



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

# Country factsheet

Sweden

An initiative of the European Union





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## Introduction



This document presents an overview of the cluster policy in Sweden. Given its importance to contextualise the cluster policies (and related) analysed in the factsheets, a comprehensive outlook of the country in socioeconomic terms can be consulted in the [European Semester Country Report Sweden 2020](#).

The European Semester was an instrument introduced to coordinate the EU Member States economic policies and address the economic challenges faced by the EU. Its goals are “to ensure sound public finances, to prevent excessive macroeconomic imbalances in the EU, to support structural reforms to create more jobs and growth, and to boost investment”. Thus, it focuses on the following areas: business environment; financial and fiscal stability; green economy; public administration; labour market and skills; and, social protection and cohesion.

The COVID-19 pandemic has caused an unprecedented economic shock to the European and global economy. In response, policymakers at EU and national level have acted decisively and at short notice to make available very significant financial resources, notably through the Recovery and Resilience Facility, to tackle the threat of a prolonged downturn. [National recovery and resilience plans](#) have been drafted in each Member State to ensure a recovery that addresses the challenges identified in the European Semester. In Sweden, Research and innovation are crucial to Sweden’s competitiveness and to rebooting the economy after the COVID-19 pandemic. Although clusters are not directly mentioned in the National recovery and resilience plan, the Swedish Government increased the funding for the autumn budget 2020 of EUR 65.34 million to Vinnova<sup>1</sup>, Research Institutes of Sweden (RISE)<sup>2</sup> and Business Sweden<sup>3</sup> to support measures that help reboot Sweden thought clusters<sup>4</sup>.

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<sup>1</sup> Vinnova is Sweden’s innovation agency.

<sup>2</sup> RISE is Sweden’s research institute and innovation partner. Through collaboration with industry, academia and the public sector, RISE ensures business competitiveness and contribute to a sustainable society. <https://www.ri.se/en/about-rise/about-rise>

<sup>3</sup> Business Sweden is jointly owned by the Swedish state and the Swedish business sector with a mandate and a mission to help international companies gain access to the Swedish market and help domestic ones utilize it as a platform for expansion.

<sup>4</sup> <https://www.government.se/press-releases/2020/09/competitiveness-and-reboot-for-research-innovation-and-investments/>

01

# Industrial ecosystems and cluster landscape



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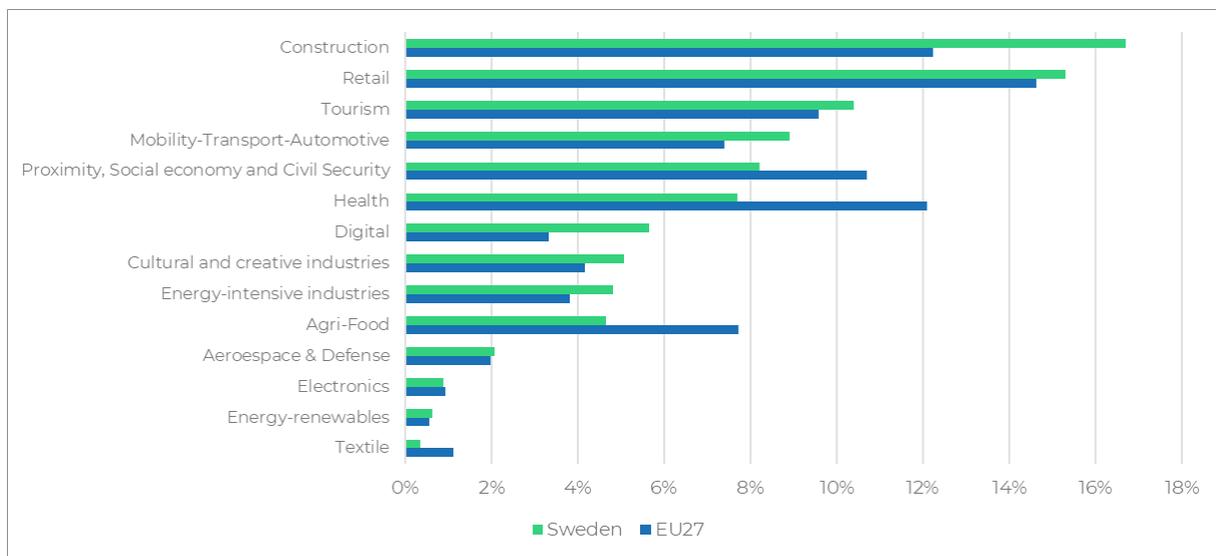


# 1. Industrial ecosystems and cluster landscape

## 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. The following graph 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.

**Graph 1: Employment in the ecosystems**



Source: Own elaboration from Eurostat and National Statistical Offices



## Regionally relevant nodes

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. The following tables show 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 81 in the country, while the second table is based on the 14 ecosystems, which total 10 in the country.

**Table 1: Regionally relevant sectoral nodes**

Region	Number of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
<b>SE11: Stockholm</b>	9	M70 - Head offices, management consult.	J58 - Publishing activities	J62 - Computer programming, consultancy	J61 - Telecommunications	M73 - Advertising & market research
<b>SE12: East-Central Sweden</b>	12	C24 - Manuf. of basic metals	C30 - Manuf. of other transport equipment	C28 - Manuf. of machinery & equipment	L68 - Real estate	F43 - Specialised construction act.
<b>SE21: Småland and islands</b>	11	C16 - Manuf. of wood products	C17 - Manuf. of paper products	A02 - Forestry & logging	C28 - Manuf. of machinery & equipment	C25 - Manuf. of fabricated metal products
<b>SE22: South Sweden</b>	7	M72 - Scientific research & development	M74 - Other prof., scientific, techn. act.	M70 - Head offices, management consult.	L68 - Real estate	J62 - Computer programming, consultancy
<b>SE23: West Sweden</b>	7	C29 - Manuf. of motor vehicles & trailers	M71 - Architecture, engineering	M70 - Head offices, management consult.	L68 - Real estate	J62 - Computer programming, consultancy
<b>SE31: North-Central Sweden</b>	10	C24 - Manuf. of basic metals	C17 - Manuf. of paper products	A02 - Forestry & logging	C16 - Manuf. of wood products	C25 - Manuf. of fabricated metal products
<b>SE32: Central Norrland</b>	13	C17 - Manuf. of paper products	A02 - Forestry & logging	C16 - Manuf. of wood products	K65 - Insurance, pension funding	J61 - Telecommunications
<b>SE33: Upper Norrland</b>	12	B07 - Mining of metal ores	C16 - Manuf. of wood products	C24 - Manuf. of basic metals	A02 - Forestry & logging	F42 - Civil engineering

Source: Own elaboration from Eurostat and National Statistical Offices

**Table 2: Regionally relevant ecosystem nodes**

Region	Number of nodes	Node 1	Node 2
<b>SE11: Stockholm</b>	2	Digital	Cultural and creative industries
<b>SE12: East-Central Sweden</b>	0	-	-
<b>SE21: Småland and islands</b>	1	Energy-intensive industries	-
<b>SE22: South Sweden</b>	1	Digital	-
<b>SE23: West Sweden</b>	2	Mobility-Transport-Automotive	Digital
<b>SE31: North-Central Sweden</b>	1	Energy-intensive industries	-
<b>SE32: Central Norrland</b>	1	Energy-intensive industries	-
<b>SE33: Upper Norrland</b>	2	Energy-intensive industries	Construction

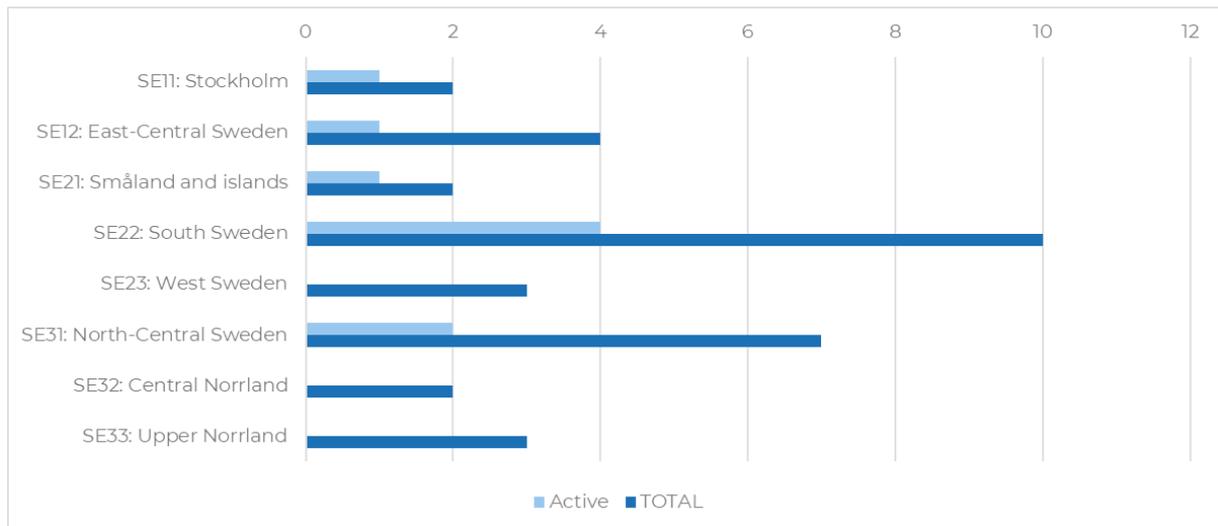
Source: Own elaboration from Eurostat and National Statistical Offices



## Cluster organisations in the regions

There are 33 cluster organisations registered on the ECCP in the country, 9 of which can be considered active on the ECCP, having updated their profiles during the first half of 2021. The following graph shows the presence of cluster organisations in the different regions.

**Graph 2: Cluster organisations profiled and active on the ECCP**



Source: Own elaboration from Eurostat and National Statistical Offices

02

## National cluster policy, programmes and initiatives



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## 2. National cluster policy, programmes and initiatives

Policy type:	Broad policy	Regional cluster policy
Policy name:	National strategy for sustainable regional development throughout the country 2021–2030 RIS3, smart specialisation strategy	Skåne Regional Cluster Development Programme 2017–2021
POLICY OBJECTIVES 	<p><b>Strengthening cooperation between companies or industry and RTDI actors</b></p> <p><b>Increasing competitiveness and boosting scale up of SMEs</b></p> <p><b>Fostering R&amp;D activities, technology development and implementation</b></p> <p><b>Supporting cluster excellence and professionalisation of cluster management</b></p> <p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Supporting the consolidation of existing cluster organisations</b></p> <p><b>Promoting social and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Enhancing territorial cohesion</b></p> <p>A Strengthen innovation capacity is among the strategic areas and priorities for 2021– 2030, especially SMEs and between the private sector and R&amp;I actors in general. The National strategy has prioritized innovation &amp; entrepreneurship, attractive environments and accessibility, provision &amp; skills and international cooperation. The strategy is focused on giving the</p>	<p><b>Strengthening cooperation between companies or industry and RTDI actors</b></p> <p><b>Fostering R&amp;D activities, technology development and implementation</b></p> <p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Promoting social and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Supporting cluster excellence and professionalisation of cluster management</b></p> <p><b>Supporting the consolidation of existing cluster organisations</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p> <p>The objective of the Regional Cluster Development Programme is to reach cluster excellence, hereunder that a minimum of 5 cluster organisations in Skåne to achieve the Gold Label, the remaining cluster organisations to achieve the Silver Label.</p> <p>The cluster organisations shall also contribute to a minimum of 1–3 new growth areas, and have focus on sustainable production, as well</p>



regions the opportunity to grow and develop based on their own specific regional conditions. This requires efforts and collaboration in a variety of sectors and at all levels of society. In coherent to the National Strategy several of Sweden's 21 regions have taken a proactive and strategic role in supporting triple helix collaboration to strengthen international competitiveness. Some regions as region of Skåne for instant launched a regional cluster program in 2015. The national initiatives for cluster development are as well based in smart specialization (RIS3). The S3 Cluster Pilot started in 2018 and is one tool to execute smart specialisation by strengthen regional prioritized cluster initiatives and their work with companies. The aim is to professionalize those clusters with a strong emphasis on promoting enterprises' development and competitiveness.

The Vinnväxt-program (the national agency for innovation, Vinnova) is also consistent with EU's innovation policy and Smart Specialisation. Since the program started (2001) six calls have been issued and latest 2019. The program requires collaboration between companies, researchers, and the political/public sector, which must all work proactively towards a joint strategic concept. The approach is to develop an institutional infrastructure that supports innovation within the renewed industrial structure of the region. During recent years has the program a stronger focus on sustainable development, green growth and societal benefits. The innovation clusters may receive funding up to 10 years.

Most important national public funder of innovation is the Swedish innovation agency, Vinnova. Every year, Vinnova invests approximately SEK 3 billion (EUR 0.29 billion) in research and innovation. The Swedish Agency for Economic and Regional Growth, Tillväxtverket has a government mandate to manage and distribute funding from the European Regional Development Fund (ERDF) in such a way as to support projects that promote growth and jobs. For the 2014-2020 programming period, the Agency distributed about SEK 8.5 billion (EUR 0.83

as innovative, resource-efficient and eco-friendly goods and services. Finally, each cluster organisation has at least 50 member companies and organisations collaborating both regionally, nationally, and internationally with a focus on improved diversity and equality.



	<p>billion) from the ERDF to eight regional structural fund programmes and one national regional fund programme.</p>	
<p><b>POLICY FOCUS</b></p> 	<p><b>No specific focus</b></p> <p>The National cluster programs/activities do not have a specific sector focus, but triple-helix collaboration is a requirement. The S3 Cluster Pilot is one tool to execute smart specialisation by strengthen regional prioritized cluster initiatives and their work with companies. The aim is to professionalize prioritized clusters with a strong emphasis on promoting enterprises' development and competitiveness. The objectives are to contribute to strengthen the regional cluster organizations 'strategic ability and to strengthen the companies' competitiveness, as well as increasing international collaboration. The overall aim in the Vinnväxt-program is to develop an institutional infrastructure that supports innovation within the renewed industrial structure of the region and where sustainability and green growth is stressed.</p>	<p><b>Cross-sectoral</b></p> <p>The programme intends to strengthen the development of the private sector by expanding the role of clusters as open innovation arenas for a growing number of collaborations between clusters, the private sector, academia, and other relevant actors. The guiding principles are the three areas indicated in Skåne's innovation strategy: Smart materials, Smart sustainable cities, and Personal health. An update of the innovation strategy now focusses on six specialisation areas: Advanced manufacturing and materials, Food innovation, The innovation system around ESS and Max IV, Life Science and Health, Smart and Sustainable Cities and Tech.</p>
<p><b>RESPONSIBLE AUTHORITIES</b></p> 	<p><b>In charge of drafting</b></p> <p><b>Provides funding</b></p> <p><b>Oversees the implementation</b></p> <p>The national agency for innovation, Vinnova is responsible for the Vinnväxt-program and besides funding is the agency taking an active part in facilitating exchange of experiences between the innovation clusters, offering training as innovation leadership etc.</p> <p>The Swedish Agency for Economic and Regional Growth Tillväxtverket support the clusters in the S3 Pilot with financial support directed towards the clusters' SMEs and by an active learning network.</p> <p>Tillväxtverket promotes and supports regions efforts in developing and implementing strategies for smart</p>	<p><b>Provides funding</b></p> <p><b>Oversees the implementation</b></p> <p>Region Skåne is the main responsible authority for the programme. The Region has formulated the policy and strategy, and provides funding. There is a network of cluster initiative CEOs to promote collaboration and knowledge sharing. The clusters are also supported in developing communication strategies.</p>



		specialization by facilitating network meetings and conferences to exchange experiences and disseminate knowledge to stakeholders.	
<b>BENEFICIARIES</b> 		<b>SMEs</b> <b>Cluster organisations</b> <b>Research organisations</b> <b>Civil society organizations</b> <b>Academic institutions</b> <b>Large firms</b>	<b>SMEs</b> <b>Cluster organisations</b> <b>Research organisations</b> <b>Academic institutions</b> <b>Start-ups</b>
		<p>The Swedish Agency for Economic and Regional Growth, Tillväxtverket, has selected 21 clusters for the S3 pilot cluster platform. The S3 pilot seeks to further strengthen the competence of clusters. The S3 cluster organizations comprise just over 2,400 participating enterprises, most of them SMEs, yet also larger companies, research and education institutions, and public organizations participate. The main beneficiaries are cluster organisations and SMEs.</p> <p>During 2020, nine Vinnväxt-initiatives were financed. The program supports innovation within the renewed industrial structure and in 2019 the innovation clusters developed 244 new prototypes, 81 new products, 91 new processes and 47 new services. The main beneficiaries are cluster organisations, private sector and academic and research.</p>	<p>The main beneficiaries are SMEs, start-ups, academic and research, as well as cluster organisations. The priorities are primarily support in the development of innovative products and solutions. For cluster organisations, the aim is to achieve excellence, which is why part of the programme is aimed at improving international competition, increasing the number of cluster members especially SMEs, and facilitating international partnerships.</p>
<b>INSTRUMENTS</b> 	Financial	<b>Funding collaboration initiatives</b> <b>Innovation: voucher, support to hire PhDs, cooperation with R&amp;I actors</b> <b>Financing networking events</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b>	<b>Funding collaboration initiatives</b> <b>Financing networking events</b> <b>Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b>



			<p><b>Financing start-ups</b></p> <p><b>Innovation: voucher, support to hire PhDs, cooperation with R&amp;I actors</b></p>
	<p><b>Technical assistance</b></p>	<p><b>Support for networking and partnership building (at national and/or international level)</b></p>	<p><b>Support for networking and partnership building (at national and/or international level)</b></p> <p><b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b></p> <p><b>Marketing activities: advertising, communication, events, fairs, and so on</b></p>
	<p><b>Explanation</b></p>	<p>The Swedish Agency for Economic and Regional Growth Tillväxtverket supports the clusters within the S3 Pilot with networking, partnership training and by financial support especially active SMEs in the clusters. The agency also promotes and supports the regions efforts in developing and implementing strategies for smart specialization by facilitating network meetings and conferences to exchange experiences and disseminate knowledge to stakeholders.</p> <p>Innovation clusters within the Vinnväxt-program can receive financial support up to 10 years. During the first years up to 50 percent and this proportion is getting lower after 3 years of funding. The national agency Vinnova facilitates networking and training across the clusters within the program.</p>	<p>The cluster initiatives in Skåne are funded in two parts over a period of five years. The financial instrument consists of two different parts: The basic funding for cluster members and the funding of open innovation arenas, which is described as a method to establish new partnerships between different kinds of stakeholders, e.g. trade, industry, academia, and the public sector.</p>
<p><b>HISTORY</b></p> 	<p><b>Period</b></p>	<p><b>Limited period</b></p>	<p><b>Unlimited</b></p>
	<p><b>Ending year (for policies with</b></p>	<p>-</p>	<p>-</p>



	<i>limited period)</i>		
	<b>Starting year</b>	-	-
	Explanation	This national strategy for sustainable regional development is designed for 2021–2030.	
<b>BUDGET</b> 	<b>Overall</b>	The Swedish Agency for Economic and Regional Growth (Tillväxtverket) is the managing authority for the European Regional Development Fund (ERDF) which has a total budget of slightly over EUR 777 million for promoting entrepreneurship, innovation, and a sustainable economy in general and about EUR 252 million for thematic objective 1 innovation and entrepreneurship for the programming period 2014-2020.	The total budget of the programme is approximatively EUR 7.9 million.  Region Skåne will gradually reduce the basic funding to EUR 97,000 per cluster organisation by 2021. The private sector and other members are expected to contribute a larger share of basic funding. The funding for the open innovation in cooperation will gradually increase from approx. EUR 291,000 per year in 2019 to EUR 680,000 per year in 2021. This increase will largely cover the reduction in basic funding. The cluster collaboration was funded in 2017 and 2018 from the existing budget for cluster development in Region Skåne
	<b>Annual</b>	S3 Cluster Pilot has a funding of approx. 15 million SEK directed towards SMEs. The budget in 2020 for the Vinnväxt-program is approx. 53 million SEK. Both budgets are completed with financial support regarding networking, analyses, training etc for the process leaders/cluster managers.	The annual budget is approx. EUR 1.5 million over the five-year period.
	<b>Source of funding</b>	Funding from the regions and from the industry are important besides the EU Structural Funds and from national agencies as Vinnova and Tillväxtverket	There are several funding sources for the programme: Region Skåne, EU Structural Funds, funds from the Swedish Agency for Innovation Vinnova, Nordic Innovation, Swedish Agency for Economic and Regional Growth Tillväxtverket.
	<b>Availability</b>	<b>ex-post</b>	<b>ex-post</b>



<p><b>POLICY EVALUATION</b></p> 	<p><b>Results</b></p>	<p>The ongoing programme evaluation of thematic objective 1 in ERDF in Sweden, which have a dedicated task to evaluate smart specialisation within the context of ERDF TO1, have pointed out that the process of developing RIS3 and the integration of smart specialisation was a late exercise which impeded well-consulted and thorough involvement and decisions. According to the ongoing evaluation, the ERDF-projects are generally in alignment with RIS3-priorities, between 83% and 100% for all regions except Stockholm. However, the evaluators also highlighted that priorities often are broad and quite numerous.</p> <p>The innovation clusters within the Vinnväxt-program have all an on-going evaluation (often researchers). Every 3rd year is an individual international evaluation conducted (commending the forthcoming 3 years. An External effect study was published in 2016.</p> <p>The S3 Pilot will be evaluated in 2021.</p>	<p>Evaluations show that the member companies in the cluster organisations think that membership has increased their competitiveness and also enabled increased cooperation with industry colleagues and with academia, incubators, and enterprises in other industries. The organisation's geographic concentration in Skåne has also made cooperation with other cluster members easier.</p>
<p><b>POLICY ALIGNMENT WITH THE EU PRIORITIES</b></p> 	<p><b>Green economy</b></p> <p><b>Social inclusion</b></p> <p><b>Digital transition</b></p>	<p><b>Digitalisation</b></p>	

# 03

## State of play of cluster policy



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### 3. State of play of cluster policy

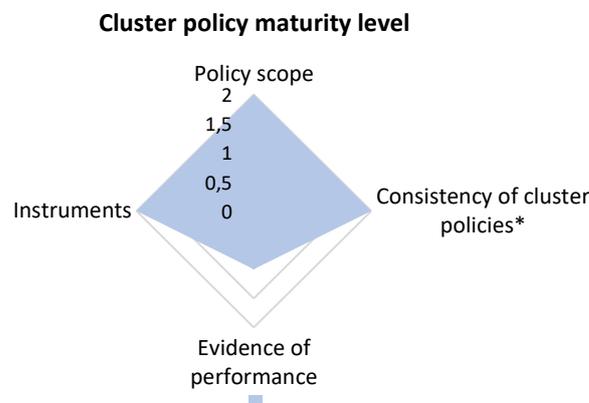
The data below illustrates how the country ranks in terms of maturity of cluster policy. The maturity index is based on a combination of factors presented in Chapter 2 and which are scored based on their existence:

- **Policy scope:** whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies (existence of broader policies = 1 point; existence of targeted cluster policies = 2 points)
- **Consistency of cluster policies:** assessment of the duration and experience of the country in doing cluster policies. This dimension assesses only existing cluster policies and not broader policies (no cluster policies available = 0 points; < 10 years of experience or > 10 years (but interrupted) = 1 point; > 10 years (but with clear continuity) = 2 points)
- **Evidence of performance:** the existence of monitoring and evaluation mechanisms determines the degree of policy development in the country (no evaluations = 0 points; existence of evaluations of past policies or in-itinere = 0.5 points; existence of ex-ante and/or ex-post evaluations = 0.5 points)
- **Instruments:** whether the policies provide any instruments to support the policy implementation, being these financial and/or technical assistance (1 point for each type of instrument available)

It is important to note that the maturity does not reflect the performance of a country, but only the degree of development of their cluster policy at the moment when the data was collected (2020). The maturity index illustrates how the country scores for each of these four dimensions (policy scope, consistency of cluster policies, evidence of performance and instruments) compared to the maximum score that they can reach.

	Sweden	Maximum score
Policy scope	2	2
Consistency of cluster policies*	2	2
Evidence of performance	1	1
Instruments	2	2

\* This dimension is scored solely if the country has a dedicated cluster policy and it assesses only cluster policies





## State of play of cluster policy in the country

<b>Policy evaluation (for terminated policies)</b>	<b>Availability of evaluations for terminated policies</b>  Smart specialisation strategies: There is an ongoing programme evaluation of thematic objective 1 in ERDF 2014-2020, and by termination of the policy in 2021, a final evaluation will be executed as well. Furthermore, as regions develop their smart specialised strategies, they may use the national network (S3 Network) for peer review and discussions. The network is administrated by the Swedish Agency for Economic and Regional Growth Tillväxtverket.
<b>Policy approach in the country</b>	<b>Cluster approach used directly by national/regional development agencies</b>  <b>Broad-based framework policies to support cooperation effectiveness</b>
<b>Continuity</b>	<p>The development of clusters has been a tool in business sector development in Sweden since the late 1990s. A study of Swedish cluster policies conducted by Harvard Business School and Stockholm School of Economics found that despite the private sector and academia encouraging cluster development, Swedish economic policy had for a long time taken a sceptical stance. Sweden has a long academic tradition of collaboration in specific geographic contexts. Furthermore, enterprises, academia, and the public sector have on own initiative shared an interest in innovation systems and triple helix collaboration. The 2004 national strategy for innovation introduced the cluster terminology in the context of a major economic policy strategy. Six sector specific industrial strategies for the leading sectors of the Swedish economy were established on the background of the strategy.</p> <p>The Vinnväxt programme for clusters offered by Vinnova is an important source of funding for regional clusters. The programme, which is run by Swedish Innovation Agency Vinnova since 2001, is the flagship project of Swedish cluster policies. In 2003, the first three regional clusters were selected through national calls for proposals for a ten-year programme with up to approx. EUR 600-800 000 annual funding per innovation cluster, along with advisory and process support. Another five clusters were selected in 2004 and four more in 2008 were admitted to the programme. New clusters have been selected in 2013, 2016 and 2019: three clusters at each time. The programme generally enjoys high marks internationally. Vinnväxt programme aims to promote sustainable innovation-driven regional growth by developing internationally competitive research and innovation environments in specific growth fields. The 10-year-funding-cycles are indeed long-term funding which cluster organisations praise as huge benefit for proper establishment of projects.</p>
<b>Consistency</b>	<b>&gt; 10 years (but with clear continuity)</b>  <p>Since the second half of the 1990s, a focus has been on policies that could increase economic growth by exploiting growth potential in all regions of the country. The geographical county or region was thus given increased responsibility for stimulating the country's growth, something that was previously primarily seen as one state national matter. Focus on innovation based on local and regional conditions therefore became a central part of the regional growth policy. The cluster policy of the Skåne Region is a good illustration of this. In the 1990s, the regional authorities established a development structure to encourage and support innovative entrepreneurships. In the beginning of the 2000s, the region introduced sectoral triple helix collaboration for increased competitiveness and thereby turned the policy focus from traditional clusters and corporate networks to regional innovation systems and international collaborations. From 2010s and onwards, the region has a policy emphasis on challenge-driven innovation for global competitiveness.</p>



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

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