



Danube Transnational Programme

DanuBioValNet

Regional cluster landscape Austria

WP3 Value Chain Mapping

Activity 3.2 Cluster Mapping

Output 3.2 Cluster Mapping as an Analytical Tool

D3.2.1 Regional cluster landscapes and one entire cluster landscape for Danube Region

***Cross-clustering partnership for boosting eco-innovation
by developing a joint bio-based value-added network for the Danube Region***



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CLUSTER MAPPING FACT SHEETS

In the following the cluster mapping results of selected clusters and cluster initiatives in Austria in the field of Eco-Construction, Bio-based Packaging

and Phytopharmaceuticals are presented. Besides the mapping as such, additional informations are given about age, size, key objectives etc.

ECO-CONSTRUCTION

Name of cluster organisation/initiative:

- Furniture and Wood Cluster Upper Austria

- Established year:

Founded in Upper Austria: 2000

- Location:

The Furniture and Wood Cluster Upper Austria is integrated in the organization "Business Upper Austria – OÖ Wirtschaftsagentur GmbH". It is the business agency for the state of Upper Austria and is in charge for strengthening the regional economy and promoting innovations and collaboration across different business sectors on national and on international level.

- **Cluster Manager:** Mr. Erich Gaffal

- **Address:** A-4020 Linz, Hafenstraße 47-51

- Number of Members:

The cluster has 245 members in the area of architecture, design, furniture, series furniture production, wood construction, carpenters and suppliers.

Short Description of the cluster/cluster initiative:

The Furniture and Wood Cluster Upper Austria is a cross-industry network that increases the companies' innovative potential and competitiveness. It works in the furniture and timber construction sectors and is also active in these sectors' networks of suppliers and specialist providers, training institutions and research facilities.

Cluster Visual Map of value chains:

The cluster map visual presentation sample is in figure below.



Picture 1: Value chain visualisation – Furniture & Wood Cluster Upper Austria



Numbers indicate amount of companies in the respective value-adding step.

Services offered by cluster organization/cluster initiative to support cluster members in the area of:

• Eco-Innovation:

- development of new projects in the field of circular economy, using design thinking methods to boost eco-innovation.

• Cross-sectorial/regional cooperation:

- fostering cross sectorial/regional cooperation

with a special funding pool offered by the state of Upper Austria (so called Cluster Cooperation Projects)

• Cross-sectorial/regional cooperation:

- special events on industry topics
- study tours
- qualification activities
- information and communication

Name of cluster organisation/initiative:

- Wood Cluster Steiermark
 - **Established year:**
Founded in Graz: 2001
 - **Location:**
The Wood Cluster Steiermark is located in Graz.
 - **Cluster Manager:** DI (FH) Erhard Pretterhofer
 - **Address:** Holzcluster Steiermark GmbH
Reininghausstraße 13a
8020 Graz
 - **Number of Members:**
The Wood cluster Steiermark has 150 members in the field of forestry, wood and paper.

Short Description of the cluster initiative:

The Wood Cluster Steiermark sees its task in equipping the industry for tomorrow, informing, qualifying and offering support so that new opportunities can be transformed into successes at an early stage. Through the constant exchange with business and science and permanent market observation, the cluster supports companies in the innovation process with advice and assistance. The new strategy 2015-2025 puts innovation, awareness-raising, qualification and location development in the areas of timber construction, new potentials, resources and services at the center of the clusters activities.

Cluster Visual Map of value chains:

The cluster map visual presentation sample is in figure below.



Picture 2: Value chain visualisation – Wood Cluster Steiermark



Numbers indicate amount of companies in the respective value-adding step.

Services offered by cluster organization/cluster initiative to support cluster members in the area of:

- **Networking and Information:**
 - Organization and implementation of innovation workshops
 - Networking with ideal project and funding partners
 - Promotional screenings
- **Qualification & further education:**
 - Qualification measures on wood-specific topics in cooperation with companies, universities and R&D institutions
- **Internationalization:**
 - Market & Competition Analysis
 - Market entry service
 - Funding screening
 - Interpreting service
 - PR & public relations in the favored target country
 - Business initiation & matchmaking
 - International Projects
- **Software Solutions:**
 - WoodWork - The software for small sawmills
 - WoodLogistics - The software for timber trading & logistics control

Name of cluster organisation/initiative:

• Wood Cluster Salzburg

- **Established year:**

Founded in Kuchl: 2000

- **Location:**

Since 2004, the cluster management has been organized in the Pro Holz Salzburg association, where it has its own business unit. This constellation makes it possible to make optimum use of synergies: Pro Holz stands for wood advertising and expert advice (the target group is the general public), while cluster management stands for support for wood-processing companies (the target group is the companies in the cluster).

- **Cluster Manager:** Mag. Herbert P. Lechner- **Address:** Holzcluster Salzburg

Markt 163

A-5431 Kuchl

- **Number of Members:**

The Wood Cluster Salzburg does not have any registered members, but offers its services to all timber companies in the value-added chain.

Short Description of the cluster/cluster initiative:

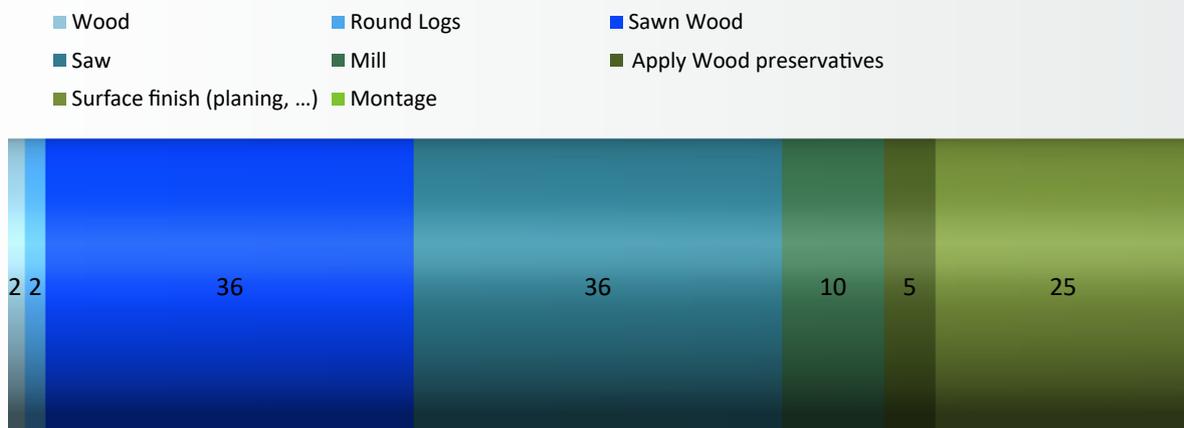
The Wood Cluster is the comprehensive network of all wood processing companies in the province of Salzburg. The task of the cluster management is to promote the exchange between companies, to strengthen the companies, to ensure their competitiveness, to initiate cooperations and to inspire the companies to face the tasks of tomorrow. The Wood Cluster Salzburg ensures knowledge transfer, networks and promotes cooperation along the timber value chain. Initiates cooperation with other industries, architects and technicians, carriers, educational institutions, research institutes and the media.

Cluster Visual Map of value chains:

The cluster map visual presentation sample is in figure below.



Picture 3: Value chain visualisation – Wood Cluster Salzburg

Wood Cluster Salzburg

Numbers indicate amount of companies in the respective value-adding step.

Services offered by cluster organization:

The Wood Cluster Salzburg is primarily the initiator of projects for Salzburg's timber companies. Above all, industry projects along the entire value chain are being promoted, but interdisciplinary and strategic projects for the wood cluster itself are also being initiated. The goal is to gain multipliers with selected key projects in order to strengthen the competitiveness of the Salzburg timber industry.

Offered services are:

- Initiation and process support of company cooperations
- Assistance with joint projects and their marketing
- Consulting in marketing matters
- Implementation of industry-specific events
- Development and organization of qualification measures
- Advice on innovations and subsidies
- Organizing fair appearances together with Pro Holz Salzburg
- Organizing study tours
- Press service for companies

List and short description of other key actors in bioeconomy including those with strong cooperation between SMEs and research in your region/country:

• Leading clusters

- Furniture and Wood cluster Upper Austria
- Wood cluster Steiermark
- Wood cluster Salzburg

• Key industrial leaders

- Wiehag (produce glued laminated beams)
- Wolf Systembau (wooden industrial buildings)
- Genböck (prefabricated houses)

• Competent research and academia

- **Technical University of Vienna** (Institute of Architecture: Focus on Structural Design and Timber Engineering)
- **Technical University of Graz** (Institute for Wood Construction and Wood Technology)
- **University of Arts in Linz**, Department of Architecture (University course for timber construction)

- **Wood K plus research institute** (Austria's leading research institute on topics like wood chemistry and biotechnology, wood polymer composites, wood & paper surface technologies and wood materials technologies)

- **Holzforschung Austria** (this research institute deals with the entire value-added chain - from wood storage in the forest to wood processing and a wide variety of products, also related disciplines such as surface coatings, wood preservatives and adhesives are treated)

- **Fachhochschule Kuchl** (this University of Applied Sciences offers a Master's Degree in Wood Technology & Wood Industry)

• Important policy and decision makers

- Federal Ministry of Agriculture, Forestry, Environment and Water Management

• Important policy and decision makers

- Pro Holz Austria (Pro Holz Austria is the marketing agency of the Austrian forestry and timber industry)

ADVANCED BIO-BASED PACKAGING

Name of cluster organisation/initiative:

- Plastics Cluster (Kunststoff-Cluster) Upper Austria/Lower Austria

- Established year:

Founded in Upper Austria: 1999
Founded in Upper Austria: 2005

- Location:

The Plastic Cluster Upper Austria is integrated in the organization "Business Upper Austria - OÖ Wirtschaftsagentur GmbH". It is the business agency for the state of Upper Austria and is in charge for strengthening the regional economy and promoting innovations and collaboration across different business sectors on national and on international level.

- **Cluster Manager:** Mr. Wolfgang Bohmayr

- **Address:** A-4020 Linz, Hafenstraße 47-51

The Plastic Cluster Lower Austria is integrated in the organization "ecoplus - Niederösterreichs Wirtschaftsagentur GmbH". It is the business agency for the state of Lower Austria. The Plastics Cluster in Lower Austria is also running the Biopolymerteam, which was founded about 6 years ago. Aim of the Biopolymerteam is to connect companies (producers, recyclers)

and R&D facilities to further develop the biopolymer sector (also advanced packaging sector). For having an active exchange of experiences they meet several times a year.

- **Cluster Manager:** Mr. Harald Bleier

- **Address:** A-3100 St.Pölten, Niederösterreichring 2

- Number of Members:

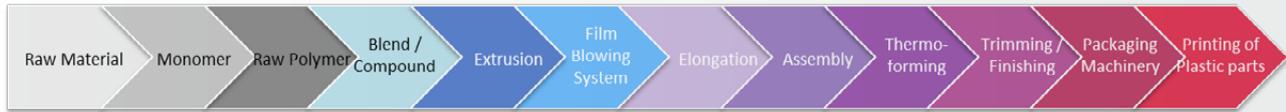
In total the Plastic Cluster has more than 400 partners in whole Austria and even abroad (Germany, Slovenia,...). 24 companies/research institutions out of this 400 partners are already working on advanced packaging solutions with biopolymers (producing or/and research activities). Those are also mainly members of the Biopolymerteam.

Short Description of the cluster/cluster initiative:

The Plastics Cluster is a cross-industry network for the plastics sector. It initiates, promotes and coordinates successful cooperation between companies. As a hub connecting member companies, research institutes and decision-makers, it is also committed to creating better conditions in the (bio-based) plastics industry in Austria.

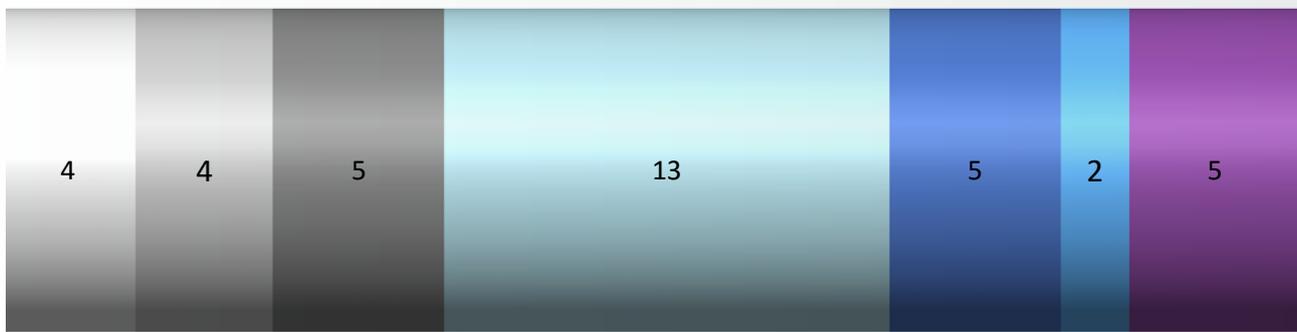
Cluster Visual Map of value chains:

The cluster map visual presentation sample is in figure below.



Picture 4: Value chain visualisation – Plastics Cluster UA

Plastics Cluster UA



Numbers indicate amount of companies in the respective value-adding step.

Services offered by cluster organization/cluster initiative to support cluster members in the area of:

- **Eco-Innovation:**
 - the tasks for eco-innovation are mainly coordinated and supported by the Biopolymerteam
- **Cross-sectorial/regional cooperation:**
 - fostering cross sectorial/regional cooperation with a special funding pool offered by the state of Upper Austria (so called Cluster Cooperation Projects)
- **New services :**
 - offering experience exchange rounds on

List and short description of other key actors in bioeconomy including those with strong cooperation between SMEs and research in your region/country:

- **Leading clusters**
 - Plastic Cluster (Kunststoff Cluster)
- **Key industrial leaders**
 - Greiner Packaging International GmbH
 - Fischer Plastics
 - Constantia Teich
 - Flexopack (important fabricator of packaging material – but is not doing research on advanced packaging solutions with biopolymers so far)
 - Technoflex (important fabricator of packaging

material – but is not doing research on advanced packaging solutions with biopolymers so far)

- KWK (important fabricator of packaging material – but is not doing research on advanced packaging solutions with biopolymers so far)

- **Competent research and academia**

- Leoben School of Mining – Department for Polymer Engineering and Science
- Agrana Research Institute – Research on starch as raw material
- JKU – University of Linz – Department for Chemistry and Polymer Engineering
- IFA Tulln – Department for Agrobiotechnology

- **Important policy and decision makers**

- Chamber of Commerce
- Federal Ministry of Science, Research and Economy
- Federal Ministry of Agriculture, Forestry, Environment and Water Management

- **Other key relevant stakeholders might be:**

- Food Cluster Upper Austria in Linz (contacts to/partners from food producing and manufacturing companies-->could promote the usage of advanced packaging materials)
- Clean Tech Cluster Upper Austria in Linz (contacts to/partners from the recycling industry)

PHYTOPHARMA

Name of cluster organisation/initiative:

- AUSTRIAN SOCIETY FOR PHYTOTHERAPY
(Österreichische Gesellschaft für Phytotherapie)

Short Description of the cluster/cluster initiative:

- The Austrian Society for Phytotherapy is concerned with all aspects of phytopharmaceutical products.

- Main tasks are:

Collection of medical and pharmaceutical experience; Initiation and promotion of pharmacognostic, chemical-pharmaceutical, pharmacological and clinical research; Evaluation of research results for clinical use; International exchange of experience, especially with other similar scientific societies; Providing information to the specialist circles on new research findings; Information to the general public on the benefits and limitations of the use of medicinal plants; Positioning phytotherapy with authorities, federal institutions, social insurance funds and other decision-makers in health care and society; Increase the proportion of phytopharmaceuticals in therapy.

List and short description of other key actors in bioeconomy including those with strong cooperation between SMEs and research in your region/country:

• Leading clusters

- No Cluster dealing with the topic Phytopharma exists so far in Austria

• Key industrial leaders

- APOMEDICA Pharmazeutische Produkte GmbH
- Gebro Pharma GmbH
- Pharmazeutische Fabrik Montavit Ges.m.b.H.
- Austroplant-Arzneimittel GmbH
- Styx Naturkosmetik

• Competent research and academia

- University of Vienna - Department for pharmacognosy
- University of Applied Sciences Wels - Josef Ressel Center

• Important policy and decision makers

- Federal Ministry of Health and Women's Affairs
- Federal Ministry of Science, Research and Economy
- Federal Ministry of Agriculture, Forestry, Environment and Water Management

• Other key relevant stakeholders might be:

- Study group for OTC and phytopharmaceuticals
- Medical Technology Cluster Upper Austria in Linz

The Cluster Mapping Report was created by:

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