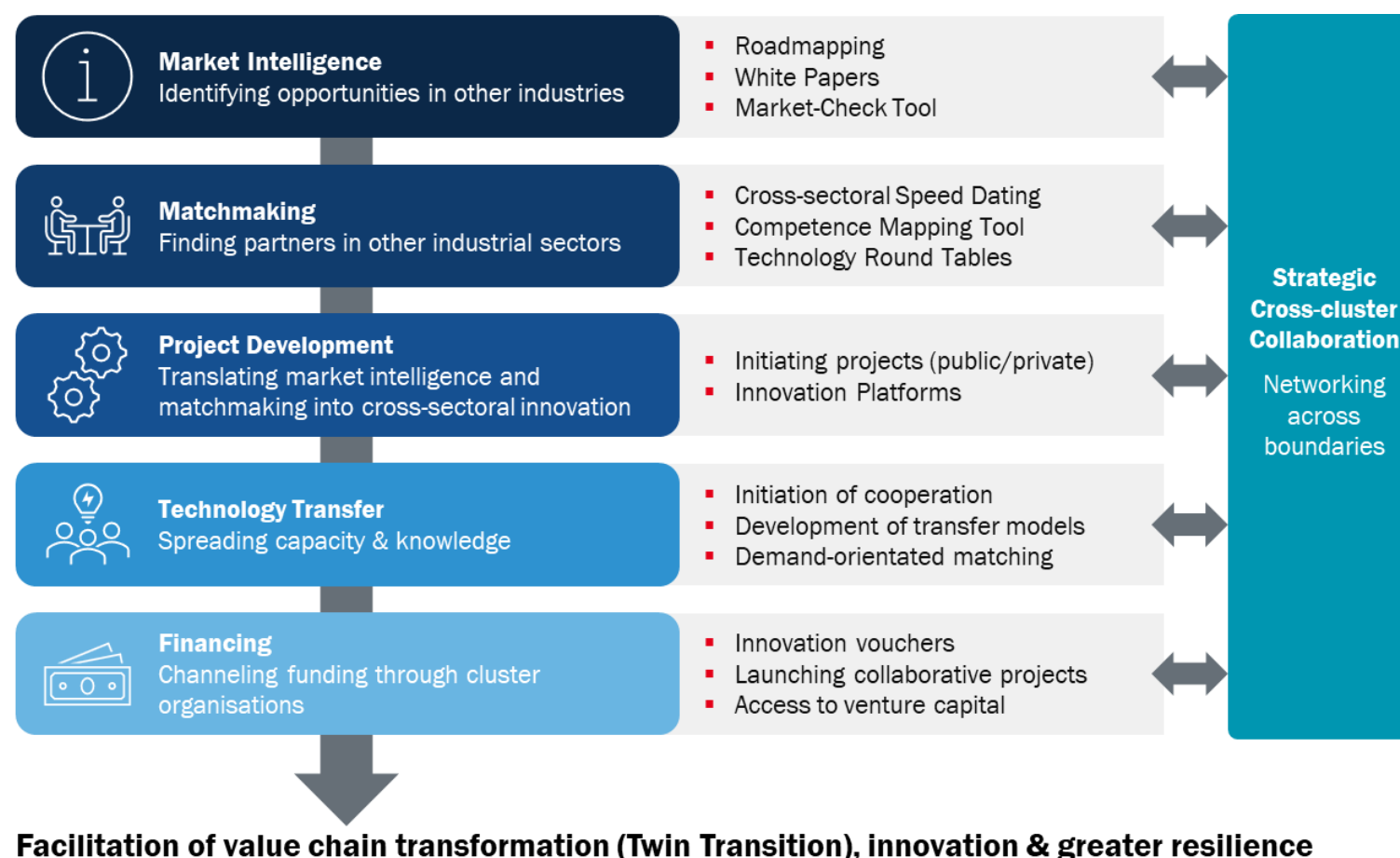


Cluster organisations in the Podkarpackie region actively engage in **interregional initiatives** like ESCP, Euroclusters, and I3, promoting collaboration and joint innovation.



The S3 strategy **outlines four priority areas**, with clusters playing a key role by **fostering collaboration** among academia, public authorities, and businesses

Role of cluster organisations in the innovation ecosystem



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 the input paper!

