



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Austria

An initiative of the European Union





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Introduction

This document presents an overview of the cluster policy in Austria. 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 for Austria](#).

The European Semester is 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. Austrian clusters are a key tool for the successful and quick implementation of innovation projects. They can help to properly allocate the funds for economic value creation as well as manage funding schemes for SMEs. Although they are not directly mentioned in the National recovery and resilience plan¹, the Austrian investment premium, which has a link to the EU recovery and resilience facility (RRF), addresses cluster actors.

¹EC, Austria’s recovery and resilience plan https://ec.europa.eu/info/system/files/austria-recovery-resilience-factsheet_en.pdf

01

Industrial ecosystems and cluster landscape



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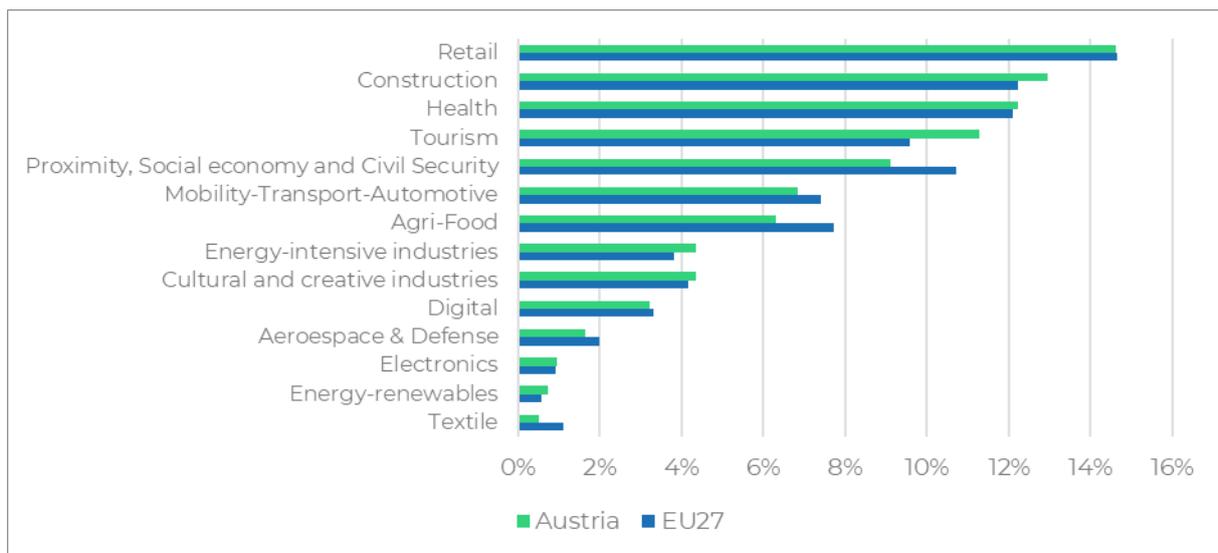
1. Industrial ecosystems and cluster landscape

This section will provide information on the national cluster organisations and statistical clusters in the country. The general cluster organisation landscape will show the geographical distribution of cluster organisations in the country registered under the ECCP, while the statistical clusters will display the top-performing clusters according to different measures of cluster strength (e.g. specialisation, size, productivity, dynamism, global frontier firms, high growth SMEs and gazelle firms).

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 55 in the country, while the second table is based on the 14 ecosystems, which total 7 in the country.

Table 1: Regionally relevant sectoral nodes

Region	Number of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
AT11: Burgenland	4	I55 - Accommodation	F43 - Specialised construction act.	C27 - Manuf. of electrical equipment	I56 - Food & beverage services	
AT12: Lower Austria	2	H51 - Air transport	C24 - Manuf. of basic metals			
AT13: Vienna	11	J63 - Information services	K65 - Insurance, pension funding	M73 - Advertising & market research	R90 - Arts & entertainment	L68 - Real estate
AT21: Carinthia	8	I55 - Accommodation	C26 - Manuf. of electronic & optical products	F42 - Civil engineering	C16 - Manuf. of wood products	C23 - Manuf. of other non-metal mineral products
AT22: Styria	7	C24 - Manuf. of basic metals	I55 - Accommodation	C26 - Manuf. of electronic & optical products	C27 - Manuf. of electrical equipment	M71 - Architecture, engineering
AT31: Upper Austria	7	C24 - Manuf. of basic metals	C28 - Manuf. of machinery & equipment	C27 - Manuf. of electrical equipment	C31 - Manuf. of furniture	C22 - Manuf. of rubber & plastic products
AT32: Salzburg	4	I55 - Accommodation	G47-Retail trade (not motor vehicles)	G45-Trade & repair of motor vehicles	K64 - Financial services	
AT33: The Tyrol	5	I55 - Accommodation	C21 - Manuf. of pharmaceuticals	C23 - Manuf. of other non-metal mineral products	C16 - Manuf. of wood products	C27 - Manuf. of electrical equipment
AT34: Vorarlberg	7	C13 - Manuf. of textiles	C25 - Manuf. of fabricated metal products	I55 - Accommodation	C22 - Manuf. of rubber & plastic products	C28 - Manuf. of machinery & equipment

Source: Own elaboration from Eurostat and National Statistical Offices

Table 2: Regionally relevant ecosystem nodes

Region	Number of nodes	Node 1	Node 2
AT11: Burgenland	0	-	-
AT12: Lower Austria	0	-	-
AT13: Vienna	2	Digital	Cultural and creative industries
AT21: Carinthia	1	Electronics	-
AT22: Styria	1	Electronics	-
AT31: Upper Austria	1	Energy-intensive industries	-
AT32: Salzburg	0	-	-
AT33: The Tyrol	1	Tourism	-
AT34: Vorarlberg	1	Textile	-

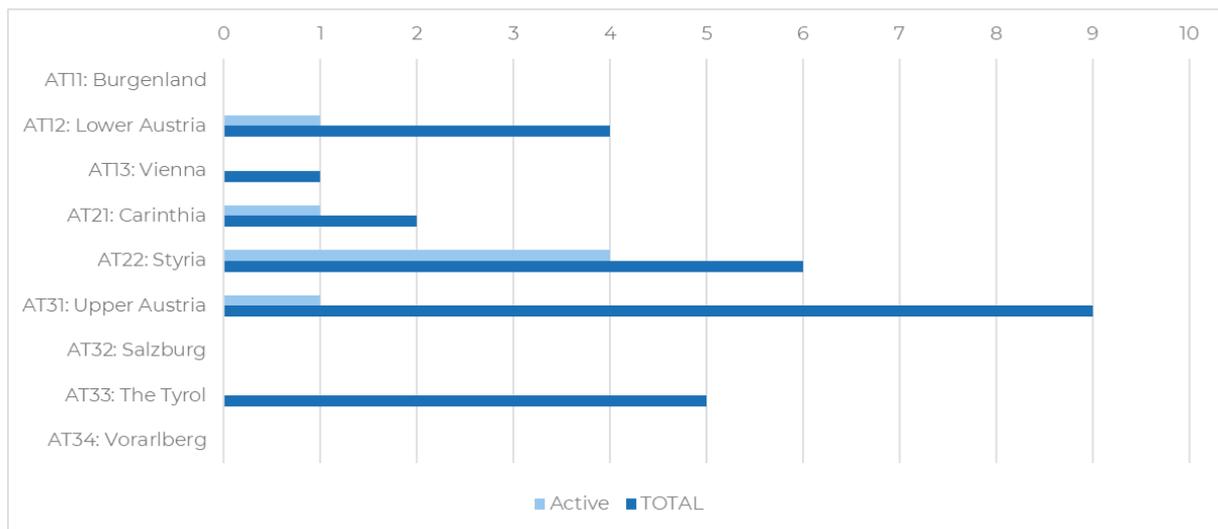
Source: Own elaboration from Eurostat and National Statistical Offices



Cluster organisations in the regions

There are 27 cluster organisations registered on the ECCP in the country, 7 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. According to the Austrian Federal Ministry for Digital and Economic Affairs, there are approximately 70 clusters in Austria, but these are not all registered in the ECCP.

Graph 2: Cluster organisations profiled and active on the ECCP



Source: Own elaboration from Eurostat and National Statistical Offices

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National cluster policy, programmes and initiatives



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2. National cluster policy, programmes and initiatives

Policy type:	National cluster policy	Regional cluster policy (example of Lower Austria)
Policy name:	<u>National Cluster Platform</u>	<u>Lower Austria Clusters and Networks Programme</u>
<p>POLICY OBJECTIVES</p> 	<p>Strengthening cooperation between companies or industry and RTDI actors</p> <p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Supporting internationalisation activities</p> <p>Enhancing the visibility of clusters</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Supporting cluster excellence and professionalisation of cluster management</p> <p>Supporting the consolidation of existing cluster organisations</p> <p>Promoting entrepreneurship, start-ups and spin-offs</p> <p>Promoting social and sustainable economy and other solidarity-based initiatives</p> <p>Promoting employment and upgrading skills and competences</p>	<p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Promoting employment and upgrading skills and competences</p> <p>Strengthening cooperation between companies or industry and RTDI actors</p> <p>Supporting cluster excellence and professionalisation of cluster management</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Supporting cluster excellence and professionalisation of cluster management</p> <p>Strengthening the network of cluster organisations/cross-clustering</p>



	<p>Strengthening the network of cluster organisations/cross-clustering</p> <p>Cluster analysis and support for policymaking</p>	
	<p>The main objective of the National Cluster Platform is to provide a platform whereby federal and regional cluster stakeholders develop joint initiatives and topics (Research, Technology and Innovation (RTI)). The platform supports activities such as internalisation of SMEs activities, research and innovation, Key Enabling Technologies and EU Cluster policy.</p>	<p>The policy's objectives are to promote innovation, entrepreneurial cooperation, ensure cluster excellence and professional management of clusters. Its objectives are also to identify and develop emerging topics with added value for the regional economy (Smart Specialisation).</p>
<p>POLICY FOCUS</p> 	<p>No specific focus</p> <p>The platform does not have a specific industry focus, however, focuses on cluster organisations at the regional and national level.</p>	<p>Cross-sectoral</p> <p>The Lower Austrian Cluster Programme currently supports 4 cluster initiatives in the region's fields of strength: green building, food, plastics and mechatronics</p>
<p>RESPONSIBLE AUTHORITIES</p> 	<p>In charge of drafting</p> <p>In charge of implementation</p> <p>Oversees the implementation</p> <p>Federal Ministry for Digital and Economic Affairs launched the National Cluster Platform in 2008. The Austrian National Cluster Platform represents the central interaction and cooperation platform for Austrian cluster stakeholders and is supported by the Austrian Federal Ministry for Digital and Economic Affairs. Austria has numerous high-performing clusters and networks in technological and economic fields of strength that enhance the national and international competitiveness of their cluster companies, especially SMEs, through innovation and cooperation.</p> <p>Within the framework of the National Cluster Platform, current cluster-relevant trends, technologies and location topics are</p>	<p>In charge of implementation</p> <p>Oversees the implementation</p> <p>The programme owner of is the Regional Government of Lower Austria. The Lower Austrian business agency implements the programme. The cluster managers and their teams are employees of ecoplus. The programme is co-funded by ERDF and regional funds.</p>



	<p>addressed and joint projects are initiated. The federal activities are intended to support the measures in the states and strive to have a complementary effect. The dialog between cluster stakeholders contributes to the successful interaction of science, research and business and to the strengthening of innovation, internationalisation and growth in domestic companies. This is also an important concern of the Austrian federal government.</p> <p>The Austrian National Cluster platform is funded entirely by the Austrian Federal government. However, funding for Austrian clusters is provided by different government agencies at different levels of government including the European Union.</p>		
<p>BENEFICIARIES</p> 	<p>SMEs</p> <p>Research organisations</p> <p>Academic institutions</p> <p>Start-ups</p> <p>Business associations</p> <p>Technology centres</p> <p>Cluster organisations</p> <p>NGOs</p>	<p>SMEs</p> <p>Research organisations</p> <p>Academic institutions</p> <p>Start-ups</p> <p>Cluster organisations</p> <p>Large firms</p>	
	<p>Organisations invited to participate in the National Cluster Platform includes 1) Cluster and Cluster Networks that are member-open, non-profit, and focus on economic, research and innovation policies, as well as focus on international competitiveness. Members should include SMEs, research institutions, and academic institutions. 2) Cluster and Cluster Networks supporting organisations. 3) Public institutions and institutions that put a focus on RTI policies.</p>	<p>The Lower Austrian Cluster Programmes provides support for management. The final beneficiaries are actors in the regional innovation ecosystem, most of all companies. The programme does not provide financial support for projects or investment of companies.</p>	
	<p>Financial</p>	<p>Funding collaboration initiatives</p>	<p>Cluster management</p>



 INSTRUMENTS		
	<p>Support to R&D projects, SMEs becoming cluster members, etc.</p> <p>Subsidies to hire personnel</p> <p>Subsidies for cluster infrastructure (e.g. offices, equipment)</p> <p>Financing networking events</p>	
Technical assistance	<p>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</p> <p>Support for soft skills development: coaching, management training, upskilling/reskilling</p> <p>Support for networking and partnership building (at national and/or international level)</p> <p>Marketing activities: advertising, communication, events, fairs, and so on</p> <p>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</p>	<p>Support for networking and partnership building (at national and/or international level)</p> <p>Support for cluster management excellence (training, labelling)</p>
Explanation	<p>The National Cluster Platform itself offers technical assistance for cluster management. However, the National Cluster Platform does not always provide direct financing. The Platform supports the involvement of funding agencies at different levels of government (European, National, and State). For example, SFG (a state agency), funds SMEs and cluster collaborative projects, cluster infrastructure, while Austrian promotional bank funds start-ups, and business expansions. The National Cluster Platform funds</p>	<p>The Lower Austrian Cluster Programmes provides support for cluster management. The final beneficiaries are actors in the regional innovation ecosystem, most of all companies. The programme does not provide financial support for projects or investment of companies.</p>



		itself several activities from collaborative initiatives to workshops and events.	
 HISTORY	Period	Limited period	Limited period
	Ending year <i>(for policies with limited period)</i>		2021 (New Cluster Programme 2022-2027 in preparation)
	Starting year	2008	2007
	Explanation	The platform was launched in 2008 by the Federal Ministry for Digital and Economic Affairs, Research and Economy, however, the contract for the Austrian National Cluster Platform is renewed on a biannual basis. The next period starts in 2021 and lasts until the end of 2022. In addition to this, there are a variety of funding agencies involved in the program at the federal and state level that offer additional funding.	The Lower Austrian Cluster Programme was launched in 2007 (2007-2014) and renewed in 2015 (2015-2021). The new Cluster Programme Lower Austria 2022-2027 is currently under preparation.
 BUDGET	Overall	Data unavailable	EUR 22 million
	Annual	Data unavailable	Data unavailable
	Source of funding	The Austrian National Cluster platform is funded entirely by the Austrian Federal government. However, funding for Austrian clusters is provided by different government agencies at different levels of government including the European Union.	40%- Lower Austria: Regional Competitiveness and Employment, 50%- European Regional Development Fund (ERDF), 10%-Membership fees and sponsorship



<p>POLICY EVALUATION</p> 	<p>Availability</p>	<p>in-itinere</p>	<p>in-itinere</p>
	<p>Results</p>	<p>The National Cluster Platform has greatly encouraged innovation in Austria. As of 2020, there are more than 100 innovation infrastructures operating in the country. The country also operates over 20 technology parks. Through the Cluster Platform a follow up programme Innovative Upper Austria was launched in 2010, which sees a total investment of EUR 600 million between 2005 and 2010. The five fields for investments are mechatronics, ICT, life science, innovative materials and logistics.</p>	<p>The programme has generated the following results so far- over 584 cluster partners and 90,000 cluster partner employees participating in the programme. There have been 879 cooperation projects and approximately 4,600 total partners in cooperation projects.</p>
<p>POLICY ALIGNMENT WITH THE EU PRIORITIES</p> 	<p>Green Economy</p> <p>Digitalisation</p> <p>Social inclusion</p>	<p>Green Economy</p> <p>Digitalisation</p> <p>Social inclusion</p>	

03

State of play of cluster policy



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3. State of play of cluster policy

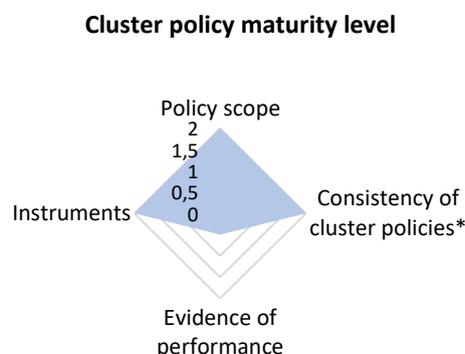
The data below illustrates how the country ranks in terms of maturity of cluster policy. The maturity index is based on a combination of factors presented in Chapter 2 and which are scored based on their existence:

- **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 and 2021). 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.

	Austria	Maximum score
Policy scope	2	2
Consistency of cluster policies*	2	2
Evidence of performance	0,5	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

Policy evaluation (for terminated policies)	Availability of evaluations for terminated policies <p>In Austria, cluster policy is regional policy, i.e. the development and facilitation of cluster initiatives is financed regionally and based on regional strategies. In Lower Austria, for example, on the basis of the Lower Austrian Economic Strategy as integral part of the region's innovation and smart specialisation strategy. Monitoring and evaluation are therefore also carried out regionally. In Lower Austria, for example, the Regional Government Department Economy as programme owner and ecoplus as programme implementing body monitor key performance indicators measuring the clusters' contribution to the Economic Strategy's objectives on a biannual basis</p>
Policy approach in the country	Policy support for the activities of cluster organisations Cluster approach used directly by national/regional development agencies Broad-based framework policies to support cooperation effectiveness Specific policies to support cooperation projects
Continuity	<p>The first cluster in Austria was the automotive cluster (ACstyria) which was set up in 1995 in Styria. Since then, clusters development has grown rapidly in Austria. The different regions in Austria have their own cluster policies, for example, Lower Austria has the Lower Austria Clusters and Networks Programme, which was initially launched in 2007. Upper Austria has the Innovation Upper Austria programme developed to stabilize and further develop clusters in the region, this was launched in 2010.</p> <p>Due to the growing number of clusters and cluster networks in the country, The National Austrian Cluster Platform was set up by the Federal Ministry for Digital and Economic Affairs in 2008 to encourage collaboration between various federal and state stakeholders. The National Austrian Cluster Program has been ongoing since 2008 and now has over 70 clusters and networks involved in the programme.</p>
Consistency	> 10 years (but with clear continuity) <p>The National cluster programme has been in operation since 2008. In Austria, different regions also have their own cluster policies and initiatives. 1) Upper Austria- "Innovative Upper Austria" initially launched in 2005, policy has since been expanded upon. 2) Lower Austria- "Clusters and Networks" Programme was initially launched in 2007, policy has also been extended. 3) Salzburg- Economic Policy Guidelines of federal state of Salzburg, launched initially in 2004. 4) Tyrol- Cluster Initiative launched in 2003. 5) Styria- Guidelines for technology policy in Styria. 6) Vorarlberg- Economic Guidelines of Vorarlberg. Lower Austria was selected because of the diversity of cluster organisations and collaboration projects included in the policy. It was also one of the 12 regional cluster programmes examined in the European Cluster Observatory Report.</p>

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