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The Balkan Cluster



Bulgaria-Serbia
IPA Cross-Border Programme

CLUSTER NEEDS ASSESSMENT

IN THE NISAVA, PIROT, JABLANICA & PCINJA DISTRICTS

THROUGH THE BULGARIA-SERBIA IPA CROSS-BORDER PROGRAMME



The Balkan Cluster

*Nis City, Serbia
December, 2015*



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Responsibility

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CONTRACT TITLE: EXTERNAL EXPERTISE – CLUSTER DEVELOPMENT SERVICES

Contract no. 2007CB16IPO006 – 2011 – 2-167/TD-1

The project „The Balkan Cluster“ is co-funded by EU through the Bulgaria–Serbia IPA Cross-border Programme.



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LIST OF ABBREVIATIONS

BG	Bulgaria
CBC	Cross-Border Cooperation
EU	European Union
GDP	Gross Domestic Product
MSME	Micro, small and medium sized enterprises
NGO	Non governmental organization
SER	Serbia
SMEs	Small and medium sized enterprises



INTRODUCTION

The Balkan Cluster Project is co-funded by EU through the Bulgaria-Serbia IPA Cross-border Programme, aiming at creating a platform for collaboration of clusters, SMEs and support institutions in the cross-border region of Bulgaria and Serbia.

Key project activities are cluster mapping, survey of clusters' needs and drafting of a Strategy for the development of a Serbia-Bulgaria clusters network. The objective is to identify the potentials for building of cluster cooperation in Bulgaria – Serbia Cross border area.

Survey of cluster development in the Serbian cross border area were carried out through desk research and field work - face to face interviews in the Nisava, Pirot, Jablanica and Pcinja districts in terms of economic indicators and organisational forms and behaviour, as well as the strong and weak features of the business, institutional and legal environment of clusters development. 24 interviews on cluster needs assessment with cluster actors have been done on the field. Interviews have been done using survey questionnaires approved by the project team (Annex 1_ Questionnaire for cluster interviews). In order to better focus the Strategy, this questionnaire aimed at gathering information on clusters' organization, activities, competences, and needs, as well as on the strategic potential for the creation of Cross-Border Cluster Cooperation Network.



1. STRENGTHENING CLUSTERS IN THE CROSS-BORDER REGION OF BULGARIA AND SERBIA

Entrepreneurship is one of the most important drivers of local economic development. New enterprise formation – StartUps and the activities of small and medium-sized enterprises (SMEs) help drive job creation and economic growth through accelerating innovation and promoting the full use of human, financial and other resources. The vitality of the new and small business sector is therefore a major determinant of local competitiveness, whilst how local economies perform in this respect in turn influences national economic performance.

Public policy at local level can play a significant role in enhancing entrepreneurship performance by tackling the various market failures that can occur, for example in the supply of finance, premises, training and business advice, and by helping to overcome learning failures within local economies by building business competencies and networks for knowledge exchange. Local governments and development agencies should be active in the design and delivery of entrepreneurship programmes. This includes intervention to encourage more entrepreneurial attitudes, support for training, improving access to finance, promoting exports and internationalisation, supporting innovation and developing business networks.

Key operational steps of the strengthening clusters are:

- *Cluster identification*
- *Cluster mapping*
- *Cluster needs assessment*
- *Cluster development strategy, action plan and budget*
- *Monitoring and evaluation*



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The Cluster Mapping Process in Nisava, Pirot, Jablanica and Pcinja Districts included gathering of following data: *Name of Cluster, Location of Cluster Office, Cluster and clusters initiative / Governmentally supported cluster, National / Regional / Local mission, Traditional art/craft production / modern MSME, Large scale company / Vertical network / Horizontal network / both networks, Product Specialization, The age of technology, Export Potential, Market based / Resource based / Infrastructure based, One Major Problem (Marketing, Technology, Quality, Finance, etc.).*

The Cluster Map was created upon summarising survey results based on filed visits and face to face meetings using the structured interviews, showing location of cluster initiatives and clusters on the map of CBC Districts. 24 clusters and cluster initiatives were identified and mapped (Annex 2: List of clusters that participated in the survey).



2. CLUSTER NEEDS ASSESSMENT IN GENERAL

Cluster needs assessment provides the evidence base for strategic planning, as well as the baseline information upon which situation and response monitoring systems will rely. It should therefore form a continuous process throughout the cluster development cycle.

Coordinated assessments are carried out in partnership with all cluster actors – public sector, academia and companies, in order to assess the economic situation and to identify the needs of the identified and mapped clusters and cluster initiatives. Local and national authorities, educational and research and development institutions and small and medium sized enterprises are encouraged to participate in this process, the output of which is a cluster needs overview.

Cluster needs overviews should be produced once a year to support the National Cluster Development Organization in developing a shared understanding of the impact and evolution of a challenges and to inform response planning. This document presents a comprehensive analysis of the overall situation and associated needs. It is structured along the analytical framework developed for the cluster community in the targeted location.

The cluster needs overview builds and expands upon the needs analysis chapter of the cluster identification and cluster mapping, consisting of a discrete step in the implementation of the cluster development cycle. Its development is a shared responsibility among all cluster actors, requiring strong collaboration between national and/or regional cluster development strategy and information cluster development organization as well as support from the EU and the inter-cluster coordination mechanism.

To support the prioritization of needs, the cluster development organization use a standardized tool based on a severity ranking approach. The tool provides a method and structure to prioritize needs by categorising and weighing indicators along geographical areas, sectors, inter-sectoral aspects and demographics. It can be adapted to either data poor or data rich contexts. Findings derived from applying this tool should be included in the cluster needs overview. The tool is optional, and other tools developed for different contexts may alternatively be used for severity ranking.



In addition, each cross-border country will continue to produce a cluster development dashboard to present data on needs, response monitoring and gaps per challenge in an easily digestible format, based on the information presented in the cluster needs overview.

General aims of the cluster needs assessment:

- Debate cluster policy development; the rationale for policy intervention and the types of cluster support policies;
- Study the instruments and policies necessary to foster the development of SME clusters
- Provide know-how and support to participants willing to promote SME cluster development in the CBC region

Specific aim of the cluster needs assessment:

Gathering, discussion and analysis of the needs of cluster actors as a starting point for strategic planning of cluster-based sustainable development of SMEs.



3. OVERVIEW OF THE RESOURCES AND THE BUSINESS POTENTIAL FOR CROSS-BORDER CLUSTERS COOPERATION

Based on strategic challenges the CBC SER-BG economics sectors are classified into 15 business typologies: *Energy, metal and electro industry; Construction; Agro and food processing; Wood processing; Entrepreneurship; Footwear, textile, leather; Trade, tourism, transport and catering; Health care; Craftsman; Consulting and Business Services; Recycling; ICT; and Automotive.*

The cross-border region Bulgaria - Serbia is characterized by a very diverse topography and climate, determining a wide variety of soils, habitats and species.

The soils in the region are suitable for the growing of almost all crops - cereals such as wheat, barley, corn, rye, oats, rice, spelt, sunflower, hops, hemp, potatoes, vines, fruit, vegetables and others. The territory of the region hosts many natural attractions - caves, rock formations and beautiful waterfalls. The region is characterized with a high biodiversity - a number of unique and rare and endangered plant and animals. There are several biosphere reserves and many protected areas and zones. Such biodiversity allows the transformation of the region into an attractive center for men of science, students and nature lovers from all over the world. Inhabited since ancient times, the region naturally has a rich cultural and historical heritage. Many religious and cultural-historical monuments from antiquity to the present day can be found here. The region is rich in mineral resources, part of which are of vast economic significance, but its greatest asset are the thermal mineral springs with established remedial properties. As a whole, the region has a good transport accessibility, but needs additional investment in both road infrastructure, public sewerage, treatment plants and tourism infrastructure. The analyses of the resources in cross-border region Bulgaria-Serbia made within the project show development opportunities in different directions.

Some of the most underdeveloped areas in both countries are located within the Sofia – Nisava, Pirot, Jablanica and Pcinja districts. The structure of the economy is diverse. The analyzes suggest that the overall leading role belongs to industry - mining and processing, followed by services and agriculture.

This cluster needs assessment pointed the following areas for cross-border clusters cooperation:



- Encourage the development of a broader **food processing industry**, based on the competitive advantages CBC region has, and the rapidly changing taste for added valued pre-prepared foods.
- Prepare for the development of a **tourism industry** based on CBC region heritage, again this is based on the changing trends in the tourism. Tourism in all its forms – educational, scientific, eco, rural, religious, but most of all health and recreational tourism, was identified as being the main branch with the largest and yet unused potential for economic recovery, employment and long-term sustainable development of the region. According to the World Economic Forum, the tourism industry accounts for 9% of the global GDP and supports 120 million jobs in tourism and 125 million jobs in ancillary businesses; one new job in the respective destination is created for every 30 new tourists¹.
- Enable the development of the **ICT, wood processing /furniture production, textile, construction industries** and **production of energy from renewable sources**.

Cross-border Cross Cluster linkages are recommended in the following area:

- **Agro-Health Tourism Clusters:** production of quality food and beverages; production of herbs, honey and other products needed in the spa center;
- **Tourism – Transport & Logistic Clusters:** offering of tourist, host and transportation services for the provision of comfort and recreation besides the procedures, including visitations of natural, cultural-historical and religious landmarks in the region.
- **Wellness and Health Tourism – Energy Efficiency Clusters,** refreshing spa procedures and a variety of additional tourist activities.
- **Wellness – Dental - Health Tourism Clusters:** offering a number of other services of high quality and at competitive prices like dentistry, cosmetic, physical therapy.
- **Alternative Tourism – Old Crafts and Art Clusters:** Rural tourism; research tourism – traveling with an interest in geology, ornithology, botany, wildlife observation; eco-tourism; mountain tourism; adventure tourism - biking, horse riding, skiing and snowshoeing,

¹ <http://www.weforum.org/content/global-agenda-council-new-models-travel-tourism-2012-2014-0>



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mountain biking, boating, scuba diving, caving, paragliding, climbing, crossing alpine routes with a guide; thematic tourism - related to cultural and historical heritage; tourism associated with the esoteric and religion (visits to monasteries, shrines and sacred places), wine, traditional cuisine, ethnography and traditional music and crafts - observation and training in traditional crafts: embroidery, weaving, knitting, ceramics, carving, casting bells and making musical instruments.

Cross-border Cross Cluster-based economic development should be focused on the development of **special CBC regional brand** offering high-quality traditional food products made in the CBC region such as fruit, vegetables, meat, milk, honey, etc.



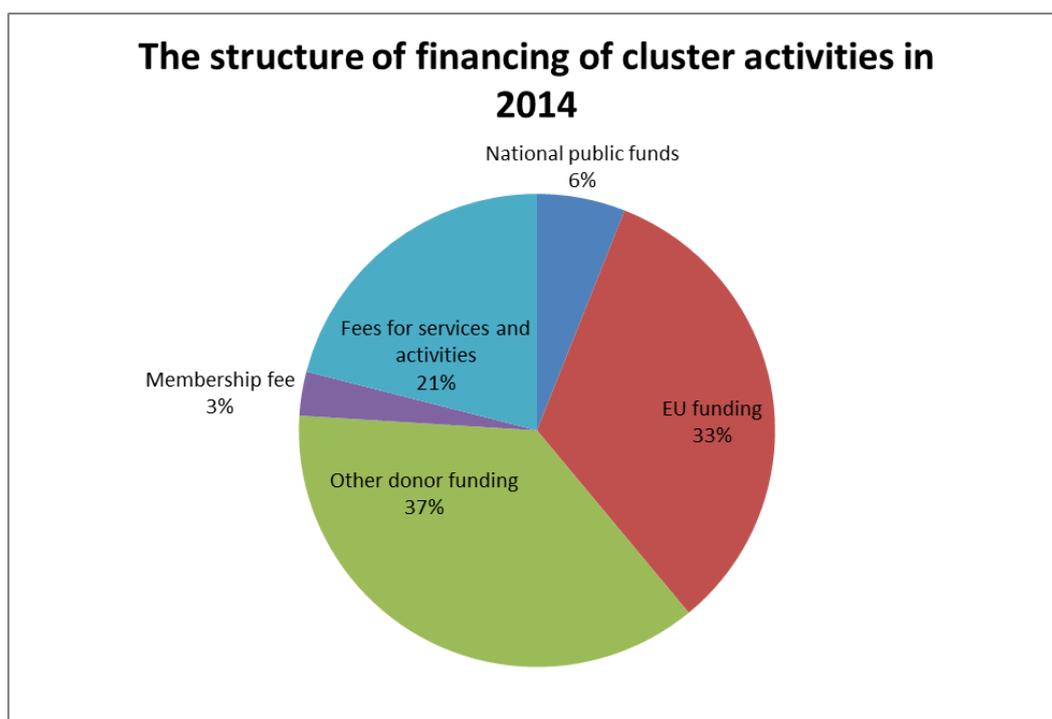
4. SURVEY OF CLUSTER NEEDS IN THE CBC REGION

Questionnaire (Annex 2: List of clusters that participated in the survey) was filled by 24 mapped clusters in the cross-border region Serbia (100%). There are 17 clusters and 7 cluster initiatives. Clusters were established in the form of association / NGO. The average age of existing of the clusters is 5 years.

The average number of members is 380 entrepreneurs and SMEs and 75 supporting institutions.

The average annual budget for cluster activities in 2014 was 19.375 EUR.

The structure of financing of cluster activities in 2014 is the following: National public funds 6%, EU funding 33%, Other donor funding 37%, Membership fee 3%, Fees for services and activities 21%

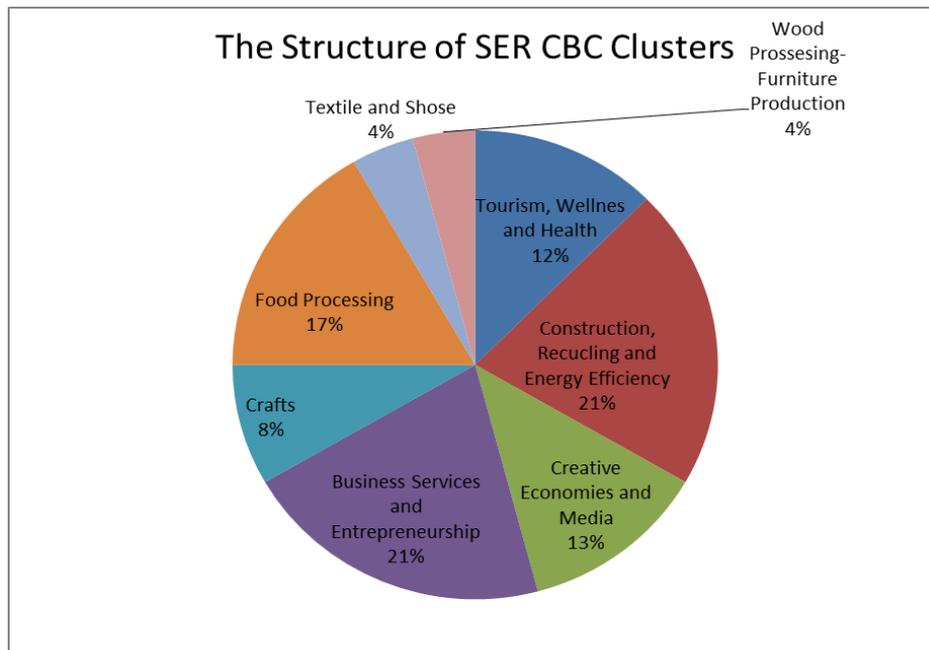
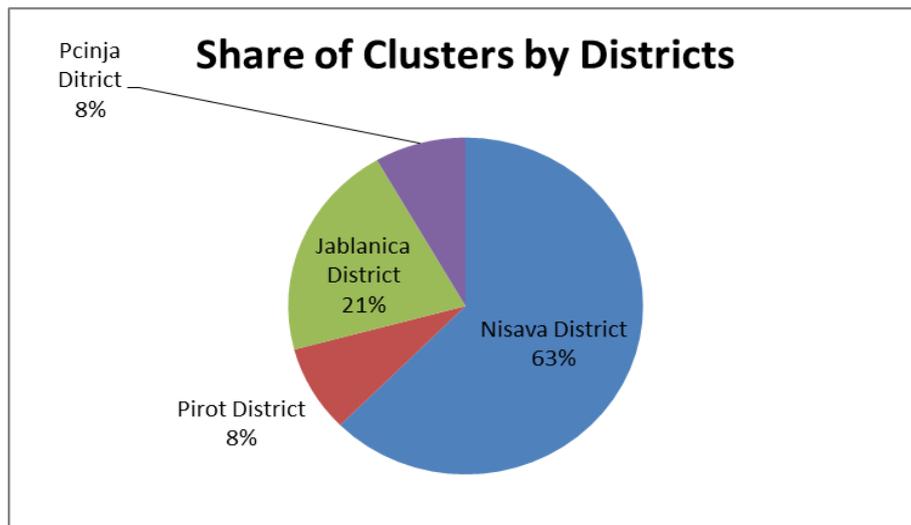


The average number of employees in the clusters - business members in 2014 is 1.950 people.



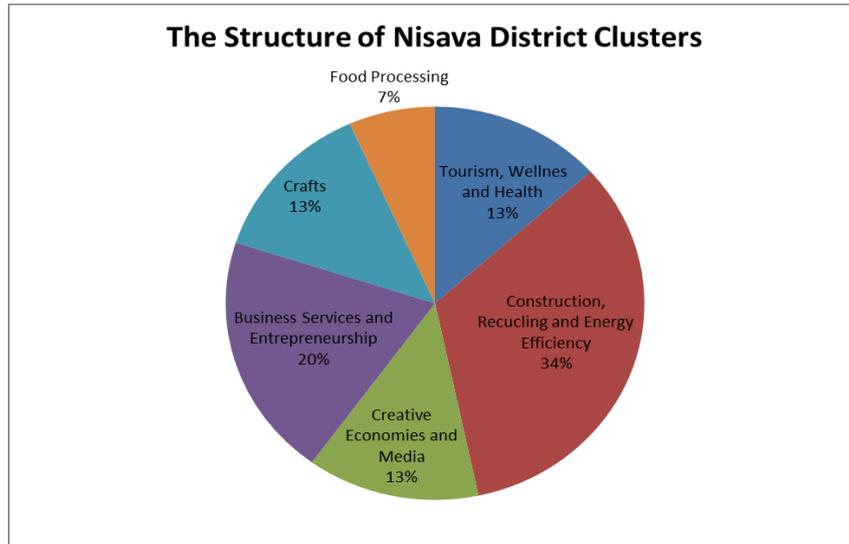
- CLUSTER INFORMATION, STRUCTURE AND ORGANIZATION

Based on general information about clusters, there are 15 clusters in Nisava District, 2 clusters in Pirot Districts, 5 clusters in Jablanica District and 2 in Pcinja District.

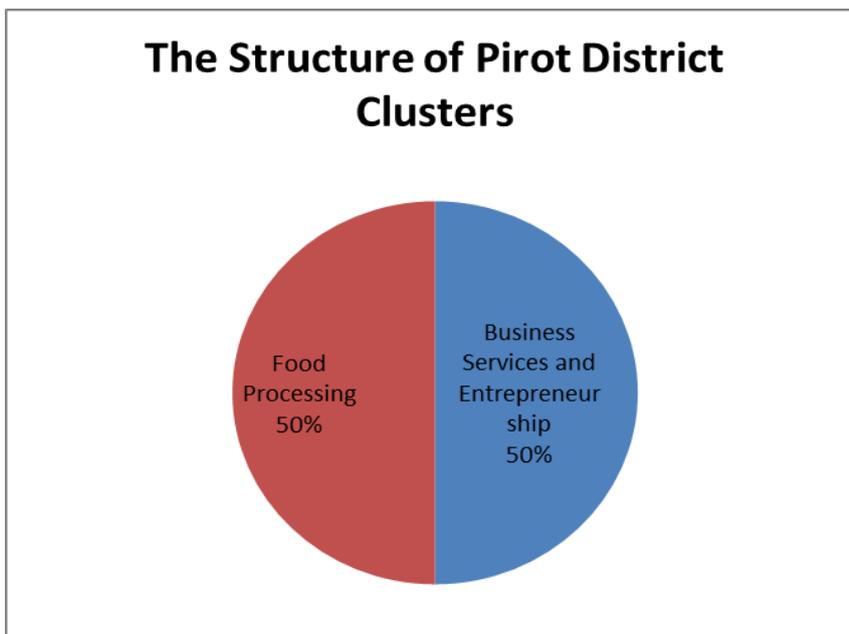




In Nisava District, clusters are initiated or established in the following economic fields: Tourism, Wellnes and Health 2; Construction, Recucling and Energy Efficiency 5; Creative Economies and Media 2; Business Services and Entrepreneurship 3; Crafts 2; Food Processing 1.

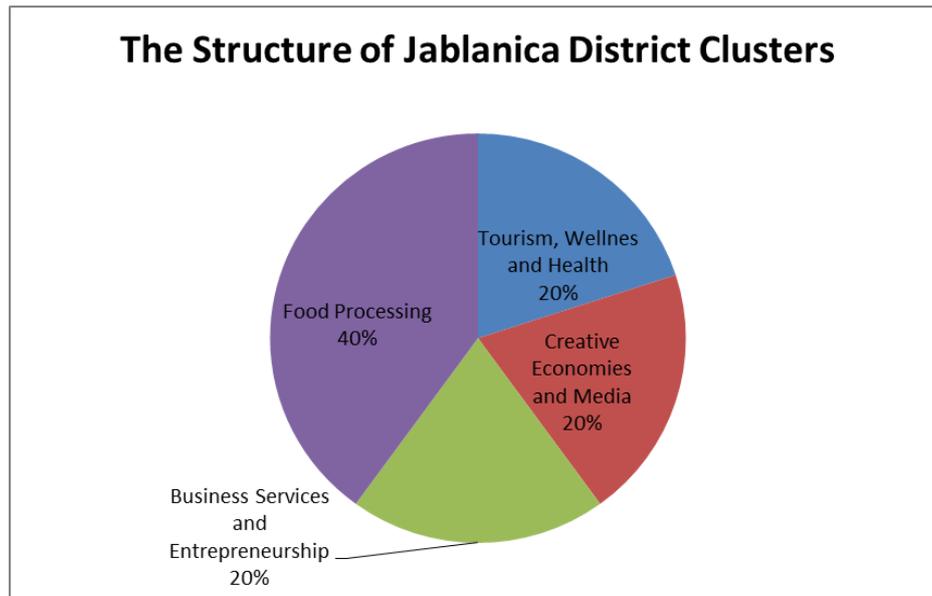


In Pirot District, clusters are initiated or established in the following economic fields: Business Services and Entrepreneurship 1 and Food Processing 1.

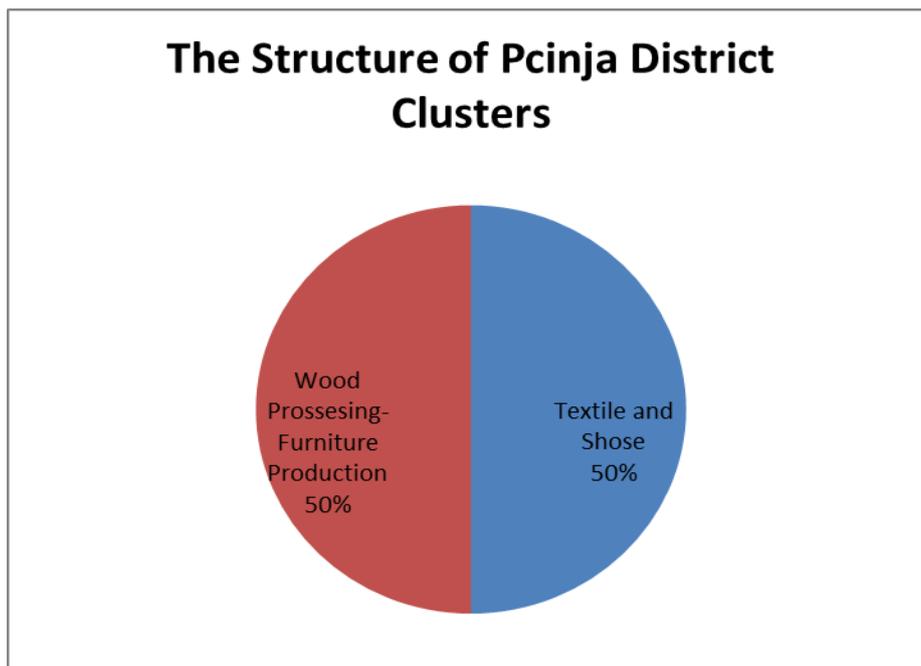




In Jablanica District, clusters are initiated or established in the following economic fields: Tourism, Wellnes and Health 1; Creative Economies and Media 1; Business Services and Entrepreneurship 1; Food Processing 2.



In Pcinja District, clusters are initiated or established in the following economic fields: Textile and Shose 1; Wood Prossesing-Furniture Production 1.





Clusters for the most suitable transfer of knowledge selected workshops (66.7%), trainings and seminars (41.7%) and at least study tours.

Considering 84.6% positive replies to the need of clusters for a trained cluster facilitator, it can be concluded that the awareness on the cluster development as the way of joining of enterprises in the region is high.

Majority of participants – 69.2% list team management as the skill that would significantly contribute to promotion of cluster activities. The highest ranked cluster management needs are also business planning and internal communication among members (61.5%), whereas 46.2% participants stated that management skills would be important for further development of their clusters. Need for development of these skills points to the significance of internal communication for progress of clusters in Serbia. More than one third of participants (38.5%) list development of business idea, change management and crisis management as properties that need to be improved in the modern turbulent business environment.

Today marketing is considered to be an important business skill for any organization. Regarding clusters in Serbia, majority of participants selected marketing planning with market segmentation (69.2%) as a discipline essential for their marketing performance. 53.8% of cluster representatives hold marketing planning, consumers behaviour and branding skills responsible for better visibility and image. The importance of internet marketing was pointed out by 46.2% of participants – representatives of clusters in CBC region Serbia.

The most significant limiting factor of the cluster development in the region is the lack of trust between members. Cluster represents competition and cooperation at the same time, so it is most important to invest into the social capital. The need for that is expressed by the representatives of clusters from the project covered cross-border region in Serbia as well (84.6%).

92.3% of positive answers on questionnaire show that cluster development activities of “The Balkan Cluster” project support clusters operations and make the project team commit to perform even better in the upcoming period.



ANNEX 1: QUESTIONNAIRE FOR CLUSTER INTERVIEWS



Questionnaire for cluster interviews

The Balkan Cluster Project is co-funded by EU through the Bulgaria-Serbia IPA Cross-border Programme, aiming at creating a platform for collaboration of clusters, SMEs and support institutions in the cross-border region of Bulgaria and Serbia.

The project duration is 12 months. The project activities started in May 2015 and will be implemented by two project partners: the Foundation for Entrepreneurship Development, Sofia and the Cluster House, Nis.

One of key project activities is cluster mapping and survey of clusters' needs and drafting of a Strategy for the development of a Serbia-Bulgaria clusters network. The objective is to identify the potentials for building of cluster cooperation in Bulgaria – Serbia Cross border area.

In order to better focus the Strategy, this questionnaire aims at gathering information on clusters' organization, activities, competences, and needs, as well as on the strategic potential for the creation of Cross-Border Cluster Cooperation Network.

GLOSSARY:

Clusters are the form of joining of companies that initiates innovations, productivity and competitiveness through cooperation between the business communities, educational – research institutions and the public sector. Clusters are considered to increase the productivity with which companies can compete, nationally and globally.



Name of the organization:	
Contact person:	
Address: (street, city, district)	
Phone:	
Fax:	
E-mail:	
Web :	
Mission:	
Name and position of person interviewed	
Vision:	
Strategic goals:	
Reference/Key projects:	1. 2. 3.

1. When was the cluster started?

Year:

2. What is the legal form of the cluster (e.g. as NGO, company, cooperative)?

.....

3. Who is the organisation responsible for the cluster?

.....

4. What is the thematic focus of the cluster?

.....

Coding table

1. Aerospace	1
2. Agro-food	2
3. Automotive	3
4. Biotechnology	4
5. Business & Financial Services	5
6. Chemical	6
7. Construction (incl. equipment)	7
8. Creative	8
9. Electronics, Electrical Equipment	9



- | | |
|------------------------------------|----|
| 10. Energy | 10 |
| 11. Environment/Green Technologies | 11 |
| 12. Footwear and Leather | 12 |
| 13. Healthcare | 13 |
| 14. ICT | 14 |
| 15. Crafts | 15 |
| 16. Logistics | 16 |
| 17. Materials and new Materials | 17 |
| 18. Mechatronics | 18 |
| 19. Media | 19 |
| 20. Metal Processing/Manufacturing | 20 |
| 21. Micro- and Nanotechnologies | 21 |
| 22. Optics and Photonics | 22 |
| 23. Packaging | 23 |
| 24. Plastics | 24 |
| 25. Printing | 25 |
| 26. Production Technology | 26 |
| 27. Software | 27 |
| 28. Telecommunications | 28 |
| 29. Textile | 29 |
| 30. Tourism | 30 |
| 31. Transport, Infrastructure | 31 |
| 32. Wood, Paper, Furniture | 32 |
| 33. Other (please, specify): _____ | |

5. How many members does the cluster have at present?

	Number
Cluster members in total:	
Enterprises:	
of which SMEs:	
Universities and educational institutions	
Other research institutions	
Business support institutions/NGOs	
Others, specify _____	



6. What was the annual budget for cluster activities in 2014?

EUR:

7. What sources of financing are used for the cluster activities in 2014?

	Used	% of total budget
National public funds (central, regional or local government)		
EU funding		
Other donor funding		
Membership fee		
Fees for services and activities		
Others specify		

8. How many employees are working in the cluster management at present?

Please, estimate and provide in full-time equivalent).....

9. What are the main activities of the cluster?

Information and communication activities	1.
Networking of cluster members	2.
Initiation of research projects	3.
Initiation of collaborative projects (with companies)	4.
Trainings and seminars	5.
Internationalisation of SMEs	6.
Marketing and promotion	7.
Policy actions	8.
Other, specify _____	9.

10. Has the performance of the cluster been evaluated?

Yes 1 No 2

If yes, please provide details on the evaluation carried out (purpose, evaluator, year, etc.)

.....



11. What are the targets and strategies of the cluster?

Strengthening the competitiveness of cluster companies	1.
Supporting research and innovation in cluster companies	2.
Creation of cooperative networks among cluster companies	3.
Creation of research networks	4.
Knowledge transfer	5.
Visibility and profiling of the region (location marketing)	6.
Cross-cluster-cooperation at regional and national level	7.
Internationalisation of cluster	8.
Other, specify _____	9.

12. Are strategic documents on your cluster available?

Yes 1 No 2

13. If yes, please provide details:

Multi-annual cluster strategy document/programme	1
Annual cluster strategies/programmes/plans	2
Other, specify _____	3

14. What kind of support does your cluster require most in the future? (Please choose ONLY one option)

Field specific support e.g. in internationalization/cross-border cooperation	1.
Non-monetary support e.g. coaching	2.
Financial support	3.
Other, specify _____	4.

15. Which kind of non-monetary cluster support do you regard as useful?

Coaching	1.
Networking events	2.
Databases	3.
Visibility	4.
Trade fairs	5.



Communication platforms	6.
Provision of infrastructure (e.g. offices, furniture, equipment etc.)	7.

16. Core competences and strengths of the cluster

16. 1 Strength: Please, describe the specific core competences and strengths of the companies and research institutions of your cluster

.....

16. 2 Weaknesses and threads: Please, describe the specific weaknesses and threads of the companies and research institutions of your cluster

.....

16. 3 Opportunities: Please, describe the specific competitive advantage of the companies and research institutions of your cluster

.....

17. Do you have active international cooperation links with other clusters/business networks?

Yes 1 No 2

If yes, please provide details

.....

18. Have you participated in international projects in the last 5 years?

Yes 1 No 2

If yes, please specify the funding Programme

.....

Coding of programmes

Programmes of European Territorial Cooperation	1.
Cross-border co-operation programme Bulgaria-Serbia	1.1
Other cross-border co-operation programmes	1.2
Transnational co-operation programmes (such as, South-East Europe...)	1.3
Interregional co-operation programme (INTERREG)	1.4
Seventh Framework Programme (2007-2013)	2.
Research for SME Associations	2.1
Regions of Knowledge	2.2



Research for SMEs	2.3
Competitiveness and Innovation Framework Programme (CIP)	3.
Information Communication Technologies Policy Support Programme (ICT-PSP)	4.
Others	5.

19. Have you participated in the Bulgaria-Serbia Cross-Border Cooperation Programme?

Yes 1 No 2

20. If yes, please describe role and involvement in the project

Lead partner	1.
Partner organisation	2.
Supporting organization, not included in the project	3.
Member of the working group	4.
Participant in training or similar events	5.
Other specify	6.

21. What is your level of knowledge on Bulgaria-Serbia Cross-Border Cooperation Programme?

1	2	3	4	5
Low		Medium		High

22. What is, according to you, the strategic relevance of Bulgaria-Serbia Cross-Border Cooperation for your cluster initiative?

1	2	3	4	5
Low		Medium		High

23. Where do you see the benefits of the cross-border cooperation of Bulgarian and Serbian cluster initiatives or networks?

Establishment of international contacts and transnational collaboration for cluster	1.
Access to new/international markets	2.
Access to innovative developments, technologies	3.
Strengthening of international value chains	4.
Access to public funds (EU projects or other multilateral funding)	5.
Raising international visibility of the cluster and/or the cluster region	6.



Increasing the mobility of human resources of cluster companies	7.
Internationalisation of cluster policy	8.
Attraction of new cluster members	9.
Cost reduction through usage of synergies	10.
Other specify	11.

24. What are the main barriers/difficulties for the development of cross-border cooperation of Bulgarian and Serbian cluster initiatives or networks?

Funding for activities	1.
Lack /low interest of the cluster members	2.
Objectives and results of Cross Border projects not fully in the scope of cluster strategy	3.
Lack of knowledge on EU programmes	4.
Lack of contacts	5.
Intercultural problems	6.
Missing adequate support on policy level	7.
Other specify	8.

25. Are you interested in increasing the cooperation with clusters in Bulgaria (Serbia)?

Yes 1 No 2

Comment

.....

26. What potential actions may foster co-operation of clusters in the Bulgaria-Serbia Cross-border Region?

.....

.....

Thank you very much for your time!



The Balkan Cluster – Balkan klaster – Балкански нлъстер
 N°: 2007CB16IP0006-2011-2-167
 The project is co-funded by EU through the Bulgaria-Serbia IPA Cross-border Programme
 Овај пројекат се кофинансира од стране Европске уније кроз ИПА Програм пренограничне сарадње Бугарска-Србија
 Пројекат е со-финансиран од Европскиот савез кроз Програмата за трансгранично сорадуништво по ИПА Бугарија-Србија





ANNEX 2: LIST OF CLUSTERS THAT PARTICIPATED IN THE SURVEY

NISAVA DISTRICT	MEDICAL START UP CLUSTER, NIS
	CONSTRUCTION CLUSTER "OPEKA-BRICK", NIS
	CONSTRUCTION CLUSTER "DUNDJER", NIŠ
	CLUSTER OF ART AND OLD CRAFTS "VILIN VEZ", NIS
	CLUSTER "DESIGN AND PRINT – DIS NIS", NIS
	GREEN BUILDING CLUSTER, NIS
	RECYCLING CLUSTER "SOUTH", NIS
	WOMEN ENTREPRENEURSHIP CLUSTER "ZA", GADZIN HAN
	CLUSTER OF TRADITIONAL HANDY CRAFTS "ETNO FORUM", SVRLJIG
	CLUSTER OF ENTREPRENEURS, ALEKSINAC
	CLUSTER OF CHEESES "SOUTH", NIS
	CLUSTER INITIATIVE OF MEDIA, NIS
	CLUSTER INITIATIVE OF CONSULTANTS AND BUSINESS SERVICES, NIS
	CLUSTER INITIATIVE OF ECO TOURIST "BANJAC", NIŠKA SPA
	CLUSTER INITIATIVE OF ENERGY EFFICIENCY AND RENEWABLE ENERGY OF THE SOUTH SERBIA, NIS
PIROT DISTRICT	CLUSTER OF ENTREPRENEURS, PIROT
	CLUSTER OF PRODUCERS OF SAUSAGES "PEGLANA SAUSAGE", PIROT
JABLANICA DISTRICT	REGIONAL FRUIT PRODUCERS CLUSTER OF THE SOUTH SERBIA, LESKOVAC
	TOURIST CLUSTER "RADAN", LEBANE
	CLUSTER INITIATIVE "TASTE OF THE SOUTH", LESKOVAC
	CLUSTER INITIATIVE OF YOUTH ENTREPRENEURSHIP "ACTIVATOR", LESKOVAC
PCINJA DISTRICT	CLUSTER INITIATIVE "CREATIVE ECONOMIES", LESKOVAC
	CLUSTER OF SHOES PRODUCERS "KOSTANA-SHOES", VRANJE
	SERBIAN CLUSTER OF FURNITURE, VRANJE