Industrial ecosystems and SMEs in the 2028–2034 EU budget

Two files after the European Parliament's committee vote on the Competitiveness Fund — and what Members of the European Parliament and national governments can do

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In short

Two Regulations will decide whether the next EU budget supports industrial ecosystems — the collaboration between small and medium-sized enterprises (SMEs), larger companies, research organisations, skills providers and public authorities that cluster organisations build and orchestrate — and whether it can measure what SMEs gain from them.

- **The European Competitiveness Fund (ECF).** On 10 Nov 2026 the European Parliament's industry committee (ITRE) adopted its position and its mandate to negotiate with the Council. The text defines the future "EU for Business Network" as a "successor to the Enterprise Europe Network" (Article 28(2)). Yet its own recital 80, unchanged from the Commission proposal and shared by the Council, builds the EU for Business Network on the Enterprise Europe Network (EEN), the European Cluster Collaboration Platform (ECCP) and other networks; and the Council's text names no predecessor. The decisive stage is now the negotiation between Parliament and Council (the trilogue), from December 2026 to mid-2027, where the initiative lies with national governments in the Council. *The risk:* an EU for Business Network built for advice to individual firms alone, with no function, no calls and no budget of its own for the work that organises cooperation between companies. *Ask:* make the article say what the recital says, and give the ecosystem level a function in Articles 16 and 28.
- **The budget performance framework** (COM(2025) 545) will classify and measure every euro of 2028–2034, the ECF included. The word "cluster" appears nowhere in its Annex I, and the Council removes "SMEs" and "ecosystems" from the field where cluster services fall. Parliament's joint committee on budgets and budgetary control (BUDG–CONT) is provisionally due to vote on 30 Nov 2026; the compromise amendments are being negotiated now. *The risk:* cluster support would have to compete inside generic enterprise measures, and the national and regional plans would carry fewer dedicated cluster measures. *Ask:* four targeted changes — a dedicated field for innovation clusters (63a), one collaboration indicator, a title and footnote for field 63, and the classification of cascade funding once the SME sub-projects are selected.

Neither ask creates a new programme, a structure or an entitlement. Both preserve what the EU has already decided: that ecosystems matter (recital 5 of the ECF) and that cluster support deserves a classification of its own (codes 063 and 026 since 2014).

1. Where the two files stand

For the companies in Europe's industrial ecosystems — around 155,000 members of 1,258 cluster organisations registered on the ECCP, nearly 80% of them SMEs — two texts of the 2028–2034 Multiannual Financial Framework (MFF) matter most: the Regulation that will fund them and the Regulation that will measure them.

	File 1 — European Competitiveness Fund (ECF)	File 2 — Budget performance framework
Document	Regulation establishing the ECF, COM(2025) 555, 2025/0555(COD)	Regulation establishing a budget expenditure tracking and performance framework, COM(2025) 545, 2025/0545(COD)
Parliament	ITRE position adopted on 10 Nov 2026 by 61 votes to 13, with 12 abstentions: a single compromise amendment covering the whole Regulation, tabled by five political groups. Negotiating mandate: 56 votes to 26, with 4 abstentions. Co-rapporteurs Christian Ehler (EPP, DE) and Dan Nica (S&D, RO). The mandate is expected to go to plenary on 23–26 Nov 2026	BUDG and CONT jointly; co-rapporteurs Jean-Marc Germain (S&D, FR) and Niclas Herbst (EPP, DE); draft report PE787.767 (05 Oct 2026); compromise amendments under negotiation; committee vote provisionally 30 Nov 2026; plenary indicatively 14 Dec 2026
Council	Partial general approach, 16 Jun 2026 (ST 10625/26)	Partial mandate, 26 Jun 2026 (ST 11033/26)
Next	Trilogues expected from Dec 2026 (Irish Presidency), continuing Jan–Jun 2027 (Lithuanian Presidency)	Trilogues in 2027 (Lithuanian Presidency); Commission to detail indicator definitions and methods (Article 8(3))

	File 1 — European Competitiveness Fund (ECF)	File 2 — Budget performance framework
What is at stake	Whether the Fund's business support covers the work that organises cooperation between companies, as well as advice to the individual firm, and whether the Value Chains Builder has someone on the ground to prepare its projects	Whether national and regional plans keep dedicated measures for clusters and industrial ecosystems, and whether their results can be measured

2. File 1 — The European Competitiveness Fund after the committee vote

What the committee adopted on 10 Nov 2026. ITRE voted one compromise amendment rewriting the whole Regulation; all other amendments fell, including those naming clusters in the EU for Business Network. In the adopted text:

- **The EU for Business Network.** Article 27 is deleted and the EU for Business Network moves into Article 28 on business support. Article 28(2) establishes it "as a successor to the Enterprise Europe Network", with a work stream for start-ups and scale-ups, and has the Fund's business support measures implemented "in particular through" it. Article 28(2a) lists nine services — advice, access to finance, innovation uptake, internationalisation, skills, start-up and scale-up ecosystems, the digital and green transition, regional outreach and feedback to policymakers — delivered in coordination with existing Union, national and regional initiatives. It refers to start-up and regional innovation ecosystems, but not to industrial ecosystems, value chains or cluster organisations.
- **Recital 80 is unchanged.** As in the Commission and Council texts, it has the EU for Business Network established "building on" the EEN, the ECCP "and other networks". Article and recital of the same text now say different things.
- **Project Advisory (Article 26).** Cooperation with "European clusters" is kept, alongside industrial alliances, business organisations and local and regional authorities.
- **Value Chains Builder (Article 16).** The calls now also support the "connection between innovation and industrial ecosystems" and may include targeted actions for cross-border value chains and SME participation. Support becomes conditional on credible arrangements for the offtake of what the value chain produces, and Member State co-funding counts in the evaluation. The text still does not say who maps the gaps, mobilises the suppliers and forms the consortia.
- **Two anchors are lost.** Article 31(2) — the legal base for advisory and business support services "and any dedicated platform", where ECCP-type services and Eurocluster-type actions fit — is deleted. Article 30 on skills is rewritten without the link between vocational partnerships and "regional industrial ecosystems".
- **Resources.** EUR 1.8 billion is set aside for Project Advisory, SME Collaboration, the EU for Business Network and Access to Funding (Article 4(2)(aa)), in a Fund that Parliament would raise from EUR 234.3 billion to EUR 264.35 billion.

What it means. On the foundations of the EU for Business Network, Parliament's article now stands alone. The Commission proposal and the Council's general approach name no predecessor: the Council's Article 27(1) says only that the EU for Business Network "shall be established", and its Article 28(1) asks business support to take account of "existing or new structures and work across Member States". All three institutions keep the same recital. That is the opening for the trilogue: the article can be aligned with wording that all three institutions have already accepted in the recital. Parliament's negotiators work from the committee text, so the initiative lies with the Council.

What is at risk. The basic act is the mandate for the work programmes and calls of 2028–2034. If it establishes the EU for Business Network as the successor of a single network and gives it no function for value chains and industrial ecosystems, the calls that implement it would be designed for advice to individual firms. Their format, objectives and eligible activities would not be geared to business collaboration or the development of industrial ecosystems. Cluster organisations would be left with a reduced role, in functions and in budget, as one more beneficiary of calls designed for another purpose.

The cost would fall on enterprises:

- **Companies** would lose the actions that organise their coordination and cooperation along the value chain.
- **SMEs** would lose the joint actions that give them critical mass and shared capabilities they cannot build alone.
- **Industrial ecosystems** would lose the capacity that orchestrates them.

Advice to the individual firm is indispensable and would continue. What would disappear is the other level.

Why it matters for SMEs. Firm-by-firm advice serves the firms that already come forward. Cluster organisations bring in the ones that do not, and provide what no single firm can organise alone: value-chain intelligence and strategic coordination; supplier development and integration of SMEs into value chains; joint innovation, technology-uptake and skills programmes; shared infrastructures; cross-border partnerships and investment mobilisation; collective responses to industrial transitions and crises. Both levels are needed and neither replaces the other. Where the ecosystem level is left implicit, funding reaches the companies that already know how to apply, value-chain calls receive few consortium-based proposals because nobody is resourced to form them, and the Union-wide, geographically balanced coverage that Parliament and the Council both write into the EU for Business Network stays on paper.

What ECA asks in the trilogue — six targeted changes, compatible with all three texts:

1. **Foundations of the EU for Business Network** (Parliament Article 28(2); Council Article 27(1)): no single predecessor. Use the wording of recital 80 that the three institutions share — "building on" the EEN, the ECCP "and other networks" — with EEN partners and cluster organisations taking part on an equal footing as delivery partners, on transparent quality criteria.
2. **Functions of the EU for Business Network** (Parliament Article 28(2a); Council Article 28(1)): an explicit ecosystem and value-chain function, alongside every firm-level service in Parliament's catalogue.
3. **Participation safeguards** (Parliament's coordination clause): balanced participation, common quality standards and referral between partners; access not conditional on prior EEN membership.
4. **Value Chains Builder** (Article 16): a facilitation and continuity role for cluster organisations and other ecosystem intermediaries — mapping capabilities and gaps, mobilising SMEs and lower-tier suppliers, preparing collaborative projects and pipelines.
5. **Article 31(2):** keep the Commission and Council text on advisory and business support services and dedicated platforms; and keep, in Article 30, the Council's link between skills partnerships and regional industrial ecosystems.
6. **Article 4(2)(aa):** keep Parliament's EUR 1.8 billion line and name cluster cooperation actions within it.

No service of the EEN is removed, no entitlement is created and no new structure is needed. **Who shares the principle:** ECA, EURADA (regional development agencies) and the Vanguard Initiative (regional governments) ask, in their joint statement *Complementary strengths. Equal footing. Shared solutions.*, for cluster organisations and EEN partners to be placed on an equal footing in the EU for Business Network and for an ecosystem and value-chain function in both instruments. The statement of 09 Nov 2026 is at clustersalliance.eu/joint-statement-ecf. The Commission's own Expert Group on Cluster Policy reached the same conclusions independently in its working-group papers of October 2026, recommending that qualified cluster organisations be recognised as delivery partners "in the basic act now, rather than in its implementing rules".

3. File 2 — Industrial ecosystems and SMEs in the post-2027 performance framework

Which document. COM(2025) 545 is not a spending programme but the horizontal rulebook for all of them. Its Annex I lists 543 "intervention fields", each with EU coefficients and output and result indicators, under which every programme — the ECF and the National and Regional Partnership Plans included — will classify and report its spending (Articles 8, 14 and 16).

What is at risk. Annex I does not decide what is eligible (Article 8(2)); it decides what programmes can plan, report and defend. Without a field and indicators of its own, support for cooperation between companies would have to compete inside generic enterprise measures. The foreseeable result is fewer dedicated cluster measures in the national and regional plans, and the erosion of the capacity built since 2014: today 118 programmes, in 23 Member States and in Interreg, classify EUR 1,120.6 million of EU financing under the cluster code.

The problem in four facts.

1. The word "cluster" appears nowhere in the Commission proposal (543 fields) nor in the Council's partial mandate of 26 Jun 2026 (ST 11033/26).
2. Cluster services fall most naturally under field 63. In the Commission text it is "Support to innovation and advanced support services for SMEs – Processes, Ecosystems, and Strategic Development"; the Council retitles it "Support for competitiveness and innovation in enterprises", dropping SMEs, support services and ecosystems and adding large enterprises. In neither version is collaboration, cross-border partnership or the intermediary's role identified.
3. This is a step backwards, not a continuation. Cohesion policy has classified cluster support for twelve years: code 063, "Cluster support and business networks primarily benefiting SMEs" (2014–2020), and code 026, on support for innovation clusters and business networks primarily benefiting SMEs (2021–2027). The new Annex I has no such code.
4. EU policy already recognises intermediaries, but measurement does not. The framework counts the private users of the European Digital Innovation Hubs (field 67 in the Commission text, field 98 in the Council text); Council Recommendation (EU) 2022/2415 on knowledge valorisation lists clusters among intermediaries; the Commission funds 16 Euroclusters that deliver cascade funding to SMEs.

What ECA asks — four targeted changes, no new programme, no new spending. Changes 2 to 4 work within the existing fields and stand on their own:

1. **A dedicated field 63a, placed after field 63**: "Support for innovation clusters and collaborative industrial ecosystems, including shared innovation infrastructure, cluster management and animation, specialised enterprise services and cooperation between enterprises, research organisations and public authorities". It continues code 026, uses output and result indicators already in the draft and carries 0% in every coefficient column.

2. **One collaboration indicator** in fields 63 and 65: "Number of enterprises taking part in collaborative actions facilitated by cluster organisations or other business intermediaries — by business size, type of intermediary and territorial scope". It counts enterprises, not intermediaries, reuses data beneficiaries already report, and fits with REGI's amendment 160 ("investment mobilised") and ITRE's amendments on valorisation and research cooperation.
3. **Field 63, title and footnote.** Keep the SME and ecosystem references in the title (as the ITRE opinion, amendment 43, already does) and add the ** footnote marker that lets a project be reassigned to a more specific field once its content is known, as for fields 334, 339 and 375. If the Council title prevails: "Support for competitiveness and innovation in enterprises, in particular SMEs, including through advanced support services and innovation ecosystems**".
4. **Cascade funding classified once the SME sub-projects are selected** (Article 8(2)): provisional classification at award, updated through existing reporting, each amount counted once — the delivery model of Euroclusters, Interregional Innovation Investments and Horizon Europe.

Two safeguards worth keeping: the Member State flexibility of Article 14(2) to use indicators outside Annex I where a measure "cannot be adequately captured" (the Council broadened it; the ITRE and REGI opinions would delete it; ECON amendment 22 and EMPL amendment 71 keep it), and the stakeholder consultation mechanism of the draft report's new Article 8a (amendment 46), to which business intermediaries, including cluster organisations, should be added.

One line to remember: cohesion policy has had a field for cluster support since 2014, and the framework already identifies the users of digital innovation hubs; it can keep that field and identify, with proportionate reporting, the enterprises that collaborate through cluster organisations and other intermediaries.

4. What can be done now

Members of the European Parliament

If the Member…	When	What helps
sits on BUDG or CONT	Now — before the joint committee vote, provisionally 30 Nov 2026	Ask the co-rapporteurs and their group's shadow rapporteur to carry the four changes into the compromise amendments: the dedicated field 63a as a new line of Annex I, and the other three as support for texts already on the table (ITRE amendment 43, REGI amendment 160, draft report amendments 42–44 and 46) plus two small additions (the collaboration output and the ** marker); keep the Article 14(2) flexibility.
sits in any committee	Plenary on the framework, indicatively 14 Dec 2026	If the compromise leaves the changes out, support a plenary amendment on field 63a, the title of field 63 and the collaboration indicator tabled by their group.
sits on ITRE or is close to the ECF negotiating team	Before the trilogue opens, and throughout it (Dec 2026 – Jun 2027)	Ask the co-rapporteurs and their group's shadow rapporteur to treat the foundations of the EU for Business Network as open for agreement with the Council: Article 28(2) aligned with Parliament's own recital 80; the Council's Articles 30 and 31(2) accepted; an ecosystem and value-chain function added in Articles 16 and 28; the cooperation with European clusters (Article 26(3)) and the EUR 1.8 billion line defended.
works with the Commission	2027, implementation	Ask that "collaborative action" and a classification matrix for cluster services enter the indicator methodology the Commission must detail under Article 8(3), and that delivery partners in the EU for Business Network are selected on transparent quality criteria.

National governments. In the trilogue the Presidency negotiates for the Council on the basis of the general approach; what delegations say in the Council's working party and in the Permanent Representatives Committee decides how firmly it holds each point and whether it puts new wording on the table.

Who	When	What helps
The ministry responsible for industry, SMEs or cluster policy, and the Permanent Representation (ECF)	Now, and at each stage of the trilogue	Keep the Council's wording on the EU for Business Network: no predecessor in Article 27(1), recital 80 as it stands; if a reference to existing networks enters the article, take it from the recital. Keep Articles 26(3), 30 and 31(2). Propose, in the Council's working party, an ecosystem and value-chain function in the EU for Business Network and in the Value Chains Builder (wording for both files in ECA's note for Member States of 18 Nov 2026).

Who	When	What helps
The finance ministry and the budget counsellor at the Permanent Representation (performance framework)	Trilogue, 2027	Support a dedicated field 63a for innovation clusters and one collaboration indicator; accept a title for field 63 that keeps SMEs and innovation ecosystems, with the ** marker, and the classification of cascade funding once the SME sub-projects are selected; keep the Article 14(2) flexibility that the Council itself broadened.
The authorities preparing the National and Regional Partnership Plan	2027	Use Article 14(2) to add a collaboration indicator with a common definition.

5. What SMEs gain from industrial ecosystems — the evidence

- **Catalonia (ACCIÓ, control-group evaluation, 2017–2020 data):** 1,828 cluster-member firms outperformed 13,734 matched non-member firms on every indicator — turnover growth 25.4% against 9.9%, job creation 18.5% against 11.8%, export share 56.5% against 47.9%, participation in Horizon 2020 projects 11.1% against 2.1%.
- **Flanders (independent econometric evaluation of the Spearhead Cluster programme):** cluster membership raised firm-level total factor productivity by around 4%.
- **Poland (PARP national benchmarking, 2024):** 42% of cluster-member enterprises generate export revenue, against an estimated 4.9% of all Polish enterprises for goods.
- **Euroclusters (EISMEA):** 16 partnerships with a EUR 42 million budget, of which more than EUR 30 million reaches SMEs through open calls — proven capacity to run cascade funding with calls, evaluation, contracting and audit trail.

Recognising cluster organisations adds no new actor to the EU budget: it uses an existing, accountable, SME-based infrastructure to deliver what the Fund already promises, and lets the framework count what SMEs gain from it.

About the European Clusters Alliance

The ECA (AISBL, Brussels) is the association of national and regional cluster networks in Europe: more than 1,000 cluster organisations, some 150,000 companies and around 11,000 universities, research centres and public institutions. It sits in the Commission's Industrial Forum and Expert Group on Cluster Policy. Its stakeholder consultation on the future EU for Business Network is open until 30 Nov 2026 (clustersalliance.eu/eca-consultation). ECA lead on the performance framework: Daniel Cosnita, Board member and President of CLUSTERO (Romania).

Sources. COM(2025) 555 and COM(2025) 545 (eur-lex.europa.eu); Council ST 10625/26 and ST 11033/26 (data.consilium.europa.eu); European Parliament, ITRE meeting of 10 Nov 2026, item 13: compromise amendment 1 and voting list on the ECF (emeeting.europarl.europa.eu), and press release of 10 Nov 2026; European Parliament PE784.506, PE787.767, ITRE PE784.361, REGI PE785.455, ECON PE786.895, EMPL PE785.252; Regulation (EU) 2021/1060, Annex I (code 026); Implementing Regulation (EU) No 215/2014, Annex I (code 063); Council Recommendation (EU) 2022/2415; ECCP Summary Report 2025; Cohesion Open Data (cohesiondata.ec.europa.eu), consulted in November 2026; EISMEA, 20 Oct 2025; ACCIÓ evaluation (2017–2020 data); PARP Benchmarking 2024; Journal of Regional Science (2024/2025); Expert Group on Cluster Policy working-group papers, Sep–Oct 2026 (not an official Commission position); ECA–EURADA–Vanguard joint statement, published 09 Nov 2026. The committee text may still undergo technical adaptation before plenary.