



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

# Country factsheet

Serbia

An initiative of the European Union





## Contents

Contents.....	2
Introduction.....	3
1. National cluster policy, programmes and initiatives.....	5
2. State of play of cluster policy .....	9
Bibliography.....	12



## Introduction



This document presents an overview of the cluster policy in Serbia. Given its importance to contextualise the cluster policies (and related) analysed in the factsheets, a comprehensive outlook of the country can be consulted in the [Serbia 2020 Report](#), which highlights the country's recent developments, economic outlook and the state of play of its relations with the EU.

# 01

## National cluster policy, programmes and initiatives



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



## 1. National cluster policy, programmes and initiatives

Policy type:	Broad policy
Policy name:	Industrial Policy Strategy of the Republic of Serbia (2021-2030) Foreign Trade Policies/internationalisation
<p><b>POLICY OBJECTIVES</b></p> 	<p><b>Supporting internationalisation activities</b></p> <p><b>Fostering R&amp;D activities, technology development and implementation</b></p> <p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Promoting social and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p> <p><b>Connect to global supply chains</b></p> <p>The Industrial Policy Strategy of the Republic of Serbia (2021-2030) and Smart Specialisation Strategy of the RS (2020-2027) are the key reference documents, including cluster policy in the broad policy concept. Both documents state that the association of companies through clusters is under-developed, but it represents an important opportunity for the improvement of the economic competitiveness (in particular regarding the cooperation between the industry and IT clusters on digital modernising of staff and companies, as well as, support to the modernisation of manufacturing production process and job skills via industrial, institutional infrastructure projects. The Industrial Policy is sector sector-neutral, and it needs to be harmonised with selected policy areas under Smart Specialisation Strategy (i.e. information and communication technologies, production and processing of food and beverages, creative industries, production of machines and electric devices, environmental protection and energy efficiency, key enabling technologies) with objectives to achieve the economic growth supported through R&amp;D, better education focused on innovations and entrepreneurship, improved business environment through optimisation and digitalisation, and internationalisation of the economy through involvement in regional and global value chains.</p>
<p><b>POLICY FOCUS</b></p> 	<p><b>No specific focus</b></p> <p>The Industrial Policy is sector sector-neutral, but it needs to be harmonised with selected policy areas under Smart Specialisation Strategy (i.e. information and communication technologies, production and processing of food and beverages, creative industries, production of machines and electric devices, environmental protection and energy efficiency, key enabling technologies)</p>



<b>RESPONSIBLE AUTHORITIES</b> 		<b>Both drafting and implementation</b>  Ministry of Economy
<b>BENEFICIARIES</b> 		<b>Cluster organisations</b> <b>SMEs</b> <b>Research organisations</b> <b>Academic institutions</b> <b>Start-ups</b> <b>Business associations</b> <b>Large firms</b> <b>Technology centres</b>  The Industrial Policy Strategy refers to different stakeholders coming from business, research , education with particular focus on the development of R&D clusters for the next decade (2021-2030).
<b>INSTRUMENTS</b> 	<b>Financial</b>	<b>Funding collaboration initiatives</b> <b>Support to R&amp;D projects</b>
	<b>Technical assistance</b>	<b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b> <b>Support for soft skills development: coaching, management training, upskilling/reskilling</b>
	<b>Explanation</b>	The creation of R&D clusters as an objective should be supported with greater focus on entrepreneurial education and culture, English language skills, creating joint innovation projects between the private sector and R&D organisations and improved science and technology transfer. The strategy mentions, in particular, three programs: "Promotion of industrial digital transformation", "Incentive programmes aimed at strengthening of the industry staff digital skills through informal education system", "Support to development and improvement of production processes via industrial institutional infrastructure projects".
	<b>Period</b>	<b>Limited period</b>



<b>HISTORY</b> 	<b>Ending year</b> (for policies with limited period)	2030
	<b>Starting year</b>	2021
	<b>Explanation</b>	<p>Since 2005/2006 the Serbian government supported the policies that resulted in the creation of first clusters in Serbia (i.e. automotive, plastics and rubber, small agricultural machines, wood and IT software industry). The cluster policy was mentioned in national Economic Development Strategy (2006-2012). Afterwards, in 2007, the Serbian government and the GTZ / GmbH started together the project on the clusters development that had triggered the inclusion of cluster policy in national strategy for SMEs Development &amp; Action Plan (2008 - 2013) and the successive strategy for the period (2015-2020). The SME strategy beyond 2020 is not published yet. Due to the lack of national cluster policy, the cluster policy of the Republic of Serbia is the part of national SMEs strategy and it is depending on the timeframe of strategy and annual budget allocation. Clusters policy is currently part of "Industrial Policy Strategy of the RS (2021-2030)" and "Smart Specialisation Strategy of the RS (2020-2027)".</p>
<b>BUDGET</b> 	<b>Overall</b>	N/A
	<b>Annual</b>	N/A
	<b>Source of funding</b>	<p>Cluster policy is financed by the state budget. However, there are other sources for clusters financing beyond the state budget (i.e. industry, EU funds, foreign states aid etc.)</p>
<b>POLICY EVALUATION</b> 	<b>Availability</b>	<b>No policy evaluation</b>
	<b>Results</b>	<p>There is no policy evaluation of "Development Strategy. &amp; Action plan (2015-2020)". On the other hand, the SME Development strategy and Action Plan (2015-2020) provides "an overview of implementation strategy (2008-2013)", but it only states how much money was spent on "Program of support to development of innovation clusters" (i.e. RSD 113.6 million or EUR 966,118) during 5-years-period. No additional information is provided on potential impacts. However, another independent study, written by InTER (i.e. Institute for Territorial Economic Development), local think tank, provided more detailed analysis of clusters development under "Program of support to development of innovation clusters" for the period 2007-2015. (see in bibliography, Clusters 10 years later, Analysis of Effect of Program for Clusters Development (2007-2015))</p>
<b>POLICY ALIGNMENT WITH THE EU</b> <b>PRIORITIES</b>		

# 03

## State of play of cluster policy



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



## 2. State of play of cluster policy

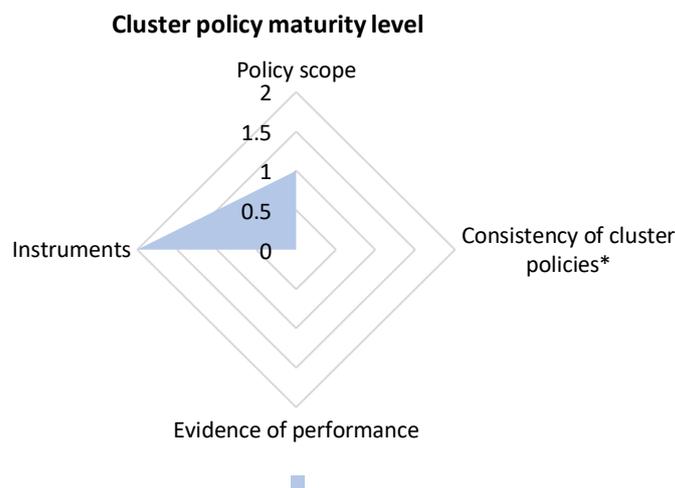
The data below illustrates how the country ranks in terms of maturity of cluster policy. The maturity index is based on a combination of factors presented in Chapter 1 and which are scored based on their existence:

- **Policy scope:** whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies (existence of broader policies = 1 point; existence of targeted cluster policies = 2 points)
- **Consistency of cluster policies:** assessment of the duration and experience of the country in doing cluster policies. This dimension assesses only existing cluster policies and not broader policies (no cluster policies available = 0 points; < 10 years of experience or > 10 years (but interrupted) = 1 point; > 10 years (but with clear continuity = 2 points)
- **Evidence of performance:** the existence of monitoring and evaluation mechanisms determines the degree of policy development in the country (no evaluations = 0 points; existence of evaluations of past policies or in-itinere = 0.5 points; existence of ex-ante and/or ex-post evaluations = 0.5 points)
- **Instruments:** whether the policies provide any instruments to support the policy implementation, being these financial and/or technical assistance (1 point for each type of instrument available)

It is important to note that the maturity does not reflect the performance of a country, but only the degree of development of their cluster policy at the moment when the data was collected (2020). The maturity index illustrates how the country scores for each of these four dimensions (policy scope, consistency of cluster policies, evidence of performance and instruments) compared to the maximum score that they can reach.

	Serbia	Maximum score
Policy scope	1	2
Consistency of cluster policies*	0	2
Evidence of performance	0	1
Instruments	2	2

\* This dimension is scored solely if the country has a dedicated cluster policy and it assesses only cluster policies



### State of play of cluster policy in the country

#### Policy evaluation (for terminated policies)

#### No policy evaluation

There is no policy evaluation of "Development Strategy. & Action plan (2015-2020)". On the other hand, the SME Development strategy and Action Plan (2015-2020) provides "an overview of implementation strategy (2008-2013)", but it only states how much money was spent on "Program of support to development of innovation clusters" (i.e.



	<p>RSD 113.6 million or EUR 966,118) during 5-years-period with no information on the impacts. However, another independent study, written by INTER (i.e. Institute for Territorial Economic Development), local think tank, provided more detailed analysis of clusters development under ‘‘Program of support to development of innovation clusters’ for the period 2007-2015. (see in bibliography, Clusters 10 years later, Analysis of Effect of Program for Clusters Development (2007-2015)). The study provides following insights: the effects of clusters did not increase significantly productivity and competitiveness of SMEs (i.e. since 2012 Program was allocated less funding than previous years, allocated funds were not sufficient for achieving goals, administrative burden, inconsistent project selection criteria); Program did not have equal treatment towards different sectors (i.e. program did not have any sector focus, the gap between funds allocation between different sectors), small number of clusters received majority of available funding (i.e. 11,1 % of registered clusters received 54% of whole budget, moreover, only 7 clusters received 62,5% of budget); program contributed to greater visibility of clusters and fostered networking and joint activities between firms; better cooperation between members of clusters and contact with Academic/Research institutes; program had positive effect on the cluster development at early stage while it did not have significant role in supporting more consolidated clusters; clusters have a few personnel (i.e. on average 2 people per cluster), so the operational capacity of cluster is limited. Overall, the Program achieved its goal that was introducing clusters and fostering their development before organisational consolidation. However, ‘consolidated’ clusters should be included in relevant national strategies and sector policy developments.</p>
<p><b>Policy approach in the country</b></p>	<p><b>Policy support for the activities of cluster organisations</b></p>
<p><b>Continuity</b></p>	<p>Since 2005/2006 the Serbian government supported the creation of first clusters (i.e. automotive, plastics and rubber, small agricultural machines, wood and IT software industry). The cluster policy was mentioned in national Economic Development Strategy (2006-2012). Afterwards, in 2007, the Serbian government on the proposal of the Ministry of Economy and Economic Development commissioned a “project to encourage the development of clusters in Serbia” from the German firm Gesellschaft für Technische Zusammenarbeit GTZ / GmbH. The project triggered the inclusion of clusters in national strategy for SMEs Development and Action Plans (2008 - 2013) and successive period (2015-2020). The first Action Plan (2008-2013) mentions cluster policy under 4th pillar with title "Competitive advantages of SMEs on export markets" while the second Action Plan (2015-2016) mentions it under 4th pillar, "Encouraging business associations and creation of the chain of values". At first national cluster policy was oriented supporting activities relevant to initial and early development of cluster. "Program to development of innovative clusters" financed the following activities regarding the early stage development of cluster: covering operational costs (i.e. office rent, personnel etc.), networking between cluster members, courses for acquiring knowledge and skills for operating in EU market, seminars, courses, knowledge exchange between cluster members, developing common cluster service, project support for infrastructural projects, service or goods associated with cluster, testing production, new product design, prototypes, protection of intellectual property rights, fair and promotion activities. As the part of "Program of support to development of innovative clusters", (2008-2016) the beneficiaries of cluster policy from state funding were only clusters. Clusters are independent registered organisation and the composition of cluster should include at least 12 enterprises (i.e. 60% should represent micro, small, medium enterprises) and three institutions for support (i.e. Research/Academia/Innovation) (i.e. obligatory one Science/Research organisation). The last stage of program implementation on innovative clusters (2015-2016) envisages the continuation of the program of financial support for cluster development, with particular emphasis on the development of joint products and joint bids for the export markets. The National Agency for Regional Development (i.e. NAIR) implemented the program that was directly targeting the clusters development and early stage consolidation (2008-2016) (annually approved) while from 2017 and onwards (i.e. 2020) it started with the implementation of new "Program on standardised service for micro, small and medium enterprises", where the support for clusters are mentioned alongside the support of micro, small and medium enterprises (annually approved, too). The Industrial Policy Strategy of the RS (2021-2030) and Smart Specialisation Strategy of the RS (2020-2027) are the key reference documents, including cluster policy in the new decade (2021-2030). The strategy aims to ensure industrial digital transformation. Regarding the role of clusters in pursuing this objectives, the strategy proposes closer collaboration between traditional sectors and ICT clusters and development of new R&amp;D clusters.</p>
<p><b>Consistency</b></p>	<p><b>No cluster policy available</b></p> <p>Serbia does not have a cluster policy and cluster creation/development is supported through a broad policy.</p>

# Bibliography



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



## Bibliography

Serbia makes progress in negotiation chapter 20 after the adoption of new Industrial Strategy (2021-2030), available at: <https://europeanwesternbalkans.rs/usvajanjem-nove-strategije-industrijske-politike-napravljen-napredak-u-poglavlju-20/>

Industrial Policy Strategy of the Republic of Serbia covering the period from 2021 to 2030, available at: <https://privreda.gov.rs/wp-content/uploads/2020/05/Industrial-Policy-Strategy-2021-2030.pdf>

Smart Specialisation Strategy of the Republic of Serbia (2020-2027), available at: <https://pametnaspecijalizacija.mpn.gov.rs/wp-content/uploads/2020/09/Smart-Specialization-Strategy-of-the-RS-for-the-period-2020-to-2027.pdf>

Program on standardised service for micro, small and medium enterprises (2020), Development Agency of Serbia, available at: <https://ras.gov.rs/razvoj-preduzetnistva/projekti-1/program-standardizovanog-seta-usluga-za-mikromala-i-srednja-preduzea-i-preduzetnike#> and <https://www.pravno-informacioni-sistem.rs/SlGlasnikPortal/eli/rep/sgrs/vlada/uredba/2020/5/7/reg>

SME Development Strategy and Action Plan 2015 -2020 (2015) Ministry of Economy of the Republic of Serbia, available at: [www.privreda.gov.rs/wp-content/uploads/2017/01/Strategija-I-Plan\\_eng\\_poslednje.pdf](http://www.privreda.gov.rs/wp-content/uploads/2017/01/Strategija-I-Plan_eng_poslednje.pdf)

Program to support internationalisation of enterprises and clusters (2016), Development Agency of Serbia, available at: [www.ras.gov.rs/uploads/2016/04/javni-poziv-za-internacionalizaciju-27-april-2016.pdf](http://www.ras.gov.rs/uploads/2016/04/javni-poziv-za-internacionalizaciju-27-april-2016.pdf)

SME clustering in Serbia : finding the right business partners and improving the business environment for SMEs (2016) Đuričin Sonja, Beraha, Isidora, available at: <https://core.ac.uk/download/pdf/79431365.pdf>

Clusters 10 years later, Analysis of Effect of Program for Clusters Development (2007-2015) (2016), Jasna Zarkovic, Dragan Mijacic, Tatjana Sovrljic, InTer, available at: [www.lokalnirazvoj.org/upload/Publication/Documents/2016\\_11/2016\\_Klasteri\\_desetak\\_godina\\_kasnije.pdf](http://www.lokalnirazvoj.org/upload/Publication/Documents/2016_11/2016_Klasteri_desetak_godina_kasnije.pdf)

Clusters 10 years later, Analysis of Effect of Program for Clusters Development - PPT (2016), InTer, available at: [www.lokalnirazvoj.org/upload/News/Documents/2016\\_11/Prezentacija\\_InTER\\_Analiza\\_Programa\\_podrs\\_ke\\_razvoju\\_klastera\\_24\\_11\\_16.pdf](http://www.lokalnirazvoj.org/upload/News/Documents/2016_11/Prezentacija_InTER_Analiza_Programa_podrs_ke_razvoju_klastera_24_11_16.pdf)

Clusters as business model for achieving sustainable and competitive economy in Serbia, (2016) PhD Thesis EDUKONS University, Marija Gacic, available at: <https://educons.edu.rs/wp-content/uploads/2016/02/Marija-Gacic-doktorska-disertacija.pdf>

CBC SER-BG Cluster Development Strategy through Bulgaria-Serbia IPA cross border programme (2016), Balkan Cluster, available at: [http://balkancluster.clusterhouse.rs/wp-content/uploads/2015/06/CBC-SER-BG-Cluster-Development-Strategy\\_SER\\_ENG.pdf](http://balkancluster.clusterhouse.rs/wp-content/uploads/2015/06/CBC-SER-BG-Cluster-Development-Strategy_SER_ENG.pdf)

Public call for grants for innovative clusters (2015), National Agency for Regional Development, available at: <http://rrappr.rs/klasteri/>

Waiting for strategy and greater state support (2015), Danas, available at: [www.danas.rs/ekonomija/cekajuci-strategiju-i-vecu-podrsku-drzave/](http://www.danas.rs/ekonomija/cekajuci-strategiju-i-vecu-podrsku-drzave/)

Memorandum of Understanding on multilateral Serbian-Czech-Russian-Romanian-Hungarian cluster cooperation (2015), available at: <https://blacksea-horizon.eu/object/document/362>



Public call for grants for innovative clusters (2013), National Agency for Regional Development- Obrenovac regional network, available at:  
<https://obrenovac.rs/?p=3804>

Clusters development strategy in Serbia (2013), Srdjan Redzepagic, ERIEP, available at:  
<http://revel.unice.fr/eriep/index.html?id=3488#tocto1n3>

SME Development Strategy and Action Plan 2008 -2013 (2008), Government of the Republic of Serbia, available at:  
[www.pravno-informacioni-sistem.rs/SlGlasnikPortal/extref/c1817451-c972-4d55-84b9-5d4af70e1a8d&actid=&regactid=398636&doctype=reg&latest=true](http://www.pravno-informacioni-sistem.rs/SlGlasnikPortal/extref/c1817451-c972-4d55-84b9-5d4af70e1a8d&actid=&regactid=398636&doctype=reg&latest=true)