

25 years of clusters in Upper Austria – some lessons

innovation is our business.

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Werner Pammingner

25 years of clusters in Upper Austria

no cluster policy so far

non planned either

the end – let's enjoy the rest of the day ;-)



Upper Austria – the top economic region in the north of Austria



A small yet populous region

Upper Austria is the most dynamic economic region in Austria and the leading federal province with regard to export, technology and industry, located in the heart of Europe. The most important cities in the region are Steyr, Wels and the capital city Linz.



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Facts and figures about Upper Austria

1.5 M

- inhabitants in an area of 11.980 km²

5,595

- number of companies registered in 2022

4.7 %

- economic growth in 2022

Facts and figures about Upper Austria

13%

landscape of
AUT

17%

inhabitants
of AUT

25 %

industry volume
of AUT

28 %

export volume
of AUT

35 %

energy
consumption
of AUT

A decorative graphic on the left side of the slide consists of several overlapping circles. One circle is a thick dark blue line, while the others are thin light blue lines. They are arranged in a way that creates a sense of depth and movement, with some circles appearing to be in front of others.

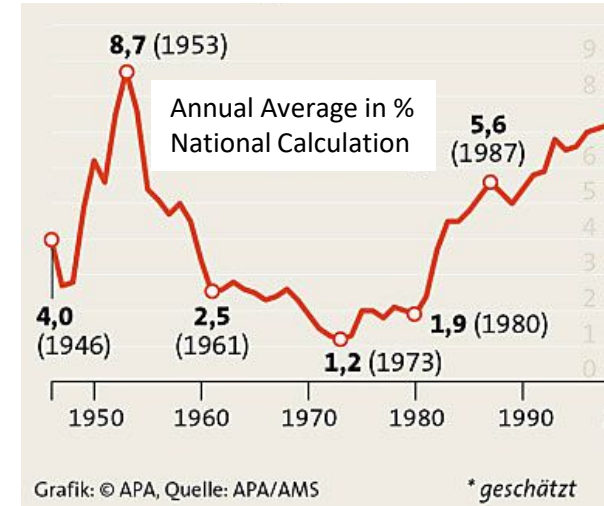
Foundation and Basic Principles of Cluster Initiatives in (Upper) Austria

innovation is our business.

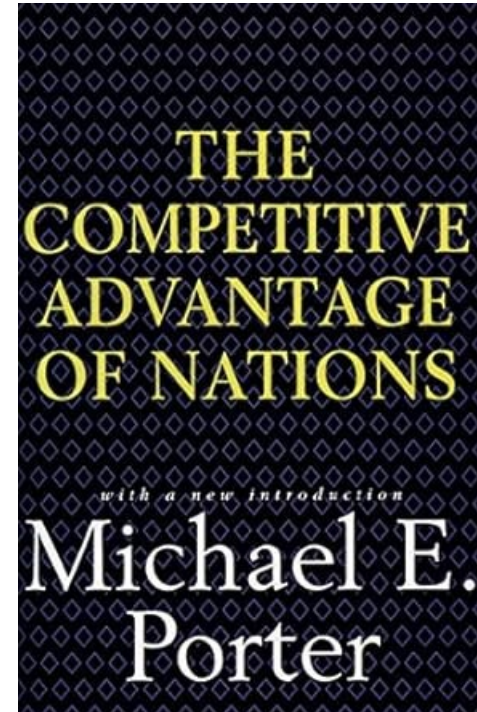
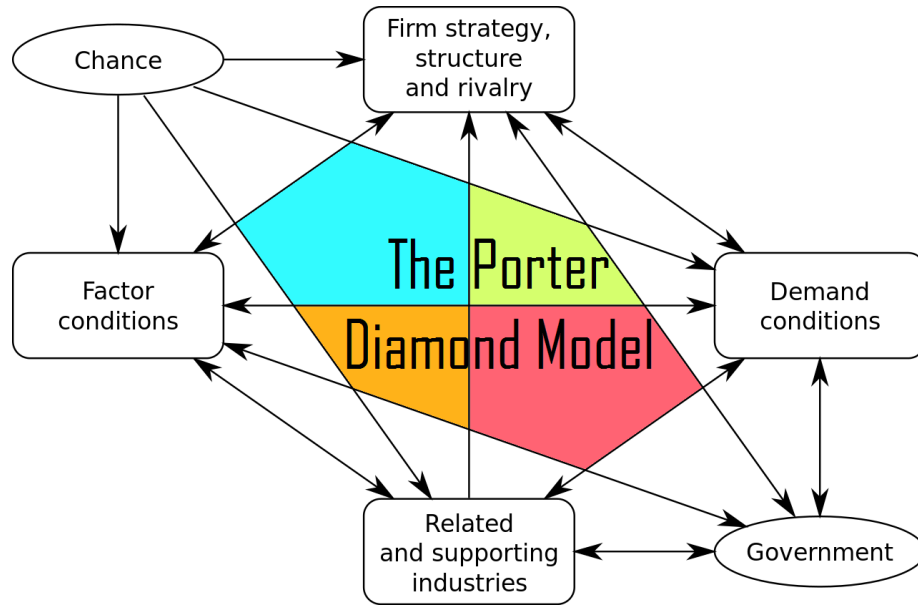
Mid of the 1990ies Upper Austria faced multiple crisis...



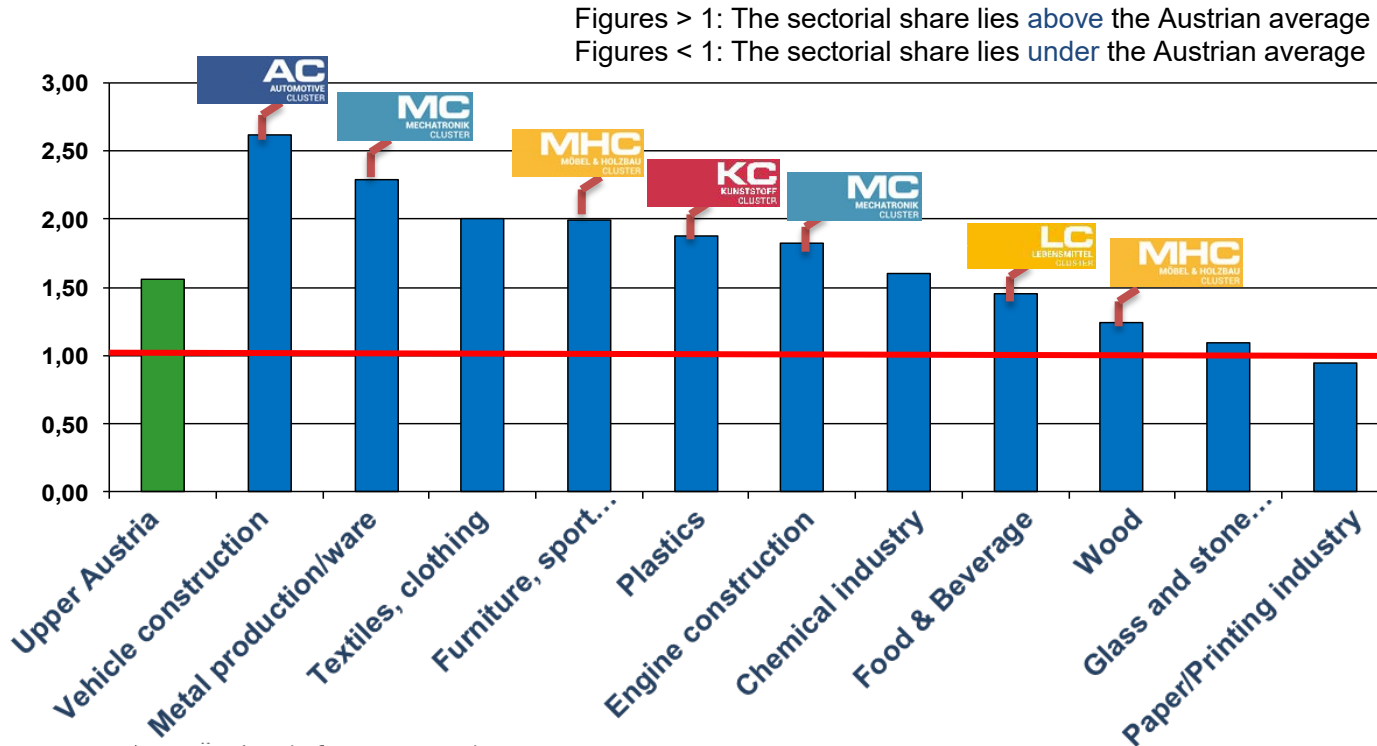
Unemployment Rate in Austria



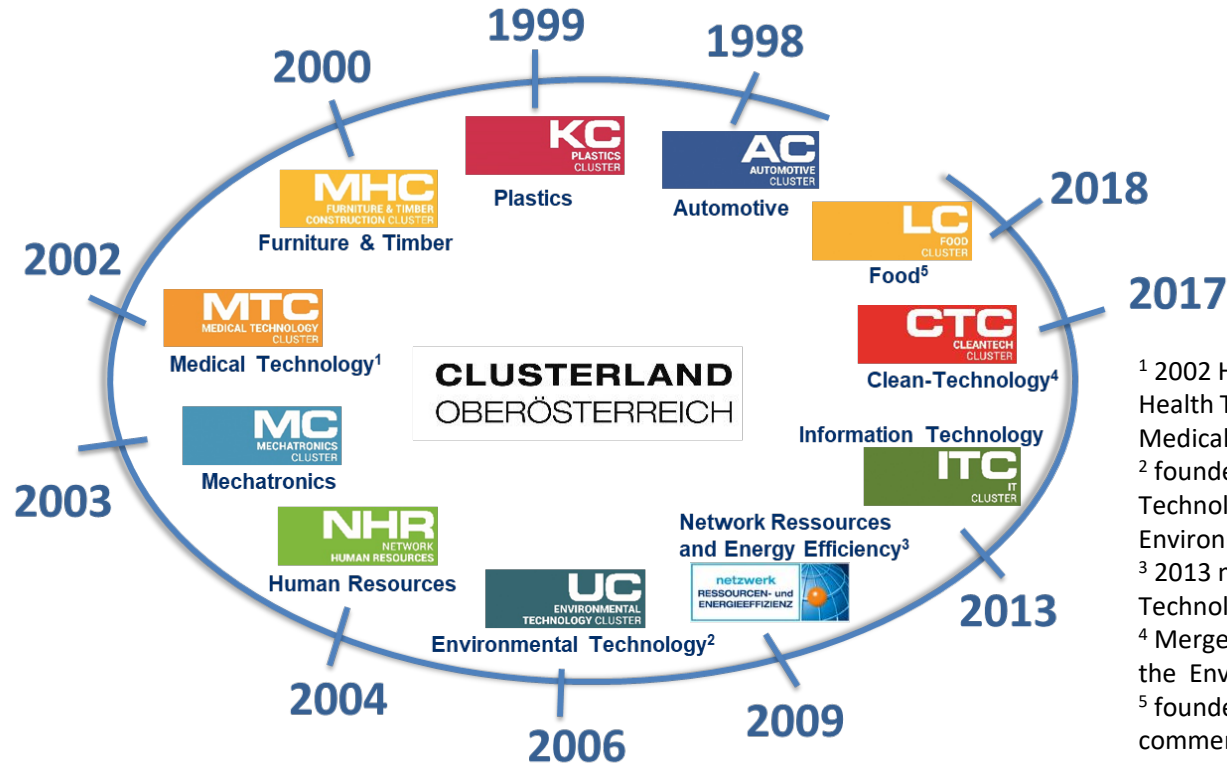
...when a delegation of Upper Austrian Politicians and Stakeholders visited UK and got aware of a new concept



Regional Specialization Patterns Analysis of Upper Austria beginning of 2000...



...led to consecutive Founding of Cluster Initiatives



¹ 2002 Health Cluster; 2010 rebranding in Health Technology Cluster; since 2014 Medical Technology Cluster

² founded as Network Environmental Technology – from 2009 onwards Environmental Technology Cluster

³ 2013 merged with the Environmental Technology-Cluster

⁴ Merger of the Green Energy Clusters with the Environmental Technology-Cluster

⁵ founded 2000 in the chamber of commerce Upper Austria, since 2017 in the Clusterland

...creation of a long lasting vision, mission and strategy which...



Innovation
through
Cooperation

Our Claim



...result in facts and figures

~2.000
Committed Members
85%

Small and Medium Sized Enterprises



850



Regional cluster cooperation projects with

>3.000 involved companies &
€ 190 Mio. project Volume

> 2.100 collaborative Measures
without public funding

> 30 ongoing European projects

Customer Intimacy

> 1.800

Customer Visits at Site

~ 300 Events and Trainings,
> 500 Speakers,
~ 10.000 Participants,

> 100 Bench-Learning Groups per
Year

172 Representatives in 10 different
advisory boards,

> 30 Advisory board meetings for
agenda setting per year

Main Topics



Efficient & Sustainable Processes,
Efficient and Connected Mobility



Sustainable Plastics, Digitalization &
Manufacturing Technologies,
Lightweight Construction



Smart Engineering, Intelligent
Production, Industrial Services



Technologies for sustainable
construction and operations, new
applications for wood



Medical Engineering, Digital Health,
Medical Materials, Care Technologies



Circular Economy, Bioeconomy,
Decarbonization, CSR & ESG



Information Security, Industrial Data,
Business Software

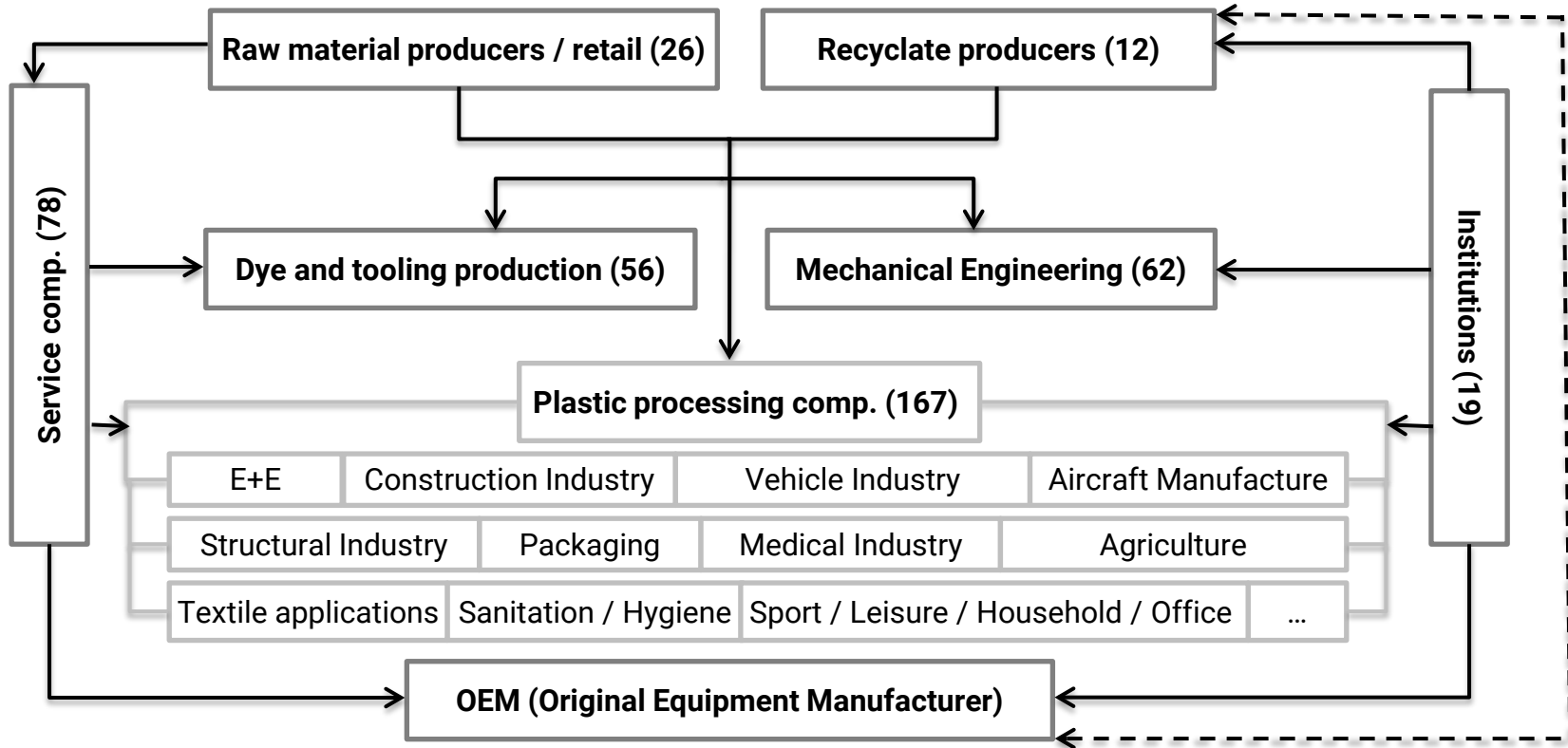


New Food Technologies & Innovations,
Food Safety and Quality Management



Strengthening the Hagenberg
ecosystem, Artificial Intelligence,
Sustainable IT

Incorporating the whole value-chain





Business Upper Austria: Your One-Stop-Shop

Customised services from the business idea to market success

innovation is our business.

| 24.10.2024

Business Upper Austria – serving 3000+ companies p.a.



Cluster and Cooperations	Investor Service	Promoting Innovation	Policy Strategy	Human Capital Management	Subsidiaries
2,085 partners 850 cooperation projects >200 events with > 6,000 attendees per year	500-550 companies supported 75 new arrivals with EUR 412 million investment and 2.133 new jobs in 2022 29 inter-communal settlement projects and business parks > 800 commercial real estate objects on www.standortooe.at	800 companies advised and 150 innovation projects per year	- EUR 2,2 billion project volume made available to companies 12,800 projects and planned projects	175 partners 130 companies in ERFAs 781 open jobs on the STEM job platform 7 participations per year in foreign trade fairs 600 consultations of international talents 1,270 event visitors in 2022	6 technology centres with 171 companies - High-tech incubator Tech2b with 50 new start-ups p.a. - Upper Austrian Research with 10 research participations

Business Upper Austria – facts & figures budget 2024



balance sheet total 18.9 mio€

self financing rate: 48%

number of employees (FTE) 145

The Upper Austrian location agency's shareholders



65% OÖ Landesholding GmbH



15% Upper Austrian Chamber of Labour

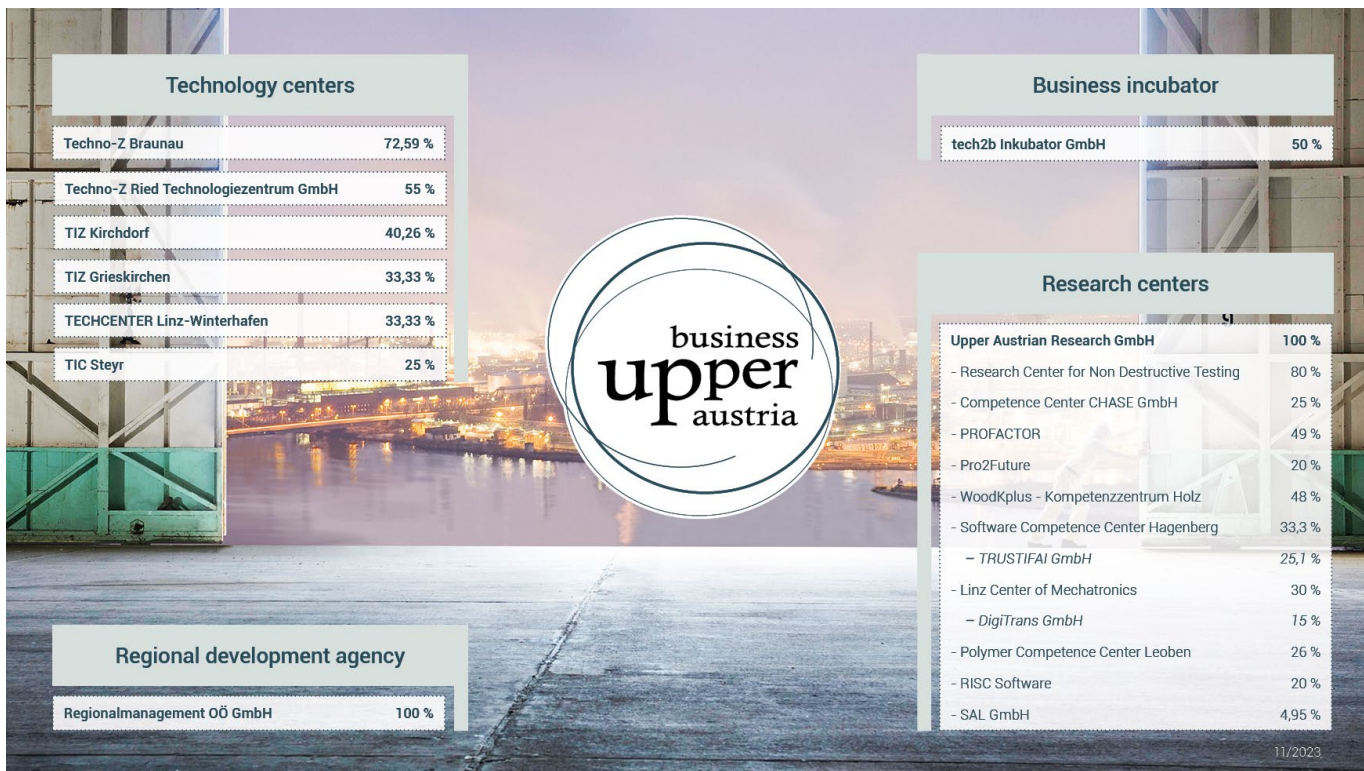


15% Upper Austrian Chamber of Commerce



5% Confederation of Upper Austrian Industry

Biz-up's innovation subsidiaries



SOME LESSONS?!

R&D

vs.

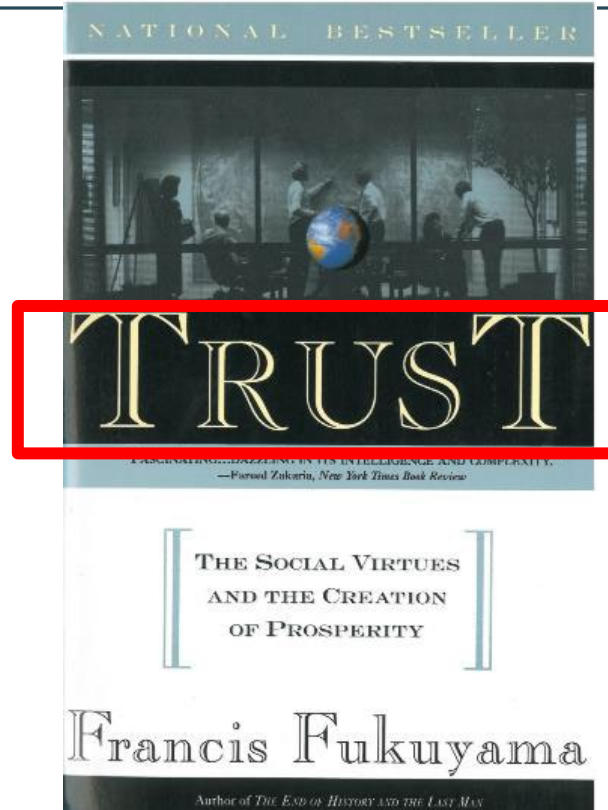
Innovation



Public financing – Oil or Coal?



The core issue in cluster Management: TRUST



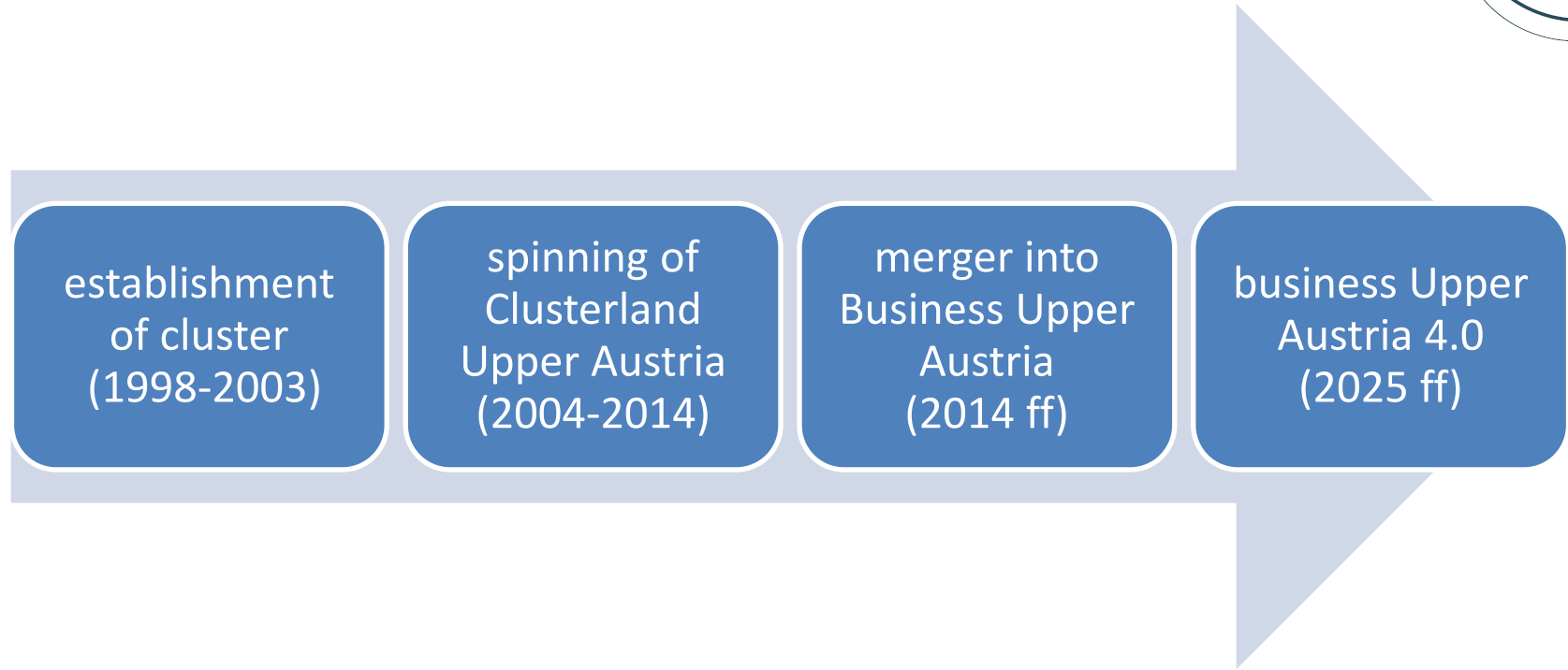
TRUST – the golden rules of



- TRUST needs touch
- TRUST needs time
- TRUST is tough!

WHATS NEXT?

Continuous organizational change



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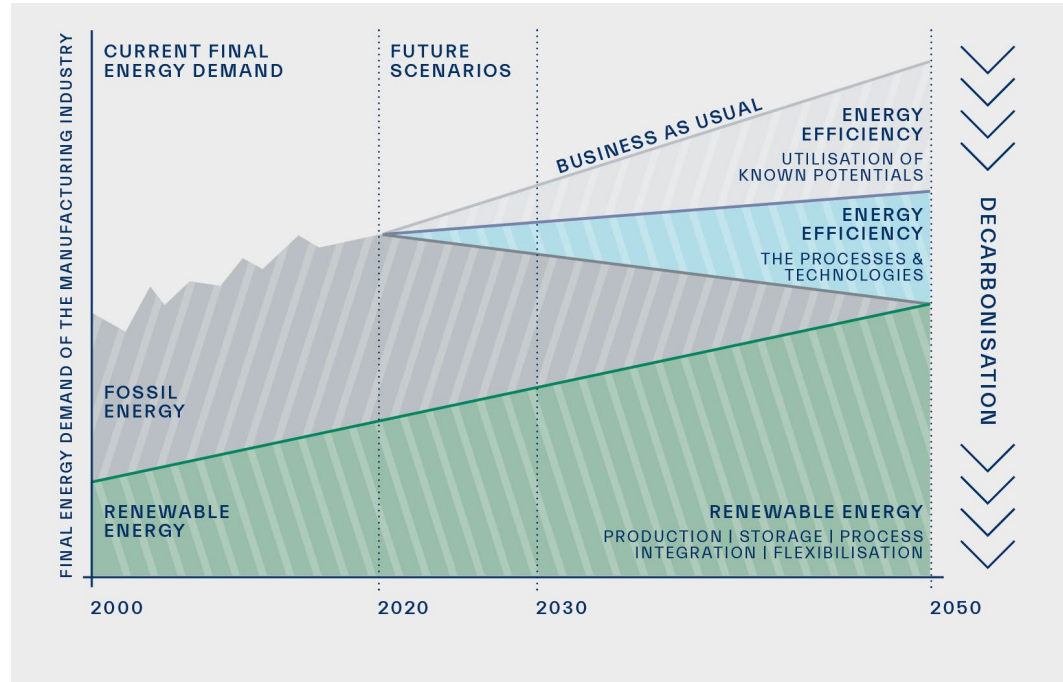
energy
consumption
of AUT



transformation through innovation

NEFI VISION & GOALS

NEFI key technologies “Made in Austria” enable the **decarbonisation** of industrial energy systems and help to **secure Austria’s position** as an industrial location.



Decarbonisation
of industrial energy systems

100 % renewable energy supply at
selected locations

Added value “Made in Austria”

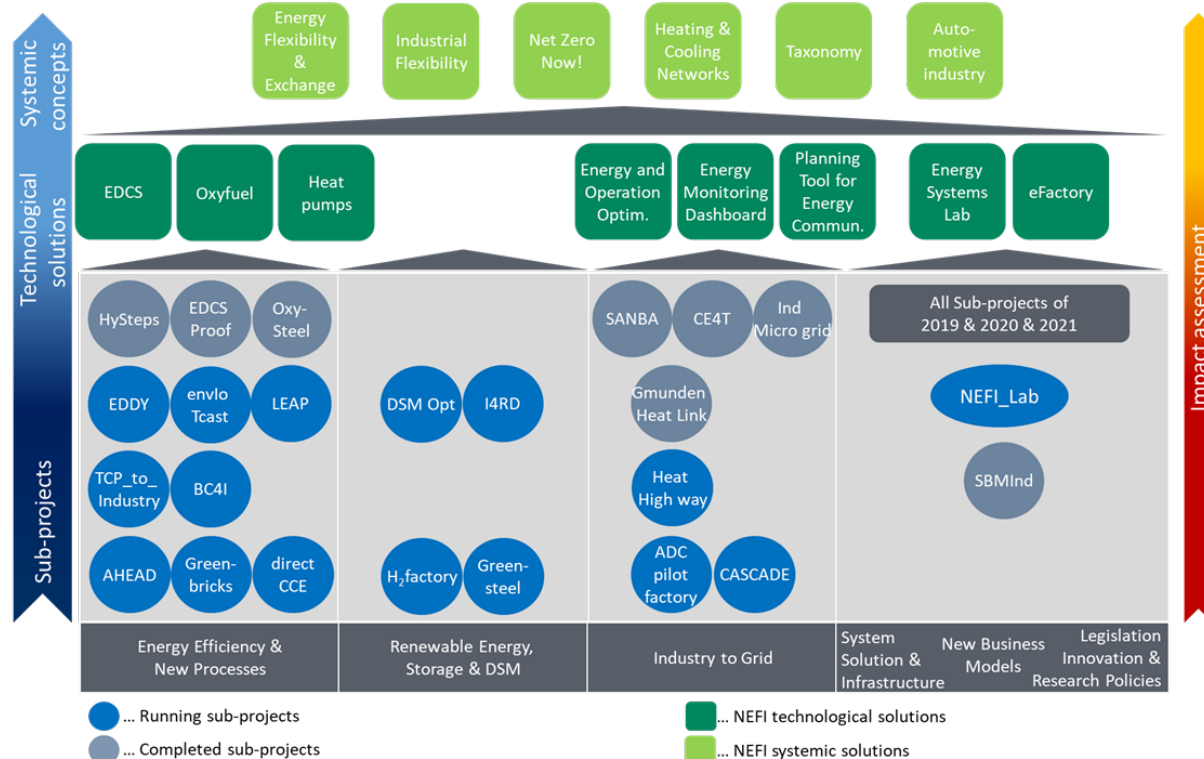
through export and technology
development

Securing the industry location

contribution to the economic location
Austria by user involvement

NEFI INNOVATION NETWORK

INNOVATION FIELDS – PROJECT LANDSCAPE – NEFI SOLUTIONS



- 8 completed projects
- 16 running projects
- > 92 Mio € total project volume
- 28 Mio € KLIEN funding volume
- 14 Mio € KPC funding
- 3 Mio € funding from regions Styria and Upper Austria
- 120 partners from industry, RTOs and public institutions

HI2 – Hydrogen Industrial Inland Valley Austria

Hydrogen Valley key facts

budget:

total budget: 578 mio. €
corporate funds: 330 mio. €
tbd: 172 mio. €

regions:

Upper Austria
Styria
Carithia

production:

104 MW new electrolyzer
10.125 to H2 p.a.
central, semi-central and decentral

Start: Jan 2025

planning

2025 – 2027



implementation

2027 – 2028



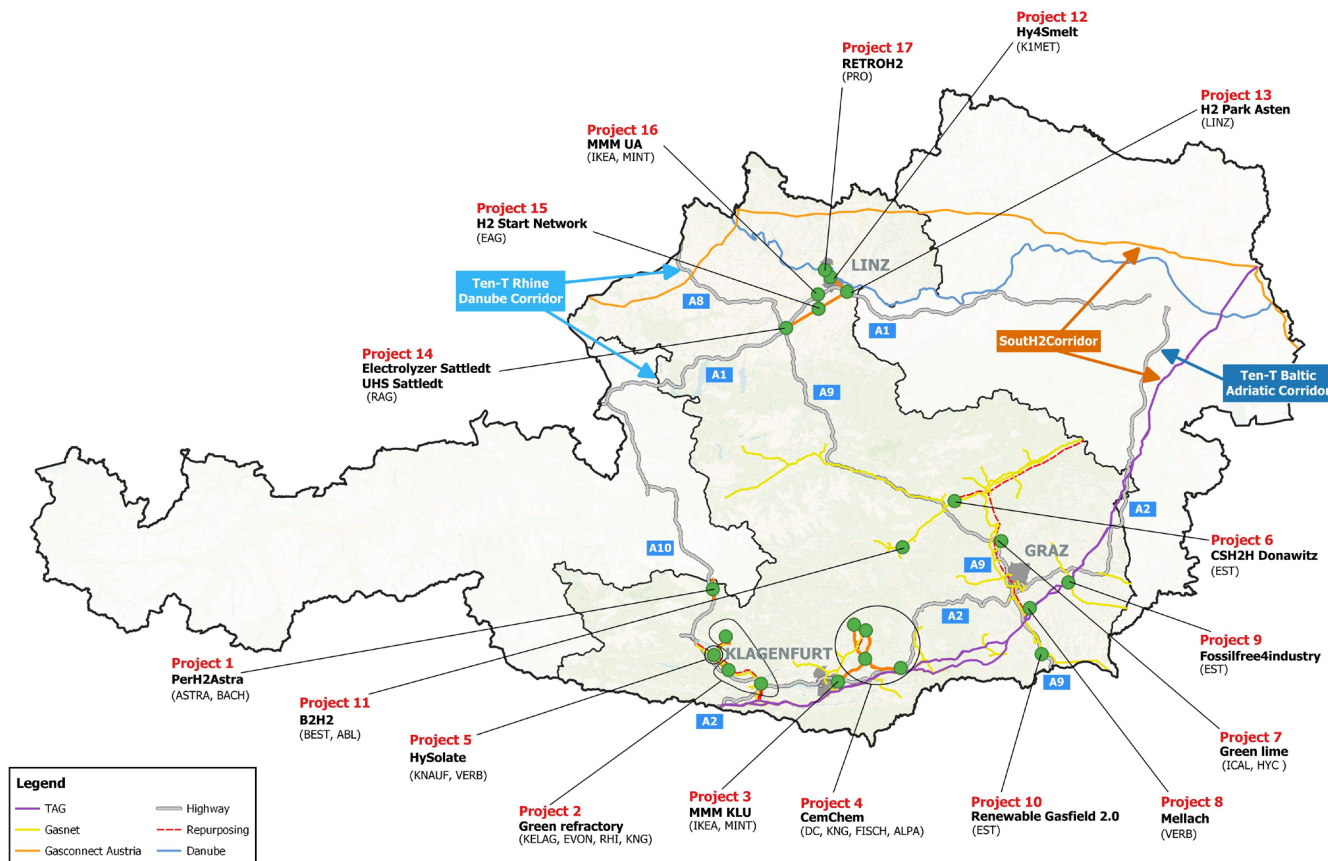
operation

2028 – 2030

17 pojects:

production
(underground-)storage
pipeline and und
trailerdistribution
industries: steel, chemical,
cement, chark, mobility, energy

project map





transformation through innovation

Clusters in Upper Austria – beyond cluster policy



„Cooperation is an Upper Austrian
Core-competence“

...but the real core-competence needed is....



Contact and Information

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