



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Sweden

An initiative of the European Union





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Introduction



This document presents an overview of the cluster policy in Sweden. Given the 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 Sweden 2022](#).

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.

The COVID-19 pandemic has caused an unprecedented economic shock to the European and global economy. In response, policymakers at EU and national level have acted decisively and at short notice to make available very significant financial resources, notably through the Recovery and Resilience Facility, to tackle the threat of a prolonged downturn. [National recovery and resilience plans](#) have been drafted in each Member State to ensure a recovery that addresses the challenges identified in the European Semester. In Sweden, research and innovation are crucial to Sweden’s competitiveness and to rebooting the economy after the COVID-19 pandemic. Clusters are not directly mentioned in the National recovery and resilience plan¹. The Swedish Government increased the funding for the autumn budget 2020 of EUR 65.34 million to Vinnova², Research Institutes of Sweden (RISE)³ and Business Sweden⁴ to support measures that help reboot Sweden⁵. In addition to the COVID-19 pandemic, the ongoing Russian military aggression against Ukraine has also taken its toll on EU companies and industrial ecosystems, highlighting the significance of policy efforts in supporting SMEs and clusters.

The [ERDF Partnership Agreement 2021-2027](#) in Sweden makes a reference to clusters. The priorities of the funds are based on the previous efforts of Sweden concerning research and innovation. As a part of that, clusters are mentioned as contributing to cooperation and knowledge transfer between research and businesses, active participation of universities, increase of growth and competitiveness of SMEs, and focussing investments on green and digital topics.

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

- 1) an overview of the industrial ecosystems and cluster landscape in Sweden
- 2) an overview of the national cluster policy and an insight into the regional cluster policy,

¹ More information on the Swedish recovery and resilience plan can be found here:

https://ec.europa.eu/info/business-economy-euro/recovery-coronavirus/recovery-and-resilience-facility/recovery-and-resilience-plan-sweden_en#swedens-recovery-and-resilience-plan

² Vinnova is Sweden’s innovation agency.

³ RISE is Sweden’s research institute and innovation partner. Through collaboration with industry, academia and the public sector, RISE ensures business competitiveness and contribute to a sustainable society. <https://www.ri.se/en/about-rise/about-rise>

⁴ Business Sweden is jointly owned by the Swedish state and the Swedish business sector with a mandate and a mission to help international companies gain access to the Swedish market and help domestic ones utilize it as a platform for expansion.

⁵ <https://www.government.se/press-releases/2020/09/competitiveness-and-reboot-for-research-innovation-and-investments/>



- 3) an assessment of the state of play of the national cluster policy.

01

Industrial ecosystems and cluster landscape



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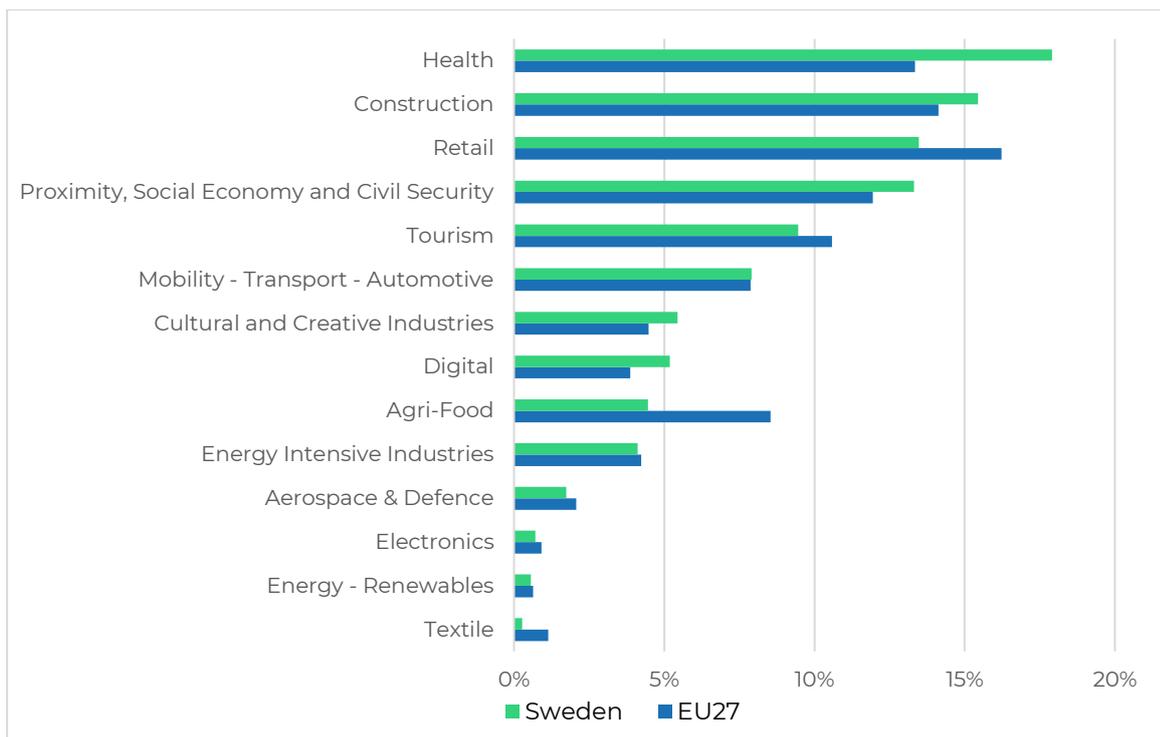
1. Industrial ecosystems and cluster landscape

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.⁶ The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2 -digit activities, following the methodology established in European Commission.⁷

In the following figure, the employment share of Sweden and the EU27 in each industrial ecosystem is shown relative to the number of all employed persons in the 14 industrial ecosystems. 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. For Sweden, the three main ecosystems by employment for are “Health”, “Construction” and “Retail”. For the first two as well as for “Proximity, Social Economy and Civil Security”, “Cultural and Creative Industries” and “Digital” Sweden exhibits employment shares above the EU average.

Figure 1: Employment in the ecosystems



Source: ECCP (2022), own elaboration based on data from Eurostat

⁶ see here for more information <https://clustercollaboration.eu/in-focus/industrial-ecosystems> (last access 09.01.2023)

⁷ see European Commission (2021): Annual Single Market Report, SWD(2021)351.



Regionally relevant nodes (agglomerations)

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.⁸ The following tables shows the total number of regionally relevant specialisation nodes (agglomerations) 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 67 in the country, while the second table is based on the 14 ecosystems, which total 5 in the country.

Table 1: Number of regionally relevant sectoral nodes and Top 5 nodes by region (NACE)

Region	Number of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
SE11: Stockholm	11	J58 – Publishing activities	J62 - Computer programming, consultancy & related activities	K65 - Insurance, reinsurance and pension funding	M73 - Advertising and market research	M70 - Activities of head offices
SE12: East-Central Sweden	8	C24 - Manuf. of basic metals	Q87 – Residential care activities	Q88 - Social work activities without accommodation	P85 - Education	L68 - Real estate activities
SE21: Småland and islands	9	C16 - Manuf. of wood products	A02 - Forestry & logging	C31 - Manufacture of furniture	C28 - Manuf. of machinery & equipment	Q87 – Residential care activities
SE22: South Sweden	5	Q87 – Residential care activities	Q88 - Social work activities without accommodation	L68 - Real estate activities	P85 - Education	R93 - Sports activities & amusement & recreation activities
SE23: West Sweden	7	C29 - Manuf. of motor vehicles & trailers	M71 - Architecture, engineering	Q87 – Residential care activities	Q88 - Social work activities without accommodation	P85 - Education
SE31: North-Central Sweden	10	C24 - Manuf. of basic metals	C17 - Manuf. of paper products	A02 - Forestry & logging	C16 - Manuf. of wood products	Q87 – Residential care activities
SE32: Central Norrland	7	A02 - Forestry & logging	C17 - Manuf. of paper products	Q87 – Residential care activities	Q88 - Social work activities without accommodation	P85 - Education
SE33: Upper Norrland	10	B05 - Mining of coal and lignite	A02 - Forestry & logging	C24 - Manuf. of basic metals	C16 - Manuf. of wood products	Q87 – Residential care activities

Source: ECCP (2022), own elaboration based on data from Eurostat

Overall, there are fewer numbers of ecosystem nodes compared to the regionally relevant sectoral nodes by NACE sectors. This more concentrated agglomeration can at least partially be linked to the methodology of measurement of the 14 industrial ecosystems. For the capital region of Stockholm (SE11), sectors such as publishing activities (J58) and computer programming, consultancy and related activities (J62) are among the most relevant sectoral nodes (NACE) which is also reflected in the regions regionally relevant ecosystem nodes “Digital” and “Cultural and creative industries”. Similarly, for a number of Swedish regions (e.g., SE21: East-Central Sweden) health related sectors such as residential care activities (Q87) are among the most relevant sectoral nodes (NACE) which is also reflected in the regions regionally relevant ecosystem nodes (“Health”) as well as the countries overall strength in the industrial ecosystem “Health” (see Figure 1).

⁸ for more information on the methodology please see the methodology note: <https://clustercollaboration.eu/in-focus/policy-acceleration/country-factsheets-on-cluster-policies-and-programmes> (last access 09.01.2023)



Table 2: Regionally relevant ecosystem nodes by region

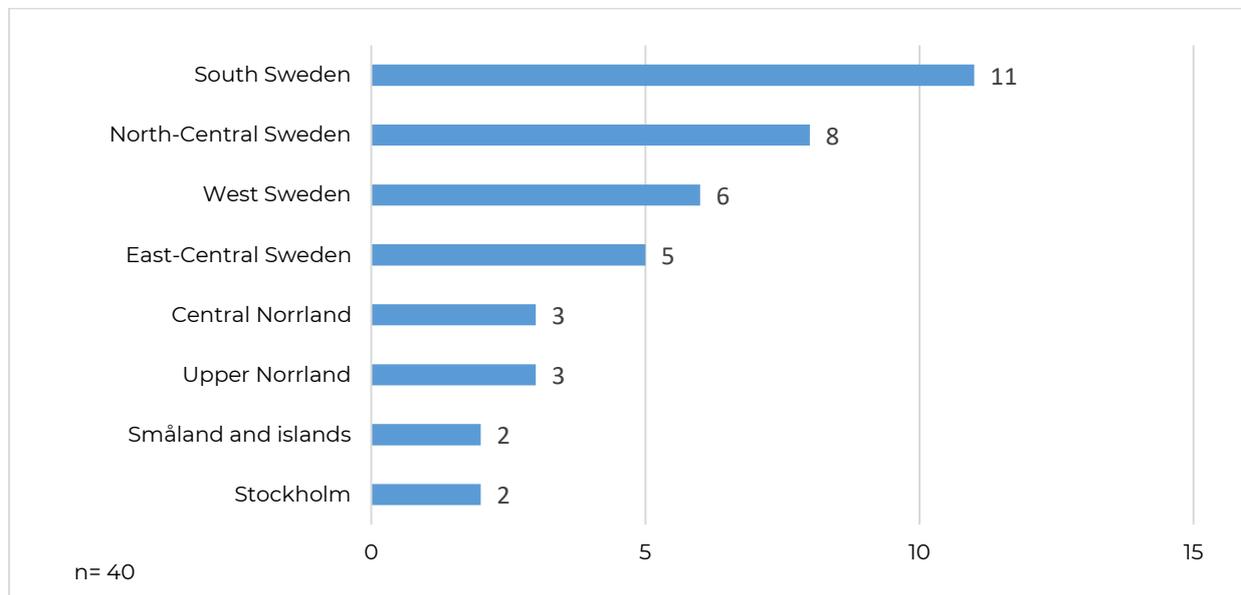
Region	Number of ecosystem nodes	Node 1	Node 2
SE11: Stockholm	2	Digital	Cultural and creative industries
SE12: East-Central Sweden	1	Health	-
SE21: Småland and islands	1	Energy-intensive industries	-
SE22: South Sweden	0	-	-
SE23: West Sweden	0	-	-
SE31: North-Central Sweden	1	Energy-intensive industries	-
SE32: Central Norrland	1	Health	-
SE33: Upper Norrland	1	Health	-

Source: ECCP (2022), own elaboration based on data from Eurostat

Cluster organisations in the regions

There are 40 cluster organisations registered on the ECCP from Sweden. The majority of these cluster organisations are located in South Sweden (11 cluster organisations) followed by North-Central Sweden and West Sweden with 8 and 6 registered cluster organisations respectively. The following figure shows the presence of cluster organisations in the different regions.

Figure 2: Cluster organisations profiled on the ECCP



Source: ECCP (2022). Note: the data for the analysis was extracted on 14/10/2022

SMEs (83%, EU: 84%) followed by large enterprises (13%, EU: 9%) and research organisations (4%, EU:7%) constitute the majority of member organisations of Swedish cluster organisations with profiles on the ECCP. From a thematic perspective, these Swedish cluster organisations are operating in the following industrial ecosystems. Since not all cluster organisations on the ECCP provided this



information, the number of cluster organisations with an allocated industrial ecosystem is lower than the overall number of cluster organisations in the country.

- Digital (5 cluster organisations)
- Renewable Energy (3 cluster organisations)
- Agri-food (2 cluster organisations)
- Creative & Cultural Industries (2 cluster organisations)
- Energy Intensive Industries (2 cluster organisations)
- Mobility-Transport-Automotive (1 cluster organisation)
- Tourism (1 cluster organisation)
- Health (1 cluster organisation)
- Aerospace & Defence (1 cluster organisation)
- Textile (1 cluster organisation)

02

National cluster policy, programmes and initiatives



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2. National cluster policy, programmes and initiatives

In this section we provide an overview of the existing Swedish cluster policies on a national level.

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 the case of a Swedish national broad policy. Within the table the text presented in bold (black) depicts standardised categories across country factsheets (56 in total for 2022), which is applied for the comparative purposes. This is followed by a complementary descriptive text to provide more insights about the policy in Sweden.

Policy type:	Broad Policy
<i>Policy name:</i>	National strategy for sustainable regional development throughout the country 2021-2023
POLICY OBJECTIVES 	<p>Strengthening cooperation between companies or industry and RTDI actors</p> <p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <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</p> <p>Strengthen innovation capacity is among the strategic areas and priorities for 2021– 2030, especially SMEs and between the private sector and R&I actors in general. The National strategy has prioritized innovation & entrepreneurship, attractive environments and accessibility, provision & skills and international cooperation. The strategy is focused on giving the regions the opportunity to grow and develop based on their own specific regional conditions. This requires efforts and collaboration in a variety of sectors and at all levels of society.</p>



Policy type:	Broad Policy
Policy name:	National strategy for sustainable regional development throughout the country 2021-2023
POLICY FOCUS 	<p>No specific focus</p> <p>The strategy has no specific sector, i.e. a broad focus as the focus lies on regional development as such. The strategy presents the national priorities for regional policy 2021-2023 and puts the main focus on: accommodation, work & welfare; competence development & provision; innovation & entrepreneurship; digital communication & transport.</p>
RESPONSIBLE AUTHORITIES 	<p>In charge of drafting</p> <p>Provides funding</p> <p>Oversees the implementation</p> <p>The strategy is issued by the Swedish Ministry for Enterprise and Innovation and decided in the Swedish parliament. The strategy is central to the regional development policies. National as well as regional authorities play an important role for the implementation of the strategy.</p>
BENEFICIARIES 	<p>SMEs</p> <p>Cluster organisations</p> <p>Research organisations</p> <p>Academic institutions</p> <p>Large firms</p> <p>General population</p> <p>The main beneficiaries of the strategy are companies (of all kinds), research and academic institutions. Clusters are mentioned concerning cooperation possibilities between different types of actors. The general population is also meant to benefit from the strategy as competence development or habitation are also addressed by the strategy.</p>
Financial	N/A



Policy type:		Broad Policy
Policy name:		National strategy for sustainable regional development throughout the country 2021-2023
INSTRUMENTS 	Technical assistance	N/A
	Explanation	<p>The strategy as such does not outline specific financial or non-financial instruments (of course, the strategy is related to other important programs and initiatives such as the ERDF-programs, and other national or regional funding). It is up to the Swedish regions and municipality of Gotland to establish specific efforts for the specific counties based on the priority areas developed by the main strategy. The regions in Sweden are responsible for regional development of their counties.</p>
HISTORY 	Period	Limited period
	Ending year <i>(for policies with limited period)</i>	2030
	Starting year	2021
	Explanation	<p>The strategy presents the National priorities for regional policy 2021-2030. The strategy is in line with Agenda 2030.</p>



Policy type:		Broad Policy
Policy name:		National strategy for sustainable regional development throughout the country 2021-2023
BUDGET 	Overall	There is no budget directly assigned to the strategy. The regions will decide on how to implement the strategy and which state funds can be used for which measure.
	Annual	N/A
	Source of funding	The regions can use the grant "Regional growth measures" and financial means by the ERD and JTF 2021-2027. In addition, efforts can be co-financed by government authorities and other actors at local, regional, national and international level.
POLICY EVALUATION 	Availability	Ex-post
	Results	For the ongoing strategy, the regions are obliged to analyze, follow up and evaluate the progress of their regional development based on economic, social and environmental sustainability.
POLICY ALIGNMENT WITH THE EU PRIORITIES 		Green economy Digitalisation Resilience

Source: ECCP (2022)

03

State of play of cluster policy



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3. State of play of cluster policy

This section presents an overview on the state of play of Swedish 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 2, which receive a score based on the existence or absence of a given element in the cluster policy.

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 Sweden** for 2022. The total score of Sweden is 3 points out of 8.

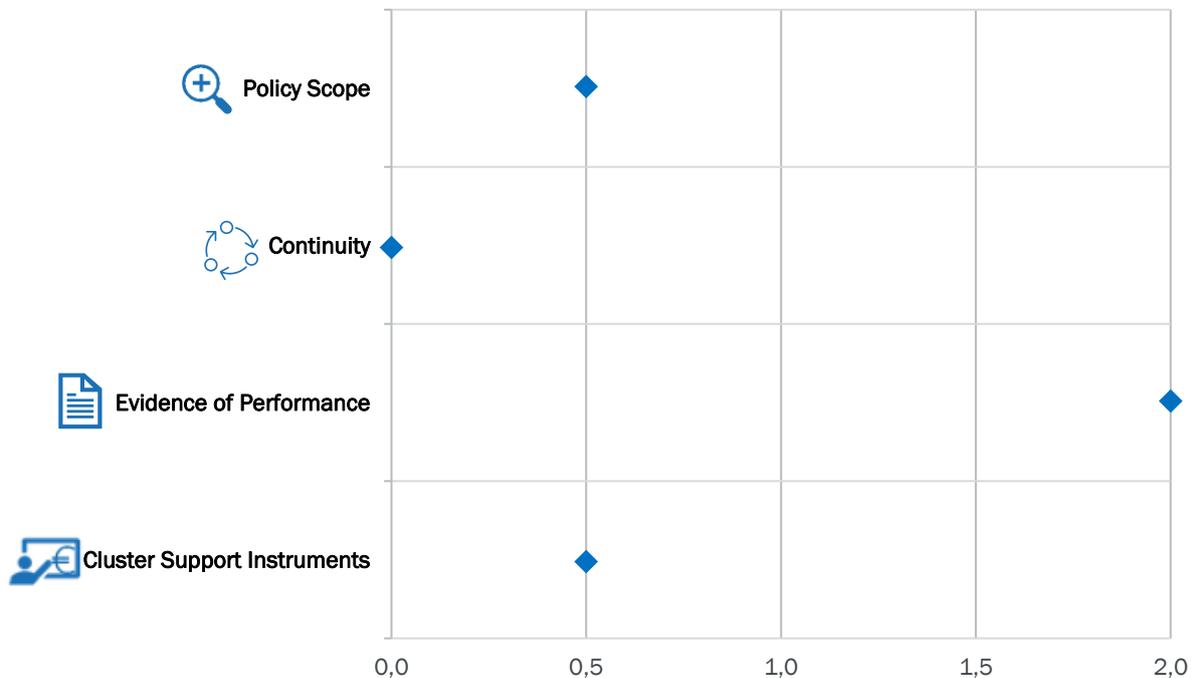
Sweden	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	0,5
	Sectoral policy	1	
	National and/or regional cluster policy	2	
CONTINUITY	No cluster-specific policy available	0	0
	Cluster policy established recently	0,5	
	Cluster policy established between 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	
	Existence of monitoring or an ongoing / interim evaluation	1	
	Existence of monitoring and ex-ante or ongoing / interim evaluation	2	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)			3

Source: ECCP (2022)



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

Figure 3: Maturity of cluster policy - Sweden



Source: ECCP (2022)

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

Policy scope

Although there is no national strategy present at the moment, cluster policy in Sweden has a longstanding history in economic policy development. The current strategy, National strategy for sustainable regional development throughout the country, sees cluster as one central input towards strong regional innovation systems and smart specialization but also in the area of sustainable economy.

Continuity

The development of clusters has been a tool in business sector development in Sweden since the late 1990s. A study of Swedish cluster policies conducted by Harvard Business School and Stockholm School of Economics found that despite the private sector and academia encouraging cluster development, Swedish economic policy had for a long time taken a sceptical stance. Sweden has a long academic tradition of collaboration in specific geographic contexts. Furthermore, enterprises, academia, and the public sector have on own initiative shared an interest in innovation systems and triple helix collaboration. The 2004 national strategy for innovation introduced the cluster terminology in the context of a major economic policy strategy. Six sector specific industrial strategies for the leading sectors of the Swedish economy were established on the background of the strategy.



Since the second half of the 1990s, a focus has been on policies that could increase economic growth by exploiting growth potential in all regions of the country. The geographical county or region was thus given increased responsibility for stimulating the country's growth, something that was previously primarily seen as one state national matter. Focus on innovation based on local and regional conditions therefore became a central part of the regional growth policy. The cluster policy of the Skåne Region 2017-2021 is a good illustration of this. In the 1990s, the regional authorities established a development structure to encourage and support innovative entrepreneurship. In the beginning of the 2000s, the region introduced sectoral triple helix collaboration for increased competitiveness and thereby turned the policy focus from traditional clusters and corporate networks to regional innovation systems and international collaborations. From 2010s and onwards, the region has a policy emphasis on challenge-driven innovation for global competitiveness.

The Vinnväxt programme for clusters offered by Vinnova is an important source of funding for regional clusters. The programme, which is run by Swedish Innovation Agency Vinnova since 2001, is the flagship project of Swedish cluster policies. In 2003, the first three regional clusters were selected through national calls for proposals for a ten-year programme with up to approx. EUR 600-800 000 annual funding per innovation cluster, along with advisory and process support. Another five clusters were selected in 2004 and four more in 2008 were admitted to the programme. New clusters have been selected in 2013, 2016 and 2019: three clusters at each time. The programme generally enjoys high marks internationally. Vinnväxt programme aims to promote sustainable innovation-driven regional growth by developing internationally competitive research and innovation environments in specific growth fields. The 10-year-funding-cycles are indeed long-term funding which cluster organisations praise as huge benefit for proper establishment of projects.

Evidence of performance

Smart specialisation strategies: There is an ongoing programme evaluation of thematic objective 1 in ERDF 2014-2020, and by termination of the policy in 2021, a final evaluation will be executed as well. Furthermore, as regions develop their smart specialised strategies, they may use the national network (S3 Network) for peer review and discussions. The network is administrated by the Swedish Agency for Economic and Regional Growth Tillväxtverket.

Cluster support instruments

Cluster are mainly supported in Sweden by regional/national development agencies. Especially relevant are Vinnova and the Swedish Agency for Economic and Regional Growth Tillväxtverket.

Several government-initiated opportunities for financial and technical support for cluster organisations exist in Sweden. The government designed the Innovation Programmes through which cluster organisations can apply for funding. Collaboration has also started to grow between some of them and innovation clusters. Swedish Innovation Agency Vinnova, the Swedish Energy Agency, and the Swedish Research Council Formas jointly finance a total of 17 strategic innovation programmes. The Swedish Innovation Agency Vinnova supports the implementation of the innovation programmes, among other things through process and method support and evaluation/monitoring.

Cross-regional / international cooperation

In the 2014-2020 funding period, the European Cluster Partnerships and the INNOSUP-1 initiative have been launched by the European Commission to encourage clusters from Europe to intensify collaboration across regions and sectors. Swedish cluster organizations have been involved in 18 consortia of the European Strategic Cluster Partnerships out of which 13 partnerships were focusing on internationalisation (ESCP-4i), four partnerships were on cluster management excellence (ESCP-4x) and one partnership focused on smart specialisation (ESCP-S3). Consortia partners came from 18 different EU member states (AT, BE, CZ, DE, DK, EE, ES, FI, FR, HU, IT, LV, NL, PL, PT, UK, RO, SI). Six Swedish cluster organizations participated in the INNOSUP-1 initiative with partner organisations coming from 19 countries (AT, BE, DE, DK, EE, ES, FI, FR, HU, IE, IT, LT, NL, NO, PL, PT, UK, RO, SI).



In the 2021-2027 funding period, the Single Market Programme supports clusters as part of the Joint Cluster Initiatives (Euroclusters) for Europe's recovery. From Sweden, four clusters are part of four Euroclusters with partners from 15 countries (ES, FR, DK, NO, BE, PL, PT, CZ, IT, FI, NL, AT, DE, BG, RO). These Euroclusters are ELBE Eurocluster, PIMAP4SUSTAINABILITY, Silicon Eurocluster and SocialTech4EU. Collectively, they cover five industrial ecosystems, with "Renewables" (ELBE Eurocluster), "Electronics" (Silicon Eurocluster), "Proximity and social economy" (SocialTech4EU) and "Energy intensive industries" and "Aerospace and defence" (PIMAP4SUSTAINABILITY).

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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)