



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Slovenia

An initiative of the European Union





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Introduction



This document presents an overview of the cluster policy in Slovenia. Given its importance to contextualise the cluster policies (and related) analysed in the factsheets, a comprehensive outlook of the country in socioeconomic terms can be consulted in the [European Semester Country Report for Slovenia](#).

The European Semester was an instrument introduced to coordinate the EU Member States economic policies and address the economic challenges faced by the EU. Its goals are “to ensure sound public finances, to prevent excessive macroeconomic imbalances in the EU, to support structural reforms to create more jobs and growth, and to boost investment”. Thus, it focuses on the following areas: business environment; financial and fiscal stability; green economy; public administration; labour market and skills; and, social protection and cohesion.

01

Industrial ecosystems and cluster landscape



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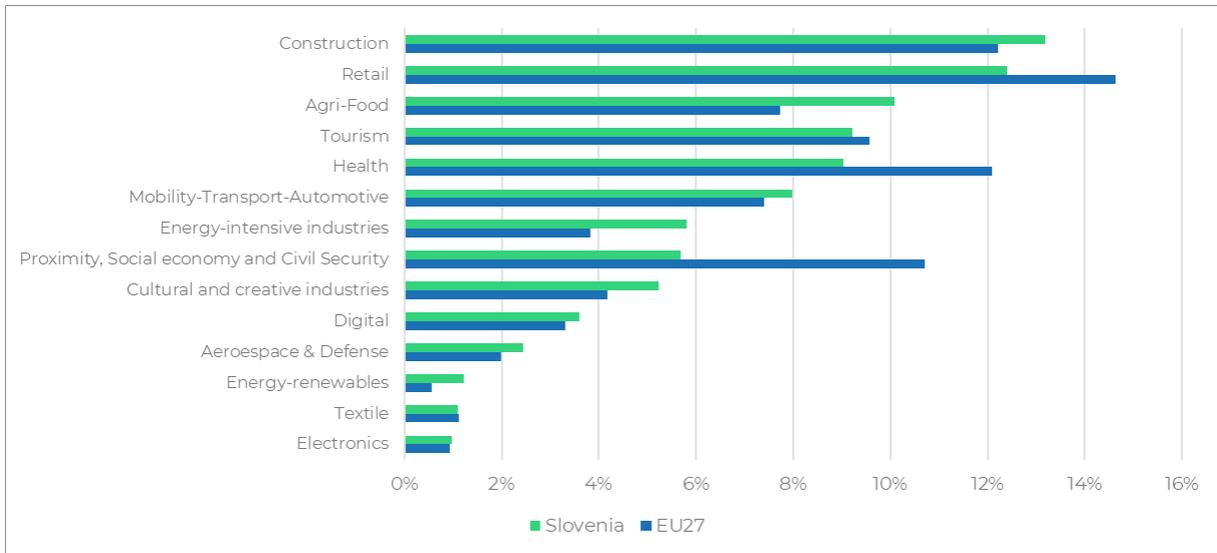


1. Industrial ecosystems and cluster landscape

Employment in the 14 ecosystems in the country

As part of its Industrial Strategy (March 2020), the European Commission has selected 14 industrial ecosystems that are particularly relevant in Europe and encompass all players operating in a value chain. The following graph shows the proportion of the country’s employment accounted for by each ecosystem, as well as the equivalent figure for the EU27 on average. The ecosystems are ordered, from top to bottom, according to the amount of employment in the country. When the bar for the country is higher than that of the EU27, it indicates that the country is more specialised in that ecosystem.

Graph 1: Employment in the ecosystems



Source: Own elaboration from Eurostat and National Statistical Offices



Regionally relevant nodes

Economic activity, and therefore employment, is not equally distributed in all regions. Specialisation can be measured through Location Quotients (LQ) that reflect the relative specialisation of an activity in a region compared to the EU average. If the LQ for a given activity-region combination is above 1.5, it is considered a specialisation node, and if the activity accounts for at least 1 % of total employment in the region, it is considered regionally relevant. The following tables show the total number of regionally relevant specialisation nodes in each region in the country and identifies the top five most specialised of these nodes. The first table focuses on the 88 NACE 2-digit activities or sectors, totalling 15 in the country, while the second table is based on the 14 ecosystems, which total 5 in the country.

Table 1: Regionally relevant sectoral nodes

Region	Number of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
SI03: East Slovenia	8	C21 - Manuf. of pharmaceuticals	C27 - Manuf. of electrical equipment	C25 - Manuf. of fabricated metal products	C16 - Manuf. of wood products	C22 - Manuf. of rubber & plastic products
SI04: West Slovenia	7	C27 - Manuf. of electrical equipment	K65 - Insurance, pension funding	R90 - Arts & entertainment	M70 - Head offices, management consult.	C24 - Manuf. of basic metals

Source: Own elaboration from Eurostat and National Statistical Offices

Table 2: Regionally relevant ecosystem nodes

Region	Number of nodes	Node 1	Node 2	Node 3
SI03: East Slovenia	3	Energy-renewables	Energy-intensive industries	Agri-Food
SI04: West Slovenia	2	Energy-renewables	Cultural and creative industries	-

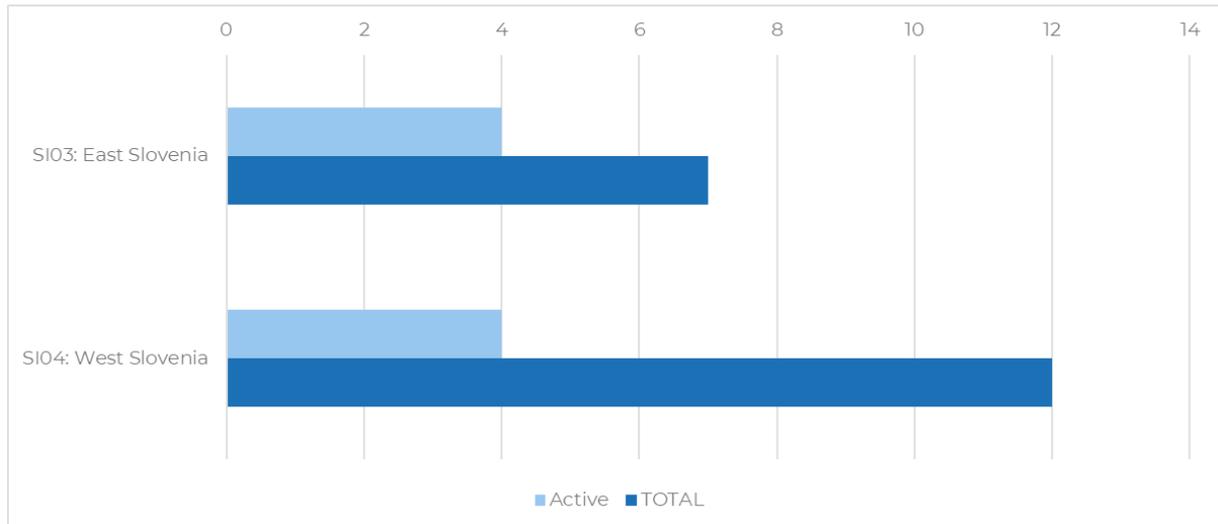
Source: Own elaboration from Eurostat and National Statistical Offices



Cluster organisations in the regions

There are 19 cluster organisations registered on the ECCP in the country, 8 of which can be considered active on the ECCP, having updated their profiles during the first half of 2021. The following graph shows the presence of cluster organisations in the different regions.

Graph 2: Cluster organisations profiled and active on the ECCP



Source: Own elaboration from Eurostat and National Statistical Offices

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National cluster policy, programmes and initiatives



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2. National cluster policy, programmes and initiatives

Policy type:	Broad policy
Policy name:	Strategic Research and Innovation Partnerships (SRIPs) RIS3, smart specialisation strategy
<p>POLICY OBJECTIVES</p> 	<p>Strengthening cooperation between companies or industry and RTDI actors.</p> <p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Supporting internationalisation activities</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Supporting cluster excellence and professionalisation of cluster management</p> <p>Supporting the consolidation of existing cluster organisations</p> <p>Promoting entrepreneurship, start-ups and spin-offs</p> <p>Promoting employment and upgrading skills and competences</p> <p>Enhancing territorial cohesion (through RIS3)</p> <p>Connect to global supply chains</p> <p>Strengthening the network of cluster organisations/cross-clustering</p> <p>Strategic Research and Innovation Partnerships (SRIPs) are elements of the Slovenian Smart Specialisation Strategy to foster innovation and economic development in the niche areas of the Slovenian economy. According to the Slovenian Smart Specialisation Strategy (S3), the cooperation between stakeholders in SRIPs is built on coordination of R&D activities, sharing of capacities, development of human resources, exchange of knowledge and experience, networking and collective representation of interest abroad. SRIPs are a type of clusters organisations, displaying similar features such as the creation of a space for innovation, consisting of companies, development teams and universities specializing in a specific industry or field. STRIPs can therefore be understood as cluster organisations, although they are not named as such. Compared to typical definition of cluster development, SRIPs in Slovenia are still 'broader' formation in terms of the covered field of industry. For example, SRIP in Health-medicine domain does not cover collaboration only in the medicine</p>



	sector, but also includes (bio)pharmacy, cosmetics, etc. Similar holds for the SRIPs in other domains. SRIPs are thus very broad interest groupings and are also referred as such in national texts.
POLICY FOCUS 	<p>Sectoral</p> <p>SRIPs are established across nine main areas identified in the Smart Specialisation Strategy. In all these nine areas, a SRIP (=cluster) has been established. The nine areas are: 1) Smart cities and communities, 2) Smart building and homes, including wood chain, 3) Networks for the transition into circular economy, 4) Sustainable food production, 5) Sustainable tourism, 6) Factories of the Future, 7) Health-medicine, 8) Mobility and 9) Development of materials as products.</p>
RESPONSIBLE AUTHORITIES 	<p>Both drafting and implementation</p> <p>Provides funding</p> <p>Oversees the implementation</p> <p>The coordination of Slovenian Smart Specialisation Strategy (S3) and of SRIPs are done by Government office for development and European Cohesion Policy.</p>
BENEFICIARIES 	<p>Research organisations</p> <p>Academic institutions</p> <p>Technology centres</p> <p>NGOs</p> <p>Cluster organisations</p> <p>SMEs</p> <p>Large firms</p> <p>Business associations</p> <p>Policy makers</p> <p>SRIPs are long-term partnerships between (1) business community, (2) research organisations, (3) state and municipalities, and (4) facilitators, innovation users and NGOs – so-called quadruple helix - to pool investment and knowledge of Slovenian stakeholders, and help the stakeholders set up a comprehensive innovation ecosystem with the aim of entering global markets and improving the position in S4 priority areas.</p>



INSTRUMENTS 	Financial	<p>Support to R&D projects, SMEs becoming cluster members, etc.</p> <p>Funding collaboration initiatives</p> <p>Financing networking events</p> <p>Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)</p> <p>Financing start-ups</p>
	Technical assistance	<p>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</p> <p>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</p> <p>Support for soft skills development: coaching, management training, upskilling/reskilling</p> <p>Support for networking and partnership building (at national and/or international level)</p> <p>Marketing activities: advertising, communication, events, fairs, and so on</p>
	Explanation	Financial sources for SRIPs are split by purpose for RTDI, human resources development, promotion of entrepreneurship and internationalisation.
HISTORY 	Period	Unlimited
	Ending year (for policies with limited period)	-
	Starting year	2016
	Explanation	The sources do not indicate any ending date. In view of the type of programme, it is more likely that it is unlimited/undetermined.
BUDGET 	Overall	<p>By the summer of 2018, EUR 817 million were approved:</p> <p>389 million EUR in the field of R&D</p> <p>113 million EUR in the field of human resource development</p> <p>296 million EUR in the promotion of entrepreneurship</p> <p>17 million EUR in the field of internationalization</p>



	Annual	Support for the operation of the clusters themselves (SRIPs) is 50% cofinanced in 3 key stages. Stage 1 up to 50% of eligible costs, but not more than EUR 90,000.00. Upon approval of the action plan, the beneficiaries from the 1st phase of the public tender will be invited to submit an application to the 2nd phase of the public tender. Under the second phase of the public tender, costs and expenses are co-financed up to 50%. If SRIPs pass a 2019 evaluation, they are eligible for the third phase of funding up to EUR 390,000, and the co-financing rate of eligible costs may not exceed 50%.
	Source of funding	The funding is divided between EU funds and national funds that are distributed by various ministries depending on the domain Co-financing is in accordance with the state aid rules (co-financing from 20 to 75% depending on the instrument). Support for the operation of the clusters is in the range of 50%.
POLICY EVALUATION 	Availability	in-itinere
	Results	The report on the implementation of the Smart Specialization Strategy (S4) for the first two years (2016-2018) has been published. The report provides membership statistics (total of 783 members), of which 81% are enterprises, of which 60% are micro and small enterprises, 18% medium-sized enterprises and 22% are large enterprises, with a balanced structure across both cohesion regions. Knowledge institutions represent 11% of SRIP membership, which means that practically all key public research organizations in the country (e.g. universities, etc) are included in the SRIPs. Members from the economy employ 83,000 people, which represents 17% of all employees, creating 23% of value added, which means that they exceed the average value added per employee by 34%. The data show a positive dynamics of membership growth, as it has increased by 24% since the establishment of SRIPs, and it should be noted that SRIPs have only just begun to operate in 2017 (preparation of a business model and preparation of action plans) and entered in the full implementation phase only in 2018. A mid-term monitoring and evaluation of the operation of SRIPs in the period 2017-2019 was completed in 2019.
POLICY ALIGNMENT WITH THE EU PRIORITIES 		Green Economy Digitalisation Social inclusion

03

State of play of cluster policy





3. State of play of cluster policy

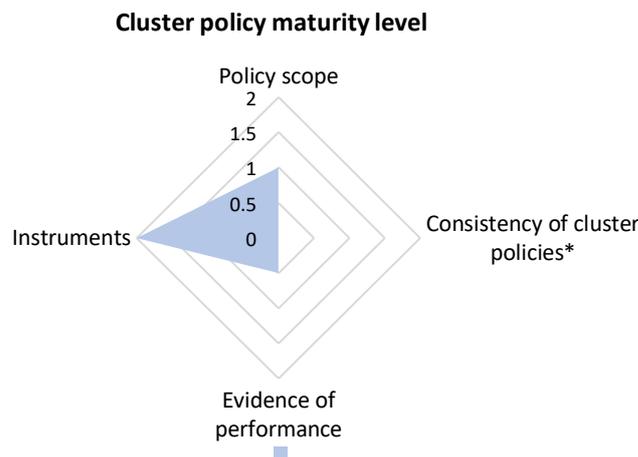
The data below illustrates how the country ranks in terms of maturity of cluster policy. The maturity index is based on a combination of factors presented in Chapter 1 and which are scored based on their existence:

- **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.

	Slovenia	Maximum score
Policy scope	1	2
Consistency of cluster policies*	0	2
Evidence of performance	0,5	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

The report on the implementation of the Smart Specialisation Strategy (S4) for the first two years (2016-2018) has been published, however the report provides the statistical results of the programme and does not include the



	evaluation of the programme (e.g. SRIPs) as such. An interim evaluation of the SRIPs was published in August 2019, going into details for each SRIP.
Policy approach in the country	Broad-based framework policies to support cooperation effectiveness
Continuity	Slovenia does not have a policy that directly targets cluster development. Cluster development is indirectly involved in the Strategic Research and Innovation Partnerships (SRIPs), which were formed in 2016 as part of the smart specialization strategy. SRIPs are long-term partnerships between companies, the research sphere, the state, and municipalities, as well as facilitators, users and the non-governmental sphere, which were formed at the end of 2016 in each of the nine areas of application of S4. SRIPs contain elements of modern clustering, such as the creation of a space for innovation, consisting of companies, development teams and universities specializing in a specific industry or field, and can therefore be understood as a kind of clusters, although they are not named as such. In its essence, SRIPs are large interest groups targeting the collaboration between a wide range of stakeholders of broad industry spectrum. Nevertheless, the strategy for the development of SRIPs is politically broad and general and addresses the development of the country in broad economic and research terms. Slovenia thus does not have a specific strategy for the development of clusters, as it does not have any political strategy or document that would address exclusively the formation and development of clusters, and only addresses elements of clusters indirectly.
Consistency	No cluster policy available Slovenia has no national cluster-specific policy and is thus not actively developing cluster policy. It does however use the SRIPs as clusters to implement smart specialisation, although their activities are broader and/ or have a different focus. The SRIPs themselves follow on from Centres of Excellence, which were supported in Slovenia as part of the previous 2009-2013 funding period.

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