



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

# Country factsheet

Colombia

An initiative of the European Union





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# 01

## Introduction and economic policy context



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# 1. Introduction and economic policy context



This document presents an overview of the cluster policy in Colombia. 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 [OECD Economic Outlook of Colombia 2023](#). This report is twice-yearly analysis of the major global economic trends and prospects for the next two years. Prepared by the OECD Economics Department, the Outlook puts forward a consistent set of projections for output, employment, government spending, prices and current balances based on a review of each member country of the induced effect on each of international developments.

The COVID-19 pandemic caused an unprecedented economic shock to the Colombian and global economy. The Economic Recovery Plan of Colombia<sup>1</sup> sets out a new phase of support, investment, and policies for a new stage of economic recovery and renewal, with new measures for businesses and affected sectors, and details for existing emergency pandemic financial support. Colombian clusters are mentioned in the plan as key productive elements within the extractive industry that facilitate the execution of projects. In addition to the consequences of the COVID-19 pandemic, reports by the United Nations show that the Russian military aggression against Ukraine triggers an increase of poverty in Colombia.<sup>2</sup>

As an example of clusters policies, [The Colombian Cluster Network](#) is an initiative of the Ministry of Commerce, Industry and Tourism that aims to articulate the managers of Cluster Initiatives in the country, as well as those leaders linked to the development and strengthening of clusters and/or productive bets. Currently, there are 161 Cluster Initiatives registered in the Colombian Cluster Network. These initiatives are present in 28 departments and dynamise the regional economy through collaborative strategic agendas. In addition, 360,000 companies are articulated under these Cluster Initiatives. The Chambers of Commerce play a crucial role in this process, with 39 Chambers of Commerce supporting the development of Clusters. These initiatives seek to enhance the process of productive transformation from the local level.

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

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

<sup>1</sup> National Recovery Plan: Colombia. <https://colaboracion.dnp.gov.co/CDT/Conpes/Econ%C3%B3micos/4023.pdf>

<sup>2</sup> United Nations (2022): The Economic Impact of the War in Ukraine on Latin America and the Caribbean. Available under: <https://www.undp.org/sites/g/files/zskgke326/files/2022-08/PDS-Number29%20Ucrania%20EN.pdf> (last access on 22.03.2023).

# 02

## National cluster policy, programmes and initiatives



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## 2. National cluster policy, programmes and initiatives

In this section we provide an overview of the existing Colombian cluster-related policies on the national as well as an example of the regional level cluster-related policy. The breakdown is presented in the form of a table, with the first column showcasing information on the aspects which constitute the policy (beginning with 'Policy Objectives', following with 'Policy Focus', etc.). The second column represents the case of a Colombian sectoral policy, whilst the third represents an exemplary broad cluster policy in Colombia. The fourth column showcases a regional, broad policy, an example of a regional cluster policy in Colombia for the region of Bogota.

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


**Table 1: Overview of Colombian cluster-related policy**

Policy type:	Sectoral policy	Broad policy	Broad policy
Policy name:	<u>Productive Development Policy</u>	<u>Internationalization policy for productive development</u>	<u>Smart Specialization Strategy Bogota</u>
<b>POLICY OBJECTIVES</b> 	<b>Strengthening cooperation between companies or industry and RTDI actors</b> <b>Increasing competitiveness and boosting scale up of SMEs</b> <b>Supporting internationalisation activities</b> <b>Enhancing the visibility of clusters</b> <b>Fostering R&amp;D activities, technology development and implementation</b>	<b>Strengthening cooperation between companies or industry and RTDI actors</b> <b>Increasing competitiveness and boosting scale up of SMEs</b> <b>Supporting internationalisation activities</b> <b>Enhancing the visibility of clusters</b> <b>Fostering R&amp;D activities, technology development and implementation</b>	<b>Increasing competitiveness and boosting scale up of SMEs</b> <b>Fostering R&amp;D activities, technology development and implementation</b> <b>Fostering innovation and strengthening innovation ecosystems</b> <b>Supporting cluster excellence and professionalisation of cluster management</b>



Policy type:	Sectoral policy	Broad policy	Broad policy
Policy name:	<a href="#">Productive Development Policy</a>	<a href="#">Internationalization policy for productive development</a>	<a href="#">Smart Specialization Strategy Bogota</a>
	<b>Supporting cluster excellence and professionalisation of cluster management</b>  <b>Supporting the creation of new cluster organisations</b>  <b>Promoting social and sustainable economy and other solidarity-based initiatives</b>  <b>Promoting employment and upgrading skills and competences</b>  <b>Strengthening the network of cluster organisations/cross-clustering</b>  <b>Connect to global supply chains</b>	<b>Supporting the consolidation of existing cluster organisations</b>  <b>Supporting the creation of new cluster organisations</b>  <b>Promoting resilience and sustainable economy and other solidarity-based initiatives</b>  <b>Promoting employment and upgrading skills and competences</b>  <b>Enhancing territorial cohesion (through RIS3)</b>  <b>Strengthening the network of cluster organisations/cross-clustering</b>	<b>Supporting the consolidation of existing cluster organisations</b>  <b>Promoting social and sustainable economy and other solidarity-based initiatives</b>  <b>Promoting employment and upgrading skills and competences</b>  <b>Strengthening the network of cluster organisations/cross-clustering</b>
	<p>The Productive Development Policy (PDP) for Colombia promotes transformation towards more productive activities and greater diversification of goods production and exports. It allows the national government to work with regional governments to jointly decide on the priorities for production development and has enabled more coordination across government departments to create a business ecosystem that is</p>	<p>In order for the country to take advantage of internationalisation as a means to accelerate the progress and growth of the different territories of the Colombian economy, the national government approved CONPES 4085 or Internationalisation Policy for Regional Productive Development.</p>	<p>The Strategic Specialization Strategy Bogotá is a dynamic strategy that was created as a means to enhance regional capabilities and international trends. The Strategic Specialization Strategy aims to develop “governance, confidence, cooperation, efficiency and collaborative dialog for the strategic management of a region's development.” The Strategic</p>




Policy type:	Sectoral policy	Broad policy	Broad policy
Policy name:	<a href="#">Productive Development Policy</a>	<a href="#">Internationalization policy for productive development</a>	<a href="#">Smart Specialization Strategy Bogota</a>
	conducive for firm growth and greater levels of competitiveness.		Specialization Strategy creates specialisation areas that combines differentiation, innovation and technology. The Strategy is not just focused on Bogotá but covers the entire Cundinamarca department (region) and is part of the PDP.
<b>POLICY FOCUS</b> 	<b>Sectoral</b>	<b>Sectoral</b>	<b>Cross-Sectoral</b>
	<p>The Productive Development Policy outlines 90 actions across 7 areas: transfer of knowledge and technology, innovation and entrepreneurship, human capital, financing, supply chains, quality, foreign trade.</p> <p>There are 18 sectors that are prioritised by the PDP: cocoa and its derivatives, speciality coffee and coffee derivatives, pisciculture, bovine meat, dairy products, fruits and their derivatives, processed foods, transportation, construction, fashion, cosmetics, pharmaceuticals, basic chemistry, plastics and paint, outsourced services, software and IT, wellness tourism, and nature tourism.</p>	<p>There are 5 strategic aims:</p> <ol style="list-style-type: none"> <li>1. Facilitate the interaction of the productive apparatus with foreigners and Colombians residing abroad for the adoption, adaptation and creation of new technologies.</li> <li>2. Promote the closing of the technological gap of Colombian companies and the increase in their productivity through technological extension efforts for their insertion in GVCs and the attraction of strategic FDI at the national and departmental levels.</li> <li>3. Improve the conditions that allow a better performance of foreign trade in goods and services, as a means to close the country's technological gap.</li> </ol>	<p>There are five main areas that were prioritised, all of which consist of a series of productive activities. The areas are a mixture of consolidated areas and emerging areas some areas. They include Bogotá Creative Region, Bio-Pole, Enterprise Services, Advanced Knowledge Hub and Sustainable City Region.</p>



Policy type:	Sectoral policy	Broad policy	Broad policy
Policy name:	<a href="#">Productive Development Policy</a>	<a href="#">Internationalization policy for productive development</a>	<a href="#">Smart Specialization Strategy Bogota</a>
		<p>4. Strengthen the role of the innovation ecosystem in the adoption and adaptation of technology to increase productivity and the development of new markets and products.</p> <p>5. Strengthen the institutional frameworks for internationalisation through the consolidation of the region/Department dialogue with the national Government, and between the different entities of the national order.</p>	
<b>RESPONSIBLE AUTHORITIES</b> 	<b>In charge of drafting</b> <b>Both drafting and implementation</b> <b>Provides funding</b> <b>Oversees the implementation</b>	<b>In charge of drafting</b> <b>Both drafting and implementation</b> <b>Provides funding</b> <b>Oversees the implementation</b>	<b>In charge of drafting</b> <b>Provides funding</b> <b>Oversees the implementation</b>
	The Colombia Ministry of Commerce and the National Council for Economic and Social Policy are responsible for administering the program.	National economic and social policy council Republic of Colombia national planning department.	The main responsible authorities are the Chamber of Commerce of Bogotá (CCB) and Connect Bogotá Region, but citizens, entrepreneurs, researchers, academics, the public and private sectors, have all participated in the development and construction of the strategy.
	<b>SMEs</b>	<b>SMEs</b>	<b>Research organisations</b>



Policy type:	Sectoral policy	Broad policy	Broad policy
Policy name:	<a href="#"><u>Productive Development Policy</u></a>	<a href="#"><u>Internationalization policy for productive development</u></a>	<a href="#"><u>Smart Specialization Strategy Bogota</u></a>
<b>BENEFICIARIES</b> 	<b>Cluster Organizations</b> <b>Business associations</b> <b>Large firms</b> <b>NGOs</b> <b>Technology centres</b> <b>General population</b> <b>Policy Makers</b>	<b>Cluster organisations</b> <b>Start-ups</b> <b>Business associations</b> <b>Large firms</b> <b>NGOs</b> <b>Technology centres</b> <b>General population</b> <b>Policy makers</b>	<b>Academic institutions</b> <b>Business associations</b> <b>Large firms</b> <b>Technology centres</b> <b>General population</b> <b>Policy makers</b>
	<p>The PDP for Colombia focuses on formulating public policies within a framework of public-private partnerships, involving the government, companies, unions and other organisations in society. These public-private partnerships contribute to increasing the level of economic stability and wealth for the Colombian population.</p>	<p>The implementation of the policy contemplates the participation of different entities of the national government such as: (i) Ministry of Commerce, Industry and Tourism; (ii) Ministry of External relationships; (iii) Ministry of Science, Technology and Innovation; (iv) Ministry of Agriculture and Rural Development; (v) Ministry of Information Technologies and Communications, (vi) Ministry of Labor; (vii) Ministry of Transportation; and (viii) National Planning Department, among others. The policy horizon is five years between 2022 and 2027, with an approximate</p>	<p>The Chamber of Commerce of Bogotá, Connect Bogotá Región, Invest in Bogota, ProBogotá, the Private Competitiveness Council, the Mayorship of Bogotá, the Cundinamarca Regional Government, the Office of the President of Colombia, the Ministry of Commerce, Industry and Tourism, Fenalco, Confecámaras, Asomuña, the two Bogota Presidents' Forums, Red Vertice, Federesa, the Facatativá and Girardot Chambers of Commerce, Universidad Central and Universidad de San Buenaventura (chosen by the universities that make up Connect Bogotá) and the</p>



Policy type:		Sectoral policy	Broad policy	Broad policy
Policy name:		<a href="#">Productive Development Policy</a>	<a href="#">Internationalization policy for productive development</a>	<a href="#">Smart Specialization Strategy Bogota</a>
			implementation value of \$ 45,000 million.	Bogota, Cundinamarca and Boyaca offices of ANDI
<b>INSTRUMENTS</b> 	<b>Financial</b>	<b>Funding collaboration initiatives</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b> <b>Financing networking events</b> <b>Financing start-ups</b>	<b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b> <b>Application to labelling schemes and similar initiatives</b> <b>Financing networking events</b>	<b>Funding collaboration initiatives</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b> <b>Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)</b> <b>Financing start-ups</b> <b>Innovation: voucher, support to hire PhDs, cooperation with R&amp;I actors</b>
	<b>Technical assistance</b>	<b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b> <b>Support for soft skills development: coaching, management training, upskilling/reskilling</b> <b>Support for networking and partnership building (at national and/or international level)</b> <b>Marketing activities: advertising, communication, events, fairs, and so on</b>	<b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b> <b>Support for soft skills development: coaching, management training, upskilling/reskilling</b> <b>Support for networking and partnership building (at national and/or international level)</b>	<b>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</b> <b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b> <b>Support for soft skills development: coaching, management training, upskilling/reskilling</b>



Policy type:		Sectoral policy	Broad policy	Broad policy
Policy name:		<a href="#">Productive Development Policy</a>	<a href="#">Internationalization policy for productive development</a>	<a href="#">Smart Specialization Strategy Bogota</a>
			<b>Marketing activities: advertising, communication, events, fairs, and so on</b>	<b>Support for networking and partnership building (at national and/or international level)</b>
	<b>Explanation</b>	The PDP aims to develop and maintain business plans that work to increase economic growth and generate skilled jobs to increase productivity in the 18 sectors. There is also a focus on spurring entrepreneurship and growth of new sectors and firms.	The main responsible authorities are the Chamber of Commerce of Bogotá (CCB) and Connect Bogotá Region and with 8 other organisations make up the Directive Committee. There is also an Advisory Group with more than 500 participants, a Business Forum that guide the strategy, and tables of specialisation made up of public sector, the academy, scientific community, research centres, and civil society.	However, it should be noted that there are other interventions that, although not included in the PAS, contribute to achieving greater internationalisation of the economy.  In this way, the total financing of the policies that contribute to a greater internationalisation of the Colombian economy would amount to around 2.6 trillion pesos during the period between 2020 and 2031.
<b>HISTORY</b> 	<b>Period</b>	<b>Limited period</b>	<b>Limited Period</b>	<b>Limited Period</b>
	<b>Ending year</b> <i>(for policies with limited period)</i>	2025	2025	2027
	<b>Starting year</b>	2016	2013	2022
	<b>Explanation</b>	The PDP has outlined goals through 2025.	The Policy began in 2013 and has a projected end date of 2025.	The Internationalisation policy for productive development has outlined goals through 2027



Policy type:		Sectoral policy	Broad policy	Broad policy
Policy name:		<a href="#">Productive Development Policy</a>	<a href="#">Internationalization policy for productive development</a>	<a href="#">Smart Specialization Strategy Bogota</a>
<b>BUDGET</b> 	<b>Overall</b>	Data unavailable.	Data unavailable	\$45.000 mill
	<b>Annual</b>	Data unavailable.	Data unavailable	Data unavailable
	<b>Source of funding</b>	Funding for the policy comes from national government ministries, the Chambers of Commerce and National Council for Economic and Social Policy (CONPES) of Colombia.	Funding for the policy comes from: Chambers of Commerce and Connect Bogotá Región, Invest in Bogotá, ProBogotá, the Private Competitiveness Council, the Mayorship of Bogotá, and the Cundinamarca Regional Government.	Funding for the policy comes from Governments, the Chambers of Commerce and National Council for Economic and Social Policy (CONPES) of Colombia.
<b>POLICY EVALUATION</b> 	<b>Availability</b>	<b>No policy evaluation available</b>	<b>No policy evaluation available</b>	<b>No policy evaluation available</b>
	<b>Results</b>	As the policy is ongoing there are not definite results or evaluation.	No evaluation for this policy has been identified.	As the policy is ongoing there are not definite results or evaluation.
<b>POLICY ALIGNMENT WITH THE EU PRIORITIES</b> 		<b>Green Economy</b> <b>Digitalisation</b> <b>Resilience</b>	<b>Digitalisation</b> <b>Resilience</b>	<b>Digitalisation</b>

Source: ECCP (2023).



# 03

## State of cluster policy



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### 3. State of cluster policy

This section presents an overview of the state of play of Colombia 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 a detailed overview of the categories. The table below presents an overview of the **state of play for Colombia for 2023**.

**Table 2: State of play**

Colombia	State of play
<b>POLICY SCOPE</b>	Absence of cluster policy
	Broad policy
	Sectoral policy
	National and/or regional cluster policy
<b>CONTINUITY</b>	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
<b>EVIDENCE OF PERFORMANCE</b>	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
<b>CLUSTER SUPPORT INSTRUMENTS</b>	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 Colombia..

#### **Policy scope**

In terms of policy scope and approach the cluster policy in Colombia is characterised by a mix of industrial board policies and independent regional policies. The document explains one industrial broad policy, one sectoral policy focus on internalisation and the Smart Specialization Strategy of Bogota. There are no specific cluster policies at the national or regional levels in Colombia.

#### **Continuity**

There are no specific cluster policies at the national or regional levels in Colombia. The Productive Development Policy (which includes Smart Specialization Strategy Bogotá) is an attempt to enhance



the competitiveness agenda that was announced in 2012 and to ensure consistent economic growth in Colombia while recognising regional differences. The PDP has funded many cluster initiatives.

### **Evidence of performance**

At the moment, no evaluation or monitoring has been identified for the broad or sectoral cluster policies in Colombia.

### **Cluster support instruments**

The different instruments explained above aims to develop and maintain business plans that work to increase economic growth and generate skilled jobs to increase productivity. There is also a focus on spurring entrepreneurship and growth of new sectors and firms.

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Press Approved Internationalization Policy for Regional Productive Development  
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## Annex

**Table 3: Analytical framework for the state of cluster policy**

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

Source: ECCP (2023).