



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Canada

An initiative of the European Union





Contents

1. Introduction and economic policy context	4
2. National cluster policy, programmes and initiatives	6
3. State of cluster policy	16
References	20
Annex.....	22

01

Introduction and economic policy context



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



1. Introduction and economic policy context



This document presents an overview of the cluster policy in Canada. Given the importance to contextualise the analysis of cluster policies (and related), a comprehensive outlook of the country in socioeconomic terms can be consulted in the OECD [Economic Survey](#) report for Canada from March 2023. The Economic Survey presents the major challenges faced by the country, evaluates the short-term outlook, and makes specific

policy recommendations.

The COVID-19 pandemic caused an unprecedented economic shock to the Canadian and global economy. In the face of a global pandemic, the Canadian recovery plan was guided by a [report](#) from the Industry Strategy Council named “Restart, recover, and reimagine prosperity for all Canadians – An ambitious growth plan for building a digital, sustainable and innovative economy”. The report presented a comprehensive industrial strategy and assigned clusters an explicit role in the economic recovery from the pandemic. In turn, Canada's clusters rose to the challenge of COVID-19 by supporting [82 projects](#) to support the country's efforts to contain the pandemic and help the Canadian economy recover.

The ongoing Russian military aggression against Ukraine and the ensuing international market disruptions reaffirm the importance of cluster development in order to strengthen Canada's economic resilience. At the same time, the crisis presents opportunities for Canada's raw materials and energy sectors as European countries are looking to [replace](#) their imports from Russia. A recent [ECCP input paper](#) looks at collaboration opportunities between the European Union's and Canada's cluster landscapes.

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

- 1) an overview of the national cluster policy and an insight into a regional cluster policy,
- 2) an assessment of the state of play of the national cluster policy.

02

National cluster policy, programmes and initiatives



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Strengthening the European economy through collaboration




2. National cluster policy, programmes and initiatives

In this section, we provide an overview of the existing Canadian cluster policies on a national level as well as an example of regional level cluster policy.

The overview is presented in the form of a table, with the first column outlining information on the aspects which constitute the policy (beginning with 'Policy Objectives', followed by 'Policy Focus', etc.). The second column provides a snapshot of Canada's national cluster policy, the Global Innovation Clusters programme. The third column showcases an example of regional cluster policy in Canada for the province of Québec, the Zones d'innovation initiative. To gain an insight into the Strategic Clusters programme¹ and the ACCORD programme² (discontinued in 2023), also in Québec, that were outlined in the previous factsheets of 2021 and 2022 respectively, please follow this link: [ECCP Country Factsheets](#).

Within the table, the text presented in bold (black) depicts standardised categories across country factsheets (56 in total for 2023), which are applied for comparative purposes. This is followed by a complementary descriptive text to provide more insights about cluster policy in Canada.

Table 1: Overview of Canadian cluster policy

Policy type:	National cluster policy	Regional cluster policy
Policy name:	Global Innovation Clusters	Zones d'innovation (Québec)
POLICY OBJECTIVES 	Strengthening cooperation between companies or industry and RTDI actors Increasing competitiveness and boosting scale up of SMEs Supporting internationalisation activities Enhancing the visibility of clusters Fostering R&D activities, technology development and implementation Fostering innovation and strengthening innovation ecosystems	Strengthening cooperation between companies or industry and RTDI actors Increasing competitiveness and boosting scale up of SMEs Supporting internationalisation activities Enhancing the visibility of clusters Fostering R&D activities, technology development and implementation Fostering innovation and strengthening innovation ecosystems

¹ See <https://frq.gouv.qc.ca/en/program/strategic-cluster-rq-2024-2025/> (accessed 20.04.2023).

² See <https://prod5.assets-cdn.io/event/6854/assets/8366911421-2f3aff06b4.pdf> (accessed 25.01.2024).





Policy type:	National cluster policy	Regional cluster policy
Policy name:	Global Innovation Clusters	Zones d'innovation (Québec)
	<p>Supporting cluster excellence and professionalisation of cluster management</p> <p>Supporting the creation of new cluster organisations</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>Strengthening the network of cluster organisations/cross-clustering</p> <p>Cluster analysis and support for policymaking</p> <p>Increase supply chain resilience</p> <p>Canada's federal Global Innovation Clusters (GIC), recapitalised in 2022, represents a rebranding and continuation of the previous Innovation Superclusters Initiative.</p> <p>The Innovation Superclusters Initiative (ISI) was announced in the federal government's budget plan in 2017 as a co-investment initiative intended to create "superclusters" to foster innovation ecosystems and accelerate economic growth in industries with high innovation potential by incentivising large-scale collaboration among industry leaders, SMEs and post-secondary institutions. In 2018, after a competitive selection process, the five successful superclusters were announced by the Department of Innovation, Science and Economic Development (ISED):</p> <ul style="list-style-type: none"> • Ocean Supercluster • Scale AI 	<p>Supporting the creation of new cluster organisations</p> <p>Promoting employment and upgrading skills and competences</p> <p>Enhancing territorial cohesion (through RIS3)</p> <p>Québec's zones d'innovation (innovation districts) initiative aims for the creation of internationally competitive innovation clusters in order to increase the commercialization of innovations, exports, firm productivity and domestic as well as foreign investment. Further goals are to hold and attract talent and to improve the socioeconomic performance of regions.</p> <p>A zone d'innovation is characterized by its larger size, strategic importance, and defined geography as compared to the créneaux, poles d'excellence or clusters supported by ACCORD.</p>



Policy type:	National cluster policy	Regional cluster policy
Policy name:	Global Innovation Clusters	Zones d'innovation (Québec)
	<ul style="list-style-type: none"> • Advanced Manufacturing Canada • Protein Industries Canada • Digital Technology Supercluster <p>The clusters build on existing sectoral strengths and aim to establish long-term competitive advantages, global brand recognition as well as a significant impact on job creation and economic growth.</p> <p>Each cluster is expected to foster the collaboration of large firms and SMEs, research, government and not-for-profit actors within a defined economic realm.</p> <p>The recapitalisation of the programme is focused on</p> <ul style="list-style-type: none"> • growing each cluster's innovation ecosystem, • strengthening networks between the private sector, academia, and governments in ways that promote investment in innovation and commercialisation, • expanding national and global presence, • collaborating to deepen impact, including through joint missions aligned with key government priorities such as fighting climate change and addressing supply chain disruptions, • acting as a catalyst for skills and talent development, • and continuing to support the growth and scale-up of Canadian SMEs 	
	No specific focus	No specific focus



Policy type:	National cluster policy	Regional cluster policy
Policy name:	Global Innovation Clusters	Zones d'innovation (Québec)
POLICY FOCUS 	<p>The GIC programme is cross-sectoral in nature and focuses on five strategic areas determined through an initial competitive selection process: plant-based protein alternatives; ocean-based industries; advanced manufacturing; digital technologies; and artificial intelligence. Each cluster, in turn, connects several sectors, e.g. the Digital Technology Supercluster supports applied digital solutions in its three focus areas: health, natural resources, and training.</p>	<p>The zones d'innovation do not have a specific sectoral focus. Each zone, however, is focused on a specific future technological area, often linking different sectors, where Québec has a (potential) comparative advantage.</p> <p>The first two innovation districts, respectively on microelectronics in Bromont and quantum technology in Sherbrooke, were announced in February 2022, with a total contribution of CAD 690 million over five years, by the Government of Québec. More clusters are expected to be established in the near future.</p>
RESPONSIBLE  AUTHORITIES	<p>In charge of drafting</p> <p>Provides funding</p> <p>Oversees the implementation</p> <p>The ISI was launched by the Canadian government's Department of Innovation, Science and Economic Development Canada (ISED) in 2017 as part of the Innovation and Skills Plan, in order to generate growth and help Canada achieve its potential as global leader in innovation. The clusters are set up as independent industry-led organisations that leverage additional funding from the private sector and other levels of government. So, while the government/ISED were instrumental in designing programme parameters, conducting a competitive selection process, providing initial funding, and ensuring ongoing support and oversight, the industry-led cluster organisations are implementing the policy. Also, funding from the government must be at least matched by private funds from industry.</p>	<p>In charge of drafting</p> <p>In charge of implementation</p> <p>Provides funding</p> <p>Oversees the implementation</p> <p>Québec's department of Economy, Innovation and Energy is currently reviewing applications for the establishment of zones d'innovation.</p> <p>The initiative is financed from the provincial government budget of Québec.</p>



Policy type:		National cluster policy	Regional cluster policy
Policy name:		Global Innovation Clusters	Zones d'innovation (Québec)
BENEFICIARIES 		SMEs Cluster organisations Research organisations Academic institutions Start-ups Business associations Large firms NGOs Technology centres General population	SMEs Cluster organisations Research organisations Academic institutions Start-ups Business associations Large firms Technology centres General population Other: Municipalities
INSTRUMENTS 		Financial Funding collaboration initiatives Support to R&D projects, SMEs becoming cluster members, etc. Subsidies for cluster infrastructure (e.g. offices, equipment)	Funding collaboration initiatives Support to R&D projects, SMEs becoming cluster members, etc. Subsidies to hire personnel



Policy type:		National cluster policy	Regional cluster policy
Policy name:		Global Innovation Clusters	Zones d'innovation (Québec)
		Financing networking events Innovation: voucher, support to hire PhDs, cooperation with R&I actors	Subsidies for cluster infrastructure (e.g. offices, equipment) Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects) Financing start-ups Innovation: voucher, support to hire PhDs, cooperation with R&I actors
	Technical assistance	Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc. Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence 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	Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc. Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence 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>The ISI and GIC allocate non-repayable contributions to the industry-led consortia. The contributions must be at least matched by private sector investment. The concrete choice of instruments depends on the cluster. The categories listed above represent a representative set of instruments found across the different clusters.</p> <p>The clusters in general are focused on supporting collaboration among firms, large and small, and between them and research institutions like universities and colleges. Technical assistance is</p>	<p>The zones d'innovation initiative prescribes only a broad framework of instruments. The final selection and implementation is up to the managing authorities of the zones d'innovation themselves. The categories listed above represent a representative set of instruments found across the existing zones d'innovation.</p>




Policy type:		National cluster policy	Regional cluster policy
Policy name:		Global Innovation Clusters	Zones d'innovation (Québec)
		broadly provided on key topics, including infrastructure, IP management, management skills, networking and marketing activities.	
HISTORY 	Period	Limited period	Limited period
	Ending year (for policies with limited period)	2028	2027
	Starting year	Announced: 2017 Competitive selection process and launch: 2018 Recapitalisation and rebranding: 2022	2019
	Explanation	The GIC programme has secured authorisation to operate for a period of ten years, from 2018 to 2028. The original ISI was funded for an initial period of five years, announced in 2017 and launched in 2018 through 2023. A reinvestment and rebranding of the programme added an additional five years of funding through 2028.	Initiated in 2019, the zones d'innovation programme's funding period is currently aligned with the innovation strategy of Québec 2022-2027.



Policy type:		National cluster policy	Regional cluster policy
Policy name:		Global Innovation Clusters	Zones d'innovation (Québec)
BUDGET 	Overall	Total: CAD 1.7 billion (EUR 1.2 billion) over 10 years ISI phase: CAD 950 million (EUR 663 million) for initial five years GIC phase: CAD 750 million (EUR 523 million) reinvestment through 2028	The government announced a total contribution of CAD 690 million over five years for the two confirmed zones d'innovation.
	Annual	-	The government of Québec allocated CAD 20 million (EUR 14 million) to support the program In Budget 2020-21, CAD 190 million (EUR 133 million) in 2021-2022 (fiscal update in November) and CAD 100 million (EUR 70 million) in 2022-2023.
	Source of funding	Government of Canada's budget, at least matched by private funds. The GIC came with a reinvestment of CAD 750 million (EUR 523 million ³) for the period of 2023 to 2028 adding to the original ISI budget of CAD 950 million (EUR 663 million) for the 2018-2023 phase and totalling CAD 1.7 billion (EUR 1.2 billion) combined. The GIC rebranding of the cluster initiative provides new funding which is to be allocated on a competitive basis between the five existing clusters.	The Government of Quebec funds the Zones d'innovation programme.
POLICY EVALUATION	Availability	in-itinere	no policy evaluation
	Results	An internal audit of the programme was published in May 2023 and an official programme evaluation was completed in March 2022, both by ISED. An economic analysis was conducted by EY in 2021 and published in 2022. Additionally, each cluster publishes an annual report on its activities and outcomes.	There is no evaluation for the programme yet. On the project level, each zone d'innovation has to provide an evaluation framework for future evaluations.

³ All sums converted at the InforEuro exchange rate of March 2023, see https://ec.europa.eu/info/funding-tenders/procedures-guidelines-tenders/information-contractors-and-beneficiaries/exchange-rate-inforeuro_en (accessed 23.03.2023).



Policy type:	National cluster policy	Regional cluster policy
Policy name:	Global Innovation Clusters	Zones d'innovation (Québec)
POLICY ALIGNMENT WITH THE EU PRIORITIES 	Green economy Digitalisation Resilience	Green economy Digitalisation Resilience



03

State of cluster policy



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



3. State of cluster policy

This section presents an overview on the state of play of Canadian cluster policy in the form of a qualitative assessment across four categories of analysis – policy scope, continuity of cluster policies, evidence of performance, and the range of cluster support instruments. Please refer to the **Annex** for the detailed overview of the categories. The table below presents an overview of the **state of play of Canadian cluster policy** for 2023.

Table 2: State of play

Canada	State of play
POLICY SCOPE	Absence of cluster policy
	Broad policy
	Sectoral policy
	National and/or regional cluster policy
CONTINUITY	No cluster-specific policy available
	Cluster policy established recently
	Cluster policy established between over 2 and 10 years
	Cluster policy established over 10 years ago
EVIDENCE OF PERFORMANCE	No evaluation and / or monitoring available
	Existence of evaluations of past policies
	Existence of monitoring or an ongoing / interim evaluation
	Existence of monitoring and ex-ante or ongoing / interim evaluation
CLUSTER SUPPORT INSTRUMENTS	No instruments for cluster development
	Financial support for cluster development in the broader and / or sectoral policy
	Financial or technical support for cluster development in dedicated cluster policy
	Financial and technical support for cluster development in dedicated cluster policy

Source: ECCP (2023)

The text below provides a **qualitative description** of the state of play of the cluster policy in Canada.

Policy scope

In Canada, the primary cluster policy programme on the national level is the Global Innovation Clusters programme. The GIC supports five country-wide clusters in different thematic fields that were selected through a competitive process.

Additionally, there are further policies and programmes on the national and regional level to promote cluster development as detailed in the following paragraphs.

Continuity



Canada has been implementing cluster policy for over 10 years and with clear continuity.

At the national level, Canadian cluster policy has been strongly influenced by several foundational programmes, such as the Networks of Centres of Excellence programme (1989 through 2024), the Centres of Excellence for Commercialisation and Research (CECR) programme (2008 through 2024), and the Business-Led Networks of Centres of Excellence programme (2009 through 2024). These programmes focused on stimulating collaborative work between the academic, the private and the public sectors to strengthen Canada's ecosystems in specific areas.

In 2017 the Innovation and Skills Plan created the Innovation Superclusters Initiative (now Global Innovation Clusters), which supports five large-scale clusters in areas where Canada has a global advantage. The Innovation and Skills Plan also announced the Strategic Innovation Fund (SIF), which has supported networks that develop and foster national collaborations between the private, not-for-profit, and academic sectors.

Finally, the Government of Canada also has seven Regional Development Agencies across the country that play an important role in growing regional clusters in priority sectors.

National cluster policy is also supplemented by initiatives at the provincial/territorial level. In Québec, for example, the province pioneered an approach to support innovation cluster competitiveness in 1980. Over time, Québec identified 13 clusters of which five received strategic investment (aerospace, pharmaceuticals, IT, metal and mineral refinery, and hydroelectric production and transmission). Since then cluster policy has continued to evolve and develop through programmes like ACCORD and the zones d'innovation.

Evidence of performance

In order to judge the effectiveness of the Global Innovation Clusters programme, several assessment reports are available. An early 2020 report by the Parliamentary Budget Office⁴ criticised the delayed rollout of the programme and stated that the programme did not have in place a well-developed results framework.

By contrast, later reports confirm the programme to be (back) on track. An official economic analysis commissioned by ISED and conducted by EY in 2021⁵ reports the programme and the Clusters to be largely on track to meet stated targets. It also provides insights into how project partners perceive the benefits of the programme based on interviews.

ISED also completed a programme evaluation⁶ in March 2022, covering the period up to September 30, 2021. The evaluation shows that the GIC programme has been gaining traction, and also provided recommendations on points for further improvement. On the one hand, it shows that the roll-out varied by a large degree between the clusters, with Scale AI and Ocean only having used 14 and 22 per cent of their available project funds as of March 2021, contrasting with NGen and Digital's 42 and 65 per cent. Also, it recognises the need to enhance the measurement of programme outcomes. On the other hand, the evaluation shows that the programme is delivering on its promises as each cluster had surpassed the goal of matching public and industry funds, with Scale AI reaching even a 2:1 ratio of industry to public funds in July 2021. Crucially, the programme is reported to have fostered collaborations between private, public, academic, and not-for-profit actors while supporting projects

⁴ Bergeron, E.; Ahmed, S. M. (2020): The Innovation Superclusters Initiative – A preliminary analysis. Office of the Parliamentary Budget Officer. Available under: https://www.pbo-dpb.gc.ca/web/default/files/Documents/Reports/RP-2021-024-S/RP-2021-024-S_en.pdf (last access 23.03.2023).

⁵ EY (2022). Innovation Superclusters Initiative: Economic Analysis. Final Report. March 2022. Available under: <https://ised-isde.canada.ca/site/global-innovation-clusters/sites/default/files/documents/2022-06/isi-exec-summ-2022-eng.pdf> (last access 21.03.2023).

⁶ ISED (2022). Evaluation of Innovation, Science and Economic Development (ISED) Canada's Innovation Superclusters Initiative. Audit and Evaluation Branch. <https://ised-isde.canada.ca/site/audits-evaluations/en/evaluation-innovation-science-and-economic-development-ised-canadas-innovation-superclusters> (last access 25.04.2023).



to develop and advance technologies and address ecosystem gaps. On top of that, it was flexible enough to take on new challenges when the Covid-19 pandemic hit.

In March 2022, the programme was renewed for a second phase to support the further growth and development of the Clusters. Most recently, an internal programme audit⁷ was published in May 2023, which examined whether appropriate processes, activities, and controls are in place to ensure strong programme oversight. The audit found that effective programme management systems are largely in place, and provided recommendations to strengthen certain risk management and monitoring tools.

Alongside these programme-level evaluations, each cluster publishes an annual report⁸ on its activities and outcomes, providing insights on a range of performance indicators.

Cluster support instruments

A wide variety of support is provided through the five clusters. The GIC provides funding to the individual industry-led cluster organisations, which then determine their own range of financial and technical assistance instruments.

Cross-regional / international cooperation

In 2019, ISED and the DG GROW of the European Commission established an Administrative Agreement on Cluster Cooperation⁹ with the goal to “facilitate linkages between cluster representatives and policy-makers” and “exchange best practices in fields of mutual interest”.

⁷ ISED (2023). Audit of Innovation, Science and Economic Development (ISED) Canada’s Innovation Superclusters Initiative. Audit and Evaluation Branch. <https://ised-isde.canada.ca/site/audits-evaluations/en/internal-audit/internal-audit-reports-fiscal-year/audit-innovation-supercluster-initiative> (last access 17.05.2023).

⁸ The 2021/2022 annual reports can be consulted under: [Digital Supercluster](#), [ScaleAI](#), [Ocean Supercluster](#), [Protein Industries Canada](#), [NextGen Manufacturing](#) (last access 23.03.2023).

⁹ ISED; DG GROW (2019). Administrative Arrangement on Cluster Cooperation. https://clustercollaboration.eu/sites/default/files/administrative_arrangement_can-eu_clusters_signed.pdf (last access 14.10.2022).

References



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



References

Beaudry, C.; Solar-Pelletier, L. (2020). The Superclusters Initiative: An Opportunity to Reinforce Innovation Ecosystems. Institute for Research on Public Policy (IRPP). October 8, 2020. <https://irpp.org/research-studies/the-superclusters-initiative-an-opportunity-to-reinforce-innovation-ecosystems/> (last access 24.03.2023).

Bergeron, E.; Ahmed, S. M. (2020): The Innovation Superclusters Initiative – A preliminary analysis. Office of the Parliamentary Budget Officer. Available under: https://www.pbo-dpb.gc.ca/web/default/files/Documents/Reports/RP-2021-024-S/RP-2021-024-S_en.pdf (last access 23.03.2023).

EOCIC (2019). Cluster programmes in Europe and beyond. https://www.clustercollaboration.eu/sites/default/files/news_attachment/cluster_programmes_in_europe_and_beyond_0.pdf (last access 14.10.2022).

EY (2022). Innovation Superclusters Initiative: Economic Analysis. Final Report. March 2022. <https://ised-isde.canada.ca/site/global-innovation-clusters/sites/default/files/documents/2022-06/isi-exec-summ-2022-eng.pdf> (last access 21.03.2023).

Government of Canada (2017). Innovation and Skills Plan. In: Budget 2017. <https://www.budget.canada.ca/2017/docs/plan/chap-01-en.html> (last access 25.04.2023).

Government of Canada (2022). Chapter 2.2: Supporting Economic Growth and Stable Supply Chains. In: Budget 2022. <https://budget.gc.ca/2022/report-rapport/chap2-en.html#2022-2> (last access 14.10.2022).

Institute for Competitiveness & Prosperity (2019). The Canadian Cluster Handbook. https://clusterexcellencedenmark.dk/wp-content/uploads/2021/06/WP34_The-Canadian-Cluster-Handbook.pdf (last access 14.10.2022).

ISED. Cluster Map of Canada. <https://www.clustermapping.ca/app/scr/is/ccmp/web#!/en/home> (last access 14.10.2022).

ISED (2017). Innovation Superclusters. Program Guide. https://publications.gc.ca/collections/collection_2017/ised-ised/lu4-214-1-2017-eng.pdf (last access 14.10.2022).

ISED (2021). Canada's Supercluster projects: COVID-19 response. <https://www.ic.gc.ca/eic/site/093.nsf/eng/00021.html> (last access 14.10.2022).

ISED (2022). Evaluation of Innovation, Science and Economic Development (ISED) Canada's Innovation Superclusters Initiative. Audit and Evaluation Branch. <https://ised-isde.canada.ca/site/audits-evaluations/en/evaluation-innovation-science-and-economic-development-ised-canadas-innovation-superclusters> (last access 25.04.2023).

ISED (2022). Global Innovation Clusters. <https://ised-isde.canada.ca/site/global-innovation-clusters/en> (last access 14.10.2022).

ISED (2023). Audit of Innovation, Science and Economic Development (ISED) Canada's Innovation Superclusters Initiative. Audit and Evaluation Branch. <https://ised-isde.canada.ca/site/audits-evaluations/en/internal-audit/internal-audit-reports-fiscal-year/audit-innovation-supercluster-initiative> (last access 22.05.2023).



ISED; DG GROW (2019). Administrative Arrangement on Cluster Cooperation. https://clustercollaboration.eu/sites/default/files/administrative_arrangement_can-eu_clusters_signed.pdf (last access 14.10.2022).

Knubley, J. (2021). Building Superclusters for Canada. Brookfield Institute for Innovation and Entrepreneurship. April 2021. https://brookfieldinstitute.ca/wp-content/uploads/Superclusters_Final2.pdf (last access 23.03.2023).

Ministère de l'Économie et de l'Innovation de Québec. Zones d'Innovation initiative.

- Création de zones d'innovation.
<https://www.economie.gouv.qc.ca/bibliotheques/zones-dinnovation/creation-de-zones-dinnovation> (last access 25.04.2023).
- Guide de presentation d'un projet de zone d'innovation.
https://www.economie.gouv.qc.ca/fileadmin/contenu/documents_soutien/zones_innovation/guide_projet_zones_innovation.pdf (last access 25.04.2023).
- Stratégie Québécoise de recherche et d'investissement en innovation 2022-2027.
https://cdn-contenu.quebec.ca/cdn-contenu/adm/min/economie/publications-adm/politique/PO_SORI2_2022-2027_MEI.pdf (last access 25.04.2023).

Munro, D.; Ornston, D.; Wolfe, D. A. (2022). Breaking Canada's innovation inertia. Policy Options. May 25, 2022. <https://policyoptions.irpp.org/magazines/may-2022/breaking-canadas-innovation-inertia/> (last access 14.10.2022).

National Research Council Canada (2009). Portfolio Evaluation of the NRC Technology Cluster Initiatives. <http://archives.enap.ca/bibliotheques/2012/10/030315425.pdf> (last access 14.10.2022).

Spencer, G. M. (2014). Cluster Atlas of Canada. https://clustercollaboration.eu/sites/default/files/international_cooperation/cluster-atlas.pdf (last access 14.10.2022).



Annex

Table 3: Analytical framework for state of cluster policy

Criterion	Description	Categorical variables
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 existence of broader policies existence of specific sectoral policies existence of targeted cluster policies
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 cluster policy established recently (within the last 2 years) cluster policy established between over 2 and 10 years cluster policy established over 10 years ago
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 existence of evaluations of past policies, e.g. ex-ante existence of monitoring or an ongoing / interim evaluation existence of monitoring and ex-ante or ongoing / interim evaluation
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 financial support for cluster development in the broader and / or sectoral policy financial or technical support for cluster development in dedicated cluster policy financial and technical support for cluster development in dedicated cluster policy

Source: ECCP (2023)