

Cluster Policy in Greece

State of play and recommendations

More than fifteen years of public funding and no national cluster policy. Eight low-cost measures to turn project funding into a durable policy.

Hellenic Digital Health Cluster

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Purpose

Greece has invested in clusters for more than fifteen years, but it has yet to establish a coherent national cluster policy. Funding has been organised through successive, time-limited calls: when a programme ends, cluster organisations often lose their staff and capacity, and subsequent initiatives effectively start again from scratch.

This memo sets out the scale of the problem and proposes a limited number of practical, relatively low-cost measures that could transform fragmented project funding into a sustainable national cluster policy.

The landscape in numbers

- **Greece has 22 cluster organisations registered on the European Cluster Collaboration Platform (ECCP), and approximately 31 in total.** They are concentrated in only 7 of the 13 NUTS-2 regions (Attica 16, Central Macedonia 9, Eastern Macedonia–Thrace 2, Western Macedonia 1, Western Greece 1, Epirus 1, Crete 1). Six regions have no cluster organisation at all. By comparison, Spain has 213 organisations registered on the ECCP and Romania 73 (October 2026).
- **Greek clusters are comparatively research-led rather than industry-led.** SMEs account for 68.6% of cluster membership, compared with an EU average of 78.6%, while research organisations account for 17.2%, nearly twice the EU average of 9.6% and the highest share of any Member State.
- **The cluster landscape is poorly aligned with the structure of the Greek economy.** Registered organisations are concentrated in Digital (eight ECCP-registered organisations), Construction, Energy, Mobility-Transport-Automotive, Agri-food (three each), Aerospace & Defence, Electronics, and Health (two each). Yet the two largest employment sectors, Tourism (19%) and Retail (17%), have no cluster organisation at all.
- **Only two Greek clusters currently hold active ESCA quality labels.** The Hellenic Digital Health Cluster holds a Silver label and the Hellenic Biocluster holds a Bronze one.
- **Public funding has been substantial, but continuity has been lacking.** Several instruments operated during 2019–2023, representing roughly €110 million in public expenditure:
    - Innovation Clusters 1st call: €7.34 million, supporting 35 facilitators;
    - Innovation Clusters 2nd call: €34.68 million, supporting collaborative projects;
    - Competence Centres: €30 million, supporting 12 centres;
    - Value Chains–Clusters–Networking: €32 million; and
    - Attica regional programme: €6.6 million, supporting 11 projects.

  All these programmes ended in 2023. In the 2021–2027 Competitiveness Programme, clusters appear within the €3.9 billion programme only as an “indicative action”. GSRI announced a €25 million third Innovation Clusters call at the Thessaloniki Clusters Day in October 2025, but no call or pre-publication has followed, and no such call appears in the programme schedule through the end of 2026.
- **The ECCP's 2024 assessment highlights the underlying policy gap**. It identifies a Greek cluster policy, but one based exclusively on financial instruments, with no evaluation or monitoring framework and no technical-support measures. In the words of the factsheet, “*Greece's performance in clustering significantly falls behind the EU average*”.

Why funding has not produced a sustainable ecosystem

1. No common policy framework means no common definition — and no continuity

Greece has never established, in legislation or national policy, a common definition of a cluster organisation, a system for recognising clusters, or a framework setting out their role and entitlements.

Instead, individual calls have defined different entities: a "facilitator organization" in 2019; a consortium of at least ten companies in 2020; a Competence Centre company in 2020; and regional Research and Innovation Partnerships under programmes in Attica and Central Macedonia regions. As a result, institutional capacity and recognition do not accumulate from one funding cycle to the next.

Funding has followed the same pattern: three broad cycles — 2011–2015, 2019–2023 and potentially 2026 onwards — separated by gaps of three to four years, governed by different rules and with little connection between successive interventions.

Clusters are absent from the National Industrial Strategy, despite its 43 measures and €2.1 billion budget. RIS3 2021–2027 refers to clusters as both a criterion and an implementation tool but provides no dedicated budget line.

2. Projects were funded; sustainable cluster organisations were not

The second Innovation Clusters call allocated €34.68 million largely to projects undertaken by member companies, while the first call's €7.34 million supported 35 cluster facilitators for only 24 months, later extended to 36. As was acknowledged at the Thessaloniki Clusters Day in October 2025, many of the clusters created under successive programmes were not financially sustainable and were lost once the programme ended.

More mature European cluster programmes take a different approach: they provide predictable base funding for professional cluster-management teams over four to ten years, while gradually reducing public support and increasing private-income requirements. Denmark, Norway, France and the Basque Country provide relevant examples.

3. Financial support has not been complemented by institutional support

Greece has no national cluster registry, national quality framework, systematic cluster-manager training, national cluster association, or regular institutional dialogue between cluster organisations and the relevant ministries.

4. There has been no systematic evaluation

No evaluation of national cluster interventions has been undertaken since 2011. As a result, there is no objective assessment of how many of the approximately 57 funded clusters remain operational, what results they produced, or which interventions generated lasting value.

5. The institutional landscape is fragmented

Different public authorities continue to create parallel cooperation structures. GSRI (Innovation Clusters, Competence Centres), the General Secretariat for Industry (value chains), regions (ROPs), the Ministry of Digital Governance (EDIHs) each build their own cooperation structure — 12 Competence Centres, 7 EDIHs, Hellenic Chips Competence Centres, TTO networks — without connecting them to existing clusters in the same sector. The ECCP Input Paper for this event identifies the issue precisely: "*the main policy challenge is therefore not the creation of new innovation assets … the priority is to better connect existing organisations and support instruments*."

There is no systematic mechanism requiring these initiatives to connect with existing cluster organisations operating in the same sectors.

What Greece should do

Most of the measures below require limited or no additional expenditure.

1. Adopt a National Cluster Policy for 2027–2034.
A concise national policy should define what constitutes a cluster organisation, establish how clusters are recognised, specify how they can be supported and set out how their performance will be evaluated. It should be embedded in both RIS3 and the National Industrial Strategy, developed jointly with cluster organisations and informed by the ECCP Policy Toolkit.

2. Establish a national cluster registry.
Drawing on the Spanish AEI and Portuguese models, recognition should be based on transparent criteria: legal personality, at least 20 fee-paying members, dedicated staff, an adopted strategy and an active ECCP profile. Recognition should be renewable every three years and serve as the gateway to other cluster-support measures.

3. Introduce multiannual base funding for recognised clusters.
Recognised clusters should be eligible for four years of operating support of up to €150,000–€200,000 annually, with declining public-funding intensity and progressively increasing private-income targets.

For 20 cluster organisations, this would require approximately €12–16 million over four years.

4. Introduce a "cluster bonus" across ERDF and Research–Innovate programmes.
Following approaches used in Poland and Portugal, proposals involving members of recognised clusters could receive additional evaluation points or access dedicated strands.

At the same time, new cooperation structures should be required to demonstrate how they connect with recognised cluster organisations in the same sector, rather than creating parallel structures.

5. Support quality labelling and professional cluster management.
The state should cover the cost of ESCA assessments — roughly €2,000 for Bronze, €5,500 for Silver and €12,000 for Gold, including assessor travel — and finance annual professional training for cluster managers, following models such as Germany's go-cluster programme.

The total cost should remain below €300,000 annually. A realistic national objective would be ten Greek clusters holding ESCA Silver labels by 2030.

6. Evaluate existing interventions before launching the next funding round.
An independent evaluation of the 2019–2023 cluster actions should be completed before the third Innovation Clusters call. Recognised clusters should subsequently report against a limited set of annual output and outcome indicators.

7. Establish permanent institutional dialogue.
Greece should create a structured forum, inspired by Austria's Clusterplattform, bringing together GSRI, the General Secretariat for Industry, regional authorities and cluster organisations twice a year.

This should be complemented by a designated cluster desk officer within GSRI and formal representation of cluster organisations in the RIS3 entrepreneurial discovery process.

8. Co-finance the own contribution of recognised clusters in EU projects.
Most EU programmes in which clusters participate require an own contribution — typically 20–50% under Interreg, Digital Europe and the Interregional Innovation Investments (I3) instrument. For public research organisations and universities, Greece already covers this contribution through the Public Investment Programme. Cluster organisations, which bring SMEs into the same consortia, receive no equivalent support and often cannot afford to participate or to coordinate.

The European Commission could support implementation, with DG REFORM providing technical support in designing the policy, while DG GROW, through the ECCP and the Expert Group on Cluster Policy, could provide experience and best practices to the Greek authorities.

Sources: ECCP Country Factsheet Greece 2024; ECCP Input Paper for Clusters meet Regions Attica 2026; ECCP Summary Report on Cluster Policies 2022 and ECCP Summary Report 2025; European Cluster Panorama 2024; GSRI and regional programme documents 2019–2026; national cluster programmes of DK, NO, FR, DE, ES, PL, PT, AT.

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