



EUROPEAN CLUSTER
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Country factsheet

Croatia

An initiative of the European Union





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Introduction



This document presents an overview of the cluster policy in Croatia. 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 for Croatia](#).

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.

As a consequence of the COVID-19 pandemic, European as well as global economies have been subject to severe output losses. 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. Clusters are directly mentioned and eligible for grants in the [Croatian National recovery and resilience plan](#). 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.

Croatia will receive a total of €9 billion from Cohesion Policy in 2021-2027 in the framework of its [Partnership Agreement](#) with the Commission to promote the economic, social and territorial cohesion of its regions and its green and digital transitions. These investments will help reduce regional economic disparities and enhance skills, training, and employment opportunities. The EU funds will also support the development of a competitive, innovative, and export-oriented Croatian economy. Clusters are mentioned once with regard to tourism clusters.

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

- 1) an overview of the industrial ecosystems and cluster landscape in Croatia
- 2) an overview of the national cluster policy,
- 3) an assessment of the state of play of the national cluster policy.

01

Industrial ecosystems and cluster landscape



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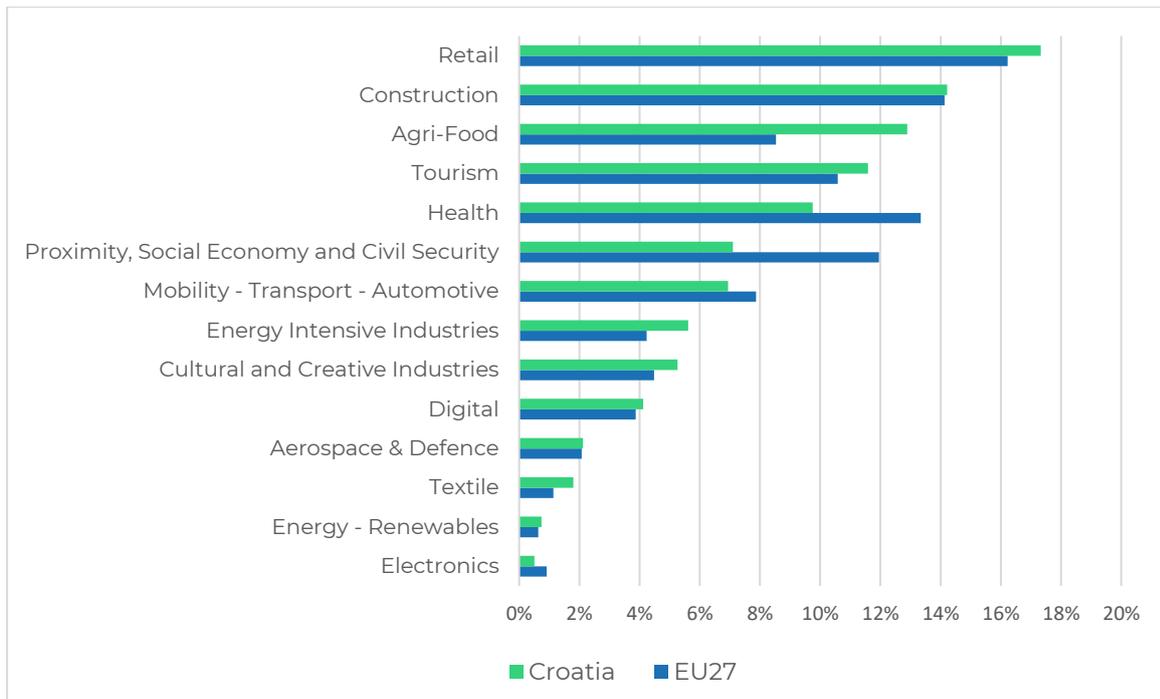
1. Industrial ecosystems and cluster landscape

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.¹ The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2 -digit activities, following the methodology established in the European Commission.²

In Figure 1, the employment share of Croatia and the EU27 on average in each industrial ecosystem is shown relative to the number of employed persons in the 14 industrial ecosystems. It 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.

Figure 1: Employment in the ecosystems



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

"Retail" is the leading industrial ecosystem in Croatia, employing around 17% of the workforce across all ecosystems. It is closely followed by "Construction" at 14% and "Agri-Food" at 13%, which shows a relatively high share compared to the EU27 level, indicating Croatia's proficiency in this sector. Moreover, the "Tourism" ecosystem is also significant, accounting for 12% of employment and surpassing the EU27 level. Croatia also has other ecosystems that exhibit a comparative strength over the EU27, including "Energy Intensive Industries," "Cultural and Creative Industries," "Digital,"

¹ see here for more information <https://clustercollaboration.eu/in-focus/industrial-ecosystems> (last access 09.01.2023)

² see European Commission (2021): Annual Single Market Report, SWD(2021)351.



"Aerospace & Defence," "Textile," and "Energy-Renewables". The regional relevance of some of these industries is evident in the sectoral and ecosystem nodes that prevail across the two Croatian NUTS 2 regions, as discussed in the section below.

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.³ The following tables show 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 14 in the country, while the second table is based on the 14 ecosystems, which total 3 in the country.

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

Region	# of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
HR03: Adriatic Croatia	8	I55 - Accommodation	E38 - Waste activities	C33 – Repair and installation of machinery and equipment	C23 – Manuf. of other non-metallic mineral products	F42 – Civil engineering
HR04: Continental Croatia	6	C16 - Manuf. of wood products	E38 - Waste activities	C10 – Manuf. of food products	F42 – Civil engineering	C33 – Repair and installation of machinery and equipment

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 region "Adriatic Croatia" (HR03), the accommodation sector (I55) is the most relevant sectoral node (NACE). This specialization node is also reflected in the region's regionally relevant ecosystem node "Tourism" and the country's overall strength in this industrial ecosystem. On the other hand, for the region Continental Croatia (HR04), the specialization nodes are mainly characterized by the manufacturing sectors, such as the manufacturing of wood products (C16), the repair and installation of machinery and equipment as well as the manufacturing of food products (C10). The latter can be reflected in one of the region's regionally relevant ecosystem nodes "Agri-Food", the other one being "Textile".

Table 2: Regionally relevant ecosystem nodes

Region	# of ecosystem nodes	Node 1	Node 2
HR03: Adriatic Croatia	1	Tourism	-
HR04: Continental Croatia	2	Textile	Agri-Food

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

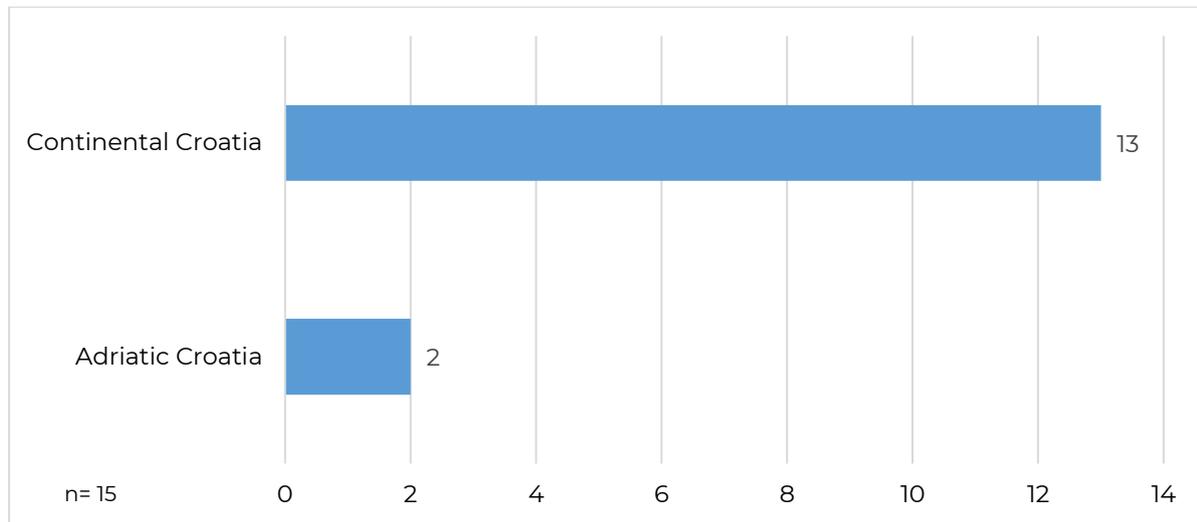
³ for more information on the methodology please see the methodology note: <https://clustercollaboration.eu/in-focus/policy-acceleration/country-factsheets-on-cluster-policies-and-programmes> (last access 09.01.2023)



Cluster organisations in the regions

There are 15 cluster organisations registered on the ECCP in the country. With 13 cluster organisations the majority of these registered cluster organisations is located in Continental Croatia. The following figure shows the presence of cluster organisations in the different regions.

Figure 2: Cluster organisations profiled and active on the ECCP



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

The majority of member organisations of Croatian cluster organisations with profiles on the ECCP are composed of SMEs (70%, EU: 84%), followed by research organisations (17%, EU: 7%), and large enterprises (13%, EU: 9%). From a thematic perspective, these Croatian 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.

- Health (1 cluster organisation)
- Aerospace & Defence (1 cluster organisation)
- Proximity & Social Economy (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 Croatian cluster policies on a national level, namely the first national strategy for cluster development, adopted in 2011 as well as the Croatian Competitiveness Clusters (CCCs) as part of the country's Smart Specialisation Strategy.

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 the Plans for Industrial Transition.

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 Croatia.

Policy type:	Broad policy
Policy name:	Plans for Industrial Transition
POLICY OBJECTIVES 	<ul style="list-style-type: none"> Strengthening cooperation between companies or industry and RTDI actors Supporting internationalisation activities Fostering R&D activities, technology development and implementation Fostering innovation and strengthening innovation ecosystems Supporting cluster excellence and professionalisation of cluster management Supporting the consolidation of existing cluster organisations Supporting the creation of new cluster organisations Promoting entrepreneurship, start-ups and spin-offs Promoting employment and upgrading skills and competences Enhancing territorial cohesion (through RIS3) Strengthening the network of cluster organisations/cross-clustering



Policy type:	Broad policy																		
Policy name:	Plans for Industrial Transition																		
	<p>The Plans for Industrial Transition (PIT) and are regional development plans targeting Croatia's Pannonian, Northern and Adriatic regions which are lagging the EU average in terms of economic development. They are part of the Integrated Territorial Programme 2021-2027 which, in turn, is referring to the Croatian National Development Strategy 2030 (Strategic Goal 13: "Strengthening regional competitiveness"). One of the programmed interventions aims at innovation clusters, supporting their specialization towards priority niches specified within Plans for industrial transition for each region with supporting action plans for 14 regional value chains (RVC).</p> <p>The main objective is to create effective regional innovation systems and to boost private sector R&I investment. To support this objective, the ITP envisages 17 'innovation clusters' until 2024 and 50 until 2029. It includes the creation of new as well as the upgrading of existing cluster organisations. Another objective is to support research and development including the research and technological infrastructure to enable entrepreneurs to diversify their business into the priority RVCs. There is also a skill development component to develop the workforce towards the RVC areas. Furthermore, internationalisation and integration of cluster-related activities into macro-regional strategies like the Strategy for the Danube Region is taken into account.</p>																		
<p>POLICY FOCUS</p> 	<p>Sectoral</p> <p>The Plans for Industrial Transition define priority Regional Value Chains (RVC) for each of the three regions.</p> <table border="1"> <thead> <tr> <th><u>Pannonian RVCs</u></th> <th><u>Northern RVCs</u></th> <th><u>Adriatic RVCs</u></th> </tr> </thead> <tbody> <tr> <td>Agri-food</td> <td>Smart industries</td> <td>Blue growth</td> </tr> <tr> <td>Smart and creative industries</td> <td>Vehicle manufacturing</td> <td>Smart industries</td> </tr> <tr> <td>Green growth</td> <td>Healthcare industry</td> <td>Health</td> </tr> <tr> <td>Continental tourism</td> <td>Green growth</td> <td>Green growth</td> </tr> <tr> <td></td> <td>High value-added services</td> <td>High value-added services</td> </tr> </tbody> </table>	<u>Pannonian RVCs</u>	<u>Northern RVCs</u>	<u>Adriatic RVCs</u>	Agri-food	Smart industries	Blue growth	Smart and creative industries	Vehicle manufacturing	Smart industries	Green growth	Healthcare industry	Health	Continental tourism	Green growth	Green growth		High value-added services	High value-added services
<u>Pannonian RVCs</u>	<u>Northern RVCs</u>	<u>Adriatic RVCs</u>																	
Agri-food	Smart industries	Blue growth																	
Smart and creative industries	Vehicle manufacturing	Smart industries																	
Green growth	Healthcare industry	Health																	
Continental tourism	Green growth	Green growth																	
	High value-added services	High value-added services																	



Policy type:	Broad policy
Policy name:	Plans for Industrial Transition
<p>RESPONSIBLE</p>  <p>AUTHORITIES</p>	<p>Both drafting and implementation</p> <p>Oversees the implementation</p> <p>The ITP 2021-2027 was drafted by the Ministry of Regional Development and EU Funds which is also overseeing its implementation. The PITs were drafted by regional bodies established for this purpose consisting of officials from regional and national governments as well as stakeholders from businesses, research and business associations.</p>
<p>BENEFICIARIES</p> 	<p>SMEs</p> <p>Cluster organisations</p> <p>Research organisations</p> <p>Academic institutions</p> <p>Start-ups</p> <p>Large firms</p> <p>Through the Industrial transition of Croatian NUTS2 regions, support is also given to SMEs and innovative start-ups to transition towards the new niches defined within Plans for Industrial Transition. The ITP specifies the following main target groups:</p> <ul style="list-style-type: none"> - Entrepreneurs (start-up companies, micro, small, medium and large enterprises) - Innovation clusters (cluster organisations) - Organisations for research and dissemination of knowledge - Public sector (regional and local self-government, departmental bodies of state administration, public enterprises) - Institutions engaged in R&D activities



Policy type:		Broad policy
Policy name:		Plans for Industrial Transition
INSTRUMENTS 	Financial	Funding collaboration initiatives Support to R&D projects, SMEs becoming cluster members, etc. Application to labelling schemes and similar initiatives Financing networking events Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects) Financing start-ups
	Technical assistance	Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc. Support for soft skills development: coaching, management training, upskilling/reskilling Support for networking and partnership building (at national and/or international level) Marketing activities: advertising, communication, events, fairs, and so on
	Explanation	<p>Under Specific objective 1.1, support instruments focus on strategic partnerships for innovation, consisting of consortia of at least three partners of which at least two are SMEs and, if necessary, partners from the research or the public sector. They receive grants for research and development (industrial research, prototyping, feasibility studies) and support for the development of research and technological infrastructure enabling businesses to diversify their business and to develop new products.</p> <p>Furthermore, calls for innovation clusters shall foster the networking of stakeholders within regional value chains through investment grants for the construction or upgrading of innovation clusters and through operational grants aimed at training and internationalisation of cluster members.</p> <p>Under Specific objective 1.3 there is support through financial instruments for the commercialisation of innovation and the transition to the production of new products of higher added value. De minimis grants support innovative start-up companies and SMEs in the diversification and modernisation of production, introduction of new quality standards and internationalisation. Additionally, there is support for the branding and internationalisation of regional ecosystems.</p>



Policy type:		Broad policy
Policy name:		Plans for Industrial Transition
		Another area of support is the provision of business infrastructure. In rural areas it shall be specialised on SMEs and the local economy. In urban areas it focuses on business support centres, business incubators/accelerators, coworking spaces, centres of creative industries, etc., in order to establish urban areas as regional centres and strengthening their role in regional ecosystems.
HISTORY 	Period	Limited period
	Ending year <i>(for policies with limited period)</i>	2029
	Starting year	2021
	Explanation	The Plans for Industrial Transition are settled within the ITP 2021-2027. Programmes will run until 2029.
BUDGET 	Overall	EUR 330 million under Specific objective 1.1 and EUR 191 million under Specific objective 1.3 of which EUR 10 million (under 1.1) are reserved for the support of innovation clusters.
	Annual	-
	Source of funding	ITP 2021-2027, cluster organisations are supported under Objective 1.1, measure 26 "Support for innovation clusters, including between business entities, research organizations and public bodies and business networks primarily for the benefit of SMEs" (see page 30).



Policy type:		Broad policy
Policy name:		Plans for Industrial Transition
POLICY  EVALUATION	Availability	No policy evaluation.
	Results	<p>The ITP 2021-2027 is building on evaluations of past policy evaluations including the mid-term evaluation of the Smart Specialisation Strategy (2016-2020) and policy notes prepared by the World Bank in the process of drafting the National Development Strategy 2030.</p> <p>The ITP 2021-2027 draws on the monitoring and evaluation system established in 2018 for the Smart Specialisation Strategy. An evaluation plan for the Partnership Agreement in general and the ITP in particular will be prepared.</p>
POLICY ALIGNMENT WITH THE EU PRIORITIES 		Green economy Digitalisation

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 Croatian 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 Croatia for 2022**. The total score of Croatia is 1,5 points out of 8.

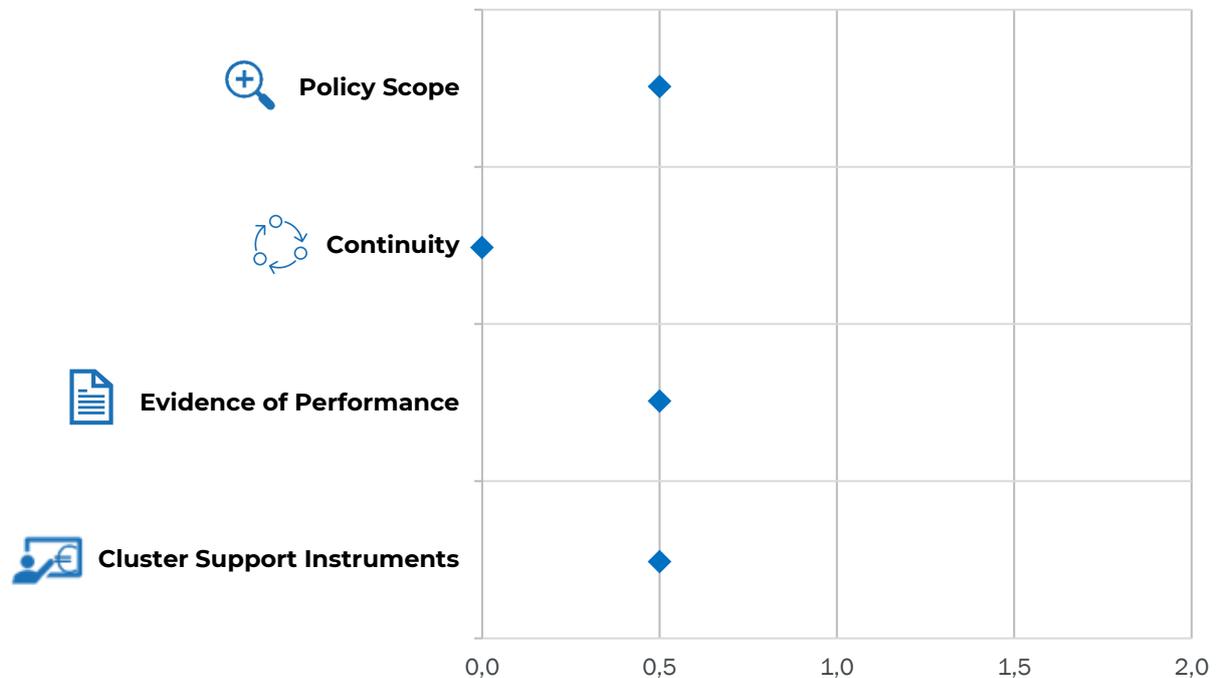
Croatia	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	0,5
	Sectoral policy	1	
	National and/or regional cluster policy	2	
CONTINUITY	No cluster-specific policy available	0	0
	Cluster policy established recently	0,5	
	Cluster policy established 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 Croatia'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 - Croatia



Source: ECCP (2022)

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

Policy scope

The Plans for Industrial Transition (PIT) and are regional development plans targeting Croatia's Pannonian, Northern and Adriatic regions which are lagging the EU average in terms of economic development. They are part of the Integrated Territorial Programme 2021-2027 which, in turn, is referring to the Croatian National Development Strategy 2030 (Strategic Goal 13: "Strengthening regional competitiveness"). One of the programmed interventions aims at innovation clusters, supporting their specialization towards priority niches specified within [Plans for Industrial Transition](#) for each region with supporting action plans for 14 regional value chains (RVC).

The main objective is to create effective regional innovation systems and to boost private sector R&I investment. To support this objective, the ITP envisages 17 'innovation clusters' until 2024 and 50 until 2029. It includes the creation of new as well as the upgrading of existing cluster organisations. Another objective is to support research and development including the research and technological infrastructure to enable entrepreneurs to diversify their business into the priority RVCs. There is also a skill development component to develop the workforce towards the RVC areas. Furthermore, internationalisation and integration of cluster-related activities into macro-regional strategies like the Strategy for the Danube Region is taken into account.



Continuity

The cluster development policy started in Croatia in 2011, when the Cluster development strategy in the Republic of Croatia 2011-2020 was adopted. In 2016, as part of the Croatian Smart Specialisation Strategy, Croatia introduced the concept of competitiveness clusters as important policy tools for smart specialisation of the country. Croatian Competitiveness clusters' (CCCs) main goal is to strengthen national industries/ sectors. 13 CCCs have been created in the automotive, wood-processing, food-processing industry, defence, chemical, electro and production machinery and technologies, ICT, maritime, construction, textile, health, personalized medicine, creative and cultural industries.

The Croatian Competitiveness Clusters programme was not prolonged after 2020. Instead, the Integrated Territorial Partnership 2021-2027 has taken up cluster development as part of its mission.

Evidence of performance

There is no official evaluation of the Croatian cluster development policy available.

In a survey study Anić et al. (2019) followed up on the top-down Croatian Competitiveness Clusters (CCC) policy that was created to support cluster development and smart specialisation from 2016 onwards. Although only capturing its early-stage outcomes, it confirms the problems analysed by previous studies. Evaluating the feedback of 250 cluster members from 13 CCCs, the authors find that the “perceived performance of CCC is very low” and “the members of CCC have not been able [...] to see any value of their participation in CCC” (p. 2242). Reasons are both the structural problems of low innovation activity and productivity as described by Bečić and Švarc (2015) and the crucial institutional problem of low level of trust between key actors as argued by Dragičević and Obadić (2014). On top of that, business support and programme management were weak and there was only limited commitment and involvement by the participants. Finally, the programme lacked sufficient funding to build sufficient capacities.

Cluster support instruments

Under Specific objective 1.1, support instruments focus on strategic partnerships for innovation, consisting of consortia of at least three partners of which at least two are SMEs and, if necessary, partners from the research or the public sector. They receive grants for research and development (industrial research, prototyping, feasibility studies) and support for the development of research and technological infrastructure enabling businesses to diversify their business and to develop new products.

Furthermore, calls for innovation clusters shall foster the networking of stakeholders within regional value chains through investment grants for the construction or upgrading of innovation clusters and through operational grants aimed at training and internationalisation of cluster members.

Under Specific objective 1.3 there is support through financial instruments for the commercialisation of innovation and the transition to the production of new products of higher added value. De minimis grants support innovative start-up companies and SMEs in the diversification and modernisation of production, introduction of new quality standards and internationalisation. Additionally, there is support for the branding and internationalisation of regional ecosystems.

Another area of support is the provision of business infrastructure. In rural areas it shall be specialised on SMEs and the local economy. In urban areas it focuses on business support centres, business incubators/accelerators, coworking spaces, centres of creative industries, etc., in order to establish urban areas as regional centres and strengthening their role in regional ecosystems.



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. Croatian cluster organisations have not been involved in any consortia of the European Strategic Cluster Partnerships or the INNOSUP-1 initiative.

In the 2021-2027 funding period, the Single Market Programme supports clusters as part of the Joint Clusters Initiatives (Euroclusters) for Europe's recovery. From Croatia, one cluster organisation is part of the Eurocluster LEVIATAD, specialising in the ecosystem "Aerospace & Defence", with partners from three countries (IT, FR, BE).

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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).