



EUROPEAN CLUSTER
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Country factsheet

Lithuania

An initiative of the European Union





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Introduction



This document presents an overview of the cluster policy in Lithuania. 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 Lithuania](#). 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 Lithuania, clusters have not acted as a partner in drafting the plan and setting the strategic priorities and were not mentioned in the National recovery and resilience plan¹. In addition to the COVID-19 pandemic, the ongoing Russian military aggression on Ukraine has also taken its toll on EU companies and industrial ecosystems, highlighting the significance of policy efforts in supporting SMEs and clusters.

The EDRF Partnership Agreement 2021-2027 in Lithuania does not make a reference to Clusters.

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

- 1) an overview of the industrial ecosystems and cluster landscape in Lithuania,
- 2) an overview of the Lithuanian broad policies which provide policy interventions for the development of clusters in Lithuania,
- 3) an assessment of the state of play of the national cluster policy.

¹ Ministry of Finance of Republic of Lithuania. 2021. Lithuanian Recovery and Resilience plan. Available at: [Ekonomikos gaivinimo ir atsparumo didinimo planas „Naujos kartos Lietuva“ \(lv.lt\)](#)

01

Industrial ecosystems and cluster landscape



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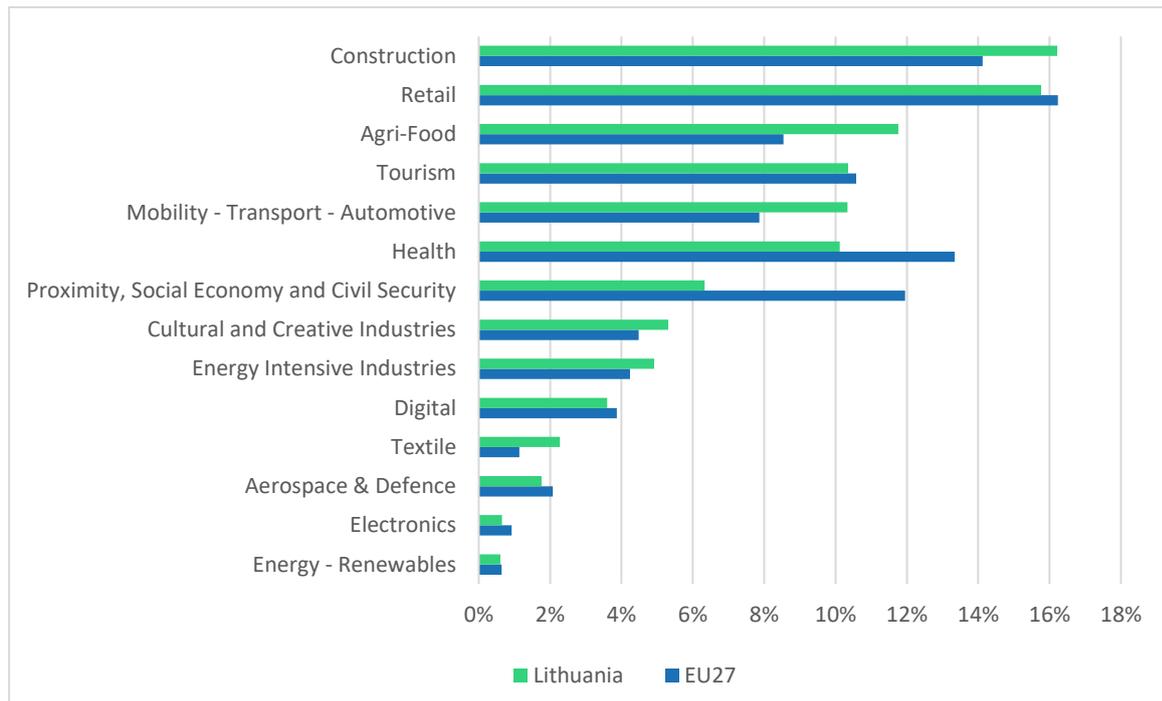
1. Industrial ecosystems and cluster landscape

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 Lithuania 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. Here, the three main ecosystems by employment for Lithuania are “Construction”, “Retail” and “Agri-Food”. Lithuania exhibits employment shares above the EU27 average in a number of ecosystems (“Construction”, “Agri-Food”, “Mobility – Transport – Automotive”, “Cultural and Creative Industries”, “Energy Intensive Industries” and “Textile”) which outlines the relative strength of Lithuania in these industrial ecosystems.

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 (agglomerations), 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 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 15 in the country, while the second table is based on the 14 ecosystems, which total 4 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
LT01: Capital Region (Lithuania)	6	C31 - Manuf. of furniture	H49-Land transport (inc. pipelines)	M73 - Advertising & market research	C16 - Manuf. of wood products	J62-Computer programming, consultancy and related activities
LT02: Central and Western Region (Lithuania)	9	C31 - Manuf. of furniture	A02 - Forestry & logging	C16 - Manuf. of wood products	C14 - Manuf. of wearing apparel	H49-Land transport (inc. pipelines)

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 (LT01), sectors manufacture of furniture and land transport are two most relevant sectoral nodes (NACE), even though they are not reflected in neither of the region's two ecosystem nodes, namely "Digital" and "Cultural and Creative Industries". Instead, the ecosystem "Digital" can be linked with the sectoral node for computer programming, consultancy and related activities (J62), while the other ecosystem node can be linked with nodes for computer programming, consultancy and related activities (J62) and advertising and market research (M73). The sectoral nodes for the Central and the Western Region (LT01) allude to a specialisation in manufacturing and agricultural sectors. These sectoral specialisation nodes are mirrored in the region's regionally relevant ecosystem nodes "Textile" and "Agri-food".

Table 2: Regionally relevant ecosystem nodes

Region	Number of nodes	Node 1	Node 2
LT01: Capital Region (Lithuania)	2	Digital	Cultural and Creative Industries
LT02: Central and Western Region (Lithuania)	2	Textile	Agri-Food

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

Cluster organisations in the regions

As of October 2022, there are 29 cluster organisations registered on the ECCP in the country. SMEs (79%, EU: 84%) followed by research organisations (12%, EU:7%) and large enterprises (9%, EU: 9%)

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).



constitute the majority of member organisations of Lithuanian cluster organisations with profiles on the ECCP. From a thematic perspective, these Lithuanian 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)
- Health (2 cluster organisations)
- Agri-food (2 cluster organisations)
- Renewable Energy (2 cluster organisations)
- Creative & Cultural Industries (2 cluster organisations)
- Mobility-Transport-Automotive (1 cluster organisation)
- Aerospace & Defence (1 cluster organisation)
- Energy Intensive Industries (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 Lithuanian cluster policies.

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 Lithuanian broad policies which addresses also the cooperation of companies, industries and R&D actors as well as the development and creation of clusters in the country. This factsheet showcases the new broad policy in Lithuania labelled as "Program for the European Union funds' investments in 2021 – 2027".

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 Lithuania.

Policy type:	Broad policy
Policy name:	Program for the European Union funds' investments in 2021–2027
POLICY OBJECTIVES 	<ul style="list-style-type: none"> Strengthening cooperation between companies or industry and RTDI actors Increasing competitiveness and boosting scale up of SMEs Supporting internationalisation activities Fostering R&D activities, technology development and implementation Fostering innovation and strengthening innovation ecosystems Promoting entrepreneurship, start-ups and spin-offs Promoting employment and upgrading skills and competences Strengthening the network of cluster organisations/cross-clustering Increase supply chains resilience <p>The Program for the EU Funds' Investments 2021-2027 plan to ensure the long-term economic and social well-being of the Lithuanian population, and strengthen the resilience of country's economy. Among other things, the Program provides support to innovation clusters, encourages cooperation between companies, research organisations and public authorities and supports the creation of business networks. The Program also focuses on supporting the participation of SMEs in</p>



Policy type:	Broad policy
Policy name:	Program for the European Union funds' investments in 2021–2027
	international research and development initiatives with the aim to strengthening business positions in international value chains, supports international networking of SMEs and their involvement in partner networks of R&D, strengthen the growth of advanced clusters based on high added value, encourages the participation on international programs in Baltic Sea Region, prepares other international R&D projects and supports participation in them. In order to increase the competitiveness of scientific and educational institutions and business enterprises, the Programme increases the involvement of SMEs and industries in R&D clusters and international value chains. Special attention and support is given to cooperation of clusters in the Baltic Sea Region. In addition, the Program strengthens the membership of clusters in international networks in order to support the involvement of exporting SMEs in international network chains and strengthen their positions in them.
POLICY FOCUS 	<p>Cross-sectoral</p> <p>The Program is not focused on a specific sector, but the goal is to strengthen the resilience and competitiveness of the entire Lithuanian economy and ensure the long-term economic and social well-being of the population.</p>
RESPONSIBLE AUTHORITIES 	<p>In charge of drafting and implementation</p> <p>Provides funding</p> <p>Oversees the implementation</p> <p>The Ministry of Finance of the Republic of Lithuania is, within the framework of the implementation of the Program, the governing authority, the control institution, the entity receiving payments from the Commission and, where applicable, the entity or entities receiving payments from the Commission in cases where technical assistance is provided. The executor of the accounting function in cases where this function is not entrusted to the management body, but to another entity, is the Central Project Management Agency.</p>
BENEFICIARIES 	<p>SMEs</p> <p>Cluster organisations</p> <p>Research organisations</p>



Policy type:	Broad policy	
Policy name:	Program for the European Union funds' investments in 2021–2027	
	<p>Academic institutions</p> <p>Start-ups</p> <p>Large firms</p> <p>NGOs</p> <p>Technology centres</p> <p>General population</p> <p>The Program targets SMEs, large companies, innovation cluster organisations, technology centers, research and innovation institutions, centers of innovation and technology transfer, innovation and technology centers of SMEs, scientific and study institutions, innovation support organisations, consulting organisations, and the general population.</p>	
INSTRUMENTS 	Financial	<p>Funding collaboration initiatives</p> <p>Support to R&D projects, SMEs becoming cluster members, etc.</p> <p>Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)</p> <p>Financing start-ups</p>
	Technical assistance	<p>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</p> <p>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</p> <p>Support for soft skills development: coaching, management training, upskilling/reskilling</p> <p>Support for networking and partnership building (at national and/or international level)</p> <p>Marketing activities: advertising, communication, events, fairs, and so on</p>



Policy type:		Broad policy
Policy name:		Program for the European Union funds' investments in 2021–2027
	Explanation	Instruments such as investments and grants are planned so that it is possible to achieve goals important for Lithuania and the Community as a whole. These support measures will be used to ensure the long-term economic and social well-being of the population, as well as to strengthen the resilience and competitiveness of the Lithuanian economy. The Program mainly provides tools such as: support for the creation of innovation clusters (which connect companies, research organisations and public authorities) and business networks; support for the development of skills needed for advanced specialization, industrial transformation, entrepreneurship and adaptation of companies to changes; support for research and innovation implementation processes; measures supporting technology transfer and cooperation between companies, research centres and universities with a focus on the low-carbon resilience of the economy, climate change and adaptation; support for digitalization of SMEs (including e-commerce, e-business and online business processes, digital innovation centres, living laboratories, internet entrepreneurs and ICT start-ups); support for SMEs business development and internationalization (including investments in production, incubation, support of young and spin-off companies and start-ups); measures to support the efficient use of energy by SMEs or large companies and demonstration projects implemented in them and support for the use of intelligent energy systems and solutions by businesses and households. The program also supports the improvement of the education system, healthcare and infrastructure in the country with financial and non-financial instruments.
HISTORY 	Period	Limited period
	Ending year <i>(for policies with limited period)</i>	2027
	Starting year	2021



Policy type:		Broad policy
Policy name:		Program for the European Union funds' investments in 2021–2027
	Explanation	The Programme is implemented for a limited time period until 2027.
BUDGET 	Overall	EUR 7.5 billion ⁵
	Annual	Not mentioned in the sources.
	Source of funding	ERDF, Cohesion fund, ESF+
POLICY EVALUATION 	Availability	no policy evaluation
	Results	No data available
POLICY ALIGNMENT WITH THE EU PRIORITIES 		Green economy Digitalisation Resilience

⁵ Ministry of Finance of Republic of Lithuania. 2022. The European Commission Approved Lithuania's Plans for EUR 7.5 billion Investments. Available at: <https://finmin.lrv.lt/en/news/the-european-commission-approved-lithuanias-plans-for-eur-7-5-billion-investments>

03

State of play of cluster policy



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3. State of play of cluster policy

This section presents an overview of the state of play of Lithuanian 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 Lithuania** for 2022. The total score of Lithuania is 1 point out of 8.

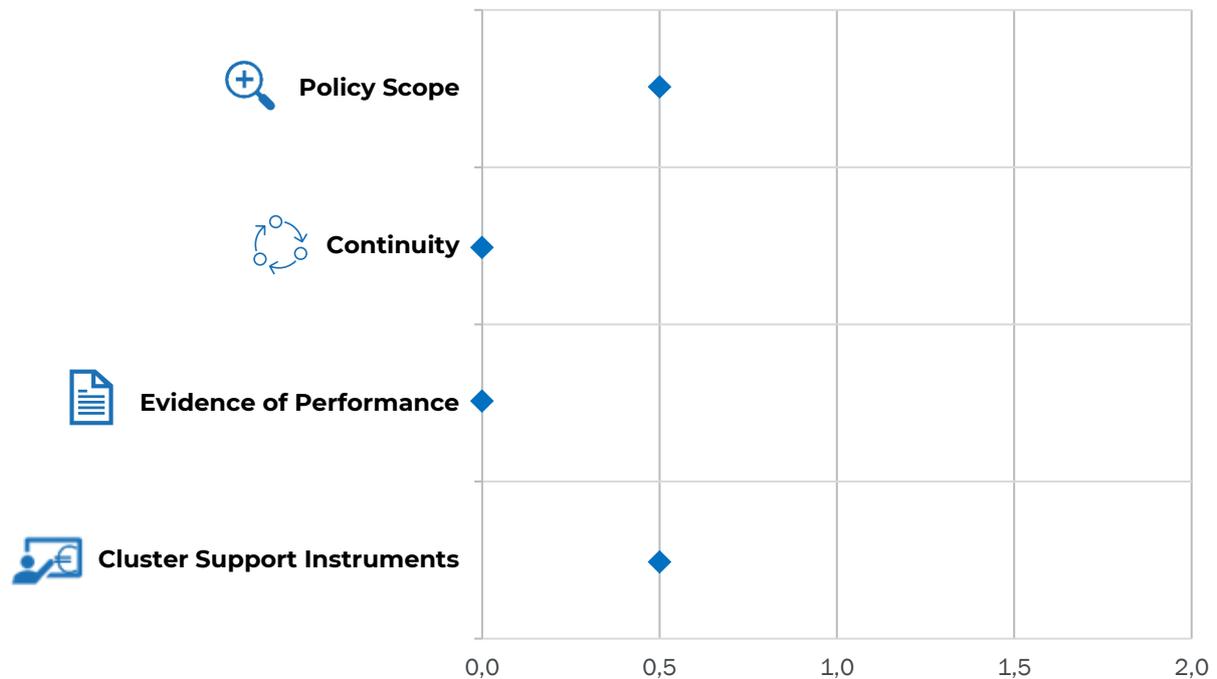
Lithuania	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	0,5
	Sectoral policy	1	
	National and/or regional cluster policy	2	
CONTINUITY	No cluster-specific policy available	0	0
	Cluster policy established recently	0,5	
	Cluster policy established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

Source: ECCP (2022)

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



Figure 2: Maturity of cluster policy - Lithuania



Source: ECCP (2022)

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

Policy scope

At the moment only broad policies and strategies provide policy interventions for the development of clusters in Lithuania. Lithuanian Innovation Development Programme and Program for the European Union funds' investments in 2021–2027 emphasise stimulation of innovation and the development of clusters, as well as their internationalisation and integration into global value chains.

Continuity

Despite the lack of a national cluster policy, Lithuania implemented several measures and broader programmes that directly fostered the creation of collaboration initiatives and strengthened existing clusters. European programmes and initiatives such as the smart specialisation (RIS3), whose main policy objectives are also addressed in the LIDP, and Horizon 2020 also strongly contributed to the development of cluster-related policies. The Ministry of Economy and Innovation adopted the [“Concept of Lithuanian Cluster Development”](#) in 2014 (revised in 2020) which is the official concept paper for the development of clusters. The Concept promotes the benefits and targets of cluster development. The expansion of clusters may be promoted through state or municipal budgets, using EU funds or other international financial assistance measures. The document also mentions the importance of a favourable business environment for the development of international world-class innovation clusters. However, it does not provide any concrete policy interventions as opposed to the LIPD which is much more precise in this regard.

Lithuanian Innovation Development Programme and Program for the European Union funds' investments in 2021–2027 are the current policies aimed at the development of clusters in Lithuania.



In addition, the national cluster policy is currently in the development stage. According to [Lithuania Cluster Network Association](#), although the national cluster policy is currently only in the development stage, it can already be stated that it will attempt to directly reflect the concept of clusters in Lithuania and the standards set for clusters not only in Lithuania but in the EU.

Evidence of performance

There is no official national evaluation of cluster-relevant policies. However, a [2016 OECD Review of Innovation Policy in Lithuania](#) refers to the “Valley Programme” which aimed in developing centres of science, studies and business. The valleys that emerged out of this programme were strongly centred around education and research institutions and lacked active involvement and interest of the business sector. The report points out that at this point a final evaluation is difficult, as high-tech valleys usually take a long time to fully develop An evaluation has also been conducted for the “Inno-vouchers LT” scheme in 2017. An overall positive impact on SMEs engagement in R&D and on cooperation between science and business was observed. However, there was no significant impact on productivity nor on competitiveness indicators.

Cluster support instruments

The Lithuanian Innovation Development Programme offers different financial and technical support instruments on the national level. Clusters directly benefit from innovation consulting services, international business networking and financial support for cooperation activities, as well as from support investment in the acquisition of innovative technologies and equipment. As part of the Program for the European Union funds' investments in 2021–2027, instruments such as investments and grants are planned to support cooperation, innovations and cluster development.

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. Lithuanian cluster organisations have been involved in thirteen consortia of the European Strategic Cluster Partnerships out of which three partnerships were focusing on internationalization (ESCP-4i), seven partnerships were on cluster management excellence (ESCP-4x) and one partnership was on smart specialization (ESCP-S3). Consortia partners came from 12 different states (PL, FI, EE, SE, AT, FR, DE, ES, DK, BG, PT, LV). Four Lithuanian cluster organisations participated in the INNOSUP-1 initiative with partner organisations coming from 18 countries (BE, UK, ES, RS, IE, LU, EE, NL, DE, EL, PL, FR, DK, AT, PT, SI, FI, SE).

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 Lithuania, three cluster organisations are part of three Euroclusters with partner from seven countries (IT, HU, GR, ES, FR, PL, BE). These three Euroclusters are CREATHRIV-EU, EPICENTRE and SUAVE. Collectively, they cover four industrial ecosystems. While CREATHRIV-EU operates in the “Cultural and Creative Industries” and SUAVE in the “Agri-food” ecosystem, EPICENTRE covers the industrial ecosystems “Digital”, “Agri-food” and “Health”.

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

Source: ECCP (2022)