



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Mexico

An initiative of the European Union





Content

Introduction	3
1. National cluster policy, programmes and initiatives	5
2. State of play of cluster policy	14
Bibliography.....	18
Annex.....	20



Introduction



This document presents an overview of the cluster policy in Mexico. 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 [OECD Economic Survey: Mexico 2022](#). The “Economic Surveys” present the major challenges faced by the country, evaluates the short-term outlook, and makes specific policy recommendations.

The COVID-19 pandemic has caused an unprecedented economic shock to the global economy and Mexico in particular. The economic recovery, especially of the labour market, is still ongoing with the globally integrated manufacturing sector leading the rebound.

With regard to the Russian war against Ukraine, Mexico takes a neutral position. Economically, it is hit less severe than other countries, as it can rely on its energy sovereignty and might even profit from new energy trade deals with European countries.

In the following, a succinct overview of the cluster policy in Mexico will be provided. The structure of this factsheet generally encompasses:

- 1) an insight into a broad cluster policy,
- 2) an assessment of the state of play of the national cluster policy.

01

National cluster policy, programmes and initiatives



EUROPEAN CLUSTER
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Strengthening the European economy through collaboration



1. National cluster policy, programmes and initiatives

In this section we provide an overview of the existing Mexican cluster policies on a regional level cluster policy.

The breakdown is presented in the form of a table, with the first column showcasing information on the aspects which constitute the policy (beginning with 'Policy Objectives', following with 'Policy Focus', etc.). The second column represents Mexico's new strategic industrial policy framework on the national level while the third column represents the case of an exemplary regional cluster policy in Mexico for the region of Nuevo León.

Within the table the text presented in bold (black) depicts standardised categories across country factsheets (56 in total for 2022) which are applied for comparative purposes. This is followed by a complementary descriptive text to provide more insights about the cluster policy in Mexico.

Policy type:	Broad policy	Regional cluster policy (example of Nuevo León ¹)
Policy name:	Course for an Industrial Policy	Business and Investment Development Strategy 2014-2020; Strategic Plan for the State of Nuevo León 2015-2030
POLICY OBJECTIVES 	Strengthening cooperation between companies or industry and RTDI actors Increasing competitiveness and boosting scale up of SMEs Supporting internationalisation activities Fostering R&D activities, technology development and implementation Fostering innovation and strengthening innovation ecosystems Supporting the creation of new cluster organisations	Strengthening cooperation between companies or industry and RTDI actors Increasing competitiveness and boosting scale up of SMEs Supporting internationalisation activities Fostering R&D activities, technology development and implementation Fostering innovation and strengthening innovation ecosystems Supporting the consolidation of existing cluster organisations

¹ Nuevo León is one of the most prosperous States in Mexico, accounting for the 23.4% of the total GDP in 2019, tops the attraction of FDI and has a strong tradition of clusters in various strategic sectors for Mexico (automotive, aerospace, medical devices, etc.) with dedicated organisations for their promotion. In fact, the National Council of Science and Technology (Consejo Nacional de Ciencia y Tecnología, Conacyt) has recognised it as the national leader in the industrial strategy based on clusters.



Policy type:	Broad policy	Regional cluster policy (example of Nuevo León ¹)
Policy name:	Course for an Industrial Policy	Business and Investment Development Strategy 2014-2020; Strategic Plan for the State of Nuevo León 2015-2030
	<p>Promoting entrepreneurship, start-ups and spin-offs</p> <p>Promoting resilience and sustainable economy and other solidarity-based initiatives</p> <p>Promoting employment and upgrading skills and competences</p> <p>Enhancing territorial cohesion (through RIS3)</p> <p>Increase supply chain resilience</p> <p>The objectives of the Course for an Industrial Policy are still tentative and remain to be further developed in detail in further policy documents. It delineates four sets of objectives under overarching themes:</p> <ol style="list-style-type: none"> 1. Innovation and scientific technology trends 2. Human capital formation for new trends 3. Promotion of regional content and linkages for MSMEs 4. Sustainable industry <p>Special emphasis lies on the promotion of new technologies in both research agendas and human capital formation, supporting entrepreneurship, domestic supply chains, integration of Mexican companies in global value chains, supply and distribution networks.</p> <p>Furthermore, under the fourth theme, a broad programme for a green transition of Mexican industries is sketched out,</p>	<p>Promoting entrepreneurship, start-ups and spin-offs</p> <p>Promoting employment and upgrading skills and competences</p> <p>Strengthening the network of cluster organisations/cross-clustering</p> <p>The Strategic Plan outlines the importance of clusters in the achievement of the vision for Nuevo León 2030. Clusters are understood as central instruments for economic development, particularly in terms of innovation and entrepreneurship, driving value chains integration and improving competitiveness.</p> <p>These goals are embedded in Nuevo León's Special Programme for Science, Technology and Innovation (Programa Especial Ciencia, Tecnología e Innovación) and the Sectoral Programme for Economy and Competitiveness (Programa Sectorial de Economía y Competitividad), which operationalise the overarching guidelines established in the Plan for Development 2016-2021 (Plan Estatal de Desarrollo 2016-2021). In chapter 7 on strategic business groups (clusters) of the Law for the Promotion of Investment and Employment for the State of Nuevo León, Article 49 explains the main objectives of the clusters. Among the objectives included in the article are:</p>



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	<p>including e-mobility, organic food, hydrogen, and circular economy.</p> <p>The creation of clusters is mentioned with regard to green industries and recycling in particular.</p>	<ul style="list-style-type: none"> - to serve as a platform for dialogue between the public and private sectors to design and implement strategies that favour the development of the industry; - to propose policies, strategies, actions and programs to promote the research, innovation and technological development in its industry or sector and - to promote the formation of specialized human capital for the strengthening of the industry among others.
<p>POLICY FOCUS</p> 	<p>cross-sectoral</p> <p>The Industrial Policy focuses on five strategic sectors selected for their relevance for the current and future economy, their annual growth rate and their importance for the labour market:</p> <ol style="list-style-type: none"> 1. Agri-food 2. Electronics 3. Electro-mobility 4. Medical and pharmaceutical services 5. Creative industries 	<p>No specific focus</p> <p>The policy does not target any specific industry, but it mentions Nuevo Leon's strategic sectors where there are clusters: automobile, aerospace, agri-food, electronic appliances, software, health, biotechnology, nanotechnology, interactive media and entertainment, house and urban sustainable development, transport and logistics, tourism, as well as the need to strengthen and consolidate clusters in emerging industries such as renewable energies.</p> <p>The Programme for Economy and Competitiveness divides clusters in three main groups:</p> <ol style="list-style-type: none"> 1. industrial sector, which represents the core of the State industry and includes consolidated clusters such as automobile;



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		<ol style="list-style-type: none"> 2. potential sectors, which represent growing industries with many opportunities for development such as aerospace; and, 3. transversal sectors, which comprise clusters that provide support to the others, such as nanotechnology.
<p>RESPONSIBLE AUTHORITIES</p> 	<p>Both drafting and implementation</p> <p>Provides funding</p> <p>Oversees the implementation</p>	<p>Both drafting and implementation</p> <p>Provides funding</p> <p>Oversees the implementation</p>
	<p>The Course for an Industrial Policy was developed by the Ministry of Economy as a top-level strategic framework to guide further policies and programmes aiming to bolster Mexico's industrial development. More detailed questions of funding and implementation will have to be decided in these future policies and programmes.</p>	<p>The state government of Nuevo León is the main authority steering the development of the Strategic and Development Plans, as well as the specific sectoral Programmes. It is also the main authority responsible for overseeing their implementation. However, other relevant institutions in the state are involved in the elaboration of such policies and programmes.</p> <p>The national government, through the Ministry of Economy, is the one who promotes the creation and strengthening of strategic business groups (CLUSTERS). The state government, through the Ministry of Economy, allocates a budget item to support the fulfilment of the objectives of the clusters, this amount has a counterpart from the private initiative of at least the same amount. The amount earmarked for 2022 was \$1,400,000 for each cluster.</p>



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Policy name:	Course for an Industrial Policy	Business and Investment Development Strategy 2014-2020; Strategic Plan for the State of Nuevo León 2015-2030
BENEFICIARIES 	SMEs Research organisations Academic institutions Start-ups Large firms General population Other: Nature	SMEs Cluster organisations Research organisations Academic institutions Start-ups Business associations Large firms NGOs Technology centres General population
	<p>The Industrial Policy emphasises its support for SMEs by dedicating one of its four thematic fields to it. Another field is dedicated to the promotion of research and an alliance with the academic sector is mentioned. Support for different forms of start-ups is planned and large firms are included in the “Made in Mexico” programme.</p> <p>Overall, the Course for an Industrial Policy aims to foster an inclusive and sustainable economy and therefore to benefit both the general population and nature.</p>	<p>The Strategic and Development Plans set the tone for the more operational programmes. Consequently, the action lines suggested for cluster policy include a comprehensive list of beneficiaries and the expected impacts in each of them.</p>
Financial	-	Funding collaboration initiatives



Policy type:	Broad policy	Regional cluster policy (example of Nuevo León ¹)	
Policy name:	Course for an Industrial Policy	Business and Investment Development Strategy 2014-2020; Strategic Plan for the State of Nuevo León 2015-2030	
INSTRUMENTS 		<p>(The available information on the Course for an Industrial Policy does not cover financial instruments yet)</p> <p>Support to R&D projects, SMEs becoming cluster members, etc.</p> <p>Innovation: voucher, support to hire PhDs, cooperation with R&I actors</p>	
	Technical assistance	<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>	<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	<p>The available information on the Course for an Industrial Policy does not cover any financial instruments yet.</p> <p>With regard to technical assistance, several aspects are mentioned. There shall be support for entrepreneurship, intellectual property, export advice as well as for skill development and reskilling. Networking and partnership building shall be supported at the regional, national, and international level. To enhance the visibility of Mexican</p>	<p>With regard to clusters, the aim of the policies is to promote the link between micro enterprises, SMEs and strategic clusters; transfer good practices to emerging clusters; strengthen the alliance between industry, academia and government (triple helix model), better link the supply and demand of human resources; promote talent by developing the technical, scientific and professional capacities in the state in coordination with the key clusters; and, promote</p>



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Policy name:		Course for an Industrial Policy	Business and Investment Development Strategy 2014-2020; Strategic Plan for the State of Nuevo León 2015-2030
		produce and incentivise domestic sourcing, the “Made in Mexico” label is to be relaunched.	clusters’ sustainability. The instruments listed are comprised in the Programmes as the means to achieve such objectives.
HISTORY 	Period	Unlimited period	Limited period
	Ending year <i>(for policies with limited period)</i>	-	2030
	Starting year	2022	2015
	Explanation	As a strategic framework, the Course for an Industrial Policy does not have a pre-determined ending year. It was presented in September 2022.	The Strategic Plan intends to provide a long-term, stable framework that allows continuity in the public policies. The Development Plan and the resulting Programmes are renewed every six years.
BUDGET 	Overall	No data available	No data available
	Annual	No data available	No data available
	Source of funding	The Course for an Industrial Policy does not specify funding sources and leaves these to future policies and programmes to determine.	Secretaría de Economía y Trabajo (Dirección de Clústeres) through the initiative "Clusteres Nuevo Leon", included in the Programme for Economy and Competitiveness. The initiative intends to better integrate academia, industry and government consolidating the Triple Helix model and thus, increasing the competitiveness of the strategic sectors of the State.



Policy type:		Broad policy	Regional cluster policy (example of Nuevo León ¹)
Policy name:		Course for an Industrial Policy	Business and Investment Development Strategy 2014-2020; Strategic Plan for the State of Nuevo León 2015-2030
POLICY EVALUATION 	Availability	ex-ante	in-itinere
	Results	<p>The Course for an Industrial Policy is based on a comparative evaluation of the industrial policies of leading economic powers and adjusted for the Mexican context.</p> <p>The available material does not provide information on any scheduled evaluations. In general, however, Mexico's economic policy programmes are monitored in annual reports.</p>	<p>The Secretary for Economy and Competitiveness outlines the absence of clear performance indicators to measure the impact of the clusters. Thus far, cluster activity has been monitored in accordance with the targets set by the Law for Promoting Investment and Employment in Nuevo León.</p> <p>However, the Secretary points that this is insufficient to measure hard data, making necessary to implement a solid methodology and to define the measurement instruments to assess the clusters' value and areas of improvement. Overall, the uneven growth of clusters and the lack of dissemination and visibility of their results are perceived as some of the main challenges.</p>
POLICY ALIGNMENT WITH THE EU PRIORITIES 		Green economy Digitalisation Resilience	Green economy

02

State of play of cluster policy



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COLLABORATION PLATFORM

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2. State of play of cluster policy

This section presents an overview on the **state of play of Mexican cluster policy** in the form of a quantitative and qualitative assessment. The data below illustrates how the country ranks in terms of maturity of cluster policy at the national level. The maturity assessment is based on a combination of factors presented in Chapter 1, which receive a score based on the existence or absence of a given element in the cluster policy. The regional policy example is not included in this assessment.

Note: the maturity assessment does not reflect the performance of a country, but only the degree of development of their national cluster policy at the moment of data collection (Q3 2022). The assessment illustrates how the country scores for each of the four criteria (policy scope, continuity of cluster policies, evidence of performance, cluster support instruments) compared to the maximum score that they can reach. Please refer to the Annex for the detailed overview of the categories and the scoring system.

The table below presents an overview of the **maturity assessment for Mexico** for 2022. The total score of Mexico is 1,5 points out of 8.

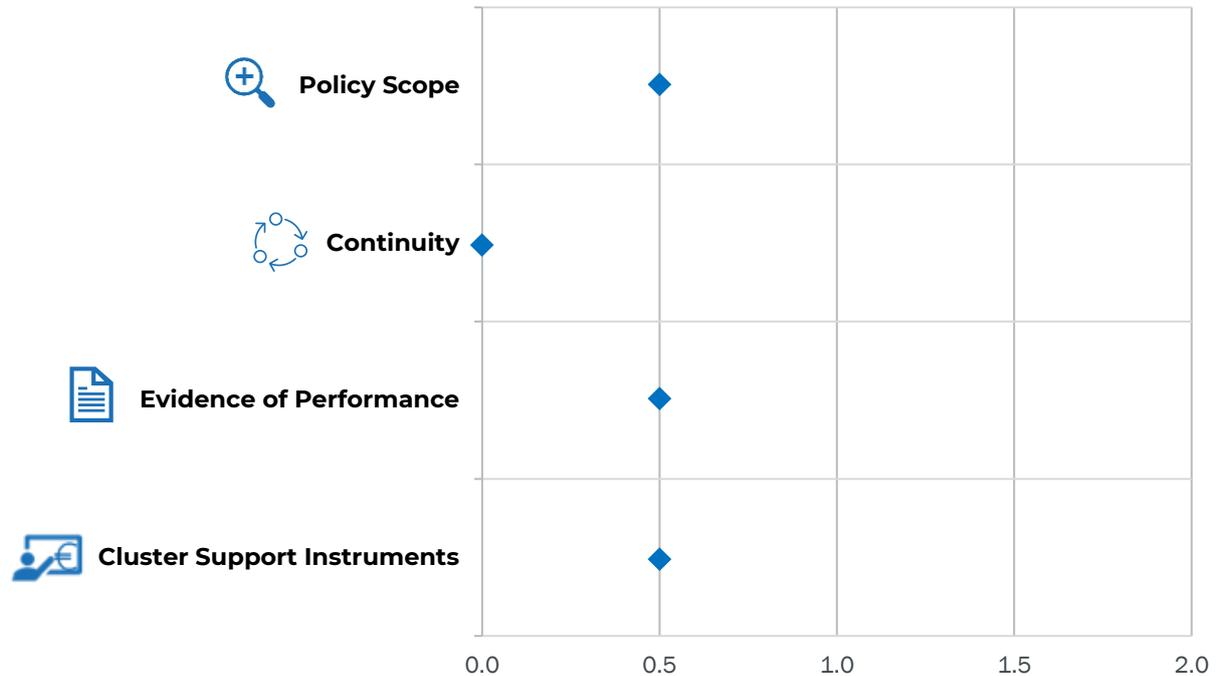
Mexico	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	0,5
	Sectoral policy	1	
	National and/or regional cluster policy	2	
CONTINUITY	No cluster-specific policy available	0	0
	Cluster policy established recently	0,5	
	Cluster policy established between over 2 and 10 years	1	
	Cluster policy established over 10 years ago	2	
EVIDENCE OF PERFORMANCE	No evaluation and / or monitoring available	0	
	Existence of evaluations of past policies	0,5	0,5
	Existence of monitoring or an ongoing / interim evaluation	1	
	Existence of monitoring and ex-ante or ongoing / interim evaluation	2	
CLUSTER SUPPORT INSTRUMENTS	No instruments for cluster development	0	
	Financial support for cluster development in the broader and / or sectoral policy	0,5	0,5
	Financial or technical support for cluster development in dedicated cluster policy	1	
	Financial and technical support for cluster development in dedicated cluster policy	2	
TOTAL (8)			1,5

Source: ECCP (2022)



Drawing from the table above that showcases the scored points in Mexico's cluster policy, the Figure below portrays the **degree of maturity** across four categories related to the national level cluster policy.

Figure 1: Maturity of cluster policy – Mexico



Source: ECCP (2022)

The text below provides a **qualitative description** of the state of play of the cluster policy in Mexico, which is complementary to the maturity assessment presented above.

Policy scope

In terms of policy scope and approach, Mexico does not have a national cluster policy. Clusters are mainly included within the industrial, competitiveness and STI policies and sometimes more pronounced at the regional (state) level. An example is the regional cluster policy in Nuevo León's "Strategic Plan for the State of Nuevo León 2015-2030", one of the Mexican regions with the highest cluster activity.

Continuity

The National Development Plan defines the national objectives, strategies and priorities for the integral development of the nation, structuring Mexico's policy and guiding the elaboration of specific sectoral programmes (industry, innovation, regional development, etc.), as well as the State Development Plans and their corresponding programmes.

Even though Mexico does not have a specific policy, clusters were often mentioned in relation to the broader industrial, competitiveness and STI policies. Some initiatives such as the mapping of the



Mexican clusters in 2016 or the creation of funding programmes directed towards clusters were launched by the federal government support.

A notable policy enacted from around 2014-2019 were the State Innovation Agendas. The State Innovation Agendas' objectives were organised around the notion of smart specialisation and the quadruple helix aiming for durable mechanisms of collaboration between business, academia, civil society, and the state.

However, the latest National Development Plan 2019-2024 does not include any reference to clusters. There has apparently been a significant shift in policy preferences in the government being more critical of the business-oriented State Innovation Agendas and emphasising a focus on more fundamental research (called "frontier research"). Accordingly, federal funding for the regional innovation strategies has been cut after 2019 and the so-called Mixed Funds (Fondos Mixtos), matching federal and state budgets, have been found ineffective for the national governments' goals and are no longer available.²

The new Course for an Industrial Policy sets out a policy framework which is more focused on the national level. It mentions clusters in the context of green industries. Regarding its regional dimension, it promotes a less granular level, determining potential for smart specialisation not at the state level but on the level of larger regional groupings.

As a side note, on a regional level in Nuevo León, the cluster policy dates back to 2004 and it has continued uninterrupted since then. Clusters are still central in the economic and innovation plans of the State. Mexican States are expected to produce a new State Development Plan by 2021.

Evidence of performance

The Course for an Industrial Policy is based on a comparative analysis of the industrial policies of leading economic powers and adjusted for the Mexican context. Although the available material lists specific actions, it does not provide testable performance goals or information on scheduled evaluations. In general, however, Mexico's economic policy programmes are monitored in annual reports.

Cluster support instruments

The available information on the Course for an Industrial Policy does not cover any specific financial instruments yet. However, it indicates general financial support for, among others, green industrial clusters.

With regard to technical assistance, several aspects are mentioned. There shall be support for entrepreneurship, intellectual property, export advice as well as for skill development and reskilling. Networking and partnership building shall be supported at the regional, national, and international level. To enhance the visibility of Mexican produce and incentivise domestic sourcing, the "Made in Mexico" label is to be relaunched.

² See CONACYT 2019, and Solleiro-Rebolledo et al. 2021, p. 130.

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EUROPEAN CLUSTER
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



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Annex

Criterion of maturity assessment	Description	Scoring (points between 0 and 2)
Policy scope	assessment whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies, e.g. foreign trade policies, labour and social policies or specific sectoral policies, e.g. industrial policy tourism policies, agriculture policies	absence of cluster policy = 0 existence of broader policies = 0,5 existence of specific sectoral policies = 1 existence of targeted cluster policies = 2
Continuity of cluster policies	assessment of the duration and experience of the country in carrying out cluster policies. This criterion assesses only existence of targeted cluster policies and not broader policies or sectoral policies	absence of policies supporting cluster development = 0 cluster policy established recently (within the last 2 years) = 0,5 cluster policy established between over 2 and 10 years = 1 cluster policy established over 10 years ago = 2
Evidence of performance	assessment whether there are evaluations of past and ongoing policies and a monitoring system in place. The existence of monitoring and evaluation mechanisms determines the degree of policy development in the country	no evaluation and / or monitoring available = 0 existence of evaluations of past policies, e.g. ex-ante = 0,5 existence of monitoring or an ongoing / interim evaluation =1 existence of monitoring and ex-ante or ongoing / interim evaluation =2
Cluster Support Instruments	assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support	no instruments for cluster development =0 financial support for cluster development in the broader and / or sectoral policy = 0,5 financial or technical support for cluster development in dedicated cluster policy = 1 financial and technical support for cluster development in dedicated cluster policy = 2

Source: ECCP (2022)