

D2.2 - Regional Ecosystem Mapping Reports



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Executive Summary

Deliverable **D2.2 – Regional Ecosystem Mapping Report** presents the results of the ecosystem mapping activities implemented within **Work Package 2: Establishment of FashionKIC Regional Nodes**. The deliverable provides a comprehensive analysis of the regional fashion and textile innovation ecosystems participating in FashionKIC, namely **Greece, Portugal, Romania and Spain**, establishing a common evidence base to support the development of the Regional Nodes and the implementation of subsequent project activities.

The report applies a common ecosystem mapping methodology combining quantitative and qualitative research, stakeholder identification and engagement, desk research, ecosystem mapping canvases and comparative analysis. The methodology enabled the systematic assessment of the participating regional ecosystems, focusing on socioeconomic conditions, stakeholder composition, innovation capacity, education and research infrastructure, sustainability priorities, governance structures and collaboration potential.

The deliverable presents a comparative analysis of the four Regional Nodes, highlighting their common strengths, structural challenges and opportunities for collaboration. The findings demonstrate that, while the participating ecosystems differ in terms of industrial maturity, regional priorities and stakeholder composition, they share common ambitions related to sustainability, digital transformation, innovation and ecosystem development. At the same time, each Regional Node contributes complementary expertise, creating favourable conditions for knowledge exchange, cross-border collaboration and the development of a resilient European fashion innovation ecosystem.

The ecosystem analysis highlights five main conclusions. First, the four Regional Nodes bring complementary strengths: Greece combines creative entrepreneurship, cultural heritage and sustainable design; Portugal contributes advanced, export-oriented textile manufacturing and research capacity; Romania provides strong industrial production and specialised manufacturing expertise; and Spain offers a diversified ecosystem integrating design, industry, technology and internationally connected value chains. Second, SMEs form the backbone of all four ecosystems, making access to innovation support, specialised knowledge and cross-border networks a shared priority. Third, ecosystem fragmentation and uneven collaboration between industry, academia, research, public authorities and intermediary organisations remain common structural barriers. Fourth, skills gaps, digitalisation and the sustainability transition create shared capacity-building needs across the four regions. Finally, these differences and common challenges create a strong basis for cross-node cooperation, particularly through knowledge exchange, collaborative innovation, SME support, capacity building and the transfer of governance practices.

In addition, the report includes individual Country Ecosystem Mapping Reports for Greece, Portugal, Romania and Spain, providing detailed analyses of each regional ecosystem, including stakeholder landscapes, ecosystem characteristics, collaboration

structures and strategic positioning within FashionKIC. These country profiles complement the comparative assessment and provide the evidence required to support Regional Node implementation and stakeholder engagement activities throughout the project.

Finally, the deliverable translates the ecosystem mapping findings into strategic implications and recommendations for FashionKIC. These recommendations provide guidance for the implementation of the project's core activities, including Regional Node development, stakeholder engagement, capacity building, innovation support, sustainability actions and cross-node collaboration. Consequently, D2.2 establishes the strategic and analytical foundation for the next phases of the project.

Overall, D2.2 constitutes a key strategic deliverable that not only maps the participating regional ecosystems but also provides an evidence-based foundation for strengthening collaboration, fostering innovation and supporting the long-term development of the FashionKIC Knowledge and Innovation Community.

1. Introduction

1.1 Background

The European fashion and textile sector is at a pivotal moment, facing unprecedented challenges and opportunities driven by the green and digital transition. The increasing demand for sustainable production models, circular business practices, digital innovation, and resilient value chains is fundamentally reshaping the sector, requiring new forms of collaboration between industry, academia, public authorities, and innovation support organisations. At the same time, the sector continues to experience structural fragmentation, uneven innovation capacity across regions, skills shortages, and limited collaboration between creative industries, manufacturing, research organisations, and policy actors.

Recognising these challenges, the **FashionKIC (Knowledge Innovation Community for Sustainable Fashion)** project has been established under the Creative Europe Programme to strengthen Europe's fashion and textile innovation ecosystem through a coordinated network of regional stakeholders. The project aims to accelerate the sector's green and digital transition by creating a collaborative Knowledge and Innovation Community (KIC) that supports knowledge exchange, capacity building, innovation, and long-term ecosystem development. FashionKIC combines digital innovation, sustainability, entrepreneurship and community-building through an integrated approach that links regional ecosystems into a broader European network.

A central feature of the project is the establishment of four Regional Nodes in Greece, Portugal, Romania and Spain. These Nodes function as regional innovation hubs that connect designers, fashion brands, manufacturers, research organisations, higher education institutions, business support organisations, public authorities and other ecosystem stakeholders. By strengthening regional collaboration while facilitating transnational cooperation, the Nodes are expected to enhance knowledge circulation, support innovation uptake and contribute to the long-term competitiveness of Europe's fashion and textile ecosystem.

Within this framework, Work Package 2 (WP2) focuses on the development and positioning of the Regional Nodes through a structured ecosystem mapping process. Understanding the characteristics, capacities and collaboration dynamics of each regional ecosystem constitutes a prerequisite for designing effective interventions throughout the project lifecycle. The ecosystem mapping therefore provides the analytical foundation upon which subsequent project activities will be developed, ensuring that FashionKIC responds to actual regional needs while fostering stronger European collaboration.

1.2 Purpose of Deliverable D2.2

Deliverable D2.2 – *Regional Ecosystem Mapping Report* presents the results of the ecosystem mapping activities conducted across the four participating FashionKIC Regional Nodes. The report provides a comprehensive analysis of the regional fashion

and textile ecosystems in Greece, Portugal, Romania and Spain, following a common methodological framework that ensures consistency and comparability across all participating countries.

The primary objective of the deliverable is to generate an evidence-based understanding of each regional ecosystem by identifying its socioeconomic characteristics, industrial profile, stakeholder composition, innovation capacity, education and research infrastructure, sustainability initiatives and existing collaboration mechanisms. Beyond documenting the current state of each ecosystem, the report analyses their respective strengths, structural gaps and emerging opportunities, highlighting the factors that influence their capacity to support innovation and sustainable growth.

The ecosystem mapping is not intended as a standalone research exercise. Instead, it constitutes a strategic implementation tool that supports the establishment and operational development of the FashionKIC Regional Nodes. The findings generated through this deliverable are expected to inform stakeholder engagement strategies, platform development, capacity-building activities, acceleration services, policy-oriented actions and communication initiatives implemented throughout the project. In this respect, D2.2 serves as the principal knowledge base supporting the implementation of the wider FashionKIC initiative and contributes directly to achieving its overall objectives.

1.3 Scope and Structure of the Report

The report covers four regional ecosystems representing complementary geographical, industrial and innovation contexts within the European fashion and textile landscape. Although each participating region exhibits distinct characteristics in terms of industrial structure, stakeholder composition and innovation maturity, all four ecosystems share a common ambition to strengthen collaboration, accelerate sustainable transformation and enhance regional competitiveness through the FashionKIC initiative.

To ensure methodological consistency, all regional analyses have been developed using a common ecosystem mapping framework based on three complementary layers of analysis. The approach combines quantitative evidence, stakeholder mapping and qualitative assessment, enabling a comprehensive understanding of each regional ecosystem while preserving the flexibility required to capture local specificities.

The report is organised into six chapters. Following this introductory chapter, Chapter 2 presents the common methodology adopted for the ecosystem mapping exercise, describing the analytical framework, data collection process and validation approach applied across all participating countries. Chapter 3 provides a comparative analysis of the four regional ecosystems, identifying common characteristics, structural differences and opportunities for cross-border collaboration. Chapter 4 presents the individual Country Ecosystem Mapping Reports for Greece, Portugal, Romania and Spain. Building upon these findings, Chapter 5 discusses the strategic implications for the implementation of FashionKIC across Work Packages 1 to 6. Finally, Chapter 6 summarises the principal conclusions and outlines recommendations for strengthening

regional collaboration, supporting ecosystem development and maximising the long-term impact of the FashionKIC initiative.

Through this structure, the report moves progressively from methodology to evidence, from national ecosystem analysis to cross-country comparison, and ultimately to strategic recommendations that support the implementation of the project. In doing so, D2.2 provides both a comprehensive overview of the participating regional ecosystems and a practical knowledge base to guide the next phases of FashionKIC.

2. Methodology

2.1 Methodological Approach

The Regional Ecosystem Mapping was designed to provide a structured, evidence-based understanding of the regional fashion and textile ecosystems participating in the FashionKIC project. As a core activity of Work Package 2, the mapping establishes a common analytical foundation for the development and positioning of the four Regional Nodes, while ensuring consistency, comparability and methodological coherence across all participating countries.

The mapping methodology builds directly on the FashionKIC Node Operational Framework established in Deliverable D2.1, which provides the common operating basis for the Regional Nodes. In particular, D2.1 establishes sustainability as a cross-cutting operational consideration through an ESG perspective, a value-chain lens and a materiality approach. D2.2 applies this logic to ecosystem mapping by examining the sustainability-related characteristics of each regional ecosystem, considering the positioning and diversity of actors across the fashion and textile value chain, and identifying regionally relevant strengths, gaps and transition priorities. In this way, the ecosystem mapping translates the operational principles established in D2.1 into an evidence base for subsequent Regional Node activities and implementation decisions.

Given the diversity of the participating regional ecosystems, a common methodological framework was adopted to enable the systematic collection, organisation and interpretation of information. Rather than focusing exclusively on statistical indicators or stakeholder inventories, the methodology combines quantitative evidence, qualitative assessment and stakeholder mapping to capture the complexity of each regional ecosystem and its capacity to support innovation, sustainability and collaboration.

The methodological approach was jointly developed and implemented by all project partners to ensure that the ecosystem mapping followed a harmonised process while allowing sufficient flexibility to reflect regional specificities. This common framework enables the comparative assessment of the four participating ecosystems in Greece, Portugal, Romania and Spain and provides a reliable evidence base for the implementation of subsequent FashionKIC activities.

2.2 Ecosystem Mapping Framework

The ecosystem mapping methodology is based on a three-layer analytical framework that combines complementary sources of evidence to provide a comprehensive understanding of each regional ecosystem. The three layers are designed to progressively move from data collection to ecosystem interpretation and strategic synthesis, ensuring that the final assessment is both evidence-based and operationally relevant.

In accordance with the scope defined in the Grant Agreement, the mapping examines key stakeholders, existing initiatives and regional specialisations across the four Regional Nodes, together with five core analytical dimensions: regional context, market dynamics, policy frameworks, educational landscapes and industrial strengths.

This three-layer framework was selected because it responds directly to the operational requirements of FashionKIC and the diversity of the four participating Regional Nodes. Rather than relying exclusively on quantitative indicators or on a purely descriptive stakeholder inventory, the approach combines comparable evidence with contextual interpretation and a concise strategic synthesis. This makes it possible to maintain a common analytical structure across Greece, Portugal, Romania and Spain while preserving sufficient flexibility to reflect differences in ecosystem maturity, industrial structure, stakeholder composition and regional priorities. Importantly, the framework also enables the mapping findings to be translated into practical implications for stakeholder engagement, Regional Node activation and subsequent project activities, consistent with the implementation-oriented logic established in D2.1.

Layer 1 – Ecosystem Mapping Canvas

The Ecosystem Mapping Canvas serves as a structured synthesis tool that captures the essential characteristics of each regional ecosystem. It provides a concise overview of the regional context, stakeholder landscape, key ecosystem actors, priority target groups, existing collaboration mechanisms, ecosystem strengths and weaknesses, identified gaps, opportunities and implications for future action.

Rather than functioning as a standalone analytical output, the Canvas supports the interpretation and visual summarisation of the findings generated through the broader mapping process. Within Deliverable D2.2, the completed Ecosystem Mapping Canvases are presented in the Annexes as a visual reference for each participating country.

Layer 2 – Supporting Evidence and Data Collection

The second layer provides the empirical evidence supporting the ecosystem mapping exercise. It combines desk research, statistical information and documentary analysis to establish a comparable knowledge base across the four participating countries.

Data collection covered multiple dimensions of the regional ecosystems, including:

- socioeconomic and demographic characteristics;
- structure and performance of the fashion and textile sector;
- research, education and innovation capacity;
- sustainability and circular economy initiatives;
- policy and institutional framework;
- regional support mechanisms and innovation infrastructure.

To ensure comparability, partners collected information using common templates and shared reporting guidelines. Whenever possible, data were obtained from official statistical authorities, European databases, national and regional institutions, policy documents, sectoral reports and publicly available sources.

Layer 3 – Country Ecosystem Synthesis

The third layer translates the collected evidence into an integrated analysis of each regional ecosystem. Building upon the findings of the previous layers, each partner prepared a Country Ecosystem Synthesis describing the overall characteristics of its regional ecosystem, the structure of the stakeholder landscape, existing collaboration mechanisms, ecosystem strengths and weaknesses, emerging opportunities and priority areas for intervention.

The Country Ecosystem Syntheses constitute the analytical basis for the Country Ecosystem Mapping Reports presented in Chapter 4 and provide the evidence required for the subsequent comparative assessment across the participating Regional Nodes.

The combination of these three complementary layers ensures that the ecosystem mapping is supported by quantitative evidence, qualitative analysis and expert interpretation, providing a comprehensive and consistent assessment of each regional ecosystem.

2.3 Data Collection and Stakeholder Mapping Process

The ecosystem mapping was implemented through a common data collection process applied across all participating countries. The process combined secondary research, stakeholder identification and qualitative assessment to ensure a comprehensive representation of each regional fashion and textile ecosystem.

The first stage focused on desk research and the collection of comparable regional data. Partners compiled information relating to socioeconomic conditions, industrial characteristics, innovation performance, education and research infrastructure, sustainability initiatives and relevant policy frameworks. The use of common reporting templates ensured consistency in the collection and presentation of information across the four Regional Nodes.

The second stage involved the identification and mapping of key ecosystem stakeholders. Partners systematically identified organisations representing the main components of the regional fashion and textile ecosystem, including designers and creative professionals, fashion brands and SMEs, manufacturers and suppliers, research organisations, higher education institutions, innovation intermediaries, clusters, business support organisations, public authorities and other relevant actors. Stakeholder identification was supported by documentary research, existing partner networks and regional ecosystem knowledge.

The final stage consisted of synthesising the collected evidence into integrated ecosystem profiles. Quantitative information was interpreted alongside qualitative

insights in order to identify ecosystem characteristics, collaboration dynamics, existing strengths, structural gaps and opportunities for future development. This synthesis formed the basis for both the country analyses and the cross-country comparison presented in the following chapters.

2.4 Data Validation and Quality Assurance

To ensure methodological consistency and the reliability of the findings, a common quality assurance process was implemented throughout the ecosystem mapping exercise.

All partners followed the same methodological framework, data collection templates and reporting structure. Continuous coordination among partners ensured a common interpretation of the methodology and promoted consistency in stakeholder categorisation, ecosystem analysis and reporting.

Following the completion of the national mapping activities, the collected information was internally reviewed to verify completeness, coherence and consistency across countries. Particular attention was given to ensuring that the four Regional Nodes were analysed according to comparable criteria while preserving the specific characteristics of each regional ecosystem.

This collaborative validation process strengthens the overall robustness of the ecosystem mapping and enhances the comparability of the findings presented throughout this deliverable.

The stakeholder mapping also provides an evidence base for the establishment and composition of the Local Advisory Groups foreseen under WP2. In accordance with the FashionKIC Node Operational Framework (D2.1), these groups are intended to reflect ecosystem diversity by bringing together representatives from different stakeholder categories and to provide a consultative mechanism for testing relevance, identifying opportunities and maintaining external anchoring of each Regional Node. The mapping presented in D2.2 can therefore support the identification of appropriate profiles and balanced representation across the Advisory Groups, while the formal establishment and operation of these groups remain part of the wider WP2 implementation process.

2.5 Methodological Considerations

The ecosystem mapping provides a baseline assessment of the four participating Regional Nodes during the implementation period of the FashionKIC project. The findings reflect the information available at the time of data collection and are primarily based on publicly available sources, documentary research, stakeholder mapping activities and the regional knowledge of the project partners.

Given the dynamic nature of innovation ecosystems, stakeholder networks and policy environments, regional ecosystems are expected to evolve over time. Consequently, the findings presented in this report should be interpreted as a structured snapshot of the participating ecosystems, providing the evidence base required to support the

implementation of subsequent FashionKIC activities rather than a static representation of the regional landscape.

The adoption of a common methodological framework ensures comparability across the participating countries while allowing each Regional Node to capture the specific characteristics of its local ecosystem. This balance between methodological consistency and regional flexibility represents one of the principal strengths of the ecosystem mapping approach adopted within FashionKIC.

Several methodological limitations should also be acknowledged. First, the mapping relies substantially on desk research, publicly available datasets, policy documents and sectoral sources. The availability, recency, level of detail and comparability of such information vary across the four participating countries, meaning that some ecosystem dimensions are supported by more extensive or recent evidence than others. These differences were mitigated through the use of common templates, partner knowledge and internal cross-country review, but they cannot be fully eliminated. Second, the qualitative descriptors used in the comparative analysis in Chapter 3—such as High, Moderate, Low, Emerging, Developing or Advanced—should be interpreted as comparative expert assessments rather than as scores derived from a formal numerical index. They reflect the synthesis of the evidence collected, regional partner knowledge and the comparative review process and are intended to support structured interpretation across the four Regional Nodes rather than to provide absolute rankings. Finally, as regional ecosystems, stakeholder networks and policy environments continue to evolve, the findings represent a baseline for implementation and may require updating as new evidence and stakeholder input become available during the project.

3. Comparative Analysis of the FashionKIC Ecosystems

This chapter compares the four FashionKIC Regional Nodes across their socioeconomic and sectoral characteristics, innovation and knowledge infrastructures, stakeholder landscapes, ecosystem strengths and gaps, and opportunities for collaboration. Figure 1 provides an overview of their distinctive regional assets and serves as a reference point for the comparative analysis that follows.

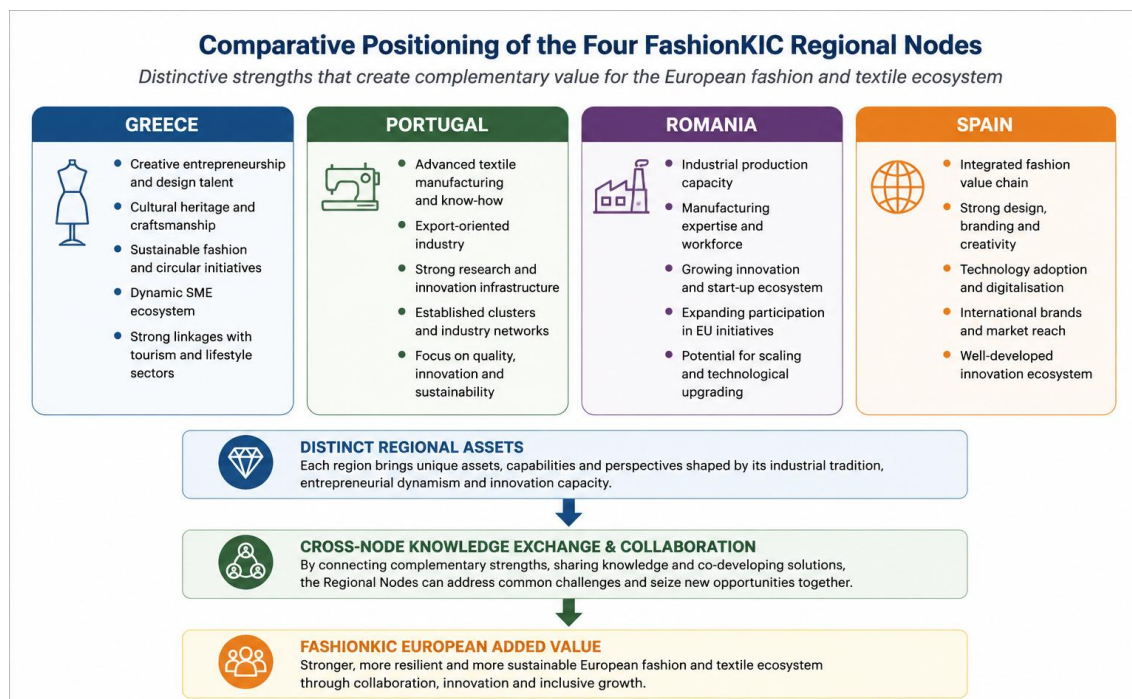


Figure 1: Comparative positioning of the four FashionKIC Regional Nodes

3.1 Socioeconomic and Sector Baseline

The four participating FashionKIC Regional Nodes—Greece, Portugal, Romania and Spain—represent complementary socioeconomic and industrial contexts that collectively reflect the diversity of the European fashion and textile ecosystem. Although the participating countries differ in terms of economic scale, industrial maturity and demographic characteristics, they share common challenges related to sustainability, digital transformation, skills development and ecosystem collaboration. These common characteristics provide a solid basis for the establishment of a transnational Knowledge and Innovation Community while allowing each Regional Node to contribute its own distinctive strengths and expertise.

Table 1: Comparative Socioeconomic Profile of the Participating Countries

Indicator	Greece	Portugal	Romania	Spain
Population	≈10.4 million	10.75 million	≈19.0 million	48.85 million
GDP (total)	≈ €238 bn	≈ €307 bn	≈ €355 bn	≈ €1.59 trillion
GDP per capita	≈ €24,700	≈ €33,696	≈ €17,000	≈ €35,327
GDP growth	≈2.3%	≈1.9%	≈0.9%	≈3.5%
Unemployment	≈8.2%	≈5.8%	≈5.4%	≈10.4%

Source: Compiled by the authors based on FashionKIC Layer 2 Supporting Evidence (Greece, Portugal, Romania and Spain), using Eurostat, ELSTAT, INE Portugal, INSSE Romania and World Bank data.

The comparative evidence demonstrates substantial variation in the overall size of the participating economies. Spain constitutes the largest economic ecosystem within the consortium, followed by Romania, Portugal and Greece. While economic scale differs considerably, all participating countries demonstrate stable macroeconomic conditions and sustained economic growth, creating favourable conditions for investment in innovation and regional ecosystem development.

Differences are also observed in labour market performance and purchasing power. Portugal records comparatively low unemployment levels and relatively high purchasing power among the participating countries, while Spain combines the highest GDP growth with persistent labour market challenges. Greece continues to improve its macroeconomic performance following previous periods of economic adjustment, whereas Romania represents one of the fastest developing manufacturing economies in Central and Eastern Europe despite comparatively lower income levels.

These socioeconomic characteristics provide important context for interpreting the structure and development potential of each regional fashion and textile ecosystem.

Table 2: Comparative Fashion and Textile Sector Profile of the Participating Countries

Indicator	Greece	Portugal	Romania	Spain
Indicative economic contribution of the sector	≈ €1.91 bn turnover	≈3% of GDP	≈ 6% of manufacturing value added	≈2.9% of GDP
Number of enterprises	4,921	14,959	≈9,900*	16,964
Ecosystem profile	Design, SMEs and creative industries	Export-oriented textile manufacturing	Manufacturing and production	Diversified fashion ecosystem

Indicator	Greece	Portugal	Romania	Spain
Main competitive advantage	Creative entrepreneurship	Advanced textile production	Industrial manufacturing capacity	International brands and integrated value chains

*Includes enterprises operating across textile, apparel and leather manufacturing activities.

Note: Due to differences in the availability and reporting of sector-level economic data across the four countries, the figures presented in the first row use the most relevant economic indicator available for each national ecosystem and should therefore be interpreted as indicative rather than directly comparable measures of sectoral contribution.

Source: FashionKIC Layer 2 Supporting Evidence; National Statistical Authorities; sectoral reports

The mapping confirms that the fashion and textile sector represents a strategically important economic activity across all participating countries, although the structure and maturity of the ecosystems differ significantly.

Spain exhibits the largest and most diversified ecosystem, characterised by internationally recognised fashion companies, extensive industrial clusters and a highly integrated value chain spanning design, manufacturing, retail and global distribution. Portugal demonstrates a strong export-oriented manufacturing base supported by continuous investments in technological modernisation, sustainability and advanced textile production. Romania contributes extensive industrial production capacity and specialised manufacturing expertise, maintaining an important position within European textile and apparel supply chains. Greece, while comparatively smaller in industrial scale, distinguishes itself through a dynamic creative sector, strong entrepreneurial culture and increasing emphasis on sustainable fashion, design and innovation.

Across all four Regional Nodes, small and medium-sized enterprises (SMEs) constitute the dominant organisational model. The prevalence of SMEs highlights the importance of collaborative innovation, business support services, access to specialised knowledge and cross-border networking as essential conditions for strengthening ecosystem competitiveness.

Furthermore, despite differences in industrial specialisation, the mapping demonstrates that all participating ecosystems are experiencing similar transition pressures associated with sustainability requirements, digitalisation, skills shortages and changing market expectations. These shared challenges reinforce the strategic rationale of FashionKIC as a collaborative European initiative capable of facilitating knowledge exchange and coordinated ecosystem development across regions.

3.2 Market Dynamics across the FashionKIC Regional Nodes

Market dynamics across the four FashionKIC Regional Nodes reflect differences in market scale, industrial orientation, enterprise structure, international exposure and transition pressures. Across the four ecosystems, SMEs constitute an important component of the fashion and textile sector, while sustainability requirements, digitalisation, changing consumer expectations and increasing regulatory demands are reshaping competitive conditions and creating new requirements for business adaptation.

The Greek fashion ecosystem is characterised by a strong presence of SMEs, independent designers, creative entrepreneurship and emerging sustainable fashion initiatives. Compared with the more manufacturing-intensive ecosystems represented within FashionKIC, Greece has a smaller industrial base but demonstrates market potential in design-led and specialised activities. Opportunities for market development are therefore closely linked to strengthening business capacity, improving access to innovation and finance, supporting internationalisation and leveraging design, cultural identity and sustainability as sources of differentiation.

Portugal is characterised by a strongly export-oriented textile and clothing industry, supported by advanced manufacturing capabilities, technical expertise and established integration into international markets. Its competitive position is increasingly linked to the capacity of firms to combine manufacturing excellence with technological innovation, sustainable production and higher-value activities. For SMEs in particular, continued adaptation to digitalisation, sustainability requirements and evolving market expectations remains important for maintaining competitiveness and international positioning.

Romania's market position is closely linked to its substantial manufacturing base and participation in European textile and apparel value chains. Its production capacity and manufacturing expertise provide an important competitive foundation, while market development increasingly depends on moving towards higher-value activities, strengthening innovation uptake and accelerating sustainable and digital transformation. Access to finance, technology and business support therefore represents an important factor in enabling SMEs and manufacturers to respond to changing competitive conditions.

Spain combines a large and diversified fashion market with internationally recognised brands, manufacturing capabilities and extensive participation in European and global value chains. Market dynamics are increasingly shaped by circularity requirements, digital transformation, regulatory compliance, international competition and changing consumer behaviour. While the maturity and scale of the Spanish ecosystem provide strong conditions for innovation and market development, SMEs continue to face pressures related to compliance costs, technological adaptation and the transition towards more circular business and production models.

Cross-country perspective. The comparison highlights different but interconnected market development needs across the four Regional Nodes. Manufacturing- and export-intensive ecosystems face continued pressure to upgrade technologies, invest in sustainability and maintain international competitiveness, while more design- and entrepreneurship-oriented segments require stronger pathways for scaling, finance, market access and internationalisation. Across all four Nodes, the green and digital transition therefore represents not only a policy and technological shift but also a market transformation affecting competitiveness, business models, skills needs and opportunities for cross-border collaboration.

3.3 Innovation, Education and Sustainability Context

Innovation, education and sustainability constitute three interdependent dimensions that significantly influence the competitiveness and long-term resilience of the participating Regional Nodes. The comparative assessment demonstrates that, although the four ecosystems differ in terms of institutional maturity and research capacity, they all recognise innovation and knowledge generation as key drivers of the green and digital transition of the fashion and textile sector.

Across the participating countries, higher education institutions, research organisations, innovation intermediaries and business support organisations collectively contribute to the development of regional innovation ecosystems. However, the level of integration between these actors and the fashion and textile industry varies considerably, highlighting both existing strengths and opportunities for stronger collaboration through the FashionKIC network.

Note on comparative assessments: The qualitative descriptors used in the comparative tables (e.g. High, Moderate, Low, Emerging, Developing, Advanced and Increasing) reflect comparative expert judgement based on the evidence collected through the ecosystem mapping process, regional partner knowledge and the cross-country review process. They are intended to support the interpretation of relative ecosystem conditions and development trajectories across the four Regional Nodes and should not be understood as scores derived from a formal numerical index. Binary indicators are reported as Yes/No where they refer to the documented presence or absence of a specific policy, institution or mechanism.

Table 3: Innovation, Education and Knowledge Infrastructure across the FashionKIC Regional Nodes

Dimension	Greece	Portugal	Romania	Spain
Universities offering fashion-, textile- or design-related programmes	Yes	Yes	Yes	Yes
Research organisations	Yes	Yes	Yes	Yes

Dimension	Greece	Portugal	Romania	Spain
supporting innovation				
Innovation hubs / clusters	Low	High	Moderate	High
Business support organisations	High	High	Moderate	High
Participation in EU innovation projects	Moderate	High	Moderate	High

The comparative mapping reveals that all participating Regional Nodes possess a robust institutional foundation capable of supporting innovation within the fashion and textile ecosystem. Universities and research organisations are present in each participating country and increasingly engage in activities extending beyond education, including applied research, technology transfer, entrepreneurship support and industry collaboration.

Portugal and Spain demonstrate comparatively mature innovation ecosystems characterised by well-established regional clusters, specialised technology centres and long-standing collaboration between academia and industry. Their institutional structures facilitate innovation uptake, applied research and international cooperation, particularly in sustainable textile production, advanced manufacturing and digital technologies.

Romania presents an expanding innovation landscape in which universities and research institutions are progressively strengthening their collaboration with industry. Although innovation support structures remain less mature than those observed in Portugal and Spain, increasing participation in European research and innovation programmes indicates positive development and significant growth potential.

Greece exhibits a dynamic innovation ecosystem supported by universities, research centres and business support organisations with recognised expertise in entrepreneurship, creativity and emerging technologies. While stronger institutional coordination could further enhance knowledge transfer, the ecosystem demonstrates considerable capacity for supporting innovation-driven SMEs and creative entrepreneurs.

Overall, the mapping indicates that the participating ecosystems possess complementary innovation capacities rather than competing capabilities. This diversity creates favourable conditions for transnational collaboration and knowledge exchange within the FashionKIC network.

Table 4: Comparative Assessment of Sustainability and Policy Frameworks

Dimension	Greece	Portugal	Romania	Spain
National Circular Economy Strategy	Yes	Yes	Yes	Yes
Sustainable Fashion Initiatives	Moderate	High	Moderate	High
Green Transition Policies	Yes	Yes	Yes	Yes
Digital Transformation Strategies	Yes	Yes	Yes	Yes
Public support for sustainable innovation	Moderate	High	Moderate	High
Alignment with EU Green Deal priorities	High	High	High	High

The analysis demonstrates that sustainability has become a strategic priority across all four Regional Nodes, reflecting both European policy developments and evolving market expectations. National and regional authorities have adopted policy frameworks supporting circular economy principles, resource efficiency, digital transformation and sustainable industrial development, creating a favourable institutional environment for ecosystem innovation.

Portugal and Spain currently exhibit the most mature sustainability ecosystems, characterised by extensive policy support, specialised innovation initiatives and increasing adoption of circular production practices within the textile industry. Their ecosystems demonstrate strong alignment between industrial competitiveness and sustainability objectives, supported by active collaboration among businesses, research organisations and public authorities.

In Greece, sustainability is increasingly embedded within entrepreneurship support, creative industries and innovation programmes. Although implementation remains heterogeneous across the ecosystem, growing stakeholder awareness and expanding participation in European initiatives indicate a positive trajectory towards more sustainable production and consumption models.

Romania has also made significant progress in aligning national and regional policies with European sustainability priorities. Nevertheless, further investment in circular economy practices, green technologies and industry-wide adoption of sustainable business models will be essential for accelerating the sector's transition.

Across all four countries, sustainability should not be interpreted solely as an environmental objective but as a strategic driver of innovation, competitiveness and long-term ecosystem resilience. The mapping highlights increasing convergence between sustainability, digitalisation and innovation policies, reinforcing the importance of integrated ecosystem approaches such as those promoted through FashionKIC.

Comparative Synthesis

The comparative assessment confirms that innovation, education and sustainability are closely interconnected across all participating Regional Nodes. Although differences exist regarding institutional maturity, investment capacity and ecosystem scale, each participating country possesses valuable assets that can contribute to the development of a stronger European Knowledge and Innovation Community.

Rather than concentrating expertise within individual regions, the ecosystem mapping demonstrates that the participating countries possess complementary capabilities. Portugal and Spain contribute extensive industrial and technological expertise, Romania offers significant manufacturing potential supported by a growing innovation ecosystem, while Greece combines creativity, entrepreneurship and emerging sustainability initiatives. Together, these complementary profiles create a balanced innovation landscape capable of supporting collaborative research, skills development, business acceleration and knowledge exchange across the FashionKIC network.

At the same time, differences between the four Regional Nodes may also create potential implementation frictions that should be considered alongside their complementary strengths. Variations in ecosystem maturity, institutional capacity, industrial structure, stakeholder coordination and access to innovation support may affect the pace at which regions engage in joint activities and their capacity to mobilise stakeholders or adopt common approaches. Differences in regional priorities and levels of established industry–academia collaboration may also require adaptation of shared methodologies rather than uniform implementation across all Nodes. These differences should therefore be treated not only as sources of complementarity, but also as factors requiring active coordination, flexible implementation and continuous knowledge exchange. Recognising these potential frictions at an early stage can help FashionKIC design cross-node activities that accommodate different starting points while maintaining common strategic objectives.

3.4 Cross-Country Stakeholder Landscape

The effectiveness of regional innovation ecosystems depends not only on the presence of relevant organisations but also on the diversity, connectivity and interaction of stakeholders across the value chain. The stakeholder mapping conducted within the FashionKIC project demonstrates that the four Regional Nodes exhibit a broadly comparable ecosystem architecture, while differing in terms of stakeholder density, institutional maturity and collaboration mechanisms.

Across all participating countries, the fashion and textile ecosystem is characterised by the coexistence of public, private and knowledge-based organisations that collectively contribute to regional innovation, skills development, entrepreneurship and sustainable transition. Although the relative weight of each stakeholder category differs between countries, the overall ecosystem structure reflects a common European innovation model in which businesses, academia, public authorities and intermediary organisations jointly support sectoral development.

Table 5: Comparative Stakeholder Landscape across the FashionKIC Regional Nodes

Stakeholder Category	Greece	Portugal	Romania	Spain
Fashion Designers & Creative Professionals	High	High	Moderate	High
SMEs & Fashion Brands	High	High	High	High
Textile & Apparel Manufacturers	Moderate	High	High	High
Universities & Higher Education Institutions	High	High	Moderate	High
Research & Technology Organisations	Moderate	High	Moderate	High
Innovation Hubs & Clusters	Moderate	High	Moderate	High
Business Support Organisations	High	High	Moderate	High
Public Authorities & Policy Organisations	High	High	High	High
NGOs & Civil Society Organisations	Moderate	Moderate	Low	Moderate

The comparative assessment indicates that SMEs represent the dominant stakeholder group across all four ecosystems, reflecting the structure of the European fashion and textile industry. Small and medium-sized enterprises constitute the principal drivers of regional economic activity, innovation and employment, while also representing the primary beneficiaries of ecosystem support mechanisms developed through FashionKIC.

Higher education institutions and research organisations also emerge as central ecosystem actors. Beyond their educational mission, universities increasingly facilitate applied research, entrepreneurship, skills development and technology transfer, strengthening regional innovation capacity. However, the intensity of collaboration between academia and industry varies among the participating countries, with Portugal and Spain exhibiting comparatively more established cooperation structures.

Manufacturing stakeholders display greater geographical variation. Portugal, Romania and Spain maintain extensive industrial production capacities and integrated textile value chains, while Greece demonstrates a comparatively stronger orientation towards design, creative entrepreneurship and SME-led innovation. These complementary characteristics provide significant opportunities for transnational collaboration and knowledge exchange across the FashionKIC network.

Innovation intermediaries—including clusters, business support organisations, incubators and regional development agencies—play an increasingly important role in connecting ecosystem actors. Their presence is particularly evident in Portugal and Spain, where structured cluster organisations facilitate cooperation between businesses, research institutions and public authorities. Greece has developed a growing network of innovation support organisations, while Romania continues to strengthen its regional innovation infrastructure through expanding institutional collaboration and participation in European initiatives.

Public authorities are consistently represented across all four ecosystems and contribute through policy development, funding programmes and regional innovation strategies. Nevertheless, the mapping suggests that their role is evolving from traditional regulatory functions towards more active facilitation of collaborative ecosystem development.

Table 6: Comparative Assessment of Stakeholder Collaboration

Collaboration Dimension	Greece	Portugal	Romania	Spain
Industry–Academia Collaboration	Moderate	High	Moderate	High
Public–Private Collaboration	Moderate	High	Moderate	High
Cluster-based Cooperation	Moderate	High	Moderate	High
Cross-sector Collaboration	Moderate	High	Moderate	High
SME Engagement	High	High	High	High
Participation in European Networks	Moderate	High	Moderate	High

The stakeholder mapping demonstrates that ecosystem performance is determined not solely by the number of organisations involved but by the quality of relationships established among them. Regions characterised by stronger collaboration mechanisms, active intermediary organisations and institutional coordination exhibit higher ecosystem maturity and greater capacity to support innovation.

Despite these positive characteristics, fragmentation remains a common challenge across the participating Regional Nodes. Collaboration is frequently project-based and dependent on individual initiatives rather than institutionalised governance structures. Knowledge exchange between research organisations and SMEs, particularly regarding digitalisation, sustainability and innovation uptake, remains uneven across several ecosystems.

The establishment of the FashionKIC Regional Nodes provides an opportunity to address these structural challenges by strengthening stakeholder connectivity, facilitating long-term cooperation and supporting the development of more integrated regional innovation ecosystems.

Comparative Synthesis

The cross-country stakeholder analysis confirms that the four participating ecosystems possess diverse yet highly complementary stakeholder communities. While differences exist in institutional maturity, industrial structure and innovation capacity, all Regional Nodes demonstrate a shared commitment to collaboration, sustainability and knowledge exchange. The mapping therefore suggests that the principal added value of FashionKIC lies not in creating new stakeholder communities, but in strengthening existing relationships, improving ecosystem connectivity and facilitating structured cooperation between complementary actors at both regional and European level.

3.5 Common Strengths and Ecosystem Assets

The comparative analysis of the four Regional Nodes reveals a number of common ecosystem strengths that provide a solid foundation for the implementation and long-term sustainability of the FashionKIC initiative. Despite differences in economic size, industrial structure and innovation maturity, the participating ecosystems demonstrate several complementary assets that collectively support the development of a resilient and innovation-driven European fashion and textile ecosystem.

A recurring finding across all Regional Nodes is the presence of a dynamic network of small and medium-sized enterprises (SMEs), which constitute the backbone of the regional fashion and textile value chains. These enterprises contribute significantly to regional employment, entrepreneurship and product innovation while demonstrating considerable adaptability to changing market conditions. Their flexibility and capacity to develop niche products, creative solutions and specialised manufacturing capabilities represent a key competitive advantage for the FashionKIC network.

Creativity and design excellence also emerge as shared ecosystem assets. Across all participating countries, designers, creative entrepreneurs and emerging fashion brands contribute to a vibrant innovation culture that combines traditional craftsmanship with contemporary design approaches. This creative capacity provides favourable conditions for experimentation, sustainable product development and the adoption of new business models aligned with the European Green Deal and circular economy principles.

The analysis further highlights the significant contribution of higher education institutions, research organisations and vocational education providers. Universities and research centres are increasingly acting as ecosystem enablers by supporting applied research, entrepreneurship, skills development and technology transfer. Their growing engagement with industry creates favourable conditions for strengthening innovation capacity and facilitating knowledge exchange throughout the FashionKIC network.

Another common strength identified across the participating Regional Nodes is the increasing institutional commitment to sustainability. National and regional authorities have progressively integrated sustainability objectives into innovation strategies, industrial policies and regional development programmes, encouraging businesses to adopt circular economy principles, resource-efficient production methods and digital technologies. Although implementation levels differ among countries, sustainability has clearly evolved into a shared strategic priority across the four ecosystems.

Finally, the mapping demonstrates a strong willingness among stakeholders to engage in collaborative initiatives. Businesses, educational institutions, research organisations, business support organisations and public authorities consistently recognise the importance of networking, knowledge exchange and cross-sector cooperation. This collaborative culture represents one of the most valuable assets for the successful establishment of the FashionKIC Regional Nodes and provides a strong basis for future transnational cooperation.

Table 7: Common Strengths Identified across the FashionKIC Regional Nodes

Ecosystem Strength	Greece	Portugal	Romania	Spain	Comparative Assessment
Strong SME base	✓	✓	✓	✓	Common characteristic across all ecosystems
Creative and design capacity	High	High	Moderate	High	Major driver of innovation and entrepreneurship
Manufacturing expertise	Moderate	High	High	High	Complementary industrial capabilities
Higher education and research capacity	High	High	Moderate	High	Strong knowledge generation potential
Business support ecosystem	High	High	Moderate	High	Important facilitator of innovation
Sustainability awareness	Moderate	High	Moderate	High	Increasingly embedded across all regions
Stakeholder willingness to collaborate	High	High	High	High	Strong basis for Regional Node development
Participation in European initiatives	Moderate	High	Increasing	High	Favourable conditions for international cooperation

Although the participating Regional Nodes differ in terms of industrial maturity and institutional capacity, the mapping clearly demonstrates that their strengths are largely complementary rather than competing. Spain and Portugal contribute extensive industrial expertise, well-established innovation infrastructures and strong international market orientation. Romania reinforces the network through its specialised manufacturing capacity and growing innovation ecosystem, while Greece contributes significant strengths in creative entrepreneurship, design, stakeholder mobilisation and emerging sustainability initiatives.

These complementary characteristics considerably enhance the collective capacity of the FashionKIC consortium. Rather than replicating similar competences across regions, the four ecosystems create a balanced European network capable of combining creativity, manufacturing excellence, research capacity, entrepreneurship and sustainability expertise.

Furthermore, the analysis indicates that many of these strengths are mutually reinforcing. Strong educational institutions support innovation; business support organisations facilitate entrepreneurship; creative industries stimulate product innovation; and sustainability policies encourage technological modernisation and new forms of collaboration. This interconnected ecosystem structure represents one of the principal assets upon which FashionKIC can build future collaborative activities.

3.6 Common Gaps and Challenges

While the ecosystem mapping highlights a broad range of strengths across the participating Regional Nodes, it also identifies several common structural challenges that continue to limit the competitiveness, resilience and innovation capacity of the European fashion and textile ecosystem. Although the intensity of these challenges varies across countries, the comparative analysis reveals recurring patterns that affect all participating regions and justify the need for coordinated action through the FashionKIC initiative.

One of the most significant findings concerns the fragmentation of regional innovation ecosystems. Across all participating countries, collaboration between businesses, higher education institutions, research organisations, public authorities and intermediary organisations remains uneven and is frequently dependent on project-based initiatives rather than permanent governance mechanisms. Although numerous organisations operate within each ecosystem, interactions among them are often informal, sector-specific or geographically limited, reducing opportunities for knowledge exchange and collaborative innovation.

A second common challenge relates to knowledge transfer and innovation uptake. The mapping indicates that research and educational institutions possess significant expertise in sustainability, digital technologies, design and advanced manufacturing; however, the translation of this knowledge into practical applications for SMEs remains inconsistent. Small and medium-sized enterprises, which constitute the majority of organisations within the sector, frequently encounter difficulties in accessing specialised expertise, innovation services and research outcomes that could support their competitiveness.

Skills development also emerges as a cross-cutting challenge. The transition towards circular business models, digital manufacturing, sustainable product development and data-driven value chains requires new competences that are not yet systematically available across the participating ecosystems. Although universities and vocational education providers are increasingly adapting their educational programmes, stronger cooperation with industry is required to ensure that training provision effectively responds to labour market needs.

The comparative assessment further highlights disparities in innovation capacity across the Regional Nodes. Portugal and Spain demonstrate comparatively mature innovation support systems, while Greece and Romania continue to strengthen institutional coordination and innovation infrastructure. These differences should not be interpreted as weaknesses but rather as opportunities for mutual learning and knowledge exchange within the FashionKIC network.

Finally, access to finance and specialised business support remains a recurring concern, particularly for SMEs and early-stage innovative enterprises. Stakeholders consistently identified the need for improved access to funding opportunities, mentoring, business

acceleration services and international networking activities that can facilitate business growth and innovation adoption.

Collectively, these findings indicate that many of the challenges identified through the ecosystem mapping are systemic rather than country-specific. Consequently, they require coordinated interventions that strengthen ecosystem connectivity, facilitate collaboration and promote knowledge exchange across regional and national boundaries.

Table 8: Common Ecosystem Gaps and Challenges across the FashionKIC Regional Nodes

Challenge	Greece	Portugal	Romania	Spain	Comparative Assessment
Ecosystem fragmentation	High	Moderate	High	Moderate	Common structural challenge affecting collaboration
Limited knowledge transfer between academia and industry	Moderate	Moderate	High	Moderate	Opportunity for stronger innovation partnerships
Skills gaps related to sustainability and digitalisation	High	Moderate	High	Moderate	Shared priority for capacity building
Limited SME access to innovation support	Moderate	Moderate	High	Moderate	Need for coordinated business support mechanisms
Uneven innovation ecosystem maturity	Moderate	Low	High	Low	Opportunity for peer learning between Regional Nodes
Access to finance and acceleration services	Moderate	Moderate	High	Moderate	Particularly relevant for SMEs and start-ups
Limited cross-sector collaboration	Moderate	Moderate	Moderate	Moderate	Need for stronger ecosystem integration
Internationalisation challenges for SMEs	Moderate	Moderate	High	Moderate	Scope for transnational cooperation

Challenge	Greece	Portugal	Romania	Spain	Comparative Assessment
					through FashionKIC

The comparative analysis demonstrates that the identified ecosystem gaps are closely interconnected. Fragmented stakeholder networks constrain knowledge transfer, which in turn limits innovation uptake among SMEs. Skills shortages further reduce the capacity of organisations to adopt digital and sustainable business models, while limited access to specialised business support and financing restricts opportunities for growth and internationalisation.

Importantly, the mapping suggests that these challenges should not be viewed solely as regional weaknesses but as common European issues affecting the transition of the fashion and textile sector. Their recurrence across all participating Regional Nodes reinforces the relevance of establishing a transnational ecosystem capable of facilitating collaboration, knowledge exchange and coordinated capacity building.

Rather than requiring isolated national interventions, the identified challenges call for integrated ecosystem solutions that connect stakeholders, strengthen institutional collaboration and promote the circulation of knowledge across regional boundaries. In this regard, the FashionKIC initiative provides an appropriate framework for addressing these common needs through shared methodologies, collaborative learning and joint innovation activities.

Key Findings

The comparative assessment identifies several recurring challenges shared by the four Regional Nodes:

- Fragmented stakeholder collaboration limits the efficiency of regional innovation ecosystems.
- Knowledge generated by universities and research organisations is not consistently transferred to SMEs.
- Skills shortages related to sustainability, digitalisation and innovation management remain evident across all ecosystems.
- SMEs require stronger access to business support services, mentoring and innovation infrastructure.
- Differences in ecosystem maturity create opportunities for peer learning and capacity building rather than competition.
- Strengthening ecosystem governance and stakeholder connectivity represents a strategic priority for the long-term success of FashionKIC.

Overall, the ecosystem mapping confirms that the challenges identified across the participating countries are largely systemic and interconnected. Addressing these issues through coordinated European action will be essential for strengthening regional

innovation ecosystems, enhancing stakeholder collaboration and supporting the sustainable transformation of the fashion and textile sector.

3.7 Opportunities for Collaboration between Regional Nodes

Building on the strengths and gaps identified in Sections 3.4 and 3.5, the analysis highlights several areas in which cross-node cooperation can respond to shared needs while drawing on the distinctive capabilities of Greece, Portugal, Romania and Spain. Table 9 summarises these priority collaboration areas and their potential added value for FashionKIC.

Table 9: Opportunities for Collaboration between the FashionKIC Regional Nodes

Collaboration Area	Greece	Portugal	Romania	Spain	Potential Added Value
Sustainable Fashion & Circular Economy	High	High	Moderate	High	Exchange of sustainable practices, circular business models and eco-design methodologies
Textile Manufacturing & Industrial Innovation	Moderate	High	High	High	Joint pilot projects, technology transfer and industrial collaboration
Entrepreneurship & SME Development	High	High	Moderate	High	Business mentoring, networking and internationalisation support
Skills Development & Capacity Building	High	High	High	High	Joint training programmes, workshops and knowledge exchange
Research & Innovation Collaboration	Moderate	High	Moderate	High	Collaborative research projects and innovation partnerships
Digital Transformation	Moderate	High	Moderate	High	Exchange of digital solutions and smart manufacturing practices
Stakeholder Engagement & Ecosystem Governance	High	High	Moderate	High	Shared methodologies for Regional Node management and stakeholder mobilisation

The mapping identifies several thematic areas where cooperation among the Regional Nodes can generate substantial added value. Sustainability and circular economy emerge as common priorities across all participating ecosystems, creating favourable conditions for the exchange of good practices related to sustainable materials, circular business models, product lifecycle management and responsible production processes.

Manufacturing and industrial innovation represent another important area of collaboration. Portugal, Romania and Spain possess complementary production capabilities, technological expertise and industrial networks that can support collaborative pilot actions, technology transfer and the adoption of innovative manufacturing processes. Greece contributes significant expertise in design-driven innovation, entrepreneurship and creative industries, enriching the collaborative potential of the network.

Entrepreneurship support and SME development also constitute common priorities across the four Regional Nodes. Given the predominance of SMEs within the fashion and textile sector, collaborative initiatives focusing on business mentoring, innovation management, market expansion and access to international networks can strengthen regional competitiveness while facilitating knowledge circulation throughout the consortium.

The comparative analysis further highlights the importance of joint capacity-building activities. Although educational institutions and research organisations are well represented across all participating countries, their expertise is distributed across different thematic areas. Coordinated training programmes, study visits, peer-learning activities and collaborative educational initiatives would therefore contribute to addressing common skills gaps while reinforcing stakeholder engagement across the network.

Research collaboration represents an additional opportunity for strengthening the European dimension of FashionKIC. Universities, technology centres and research organisations possess complementary scientific expertise that can support collaborative research, applied innovation and the development of new sustainable products, materials and digital solutions for the fashion and textile sector.

Comparative Assessment

Importantly, collaboration opportunities extend beyond technical cooperation. The ecosystem mapping demonstrates significant potential for strengthening governance practices, stakeholder participation, regional ecosystem management and policy dialogue. Such activities will contribute not only to the successful implementation of FashionKIC but also to the long-term sustainability of the Regional Nodes beyond the duration of the project.

3.8 Potential Synergies within FashionKIC

The collaboration opportunities identified in Section 3.6 translate into a set of strategic synergies for FashionKIC. Table 10 consolidates these synergies by linking existing Regional Node capacities with the expected added value for project implementation.

Table 10: Strategic Synergies Identified through the Ecosystem Mapping

Strategic Area	Contribution of the Regional Nodes	Expected Added Value for FashionKIC
Knowledge Exchange	Universities, research organisations and innovation intermediaries across all Regional Nodes	Strengthened transfer of knowledge, good practices and innovation methodologies
Capacity Building	Complementary educational expertise and stakeholder experience	Joint training programmes, peer learning and skills development
Collaborative Innovation	Design, manufacturing, digitalisation and sustainability expertise distributed across the consortium	Cross-border pilot projects and innovation partnerships
SME Support	Extensive SME networks in all participating countries	Shared mentoring, business support and internationalisation opportunities
Sustainability Transition	Common commitment to circular economy and sustainable production	Development of common sustainability approaches and tools
Ecosystem Governance	Regional Node coordination and stakeholder engagement mechanisms	Improved governance models and long-term ecosystem resilience

The ecosystem mapping highlights considerable potential for knowledge exchange across the consortium. Each Regional Node possesses specialised expertise that can contribute to the collective development of the FashionKIC community. Universities, research centres, innovation intermediaries and business support organisations represent important knowledge providers whose experience can be shared through collaborative activities, peer-learning initiatives and transnational networking.

Capacity building emerges as another strategic area of synergy. Although the participating ecosystems differ in terms of institutional maturity and industrial structure, they share common educational needs related to sustainability, digitalisation, entrepreneurship and innovation management. The development of coordinated training activities and shared educational resources therefore represents a significant opportunity for strengthening regional capabilities while promoting a common understanding of sustainable fashion innovation.

The comparative analysis also demonstrates strong potential for collaborative innovation. The complementary industrial profiles of the Regional Nodes create favourable conditions for the joint development of innovative products, services and business models. Combining creative expertise, manufacturing excellence, research

capacity and sustainability knowledge enables the consortium to address complex sectoral challenges through interdisciplinary and cross-border collaboration.

Support for SMEs represents another important area of synergy. Given that small and medium-sized enterprises constitute the backbone of all participating ecosystems, coordinated mentoring activities, business acceleration initiatives, networking opportunities and knowledge-sharing mechanisms have the potential to generate substantial benefits across the consortium. Such collaborative support structures can strengthen SME competitiveness while facilitating access to innovation, international partnerships and emerging market opportunities.

Furthermore, the ecosystem mapping confirms that all Regional Nodes are actively engaged in the sustainability transition. Although implementation levels vary among countries, the shared commitment to circular economy principles, responsible production and digital transformation creates favourable conditions for developing common methodologies, practical tools and collaborative initiatives that support the broader objectives of the European Green Deal.

Finally, the mapping identifies opportunities for strengthening ecosystem governance through the exchange of experiences related to stakeholder engagement, Regional Node coordination and collaborative decision-making. By sharing governance practices and ecosystem management approaches, the participating partners can contribute to the long-term sustainability of the FashionKIC network beyond the duration of the project.

Taken together, these synergies show how the ecosystem mapping can inform implementation beyond the regional level. Knowledge exchange, shared capacity building, collaborative innovation, SME support and governance exchange provide concrete mechanisms through which existing Regional Node capacities can be mobilised across the FashionKIC network. These findings provide the evidence base for the implementation-oriented recommendations presented in Chapter 5.

4. Country Ecosystem Mapping Reports

The following chapter presents the individual Country Ecosystem Mapping Reports for the four participating FashionKIC Regional Nodes: Greece, Portugal, Romania and Spain. Each report follows a common analytical structure, ensuring consistency and comparability across countries while reflecting the specific characteristics, priorities and stakeholder dynamics of each regional ecosystem. Together, these reports provide the detailed evidence underpinning the comparative analysis presented in Chapter 3 and establish the basis for the strategic recommendations discussed in Chapter 5.

4.1 Greece – Country Ecosystem Mapping Report

The Greek Regional Node represents a dynamic and evolving fashion and textile ecosystem that combines industrial heritage, creative entrepreneurship and increasing commitment to sustainability and innovation. While smaller in scale than some of the other participating Regional Nodes, Greece possesses distinctive competitive advantages derived from its cultural identity, unique natural resources and internationally recognised sustainable fashion brands. These characteristics position the country as an important contributor to the FashionKIC network and to the broader transition towards a more sustainable and innovation-driven European fashion ecosystem.

The ecosystem mapping undertaken within the framework of FashionKIC highlights both the strengths and structural challenges of the Greek fashion and textile sector. It identifies an ecosystem characterised by strong creative potential, a growing sustainability agenda and increasing stakeholder engagement, while also revealing opportunities to improve institutional coordination, knowledge transfer and collaboration between industry, academia and public authorities. The following sections present the main findings of the mapping and outline the strategic positioning of the Greek Regional Node within the FashionKIC initiative.

Greece has developed a fashion and textile ecosystem that combines manufacturing traditions with design excellence, cultural heritage and a growing orientation towards sustainable production. The sector comprises approximately 4,900 enterprises, employs more than 23,000 people and generates an annual turnover of approximately EUR 1.9 billion, while exports remain an important driver of sectoral competitiveness. Germany, Italy, Cyprus and Spain constitute some of the principal export destinations, reflecting the international orientation of Greek fashion and textile products.

4.1.1 Regional Ecosystem Profile

One of the defining characteristics of the Greek ecosystem is its combination of unique natural resources with contemporary fashion design. Greece remains one of the European Union's largest producers of cotton and the only Member State maintaining commercial silk production through the Soufli silk cluster in the Evros region. These raw materials increasingly support sustainable value chains and provide local fashion brands with a distinctive competitive identity based on traceability, craftsmanship and regional

heritage. Internationally recognised companies such as **ZEUS+DIONE**, **Ioanna Kourbela** and **Parthenis** demonstrate how traditional materials and cultural heritage can successfully be combined with contemporary design and international market positioning.

The ecosystem is geographically structured around two complementary centres. Athens constitutes the country's principal creative and commercial hub, concentrating designers, fashion brands, industry associations and policy organisations. In contrast, Central Macedonia and Thessaly host an important share of the country's manufacturing activities, educational institutions and upstream production assets, including cotton cultivation and textile manufacturing. While this geographical distribution provides regional diversity, it also contributes to fragmentation and reinforces the need for stronger coordination between ecosystem actors.

The stakeholder mapping identified a diverse range of organisations representing the main components of the regional innovation ecosystem. Public authorities, business support organisations and industry associations constitute the largest stakeholder group, followed by designers, higher education institutions, research organisations and SMEs. Although manufacturing stakeholders are comparatively fewer in number, they represent strategically important actors linked to the country's raw material production and industrial value chains. The ecosystem therefore demonstrates a balanced institutional composition capable of supporting collaborative innovation, provided that stronger connections between stakeholder groups are established.

Higher education institutions and research organisations further strengthen the ecosystem by providing expertise in fashion design, clothing technology, engineering, sustainability and business innovation. Institutions such as the International Hellenic University, the National Technical University of Athens, the Athens University of Economics and Business and the University of West Attica contribute to education, research and entrepreneurship activities relevant to the sector. However, unlike several other European fashion ecosystems, Greece currently lacks a dedicated textile technology and innovation centre capable of coordinating applied research, technology transfer and industrial innovation. This represents one of the principal structural characteristics identified through the mapping.

Table 11: Key Characteristics of the Greek Regional Ecosystem

Dimension	Evidence from the Mapping
Economic profile	Approximately 4,900 enterprises, 23,000 employees and €1.9 billion annual turnover
Core industrial assets	Cotton production, Soufli silk, apparel manufacturing and sustainable fashion
Main stakeholder groups	SMEs, designers, higher education institutions, research organisations, public authorities and business support organisations
Geographical concentration	Athens (creative industries) and Central Macedonia/Thessaly (manufacturing and education)

Dimension	Evidence from the Mapping
Innovation profile	Growing entrepreneurial ecosystem supported by universities and research organisations
Sustainability profile	Increasing adoption of circular economy principles and sustainable fashion initiatives

4.1.2 Ecosystem Analysis

The ecosystem mapping highlights that the Greek fashion and textile ecosystem possesses a combination of distinctive assets and structural challenges that collectively shape its current development trajectory. The analysis demonstrates that Greece is characterized by strong creative potential, internationally recognized sustainable fashion initiatives and valuable natural resources, while simultaneously facing institutional fragmentation, limited research infrastructure and relatively weak collaboration between key stakeholder groups. These findings provide important insights into the strategic positioning of the Greek Regional Node within the wider FashionKIC network.

One of the principal strengths identified through the mapping is the country's unique combination of cultural heritage and sustainable raw materials. Greece occupies a distinctive position within the European fashion ecosystem as one of the largest cotton producers in the European Union and the only Member State maintaining commercial silk production through the Soufli silk cluster. These resources provide significant opportunities for the development of transparent, locally sourced and sustainable value chains that combine environmental responsibility with cultural identity. Increasingly, fashion companies are integrating these materials into contemporary products, reinforcing the international visibility of Greek sustainable fashion.

A second major strength concerns the growing recognition of Greek sustainable fashion brands. Companies such as **ZEUS+DIONE**, **Ioanna Kourbela** and **Parthenis** demonstrate that local creativity, responsible production and cultural heritage can successfully compete within international markets. Their commercial success provides credible examples of sustainable entrepreneurship while strengthening the international reputation of the Greek fashion ecosystem. Together with an expanding community of emerging designers and innovative SMEs, these actors contribute to an ecosystem that increasingly combines creativity with sustainability-oriented business models.

The mapping also identifies an expanding innovation environment supported by universities, research organisations and entrepreneurship initiatives. The growing alignment of regional innovation strategies with sustainability and digital transformation, together with initiatives such as the Athens Fashion Hackathon and the activities of Fashion Revolution Greece, demonstrates increasing ecosystem readiness to support experimentation, knowledge exchange and collaborative innovation. These developments are further reinforced by improving macroeconomic conditions and the availability of European and national funding instruments targeting green and digital transition.

Despite these positive characteristics, the analysis reveals several structural gaps that continue to constrain ecosystem development. The most significant challenge concerns the absence of a dedicated textile technology and innovation centre capable of supporting applied research, technology transfer and industrial innovation. Compared with other participating Regional Nodes, Greece lacks a specialised institution equivalent to national textile technology centres operating elsewhere in Europe. This institutional gap reduces opportunities for coordinated research activities, limits participation in innovation projects and weakens connections between research organisations and industry.

A second major challenge relates to ecosystem fragmentation. The mapping demonstrates that designers, manufacturers, educational institutions, business support organisations and policy actors frequently operate independently, with collaboration often depending on individual projects or informal relationships rather than permanent coordination mechanisms. This fragmentation limits knowledge transfer, reduces opportunities for joint innovation and constrains the development of integrated regional value chains. Strengthening stakeholder connectivity therefore emerges as one of the principal priorities for the future Regional Node.

The ecosystem also faces significant challenges associated with the sustainability transition. Although awareness of circular economy principles is increasing, many SMEs continue to experience difficulties in responding to evolving European regulatory requirements related to sustainable product design, digital traceability and environmental reporting. Limited access to specialised expertise, financial resources and practical guidance further constrains the capacity of smaller businesses to adopt innovative and sustainable business models. These findings underline the importance of targeted capacity-building activities capable of supporting the sector's transition towards greater sustainability and competitiveness.

Alongside these challenges, the ecosystem mapping identifies several strategic opportunities that could significantly strengthen the long-term development of the Greek Regional Node. The implementation of the European Green Deal, the Ecodesign for Sustainable Products Regulation, the Digital Product Passport and other sustainability-related policy initiatives creates increasing demand for specialised knowledge, training and innovation support. At the same time, national funding programmes and European financial instruments provide favourable conditions for investment in digitalisation, circular economy solutions and sustainable entrepreneurship. Greece is therefore well positioned to leverage these policy developments in support of its fashion and textile ecosystem.

Furthermore, the country's strong tourism sector offers unique opportunities to connect sustainable fashion with cultural heritage, local craftsmanship and experiential consumption. By integrating fashion, tourism and regional identity, the Greek ecosystem can further strengthen its international positioning while creating new business opportunities for designers, SMEs and creative entrepreneurs. Cross-border collaboration within the FashionKIC network represents an additional opportunity, enabling Greek stakeholders to complement domestic capabilities through cooperation with partners possessing advanced manufacturing, research and innovation expertise.

Table 12: SWOT Summary of the Greek Regional Ecosystem

Strengths	Weaknesses
Strong creative and cultural identity	Fragmented ecosystem governance
Internationally recognised sustainable fashion brands	Absence of a dedicated textile technology and innovation centre
Unique natural resources (cotton and Soufli silk)	Limited collaboration between academia and industry
Growing entrepreneurial and sustainability ecosystem	Limited innovation support for SMEs
Increasing policy commitment to sustainability	Low preparedness for emerging EU sustainability regulations
Opportunities	Threats
EU Green Deal and Circular Economy policies	Increasing international competition
National and European funding programmes	Slow adoption of digital and sustainable practices
Growing demand for sustainable and heritage-based fashion	Limited investment capacity among SMEs
Tourism-fashion synergies	Skills shortages in sustainability and innovation
Cross-border collaboration through FashionKIC	Regulatory complexity for smaller enterprises

Overall, the ecosystem analysis demonstrates that Greece possesses significant assets capable of supporting the objectives of FashionKIC. Its combination of creativity, cultural heritage, sustainable raw materials and entrepreneurial dynamism provides a distinctive contribution to the emerging European Knowledge and Innovation Community. At the same time, addressing ecosystem fragmentation, strengthening institutional collaboration and enhancing innovation support for SMEs will be essential for unlocking the full potential of the Greek Regional Node. The opportunities identified through the mapping therefore reinforce the strategic importance of coordinated actions that connect regional stakeholders, facilitate knowledge exchange and accelerate the transition towards a more sustainable and innovation-driven fashion ecosystem.

4.1.2.1 Thematic Focus: Emerging Designers and Entrepreneurial Initiatives in Greece

Beyond the internationally established brands identified in Section 4.1.1, the stakeholder mapping reveals a younger generation of Greek designers and micro-brands building on the same combination of cultural heritage, natural materials and sustainability that characterises the wider ecosystem. Athens-based labels such as 3QUARTERS and Vathos Apparel apply circular design principles and certified sustainable materials (GOTS, Oeko-Tex) to their collections, while Ancient Kallos and Yiorgos Eleftheriades combine biodegradable and eco-friendly fabrics with design narratives rooted in Greek identity

and international visibility, having shown in Milan, Paris and Barcelona. Newer accessories and lifestyle micro-brands, including ODE2Sucks, Callista Crafts and Sirene Egeenne, further illustrate the breadth of the emerging designer community, several of which already engage with EU-facing mechanisms such as the Enterprise Europe Network. This emerging pipeline is reinforced by a growing design-education base, with AAS College's MA in Fashion Design, the International Hellenic University's Department of Creative Design and Clothing, and Mediterranean College's BA in Fashion Design and Marketing training the next generation of practitioners, while platforms such as Athens Xclusive Designers Week provide a shared showcase for established and emerging talent alike.

Entrepreneurial activity in the Greek fashion and textile sector is supported by several national instruments identified through the mapping, including the ESPA 2021–2027 Competitiveness Programme, the Elevate Greece startup registry, LIFE-IP CEI-Greece for circular-economy ventures, and the Enterprise Europe Network for cross-border partnerships, although none of these mechanisms are sector-specific to fashion. Within this landscape, Envolve brings a directly relevant track record as one of Greece's longest-running entrepreneurship support organisations. Since 2012, Envolve Award Greece has funded and mentored dozens of early-stage Greek ventures, including several from the fashion and accessories space: ZEUS+DIONE's Concept Store initiative, a 2014 finalist that extended the brand into a platform for other Greek designers and craftsmen; designer handbag brand Kooreloo, a 2017 finalist now stocked internationally, including at Saks Fifth Avenue; and customisable fine-jewellery brand Mojools, whose patent-pending mechanism allows clients to attach removable ornaments to rings, bracelets, pendants and earrings, a 2020 award winner. These cases demonstrate that, while Greece does not currently have a fashion-dedicated incubator, Envolve has direct, hands-on experience supporting design-led founders through funding, mentorship and business support.

This experience is most directly relevant today through EnvolveXL, Envolve's current flagship acceleration programme, which supports 20 Greek-based or Greek-founded startups annually through a four-month programme combining expert-led courses, advisory board mentorship, investor networking and demo days, with a thematic focus on the digital and sustainable transformation of the economy. Emerging fashion and textile ventures with a sustainability or digital dimension are already eligible under this scope, positioning EnvolveXL as a concrete, existing channel through which Greek fashion entrepreneurs identified could access funding and mentorship, even in the absence of a dedicated fashion vertical. Taken together, the designer pipeline, the entrepreneurial support landscape and Envolve's own accelerator experience reinforce the strategic positioning of the Greek Regional Node as an ecosystem connector, with a specific capacity to channel emerging designers and entrepreneurs identified through this mapping toward existing funding, mentorship and networking mechanisms.

4.1.3 Collaboration and Strategic Positioning

The ecosystem mapping demonstrates that, despite its structural challenges, the Greek Regional Node benefits from an increasingly active network of organisations capable of supporting collaboration, innovation and sustainable transformation within the fashion and textile sector. Existing partnerships among industry associations, higher education institutions, research organisations, business support organisations and sustainability initiatives provide a solid foundation upon which the FashionKIC Regional Node can build future activities.

The Greek ecosystem already includes several well-established organisations that contribute to stakeholder engagement and ecosystem development. Industry associations such as the **Hellenic Fashion Industry Association (SEPEE)**, the **Hellenic Clothing Industry Association (HCIA)** and the **Hellenic Fashion Designers Association (HFDA)** play an important role in representing businesses and designers, facilitating dialogue with public authorities and supporting the internationalisation of the sector. At the same time, platforms such as **Athens Xclusive Designers Week (AXDW)** and the **Athens Fashion Trade Show** provide established mechanisms for visibility, networking and business development, creating opportunities to engage designers, SMEs and manufacturers within a common ecosystem framework.

An equally important component of the collaboration landscape is the growing role of sustainability-focused organisations. **Fashion Revolution Greece** has emerged as one of the country's leading initiatives promoting circular fashion, responsible production and stakeholder collaboration. Through activities such as the Athens Fashion Hackathon and partnerships with universities and research organisations, it has demonstrated the potential of collaborative innovation formats capable of bringing together designers, researchers, entrepreneurs and public stakeholders. These initiatives illustrate the growing maturity of the Greek ecosystem and provide valuable experience that can be further strengthened through the FashionKIC network.

Public institutions and business support organisations also contribute to the ecosystem through funding opportunities, innovation programmes and international networking mechanisms. National funding instruments under the **ESPA 2021–2027** framework, together with initiatives such as **Elevate Greece** and the **Enterprise Europe Network**, create favourable conditions for SME development, international collaboration and participation in European innovation projects. Although these support mechanisms already exist, the mapping indicates that stronger coordination and improved accessibility remain necessary to maximise their impact on the fashion and textile ecosystem.

The comparative assessment undertaken in Chapter 3 demonstrated that Greece possesses complementary capabilities in relation to the other Regional Nodes. While Portugal and Spain contribute advanced industrial ecosystems and innovation infrastructures, and Romania provides extensive manufacturing expertise, Greece offers significant strengths in creative entrepreneurship, sustainable design, stakeholder mobilisation and the integration of cultural heritage into contemporary fashion. These

characteristics position the Greek Regional Node as an important contributor to collaborative learning, sustainable innovation and creative experimentation within the FashionKIC consortium.

Table 13: Strategic Positioning of the Greek Regional Node within FashionKIC

Strategic Dimension	Contribution of the Greek Regional Node
Creative industries	Strong design culture supported by internationally recognised fashion brands
Sustainable materials	European cotton production, Soufli silk and traditional craftsmanship
Entrepreneurship	Dynamic SME ecosystem and growing start-up community
Education and research	Universities and research organisations supporting sustainability and innovation
Stakeholder engagement	Active industry associations, business support organisations and sustainability initiatives
European cooperation	Strong potential for knowledge exchange and cross-border collaboration within FashionKIC

The ecosystem mapping further indicates that the primary role of the Greek Regional Node should be that of an **ecosystem connector**. Given the fragmented nature of the national fashion and textile ecosystem, the Regional Node can facilitate stronger collaboration between designers, manufacturers, higher education institutions, research organisations, public authorities and business support organisations. In doing so, it can strengthen knowledge exchange, improve access to innovation services and contribute to the development of a more integrated regional innovation ecosystem.

From a strategic perspective, the mapping identifies four priority areas for the future development of the Greek Regional Node. First, strengthening stakeholder connectivity through structured networking and collaborative governance mechanisms will be essential for reducing ecosystem fragmentation. Second, targeted capacity-building initiatives should support SMEs and designers in responding to the sustainability and digital transition requirements emerging from European legislation and market developments. Third, the node should capitalise on Greece's distinctive cultural identity, sustainable raw materials and internationally recognised brands to reinforce the country's positioning within the European sustainable fashion ecosystem. Finally, greater participation in transnational initiatives and cross-border knowledge exchange should enable Greek stakeholders to access complementary expertise, strengthen innovation capacity and contribute more actively to the development of the wider FashionKIC community.

Overall, the ecosystem mapping confirms that the Greek Regional Node possesses the institutional foundations, stakeholder diversity and strategic assets necessary to become an active contributor to the FashionKIC initiative. While addressing structural weaknesses remains an important priority, the country's combination of creative excellence, entrepreneurial potential and sustainability-oriented innovation provides a

strong basis for supporting the objectives of the project and contributing to the long-term development of a more connected, resilient and competitive European fashion ecosystem.

4.2 Portugal – Country Ecosystem Mapping Report

The Portuguese Regional Node represents one of the most mature industrial ecosystems within the FashionKIC consortium, combining internationally recognised textile and clothing manufacturing capabilities with a growing culture of design, sustainability and technological innovation. Portugal has established itself as a leading European textile producer, supported by a highly export-oriented industry, specialised research centres, vocational education providers and a favourable policy environment promoting circular economy and industrial transition.

The ecosystem mapping highlights that Portugal's principal strength lies not only in its manufacturing excellence but also in its ability to connect industry, education, research and innovation. At the same time, the analysis identifies the need for stronger integration between creative designers, SMEs, technology providers and policy actors. Within the FashionKIC framework, the Portuguese Regional Node is therefore strategically positioned to act as a connector between industrial excellence and sustainable innovation, while facilitating collaboration across the wider European fashion ecosystem.

4.2.1 Regional Ecosystem Profile

Portugal offers one of the strongest industrial ecosystems among the participating Regional Nodes. The national textile and clothing sector remains a significant contributor to the country's economy, accounting for approximately **3% of GDP**, with nearly **15,000 companies**, around **160,000 employees** and textile and apparel exports exceeding **EUR 5.5 billion** in 2024. Representing approximately **7% of national exports**, the sector demonstrates strong international competitiveness, with Spain, France, Germany and Italy constituting its principal export markets. These indicators confirm Portugal's role as one of Europe's most important manufacturing and export hubs for textiles and apparel.

Unlike ecosystems primarily driven by fashion design, Portugal combines advanced manufacturing with increasing investments in sustainability, technical textiles and industrial innovation. Its comparative advantage lies in a highly specialised industrial base characterised by technical know-how, flexible production systems, export capacity and the continuous adoption of advanced manufacturing technologies. These strengths are complemented by an active design community, supported by ModaLisboa, independent designers, creative SMEs and cultural institutions that enhance the international visibility of Portuguese fashion.

The stakeholder mapping identified a highly diversified ecosystem, with strong representation across all stakeholder categories, including designers, SMEs, manufacturers, education and research institutions, as well as policy and support

organisations. Particularly noteworthy is the extensive industrial stakeholder base, which includes internationally recognised companies such as **Tintex**, **Riopele**, **Valérius**, **TMG Textiles**, **Lameirinho** and **Impetus Group**. These organisations contribute advanced manufacturing expertise, sustainability leadership and technological innovation, positioning Portugal as a valuable knowledge provider within the FashionKIC network.

Portugal also benefits from one of the strongest education and innovation infrastructures among the participating countries. Institutions such as the **University of Minho**, **CITEVE**, **2C2T** and **MODATEX** provide specialised expertise in textile engineering, applied research, testing, vocational education and technology transfer. Their close interaction with industry strengthens the ecosystem's innovation capacity and facilitates the practical implementation of sustainability and digitalisation initiatives. This integrated knowledge infrastructure represents a major comparative advantage of the Portuguese Regional Node.

The policy environment further reinforces ecosystem development. National strategies addressing circular economy, carbon neutrality, industrial modernisation and competitiveness create favourable conditions for innovation and sustainable growth. Organisations such as **ATP**, **ANIVCE**, **AICEP**, **ANI**, **IAPMEI** and **COMPETE 2030** provide institutional support through funding, internationalisation, innovation programmes and business development initiatives, contributing to a coherent policy framework aligned with European sustainability priorities.

Table 14: Key Characteristics of the Portuguese Regional Ecosystem

Dimension	Evidence from the Mapping
Economic profile	Approximately 15,000 companies, 160,000 employees and EUR 5.576 billion in exports
Core industrial assets	Advanced textile manufacturing, technical textiles, export-oriented production
Main stakeholder groups	Manufacturers, SMEs, designers, research centres, universities and policy organisations
Innovation profile	Strong science-industry collaboration led by CITEVE, University of Minho and MODATEX
Sustainability profile	High alignment with circular economy, industrial decarbonisation and digital transition policies
International orientation	Strong export performance and active participation in European innovation initiatives

4.2.2 Ecosystem Analysis

The ecosystem mapping confirms that Portugal possesses one of the most mature and well-integrated fashion and textile ecosystems among the participating Regional Nodes. Its long-standing manufacturing tradition, internationally competitive export sector, specialised research infrastructure and growing commitment to sustainability provide a

strong foundation for innovation and industrial transition. At the same time, the analysis identifies several structural challenges related to ecosystem integration, knowledge transfer and the practical implementation of sustainability by SMEs and creative businesses. These findings reinforce Portugal's strategic role within FashionKIC as a Regional Node capable of connecting industrial excellence with innovation and sustainable development.

One of the principal strengths of the Portuguese ecosystem is its internationally recognised textile and clothing manufacturing industry. Portugal has successfully positioned itself as a European leader in high-quality textile production, combining advanced manufacturing capabilities with flexibility, technical expertise and export competitiveness. Companies such as **Riopele**, **Tintex**, **Valérius**, **TMG Textiles**, **Lameirinho** and **Impetus Group** illustrate the sector's ability to integrate technological innovation, sustainable production practices and international market orientation. This industrial capacity represents a major strategic asset for the FashionKIC network, particularly in relation to pilot projects, industrial experimentation and technology transfer.

Another important strength is the country's highly developed knowledge and innovation infrastructure. Portugal benefits from the presence of specialised institutions such as **CITEVE**, **2C2T**, the **University of Minho** and **MODATEX**, which collectively provide applied research, textile engineering expertise, testing facilities, vocational education and industry-oriented innovation services. The close collaboration between these organisations and industrial stakeholders has created a favourable environment for research translation and technological adoption, distinguishing Portugal from many other European fashion ecosystems.

The mapping also highlights the complementary role of the Portuguese creative sector. Through organisations such as **ModaLisboa**, together with an active community of independent designers and emerging fashion brands, Portugal has developed a visible design culture that enhances the international image of the national fashion industry. Rather than operating separately from manufacturing, the creative sector increasingly contributes to sustainable product development, material experimentation and the promotion of circular design practices. This interaction between creativity and industrial production constitutes one of the ecosystem's most distinctive characteristics.

Despite these considerable strengths, the ecosystem mapping identifies several important challenges. The principal limitation is not the lack of organisations or institutional capacity, but the insufficient integration between different stakeholder groups. Although strong industrial, educational and policy actors exist, collaboration across the entire fashion value chain remains uneven. Designers, manufacturers, SMEs, research organisations and public institutions frequently operate within parallel networks, reducing opportunities for interdisciplinary innovation and coordinated ecosystem development. Strengthening these connections therefore emerges as one of the main priorities for the Portuguese Regional Node.

Another significant challenge concerns the translation of sustainability and digital transition policies into practical solutions for SMEs and creative businesses. While

Portugal benefits from an ambitious policy framework supporting circular economy, carbon neutrality and industrial modernisation, many smaller enterprises continue to face difficulties in understanding and implementing increasingly complex regulatory requirements, including digital product passports, traceability systems and sustainability reporting. The mapping indicates that many businesses require practical guidance, accessible tools and tailored capacity-building activities rather than additional policy information.

The ecosystem analysis further identifies substantial opportunities for future development. Portugal's combination of manufacturing excellence, specialised research centres and design culture creates favourable conditions for developing innovative solutions related to sustainable materials, circular production, production intelligence, digitalisation and industrial decarbonisation. These thematic areas closely align with European policy priorities and position the Portuguese ecosystem as an ideal environment for piloting new approaches within the FashionKIC framework.

The mapping also underlines the importance of strengthening links between education, research and business. Existing institutions already provide high-quality education and technical expertise; however, closer collaboration with SMEs, designers and manufacturers would enhance the practical relevance of training programmes and accelerate the adoption of innovation throughout the sector. Furthermore, the international visibility of ModaLisboa offers valuable opportunities to disseminate project results, engage stakeholders and promote sustainable fashion narratives at both national and European levels.

Table 15: SWOT Summary of the Portuguese Regional Ecosystem

Strengths	Weaknesses
Internationally competitive textile and clothing industry	Fragmentation between industrial, creative and policy actors
Strong export-oriented manufacturing base	Limited integration across the fashion value chain
Advanced research and technology infrastructure (CITEVE, 2C2T, University of Minho, MODATEX)	SMEs require greater support for sustainability implementation
Strong design culture and international visibility through ModaLisboa	Limited accessibility of technical knowledge for smaller businesses
High policy alignment with EU sustainability priorities	Uneven collaboration between education, industry and creative communities
Opportunities	Threats
Circular economy and industrial decarbonisation	Increasing global competition in textile manufacturing
Sustainable materials and technical textiles	Rising regulatory complexity for SMEs

Strengths	Weaknesses
Digital Product Passport and traceability solutions	Skills shortages in digital and sustainability competences
Cross-sector collaboration between design and manufacturing	Pressure to maintain competitiveness while investing in sustainability
European cooperation through FashionKIC	Rapid technological change requiring continuous investment

The ecosystem analysis confirms that Portugal is characterised by a highly competitive industrial ecosystem supported by advanced research capacity, specialised education and a favourable policy environment for sustainable transition. The country's principal comparative advantage lies in its ability to combine manufacturing excellence with innovation, creating strong conditions for experimentation, technology transfer and collaborative learning.

At the same time, the mapping demonstrates that future ecosystem development will depend on stronger integration between designers, manufacturers, SMEs, research organisations and public institutions. By addressing these coordination challenges and translating sustainability and digital transition priorities into practical support for businesses, the Portuguese Regional Node can play a central role within FashionKIC, contributing both industrial expertise and innovation capacity to the wider European Knowledge and Innovation Community.

4.2.2.1 Regional Specialisation – Traditional Craftsmanship and Contemporary Design

Portugal's regional specialisation within FashionKIC lies in the intersection between traditional craftsmanship and contemporary design. This is a relevant positioning because the Portuguese ecosystem combines long-standing textile, clothing and craft-based knowledge with a visible contemporary fashion scene, a strong manufacturing base and growing interest in sustainability, circularity and material innovation.

Traditional craftsmanship in Portugal is not only a cultural asset, but also a source of technical knowledge, material intelligence and place-based production practices. Craft-based skills linked to textiles, knitwear, wool, weaving, embroidery, leather goods, footwear, cork, basketry and small-scale making can inform more sustainable approaches to design, production and product value. These practices often carry knowledge about durability, repair, material use, local identity and slower production rhythms, which are highly relevant to circular fashion debates.

Contemporary Portuguese design adds another layer to this specialisation. Designers and creative brands in the mapping — including independent designers and SMEs — contribute experimentation, cultural visibility, public engagement and narrative capacity. They can translate sustainability and material innovation into products, collections, campaigns, learning formats and public-facing events. This ensures that FashionKIC in Portugal does not become purely industrial or institutional, but remains connected to fashion culture, creative practice and market-facing design.

The value of this specialisation lies precisely in connecting both dimensions. Traditional craftsmanship can support contemporary design through material knowledge, local skills, heritage techniques and alternative production logics; contemporary design can renew the relevance of craft through experimentation, visibility, new audiences, sustainability narratives and collaborations with industry and education. For FashionKIC, this creates strong potential for workshops, design-industry dialogues, training activities, case studies, circular design exercises, material experimentation, storytelling formats and small pilot projects.

In practical terms, the Portuguese node can use this specialisation to build bridges between designers, craftspeople, manufacturers, education providers, vocational training institutions, support organisations and policy actors. It can also generate inputs for several Work Packages: WP1 through user profiles and use cases around materials, traceability and design decision-making; WP2 through node positioning and stakeholder engagement; WP3 through training examples and applied learning activities; WP4 through design-driven innovation and acceleration opportunities; WP5 through links to regional development, cultural heritage, circular economy and smart specialisation; and WP6 through strong communication narratives rooted in Portuguese design culture, craftsmanship and sustainable transition.

4.2.3 Collaboration and Strategic Positioning

The ecosystem mapping demonstrates that Portugal already possesses a robust network of institutions capable of supporting innovation, skills development and industrial transition within the fashion and textile sector. Rather than lacking supporting structures, the Portuguese ecosystem is characterised by a rich but partially fragmented landscape of industrial actors, research organisations, education providers and public institutions. Consequently, the principal role of the Portuguese Regional Node is not to create new structures, but to strengthen coordination, facilitate collaboration and enhance knowledge exchange among existing ecosystem actors.

The collaboration landscape is anchored by several nationally recognised organisations that collectively support research, innovation, vocational education and industrial competitiveness. **CITEVE** functions as Portugal's leading technological centre for the textile and clothing industries, providing applied research, testing services, sustainability expertise and technology transfer. Complementing this role, the **University of Minho** and **2C2T** contribute internationally recognised research capacity in textile engineering, advanced materials and industrial innovation, while **MODATEX** serves as the country's principal vocational education provider for the textile, clothing and fashion industries. Together, these organisations establish a comprehensive knowledge ecosystem that effectively connects education, research and industrial practice.

Industry associations and policy organisations further reinforce this collaborative environment. **ATP**, **ANIVEC/ModaPortugal**, **AICEP**, **ANI**, **IAPMEI**, **COMPETE 2030** and regional development authorities contribute through business support, internationalisation services, innovation funding and policy implementation. These institutions provide favourable conditions for strengthening stakeholder engagement

and supporting the sustainable transformation of the sector. Nevertheless, the mapping indicates that stronger coordination among these organisations would improve accessibility for SMEs and facilitate more integrated ecosystem development.

An equally important collaborative asset is the role of **ModaLisboa**, which extends beyond its function as a fashion event organiser. Through its long-standing engagement with designers, creative professionals, educational institutions and international partners, ModaLisboa has established itself as a recognised platform for knowledge exchange, experimentation and stakeholder mobilisation. Within FashionKIC, this convening capacity creates valuable opportunities to connect creative industries with manufacturing, research and sustainability initiatives, ensuring that innovation remains closely linked to both industrial realities and contemporary fashion culture.

The comparative analysis presented in Chapter 3 demonstrated that Portugal occupies a distinctive position within the FashionKIC consortium. While all Regional Nodes contribute complementary capabilities, Portugal offers particular strengths in advanced manufacturing, applied research, technical textiles and vocational education. These characteristics position the Portuguese Regional Node as a key contributor to collaborative innovation activities, industrial pilot actions and capacity-building initiatives that support the green and digital transition of the European fashion ecosystem.

Table 16: Strategic Positioning of the Portuguese Regional Node within FashionKIC

Strategic Dimension	Contribution of the Portuguese Regional Node
Advanced manufacturing	Internationally competitive textile and apparel production with strong export orientation
Research and innovation	CITEVE, 2C2T and the University of Minho providing applied research and technology transfer
Vocational education	MODATEX as the leading provider of specialised training for the textile and fashion sector
Sustainability transition	Expertise in circular economy, technical textiles, industrial decarbonisation and sustainable manufacturing
Stakeholder engagement	Strong collaboration between industry associations, research centres and policy organisations
European cooperation	Extensive participation in European projects and cross-border innovation initiatives

The mapping identifies four strategic priorities for the Portuguese Regional Node within FashionKIC. First, the node should strengthen collaboration across the fashion value chain by creating structured connections between designers, manufacturers, research organisations, education providers and policy actors. Second, it should translate sustainability and digital transition policies into practical services, guidance and tools that respond directly to the needs of SMEs and creative businesses. Third, the node should leverage Portugal's internationally recognised manufacturing expertise to

support collaborative pilot projects, industrial experimentation and technology transfer across the consortium. Finally, it should enhance the visibility of Portuguese innovation by facilitating participation in European knowledge exchange activities, reinforcing the country's contribution to the broader FashionKIC community.

Overall, the ecosystem mapping confirms that Portugal possesses the institutional capacity, industrial expertise and collaborative culture required to become one of the principal implementation hubs within FashionKIC. By acting as a connector between manufacturing excellence, research, education and creative industries, the Portuguese Regional Node can significantly contribute to the development of a more integrated, innovative and sustainable European fashion ecosystem while simultaneously strengthening regional competitiveness and stakeholder engagement.

4.3 Romania – Country Ecosystem Mapping Report

The Romanian Regional Node represents a manufacturing-oriented fashion and textile ecosystem with significant industrial expertise, a strong export base and increasing commitment to sustainability and digital transformation. While the sector has traditionally been characterised by production-focused activities within European value chains, the ecosystem is progressively evolving towards higher-value activities, including innovation, circular economy practices, product development and collaborative research.

The ecosystem mapping highlights Romania's considerable industrial capacity, particularly within the North-East Region, where specialised manufacturing, education and research institutions create favourable conditions for ecosystem development. At the same time, the analysis identifies fragmentation, limited collaboration mechanisms and the need for stronger links between production, design, research and business development. Within the FashionKIC framework, the Romanian Regional Node is therefore positioned to support the transition from a manufacturing-based ecosystem towards a more integrated, innovation-driven and sustainable regional fashion ecosystem.

4.3.1 Regional Ecosystem Profile

Romania maintains an important position within the European textile and apparel industry through its strong manufacturing base, export capacity and extensive industrial experience. Manufacturing contributes approximately **14% of national GDP**, while the textile and fashion sector accounts for around **6% of manufacturing value added**. Textile and apparel exports reached approximately **EUR 5.1 billion** in 2024, with Italy, Germany and France representing the principal export destinations. These figures confirm the strategic importance of the sector for national industrial competitiveness and employment.

The North-East Region occupies a particularly significant position within the national ecosystem. The region hosts more than **1,000 active textile and clothing companies** and has traditionally been recognised as one of Romania's leading textile production centres.

It combines manufacturing expertise with specialised education, research capacity and regional support structures, including the **Faculty of Industrial Design and Business Management at the Gheorghe Asachi Technical University of Iași (TUIASI)**, the **ASTRICO North-East Textile Cluster**, **CANEPARO**, **Reginnova NE** and several vocational education institutions. Together, these organisations provide an important regional foundation for industrial innovation and skills development.

The ecosystem mapping identifies a balanced stakeholder landscape consisting of manufacturers, fashion SMEs, designers, research institutions, universities, circular economy organisations and business support structures. Manufacturing companies continue to represent the industrial backbone of the ecosystem, while designers, SMEs and creative businesses increasingly contribute to product innovation and market diversification.

Education and research institutions further reinforce the ecosystem through specialised expertise in textile engineering, industrial design, applied research and sustainable product development. Organisations such as **TUIASI**, **UNAGE Iași**, the **National Research and Development Institute for Textiles and Leather (INCDTP)** and the **National University of Arts Bucharest** support knowledge generation, technology transfer and skills development while creating stronger links between academia and industry. Their contribution is increasingly complemented by circular economy initiatives, innovation hubs and community organisations promoting sustainable fashion, textile reuse and digital innovation.

Romanian companies are also demonstrating increasing awareness of sustainability and digital transformation. More than half of the mapped companies report the use of digital technologies and sustainability-oriented practices, including digital sampling, low-volume production, deadstock utilisation, recyclable packaging, repair services and natural fibres. Although these initiatives remain unevenly distributed across the ecosystem, they indicate a growing readiness to respond to emerging European requirements related to circular economy, traceability and sustainable product development.

Table 17: Key Characteristics of the Romanian Regional Ecosystem

Dimension	Evidence from the Mapping
Economic profile	Manufacturing contributes approximately 14% of GDP; textile exports exceed EUR 5.1 billion
Core industrial assets	Large manufacturing base, export-oriented production and technical expertise
Main stakeholder groups	Manufacturers, SMEs, designers, universities, research institutes, circular economy organisations
Innovation profile	Strong regional education and research supported by TUIASI, INCDTP and innovation organisations
Sustainability profile	Increasing adoption of digital technologies, circular practices and traceability initiatives

Dimension	Evidence from the Mapping
Regional specialisation	North-East Romania as one of the country's leading textile production regions

4.3.2 Ecosystem Analysis

The ecosystem mapping demonstrates that Romania possesses a well-established industrial foundation capable of supporting the transition towards a more sustainable, innovative and competitive fashion and textile ecosystem. The analysis highlights a combination of manufacturing expertise, emerging sustainability practices and specialised educational capacity, while also identifying structural challenges related to ecosystem integration, innovation uptake and value creation. Collectively, these findings position the Romanian Regional Node as a key contributor to the FashionKIC network, particularly in relation to manufacturing innovation and industrial transformation.

One of the most significant strengths identified through the mapping is Romania's long-standing manufacturing tradition. Romanian textile and apparel companies have accumulated considerable experience through their participation in European and international value chains, developing advanced production capabilities, quality management systems and technical expertise. This industrial know-how provides a strong platform for the adoption of new technologies, sustainable manufacturing practices and higher-value production models. In particular, the concentration of manufacturing activities within the North-East Region creates favourable conditions for regional cooperation and industrial innovation.

A second major strength concerns the diversity of the ecosystem itself. The mapping identified manufacturers, SMEs, designers, universities, research institutes, clusters, circular economy organisations and business support structures, creating a broad institutional base capable of supporting innovation and collaboration. Organisations such as **ASTRICO North-East**, **Reginnova NE**, **CANEPARO**, **INCDTP**, **TUIASI** and **UNAGE Iași** provide complementary expertise in research, education, industrial development and sustainability. This diversity represents a valuable asset that can facilitate interdisciplinary cooperation and strengthen the ecosystem's capacity for innovation.

The analysis also demonstrates increasing awareness of sustainability and digital transformation across the Romanian fashion and textile sector. Many companies have already introduced circular economy practices, including the use of deadstock materials, repair services, recyclable packaging, digital sampling and low-volume production. Furthermore, growing familiarity with European initiatives such as the Ecodesign for Sustainable Products Regulation (ESPR) and the Digital Product Passport (DPP) reflects a positive shift towards compliance with emerging sustainability requirements. Although implementation remains uneven, these developments indicate that the ecosystem has already begun its transition towards more sustainable production models.

Despite these positive developments, the mapping identifies several structural bottlenecks that continue to constrain ecosystem development. The most significant challenge concerns the fragmentation of stakeholder collaboration. Although numerous

organisations operate within the ecosystem, cooperation often remains project-based or informal, limiting opportunities for coordinated innovation, shared infrastructure and long-term strategic planning. Stronger collaboration between manufacturers, designers, research organisations and business support structures therefore emerges as a key priority for the Regional Node.

Another important challenge relates to the continued dependence of many companies on **Lohn** and **Cut-Make-Trim (CMT)** production models. While these business models have enabled Romanian manufacturers to remain integrated within European supply chains, they also restrict opportunities for higher value creation through branding, product development, design ownership and innovation. Supporting companies in moving towards higher-value activities therefore represents an important strategic objective for the Romanian ecosystem.

The mapping further highlights disparities in digital and circular readiness among SMEs. While some enterprises have already invested in advanced technologies and sustainability practices, others continue to face barriers associated with investment costs, limited technical expertise, insufficient digital skills and uncertainty regarding future regulatory requirements. The absence of widely accessible shared facilities for textile collection, material testing, prototyping and circular innovation further constrains the capacity of SMEs to implement sustainable solutions independently. These findings underline the importance of collaborative support mechanisms capable of facilitating knowledge transfer and practical experimentation.

The ecosystem mapping also identifies significant opportunities for future development. Romania possesses favorable conditions for expanding activities related to digital prototyping, sustainable product development, circular business models, textile recycling, and waste valorization and traceability solutions. These opportunities align closely with European policy priorities while simultaneously responding to the evolving needs of the national manufacturing sector. Moreover, stronger collaboration between manufacturers, designers, research organisations and educational institutions could accelerate innovation, improve product differentiation and support the transition towards more competitive business models.

Table 18: SWOT Summary of the Romanian Regional Ecosystem

Strengths	Weaknesses
Strong manufacturing expertise and export-oriented production	Fragmented stakeholder collaboration
Extensive industrial know-how and skilled workforce	Continued dependence on Lohn/CMT production models
Strong education and research institutions	Uneven digital and circular readiness among SMEs
Growing adoption of sustainable production practices	Limited shared infrastructure for innovation and circularity

Strengths	Weaknesses
Diverse ecosystem including clusters, research institutes and circular economy organisations	Limited knowledge transfer between stakeholder groups
Opportunities	Threats
Transition towards higher-value production and own-brand development	Increasing international competition
Digital Product Passport and traceability implementation	Rising compliance costs for SMEs
Circular economy and textile waste valorisation	Skills shortages related to digital and green transition
Stronger collaboration between production, design and research	Risk of remaining locked into low-value manufacturing
Cross-border innovation through FashionKIC	Rapid technological change requiring continuous investment

The ecosystem analysis confirms that Romania possesses a strong industrial base capable of supporting the transformation of the fashion and textile sector towards higher levels of sustainability, innovation and competitiveness. While manufacturing remains the ecosystem's principal comparative advantage, future growth will increasingly depend on strengthening collaboration, expanding innovation capacity and supporting companies in moving beyond production-focused business models.

The mapping indicates that the Romanian Regional Node can play a pivotal role in facilitating this transition by connecting manufacturers, designers, SMEs, universities, research organisations and circular economy actors through collaborative initiatives, practical innovation support and knowledge exchange. By leveraging its manufacturing excellence while strengthening ecosystem integration, Romania is well positioned to become a strategic contributor to the objectives of FashionKIC and to the development of a more resilient and innovation-driven European fashion ecosystem.

4.3.3 Collaboration and Strategic Positioning

The ecosystem mapping indicates that Romania already possesses a broad network of organisations capable of supporting the sustainable transformation of the fashion and textile sector. Universities, research institutes, textile clusters, manufacturers, circular economy organisations, innovation hubs and business support structures collectively provide a solid institutional foundation for ecosystem development. The principal challenge is therefore not the absence of stakeholders, but the need to strengthen coordination, improve knowledge exchange and establish more structured collaboration mechanisms capable of supporting long-term innovation.

Research and higher education institutions play a central role within the Romanian ecosystem. Organisations such as the **National Research and Development Institute for Textiles and Leather (INCDTP)**, the **Faculty of Industrial Design and Business Management at TUIASI**, the **Faculty of Visual Arts and Design at UNAGE Iași** and the

National University of Arts Bucharest provide specialised expertise in textile engineering, industrial design, sustainable materials and applied research. These institutions contribute not only to education and skills development but also to technology transfer and the integration of innovation into industrial practice. Their active involvement creates favourable conditions for strengthening collaboration between academia and industry within the FashionKIC framework.

The Romanian ecosystem is further reinforced by several regional clusters, business support organisations and circular economy initiatives that facilitate stakeholder engagement and collaborative innovation. Organisations such as **ASTRICO North-East, CANEPARO, Reginnova NE, Fashion Revolution Romania, ARETEX, Ateliere Fără Frontiere, Textile Hub Romania** and **Fab Lab Iași** contribute expertise in sustainable production, textile reuse, circular economy, community engagement and innovation support. Collectively, these organisations demonstrate that Romania already possesses many of the institutional components required for ecosystem development; however, stronger coordination between them remains essential to maximise their collective impact.

The mapping also highlights the importance of national and regional funding mechanisms supporting industrial modernisation, digitalisation and sustainable transition. Programmes financed through the **North-East Regional Programme, PCIDIF, Start-Up Nation, Femeia Antreprenor** and other national initiatives provide valuable opportunities for SMEs to invest in innovation, digital technologies, sustainability and workforce development. Nevertheless, many companies continue to require guidance in identifying appropriate funding opportunities and translating financial support into practical innovation projects. In this context, the Romanian Regional Node can play an important facilitative role by connecting companies with available support mechanisms and fostering collaboration around common development priorities.

The comparative analysis presented in Chapter 3 demonstrated that Romania occupies a distinctive position within the FashionKIC consortium. While Greece contributes creative entrepreneurship, Portugal offers advanced industrial innovation and Spain provides an integrated fashion ecosystem, Romania contributes extensive manufacturing expertise, practical production knowledge and a rapidly developing sustainability agenda. These complementary characteristics position the Romanian Regional Node as an important contributor to collaborative pilot projects, industrial innovation and the practical implementation of sustainable manufacturing solutions across the consortium.

Table 19: Strategic Positioning of the Romanian Regional Node within FashionKIC

Strategic Dimension	Contribution of the Romanian Regional Node
Manufacturing excellence	Strong production capacity and extensive experience within European value chains
Industrial innovation	Practical expertise in production processes, technical textiles and manufacturing transition

Strategic Dimension	Contribution of the Romanian Regional Node
Education and research	Universities and research institutes supporting applied research, skills development and technology transfer
Circular economy	Growing ecosystem of organisations promoting textile reuse, recycling and sustainable production
Stakeholder engagement	Active regional clusters, innovation organisations and business support structures
European cooperation	Strong potential for collaborative pilots, manufacturing innovation and knowledge exchange

The ecosystem mapping identifies four strategic priorities for the Romanian Regional Node within FashionKIC. First, the node should strengthen collaboration between manufacturers, designers, SMEs, universities and research organisations through structured networking activities and collaborative innovation projects. Second, it should support the transition from production-based business models towards higher-value activities by promoting design, branding, digitalisation and sustainable product development. Third, the node should facilitate the practical adoption of circular economy principles, Digital Product Passports and traceability systems through targeted training, advisory services and pilot actions. Finally, it should promote greater participation in European knowledge exchange activities, enabling Romanian stakeholders to access complementary expertise while sharing their manufacturing experience with the wider FashionKIC community.

Overall, the ecosystem mapping confirms that Romania possesses the industrial capacity, institutional diversity and emerging innovation potential required to become an active and valuable Regional Node within FashionKIC. By acting as a connector between manufacturing, research, education and circular economy actors, the Romanian Regional Node can accelerate ecosystem integration, strengthen regional competitiveness and contribute to the development of a more sustainable, resilient and innovation-driven European fashion and textile ecosystem.

4.4 Spain – Country Ecosystem Mapping Report

The Spanish Regional Node represents one of the largest and most diversified fashion and textile ecosystems within the FashionKIC consortium. Spain combines a globally competitive fashion industry, internationally recognised brands, specialised manufacturing clusters, advanced research and innovation infrastructures, and a strong network of design, education and business support organisations. These characteristics position Spain as a strategic contributor to the European fashion ecosystem and provide favourable conditions for accelerating the transition towards circularity, digitalisation and sustainable innovation.

The ecosystem mapping focuses on the broader Spanish Textile, Clothing, Leather and Footwear (TCLF) sector while placing particular emphasis on Catalonia, where the FashionKIC Regional Node is established. As one of Europe's leading textile regions, Catalonia concentrates a significant share of Spain's design schools, technology centres,

fashion companies and innovation organisations. The analysis therefore reflects both the national context and the specific strengths of the Catalan ecosystem, highlighting opportunities to strengthen collaboration, knowledge transfer and stakeholder engagement within the FashionKIC initiative.

4.4.1 Regional Ecosystem Profile

Spain hosts one of Europe's most established Textile, Clothing, Leather and Footwear (TCLF) ecosystems, combining manufacturing excellence, internationally recognised fashion brands and an extensive network of suppliers, technology centres and educational institutions. The fashion value chain contributes approximately **2.9% of national GDP** and **3.6% of total employment**, demonstrating its strategic importance as both an industrial and creative sector. In 2024, exports of textiles, apparel, leather and footwear exceeded **EUR 23 billion**, while imports reached approximately **EUR 30.4 billion**, reflecting the country's strong integration into global value chains.

The Spanish ecosystem is characterised by the coexistence of large multinational companies and an extensive network of SMEs. Internationally recognised brands such as **Inditex**, **Mango** and **Desigual** coexist with thousands of small and medium-sized enterprises, family-owned manufacturers, artisan workshops and independent designers. SMEs account for approximately **99.5% of all enterprises** operating within the sector, while women represent more than **70% of the workforce**, highlighting the sector's economic and social significance.

Catalonia represents one of the country's most important regional fashion ecosystems. The region hosts approximately **953 companies**, employs more than **73,000 people** and generates an annual turnover of approximately **EUR 17.6 billion**. Barcelona further strengthens this ecosystem through its concentration of design schools, technology centres, creative industries and innovation organisations, creating an environment where education, research and entrepreneurship closely interact with industrial production. Within this context, **ELISAVA School of Design and Engineering** serves as the coordinating institution for the Spanish FashionKIC Regional Node, facilitating collaboration between education, research, industry and public stakeholders.

The stakeholder mapping identifies a highly diversified ecosystem encompassing manufacturers, designers, SMEs, retailers, universities, technology centres, public authorities, business associations and circular economy organisations. Particularly significant actors include **MODACC**, **Eurecat Canet de Mar**, **LCI Barcelona**, **Texfor**, **Back to Eco**, **Sylvia Calvo BCN**, **Munich** and **Hilaturas Jesús Rubió**, each contributing complementary expertise in innovation, sustainable production, design, education and business development. Collectively, these organisations create a mature innovation ecosystem capable of supporting collaborative initiatives across the entire textile value chain.

Spain's policy environment further reinforces ecosystem development through strong alignment with European sustainability legislation. National initiatives supporting circular economy, textile waste management, ecodesign and digitalisation, together

with the implementation of **Law 7/2022 on Waste and Contaminated Soils**, provide a comprehensive regulatory framework encouraging companies to adopt more sustainable production models. These policy developments create favourable conditions for innovation while simultaneously increasing the demand for technical support, capacity building and cross-sector collaboration.

Table 20: Key Characteristics of the Spanish Regional Ecosystem

Dimension	Evidence from the Mapping
Economic profile	Fashion value chain contributes approximately 2.9% of GDP and 3.6% of national employment
Core industrial assets	International fashion brands, diversified manufacturing, strong SME ecosystem
Main stakeholder groups	Manufacturers, designers, SMEs, technology centres, universities, clusters and policy organisations
Innovation profile	Advanced research infrastructure supported by ELISAVA, Eurecat, MODACC and LCI Barcelona
Sustainability profile	Strong policy alignment with circular economy, ecodesign and digitalisation
Regional specialisation	Catalonia as one of Europe's leading fashion, design and textile innovation ecosystems

4.4.2 Ecosystem Analysis

The ecosystem mapping confirms that Spain possesses one of the most comprehensive and diversified fashion and textile ecosystems within the FashionKIC consortium. The combination of internationally competitive companies, specialised industrial clusters, advanced research institutions and a mature design ecosystem provides a strong foundation for sustainable innovation and industrial transformation. At the same time, the analysis identifies several structural challenges associated with ecosystem fragmentation, regulatory adaptation and the need to strengthen collaboration across the textile value chain. These findings position the Spanish Regional Node as a key contributor to the implementation of FashionKIC and to the broader transition of the European fashion ecosystem.

One of the principal strengths identified through the mapping is the high level of integration across the Spanish Textile, Clothing, Leather and Footwear (TCLF) sector. Spain combines internationally recognised fashion brands, advanced manufacturing capabilities, specialised suppliers, technology centres and business associations within a mature industrial ecosystem. The coexistence of global companies such as **Inditex**, **Mango** and **Desigual** alongside thousands of SMEs, family-owned manufacturers and independent designers creates a dynamic environment capable of supporting innovation throughout the entire value chain. This diversity enhances the ecosystem's resilience and facilitates collaboration between industrial production, design, retail and technology development.

A second major strength concerns the country's strong innovation and knowledge infrastructure. Catalonia, in particular, concentrates an extensive network of universities, design schools, technology centres and innovation organisations that actively support research, education and industrial development. Institutions such as **ELISAVA**, **Eurecat Canet de Mar** and **LCI Barcelona** contribute expertise in design, engineering, technology transfer and sustainability, while organisations such as **MODACC** and **Texfor** strengthen collaboration between industry, research and public authorities. This institutional density provides favourable conditions for accelerating knowledge exchange and supporting the adoption of innovative practices across the sector.

The mapping also highlights Spain's strong commitment to sustainability and circular economy principles. Numerous stakeholders have already incorporated sustainable design approaches, circular business models, recycled materials, repair services and digital solutions into their activities. Organisations such as **Back to Eco** and **Sylvia Calvo BCN** illustrate how circularity can be integrated into both product development and consumer engagement, while public initiatives promoting eco-design, waste reduction and digital innovation demonstrate increasing alignment with European sustainability objectives. These developments reinforce Spain's position as one of the leading ecosystems supporting the transition towards circular fashion.

Despite these considerable strengths, the ecosystem mapping identifies several important challenges. One of the principal bottlenecks concerns the limited coordination between education providers and industrial stakeholders. Although Spain benefits from an extensive educational infrastructure, collaboration between universities, design schools and companies remains uneven, limiting opportunities to align curricula with emerging industry needs and to facilitate knowledge transfer into practice. Strengthening cooperation between education, research and industry therefore represents a key priority for future ecosystem development.

Another challenge relates to the increasing complexity of the European regulatory framework governing sustainability, circularity and product traceability. The implementation of the Ecodesign for Sustainable Products Regulation (ESPR), Extended Producer Responsibility (EPR), Digital Product Passports (DPP) and national waste legislation requires companies to adopt new organisational processes, reporting mechanisms and production practices. While larger organisations generally possess sufficient resources to adapt, many SMEs continue to require technical guidance, specialised training and practical support to ensure effective compliance and maintain competitiveness.

The ecosystem analysis also identifies significant opportunities for future development. Spain's strong institutional capacity, industrial expertise and policy commitment create favourable conditions for advancing circular business models, sustainable materials, digital innovation and collaborative product development. Furthermore, the concentration of design schools, research centres and creative industries within Catalonia provides an excellent environment for experimentation, pilot projects and interdisciplinary collaboration. By strengthening cooperation between designers, manufacturers, technology centres and public organisations, the Spanish Regional Node

can further accelerate innovation while contributing to the implementation of European sustainability priorities.

Table 21: SWOT Summary of the Spanish Regional Ecosystem

Strengths	Weaknesses
Internationally recognised fashion industry and global brands	Fragmented collaboration between education and industry
Strong integration across the textile value chain	Limited coordination among ecosystem actors
Advanced research, design and technology infrastructure	SMEs require additional support for regulatory compliance
Mature ecosystem supporting sustainability and circular economy	Uneven adoption of digital and circular practices across the sector
Strong policy alignment with European sustainability objectives	Dependence on continuous investment in innovation and skills
Opportunities	Threats
Circular economy and sustainable product development	Increasing global competition
Eco-design, Digital Product Passports and traceability solutions	Rising compliance costs for SMEs
Strong collaboration between design, research and manufacturing	Rapid technological change
European innovation projects and cross-border cooperation	Changing consumer behaviour and market uncertainty
FashionKIC as a platform for knowledge exchange and ecosystem integration	Increasing regulatory complexity

The ecosystem analysis demonstrates that Spain combines industrial competitiveness, creative excellence and institutional capacity within one of Europe's most mature fashion and textile ecosystems. Its integrated value chain, internationally recognised brands and advanced research infrastructure provide a strong foundation for supporting innovation, sustainability and digital transformation.

Nevertheless, the mapping indicates that future ecosystem development will depend on stronger collaboration between education, research, industry and policy stakeholders, together with practical support for SMEs adapting to an increasingly demanding regulatory environment. By leveraging its industrial leadership while strengthening ecosystem coordination, the Spanish Regional Node is well positioned to support the objectives of FashionKIC and contribute to the development of a more circular, resilient and innovation-driven European fashion ecosystem.

4.4.3 Collaboration and Strategic Positioning

The ecosystem mapping demonstrates that Spain benefits from a highly developed network of organisations supporting research, education, industrial innovation, business development and sustainability within the Textile, Clothing, Leather and Footwear (TCLF) sector. Rather than lacking institutional capacity, the Spanish ecosystem is characterised by the presence of numerous specialised organisations operating across different stages of the value chain. Consequently, the principal role of the Spanish Regional Node is to strengthen coordination among these actors, facilitate interdisciplinary collaboration and promote the exchange of knowledge and innovation across the ecosystem.

Within this landscape, **ELISAVA School of Design and Engineering** occupies a central coordinating role. Through its multidisciplinary expertise in design, engineering, sustainability and innovation, ELISAVA is well positioned to connect higher education, research organisations, technology centres, creative industries and manufacturing companies. The ecosystem mapping identifies the institution as a strategic facilitator capable of translating emerging sustainability and digitalisation challenges into practical educational content, collaborative projects and innovation initiatives relevant to the wider textile value chain.

The collaborative ecosystem is further reinforced by specialised technology centres, business associations and innovation clusters. **Eurecat Canet de Mar** provides applied research, technology transfer and specialised support for textile innovation, while **MODACC** and **Texfor** strengthen collaboration between manufacturers, brands, suppliers and public institutions through networking activities, digitalisation initiatives and sustainability programmes. Together, these organisations contribute to a mature innovation ecosystem capable of supporting industrial competitiveness while facilitating the adoption of circular economy principles and advanced manufacturing practices.

Spain also benefits from a favourable institutional environment supporting sustainable transition. National initiatives led by the **Ministry for the Ecological Transition and the Demographic Challenge (MITECO)**, together with the implementation of **PERTE for the Circular Economy**, provide substantial financial support for innovation, eco-design, textile recycling, digitalisation and circular business models. Complementary initiatives coordinated by the **Textile and Fashion Observatory**, as well as organisations such as **Humana**, further strengthen stakeholder engagement by promoting responsible consumption, textile reuse, recycling and dialogue between industry and public authorities. These policy and funding mechanisms create favourable conditions for accelerating innovation while supporting companies in adapting to evolving European sustainability requirements.

The comparative analysis presented in Chapter 3 highlighted Spain's distinctive contribution to the FashionKIC consortium. While Greece contributes creative entrepreneurship, Portugal provides advanced manufacturing expertise and Romania strengthens industrial production capacity, Spain combines international market leadership, advanced design capabilities, research excellence and strong institutional

coordination. This balanced ecosystem enables the Spanish Regional Node to play an important role in promoting collaborative innovation, sustainability-oriented education and ecosystem governance across the wider FashionKIC network.

Table 22: Strategic Positioning of the Spanish Regional Node within FashionKIC

Strategic Dimension	Contribution of the Spanish Regional Node
International fashion leadership	Presence of globally recognised brands and highly competitive fashion companies
Design and innovation	ELISAVA, LCI Barcelona and creative industries supporting design-led innovation
Research and technology transfer	Eurecat and specialised research organisations promoting industrial innovation
Sustainability transition	Strong expertise in circular economy, eco-design and regulatory implementation
Stakeholder engagement	Active clusters, business associations and collaborative innovation networks
European cooperation	Extensive participation in international projects and policy initiatives supporting sustainable fashion

The ecosystem mapping identifies four strategic priorities for the Spanish Regional Node within FashionKIC. First, the node should reinforce collaboration between education, research, industry and public authorities by developing structured mechanisms for knowledge exchange and interdisciplinary cooperation. Second, it should support SMEs and creative businesses in responding to emerging sustainability and digitalisation requirements through targeted training, practical guidance and collaborative learning activities. Third, the node should capitalise on Spain's strong design culture, research infrastructure and industrial capacity to develop pilot actions demonstrating innovative approaches to circular fashion, eco-design and digital product development. Finally, the node should strengthen the dissemination of good practices and facilitate the transfer of knowledge across Regional Nodes, contributing to the wider objectives of FashionKIC as a European Knowledge and Innovation Community.

Overall, the ecosystem mapping confirms that Spain possesses the institutional maturity, innovation capacity and collaborative culture required to become one of the principal drivers of the FashionKIC initiative. By connecting education, research, industry and policy within an integrated innovation ecosystem, the Spanish Regional Node can significantly contribute to strengthening the resilience, sustainability and international competitiveness of the European fashion and textile sector.

5. Strategic Implications and Recommendations for FashionKIC

The Regional Ecosystem Mapping undertaken within FashionKIC provides a comprehensive evidence base for the implementation of the project and the long-term development of its Regional Nodes. The comparative analysis presented in Chapter 3 identified common strengths, structural challenges and opportunities across the participating ecosystems, while Chapter 4 examined the specific characteristics of each Regional Node. Together, these findings provide valuable insights that extend beyond ecosystem mapping and directly inform the strategic planning and implementation of the FashionKIC initiative.

Although the participating Regional Nodes differ in terms of industrial maturity, stakeholder composition and regional priorities, the mapping demonstrates that they share a common commitment to sustainability, innovation and collaboration. At the same time, recurring challenges—including ecosystem fragmentation, limited knowledge transfer, skills shortages, uneven digital readiness and the need for stronger stakeholder coordination—highlight the importance of coordinated interventions at European level.

The following strategic implications translate the findings of the ecosystem mapping into practical recommendations that can support the implementation of FashionKIC across its core activities. Rather than addressing individual Regional Nodes in isolation, this chapter identifies common priorities that can strengthen collaboration, improve stakeholder engagement and maximise the long-term impact of the project across the European fashion and textile ecosystem.

In line with the operational framework established in D2.1, these implementation priorities should be interpreted through the project's cross-cutting sustainability logic, taking into account relevant ESG dimensions, value-chain positioning and regionally material transition needs.

5.1 Platform and Regional Node Development

The ecosystem mapping demonstrates that one of the principal needs identified across all Regional Nodes is the establishment of stronger and more structured mechanisms for stakeholder collaboration. Although each participating region possesses a broad range of relevant actors, including manufacturers, designers, SMEs, universities, research organisations, public authorities and intermediary organisations—the interaction between these stakeholders often remains fragmented and project-based. Consequently, FashionKIC has the opportunity to strengthen ecosystem connectivity by providing common collaboration mechanisms that facilitate communication, knowledge exchange and long-term partnerships.

The findings further indicate that the FashionKIC platform should function as more than a digital repository of information. Instead, it should operate as an interactive ecosystem

management tool capable of supporting stakeholder networking, matchmaking, knowledge sharing and collaborative innovation. Functions such as stakeholder directories, partner search, thematic communities, funding opportunities, best practice repositories and collaborative workspaces would respond directly to the needs identified during the mapping process.

The Regional Nodes themselves should act as local ecosystem coordinators, facilitating stakeholder engagement while adapting project activities to regional priorities and capacities. Although each node operates within a different socioeconomic and industrial context, all share a common responsibility for strengthening regional collaboration, increasing stakeholder participation and creating sustainable governance mechanisms that remain active beyond the lifetime of the project.

Overall, the mapping confirms that the success of FashionKIC will depend not only on technological infrastructure but also on the capacity of the Regional Nodes to act as trusted intermediaries capable of connecting stakeholders, facilitating collaboration and promoting shared ownership of the emerging European Knowledge and Innovation Community.

5.2 Capacity Building and Innovation Support

A recurring finding across all Regional Nodes concerns the growing demand for practical knowledge and specialised skills supporting the green and digital transition of the fashion and textile sector. While awareness of sustainability and digitalisation is increasing, many organisations—particularly SMEs, designers and emerging enterprises—continue to require structured support to implement new business models, comply with evolving European legislation and adopt innovative technologies.

The ecosystem mapping identifies several thematic areas where coordinated capacity-building activities would generate significant added value. These include circular economy principles, sustainable product development, eco-design, Digital Product Passports, traceability systems, sustainable materials, digital manufacturing, innovation management and new business models. Rather than developing isolated training activities within each Regional Node, FashionKIC should promote shared educational resources, peer-learning initiatives and transnational training programmes that allow knowledge to circulate across the consortium.

Innovation support should similarly respond to the practical needs identified during the mapping process. SMEs and start-ups require access to mentoring, business development services, collaborative pilot projects and opportunities to test innovative solutions before market deployment. Complementary expertise identified across the four Regional Nodes creates favourable conditions for joint experimentation, cross-border innovation projects and collaborative acceleration activities capable of supporting sustainable entrepreneurship throughout the European fashion ecosystem.

By combining education, research, business support and industrial expertise, FashionKIC can contribute to developing a more skilled, innovative and resilient community capable of responding effectively to future technological, environmental and market challenges.

5.3 Sustainability, Policy and Communication

The ecosystem mapping demonstrates that sustainability has become a common strategic priority across all participating Regional Nodes. Although the level of implementation varies between countries, stakeholders consistently identified circular economy, resource efficiency, digital traceability and responsible production as central drivers of future competitiveness. At the same time, the introduction of European initiatives such as the Ecodesign for Sustainable Products Regulation, Digital Product Passports and Extended Producer Responsibility creates increasing demand for practical guidance, policy interpretation and collaborative learning.

FashionKIC therefore has an important role in supporting stakeholders throughout this transition. Beyond providing technical knowledge, the project should facilitate dialogue between industry, academia, policymakers and civil society, enabling Regional Nodes to exchange experiences, disseminate good practices and jointly address emerging regulatory challenges. This collaborative approach will strengthen policy uptake while supporting more coherent implementation across different regional contexts.

Communication activities should reinforce these objectives by promoting FashionKIC as a collaborative European ecosystem rather than a collection of independent regional initiatives. Dissemination strategies should highlight successful pilot actions, stakeholder collaborations and innovation stories emerging from the Regional Nodes while encouraging broader participation from SMEs, designers, educational institutions and public organisations. By communicating practical examples of sustainable innovation and ecosystem collaboration, FashionKIC can strengthen stakeholder engagement, increase project visibility and contribute to the wider transformation of the European fashion and textile sector.

5.4 Strategic Recommendations

Based on the comparative ecosystem mapping and country-level analyses, the following strategic recommendations translate the identified ecosystem gaps into implementation priorities. Table 23 links each recommendation to the relevant FashionKIC Work Package(s), an indicative implementation timeframe and the specific gaps identified in Table 8 that it is intended to address.

Table 23: Implementation Framework for the Strategic Recommendations

Strategic Recommendation	Relevant WP(s)	Indicative Timeframe	Gap(s) addressed from Table 8
1. Strengthen stakeholder connectivity through structured collaboration	WP2 – FashionKIC	Short-term and ongoing	Ecosystem fragmentation; Limited knowledge transfer

Strategic Recommendation	Relevant WP(s)	Indicative Timeframe	Gap(s) addressed from Table 8
mechanisms that facilitate long-term cooperation between industry, academia, research organisations and public authorities.	Innovation Nodes Network		between academia and industry; Limited cross-sector collaboration
2. Develop a collaborative digital platform that supports networking, knowledge exchange, partner discovery and access to innovation resources across all Regional Nodes.	WP1 – AI-Powered Platform and Data Intelligence , with input from WP2	Short- to medium-term	Ecosystem fragmentation; Limited knowledge transfer between academia and industry; Limited SME access to innovation support
3. Prioritise practical capacity-building activities focusing on sustainability, digitalisation, circular economy, eco-design and emerging European regulatory requirements.	WP3 – Next-Generation Knowledge and Capacity Building , with input from WP2	Short- to medium-term and ongoing	Skills gaps related to sustainability and digitalisation; Uneven innovation ecosystem maturity
4. Support SMEs and entrepreneurs through mentoring, innovation services, pilot actions and collaborative acceleration initiatives that facilitate business growth and sustainable transformation.	WP4 – FashionKIC Acceleration Programme , supported by relevant Regional Nodes	Medium-term	Limited SME access to innovation support; Access to finance and acceleration services; Internationalisation challenges for SMEs
5. Promote cross-node collaboration by leveraging expertise across the participating Regional Nodes and encouraging joint innovation projects, peer learning and knowledge transfer.	WP2 – FashionKIC Innovation Nodes Network , with cross-WP participation	Short-term and ongoing	Uneven innovation ecosystem maturity; Limited knowledge transfer between academia and industry; Limited cross-sector collaboration
6. Strengthen ecosystem governance and long-term sustainability by establishing durable stakeholder networks, improving Regional Node	WP2 – FashionKIC Innovation Nodes Network and WP5 – European	Medium- to long-term	Ecosystem fragmentation; Limited cross-sector collaboration; Uneven innovation ecosystem maturity

Strategic Recommendation	Relevant WP(s)	Indicative Timeframe	Gap(s) addressed from Table 8
coordination and fostering continued collaboration beyond the duration of the project.	Expansion and Policy Integration		

The implementation logic presented above is aligned with the existing FashionKIC work plan rather than introducing parallel structures or new contractual responsibilities. WP2 provides the principal framework for Regional Node coordination and cross-node knowledge exchange; WP1 supports the digital platform dimension; WP3 addresses capacity building; WP4 provides the acceleration pathway for SMEs and entrepreneurs; and WP5 supports longer-term expansion, governance and sustainability. The recommendations should therefore be implemented through the relevant Work Package activities and refined as the project progresses.

6. Conclusion

The Regional Ecosystem Mapping conducted within the framework of the FashionKIC project has provided a comprehensive understanding of the characteristics, capacities and development needs of the four participating Regional Nodes. Through a common methodological framework, the mapping combined quantitative evidence, desk research, stakeholder mapping and ecosystem analysis to identify the main strengths, structural challenges and opportunities shaping the fashion and textile ecosystems of Greece, Portugal, Romania and Spain.

The comparative analysis identified a set of recurring challenges across the four Regional Nodes, including ecosystem fragmentation, limited cross-sector knowledge exchange, skills gaps, uneven innovation capacity and the need to accelerate the digital and sustainable transition. These findings indicate that stronger coordination, targeted capacity building and structured cross-node cooperation are required to address common ecosystem needs while responding to regional specificities.

The principal value of D2.2 lies in translating this evidence into implementation priorities for FashionKIC. The identified gaps and opportunities should inform Regional Node coordination, platform development, capacity-building activities, SME and innovation support, and longer-term ecosystem governance through the relevant project Work Packages. The implementation framework presented in Chapter 5 provides the operational link between the mapping findings, the identified ecosystem gaps and the next stages of project delivery.

Within WP2, the findings of D2.2 provide a direct input to the next stages of Regional Node development, particularly cross-node knowledge exchange and the preparation of longer-term Node development and sustainability approaches. The immediate next step is therefore to move from ecosystem diagnosis to structured activation: strengthening stakeholder connections within the Nodes, facilitating exchange of practices and expertise across countries, and using the evidence generated through the mapping to refine subsequent WP2 activities in coordination with the wider FashionKIC work plan.

In this way, the ecosystem mapping marks the transition from analysis to implementation. Its findings establish a common evidence base for coordinated action across the Regional Nodes and provide practical direction for the next phases of FashionKIC. Continued use and refinement of this evidence through stakeholder engagement, cross-node exchange and project implementation will be essential to ensuring that the Regional Nodes develop as connected, responsive and sustainable components of the wider FashionKIC ecosystem.

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Annexes A- Regional Ecosystem Mapping Canvas

The following annexes provide the complete Regional Ecosystem Mapping Canvases developed for each participating FashionKIC Regional Node. Prepared using the common ecosystem mapping methodology described in Chapter 2, the canvases summarise the key findings of the regional analyses, including the regional context, stakeholder landscape, key actors, collaboration mechanisms, ecosystem strengths and weaknesses, identified gaps, opportunities and strategic priorities. The canvases constitute the primary analytical outputs of the ecosystem mapping process and complement the analyses presented throughout this deliverable.

Annex A.1 Greece

This annex presents the Regional Ecosystem Mapping Canvas developed for the Greek FashionKIC Regional Node. The canvas provides a comprehensive visual synthesis of the Greek fashion and textile ecosystem, bringing together the key findings of the regional mapping exercise, including the regional context, stakeholder landscape, key actors, collaboration mechanisms, ecosystem strengths and weaknesses, identified gaps, opportunities and strategic implications for action. It complements the **Greece Country Ecosystem Mapping Report** presented in Chapter 4 by illustrating the analytical framework and principal outcomes of the ecosystem mapping process.

ECOSYSTEM MAPPING CANVAS - GREECE

Partner: Envolv Entrepreneurship


Co-funded by
the European Union

1 REGIONAL CONTEXT (MACRO)

Greece presents a relevant context for a FashionKIC node, combining a textile and clothing sector of ~4,921 firms and 23,374 employees with EUR 1.7 billion in exports, with Germany, Cyprus, Italy and Spain as the main destination markets. The ecosystem benefits from unique raw material assets, including the only active silk production site in Europe (Soufli, Thrace — Art of the Silk Museum / Soufli Silk Association) and one of the EU's largest cotton-producing regions (Thrakia Ekkokkistiria S.A. and associated producers). The policy environment is shaped by the National Circular Economy Action Plan 2021–2025, the ESPA 2021–2027 Competitiveness Programme and the RIS3 strategy, which identifies creative industries as a priority. Education now includes a public HEI option through the International Hellenic University (Department of Creative Design and Clothing, Serres), alongside approximately 15 private institutions and IEK-level providers.

2 STAKEHOLDER LANDSCAPE

The Greece node maps 33 stakeholders across all five required categories: Designers / Creators (8, 24%), SMEs / Brands / Startups (5, 15%), Industry / Manufacturing / Suppliers (2, 6%), Education / Research (7, 21%) and Policy / Associations / Support (11, 33%). All categories exceed the 10% minimum threshold with the exception of Industry / Manufacturing, which reflects the current structure of the mapped ecosystem and will be reviewed during node operationalisation. The distribution reflects a strong policy and association layer, a growing and internationally visible designer and SME segment and a reinforced education category including the International Hellenic University, the only public HEI with a dedicated fashion programme. The full stakeholder list is available in the Layer 2 supporting evidence.

3 KEY ACTORS

SEPEE (Hellenic Fashion Industry Association) is the main industry voice, connecting Greek manufacturers to Euratex and the IAF, and is a critical gateway for policy dialogue and node anchoring. HFDA (Hellenic Fashion Designers Association) represents the creative sector and promotes Greek fashion internationally. Fashion Revolution Greece is the most active sustainability-focused organisation, operating the Athens Fashion Hackathon and the FABRIX circular manufacturing platform with AUEB and NTUA. AXDW (Athens Xclusive Designers Week) is the key biannual visibility platform for established and emerging designers. ZEUS+DIONE, Ioanna Kourbela and Parthenis are anchor sustainable brands combining heritage materials with local production and international market credibility. The International Hellenic University (IHU — Dept. of Creative Design and Clothing) is the only public HEI with a dedicated fashion programme, based in Central Macedonia.

4 PRIORITY TARGET GROUPS

Emerging designers and creative entrepreneurs seeking sustainability tools, business support and EU market access. Fashion SMEs needing practical compliance guidance, digitalisation support and circularity tools. Education and training institutions — including IHU (Serres), private colleges and IEK providers — for sustainability curriculum alignment. Industry and manufacturing actors in Central Macedonia and Thessaly for circular production and traceability. Policy, chamber and support organisations (TCCI-EBETH, Technical Chamber, SEPEE, GSRI) for institutional anchoring and ecosystem coordination.

7 OPPORTUNITIES

The Greece node can create new value by acting as the first practical gateway connecting Greek SMEs and designers to EU sustainability compliance support (ESPR, EPR, DPP), turning a regulatory burden into a guided transition pathway. By anchoring activities in both Athens and Thessaloniki, the node can launch joint programmes with IHU, AAS College and Mediterranean College to build a sustainability-skills pipeline feeding directly into the ecosystem. It can mobilise ESPA 2021–2027 and Greece 2.0 funding on behalf of SMEs that currently lack the capacity to access these instruments alone. Through TCCI-EBETH and the Technical Chamber of Greece, the node can open new engagement channels with manufacturing and engineering actors in Central Macedonia who are not currently part of the fashion ecosystem conversation. Finally, the node can position Greek heritage materials — Soufli silk and Greek cotton — as a shared sourcing and storytelling asset for designers and brands across the FashionKIC network, and use the tourism-fashion crossover to pilot new retail and experiential formats with brands such as ZEUS+DIONE, Ioanna Kourbela and ACCESS Fashion.

5 EXISTING COLLABORATION MECHANISMS

Greece already has relevant collaboration assets in place, including AXDW as a biannual designer showcase, the Athens Fashion Trade Show as a B2B commercial exchange, and SEPEE, HCIA and TCCI-EBETH (Thessaloniki Chamber of Commerce & Industry) as established business and industry networks. Fashion Revolution Greece runs the Athens Fashion Hackathon and the FABRIX platform, providing an active model for sustainability-focused collaboration involving academia, industry and international partners. The Technical Chamber of Greece connects engineering professionals to technical standards and compliance. Enterprise Greece and the EEN facilitate internationalisation and cross-border partnerships for SMEs. ESPA 2021–2027 and LIFE-IP CEI-Greece instruments support green and digital transition across the sector. The node should build on these existing assets rather than replicate them.

6 ECOSYSTEM SWOT

Strengths

Greece has internationally recognised sustainable fashion brands combining cultural heritage with local production and natural materials, including Soufli silk (Art of the Silk Museum / Soufli Silk Association) and Greek organic cotton (Thrakia Ekkokkistiria S.A.), providing strong ecosystem credibility and export reach. The education landscape has been strengthened by the International Hellenic University's Department of Creative Design and Clothing — the only public HEI fashion programme in Greece — alongside a dense network of private colleges and IEK providers. The country benefits from an active fashion event infrastructure, a growing startup ecosystem and unique raw material assets that are rare in the European context.

Opportunities

EU sustainability regulations — ESPR, EPR for textiles and the Digital Product Passport — create direct demand for support services that the node can provide. ESPA 2021–2027 and Greece 2.0 offer accessible funding for green and digital transition. The reinforced education base (IHU, NTUA, AUEB, private colleges) creates conditions for curriculum co-development and student pipeline programmes. The TCCI-EBETH and Technical Chamber of Greece open new channels to reach manufacturing and engineering actors, particularly in Central Macedonia / Thessaloniki.

Weaknesses

The ecosystem remains structurally fragmented, with no single mechanism connecting designers, manufacturers, education and policy actors. The Industry / Manufacturing / Suppliers category is underrepresented in the current mapping (2 actors, 6%), reflecting a structural gap in the ecosystem's industrial anchoring. While the IHU programme addresses the public HEI gap, no dedicated national textile R&D centre exists comparable to Portugal's CITEVE or Romania's INCOTEP. SME awareness of EU sustainability compliance requirements remains low, and circular economy infrastructure for textiles is underdeveloped.

Threats

Continued ecosystem fragmentation and the risk of creative talent emigrating abroad remain structural challenges. The fast-changing EU regulatory environment may outpace SME capacity to adapt. The underrepresentation of manufacturing actors in the mapped ecosystem risks limiting the node's industrial anchoring. High energy costs and competition from lower-cost neighbouring production continue to pressure the Greek manufacturing base.

9 IMPLICATIONS FOR ACTION

The first priority for the Greece node should be to position itself as the first structured connector between designers, manufacturers, education and policy actors, addressing the ecosystem's defining fragmentation gap — including the geographic divide between Athens and Central Macedonia. The second should be to translate EU sustainability compliance requirements into practical support tools and training formats for Greek SMEs and designers, leveraging the TCCI-EBETH and Technical Chamber as channels into the Thessaloniki business community. The third should be to build visibility around Greece's unique assets — Soufli silk, Greek cotton, heritage brands and the IHU design programme in Central Macedonia — to establish the node as a credible European reference for sustainable fashion. For WP1: user profiles = emerging designers, fashion SMEs, IHU/AAS/Mediterranean College students. For WP2: priority engagement = SEPEE, HFDA, Fashion Revolution Greece, AXDW, IHU, TCCI-EBETH, Technical Chamber. For WP5: policy anchoring via ESPA 2021–2027, National CE Action Plan, and long-term advocacy for a national textile R&D centre.

8 GAPS

Greece lacks a dedicated national textile technology or R&D centre — the most critical structural gap compared to other node countries. While the International Hellenic University (IHU, Serres) partially addresses the public HEI gap, the ecosystem still lacks a technical innovation and testing infrastructure. The Industry / Manufacturing category is underrepresented in the mapping (2 actors), pointing to a need for deeper engagement with the manufacturing base, particularly in Central Macedonia. Circular economy infrastructure for textiles remains underdeveloped, and SME awareness of EU sustainability compliance requirements — ESPR, EPR for textiles, Digital Product Passport — is low. The absence of structured links between the Thessaloniki-based institutions (TCCI-EBETH, Technical Chamber, IHU) and the Athens-based creative and policy ecosystem reflects a broader geographic fragmentation challenge.

Figure 2: Greece Regional Ecosystem Mapping Canvas

Annex A.2 Portugal

This annex presents the Regional Ecosystem Mapping Canvas developed for the **Portuguese FashionKIC Regional Node**. The canvas provides a structured overview of the Portuguese fashion and textile ecosystem, highlighting its regional context, stakeholder landscape, key actors, collaboration mechanisms, ecosystem strengths and development opportunities identified through the ecosystem mapping process. It complements the Portugal Country Ecosystem Mapping Report presented in Chapter 4 by illustrating the analytical framework and key findings that underpin the assessment of the regional ecosystem.

ECOSYSTEM MAPPING CANVAS - PORTUGAL

Partner: Associação ModaLisboa

1 REGIONAL CONTEXT (MACRO)

Portugal presents a relevant and strategically promising context for the development of a FashionKIC node. The national ecosystem combines a strong textile and clothing manufacturing base, recognised technical and innovation capacities, established vocational and higher education infrastructures, and a visible fashion and design culture. The Portuguese context is increasingly shaped by sustainability, circularity, digitalisation, traceability and skills-transition pressures, which create favourable conditions for a node model focused on coordination, capability-building and ecosystem activation. While the ecosystem does not depend primarily on large fashion brands, it benefits from a combination of industrial depth, export orientation, technical knowledge and cultural visibility that can support both local engagement and European-level contribution.

2 STAKEHOLDER LANDSCAPE

The Portuguese node should prioritise coordination, articulation and activation across existing ecosystem assets. Its primary added value lies in strengthening the interfaces between design, industry, education, research and support actors, and in translating emerging sustainability and transition pressures into practical, collaborative and locally relevant formats. In operational terms, this implies focusing on stakeholder connection, use-case identification, skills and capacity-building opportunities, and the creation of visible pathways between Portuguese ecosystem strengths and the broader European FashionKIC framework. The node should therefore be positioned not as a new isolated structure, but as a strategic coordination mechanism capable of unlocking stronger collaboration across an already capable but insufficiently connected ecosystem.

3 KEY ACTORS

ModaLisboa is a key ecosystem connector, particularly for visibility, creative sector engagement, and stakeholder mobilisation in the Portuguese node. CITEVE is a strategic actor for technology, R&D, testing, sustainability transition, and industrial innovation. MODATEX plays a central role in sector-specific vocational education and workforce development. Relevant higher education institutions include Faculdade de Arquitetura da Universidade de Lisboa, IADE, Universidade Lusófona, UBI, Universidade do Minho, ESAD Matosinhos and specialised fashion and skills-based institutions such as MODATEX Lisboa and Porto, Escola de Moda de Lisboa and Escola de Moda do Porto. Sector representation and policy interface actors such as ModaPortugal / ANIVET, ATP and relevant regional development and support bodies are also influential because they connect firms, industrial strategy, regional policy, and internationalisation.

4 PRIORITY TARGET GROUPS

- _ fashion SMEs and small brands needing support on sustainability, compliance, digitalisation, and market readiness
- _ manufacturers and suppliers able to contribute use cases, technical knowledge, and innovation partnerships
- _ designers and creative professionals interested in sustainable design, new materials, and cross-sector collaboration
- _ education and training institutions that can support skills development, testing, and dissemination
- _ policy and support actors that can help anchor the node institutionally and align it with regional and national transition priorities

7 OPPORTUNITIES

The Portugal node can add most value as a connector, knowledge hub, and translation layer between different parts of the ecosystem. It can create structured links between designers and industry, bring education and training actors closer to implementation needs, and provide a practical entry point into sustainability, digitalisation, traceability, and circularity topics. It can also use local events, targeted community-building formats, and platform-related testing or needs collection to strengthen ecosystem activation and European integration. This is aligned with WP2's role in connecting regional ecosystems, supporting innovation and collaboration, enabling cross-node exchange, and activating ecosystems through events and initiatives.

5 EXISTING COLLABORATION MECHANISMS

Portugal already has relevant collaboration assets in place. These include sectoral representation structures, export and cluster support mechanisms, technical and innovation infrastructures, and education and training actors distributed across the textile and clothing industry. Collaboration is particularly well established in industrial support, training, and export positioning, but less consolidated as a shared innovation ecosystem connecting design, manufacturing, education, sustainability transition, and policy dialogue under one node logic. This means the Portuguese node should build on existing strengths rather than duplicate them.

6 ECOSYSTEM SWOT

Strengths

Portugal has a recognised textile and clothing sector with strong manufacturing capabilities, international orientation, and growing positioning in quality, technical textiles, and sustainable practices. It also benefits from a relevant skills base, vocational training infrastructure, and recognised innovation support capacity. The country combines industrial depth with a visible design and fashion culture, which gives the node strong potential to bridge creativity and production.

Opportunities

The Portuguese node can leverage strong sector transition pressure linked to EU sustainability, traceability, and product requirements. It can also build on Portugal's industrial credibility, export reach, and growing reputation in sustainable and technical materials. There is a clear opportunity to position the node as a connector between design, manufacturing, training, and innovation, while also feeding practical needs and use cases into WP2, WP3 and strategic insights into WP5.

Weaknesses

The ecosystem is not yet fully integrated across the value chain and remains partially fragmented between industrial, education, creative, and policy spheres. Smaller actors may have limited access to technical support, sustainability expertise, and structured collaboration formats. The visibility of some technical and training capacities is also uneven outside the core industrial territories.

Threats

The main threats are continued fragmentation, low coordination between actors, unequal institutional capacity across stakeholder groups, and the risk that sustainability and compliance requirements increase faster than the ecosystem's ability to support smaller businesses and creative actors. There is also a risk that existing capabilities remain disconnected from European collaboration and from newer digital and circular business model opportunities.

9 IMPLICATIONS FOR ACTION

The first priority for the Portugal node should be to strengthen structured collaboration between design, manufacturing, education, and support actors. The second should be to translate sustainability and digital transition needs into practical use cases, training needs, and node activities. The third should be to build a visible and credible local ecosystem platform that can connect Portuguese actors to the wider European FashionKIC network. For WP1, the main inputs are user profiles, concrete node use cases, and priority sustainability/digital needs. For WP2, the main inputs are stakeholder engagement priorities and activity formats. For WP5, the main inputs are policy-relevant bottlenecks, regional anchoring opportunities, and long-term ecosystem development needs.

8 GAPS

The ecosystem still shows important coordination gaps between creative actors and manufacturing actors, especially in structured collaboration, innovation brokerage, and shared experimentation spaces. There is also a gap between strong technical capacity and its visibility to smaller brands, designers, and emerging businesses. Skills infrastructures exist, but stronger articulation is needed between vocational training, higher education, digitalisation, sustainability requirements, and real business needs. Finally, the ecosystem lacks a sufficiently visible node-like structure able to connect local actors with European collaboration, policy developments, and shared use cases for platform and programme development.

Figure 3: Portugal Regional Ecosystem Mapping Canvas

Annex A.3- Romania

This annex presents the Regional Ecosystem Mapping Canvas developed for the **Romanian FashionKIC Regional Node**. The canvas provides an integrated overview of the Romanian fashion and textile ecosystem, bringing together the key findings of the ecosystem mapping exercise, including the regional context, stakeholder landscape, key actors, collaboration mechanisms, ecosystem strengths and weaknesses, identified gaps, opportunities and strategic priorities. It complements the Romania Country Ecosystem Mapping Report presented in Chapter 4 by illustrating the analytical framework and evidence that underpin the assessment of the regional ecosystem.

ECOSYSTEM MAPPING CANVAS - ROMANIA

Partner: Asociatia Reginnova NE

1 REGIONAL CONTEXT (MACRO)

Romania offers a strong foundation for a FashionKIC node, with a long textile and fashion tradition, a solid manufacturing base and a highly export-oriented sector. The ecosystem is mainly composed of micro-enterprises and SMEs, supported by specialised vocational and higher education institutions, research actors and business support organisations. However, the sector remains largely focused on manufacturing and lohn/CMT production, with more limited value capture in design ownership, own-brand development, advanced services and market positioning. Recent strategies and EU policies such as ESPR, EPR for textiles and traceability requirements are pushing circularity and digitalisation higher on the competitiveness agenda. The ecosystem is already showing progress through digital tools, deadstock use, repair, recycling, upcycling and low-volume production. Still, Romania has not reached full circular or digital maturity. Key gaps remain in collaboration, shared infrastructure, practical support and centralised networks. This creates a strong case for a FashionKIC node that helps companies connect, collaborate and move toward higher-value activities.

2 STAKEHOLDER LANDSCAPE

The core Romanian mapping covered 37 stakeholders across all 5 categories: Designers / Creators (6 companies), SMEs / Brands / Startups (8 companies), Industry / Manufacturing / Suppliers (6 companies), Education / Research (6 organizations), Policy / Associations / Support (11 organizations). The full list is available in the layer 2 supporting evidence. The key insight is that Romania does not lack actors. It lacks stronger bridges between them. Stakeholders often work in parallel rather than through structured collaboration, which is where the Romanian node can add the most value.

3 KEY ACTORS

Key strategic actors include a focused mix of manufacturers, circular economy organisations, education actors and ecosystem connectors. Reginnova NE is positioned as a key regional connector in NE Romania, able to bring together a wide range of stakeholders. Katty Fashion and DATSA Textil are relevant manufacturing anchors, with practical experience in sustainable production, digitalisation and innovation pilots. DIMA and other educational institutions bring technical and academic expertise, especially for skills development, R&D and knowledge transfer. On the circularity and sustainability side, ARETEX, REDU, IRCEM and Fashion Revolution Romania are important partners. ARETEX is a relevant actor for textile reuse and recycling, REDU brings practical upcycling and textile waste experience, IRCEM contributes circular economy knowledge and capacity-building, while Fashion Revolution Romania strengthens transparency, ethics and awareness. Designers like SABINNE on the other hand provide key insights on market realities from both industry and end consumer perspectives. Together, these actors give the Romanian node a clear role as a connector between production, circularity, research, skills and industry transformation.

4 PRIORITY TARGET GROUPS

The Romanian FashionKIC node should prioritise fashion SMEs, small brands and designers that need support on sustainability, compliance, digitalisation, product development and market readiness as they benefit from better access to circular economy partners, knowledge resources and testing opportunities for new products, materials or business models. A second key target group is manufacturing SMEs and suppliers able to contribute technical knowledge, production capacity and real industry use cases. These actors are essential for piloting higher-value services and circular production models. Education and research actors should support applied experimentation and skills development, while circular economy organisations can contribute practical solutions for reuse, recycling and material valorisation as well as key specialised knowledge on practical applications. Policy, association and support organisations should also be involved to connect company needs with funding, regulation and long-term ecosystem development.

7 OPPORTUNITIES

The Romanian node can add most value as a connector, knowledge hub and testing environment for a manufacturing-strong ecosystem that is ready to move toward higher-value, more innovative and more sustainable activities. It can connect manufacturers, designers, circular economy actors, researchers and support organisations around concrete collaboration opportunities. As a knowledge hub, the node can translate sustainability, traceability and digitalisation topics into practical guidance and training for companies. As a testing environment, it can support small-scale pilots in digital sampling, textile waste valorisation, repair, upcycling, sustainable materials and new circular business models. This positions the Romanian node as a practical platform for competitiveness, innovation and collaboration.

5 EXISTING COLLABORATION MECHANISMS

Romania already has useful structures: textile clusters, universities, research institutes, innovation hubs, circular economy NGOs, business support organisations and EU-funded projects. Examples include INCDTP, TUIASI, ASTRICO North-East, Romanian Textile Concept Cluster, Fab Lab Iasi, ARETEX, Textile Hub Romania, REDU and Fashion Revolution Romania. However, these mechanisms are not fully connected into one strong national innovation pathway for fashion and textiles, and collaboration often forms informally, where companies can miss out on available opportunities or collaborations from lacking visibility or information fragmentation. The FashionKIC node should therefore avoid duplicate existing initiatives and focus more on coordinated efforts, connection and activation around concrete company needs.

6 ECOSYSTEM SWOT

Strengths

Romania has a strong textile and fashion manufacturing base, long production tradition, export experience and skilled technical workforce. The ecosystem includes relevant fashion SMEs, manufacturers, designers, universities, research actors and circular economy organisations. There is also growing awareness of sustainability, digital tools and circular practices, creating a good foundation for innovation and collaboration.

Opportunities

The Romanian node can connect existing capabilities and support companies in moving toward higher-value activities such as product development, digital sampling, sustainable manufacturing, traceability, repair, reuse, upcycling and material innovation. It can also support joint pilots and testing activities that reduce the individual investment burden for SMEs.

Weaknesses

The sector remains strongly concentrated in lohn/CMT and production-based activities, with limited value capture in design ownership, own-brand development, advanced services and market positioning. Collaboration between manufacturers, designers, research actors and circular organisations is still fragmented, and many SMEs have limited resources to invest in new technologies, digitalisation, circular infrastructure or internal innovation capacity. Digital and sustainability readiness is uneven across SMEs.

Threats

Rising compliance requirements, labour shortages, high production and energy costs, import competition and limited access to finance may increase pressure on SMEs. Without support, the gap between more advanced firms and traditional manufacturers may grow, while continued fragmentation could limit the ecosystem's ability to scale innovation.

9 IMPLICATIONS FOR ACTION

Priority actions should focus on creating stronger links between manufacturers, fashion SMEs, designers, research actors, circular organisations and support institutions. A second priority is to provide practical knowledge, training and upskilling on key topics, which should be translated into accessible formats for SMEs, with a clear focus on competitiveness and implementation. A third priority is to support pilots and testbed activities both within the node as well as across nodes. For **WP1**, this can inform user needs and platform use cases. For **WP2**, it supports ecosystem activation and indicates activities and engagement needs. For **WP5**, it provides insights on bottlenecks, long-term ecosystem development needs and regional anchoring opportunities.

8 GAPS

The Romanian ecosystem has strong production capacity, but remains fragmented across manufacturing, design, research, circular economy and support actors. Many companies still rely on lohn/CMT models, with limited value capture through own products, branding, advanced services or market positioning. Digital and circular practices are emerging, but not yet widely scaled. SMEs also have limited resources to invest individually in new technologies, testing, circular solutions or internal innovation. The main bottlenecks are therefore linked to weak collaboration, limited access to practical knowledge, skills gaps and few shared spaces for experimentation.

Figure 4: Romania Regional Ecosystem Mapping Canvas

Annex A.4- Spain

This annex presents the Regional Ecosystem Mapping Canvas template used for the **Spanish FashionKIC Regional Node**. The canvas outlines the analytical categories applied during the ecosystem mapping process, including regional context, stakeholder landscape, key actors, priority target groups, collaboration mechanisms, SWOT analysis, gaps, opportunities and implications for action. It complements the Spain Country Ecosystem Mapping Report presented in Chapter 4 by documenting the visual framework used to structure the regional ecosystem analysis.

ECOSYSTEM MAPPING CANVAS - SPAIN

1 REGIONAL CONTEXT (MACRO)

- Strong TCLF ecosystem (2.9% GDP, 3.6% employment)
- Major regions: Catalonia, Valencia, Galicia, Madrid
- 99.5% SMEs + strong creative sector
- Transition driven by circularity & digitalisation
- New EU regulations (Ecodesign, EPR, DPP, Waste Law)

9 IMPLICATIONS FOR ACTION

- _ Top 3 priorities for the Node
- _ Top 3 inputs for WP1, WP2 & WP5

2 STAKEHOLDER LANDSCAPE

Designers / Creators

- Independent designers
- Artisan workshops

SMEs / Brands / Startups

- Fashion SMEs
- Brands
- Circular start-ups

Industry / Manufacturing / Suppliers

- Textile manufacturers
- Yarn producers
- Footwear & leather
- Recyclers

Education / Research

- Universities
- Design schools
- Technology centres

Policy / Associations / Support

- MODACC
- Texfor
- Public administrations
- Certification bodies

3 KEY ACTORS

MODACC – textile cluster & ecosystem connector

Eurecat Canet – textile R&D & technology transfer

LCI Barcelona – fashion education

Sylvia Calvo BCN – circular fashion leadership

Back to Eco – repair & circular education

5 ECOSYSTEM SWOT

Strengths

- Strong industrial base
- Active innovation ecosystem
- Circular & digital initiatives
- International fashion brands

Opportunities

- EU Green Deal regulations
- Skills development
- Digitalisation
- Cross-sector collaboration

Weaknesses

- Fragmented ecosystem
- Limited industry–education links
- Low SME training capacity

Threats

- Global competition
- Rising production costs
- Regulatory complexity
- Dependence on imports

4 EXISTING COLLABORATION MECHANISMS

- MODACC cluster
- Texfor association
- MITECO Circular Economy funding
- PERTE Circular Economy projects
- Textile & Fashion Observatory
- EU research projects
- Humana reuse network

8 PRIORITY TARGET GROUPS

- Designers & creative professionals
- Fashion SMEs & brands
- Manufacturers & suppliers
- Education & training providers
- Policy makers & support organisations

Activities:

- Capacity building
- Pilot programmes
- Community events
- Platform collaboration

7 OPPORTUNITIES

- Ecosystem connector
- Skills & training hub
- Innovation testbed
- Knowledge transfer platform
- Circular transition accelerator

6 GAPS

- Weak education–industry alignment
- Limited collaboration between actors
- SME support for regulation
- Skills gaps in sustainability & digitalisation

Partner: ELISAVA

Figure 5: Spain Regional Ecosystem Mapping Canvas

Annexes B

This Annex presents the stakeholders identified through the ecosystem mapping process for each of the four FashionKIC Regional Nodes. The lists provide the supporting evidence for the stakeholder identification KPI established for the regional mapping exercise and complement the stakeholder analysis presented in the main body of Deliverable D2.2.

Annex B.1 - Greece

Table 24: Stakeholders Identified in the Greek Regional Ecosystem (n=33)

Section 5_Stakeholder List (Layer 2 Core)				
Stakeholder name	Organisation	Category (choose one)	Role in the ecosystem	Relevance (choose High, Medium, Low)
Ioanna Kourbela	Ioanna Kourbela Brand	Designers / Creators	Leading Greek fashion designer; sustainable materials advocate; natural fibres (organic cotton, linen, TENCEL™); Greek Cotton Project; sold in 28+ countries	High
ZEUS+DIONE	ZEUS+DIONE	Designers / Creators	Luxury heritage brand; uses Greek silk from Soufli; combines traditional craftsmanship with contemporary design; strong export orientation (80–90% overseas sales)	High
Parthenis / Orsalia Parthenis	Parthenis	Designers / Creators	Iconic Greek fashion house; natural fibres (wool, silk, cotton); timeless local production in Athens; 'chic sportif' aesthetic	High

3QUARTERS	3QUARTERS	Designers / Creators	Innovative sustainable fashion brand based in Athens; circular design principles; emerging brand profile	Medium
Vathos Apparel (Sofia Karayianni)	Vathos Apparel	Designers / Creators	Sustainable brand; uses GOTS-certified and Oeko-Tex certified materials; water-based dyes; transparent production	Medium
Ancient Kallos	Ancient Kallos	Designers / Creators	Brand integrating ancient Greek aesthetics into modern design; organic fabrics; biodegradable materials; local production	Medium
Yiorgos Eleftheriades	Yiorgos Eleftheriades Studio	Designers / Creators	Athens-based designer; eco-friendly fabrics; shown in Athens, Milan, Paris, Barcelona; geometric and structural silhouettes	Medium
Ancient Greek Sandals	Ancient Greek Sandals	SMEs / Brands / Startups	Greek footwear brand with strong international market presence; handmade sandals; cultural heritage positioning; exported globally	High
Callista Crafts	Callista Crafts	SMEs / Brands / Startups	Greek brand focusing on handcrafted accessories; combines traditional craftsmanship with contemporary aesthetics	Medium
Sirene Egeenne	Sirene Egeenne	SMEs / Brands / Startups	Sustainable swimwear and resort wear brand (est. 2020); eco-friendly materials; local Greek production; EEN-registered for international partnerships	Medium
Bleeker & Love	Bleeker & Love	SMEs / Brands / Startups	Greek accessories brand; vibrant prints; functional design; growing retail presence	Low

ART OF THE SILK MUSEUM	Soufli Silk Association / regional producers	Industry / Manufacturing / Suppliers	Soufli (Thrace) is the only European city with active silk production; supplies luxury Greek fashion brands (e.g. ZEUS+DIONE); represents a unique sustainable raw material asset	High
Greek Cotton Industry (central Macedonia / Thessaly)	Thrakika Ekkokkistiria S.A- cotton ginning & trading	Industry / Manufacturing / Suppliers	Greece is one of EU's largest cotton producers; organic cotton growing; supports brands like Ioanna Kourbela's Greek Cotton Project	High
AAS College – MA Design Fashion	AAS College Athens	Education / Research	Offers MA Design – Fashion; creative fashion practitioners; Athens-based private HEI; English-language programme	High
Mediterranean College – Fashion Design	Mediterranean College (Univ. of Derby franchise)	Education / Research	BA (Hons) Fashion Design & Marketing (Top-5 UK programme delivered in Athens/Thessaloniki); bilingual; integrates design and marketing	High
University of West Attica – Industrial Design & Production Engineering	University of West Attica (UNIWA)	Education / Research	Department of Industrial Design & Production Engineering; textile engineering content; Professor George Priniotakis is active in sustainable textiles research	High
NTUA – Circular Economy & Sustainability Institute (CESI)	National Technical University of Athens (NTUA)	Education / Research	UNESCO Chairholder on Green Innovation & Circular Economy; Prof. Konstantinos Aravossis (active in Athens Fashion Hackathon); cross-sector sustainability research	High

Athens University of Economics & Business (AUEB)	AUEB – Dept. Management Science & Technology	Education / Research	MSc programmes in Management Science & Technology and Digital Transformation; hosts Action Research Ecosystem Development work (Prof. Lekakos); engaged with FABRIX platform and Athens Fashion Hackathon	High
IEK AKMI / IEK ALFA / IEK Craft	IEK AKMI, IEK ALFA, IEK Craft (VET providers)	Education / Research	Major IEK-level vocational training providers offering fashion design and clothing construction programmes; EOPPEP-recognised diplomas; nationwide presence	Medium
Hellenic Fashion Industry Association (SEPEE / Greekfashion)	SEPEE	Policy / Associations / Support organisations	Largest apparel manufacturers association in Greece (est. 1973); HQ in Thessaloniki; member of Euratex and IAF; lobbying, information, fairs and trade missions	High
Hellenic Clothing Industry Association (HCIA)	HCIA	Policy / Associations / Support organisations	Non-profit; est. 1962 Athens; represents all clothing sub-sectors; complements SEPEE in policy dialogue	High
Hellenic Fashion Designers Association (HFDA)	HFDA	Policy / Associations / Support organisations	Official institution promoting Greek fashion industry globally; represents creative professionals; member of international fashion federations	High
Fashion Revolution Greece	Fashion Revolution Greece	Policy / Associations / Support organisations	National branch of the global Fashion Revolution movement; sustainability advocacy; Athens Fashion Hackathon; FABRIX platform; links to AUEB and international experts	High
Enterprise Greece	Enterprise Greece (Investment & Trade Agency)	Policy / Associations / Support organisations	National investment and trade promotion agency; promotes Greek products and companies internationally; fashion and creative industries outreach	Medium

Athens Xclusive Designers Week (AXDW)	Athens Fashion Week (AXDW)	Policy / Associations / Support organisations	Largest fashion event in Greece; twice-yearly; showcases established and emerging designers; recently participated in BRICS+ Fashion Summit; promotes Athens as a fashion city	High
Athens Fashion Trade Show	Fashion News S.A.	Policy / Associations / Support organisations	Biannual B2B trade fair at Metropolitan Expo; focuses on export collaboration, wholesale and commercial partnerships; January and September editions	Medium
General Secretariat for Research & Innovation (GSRI) / Elevate Greece	Greek Ministry of Development – GSRI	Policy / Associations / Support organisations	Manages national startup registry Elevate Greece; RIS3 strategy alignment; Horizon Europe NCP functions; innovation policy	Medium
Hellenic Association of Footwear Manufacturers and Exporters (ELSEVIE)	ELSEVIE	Policy / Associations / Support organisations	Represents 95 largest Greek footwear firms; export-oriented; sustainability interest growing; adjacent sector to fashion	Medium
ODE2Sucks	Ode to Socks	Designers / Creators	Greek accessories brand specialising in statement socks and playful fashion accessories; combines bold graphic design with local Greek production; growing social media presence and e-commerce reach; targets younger fashion-conscious consumer segment.	Low

Technical Chamber of Greece	Technical Chamber of Greece / Section of Central Macedonia	Policy / Associations / Support organisations	Statutory professional body representing all licensed engineers in Greece (est. 1923); Section of Central Macedonia is based in Thessaloniki; covers textile and industrial engineering professionals; involved in technical standardisation, professional licensing and industry-academia liaison; relevant for EU technical compliance and product regulation frameworks.	Medium
TCCI-EBETH	Thessaloniki Chamber of Commerce & Industry	Policy / Associations / Support organisations	One of the largest and most influential chambers of commerce in Greece (est. 1919); headquartered in Thessaloniki; supports business development, internationalisation and trade for SMEs across all sectors including fashion and textile; manages certification and documentation services; connects local businesses to EU funding instruments and international markets; active member of Eurochambers.	Medium
International Hellenic University of Greece	International Hellenic University of Greece - Department of Creative Design and Clothing	Education / Research	Department of Creative Design and Clothing at the International Hellenic University (IHU), based in Serres/Central Macedonia; public higher education institution offering undergraduate and postgraduate programmes in fashion design, clothing technology and creative design; combines design, technology and sustainability content; one of the few public HEI programmes directly relevant to the fashion and textile sector in Greece.	High

Access Fashion	ACCESS FASHION - ACCESS ABEE	SMEs / Brands / Startups	ACCESS Fashion is a leading fashion brand with a strong presence in Greek and European womenswear. ACCESS Fashion creates garments under the CYQLO label, using more environmentally responsible materials and certified raw materials such as GRS recycled polyester, natural fibres, and Lenzing materials. At the same time, they strive to build a more responsible supply chain and partnerships grounded in transparency and more conscious production practices.	Medium
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Annex B.2 - Portugal

Table 25: Stakeholders Identified in the Portuguese Regional Ecosystem (n=60)

Section 5_Stakeholder List (Layer 2 Core)				
Stakeholder name	Organisation	Category (choose one)	Role in the ecosystem	Relevance (choose High, Medium, Low)
Constança Entrudo	Constança Entrudo	Designers / Creators	Independent designer / creative brand with strong sustainability and material experimentation profile	High
Béhen	Béhen	Designers / Creators	Fashion brand rooted in craftsmanship, local production and cultural storytelling	High
Luís Carvalho	Luís Carvalho	Designers / Creators	Established designer with visibility in Portuguese fashion ecosystem	Medium
Lidija Kolovrat	Lidija Kolovrat	Designers / Creators	Established designer working across	Medium

			fashion and creative production	
Ricardo Andrez	Ricardo Andrez	Designers / Creators	Designer with recognised contemporary brand profile	Medium
Duarte Hajime	Duarte Hajime	Designers / Creators	Emerging designer with experimental and contemporary positioning	Medium
Roselyn Silva	Roselyn Silva	Designers / Creators	Emerging creative fashion voice	Medium
Alexandra Moura	Alexandra Moura	Designers / Creators	Established Portuguese fashion designer	Medium
Nuno Baltazar	Nuno Baltazar	Designers / Creators	Established designer / brand	Medium
Dino Alves	Dino Alves	Designers / Creators	Established designer known in Portuguese creative fashion scene	Medium
Positive Materials	Positive Materials	SMEs / Brands / Startups	Materials-focused fashion SME / innovation-oriented business	High

Isto	Isto	SMEs / Brands / Startups	Portuguese fashion brand with clean positioning and product focus	High
Smartex.ai	Smartex.ai	SMEs / Brands / Startups	Tech startup focused on AI / defect detection / production intelligence	High
Portuguese Flannel	Portuguese Flannel	SMEs / Brands / Startups	Portuguese brand connected to materials and manufacturing narrative	Medium
Gandaia	Gandaia	SMEs / Brands / Startups	Portuguese SME / brand with sustainability relevance	High
NAZ	NAZ	SMEs / Brands / Startups	Portuguese SME / brand with sustainability relevance	Medium
351	352	SMEs / Brands / Startups	Portuguese SME / brand with sustainability relevance	High
Toino Abel	Toino Abel	SMEs / Brands / Startups	Portuguese SME / brand with	Medium

			sustainability relevance	
Wetheknot	Wetheknot	SMEs / Brands / Startups	Design-led product / accessory brand	Medium
Tintex Textiles	Tintex Textiles	Industry / Manufacturing / Suppliers	Textile manufacturer with strong and sustainability and innovation positioning	High
RDD Textiles	RDD Textiles	Industry / Manufacturing / Suppliers	Textile manufacturer / supplier with strong ecosystem relevance	High
Valérius	Valérius	Industry / Manufacturing / Suppliers	Major industrial actor with innovation / sustainability relevance	High
Tintex	Tintex	Industry / Manufacturing / Suppliers	Existing actor already active in sustainability / bioeconomy ecosystem	High
Impetus Group	Impetus Group	Industry / Manufacturing / Suppliers	Established Portuguese manufacturing group	High
Riopele	Riopele	Industry / Manufacturing / Suppliers	Major textile producer with international market profile	High

TMG Textiles	TMG	Industry / Manufacturing / Suppliers	Large industrial textile group with diversified applications	High
Pizarro	Pizarro	Industry / Manufacturing / Suppliers	Textile / apparel production actor	Medium
Lameirinho	Lameirinho	Industry / Manufacturing / Suppliers	Home textiles / textile manufacturing actor	Medium
JF Almeida	JF Almeida	Industry / Manufacturing / Suppliers	Textile manufacturing company	Medium
Fitecom	Fitecom	Industry / Manufacturing / Suppliers	Textile manufacturing company	Medium
HATA	HATA	Industry / Manufacturing / Suppliers	Textile company linked to production ecosystem	Medium
Inovafil	Inovafil	Industry / Manufacturing / Suppliers	Yarn / textile production actor	Medium
Pafil	Pafil	Industry / Manufacturing / Suppliers	Textile manufacturing / upstream actor	Medium
Lopes & Carvalho	Lopes & Carvalho	Industry / Manufacturing / Suppliers	Industrial textile actor	Medium

Confetil	Confetil	Industry / Manufacturing / Suppliers	Textile production / finishing actor	Medium
Cork-a-Text / Corkatex	Cork-a-Text	Industry / Manufacturing / Suppliers	Innovation-oriented materials / yarn actor	High
Burel	Burel Factory / Burel	Industry / Manufacturing / Suppliers	Wool / heritage materials producer with design relevance	High
Faculdade de Arquitetura da Universidade de Lisboa	Faculdade de Arquitetura da Universidade de Lisboa	Education / Research	Higher education institution with relevance to fashion, design and creative education	High
Universidade Lusófona de Lisboa	Universidade Lusófona de Lisboa	Education / Research	Higher education institution with relevant design / fashion-related training capacity	Medium
IADE	IADE	Education / Research	Higher education institution focused on design, creativity and applied innovation	High
MODATEX Lisboa	MODATEX Lisboa	Education / Research	Vocational training institution specialised in textile, clothing and fashion sectors	High

ETIC	ETIC	Education Research	/	Creative and technical training institution with relevance to design and communication fields	Medium
Escola de Moda de Lisboa – E.P. Magestil	Escola de Moda de Lisboa – E.P. Magestil	Education Research	/	Specialised fashion education institution	Medium
ESAD Matosinhos	ESAD Matosinhos	Education Research	/	Design higher education institution with strong creative profile	High
MODATEX Porto	MODATEX Porto	Education Research	/	Vocational training institution specialised in textile, clothing and fashion sectors	High
Universidade Lusófona do Porto	Universidade Lusófona do Porto	Education Research	/	Higher education institution with potential relevance to design / communication / creative sectors	Medium
Escola de Moda do Porto	Escola de Moda do Porto	Education Research	/	Fashion-focused training institution	Medium
UBI	Universidade da Beira Interior	Education Research	/	Higher education institution with strong relevance to fashion /	High

			textile / design education	
Universidade do Minho	Universidade do Minho	Education Research	/ Higher education institution with major relevance for textiles, engineering and innovation	High
ModaPortugal / CENIT / ANIVEC	ModaPortugal / CENIT / ANIVEC	Policy Associations Support Organisations	/ Sector representation and policy / internationalisation interface	High
CCDR-LVT	CCDR-LVT	Policy Associations Support Organisations	/ Regional development and policy alignment actor	High
ATP	ATP – Associação Têxtil e Vestuário de Portugal	Policy Associations Support Organisations	/ Main industry association for textile and clothing sector	High
AICEP	AICEP	Policy Associations Support Organisations	/ Internationalisation and investment support agency	Medium
IAPMEI	IAPMEI	Policy Associations	/ SME and innovation support agency	High

		Support Organisations		
COMPETE 2030	COMPETE 2030	Policy / Associations / Support Organisations	Public funding / competitiveness programme authority	Medium
ANI	Agência Nacional de Inovação	Policy / Associations / Support Organisations	Innovation agency	Medium
Turismo de Portugal	Turismo de Portugal	Policy / Associations / Support Organisations	Public agency with relevance for creative economy / place branding	Medium
Câmara Municipal de Lisboa	Câmara Municipal de Lisboa	Policy / Associations / Support Organisations	Municipal actor with relevance for city- level support and visibility	Medium
Ministério da Economia	Government of Portugal	Policy / Associations / Support Organisations	National policy actor shaping industrial and competitiveness priorities	Medium
APPICAPS	APPICAPS	Policy / Associations / Support Organisations	Footwear cluster / association with sustainability and export experience	Medium

Annex B.3 – Romania

Table 26: Stakeholders Identified in the Romanian Regional Ecosystem (n=37)

Section 5_Stakeholder List (Layer 2 Core)				
Stakeholder name	Organisation	Category (choose one)	Role in the ecosystem	Relevance (choose High, Medium, Low)
Katty Fashion	Katty Fashion SRL	SMEs / Brands / Startups	Value Chain Leader & Sustainable Producer	High
DATSA Textil	DATSA TEXTIL SRL	SMEs / Brands / Startups	Sustainability- focused knitwear producer	High
IRCEM	Institutul pentru Cercetări în Economie Circulară și Mediu „Ernest Lupan”	Policy / Associations / Support organisations	Circular Economy capacity building	High
Caneparo	CANEPARO	Policy / Associations / Support organisations	Regional Cluster for innovation and competitivity	High

			in the hemp sector	
Mai Bine	Mai Bine Organization	Policy / Associations / Support organisations	Strategic Environmental Consultant	Medium
REDU	REDU Organization	Policy / Associations / Support organisations	Upcyclinig of textile waste	Medium
Irina Schrotter	EXCLUSIV COMP SRL	SMEs / Brands / Startups	Industry Leader & Ecosystem Architect	High
Unda Shapes	UNDA COLLECTIVE SRL	SMEs / Brands / Startups	Circular Fashion Brand & Upcycling Specialist	Medium
MERY STEM SRL		SMEs / Brands / Startups	Custom Tailoring & Made-to-Order Fashion SME.	Medium
Simoda	SIMODA RO SRL	SMEs / Brands / Startups	Local Fashion Brand & Clothing Manufacturer	Low

ELITTUDE SRL	ELITTUDE SRL	SMEs / Brands / Startups	Premium Made-to-Measure Brand & Circular Services Provider	Low
Poarta-ma cu flori	Poarta-ma cu Flori	SMEs / Brands / Startups	Natural Dyeing techniques	Low
Asociatia Romana pentru Reutilizare si Reciclare Textile (ARETEX)	Asociatia Romana pentru Reutilizare si Reciclare Textile (ARETEX)	Policy / Associations / Support organisations	National Coordinator for Textile Waste Management & Circular Infrastructure	High
Asociatia Fashion Revolution Romania	Asociatia Fashion Revolution Romania	Policy / Associations / Support organisations	National Advocacy Leader for Industry Transparency & Ethical Supply Chains.	High
Asociatia Ateliere Fara Frontiere	Asociatia Ateliere Fara Frontiere	Policy / Associations / Support organisations	Circular Economy & Social Integration Pioneer	High

Asociatia Textile Hub Romania	Asociatia Textile Hub Romania	Policy / Associations / Support organisations	Strategic Industry Facilitator & Design-to-Manufacturing Hub.	High
Fab Lab	ASOCIATIA FAB LAB IASI	Policy / Associations / Support organisations	Innovation Hub	High
Asociatia Ecoteca	Asociatia Ecoteca	Policy / Associations / Support organisations	Strategic Environmental Consultant & Waste Management Policy Expert.	Medium
ETNOCULTURA SRL	ETNOCULTURA SRL	Industry / Manufacturing / Suppliers	Major Textile Fabric Producer & Industry Consultant.	High
NICOTEX SRL	NICOTEX SRL	Industry / Manufacturing / Suppliers	Industrial Workwear & HoReCa Textile Manufacturer	High
VIADA SRL	VIADA SRL	Industry / Manufacturing / Suppliers	Established Fashion Manufacturer & Retailer.	High

CONFARG SA	CONFARG SA	Industry / Manufacturing / Suppliers	Established Fashion Manufacturer	Medium
Tricotur	TRICOTUR SRL	CONF Industry / Manufacturing / Suppliers	Workwear Manufacturer & Computerized Embroidery Specialist	Medium
INVICTUS FORCE&SAFE SA	INVICTUS FORCE&SAFE SA	Industry / Manufacturing / Suppliers	Specialized Tactical & Safety Apparel Manufacturer.	Medium
CHOTRONETTE	CHOTRONETTE SHOP SRL	Designers / Creators	Creative Designer Brand & Digital Fashion Pioneer.	High
HAYAZ COUTURE SRL	HAYAZ SRL	COUTURE Designers / Creators	Contemporary Avant-Garde Designer & Digital Brand	High
ANGE ATELIER DESIGN SRL	ANGE DESIGN SRL	ATELIER Designers / Creators	Contemporary Female Fashion Designer.	High

Ivana Store	S.C. Fabric Line S.R.L.	Designers / Creators	Contemporary Ethno-Design House.	High
ARINDA TAILOR SRL	ARINDA TAILOR SRL	Designers / Creators	Ethno- Creative Designer.	Medium
KATERINI	KATERINI ATELIER SRL	Designers / Creators	Premium Outerwear Designer & Artisan.	Medium
Romanian FATEX Council	Romanian Fashion Council Association	Policy / Associations / Support organisations	Support Association for fashion design	Medium
Faculty of Industrial Design and Business Management	Universitatea Tehnică „Gheorghe Asachi” din Iași	Education / Research	Primary Technical Knowledge Provider.	High
Faculty of Visual Arts and Design	George Enescu National University of Arts (UNAGE Iași)	Education / Research	Creative Talent & Aesthetic Research Hub. The main source of emerging designers in North-East Romania	High

INCDTP (National Research & Development Institute for Textiles)	INCDTP (National Research & Development Institute for Textiles)	Education / Research	National Authority for Material Science. This institute conducts cutting-edge research on fiber recycling and smart textiles, addressing the fact that only 1% of clothing material is currently recycled.	High
Faculty of Arts and Design.	West University of Timișoara (UVT)	Education / Research	Center for Experimental Fashion and Material Research.	Medium
Lucian Blaga University of Sibiu	Lucian Blaga University of Sibiu	Education / Research	Industrial Production & Textile Technology Specialist	Medium

Faculty of Decorative Arts & Design	National University of Arts Bucharest (UNARTE)	Education / Research	Strategic Creative Hub in the capital	High
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Annex B.4 – Spain

Table 27: Stakeholders Identified in the Spanish Regional Ecosystem (n=75)

Section 5_Stakeholder List (Layer 2 Core)				
Stakeholder name	Organisation	Category (choose one)	Role in the ecosystem	Relevance (choose High, Medium, Low)
Miriam Ponsa	Miriam Ponsa	Designers / Creators	Designer / brand with strong sustainability and material experimentation profile	High
Carlota Rodríguez Sala	Carlota Rodríguez Sala	Designers / Creators	Designer / brand with strong sustainability and community impact profile	Low
Rubearth	Gabriel Nogueiras	Designers / Creators	Avant garde and tech	Medium
Zoe Oms	Zoe Oms	Designers / Creators	Artisanal avant garde clothing	Medium
Nathalie Chandler	Nathalie Chandler	Designers / Creators	Parisian fashion, music culture, and modern minimalism	Low

SSIC and PAUL	SSIC and PAUL	Designers / Creators	Contemporaneous Fashion Brand Based in Barcelona	Low
MOMAMULAB	Mateus Sartori	Designers / Creators	jewelry avant garde	High
SCRY	SCRY	Designers / Creators	3d printed shoes and accessories	Low
Ingrid Pou	Ingrid Pou	Designers / Creators	Leather luxury bags	Low
Paloma Wool	Paloma Wool	Designers / Creators	Contemporary designer	Medium
Sylvia Calvo	Sylvia Calvo	Designers / Creators	Designer / brand with strong sustainability and recycling clothes profile	Low
Noni Barea	Noni Barea	Designers / Creators	Brand with strong sustainability and atemporal clothes profile	Medium

Inés Sistiaga	Inés Sistiaga	Designers / Creators	Textile designer combining material research, textile techniques and craft/industrial processes	Low
Mietis	María Fontanellas	Designers / Creators	Luxury bags	Low
Paula Ulargui	Paula Ulargui	Designers / Creators	Designer combining textiles and nature with strong sustainability profile	Low
Studio Cumbre	Micaela Clubourg	Designers / Creators	responsible contemporary sustainable fashion	High
Ade de Canela	Gabriela Lotaif	Designers / Creators	unique accessories, 3D printing	High
MODA22	Moda22 Makers	Designers / Creators	A modern, family-run and technologically-advanced factory, with 50 years of experience specializing in apparel and softgoods.	High

Sita Murt	Sita Murt	SMEs Brands Startups	/ / /	Women's knitwear	Medium
Naulover	Naulover	SMEs Brands Startups	/ / /	Spanish Luxury brand	Medium
Joplin Atelier	Joplin Atelier	SMEs Brands Startups	/ / /	a modern atelier where slow luxury meets western romance.	Medium
Alaire	Aliare	SMEs Brands Startups	/ / /		Medium
Lebor Gabala	Lebor Gabala	SMEs Brands Startups	/ / /	Women's fashion	Medium
THINKING MU	THINKING MU	SMEs Brands Startups	/ / /	regenerative and organic materials fashion brand	High
Pattern Laboratory	PATLAB	SMEs Brands Startups	/ / /	Pattern development and fashion prototypes study	High

Back to Eco	Back to Eco	SMEs Brands Startups	/ /	Brand with strong sustainability and recycling clothes profile	Medium
Brava Fabrics	Brava Fabrics	SMEs Brands Startups	/ /	Brand with strong sustainability and ethical profile	Medium
Marcelinus	Marcelinus	SMEs Brands Startups	/ /	Brand specialized in knitwear inspired by traditional designs with contemporary twist and locally produced	Medium
Munich	Munich	SMEs Brands Startups	/ /	Brand specialized in sports shoes, apparel and accessories	High
Iaios	Iaios	SMEs Brands Startups	/ /	Brand with strong sustainability, 100% recycled sweaters and locally produced	Medium
Ananas Anam	Ananas Anam	SMEs Brands Startups	/ /	Brand producing vegan leather from pineapple leaves	Medium

Polybion	Polybion	SMEs / Brands / Startups	Biotechnological company producing bacterial cellulose as a sustainable and vegan alternative to animal leather	Medium
Clotsy	Clotsy	SMEs / Brands / Startups	Brand with strong sustainability, vegan and locally produced	Medium
Punto Blanco	Punto Blanco	SMEs / Brands / Startups	SME lingerie and hosiery	High
Hilaturas Jesús Rubió	Hilaturas Jesús Rubió	Industry / Manufacturing / Suppliers	Manufacturing high-quality yarns	High
Hilaturas Arnau	Hilaturas Arnau	Industry / Manufacturing / Suppliers	Manufacturing yarns and technical fabrics	High
Egarfil	Egarfil	Industry / Manufacturing / Suppliers	Manufacturing long-staple combed yarns	High
Hilosa	Hilosa	Industry / Manufacturing / Suppliers	Manufacturing yarns from recycled cotton	High

Triturats La Canya	Triturats La Canya	Industry / Manufacturing / Suppliers	Textile fiber mechanical recycling	High
Pages Valentí	Pages Valentí	Industry / Manufacturing / Suppliers	Manufacturing yarns from recycled and regenerated cotton	High
Organic Cotton Colours	Organic Cotton Colours	Industry / Manufacturing / Suppliers	Fashion and textile production using 100% organic and regenerative cotton, without dyes or chemical processes	High
Kniterate	Kniterate	Industry / Manufacturing / Suppliers	Digital 3D knitting machine supplier	Medium
Shimasheiki	Shimasheiki	Industry / Manufacturing / Suppliers	Digital 3D knitting machine supplier	High
Kinno Design	Kinno Design	Education / Research	Innovation and textile design consultant specialized in 3D knitting technology	Low
LCI Barcelona	LCI Barcelona	Education / Research	Higher education institution with strong relevance to fashion, textile and design education	Medium

Bau	Bau	Education Research	/ Higher education institution with strong relevance to fashion, textile and design education	Medium
IED Barcelona	IED Barcelona	Education Research	/ Higher education institution with strong relevance to fashion and design education	Medium
Technical Advice	Technical Advice	Education Research	/ Consulting firm that optimizes production processes and product development through innovation and sustainability	High
Intexter	Intexter	Education Research	/ Technological center that researches and develops innovative and sustainable solutions for fashion and textile industry	High
Aitex	Aitex	Education Research	/ Technical institute offering certification, R&D and consulting services for the fashion industry	High
Fitex	Fitex	Education Research	/ Technological center specialized in the fashion and apparel industry	Medium

Eurecat	Eurecat	Education / Research	Technological center promoting applied research, digitalization and sustainability in the fashion and textile sector	High
Leitat	Leitat	Education / Research	Technological center specialized in innovation and consulting lab, helping brands develop new materials and comply sustainability regulations	High
ESDI – Escola Superior de Disseny	ESDI – Sabadell	Education / Research	Fashion Design, Fashion Management, Styling, Pattern Making, Textile-related design, Product Design	High
ESDAPC – Escola Superior de Disseny i d'Arts Plàstiques de Catalunya	ESDAPC – Escola Superior de Disseny i d'Arts Plàstiques de Catalunya	Education / Research	Fashion Design, Product Design, Graphic Design	High
ERAM – Escola Universitària de les Arts	ERAM – Escola Universitària de les Arts	Education / Research	Fashion, Visual Arts, Creative Industries	High
Universitat Politècnica de Catalunya	UPC	Education / Research	Textile engineering, materials, industrial engineering	High
Reimagine textiles	TecnoCampus Mataró	Policy / Associations / Support organisations	its an incubator	High

Move!	Move!	Policy / Associations / Support organisations	Spain's leading platform and forum, powered by Modaes	High
Modaes	Modaes	Policy / Associations / Support organisations	Major institutional platform created and supported by various organizations in Spain's fashion industry, ranging from design, garment production, and manufacturing to distribution and retail	High
Cluster Texfor	Cluster Texfor	Policy / Associations / Support organisations	Spanish Textile Industry Confederation	High
Cluster Textil Mataro	Cluster Textil Mataro	Policy / Associations / Support organisations	Cluster of companies and workshops in Maresme region specilized in knitwear and apparel	Medium
Cluster Modacc	Cluster Modacc	Policy / Associations / Support organisations	Cluster that brings together companies and stakeholders in the textile and fashion value chain	High
Cluster Textils.cat	Cluster Textils.cat	Policy / Associations / Support organisations	Cluster specilized in advanced textile materials to drive innovation and the green transition	Medium

Cluster Cointega	Cluster Cointega	Policy / Associations / Support organisations	Cluster of Galician companies operating across the value chain	High
Observatorio Textil y Moda	Observatorio Textil y Moda	Policy / Associations / Support organisations	Organization launched by Confederación ModaEspaña and Spanish Intertextile Council	High
Aitpa	Aitpa	Policy / Associations / Support organisations	Spanish trade association representing companies in the cotton textile sector	High
MODA FAD	FAD	Policy / Associations / Support organisations	collective of professionals from the different areas of fashion, with the enthusiasm to promote and give visibility to creators, to fashion businesses and to new talent, fostering a positive impact and sustainability.	High
*080 Barcelona Fashion	generalitat	Policy / Associations / Support organisations	Barcelona's Fashion Week	High
Madrid Fashion Week	IFEMA	Policy / Associations / Support organisations	Madrid's Fashion Week	High

Barcelona Fashion Forward	Barcelona Activa	Policy / Associations / Support organisations	a program that aims to promote and accompany emerging fashion designers and brands.	High
MODA ESPAÑA	Confederación ModaEspaña	Policy / Associations / Support organisations	An institutional platform created and supported by different institutions of the fashion sector in Spain aims to bring together the entire fashion value chain of our country	Low
Fedecon	Federación Española de Empresas de la Confección y Moda	Policy / Associations / Support organisations	a non profit entity that represents the Spanish Clothing Industry,	Low
CIE	Centro de Información Textil y de la Confección	Policy / Associations / Support organisations	an organization formed by associations and business federations of the textile sector, at the national level,	Low
MOMAD	Madrid Fashion Fair	Policy / Associations / Support organisations	international trade fair for fashion, footwear, and accessories	Medium