



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Hungary

An initiative of the European Union





Contents

Introduction	3
1. Industrial ecosystems and cluster landscape	5
Employment in the 14 ecosystems in the country	5
Regionally relevant nodes.....	6
Cluster organisations in the regions	7
2. National cluster policy, programmes and initiatives.....	10
3. State of play of cluster policy	16
Bibliography.....	20
Annex.....	21



Introduction

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

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 unprecedented economic shocks to the European and global economy. In response, policymakers at the 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](#)¹ have been drafted in each Member State to ensure a recovery that addresses the challenges identified in the European Semester. Hungarian clusters are not directly mentioned in the 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.

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

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

¹ National recovery and resilience plan of Hungary, <https://www.palyazat.gov.hu/helyreallitasi-es-ellenallokepesege-eszkoz-rrf>

01

Industrial ecosystems and cluster landscape



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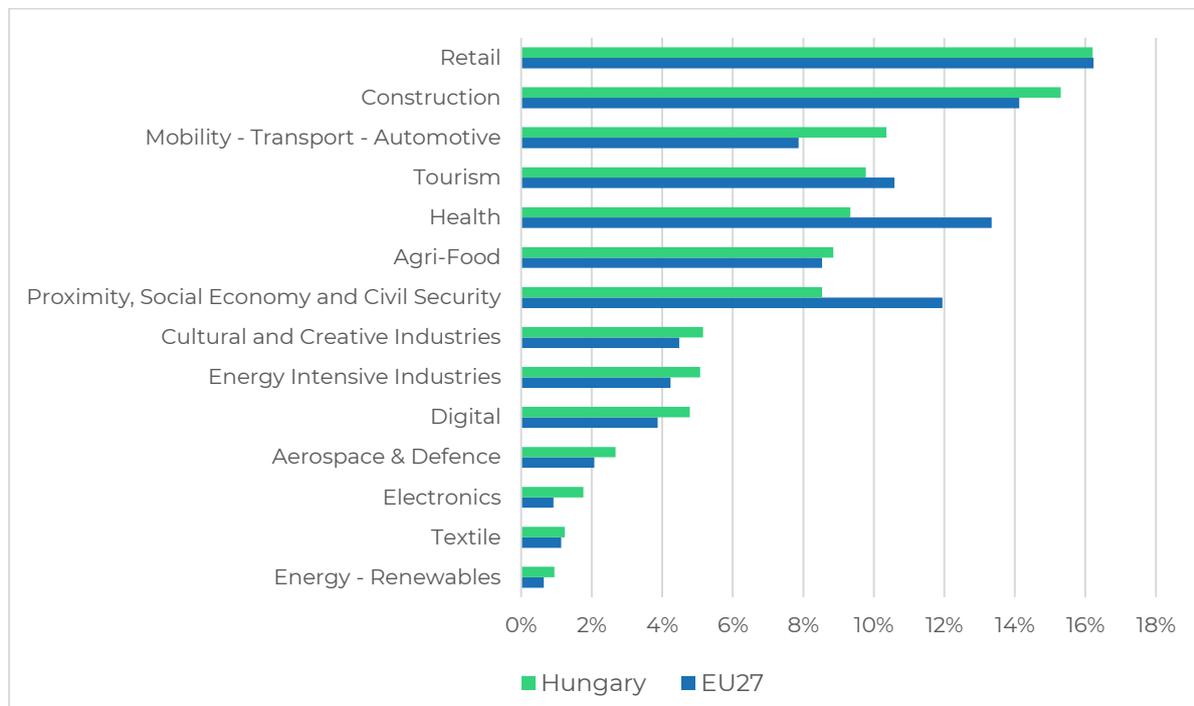
1. Industrial ecosystems and cluster landscape

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.² The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2 -digit activities, following the methodology established in the European Commission.³

In the following figure, the employment share of Hungary 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. “Retail” is the most prominent industrial ecosystem, making up around 16% of the employment in all ecosystems, thus similar to the share of the EU27. This is followed by the industrial ecosystems “Construction” and “Mobility – Transport – Automotive”, both exceeding the respective EU27 share. This shows Hungary’s relative strength in those two ecosystems. Other ecosystems in which Hungary specialises include “Energy Intensive Industries”, “Digital”, “Electronics”, and “Energy-Renewables”. The strength of these industries is apparent in the sectoral and ecosystem nodes that are regionally relevant across most of the eight Hungarian NUTS 2 regions, as shown in the section below.

Figure 1: Employment in the ecosystems



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

² see here for more information <https://clustercollaboration.eu/in-focus/industrial-ecosystems> (last access 09.01.2023).

³ 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.⁴ 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 70 in the country, while the second table is based on the 14 ecosystems, which total 20 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
HU11: Budapest	11	M72 – Scientific research and development	H53 – Postal and courier activities	L68 - Real estate	J62 - Computer programming, consultancy	M70 – Activities of head offices
HU12: Pest	13	C26 - Manuf. of electronic & optical products	C27 - Manuf. of electrical equipment	F42 - Civil engineering	H52 – Warehousing and support activities for transportation	G45 - Wholesale and retail trade and repair of motor vehicles and motorcycles
HU21: Central Transdanubia	8	C24 - Manuf. of basic metals	C29 - Manuf. of motor vehicles & trailers	C27 - Manuf. of electrical equipment	C26 – Manuf. of computer, electronic and optical products	C22 - Manuf. of rubber & plastic products
HU22: West Transdanubia	8	C29 - Manuf. of motor vehicles & trailers	C28 – Manuf. of machinery and equipment	C23 – Manuf. of other non-metallic mineral products	C25 – Manuf. of fabricated metal products	C16 – Manuf. of wood and of products of wood
HU23: South Transdanubia	7	C26 - Manuf. of computer, electronic & optical products	D35 - Electricity, gas & steam	C27 - Manuf. of electrical equipment	F42 - Civil engineering	A01 - Crop & animal production
HU31: North Hungary	8	C26 - Manuf. of computer, electronic & optical products	C29 - Manuf. of motor vehicles & trailers	C20 - Manuf. of chemical products	C25 – Manuf. of fabricated metal products	C28 – Manuf. of machinery and equipment
HU32: North Great Plain	8	C15 - Manuf. of leather products	C32 - Other manufacturing	C26 - Manuf. of computer, electronic & optical products	C14 – Manuf. of wearing apparel	C22 - Manuf. of rubber & plastic products
HU33: South Great Plain	7	A02 - Forestry and logging	C10 – Manuf. of food products	C22 - Manuf. of rubber & plastic products	F42 - Civil engineering	A01 - Crop & animal production

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.

Hungary's industrial ecosystems can be divided into three main groups. First, there is the capital region of Budapest (HU11), whose digital ecosystem node is reflected in its sectoral NACE node in computer, programming, consultancy (J62), while the "Aerospace and Defence" node shows up in the NACE nodes as security and investigation activities (N80) and warehousing and support activities for transportation (H52) which are not among the top 5 but rank on a strong sixth and seventh place respectively. The region of Pest (HU12) represents the immediate hinterland of Budapest and includes a mixture between NACE nodes in logistics (H52) and wholesale and retail trade of motor vehicles

⁴ 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).



(G45) as well as an ecosystem node in “Electronics” pulled by its two top NACE nodes in the manufacture of computer, electronic, and optical products and electrical equipment (C26-27).

Second, the North-Western regions of Central, West, and to a certain extent North Hungary (HU21-22, HU31) are deeply integrated in European manufacturing value chains expressed in their ecosystem nodes in “Mobility-Transport-Automotive”, “Energy-intensive industries”, and “Electronics”. Relatedly, in these regions, all top 5 NACE nodes are in manufacturing. While the composition in each region varies, all of them host manufacture in motor vehicles (C29). Other strong sectors are the manufacture of computer, electric and optical products (C26), machinery and equipment (C28), and fabricated metal products (C25), all present in two of the three regions.

The third group is represented by the South-Eastern Hungarian regions of South Transdanubia, North Great Plain and South Great Plain (HU23, HU32-33) and is centred on agri-food ecosystems, accompanied by some light manufacturing in textiles, electronics or energy-renewables. The agri-food focus is most pronounced in the South Great Plain (HU33) region with NACE nodes in crop and animal production (A01), manufacture of food products (C10), and forestry and logging (A02). North Great Plain (HU32) is more steeped in textiles with NACE nodes in the manufacture of leather products (C15) and wearing apparel (C14). By contrast, the South Transdanubia region (HU23) complements its ecosystem nodes in “Agri-Food” with nodes in “Electronics” and “Energy-Renewables”. The first is echoed by the NACE nodes in the manufacture of computer, electronic and optical products as well as electrical equipment (C26-27), while the latter shows up as a sectoral node in electricity, gas and steam (D35) driven by the nuclear power plant in Paks.

Table 2: Regionally relevant ecosystem nodes

Region	# of ecosystem nodes	Node 1	Node 2	Node 3	Node 4	Node 5
HU11: Budapest	3	Digital	Cultural and Creative Industries	Aerospace & Defence	-	-
HU12: Pest	1	Electronics	-	-	-	-
HU21: Central Transdanubia	4	Electronics	Energy-renewables	Energy-intensive industries	Mobility-Transport-Automotive	-
HU22: West Transdanubia	4	Mobility-Transport-Automotive	Energy-intensive industries	Textile	Energy-renewables	-
HU23: South Transdanubia	3	Electronics	Energy-renewables	Agri-Food	-	-
HU31: North Hungary	1	Electronics	-	-	-	-
HU32: North Great Plain	3	Textile	Electronics	Agri-Food	-	-
HU33: South Great Plain	1	Agri-Food	-	-	-	-

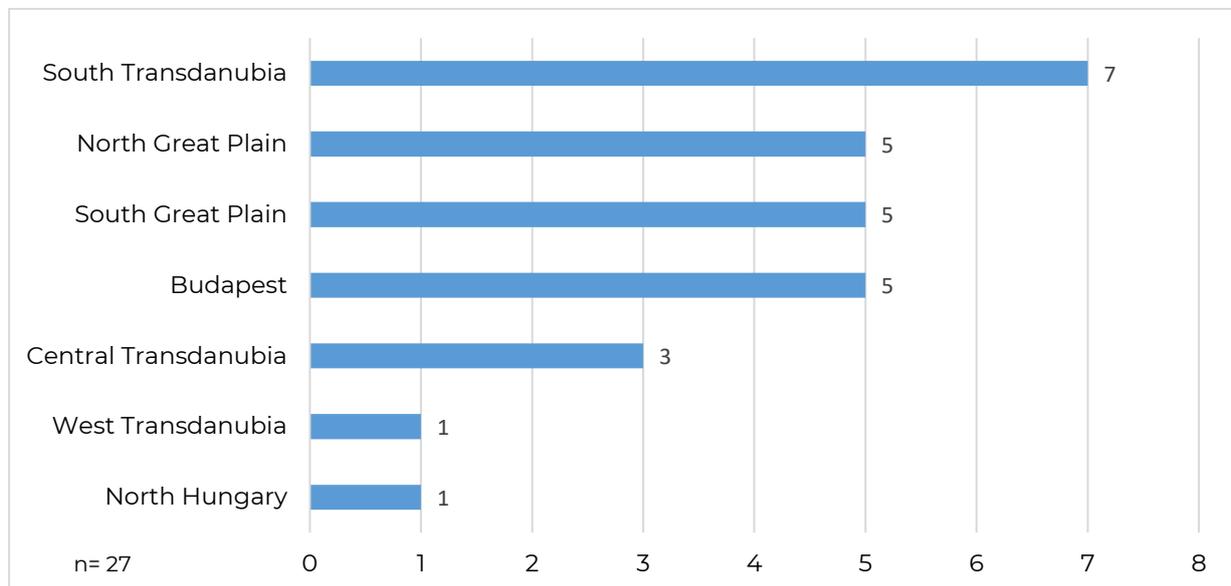
Source: ECCP (2022), own elaboration based on data from Eurostat.



Cluster organisations in the regions

There are 27 cluster organisations registered on the ECCP in the country. The highest number of these cluster organisations are located in the region South Transdanubia. The regions North Great Plain, South Great Plain and the capital region of Budapest are all home to five cluster organisations with profiles on the ECCP. Three cluster organisations are located in Central Transdanubia. West Transdanubia and North Hungary are the regions in which the lowest number of cluster organisations with profiles on the ECCP is present (one cluster organisation). Overall, as a pattern, the more agricultural, less industrialised regions (North and South Great Plain, South Transdanubia) appear to host more cluster organisations profiled on the ECCP than the manufacturing powerhouses in the North-Western parts of the country (Central and West Transdanubia, North Hungary). 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.

The majority of member organizations of Hungarian cluster organizations with profiles on the ECCP are composed of SMEs (87%, EU: 84%), followed by large enterprises (5%, EU: 9%) and research organisations (8%, EU: 7%). From a thematic perspective, these Hungarian 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.

- Agri-food (3 cluster organisations)
- Renewable Energy (2 cluster organisations)
- Health (1 cluster organisation)
- Digital (1 cluster organisation)
- Construction (1 cluster organisation)
- Tourism (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 Hungarian 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 the Hungarian cluster policy, namely the Széchenyi 2020 - Economic Development and Innovation Operational Programme (EDIOP) '14-'20 and the succeeding Széchenyi Plan Plus – Economic Development and Innovation Operational Programme Plus (EDIOP Plus) '21-'27.

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



Policy type:	Broad policy
Policy name:	Széchenyi 2020 - Economic Development and Innovation Operational Programme (EDIOP) '14-'20 Széchenyi Plan Plus – Economic Development and Innovation Operational Programme Plus (EDIOP Plus) '21-'27
<p>POLICY OBJECTIVES</p> 	<p>Strengthening cooperation between companies or industry and RTDI actors</p> <p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Supporting internationalisation activities</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Supporting cluster excellence and professionalisation of cluster management</p> <p>Promoting employment and upgrading skills and competences</p> <p>The EDIOP 's priority areas include improving the competitiveness of SMEs, R&D and innovation, clusters (ICT, energy, and tourism), employment, and creating a more competitive workforce, and developing financial instruments and services.</p> <p>The EDIOP Plus's priority areas include improving the competitiveness of SMEs, R&D and innovation, clusters, skills, youth guarantee and higher education.</p>
<p>POLICY FOCUS</p> 	<p>Cross-sectoral</p> <p>The EDIOP prioritises the ICT, energy, and tourism sectors and supports the overall infrastructure including financial instruments and the competitiveness of all SMEs. EDIOP Plus supports the overall group of all SMEs, however the cluster policy mainly supports the frontrunners of the cutting-edge emerging sectors as defined in the country's S3 Strategy.</p>



RESPONSIBLE AUTHORITIES 		<p>Both drafting and implementation</p> <p>Provides funding</p> <p>Oversees the implementation</p> <p>Prime Minister's Office operating as the managing authority of EDIOP, EDIOP Plus.</p>
BENEFICIARIES 		<p>SMEs</p> <p>Cluster organisations</p> <p>Research organisations</p> <p>Start-ups</p> <p>Large firms</p> <p>NGOs</p> <p>General population</p> <p>Policy makers</p> <p>The EDIOP is expected to benefit SMEs through increased employment and training and innovation and R&D support, done through collaboration with research institutions. There are also provisions for broadband internet and low carbon economy upgrades which will benefit the general population.</p>
INSTRUMENTS 	<p>Financial</p> <p>Technical assistance</p> <p>Explanation</p>	<p>Support to R&D projects, SMEs becoming cluster members, etc.</p> <p>Subsidies for cluster infrastructure</p> <p>Support for soft skills development: coaching, management training, upskilling/reskilling</p> <p>The EDIOP is designed to provide financial support for broad infrastructure and cross-sectoral initiatives such as to spur more SME competitiveness, stimulating R&D developments, providing broadband internet and transitioning to low carbon economy through technology retrofits. The EDIOP Plus is planned to support fostering the competitiveness of SMEs through financing their investments and R&D developments, skills and trainings for a more competitive labour force.</p>



HISTORY 	Period	Limited period
	Ending year <i>(for policies with limited period)</i>	2020 (2030)
	Starting year	2014 (2022)
	Explanation	The current EDIOP aligns with the Europe 2020 strategy and is part of a larger Partnership Agreement signed between Hungary and the European Union for 2014 to 2020. The name of the new Operational Programme for 2021-2027 will be Széchenyi Plan Plus – Economic Development and Innovation Operational Programme Plus, but it is not yet approved by the EC. However, some of the calls for proposals are already launched at the own risk of the Member State. These calls are supporting R&D Developments of enterprises and investments of frontrunner enterprises like Green National Champions, Hungarian Multinationals or the technology transition of SMEs. Besides, Hungary is currently working on the first Hungarian Cluster Strategy which can be finalized by the end of 2022 and is planned to be signed in 2022/2023. The strategy will set targets for 2030.
BUDGET 	Overall	EUR 8.8 billion in total, with no indication of how much will be dedicated to cluster organisations. (EDIOP Plus is not yet approved)
	Annual	Varies
	Source of funding	The European Union contributes 87.5% of funding through 3 funding sources (Youth Employment Initiative; European Regional Development Fund and the European Social Fund). The rest is complemented by the Hungarian government. The main financial budget for financing clusters in Hungary will be the EDIOP Plus.
POLICY EVALUATION 	Availability	ex-ante
	Results	The Hungarian cluster policy was evaluated first in 2015 by Colosseum Budapest Ltd. The study assessed the cluster development policy measures taken so far and their effectiveness and made recommendations for further developments. These recommendations served as a basis for the national call for accreditation of clusters (2016) and the call for proposals supporting the development of cluster management services (EDIOP-1.3.2-16). In 2021 The Hungarian Ministry of Finance procured a new study for the purpose of developing a new Cluster Strategy. This study was delivered by Bluefield Ltd. and provided an assessment of the current cluster situation and served as a basis for the Cluster Strategy 2030. The strategy is



		under development and planned to be adopted in 2022/2023. As soon as the Cluster Strategy will be adopted, its performance will be followed-up continuously (every year) and a halftime review of the strategy is planned for 2026.
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 Hungarian 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 a detailed overview of the categories and the scoring system.

The table below presents an overview of **the maturity assessment for Hungary** for 2022. The total score of Hungary is 3,5 points out of 8.

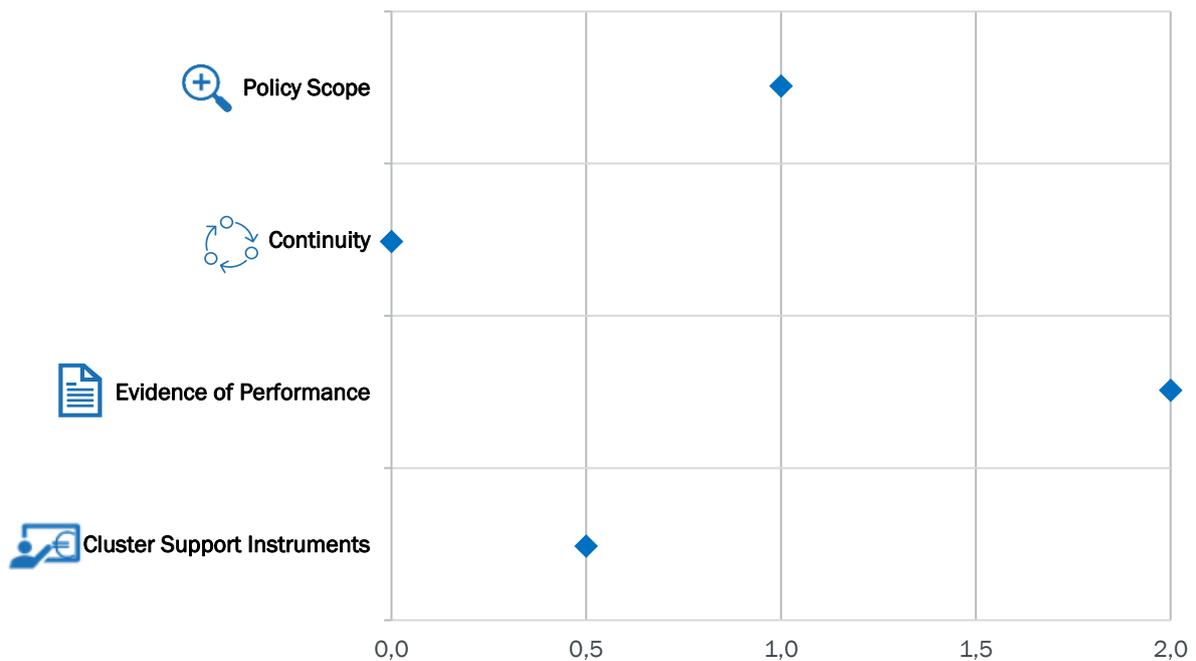
Hungary	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	1
	Sectoral policy	1	
	National and/or regional cluster policy	2	
CONTINUITY	No cluster-specific policy available	0	0
	Cluster policy established recently	0,5	
	Cluster policy established between 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)			3,5

Source: ECCP (2022)



Drawing from the table above that showcases the scored points in Hungary'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 - Hungary



Source: ECCP (2022)

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

Policy scope

The EDIOP prioritises the ICT, energy, and tourism sectors as well as R&D, which ranks as an own priority, and supports the overall infrastructure including financial instruments and the competitiveness of all SMEs. EDIOP Plus supports the overall group of all SMEs, however the cluster policy mainly supports the frontrunners of the cutting-edge emerging sectors as defined in the country's S3 Strategy.

Continuity

Broad policies that support cluster development started with a supplier target programme in 1998, followed by the Széchenyi Regional Plan in 2000, which issued a tender for the creation of clusters. The National Development Plan (2004-2006) attempted to improve cluster competitiveness by encouraging more collaboration and cooperation between multinational companies and SMEs. The New Hungarian Development Plan (2007-2013) continued to encourage cooperation between SMEs as well as internationalisation activities. There were also many regional plans developed during this time. The New Széchenyi Plan (2011-2013) started to introduce innovation supports as part of cluster



development. Finally, the Széchenyi 2020 plan focused on encouraging clusters to become accredited.

The name of the new Operational Programme for 2021-2027 will be Széchenyi Plan Plus – Economic Development and Innovation Operational Programme Plus, but it is not yet approved by the EC. However, some of the calls for proposals are already launched at the own risk of the Member State. These calls are supporting R&D Developments of enterprises and investments of frontrunner enterprises like Green National Champions, Hungarian Multis or the technology transition of SMEs and giving advantages to cluster members at the evaluation of their projects. Hungary is currently working on the first Hungarian Cluster Strategy, which can be finalized by the end of 2022 and planned to be signed in 2022-2023. The strategy will set targets for 2030. After the adoption of the Cluster Strategy a wider-range of cluster supports are planned both for CMOs and members and further non-financial tools are planned for assisting clusters in the strategy.

Evidence of performance

The New Hungarian Development Plan (2007-2013) was evaluated by the Hungarian Economic Development Centre Ltd in 2013. While this was not a policy targeting clusters, the evaluation found that there are examples of successful clusters. Interviews with cluster actors and stakeholders found that there was still a strong need to support clusters financially, especially those that already exist and/or are successful. The evaluation highlighted that should also be more encouraging of collaborative projects and accountability of cluster development and professionalisation (e.g., legal/regulatory support, evaluation of activities). The review of the cluster accreditation system in Hungary, 2015 by Colosseum Ltd. pointed out that supporting CMOs by supporting their service development would be more successful for strengthening the accredited clusters. With this limited financial support, the Hungarian cluster map has been consolidated, confirmed by the 2021 survey carried out by Bluefield Ltd.

Cluster support instruments

The EDIOP is designed to provide financial support for broad infrastructure and cross-sectoral initiatives such as to spur more SME competitiveness, stimulating R&D developments, providing broadband internet and transitioning to low carbon economy through technology retrofits. The EDIOP Plus is planned to support fostering the competitiveness of SMEs through financing their investments and R&D developments, skills and trainings for a more competitive labour force.

Cross-regional / international cooperation

Hungarian cluster organisations have been involved in 17 consortia of the European Strategic Cluster Partnerships, out of which seven partnerships were focusing on internationalisation (ESCP-4i), three partnerships were on cluster management excellence (ESCP-4x) and three partnership on thematic areas related to regional smart specialisation (ESCP-S3). Four Hungarian cluster organisations participated in the INNOSUP-1 initiative.

In the 2021-2027 funding period, the Single Market Programme supports clusters as part of the Joint Cluster Initiatives (Euroclusters) for Europe's recovery. Two clusters from Hungary are part of two Euroclusters with partners from seven countries (BE, ES, FR, GR, IT, LT, PL). They include CREATHRIV-EU and SUAVE, which cover the industrial ecosystems "Cultural & Creative Culture Industries" and "Agri-food", respectively.⁵

⁵ Assigned Euroclusters to each of the 14 industrial ecosystems is shown on: <https://clustercollaboration.eu/euroclusters> (last access 20.03.2023)

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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)