



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

# Country factsheet

Austria

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 Austria. Given the importance of contextualising 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 2023 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. Chapter 4.2 provides an overview on how Austria's cluster policy can help to tackle the economic policy challenges identified in the European Semester country recommendations.

As a consequence of the COVID-19 pandemic, European as well as global economies have been subject to severe output losses. In response, policymakers at EU and national level have acted decisively and made very significant financial resources available to tackle the threat of a prolonged downturn. This was carried out through the Recovery and Resilience Facility, [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 in properly allocating 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 plan<sup>1</sup>, the Austrian investment premium, which has a link to the EU recovery and resilience facility (RRF), addresses cluster actors. In addition to the COVID-19 pandemic, the ongoing Russian military aggression against Ukraine has also taken its toll on EU companies and industrial ecosystems, highlighting the significance of policy efforts in supporting SMEs and clusters.

The [Partnership Agreement with Austria – 2021-2027](#) makes a clear reference to clusters. Based on the agreement, cluster and networks support the development of transnational partnership associations, cooperative relationships and particularly SMEs. Cluster development aims to strengthen regional innovation ecosystems and improve their international integration. This is expected to enhance synergies between programmes that operate on regional, national, and European levels. In the [Austrian ERDF Operational Programme 2021-2027](#), Cluster organisations are directly mentioned. For instance, measure 1.3 “Designing attractive regional innovation ecosystems” mentions that through clusters, platforms or specialised intermediary institutions, supplementary innovation services are to be provided for companies that strengthen the innovation capacity of SMEs, introduce them to systematic R&D activities and support them in (digital) transformation processes. Cluster organisations are the main beneficiaries of this measure.

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

- 1) an overview of the industrial ecosystems and cluster landscape in Austria,
- 2) an overview of the national cluster policy and an insight into the regional cluster policy,

<sup>1</sup> Austria's recovery and resilience plan [https://commission.europa.eu/system/files/2021-06/austria-recovery-resilience-factsheet\\_en.pdf](https://commission.europa.eu/system/files/2021-06/austria-recovery-resilience-factsheet_en.pdf)



- 3) an assessment of the state of play of Austrian cluster policy and its role in broader economic policy challenges mentioned in the European Semester Reports.



02

## Industrial ecosystems and cluster landscape







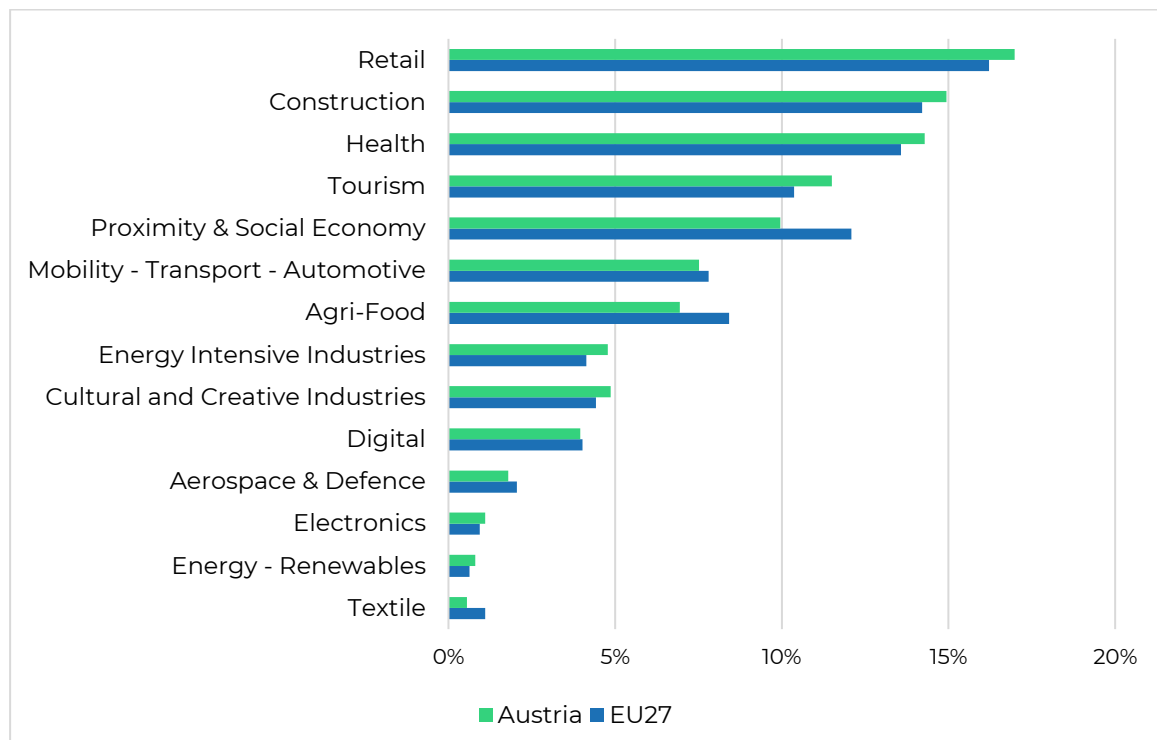
## 2. Industrial ecosystems and cluster landscape

### 2.1 Employment in the 14 industrial ecosystems

As part of its Industrial Strategy (March 2020), the European Commission has identified 14 industrial ecosystems that encompass all players operating in a value chain.<sup>2</sup> The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2 -digit activities, following the methodology established in the European Commission.<sup>3</sup> This means that the data provided below can differ from other publications by the European Commission that do not consider the industrial ecosystem classification.

In Figure 1, the employment share of Austria and the EU27 on average in each industrial ecosystem is shown relative to the number of employed persons in the 14 industrial ecosystems. 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. Here, the three main ecosystems by employment for Austria are “Retail”, “Construction” and “Health”. In these three industrial ecosystems as well as in “Tourism” Austria displays employment shares above the EU27 average which indicates the relative strength of the country in those industrial ecosystems.

**Figure 1: Employment across the industrial ecosystems**



Source: ECCP (2023), own elaboration from Eurostat.

<sup>2</sup> for more information, see <https://clustercollaboration.eu/in-focus/industrial-ecosystems> (last access 09.01.2023).

<sup>3</sup> see European Commission (2021): Annual Single Market Report, SWD(2022).





## 2.2 Regionally agglomerations

Economic activity is not equally distributed across regions in the EU but tends to agglomerate in certain places. In this context, an Agglomeration is defined as the concentration of a certain industry, sector or ecosystem in a certain geographical area. The following section provides an analysis of, first, the sectoral agglomerations and, second, the ecosystem agglomerations in the regions. Agglomerations are operationalised through the employment-based Location Quotients (LQ), measuring the relative specialisation of one region compared to the EU level, as well as the employment size.

If the LQ for a given activity-region combination is above 1.5, it is considered an agglomeration, and if the activity accounts for at least 1 % of total employment in the region, it is considered regionally relevant.<sup>4</sup> The following tables show the total number of regionally relevant agglomerations in each region in the country and identifies the top five most specialised of these agglomerations. The first table focuses on the 88 NACE 2-digit activities or sectors, totalling 42 in the country, while the second table is based on the 14 ecosystems, which total 10 in the country.

**Table 1: Number of regionally relevant sectoral agglomerations and Top 5 agglomerations by region (NACE)**

Region	Number of agglomerations	Agglomeration 1	Agglomeration 2	Agglomeration 3	Agglomeration 4	Agglomeration 5
<b>AT11: Burgenland</b>	3	I55 - Accommodation	C27 – Manuf. of electrical equipment	F43 - Specialised construction activities		
<b>AT12: Lower Austria</b>	2	C24 – Manuf. of basic metals	G45 – Wholesale & retail trade & repair of motor vehicles			
<b>AT13: Vienna</b>	7	J63 - Information services	M73 - Advertising & market research	L68 - Real estate activities	K64 – Financial service activities	M70 – Activities of head offices
<b>AT21: Carinthia</b>	4	C26 – Manuf. of computer, electronic & optical products	I55 - Accommodation	C16 – Manuf. of wood and wood products	C28 – Manuf. of machinery and equipment	
<b>AT22: Styria</b>	6	C24 - Manufacture of basic metals	C26 - Manufacture of computer, electronic & optical products	I55 - Accommodation	C29 – Manuf. of motor vehicles, trailers & semi-trailer	C28 - Manuf. of machinery & equipment
<b>AT31: Upper Austria</b>	7	C24 - Manuf. of basic metals	C28 - Manuf. of machinery & equipment	C27 - Manuf. of electrical equipment	C31 - Manuf. of furniture	C20 - Manuf. of chemicals & chemical products
<b>AT32: Salzburg</b>	3	I55 - Accommodation	C16 – Manuf. of wood and wood products)	K64 – Financial service activities		
<b>AT33: The Tyrol</b>	4	I55 - Accommodation	C21 - Manuf. of pharmaceuticals	C16 – Manuf. of wood and wood products	C27 - Manuf. of electrical equipment	C13 - Manuf. of textiles
<b>AT34: Vorarlberg</b>	6	C13 - Manuf. of textiles	C25 - Manuf. of fabricated metal products	I55 - Accommodation	C28 - Manuf. of machinery & equipment	C22 - Manuf. of rubber & plastic products

Source: ECCP (2023), own elaboration from Eurostat.

As mentioned at the beginning of this Chapter, the NACE 2-digit activities have been aggregated to the 14 EU industrial ecosystems following the methodology established by the European Commission. Table 2 provides an overview of the regional distribution of industrial ecosystem agglomerations.

<sup>4</sup> for more information on the methodology please see the methodology note: <https://clustercollaboration.eu/in-focus/policy-acceleration/country-factsheets-on-cluster-policies-and-programmes> (last access 09.01.2023).



Overall, there are fewer numbers of ecosystem agglomerations compared to the regionally relevant sectoral agglomerations by NACE sectors. This more concentrated agglomeration can at least partially be linked to the methodology of measurement of the 14 industrial ecosystems.

For the capital region of Vienna (AT13), sectors such as information services (J63), advertising & market research (M73) and computer programming and consultancy (J62) are among the most relevant agglomerations (NACE) which is also reflected in the regions relevant industrial ecosystem agglomerations Digital and Cultural and creative industries. Several Austrian regions have singular industrial ecosystem agglomerations in electronics or tourism, with the heavily industrialised region of Vorarlberg (AT34) standing out in particular with three ecosystem agglomerations in Textile, Electronics, and Energy-Renewables which are also reflected in its sectoral NACE agglomerations of manufacturing of textiles (C13), machinery and equipment (C28) and electrical equipment (C28).

**Table 2: Regionally relevant ecosystem agglomerations by region**

Region	Number of ecosystem agglomerations	Agglomeration 1	Agglomeration 2	Agglomeration 3
<b>AT11: Burgenland</b>	0	-	-	-
<b>AT12: Lower Austria</b>	0	-	-	-
<b>AT13: Vienna</b>	2	Digital	Cultural and creative industries	-
<b>AT21: Carinthia</b>	1	Electronics	-	-
<b>AT22: Styria</b>	1	Electronics	-	-
<b>AT31: Upper Austria</b>	2	Energy-intensive industries	Energy – Renewables	-
<b>AT32: Salzburg</b>	0	-	-	-
<b>AT33: The Tyrol</b>	1	Tourism	-	-
<b>AT34: Vorarlberg</b>	3	Textile	Electronics	Energy – Renewables

Source: ECCP (2023), own elaboration from Eurostat.

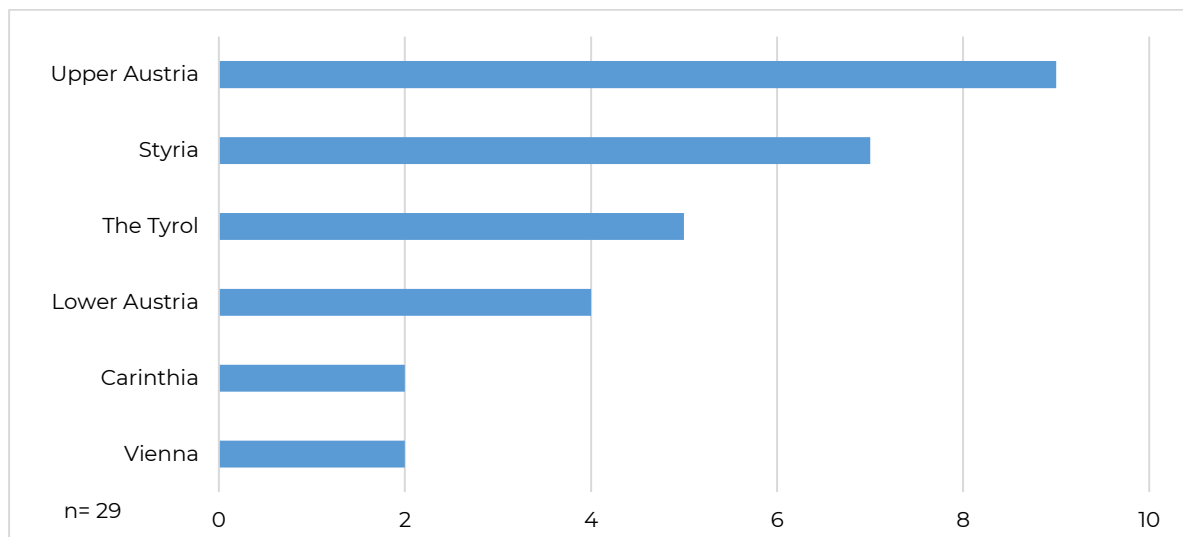


## 2.3 Cluster organisations & interregional cooperation

### Cluster organisations in the regions

There are 29 cluster organisations registered on the ECCP coming from Austria. 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 which are mapped at [ClusterkarteWeb \(clusternetworking.gv.at\)](https://clusterkarte.gv.at/)<sup>5</sup>, but not all of them are registered in the ECCP. The majority of the registered cluster organisations on the ECCP are located in Upper Austria (nine cluster organisations) followed by Styria (seven cluster organisations) and Tyrol (five cluster organisations). The following figure shows the presence of cluster organisations in the different regions.

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



Source: ECCP (2023). Note: the data for the analysis was extracted on 21/12/2023.

SMEs (77%, EU: 83%) followed by large enterprises (14%, EU: 9%) and research organisations (9%, EU:8%) constitute the majority of member organisations of Austrian cluster organisations with profiles on the ECCP. From a thematic perspective, these Austrian cluster organisations are operating in the following industrial ecosystems. Since cluster organisations on the ECCP can be allocated to multiple industrial ecosystems, the number of cluster organisations with by industrial ecosystem can be higher than the overall number of cluster organisations in the country.

- Agri-food (5 cluster organisation)
- Construction (4 cluster organisation)
- Electronics (4 cluster organisation)
- Digital (3 cluster organisation)
- Health (3 cluster organisations)
- Renewable Energy (3 cluster organisation)
- Mobility-Transport-Automotive (2 cluster organisation)
- Aerospace & Defence (1 cluster organisation)

<sup>5</sup> [ClusterkarteWeb \(clusternetworking.gv.at\)](https://clusterkarte.gv.at/)



- Energy Intensive Industries (1 cluster organisation)
- Proximity & Social Economy (1 cluster organisation)

### **Interregional cooperation**

In the 2014-2020 funding period<sup>6</sup>, the European Cluster Partnerships and the INNOSUP-1 initiative have been launched by the European Commission to encourage clusters from Europe to intensify collaboration across regions and sectors. Austrian cluster organisations have been involved in eight consortia of the European Strategic Cluster Partnerships out of which five partnerships were focusing on internationalisation (ESCP-4i) and three partnerships were on cluster management excellence (ESCP-4x). Consortia partners came from 13 different EU member states (FR, FI, PT, ES, LV, LT, DE, DK, BE, SE, IT, CZ, RO). Eight Austrian cluster organisations participated in the INNOSUP-1 initiative with partner organisations coming from 11 countries (DE, NO, BE, EL, ES, EE, PT, PL, SI, FI, LT).

In the 2021-2027 funding period, the Single Market Programme supports clusters as part of the Joint Clusters Initiatives (Euroclusters) for Europe's recovery. From Austria, four clusters are part of five Euroclusters with partners from 12 countries (Slovakia, Italy, Spain, Romania, Bulgaria, France, Poland, Czechia, Netherlands, Sweden, Germany, Portugal). These Euroclusters are AEC Eurocluster, DESIRE, RESIST, SILEO and Silicon Eurocluster. Collectively, they cover six industrial ecosystems, with "Mobility, transport and automotive", "Construction", "Health", "Culture, creative culture industries", "Retail" and "Electronics".<sup>7</sup>

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<sup>6</sup> Many of the programmes of the 2014-2020 funding period have been terminated by December 2023. However, the collaborative projects that were funded may continue to operate.

<sup>7</sup> For more information on the Euroclusters see: <https://clustercollaboration.eu/euroclusters> (last access on 21.03.2023)



# 03

## National cluster policy, programmes and initiatives



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### 3. National cluster policy, programmes and initiatives

In this section, we provide an overview of the existing Austrian cluster policies on a national as well as an example of the regional level cluster 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 an Austrian national cluster policy, whilst the third represents an exemplary regional cluster policy in Austria. This factsheet showcases a new example of a regional cluster policy in Austria for the region of Upper Austria. To gain an insight into Austrian regional policy in Lower Austria and Tyrol that were outlined in the previous factsheets of 2021 and 2022, one can follow these links: [Country Factsheet 2021](#) & [Country Factsheet 2022](#).

In Austria, different public authorities and cluster management organisations implement federal and provincial cluster support programmes. In total, more than 80 cluster organisations are recorded in Austria. On the federal level, the Austrian Federal Ministry of Labour and Economy provides with the Austrian cluster platform the central knowledge and exchange platform since 2008. On the regional level, cluster policies are implemented by regional public authorities and regional cluster management organisations. According to the Austrian cluster platform, the following 12 organisations implement regional / provincial cluster policies in the 9 different Austrian regions.

1. Business Upper Austria: Standortagentur des Landes Oberösterreichs (biz-up.at) / Oberösterreichischer Energiesparverband (Upper Austria)
2. eco plus Niederösterreichs Wirtschaftsagentur GmbH (Lower Austria)
3. Handelsverband Österreich
4. Innovation Salzburg GmbH (Salzburg)
5. Kärntner Wirtschaftsförderungsfonds (Carinthia)
6. SFG Steirische Wirtschaftsförderungsgesellschaft mbH (Styria)
7. Standortagentur Tirol (Tyrol)
8. Wirtschaft Burgenland GmbH (Burgenland)
9. Wirtschaftsagentur Wien (Vienna)
10. Wirtschaftskammer Österreich
11. Wirtschafts-Standort Vorarlberg GmbH (Vorarlberg)





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

**Table 3: Overview of Austrian cluster policy**


Policy type:	National cluster policy	Regional cluster policy (example of Upper Austria)
Policy name:	Austrian cluster platform	Upper Austrian cluster programme
<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>Fostering innovation and strengthening innovation ecosystems</b> <b>Supporting cluster excellence and professionalisation of cluster management</b> <b>Supporting the consolidation of existing 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>Strengthening the network of cluster organisations/cross-clustering</b> <b>Cluster analysis and support for policymaking</b>	<b>Strengthening cooperation between companies or industry and RTDI actors</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>Fostering innovation and strengthening innovation ecosystems</b> <b>Supporting cluster excellence and professionalisation of cluster management</b> <b>Promoting employment and upgrading skills and competences</b> <b>Strengthening the network of cluster organisations/cross-clustering</b>





Policy type:	National cluster policy	Regional cluster policy (example of Upper Austria)
Policy name:	Austrian cluster platform	Upper Austrian cluster programme
	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.	The Upper Austrian cluster programme, implemented by the business agency of Upper Austria "Business Upper Austria". The main objectives are to further support the transfer of knowledge and skills, provide dedicated (market) information, increase (cross-sectoral) networking, stimulate cooperation and to facilitate access to new markets.
<b>POLICY FOCUS</b> 	<b>Cross-sectoral</b>	<b>Cross-sectoral</b>
	<p>The platform has a thematic focus on different sectors. For 2022, the following topics were in the focus:</p> <ul style="list-style-type: none"> <li>• Digitalisation of industrial production</li> <li>• Energy and mobility transition</li> <li>• Green Tech &amp; Green Materials</li> <li>• Technology leadership</li> <li>• Expansion of digital business models</li> <li>• Life Science &amp; Biotech</li> <li>• Quality of life, creativity and art</li> </ul>	The thematic focus of the eight Upper Austrian cluster organisations and the two networks are automotive, mechatronics, cleantech, medicine, ICT, construction, plastics, food, hydrogen and logistic.
<b>RESPONSIBLE AUTHORITIES</b> 	<b>In charge of drafting</b>	<b>In charge of drafting (Upper Austrian regional government)</b>
	<b>In charge of implementation</b>  <b>Oversees the implementation</b>	<b>In charge of implementation (Business agency "Business Upper Austria")</b>  <b>Oversees the implementation (Business agency "Business Upper Austria")</b>




Policy type:	National cluster policy	Regional cluster policy (example of Upper Austria)
Policy name:	Austrian cluster platform	Upper Austrian cluster programme
	<p>The 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 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>The drafting of the Upper Austrian cluster programme is done by the regional Upper Austrian government. The programme itself is implemented by the regional business agency "Business Upper Austria". "Business Upper Austria" acts as an innovation driver and the first point of contact for companies from Austria and abroad, offering them tailor-made solutions for their investment and innovation projects. The business agency employs a cluster team who oversee the activities of the eight clusters and two partner networks in Upper Austria.</p>
<b>BENEFICIARIES</b> 	<b>SMEs</b> <b>Cluster organisations</b> <b>Research organisations</b>	<b>SMEs</b> <b>Cluster organisations</b> <b>Research organisations</b>



Policy type:		National cluster policy	Regional cluster policy (example of Upper Austria)
Policy name:		Austrian cluster platform	Upper Austrian cluster programme
<b>INSTRUMENTS</b> 		<b>Academic institutions</b> <b>Start-ups</b> <b>Business associations</b> <b>Technology centres</b> <b>NGOs</b>	<b>Academic institutions</b> <b>Start-ups</b> <b>Large firms</b>
		Organisations invited to participate in the National Cluster Platform include 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.	The regional business agency “Business Upper Austria” targets stakeholders of the local economy and science. The local clusters and networks are the key target group. Funding (e.g., for cooperation projects) is also provided via the programme “SKU”. At least one cooperation partner of this funding programme has to be a member of one of the cluster organisations of Upper Austria.
	<b>Financial</b>	<b>Funding collaboration initiatives</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b> <b>Subsidies to hire personnel</b> <b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b> <b>Financing networking events</b>	<b>Funding collaboration initiatives</b>
	<b>Technical assistance</b>	<b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b>	<b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b>





Policy type:		National cluster policy	Regional cluster policy (example of Upper Austria)
Policy name:		Austrian cluster platform	Upper Austrian cluster programme
		<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>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</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>
	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 itself several activities from collaborative initiatives to workshops and events.</p>	<p>The business agency “Business Upper Austria” offers different support measures. These include:</p> <ul style="list-style-type: none"> <li>• Collecting and processing industry-relevant information</li> <li>• Press and public relations work</li> <li>• Knowledge transfer through events, training courses and workshops</li> <li>• Demand-oriented qualification and further education through specific training courses and seminars</li> <li>• Exchange of experience</li> <li>• Cooperation projects</li> <li>• Sales and internationalisation activities</li> </ul>
<b>HISTORY</b>  	Period	Limited period	Data unavailable
	Ending year <i>(for policies)</i>	Data unavailable	Data unavailable



Policy type:		National cluster policy	Regional cluster policy (example of Upper Austria)
Policy name:		Austrian cluster platform	Upper Austrian cluster programme
	<i>with limited period)</i>		
	<b>Starting year</b>	2008	2015
	<b>Explanation</b>	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 2023 and lasts until the end of 2024. The National Cluster Platform itself funds several activities from collaborative initiatives to workshops and events. 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 Upper Austrian cluster policy has already long tradition with its regional cluster programme that can be traced back to the early 2000s. After some reorganisations, the current agency "Business Upper Austria" is overseeing the regional cluster policy since 2015.
<b>BUDGET</b> 	<b>Overall</b>	Data unavailable	Data unavailable
	<b>Annual</b>	Data unavailable	Data unavailable
	<b>Source of funding</b>	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.	Funding is provided via the Upper Austrian regional government.
	<b>Availability</b>	<b>in-itinere</b>	<b>No policy evaluation</b>



Policy type:		National cluster policy	Regional cluster policy (example of Upper Austria)
Policy name:		Austrian cluster platform	Upper Austrian cluster programme
<b>POLICY</b>  <b>EVALUATION</b>	<b>Results</b>	<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>	No policy evaluation available
	<b>POLICY ALIGNMENT WITH THE EU PRIORITIES</b> 	<b>Green economy</b> <b>Digitalisation</b> <b>Resilience</b>	<b>Green Economy</b> <b>Digitalisation</b> <b>Resilience</b>



# 04

## State of cluster policy and its role in broader economic policy challenges







## 4. State of cluster policy and its role in broader economic policy challenges

### 4.1 The state of cluster policy

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

**Table 4: State of play**

Austria	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 Austria.

#### **Policy scope**

In terms of policy scope and approach the cluster policy in Austria is characterised by its federal approach of having a mix of national coordination of clusters through the national cluster platform and independent regional policies in the nine different regions. Thus, the development and facilitation of cluster initiatives is financed regionally and based on regional strategies. In Tyrol, for example, on



the basis of the Tyrolean innovation and economic strategy, the cluster policy is seen 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.

### **Continuity**

The first cluster in Austria was the automotive cluster (ACstyria) which was set up in 1995 in Styria. Since then, cluster 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 stabilise and further develop clusters in the region, this was launched in 2010.

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 80 clusters and networks involved in the programme.

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. Tyrol has been selected as an example because it has one of the most mature cluster policies of Austria.

### **Evidence of performance**

At the moment, no evaluation is available for the Austrian cluster platform. However, a report was published in 2007 presenting [15 years of cluster policy in Austria](#). In addition, the National Austrian Cluster Platform organised six working groups ("national innovation system", "cluster praxis", "EU policy", "internationalisation", "digitisation" and "environmental and energy research") which are regularly addressing and monitoring specific, innovative and relevant topics and challenges.

### **Cluster support instruments**

The [Austrian Cluster Platform](#) offers different financial and technical support instruments on a national level. As part of the financial support instruments related to clusters, the Austrian government supports e.g. the [Competence Centers for Excellent Technologies](#). In addition, the Cluster Platform acts as a networking platform for all Austrian clusters by awarding once per year the National cluster award to successful clusters and by organising the yearly cluster conference. Moreover, the platform gathers information on current cluster topics and Austrian cluster can showcase their success stories on the platform.



## **4.2 Cluster policy's potential impact on challenges identified in the European Semester Report**

Cluster policy can provide important support to broader economic policy efforts. This section shows how Austrian cluster policy can play a role in addressing the challenges identified in the European



Semester Report for the country. To this end, the European Semester 2023 country report for Austria<sup>8</sup> has been analysed across policy areas relevant to cluster policy. The results point to a series of issues where cluster policy can play an important role in tackling the country's economic challenges.

**Table 5: Contribution of Austrian cluster policy to the challenges identified in the European Semester Reports**

Policy area	Challenges	Cluster policy
<b>SKILLS</b> 	<ul style="list-style-type: none"> <li>Promote skills needed for the green transition</li> </ul>	<p>The Austrian cluster policies that are in the focus of this factsheet also focus on promoting employment and upgrading skills and competences and in this regard includes trainings in hard and soft skill development.</p> <p>For instance, the business agency of Upper Austria “Business Upper Austria” which is responsible for the Upper Austrian cluster programme offers qualification and further training programmes for employees and managers.<sup>9</sup></p> <p>Research underlines the role of clusters in developing the skills of the workforce and attracting skilled workers to a region.<sup>10</sup></p>
<b>GREEN TRANSITION</b> 	<ul style="list-style-type: none"> <li>Accelerate the deployment of renewable energy</li> <li>Accelerate the phasing-out of fossil fuels for heating buildings</li> <li>Increasing energy efficiency in buildings</li> </ul>	<p>The Austrian cluster platform has several focal points (e.g., Energy and mobility transition and Green Tech &amp; Green Materials) that are relevant for the green transition and the recommendations from the European Semester Reports.</p> <p>As an illustrative example, the activities of the cluster <a href="#">E.C.E.X.A</a> which operates in the sector of environmental technologies can be mentioned. This cluster was awarded for its work on new approaches in cooling technology that increase energy efficiency and CO<sub>2</sub>-neutral heating.<sup>11</sup> Moreover, <a href="#">Renowave</a> is a dedicated Austrian cluster organisation for sustainable, climate-neutral refurbishments. Studies also show that clusters can play a vital role in the green transition of the economy.<sup>12</sup></p> <p>In addition, it can be underlined that cluster organisations can have a positive influence on the green transition, not least because they facilitate exchange between different actors, disseminate relevant knowledge and practices and deepen environmental awareness among stakeholders.<sup>13</sup></p>

<sup>8</sup> [https://economy-finance.ec.europa.eu/document/download/660a0680-2fdf-44d0-a7ed-64c9c42bb7d2\\_en?filename=AT\\_SWD\\_2023\\_620\\_en.pdf](https://economy-finance.ec.europa.eu/document/download/660a0680-2fdf-44d0-a7ed-64c9c42bb7d2_en?filename=AT_SWD_2023_620_en.pdf) (last access 15.05.2024)

<sup>9</sup> <https://www.biz-up.at/koooperation/unserecluster> (last access 06.05.2024)


<sup>10</sup> Hsu et al. (2014).

<sup>11</sup> <https://www.bmaw.gv.at/Themen/Wirtschaftsstandort-Oesterreich/ClusterplattformOesterreich/Cluster-Erfolge/Kurzbeitraege-der-Cluster-Erfolge/Heizung-der-Zukunft.html> (last access 07.03.2024)

<sup>12</sup> Lis and Mackiewicz (2023), ECCP (2021).

<sup>13</sup> Hatch et al. (2017).



Policy area	Challenges	Cluster policy
<b>RESILIENCE AND ECONOMIC SECURITY</b> 	<ul style="list-style-type: none"> <li>• Reduce dependence of fossil fuels</li> <li>• Diversify towards non-Russian energy supplies</li> </ul>	<p>The Austrian cluster policy supports internationalisation and collaboration which are elements for diversifying the supplier base. For instance, the Austrian internationalisation offensive “go-international” which supports the international cooperation of Austrian clusters and businesses can be highlighted.<sup>14</sup></p> <p>As clusters are central in linking regional economies to global value chains, they are also crucial in efforts to diversify and/or reshore value chains and production networks.<sup>15</sup> Studies show the important role of cluster policy in the energy sector<sup>16</sup> and with regards to supply chain resilience, clusters can play a pivotal role by leveraging the expertise of various stakeholders across value chains, encompassing SMEs, multinationals, and start-ups.<sup>17</sup></p>

Source: ECCP (2023)

<sup>14</sup> see <https://clustercollaboration.eu/content/austrian-national-cluster-platform-webinar-internationalisation-recap> and <https://www.go-international.at/> (last access 07.03.2024)

<sup>15</sup> De Marchi et al. (eds., 2018).

<sup>16</sup> Singh et al. (2023).

<sup>17</sup> European Commission (2021)



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## Annex

**Table 6: 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).