![European Cluster Collaboration Platform logo]

**EUROPEAN CLUSTER
COLLABORATION PLATFORM**

Country factsheet 2022

Austria

An initiative of the European Union

Contents

Strengthening the European economy through collaboration

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Introduction

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 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.

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[1], 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.
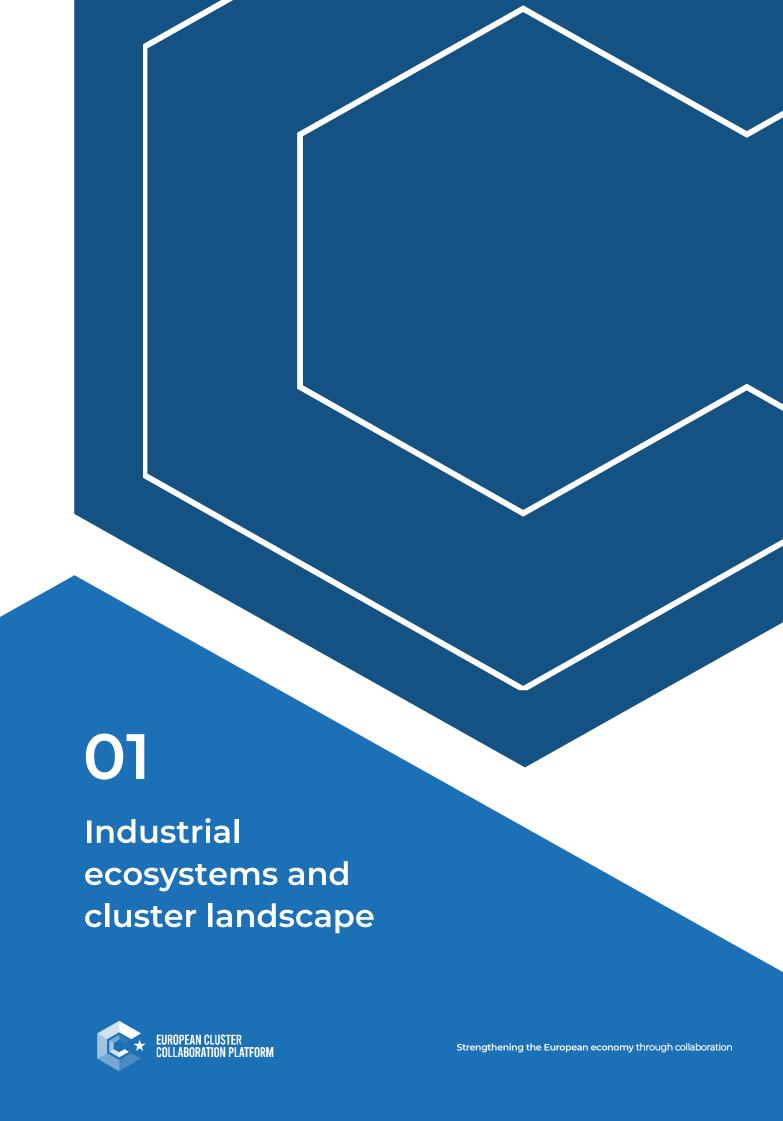
The ERDF Partnership Agreement 2021-2027 for Austria makes a clear reference to clusters. Based on the agreement, cluster and networks support the development of transnational partnership associations, cooperative relationships and particularly SMEs. Cluster development aims to strengthen regional innovation ecosystems and improve their international integration. This is expected to enhance synergies between programmes that operate on regional, national, and European levels.

In the 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,
3) an assessment of the state of play of the national cluster policy.

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[1]EC, 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

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.[2] The classification of the 14 industrial ecosystems have been calculated by aggregating NACE 2 -digit activities, following the methodology established in the European Commission.[3]

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 in the ecosystems

Source: ECCP (2022), own elaboration from Eurostat.

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[2] for more information, see https://clustercollaboration.eu/in-focus/industrial-ecosystems (last access 09.01.2023).
[3] see European Commission (2021): Annual Single Market Report, SWD(2021)351.

Regionally relevant nodes (agglomerations)

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.[4] The following tables show the total number of regionally relevant specialisation nodes (agglomerations) 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 41 in the country, while the second table is based on the 14 ecosystems, which total 11 in the country.

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

Region	Number of nodes	Node 1	Node 2	Node 3	Node 4	Node 5
AT11: Burgenland	3	I55 - Accommodation	F43 - Specialised construction activities	C27 – Manuf. of electrical equipment		
AT12: Lower Austria	2	H51 - Air transport	C24 – Manuf. of basic metals			
AT13: Vienna	7	J63 - Information services	M73 - Advertising & market research	M70 – Activities of head offices	L68 - Real estate activities	J62 - Computer programming, consultancy and related activities
AT21: Carinthia	5	C26 – Manuf. of computer, electronic & optical products	I55 - Accommodation	C16 – Manuf. of wood and wood products	C23 – Manuf. of other non-metallic mineral products	C28 – Manuf. of machinery and equipment
AT22: Styria	5	C24 - Manufacture of basic metals	C26 - Manufacture of computer, electronic & optical products	I55 - Accommodation	C27 - Manufacture of electrical equipment	M71 - Architecture, engineering
AT31: Upper Austria	6	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	2	I55 - Accommodation	C16 – Manuf. of wood and wood products)			
AT33: The Tyrol	5	I55 - Accommodation	C21 - Manuf. of pharmaceuticals	C16 – Manuf. of wood and wood products	C23 - Manuf. of other non-metal mineral products	C27 - Manuf. of electrical equipment
AT34: Vorarlberg	6	C13 - Manuf. of textiles	C25 - Manuf. of fabricated metal products	I55 - Accommodation	C28 - Manuf. of machinery & equipment	C28 - Manuf. of electrical equipment

Source: ECCP (2022), own elaboration from Eurostat.

Overall, there are fewer numbers of ecosystem nodes compared to the regionally relevant sectoral nodes 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 notes (NACE) which is also reflected in the regions relevant industrial ecosystem nodes Digital and Cultural and creative industries. Several Austrian regions have singular industrial ecosystem nodes in electronics or tourism, with the heavily industrialised region of Vorarlberg (AT34) standing out in particular with three ecosystem nodes in Textile, Electronics, and Energy-Renewables which are also reflected in its sectoral NACE nodes of manufacturing of textiles (C13), machinery and equipment (C28) and electrical equipment (C28).

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[4] 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).

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Table 2: Regionally relevant ecosystem nodes by region

Region	Number of ecosystem nodes	Node 1	Node 2	Node 3
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	2	Energy-intensive industries	Energy – Renewables	-
AT32: Salzburg	1	Tourism	-	-
AT33: The Tyrol	1	Tourism	-	-
AT34: Vorarlberg	3	Textile	Electronics	Energy – Renewables

Source: ECCP (2022), own elaboration from Eurostat.

Cluster organisations in the regions

There are 28 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, 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 (six 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

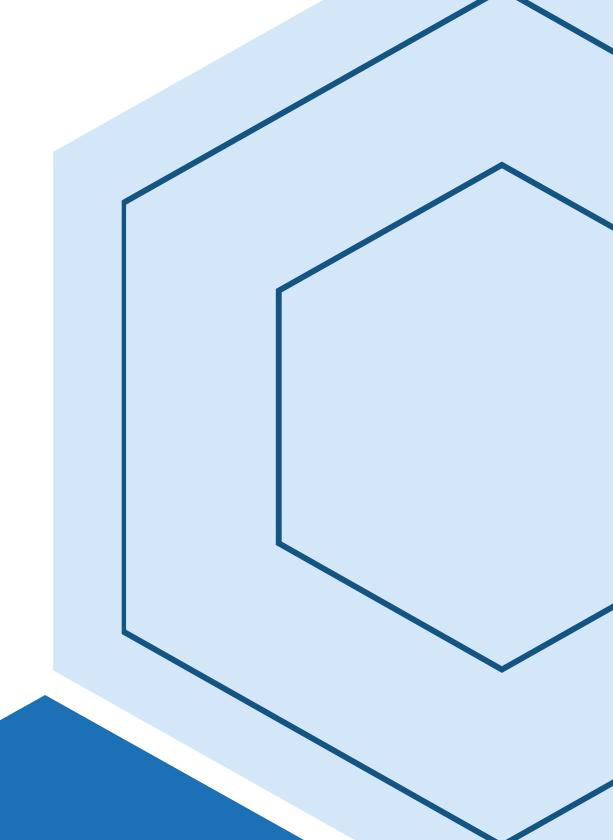Source: ECCP (2022). Note: the data for the analysis was extracted on 14/10/2022.

SMEs (87%, EU: 84%) followed by large enterprises (7%, EU: 9%) and research organisations (7%, EU:7%) constitute the majority of member organisations of Austrian cluster organisations with profiles on the ECCP. From a thematic perspective, these Austrian cluster organisations are

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operating in the following industrial ecosystems. Since not all cluster organisations on the ECCP provided this information, the number of cluster organisations with an allocated industrial ecosystem is lower than the overall number of cluster organisations in the country.

- Health (2 cluster organisations)
- Agri-food (1 cluster organisation)
- Renewable Energy (1 cluster organisation)
- Digital (1 cluster organisation)
- Construction (1 cluster organisation)
- Electronics (1 cluster organisation)
- Proximity & Social Economy (1 cluster organisation)

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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 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 Tyrol. To gain an insight into Austrian regional policy in Lower Austria that was outlined in the previous factsheet of 2021, one can follow this link: Country Factsheet 2021 (*access via ECCP registration*).

In Austria, different public authorities and cluster management organisations implement federal and provincial cluster support programmes. In total, around 6 clusters with more than 7.100 cluster members are recorded. On the federal level, the Austrian Federal Ministry of Labour and Economy provides with the Austrian cluster plattform 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 / provinencial 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 2022), which are applied for comparative purposes. This is followed by a complementary descriptive text to provide more insights about the cluster policy in Austria.

Policy type:	National cluster policy	Regional cluster policy (example of Tyrol)
Policy name:	Austrian cluster platform	Tyrolean cluster programme
POLICY OBJECTIVES	**Strengthening cooperation between companies or industry and RTDI actors**	**Strengthening cooperation between companies or industry and RTDI actors**
	Increasing competitiveness and boosting scale up of SMEs	**Increasing competitiveness and boosting scale up of SMEs**
	Supporting internationalisation activities	**Supporting internationalisation activities**
	Enhancing the visibility of clusters	**Enhancing the visibility of clusters**
	Fostering R&D activities, technology development and implementation	**Fostering R&D activities, technology development and implementation**
	Fostering innovation and strengthening innovation ecosystems	**Fostering innovation and strengthening innovation ecosystems**
	Supporting cluster excellence and professionalisation of cluster management	**Supporting cluster excellence and professionalisation of cluster management**
	Supporting the consolidation of existing cluster organisations	**Strengthening the network of cluster organisations/cross-clustering**
	Promoting resilience and sustainable economy and other solidarity-based initiatives	**Supporting the consolidation of existing cluster organisations**
	Promoting employment and upgrading skills and competences	
	Strengthening the network of cluster organisations/cross-clustering	
	Cluster analysis and support for policymaking	
	The main objective of the National Cluster Platform is to provide a platform whereby federal and regional cluster	The policy objectives of the Tyrolean cluster programme, implemented by the regional business agency of Tyrol, are to

Policy type:	National cluster policy	Regional cluster policy (example of Tyrol)
Policy name:	Austrian cluster platform	Tyrolean cluster programme
	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.	actively support cross-sector cooperation between cluster members through the promotion of different cooperation activities, impulses for joint innovation activities and the screening of latest trends.
POLICY FOCUS	**No specific focus**	**Cross-sectoral**
	The platform does not have a specific industry focus, however, focuses on cluster organisations at the regional and national level.	The thematic focus of the six Tyrolean cluster organisations are renewable energies, information technologies, creative industries, life science, mechatronics and wellness & life quality.
RESPONSIBLE AUTHORITIES	**In charge of drafting** **In charge of implementation** **Oversees the implementation**	**In charge of drafting (Tyrolean regional government)** **In charge of implementation (Tyrolean business agency)** **Oversees the implementation (Tyrolean regional government)**
	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. 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	The drafting and overseeing of implementation of the Tyrolean cluster programme is done by the regional Tyrolean government as part of the Innovations- und economic strategy of the region. The programme itself is implemented by the regional business agency Tyrol. Founded in 1997, the business agency Tyrol acts as a service provider, initiator and pioneer for business and science regarding growth, research, technology, innovations and cooperation. The business agency Tyrol employs a cluster management team who oversee the activities of their six regional clusters. The clusters of business agency Tirol GmbH are co-financed by the Province of Tyrol and the European Regional Development Fund (ERDF).

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Policy type:	National cluster policy	Regional cluster policy (example of Tyrol)
Policy name:	Austrian cluster platform	Tyrolean cluster programme
	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. 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.	
BENEFICIARIES	**SMEs** **Research organisations** **Academic institutions** **Start-ups** **Business associations** **Technology centres** **Cluster organisations** **NGOs**	**SMEs** **Research organisations** **Academic institutions** **Start-ups** **Cluster organisations** **Large firms** **Municipalities**
	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	The regional business agency Tyrol target stakeholders of the local economy and science in the areas of research, technology, innovation and cooperation. Increased cooperation between companies and research institutions in technology and innovation projects motivates and supports them, among other things, in their own clusters. The clusters accelerate the transfer of their technologies into the economy. Furthermore, the

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Policy type:	National cluster policy	Regional cluster policy (example of Tyrol)
Policy name:	Austrian cluster platform	Tyrolean cluster programme
	Networks supporting organisations. 3) Public institutions and institutions that put a focus on RTI policies.	business agency Tyrol advises and accompanies all Tyrolean companies and research institutions in the use of research, technology and innovation programmes of the public sector - specifically the province of Tyrol, the federal government and the EU.
INSTRUMENTS — **Financial**	**Funding collaboration initiatives** **Support to R&D projects, SMEs becoming cluster members, etc.** **Subsidies to hire personnel** **Subsidies for cluster infrastructure (e.g. offices, equipment)** **Financing networking events**	**No financial support**
Technical assistance	**Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence** **Support for soft skills development: coaching, management training, upskilling/reskilling** **Support for networking and partnership building (at national and/or international level)** **Marketing activities: advertising, communication, events, fairs, and so on** **Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.**	**Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence** **Support for soft skills development: coaching, management training, upskilling/reskilling** **Support for networking and partnership building (at national and/or international level)** **Marketing activities: advertising, communication, events, fairs, and so on**
Explanation	The National Cluster Platform itself offers technical assistance for cluster management. However, the National Cluster	The Tyrolean cluster programme offers different support measures for innovation actors such as SMEs or startups through

Policy type:		National cluster policy	Regional cluster policy (example of Tyrol)
Policy name:		Austrian cluster platform	Tyrolean cluster programme
		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.	their own cluster organisations. Besides networking activities of cluster organisations, startups, SMEs and investors. In addition, other services are funding advice, innovation consulting, trend monitoring, competence mapping and support of business expansion.
HISTORY	**Period**	**Limited period**	**Limited period**
	Ending year *(for policies with limited period)*	Data unavailable	Data unavailable
	Starting year	2008	2014
	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 Tyrolean cluster policy has already long tradition with its regional cluster programme. The first one had been launched in 2003. The current Tyrolean cluster programme ran from 2014 to 2022 and has been renewed through the latest version of the regional innovation and economic strategy (2020).
	Overall	Data unavailable	Data unavailable

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Policy type:		National cluster policy	Regional cluster policy (example of Tyrol)
Policy name:		Austrian cluster platform	Tyrolean cluster programme
BUDGET	Annual	Data unavailable	EUR 330.000
	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.	European Regional Development Fund (ERDF), Membership fees and sponsorship
POLICY	Availability	**in-itinere**	**ex-post**
EVALUATION	Results	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.	Yearly monitoring and reporting of the milestones of the programme as part of the Tyrolean economic and labour report. According to the latest report (2021), the initiative reached so far, a total number of 417 members in their cluster networks (life science, renewable energies, wellness, mechatronics, IT, creative industry). In addition, 106 cooperation of cluster members and 46 qualification measure were initiated through the cluster programme. 196 dialog meetings and 107 innovation consulting meetings took place.
POLICY ALIGNMENT WITH THE EU PRIORITIES		**Green economy** **Digitalisation** **Resilience**	**Green Economy** **Digitalisation** **Resilience**

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03

State of play of cluster policy

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3. State of play of cluster policy

This section presents an overview on the state of play of Austrian cluster policy in the form of a quantitative and qualitative assessment. The data below illustrates how the country ranks in terms of **maturity of cluster policy at the national level.** The maturity assessment is based on a combination of factors presented in Chapter 2, which receive a score based on the existence or absence of a given element in the cluster policy. The regional cluster policy example is not included in this assessment.

Note: the maturity assessment does not reflect the performance of a country, but only the degree of development of their national cluster policy at the moment of data collection (Q3 2022). The assessment illustrates how the country scores for each of the four criteria (policy scope, continuity of cluster policies, evidence of performance, cluster support instruments) compared to the maximum score that they can reach. Please refer to the **Annex** for the detailed overview of the categories and the scoring system.

The table below presents an overview of the **maturity assessment for Austria** for 2022. The total score of Austria is 7 points out of 8.

Austria	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	
	Sectoral policy	1	
	National and/or regional cluster policy	2	**2**
CONTINUITY	No cluster-specific policy available	0	
	Cluster policy established recently	0,5	
	Cluster policy established between over 2 and 10 years	1	
	Cluster policy established over 10 years ago	2	**2**
EVIDENCE OF PERFORMANCE	No evaluation and / or monitoring available	0	
	Existence of evaluations of past policies	0,5	
	Existence of monitoring or an ongoing / interim evaluation	1	**1**
	Existence of monitoring and ex-ante or ongoing / interim evaluation	2	
CLUSTER SUPPORT INSTRUMENTS	No instruments for cluster development	0	
	Financial support for cluster development in the broader and / or sectoral policy	0,5	
	Financial or technical support for cluster development in dedicated cluster policy	1	
	Financial and technical support for cluster development in dedicated cluster policy	2	**2**
TOTAL (8)			**7**

Source: ECCP (2022)

Drawing from the table above that showcases the scored points in Austria's cluster policy, the Figure below portrays the **degree of maturity** across six categories related to the national level cluster policy.

Figure 3: Maturity of cluster policy - Austria

Source: ECCP (2022)

The text below provides a **qualitative description** of the state of play of the cluster policy in Austria, which is complementary to the maturity assessment presented above.

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 ten 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, 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.

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.

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.

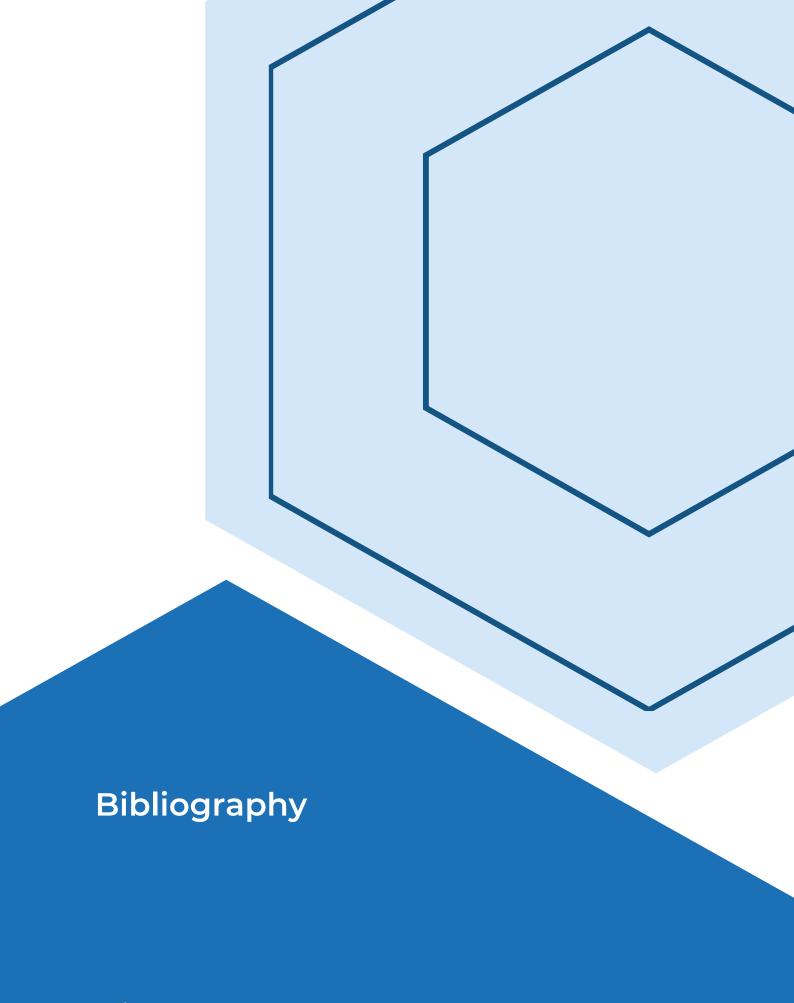### Cluster support instruments

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.

Cross-regional / international cooperation

In the 2014-2020 funding period, 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". [5]

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[5] For more information on the Euroclusters see: https://clustercollaboration.eu/euroclusters (last access on 21.03.2023)

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Annex

Criterion of maturity assessment	Description	Scoring (points between 0 and 2)
Policy scope	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	**absence of cluster policy = 0** **existence of broader policies = 0,5** **existence of specific sectoral policies = 1** **existence of targeted cluster policies = 2**
Continuity of cluster policies	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	**absence of policies supporting cluster development = 0** **cluster policy established recently (within the last 2 years) = 0,5** **cluster policy established between over 2 and 10 years = 1** **cluster policy established over 10 years ago = 2**
Evidence of performance	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	**no evaluation and / or monitoring available = 0** **existence of evaluations of past policies, e.g. ex-ante = 0,5** **existence of monitoring or an ongoing / interim evaluation =1** **existence of monitoring and ex-ante or ongoing / interim evaluation =2**
Cluster Support Instruments	assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support	**no instruments for cluster development =0** **financial support for cluster development in the broader and / or sectoral policy = 0,5** **financial or technical support for cluster development in dedicated cluster policy = 1** **financial and technical support for cluster development in dedicated cluster policy = 2**

Source: ECCP (2022)

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