



EUROPEAN CLUSTER  
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# Country factsheet

Ukraine

An initiative of the European Union





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## Introduction



This document presents an overview of the cluster policy in Ukraine. First, however, it is important to provide some context on the overall situation of the country's economy. While most European countries are hit by the economic disruptions of the Russian military aggression and the subsequent sanctions and countersanctions, for no country the war is as devastating as for the Ukraine – not only in lives lost and physical destruction but also in economic terms.

According to preliminary data, [Ukraine's GDP contracted](#) by 30.4 per cent in 2022. Even before, the Ukrainian economy had suffered from the simmering military conflict in the Donbas region ever since 2014, that scared off foreign investment into the modernisation and internationalisation of its industries.

Now that Russia has inflicted a full-scale war on Ukraine, the nature of the game has changed and Ukraine is operating under the framework conditions of a war economy. If anything, this change of circumstances has only emphasized the importance of cluster policy for economic development and the resilience of industrial ecosystems.

In March 2022, right after the beginning of the Russian invasion, the [Ukrainian Cluster Alliance](#) (UCA) was formed and is by now listing more than 50 cluster organisations, business associations and similar actors as its members. Currently, its main tasks are to support the relocation of clusters from the war zones, the replacement of supply chains and export channels that were cut off and securing the basic needs of the population as well as the military supplies for the war.<sup>1</sup>

A deeper analysis of trade and value chain disruptions caused by the war, the Ukrainian cluster landscape, the state and prospects of Ukrainian-European value chain integration, and the role of clusters in rebuilding regional supply chains, can be consulted in the [input paper](#) prepared for the Clusters meet Regions [event](#) in Košice on 30 March 2023.<sup>2</sup>

Against this background, this document will present not only present the cluster policy as formulated in the National Strategy for Regional Development 2021-2027, the National Innovation Strategy 2030 and the National Economic Strategy 2030 from before the outbreak of the war, but also the Draft National Cluster Development Programme until 2027 formulated by a group of cluster representatives under the auspices of the UCA and currently in consultation with the Ministry of Economy. Furthermore, one example of a regional development policy is presented, the Cherkasy Region Development Strategy 2021-2027.

The following factsheet will provide a succinct overview of the present Ukrainian cluster policy. The structure of the document encompasses:

- 1) an overview of the national economic development policies, the draft programme for cluster development and an insight into a regional development policy.
- 2) an assessment of the state of play of the national cluster policy.

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<sup>1</sup> See also the entries in the [Policy Toolkit](#) on the ECCP website for further details.

<sup>2</sup> Prognos (2023). European clusters integrating Ukrainian clusters and companies into the EU value chains. Input paper prepared for the Clusters meet Regions event in Košice. [https://clustercollaboration.eu/sites/default/files/event\\_calendar/ECCP\\_CmR\\_Kosice\\_Input\\_Paper.pdf](https://clustercollaboration.eu/sites/default/files/event_calendar/ECCP_CmR_Kosice_Input_Paper.pdf) (accessed 30.03.2023).

01

# National cluster policy, programmes and initiatives



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## 1. National cluster policy, programmes and initiatives

In this section we provide an overview of the existing Ukrainian economic development policies on a national, a draft programme for cluster development as well as an example of a regional development 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 presents the case of the national Ukrainian economic development policies covering cluster development, whilst the third presents a draft programme specifically focused on cluster development. The fourth column presents an exemplary regional development policy including cluster support in Ukraine.

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 Ukraine.

Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
<b>POLICY OBJECTIVES</b> 	<b>Strengthening cooperation between companies or industry and RTDI actors</b> <b>Increasing competitiveness and boosting scale up of SMEs</b> <b>Supporting internationalisation activities</b> <b>Fostering R&amp;D activities, technology development and implementation</b>	<b>Strengthening cooperation between companies or industry and RTDI actors</b> <b>Supporting internationalisation activities</b> <b>Enhancing the visibility of clusters</b> <b>Fostering innovation and strengthening innovation ecosystems</b>	<b>Strengthening cooperation between companies or industry and RTDI actors</b> <b>Increasing competitiveness and boosting scale up of SMEs</b> <b>Supporting internationalisation activities</b> <b>Enhancing the visibility of clusters</b> <b>Fostering R&amp;D activities, technology development and implementation</b>



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
	<p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Supporting cluster excellence and professionalisation of cluster management</b></p> <p><b>Supporting the consolidation of existing cluster organisations</b></p> <p><b>Supporting the creation of new cluster organisations</b></p> <p><b>Promoting entrepreneurship, start-ups and spin-offs</b></p> <p><b>Promoting resilience and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Enhancing territorial cohesion (through RIS3)</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p> <p><b>Cluster analysis and support for policymaking</b></p>	<p><b>Supporting cluster excellence and professionalisation of cluster management</b></p> <p><b>Supporting the consolidation of existing cluster organisations</b></p> <p><b>Supporting the creation of new cluster organisations</b></p> <p><b>Promoting resilience and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Enhancing territorial cohesion (through RIS3)</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p> <p><b>Cluster analysis and support for policymaking</b></p> <p><b>Increase supply chain resilience</b></p>	<p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Supporting the consolidation of existing cluster organisations</b></p> <p><b>Supporting the creation of new cluster organisations</b></p> <p><b>Promoting entrepreneurship, start-ups and spin-offs</b></p> <p><b>Promoting resilience and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Enhancing territorial cohesion (through RIS3)</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p>



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
	<p>The National Economic Strategy 2030 (NES), the National Innovation Strategy 2030 (NIS), and the National Strategy for Regional Development 2021-2027 (NSRD) together form the policy framework on the national level relevant for cluster development policy. Although they do not represent dedicated and detailed national cluster policies, they affirm the policy support for clusters development in Ukraine and provide some general guidelines. In that, they are complementary.</p> <p>One of the main goals mentioned in the NSRP is “ensuring comprehensive assistance to the reindustrialisation of agglomerations and large cities on the basis of innovations (techniques and technologies) of higher technological structures, the formation of urban and regional economic clusters”.</p> <p>Furthermore, it aims for the creation of cross-border clusters, the development of regional Smart Specialisation Strategies and the strengthening of existing cluster</p>	<p>The Draft National Cluster Development Programme 2027 (DNCDP) represents the most advanced document available on the path to a dedicated Ukrainian cluster development policy. It has been drafted by cluster managers and experts under the auspices of the Ukrainian Cluster Alliance (UCA) and is currently in consultation with government bodies.</p> <p>Its primary goal is the professionalisation of cluster management at and across all levels of governance from the national to the regional and local level.</p> <p>More specifically, the DNCDP aims for the institutionalisation of cluster development at the national level, the introduction of a monitoring and evaluation system, a cluster coordination centre, internationalisation and integration into European networks, the diversification of clusters into different economic priority sectors.</p>	<p>The Lviv Region Development Strategy 2021-2027 (LRDS) is a comprehensive regional development strategy comprising not only economic development but also education, health and ecology. It was developed in line with the National Strategy for Regional Development 2021-2027 and European regional development policy frameworks like Smart Specialisation. It envisions a broad range of support measures for business development and innovation, mentioning clusters as a vehicle to deliver support. In particular, the LRDS emphasises the benefits of a cluster approach to develop its heterogenous subregions as it allows to take into account the peculiarities of each territory.</p> <p>The Action Plan 2021-23 (AP) lists several cluster-related projects:</p> <ol style="list-style-type: none"> <li>1. “Creation and development of the bioeconomy cluster” (Programme 1, Task 4)</li> <li>2. “Creation of a network of tourist clusters” (Programme 5, Task 9)</li> </ol>



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
	organisations as well as research on best practices in cluster management.		<ol style="list-style-type: none"> <li>3. The development of business infrastructure in industrial parks (Technical Task 1.2.1)</li> <li>4. "Development of renewable energy and creation of energy clusters" (under Technical Task 3.3.1.2)</li> <li>5. Support to fashion incubator to participate in European cluster networks</li> </ol>
<b>POLICY FOCUS</b>  	<b>No specific focus</b>	<b>No specific focus</b>	<b>No specific focus</b>
	The NES, NIS and the NSRD are comprehensive economic development strategies and provide a framework for all sectors. However, they mention some sectoral focus areas like high- and medium-tech manufacturing, ICT, tourism, agriculture, and defence industries.	The DNCDP does not target any specific sectors but rather aims for a revision of the general framework for cluster development and greater sectoral diversity among cluster organisations. However, it promotes cluster initiatives in high-tech manufacturing as the sector lacks behind other ones with already high numbers of cluster organisations like ICT and agriculture.	The LRDS is comprehensive and cross-sectional. It mentions critical sectors for the Lviv region like IT & programming; creative & media industries; machine and instrument building; textile, pharmaceuticals; bioeconomy (wood and furniture industry; printing; organic agriculture and food industry; bioenergy; biotechnology).  Lviv's priority sectors as defined by their Smart Specialisation Strategy are Agri-food, mechanical engineering, Bioenergy,



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Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
			Health, creative industry, wood-furniture-construction, and light/textile industry.
<b>RESPONSIBLE</b>  <b>AUTHORITIES</b>	<b>In charge of drafting</b> <b>In charge of implementation</b> <b>Provides funding</b> <b>Oversees the implementation</b>	<b>In charge of drafting</b>	<b>In charge of drafting</b> <b>In charge of implementation</b> <b>Provides funding</b> <b>Oversees the implementation</b>
	<p>The NES, NIS and NSRD are top-level policies devised under the aegis of the Ministry of Economy, the Ministry of Education and Science, and the Ministry for Communities and Territories Development respectively. They are also responsible for implementation and supported by other national and regional actors. Funding is provided from the government budget, for example through the state regional fund or the Ukrainian Start-up Fund.</p>	<p>The UCA coordinated the drafting process. Further responsibilities for implementation and funding are not mentioned and need to be decided in the further political decision process.</p>	<p>The LRDS was drafted by the Lviv Regional State Administration which also provides part of the funding and is responsible for the implementation.</p>
	<b>SMEs</b> <b>Cluster organisations</b> <b>Research organisations</b>	<b>SMEs</b> <b>Cluster organisations</b> <b>Research organisations</b>	<b>SMEs</b> <b>Cluster organisations</b> <b>Research organisations</b>



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
<b>BENEFICIARIES</b> 	<b>Academic institutions</b> <b>Start-ups</b> <b>Business associations</b> <b>Large firms</b> <b>Technology centres</b> <b>General population</b> <b>Policy makers</b>	<b>Academic institutions</b> <b>Business associations</b> <b>Large firms</b> <b>Technology centres</b> <b>Policy makers</b>	<b>Academic institutions</b> <b>Start-ups</b> <b>Business associations</b> <b>NGOs</b> <b>Technology centres</b> <b>General population</b>
	<p>NES, NIS and NSRD are comprehensive strategies aiming at a broad range of crucial actors. They offer support small and large businesses, research organisations and academic institutions. There is dedicated funding for start-ups as well as for business organisations. Cluster organisations are seen as an important development instrument as are technology centres. Policy makers benefit from improved governance capacities and the general population from skill development programmes.</p>	<p>The DNCDP certainly focuses on Cluster organisations as its main direct beneficiaries. The professionalised cluster management that it envisions then also includes SMEs and large firms, research organisations and universities as well as technology centres. Finally, it also provides policy makers with the capacities to enact more ambitious economic development policies.</p>	<p>The LRDS supports SMEs and large firms in their collaboration within cluster formations and business associations, and with the research community. It also provides specific support for start-ups. The general population and academic institutions benefit from measures to expand education, especially higher education. NGOs are incorporated into implementation processes. The Strategy also foresees the creation and improvement of technology centres in line with its broader goals to upgrade the business infrastructure.</p>



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Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
<b>INSTRUMENTS</b> 	<b>Financial</b> <b>Funding collaboration initiatives</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b> <b>Application to labelling schemes and similar initiatives</b> <b>Subsidies to hire personnel</b> <b>Financing start-ups</b> <b>Innovation: voucher, support to hire PhDs, cooperation with R&amp;I actors</b>	<b>Funding collaboration initiatives</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b>	<b>Funding collaboration initiatives</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b> <b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b> <b>Financing networking events</b> <b>Financing start-ups</b>
	<b>Technical assistance</b> <b>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</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>Support for networking and partnership building (at national and/or international level)</b>	<b>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</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>Support for networking and partnership building (at national and/or international level)</b>	<b>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</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>Support for networking and partnership building (at national and/or international level)</b>



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
	<b>Marketing activities: advertising, communication, events, fairs, and so on</b>	<b>Marketing activities: advertising, communication, events, fairs, and so on</b>	<b>Marketing activities: advertising, communication, events, fairs, and so on</b>  <b>Other: Support for the creation of an institutional platform to facilitate the dialogue between banks, institutional investors and businesses to expand the access to credit for SMEs</b>
	<b>Explanation</b> The NES, NIS and NSRD include a range of financial support mechanisms, often channelled through dedicated funds like the state regional fund, the innovation fund or the start-up fund.  In terms of technical assistance, they encompass a rich variety of support measures from incubator and accelerator spaces and technology centres to skills development programmes for entrepreneurship, coaching programmes as well as assistance for internationalisation.	The DNCDP does not provide much about financial instruments besides support for collaboration and forming clusters. More will have to be decided in the political decision process.  In terms of technical assistance, it envisions a comprehensive support infrastructure for cluster development.	The LRDS provides funding for collaboration initiatives, in particular between SMEs and research institutions, including networking events. It also provides funding for start-ups.  It offers a broad range of technical assistance like entrepreneurship support programmes, internationalisation support including for participation in international exhibitions, business and start-up incubators, a tech start-up school, laboratories, an Innovation Commercialisation Centre, as well as forums, conferences and exchange programmes.  There is also support for the creation of an institutional platform to facilitate the dialogue between banks, institutional



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)	
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027	
			investors and businesses to expand the access to credit for SMEs.	
<b>HISTORY</b> 	<b>Period</b>	<b>Limited period</b>	<b>Limited period</b>	
	<b>Ending year</b> <i>(for policies with limited period)</i>	NES: 2030 NIS: 2030 NSRD: 2027	2027	2027
	<b>Starting year</b>	NIS: 2019 NES & NSRD: 2021	2022	2021
	<b>Explanation</b>	The NSRD is aligned with the 2021-2027 period of the EU budget. The NIS was published in 2019 and covers the period up to 2030. The NES was developed after an evaluation of the state of the Ukrainian economy and economic policy and serves as a more general long-term vision until 2030.	The DNCDP is projected until 2027, in line with the NSRD. The drafting took place in 2022. A final starting year will have to be decided.	The LRDS was developed in line with the National Strategy for Regional Development 2021-2027 which, in turn, is aligned with the EU budget period.  It is implemented in two phases from 2021-2023 and 2024-2027 accompanied by Action Plans.
	<b>Overall</b>	Not available.	Not available.	Budget numbers are available for the Action Plan 2021-2023.



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)	
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027	
<b>BUDGET</b> 			Budget for Programme 1 “Competitive economy based on smart specialisation”: UAH 20.5 billion (EUR 529 million <sup>3</sup> )  Of which there are dedicated to Task No. 4 “Creation and development of the bioeconomy cluster”: UAH 5.4 million (EUR 139,000)  Additionally, Programme 5, Task No. 9 “Creation of a network of tourist clusters”: UAH 18 million (EUR 464,000)  And the development of business infrastructure in industrial parks in Technical Task 1.2.1: UAH 5,1 billion (EUR 131 million)	
	<b>Annual</b>	Not available.	Not available.	See Action Plan for detailed numbers.
	<b>Source of funding</b>	Government budget, state regional fund, EU and international assistance, local funds, private investment funds, and others.	State regional fund, EU assistance, and others.	Funding comes from the state budget of Ukraine, in particular the State Fund for Regional Development, sectoral/cross-sectoral state target programmes and

<sup>3</sup> According to the InforEuro conversion rate for 03/2023. See European Commission. Exchange rate (InforEuro). [https://ec.europa.eu/info/funding-tenders/procedures-guidelines-tenders/information-contractors-and-beneficiaries/exchange-rate-inforeuro\\_en](https://ec.europa.eu/info/funding-tenders/procedures-guidelines-tenders/information-contractors-and-beneficiaries/exchange-rate-inforeuro_en) (accessed 07.10.2022).



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
			budget programmes of central executive bodies aimed at the development of certain areas in the regions, subventions, other transfers from the state budget to local budgets, local budgets, international assistance (in particular EU technical assistance), and private investment.
<b>POLICY</b>  <b>EVALUATION</b>  	<b>Availability</b>	<b>ex-post</b>	<b>in-itinere</b>
	<b>Results</b>	<p>The NSRD foresees an ex-post evaluation one and a half years after its expiration.</p> <p>The NIS provides a range of key performance indicators to be evaluated against the base year of 2017. A monitoring system on the basis of three-year action plans is provided.</p> <p>The NES is based on a comprehensive analysis and evaluation of previous policies. It defines a set of target indicators for 2030.</p>	<p>The Draft envisions a comprehensive monitoring and evaluation system aligned with European and international standards.</p> <p>The LRDS envisages annual monitoring reports to the regional council.</p> <p>Further evaluation is to be carried out in accordance with the procedure determined by the Cabinet of Ministers of Ukraine.</p>



Policy type:	Broad policy	National Cluster Policy (draft)	Broad policy (regional example)
Policy name:	National Economic Strategy 2030 National Innovation Strategy 2030 National Strategy for Regional Development 2021-2027	Draft National Cluster Development Programme 2027	Lviv Regional Development Strategy 2021-2027
<b>POLICY ALIGNMENT WITH THE EU PRIORITIES</b> 	<b>Green economy</b> <b>Digitalisation</b> <b>Resilience</b>	<b>Resilience</b>	<b>Green economy</b> <b>Digitalisation</b> <b>Resilience</b>

02

## State of play of cluster policy



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## 2. State of play of cluster policy

This section presents an overview on the state of play of Ukrainian 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 cluster 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 Ukraine for 2022. The total score of Ukraine is 1 point out of 8.

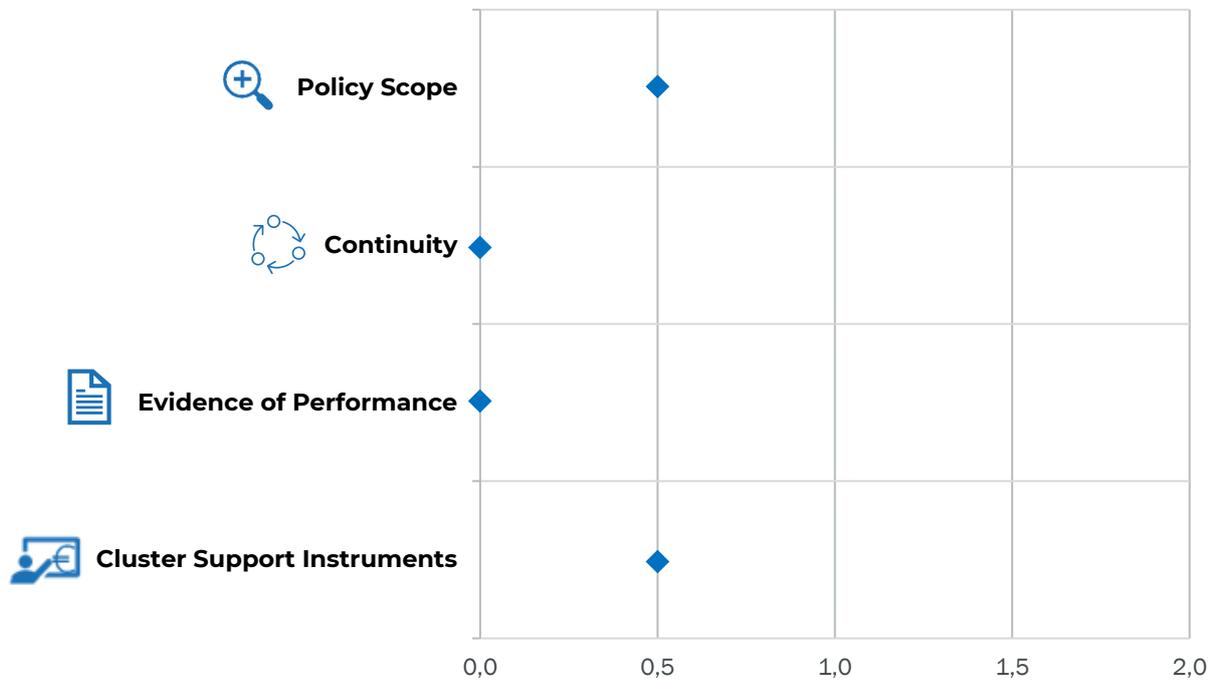
Ukraine	MATURITY ASSESSMENT	Max score	Actual score
<b>POLICY SCOPE</b>	Absence of cluster policy	0	
	Broad policy	0,5	<b>0,5</b>
	Sectoral policy	1	
	National and/or regional cluster policy	2	
<b>CONTINUITY</b>	No cluster-specific policy available	0	<b>0</b>
	Cluster policy established recently	0,5	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

Source: ECCP (2022)



Drawing from the table above that showcases the scored points in Ukraine’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 - Ukraine**



Source: ECCP (2022)

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

**Policy scope**

Ukraine does not have an active, dedicated cluster policy. However, cluster development plays a role in its national-level National Economic Strategy 2030 (NES) and National Regional Development Strategy 2021-2027 (NRDS) and on regional level policies, all of which include several measures to support clusters as a means for economic development in general. An expert group under the aegis of the Ukrainian Cluster Alliance has prepared a Draft National Cluster Development Programme 2027 (DNCDP) which is currently under consultation with the government. The score therefore represents the status quo under the NES and the NRDS.

**Continuity**

The cluster framework was developed into a policy concept already in 2008 and appeared in subsequent broader economic development policies. Yet, it was never transformed into a dedicated cluster development policy and performance by and large remained sluggish until recently. The lack of an official policy to support cluster development then provoked initiatives from below like the ClusterRISE project and efforts to organise Ukrainian clusters into a common network which brought



about the Ukrainian Cluster Alliance in March 2022. The UCA is currently driving the development of Ukrainian cluster policies, as exemplified by its DNCDP initiative.<sup>4</sup>

### **Evidence of performance**

There are no evaluations of official cluster development policies, even though the NES drafting process involved a general evaluation of the economic policies of Ukraine.

The DNCDP is partially based on the experience from the ClusteRISE project. It aimed to develop two ‘Engineering-Automation-Mechanical’ clusters in the regions of Zaporizhzhia and Kharkiv. Its evaluation showed that although it did not reach all its objectives, it was considered useful by participants throughout.<sup>5</sup>

### **Cluster support instruments**

The broader economic development policies of Ukraine provide for both financial and technical support instruments for cluster development. However, they are very limited and not bundled in a dedicated cluster development policy framework.

### **Cross-regional / international cooperation**

Since its inception in March 2023, the UCA has established numerous new ties with European partners with the goal to “promote integrated value chains and ecosystems between Ukraine and the European Union”.<sup>6</sup> Important initiatives include:

- Creation of a regional collaboration programme for cluster support between the UCA and cluster associations from Czechia, Lithuania, Poland, Romania, and Slovakia.
- Creation of Digital Innovation Hubs (DIH) integrated into a support network of Eastern European DIHs, an Eastern European network of Industry 4.0 experts, and the creation of industry roadmaps for digital transformation.
- The Professionals4Ukraine network (previously Ambassadors4Ukraine) enables Ukrainian and foreign professionals outside Ukraine to engage in promoting and supporting Ukrainian industrial ecosystems in networking events, trade fairs, conferences, and other forums.

Furthermore, the UCA has set up a platform for international project partnerships to match Ukrainian innovation projects with European companies.<sup>7</sup>

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<sup>4</sup> For more information on the UCA’s activities, see Prognos (2023). European clusters integrating Ukrainian clusters and companies into the EU value chains. Input paper prepared for the Clusters meet Regions event in Košice. [https://clustercollaboration.eu/sites/default/files/event\\_calendar/ECCP\\_CmR\\_Kosice\\_Input\\_Paper.pdf](https://clustercollaboration.eu/sites/default/files/event_calendar/ECCP_CmR_Kosice_Input_Paper.pdf) (accessed 30.03.2023).

<sup>5</sup> APPAU (2021). Cluster Development “Engineering – Automation – Machinery” in the regions of Kharkiv and Zaporizhzhia. Final report of the ClusteRISE project. <https://appau.org.ua/en/clusterise-en/final-report-clusterise-project/> (accessed 10.10.2022).

<sup>6</sup> A summary of current initiatives can be found in Ukrainian Cluster Alliance (2023). Building Strong Industrial Ecosystems in Ukraine Integrated into European Union – Top-10 Proposal of Ukrainian Cluster Alliance for Internationalisation of the National Clusters and SMEs Series. <https://www.clusters.org.ua/en/projects/building-strong-industrial-ecosystems-integrated-into-eu/> (accessed 30.03.2023).

<sup>7</sup> See <https://www.clusters.org.ua/en/future-projects/> (accessed 30.03.2023).

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## Annex

Criterion of maturity assessment	Description	Scoring (points between 0 and 2)
<b>Policy scope</b>	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	<b>absence of cluster policy = 0</b> <b>existence of broader policies = 0,5</b> <b>existence of specific sectoral policies = 1</b> <b>existence of targeted cluster policies = 2</b>
<b>Continuity of cluster policies</b>	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	<b>absence of dedicated policies supporting cluster development = 0</b> <b>cluster policy established recently (within the last 2 years) = 0,5</b> <b>cluster policy established between over 2 and 10 years = 1</b> <b>cluster policy established over 10 years ago = 2</b>
<b>Evidence of performance</b>	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	<b>no evaluation and / or monitoring available = 0</b> <b>existence of evaluations of past policies, e.g. ex-ante = 0,5</b> <b>existence of monitoring or an ongoing / interim evaluation =1</b> <b>existence of monitoring and ex-ante or ongoing / interim evaluation =2</b>
<b>Cluster Support Instruments</b>	assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support	<b>no instruments for cluster development =0</b> <b>financial support for cluster development in the broader and / or sectoral policy = 0,5</b> <b>financial or technical support for cluster development in dedicated cluster policy = 1</b> <b>financial and technical support for cluster development in dedicated cluster policy = 2</b>

Source: ECCP (2022)