

Editorial

CENTROPE is prospering. Last year, the economy of the CENTROPE countries grew almost twice as quickly as the EU-15 average. Forecasts claim that this trend will continue 2008. Cross-border economic activities, too, have increased markedly over recent years. According to current surveys, roughly one fourth of all enterprises in CENTROPE maintain business contacts with neighbouring countries. The magic formula for this success is “co-operation and networking”. Clusters are a promising instrument to focus and evolve existing assets of the region. This edition presents an overview of the multi-faceted cluster scene in the Central European Region, ranging from the booming automotive industry and renewable energies to furniture manufacturing and health tourism.

However, the CENTROPE Conference held in late November 2007 in Bratislava made it very clear that CENTROPE is ready for take-off not only from the economic-political angle. Eighteen months after adopting “Vision 2015”, a detailed business plan is nearing completion as a roadmap for concrete co-operative activities implemented by equal partners. With the Bratislava Memorandum “Long-term and Professional Co-operation”, the CENTROPE partners have agreed to implement this business plan together.

We wish you an interesting read, a merry Christmas and a happy new year 2008!

Yours sincerely,

ARGE CENTROPE

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Towards a European top-location

While CENTROPE is situated neither geographically nor economically at the centre of Europe, the four-country region does serve an important bridge function between the economic hubs in the west of Europe and the less developed but briskly growing markets in the eastern part of the continent. The massive investments of the automotive industry or the numerous headquarters of international corporations that have settled in CENTROPE emphasise the advantages offered by this easily accessible region at the interface between old and new EU Member States.

CENTROPE is growing. The economic data are positive all round. In 2006, Slovakia attained the highest growth rate since the political turnabout – fully 8.3% GDP –, and forecasts indicate an even higher growth rate of 8.5% for 2007. The Czech Republic, too, continued its robust growth in 2006 with an increase by 6.4 % (5% estimated for 2007). Due to an austerity package adopted in mid-2006, the Hungarian economy grew by “only” close to 4%, which still puts the country ahead of the EU-25 average (a plus of 3%). Austria likewise exceeded this average by attaining a growth rate of 3.1% – the highest in six years. Taken together, the economy of the CENTROPE states thus grew almost twice as quickly as the EU-15 average, and this trend will continue in 2007 and 2008, forecasts maintain.

The integration of markets within the Central European Region is rapidly proceeding. Despite existing barriers relating to infrastructure and the labour market, cross-border economic activities have markedly increased over recent years. According to the latest surveys, roughly one fourth of enterprises in CENTROPE maintain business contacts with neighbouring countries through subsidiaries, distribution channels or other forms of co-operation. While the old line of economic demarcation that had been the Iron Curtain is still palpable, Bratislava e.g. attains a GDP at purchasing power parity per capita that is already above the EU-25 average.

Strong location, future-oriented industries

The assets of CENTROPE as a business location lie in its solid industrial base, particularly with respect to the supply sector (e.g. automotive components), its focus on niches and high-quality products as well as – this goes above all for CENTROPE sub-regions in the new Member States – a rapid technological catching-up process and relatively low wage costs. The broad diversification of the industrial structure of the Central European Region is inter alia evidenced in the Cluster Observatory by the Stockholm School of Economics (which is based on numbers of employees). The strong points of the Central European Region include the automotive industry, financial services, petroleum and gas, transport, communications, shoe manufacturing, lighting fixtures and electronics accessories, energy generation and energy supply in Western Slovakia; in Eastern Austria, these areas are application-

and industry-oriented services, communications, financial services, transport, the construction industry, foodstuffs, mechanical engineering and tourism; in West Hungary, the core industries are the automotive industry, communications, foodstuffs, mechanical engineering, the construction industry, tourism, IT, leather, lighting fixtures and electronics accessories; and in South Moravia, these correspond to mechanical engineering and instrument manufacturing, IT and electrical engineering, textile and shoe manufacturing, foodstuffs, the chemical and pharmaceutical industries as well as energy generation and energy supply.

A clear sign of the economic clout of CENTROPE is also transmitted by existing and emerging clusters, i.e. networks of mutually co-operating enterprises, research facilities and public authorities. Starting in 2000, a number of cluster initiatives were launched in CENTROPE. The main focuses are on the following complexes: automotive industries/mechatronics/plastics, sustainable construction/timber/renewable energies/environment and health/health technology/wellbeing/health tourism.

Strengthening the human capital together

A well-trained workforce provides the backbone for growth and economic efficiency of the Central European Region. Roughly 250,000 students attend a total of 25 universities in CENTROPE. The share of specialised workers with secondary education (grammar school-leaving exam or comparable) is far above the European average. Moreover, the quota of persons with low qualifications is smaller in the region than on an EU-15 average. The fact that the labour market situation of this workforce is inferior to the general European level is partly due to the momentous restructuring processes of the last decade and partly the consequence of a relatively inflexible vocational training system. At the same time, however, the Central European Region – due to rapid economic growth – now also suffers from a lack of highly skilled specialists in some sectors of the economy. Thus it is the declared goal of the Central European Region to strengthen its human capital jointly and to deploy qualifications and skills where they are most needed.

Links:

CENTROPE Business & Labour Report 2007:

<http://centrope.info/baerdtnet/stories/7023>

European Cluster Observatory: www.clusterobservatory.eu

„Clusterland“ CENTROPE

Hardly any European region has missed out on focusing part of its economic policy on cluster formation. While the numerous cluster initiatives in the CENTROPE space differ with regard to their thematic orientation, structures or funding sources, the objectives are the same – to set up networks with partners from economy, research and administration in order to concentrate and evolve existing assets of the region.

“Cluster promotion” is tantamount to the networking of enterprises, research and training facilities as well as public administration around one specific thematic area or industry. Co-operatively, small and medium-sized companies can thus acquire information and develop ventures they could not tap or handle on their own due to a lack of time or funds. Research institutions gain access to enterprises for application-oriented research projects; large-scale corporations connect with suitable regional suppliers; the demand for training programmes and their availability are fine-tuned conjointly with the public administration – these are the objectives and expectations. A closer look at CENTROPE discloses different approaches to cluster initiative structuring and financing.

Clusters as an economic policy instrument

Cluster initiatives contribute to the (further) development of regional specialisations. To be able to prevail in the global competitive situation, it is important to build larger, cross-border strengths. With the PRO INNO Europe initiative, the European Commission thus supports networks of cluster regions – called “INNO Nets” –, where regional or national cluster policies are fine-tuned and jointly developed on a cross-border basis. With the exception of Vienna and Burgenland, the CENTROPE sub-regions are represented in the CEE-ClusterNetwork and e.g. prepare joint activities for the improved networking of research and economy or the marketing for third markets.

Some clusters are financed through public funds, others are not. Additional funding sources may be membership fees paid by cluster partners, sponsorship contributions or funds from regional, national or European funding pools. For example, projects for the development and management of clusters promoting specific regional or local assets are publicly tendered in the Czech Republic. Groups of at least 15 enterprises, research and development agencies as well as regional development organisations thus had to join forces to submit a bid. Action plans must be developed, a cluster manager appointed, and a joint office set up by June 2008. The Czech model demands serious commitment and above all a strong sense of initiative from the enterprises involved. Cluster management costs are publicly financed to the tune of 75% in the first year; 65%, in the second year; and 55%, in the third year.

Conversely, cluster management units in Lower Austria form part of the business agency of this federal province and act as hubs for their 80 to 190 partners from the fields of economy and science on the one hand and the different provincial authorities on the other hand. Here, too, financing is limited, although there is less of a focus on achieving the highest possible self-financing ratio. Enterprises are strategically and technically involved in the programme by means of regularly organised advisory board meetings.

Currently, there are 22 cluster initiatives in CENTROPE, with the main focus on automotive industries/mechatronics/plastics, sustainable construction and housing technologies/timber/renewable energies/environment and health/life sciences/wellbeing/health tourism, but also on cross-sector industries, such as information and communication technologies (IKT) or design.

The pioneers ...

The first of its kind in the CENTROPE region was the Pannon Automotive Cluster (PANAC) set up in West Hungary in 2001. The automotive sector is one of the most important industries of Hungary. Already in the COMECON era, Győr was a centre of bus production; after the political turnabout, the availability of well-trained specialised workers and relatively low wage costs attracted such automotive giants as Opel or Audi, which continue to dominate this sector (although the number of innovative small and medium-sized enterprises is growing). Through its Regional University Knowledge Centre of Vehicle Industry, Győr's Szechenyi University likewise aims for co-operation between economy and research. It is the task of PANAC – in whose development large-scale national and international enterprises were involved right from the beginning – to integrate the Hungarian automotive market, i.e. to fine-tune the needs of international corporations with the goods and services provided by national suppliers by means of qualification and benchmarking activities.

PANAC moreover shares its experience with the automotive cluster CENTROPE, a cross-border automotive and logistics platform for the entire CENTROPE region.

... and “automotive newcomers” in CENTROPE.

Over the past 15 years, the Slovak automotive industry has experienced an unprecedented boom. In 2006, 744,600 motor vehicles were produced here. According to the Slovak financial paper *Hospodárske Noviny*, the annual production of private cars in Slovakia will exceed the record threshold of 1.000,000 units in 2008. This makes Slovakia a leading country with respect to the number of cars produced per capita. The first international group to invest in Slovakia was Volkswagen in 1991, followed by Peugeot and KIA in 2006.

The ongoing development of the Automotive Cluster Western Slovakia – the first Slovak cluster initiative – is to bring regional automotive suppliers closer to large-scale corporations and to gradually strengthen their competitive edge in Slovakia and internationally. The networking of companies facilitates the joint use of distribution channels and infrastructure but also the canvassing of workers and the tapping of new technologies and research findings. Moreover, the division of tasks and the specialisation of the individual enterprises contribute towards cost reduction.

The Automotive Cluster Western Slovakia was networked across borders right from the beginning. The first development phase was financed through an INTERREG IIIA project. The co-operation with the Automotive Cluster Vienna Region dating from that time as well as the exchange of experience within CENTROPE and all of Europe will be further intensified in the future.

Clusters focus existing strengths ...

“You cannot tie a knot with just one hand.” This Mongolian proverb also holds true for providers of modern technologies and services in the information and telecommunications industry (ICT). In recent years, Vienna has become the ICT capital of Central Europe, as the city was chosen as company headquarters for activities in the Central and Eastern European markets by numerous multinational corporations. Roughly three fourths of the total turnover of the ICT industry in Austria are generated by companies domiciled in the federal capital. More than 8,000 enterprises active in the ICT sector have settled in Vienna. The overwhelming majority are SMEs, which were able to establish themselves in interesting niches, sometimes attaining notable market shares. Although small and medium-sized enterprises, due to their dimensions, can often move more flexibly and quickly, they are faced with numerous disadvantages regarding e.g. internationalisation, marketing and distribution. The solution lies in co-operation – and this also goes for enterprises in the ICT sector, the industry of “lone rangers”.

The Viennese ICT network Vienna IT Enterprises (VITE) enables enterprises as well as research, development and training facilities to enter into efficient co-operation ventures and puts a wide array of services at the disposal of its members. It is the prime objective of VITE to initiate innovative projects, network existing competences and strengthen the innovative clout and competitiveness of individual members. Today, the VITE network comprises 130 partners from all fields of the ICT sector. The majority of partner companies are SMEs, but global players like Microsoft and Seibersdorf Research, too, have joined the network.

VITE has also taken initial steps to promote international co-operation in the ICT sector with Austria’s immediate neighbours. ICT technologies are still assigned varying degrees of importance and are used with varying intensity within the CENTROPE

region. The IT CENTROPE network is to promote the transfer of know-how and technology, more intense general economic co-operation, co-operation in tenders and projects, the tapping of new labour markets as well as common research and development activities.

... can be flexibly evolved ...

The constantly changing demands on the economy call for the flexible adjustment of cluster focuses. The Green Building Cluster of Lower Austria shows ways and means in which a cluster initiative can thus grow and evolve. This cluster initiative was effectively repositioned in 2007 by combining the Timber Cluster and the original Green Building Cluster of Lower Austria. Today, the Green Building Cluster of Lower Austria covers the entire range of sustainable construction and housing.

With 190 partners, the Green Building Cluster of Lower Austria is the biggest of its kind in the CENTROPE region. The focus of its work is on the rehabilitation of old buildings, passive-energy homes and housing comfort. Activities are being gradually expanded to include renewable energy sources and ecological technologies. Since 2001, approx. 150 projects have been or are being implemented within the context of the Green Building Cluster and its two predecessors.

... or stay true to old traditions.

In developing a cluster of Czech furniture production in Brno, recourse was made to an old Czech tradition – the furniture industry. The first factories were established in the 19th century – above all in Brno, Koryčany and Bystřice pod Hostýnem – and in part have survived to this day. After the Second World War until the late 1980s, furniture for all of Eastern Europe was in fact produced in today's Czech Republic. When the old markets collapsed, it proved very difficult to find an alternative to cheaply manufactured mass items. A large pool of highly skilled workers paid relatively low wages as well as a slow catching-up process due to technical modernisation of the production companies were the consequence.

To this day, Moravia has remained the hub of furniture production in the Czech Republic – 40% of all furniture manufactured in this country come from here. With 35 partners, the Brno Furniture Cluster is one of the biggest of its kind on the newfangled Czech cluster scene. In addition to the often proclaimed objectives of economic development, innovation and job creation, this cluster also contributes explicitly towards reducing environmental pollution by adopting eco-friendly technologies. A prime goal of the cluster lies in increasing the quota of exports, above all to Canada, Russia, Ukraine and the German-speaking countries. Marketing strategies and instruments such as a multilingual product catalogue or a joint e-shopping system are already in the pipeline.

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Links:

PRO INNO Europe: www.proinno-europe.eu

Pannon Automotive Cluster (PANAC): www.autocluster.hu

Automotive Cluster CENTROPE: www.accentrope.com

Automotive Cluster Vienna Region (ACVR): www.acvr.at

Automotive Cluster Western Slovakia: www.trnava.sk

Vienna IT Enterprises (VITE): www.vite.at

Green Building Cluster of Lower Austria: www.bauenergieumwelt.at

Brno Furniture Cluster: www.furniturecluster.cz

“The USP of the Automotive Region CENTROPE lies in its multi-faceted character”: an interview with ACVR manager Peter Kuen

Starting with next year, approx. four million vehicles annually will be rolling off the assembly lines of the big automotive corporations in the extended CENTROPE space (a radius of roughly 300 km around Vienna). With the Automotive Cluster CENTROPE, a competence platform has been set up to generate synergy effects in training, research and production. We spoke to Peter Kuen of the Automotive Cluster Vienna Region about the opportunities and potentials of the CENTROPE Region to establish itself as an international automotive hub.

Mr. Kuen, you have been serving as cluster manager of the Automotive Cluster Vienna Region for the past two years. Could you explain in layman’s language what exactly a cluster is and what the functions of a cluster manager are?

There are many different definitions of what a cluster actually is. The Automotive Cluster Vienna Region (ACVR) is a cluster initiative of the Federal Provinces of Vienna and Lower Austria that was called into life to support enterprises in the region through information, projects and events. The tasks of a cluster manager are quite varied. One of the nicest aspects lies in the personal contacts with enterprises. Every year, we visit over 50 current and potential co-operation partners from the industry and speak about problems, projects and success stories directly on-site, as it were.

ACVR was created six years ago – what has changed in the region since its establishment?

Today, ACVR links more than 100 partners from business and research to a total of approx. 33,000 workers and Euro 4.5 billion annual turnover in Austria. Due to EU enlargement and the booming automotive production sites in the neighbouring new EU Member States Slovakia, Czech Republic and Hungary, ACVR has been involving the entire CENTROPE space with growing intensity in its work of recent years. Nearly 5% of all worldwide car production takes place in a radius of 300 km around Vienna; for this reason, very close, supraregional co-operation ventures with vehicle manufacturers, suppliers and organisations in the automotive environment in these countries are to contribute towards ensuring the position of CENTROPE as a business location as well as towards targeted job creation.

Isn’t the automotive industry one of the most highly networked sectors worldwide anyway? So why do we need regional networks?

Global networking is primarily limited to the level of top suppliers, which are closely and directly linked to manufacturers worldwide (the so-called “OEM”, or original equipment manufacturers). Among small and medium-sized enterprises, which

account for nearly 90% of all companies in CENTROPE, networking is less developed. Regional factors still have a major influence on the business activities of these enterprises. For example, when co-operating with research facilities, SMEs tend to prefer regional partners, either because there are no language problems, or because they can build on an already existing co-operative base.

What exactly do you mean by “regional”? Does co-operation end at provincial or national borders? And what is stronger – the competition between neighbouring regions or the co-operative potential?

It is the prime objective of networks in the automotive industry to focus existing competencies and to initiate innovative projects. To be able to make the best possible use of synergies and enable optimised know-how transfer, ACVR is constantly maintaining close contacts with enterprises and organisations in the automotive environment, both on a national and international level. Within Austria and within the CENTROPE Region, co-operation at cluster level is already institutionalised, and ACVR is integrated into all corresponding organisations.

To be able to meet the challenges of the growing common automotive market in the CENTROPE Region, a cross-border competence platform was established to create synergy effects in training, research and production – the Automotive Cluster CENTROPE. Since spring 2007, this co-operation platform, which is jointly operated by ACVR, the Automotive Cluster Western Slovakia and the Hungarian cluster PANAC, has been supporting know-how transfer between the partner companies of the individual clusters as well as the further qualification of enterprises in the region while also co-ordinating joint promotional and assistance projects. For example, a benchmarking project is implemented together with Hungary in order to enable companies to define their status quo and plan ahead.

Does the automotive location CENTROPE have a unifying USP?

Although it may sound paradoxical, the unifying USP probably lies in the multi-faceted character of CENTROPE as an automotive region: still relatively low wages, great innovative and financial strength, excellently trained manpower – and all this within the confines of a small region.

What are your target markets?

For the larger CENTROPE region, we are mainly interested in forging contacts with enterprises in South Korea and France with the objective of either motivating them to establish local subsidiaries or at least to enter into co-operation ventures. After all, automobile manufacturers from France and South Korea already operate production

plants in this region. But the markets of Russia and Ukraine, too, offer great potential for suppliers, which is why we are active in this direction as well.

In your opinion, what is the potential of the CENTROPE Region to position itself internationally as an automotive hub?

Well, the larger CENTROPE Region is already an established international automotive hub. Slovakia alone is on its way towards becoming the fifth-largest car manufacturing country worldwide, trailing only the U.S., Japan, China and Germany. With our USP, the CENTROPE Region might almost be called unique on a worldwide scale.

Links:

Automotive Cluster CENTROPE: www.accentrope.com
Automotive Cluster Vienna Region (ACVR): www.acvr.at
Pannon Automotive Cluster (PANAC): www.autocluster.hu
Automotive Cluster Western Slovakia: www.trnava.sk

Political Conference 2007 in Bratislava: CENTROPE ready for take-off

In March 2006, the CENTROPE partners formulated “Vision 2015”, a common master concept for the future development of the Central European Region. Eighteen months later, a detailed roadmap for concrete co-operation activities implemented by equal partners to gradually make Vision 2015 reality is nearing completion. The CENTROPE Political Conference, which for the first time took place in Bratislava with the motto “Ready for Take-off”, proved a strong sign of life of the Central European Region.

“Talking about CENTROPE means talking about a new quality of co-operation” – this sentiment put forward by Vladimír Bajan, Chairman of the Bratislava Self-Governing Region, in his opening statement was certainly shared by all participants in this year’s CENTROPE Conference on 26 November 2007. For the first time, this meeting of the 16 partners took place in the Slovak capital Bratislava. Representatives of the fields of economy and politics from all parts of CENTROPE spoke about their ideas for successful co-operation within the Central European Region, where many things have changed since the CENTROPE initiative was launched 50 months ago. All partner regions are now part of the European Union, border controls will be eliminated in December 2007, and the labour market, too, will be liberalised.

Vladimír Bajan agrees that this golden opportunity must be used for the benefit of CENTROPE: “The Central European Region is an ideal space for joint activities.” Specifically, Bajan addressed the co-operation between educational institutions in the region, which he believes should be further intensified, e.g. by setting priorities for common educational standards. After all, education is a crucial factor for the future of the region, he maintained. The Mayor of Sopron, Tamás Fodor, equally identified the necessity of novel training structures to meet rapidly changing needs. For Andrej Ďurkovský, Mayor of Bratislava, the capacities of institutions of higher learning must be stepped up and made accessible across borders throughout the region.

“CENTROPE is damned to succeed”

Or, as János Kondor, Chairman of the Association of Employers and Industrialists of Vas County, put it: “CENTROPE is damned to succeed. For this co-operation in Central Europe has a long tradition.” In his opinion, enterprises show how cross-border co-operation can function smoothly. The Governor of the Federal Province of Burgenland, Hans Niessl, is likewise convinced that “CENTROPE offers ideal preconditions for economic success. It is a new form of working together that calls for efficient infrastructure and a qualified workforce.” The Deputy Governor of the Federal Province of Lower Austria, Ernest Gabmann, agrees: “We are on the right track and want to make use of this opportunity – economically, culturally, but also with a view to environmental protection.”

These assessments were shared by the participating scientists. Peter Huber, an expert with the Austrian Institute of Economic Research and co-editor of the first CENTROPE Business und Labour Report, noted that the Central European Region disposes of excellent prerequisites for a variety of processes based on the division of labour. Already today, it creates locational advantages and cost-effective development opportunities, above all for small and medium-sized enterprises (SMEs), he claimed. In its turn, such a region needs strong infrastructure, more cross-border investment activities and intensified co-operation between public actors. Yet the successful exploitation of all available opportunities is contingent on focused and increasingly fine-tuned policies of all CENTROPE partners, he concluded. The CENTROPE Business und Labour Report, which will henceforth be published annually, offers a valuable basis towards this goal.

Bratislava Memorandum: “Long-term and Professional Co-operation”

As the previous CENTROPE Conferences, this year’s “summit” of governors, county presidents and mayors of the capital cities once more jointly adopted a document to serve as a milestone for the intensification of cross-border co-operation. In the Bratislava Memorandum “Long-term and Professional Co-operation”, the CENTROPE partners agreed to set up a common, multilateral co-operation management to serve as the backbone of future co-operation. To coincide with the beginning of the new EU funding period, a number of “strategic alliances” was moreover established with the objective of promptly implementing co-operation projects in a great variety of thematic fields and on a basis of true partnership. Thus the “Vision CENTROPE 2015” presented in 2006 is gradually being transformed from theoretical vision into tangible reality.

Tips and links: Clusters in CENTROPE

CENTROPE's landscape of clusters is broad and manifold. We find more than 22 cluster initiatives in the Central European Region. The spectrum ranges from the booming automotive industry to sustainable housing construction or health tourism.

South Moravia

Czech Furniture Cluster: furniture manufacturing has a long tradition in the region around Brno. The focus of this cluster is on increasing the quota of exports, above all to Canada, Russia, Ukraine and the German-speaking countries, and on the support of product development, innovation and research on the part of partner enterprises. The cluster was established in 2006 and currently has 35 partners.

www.furniturecluster.cz

The **CEITEC Bioinformatics Cluster** with its currently 15 members links IT enterprises, medical-technical laboratories and pharmacological companies to Brno's Masaryk University and University of Technology. The focus is on research and development projects.

www.ceitec-cluster.com

The Brno **Water Treatment Alliance** is a smaller, highly specialised network composed of 16 partners active in the fields of mechanical engineering, electronics and biotechnology. The strategic objectives of this cluster include the positioning of Czech water purification and treatment systems in the international market and joint research projects of cluster partners.

www.wateralliance.cz (in Czech only)

West Hungary

PANAC Automotive Cluster: this oldest cluster in CENTROPE was set up in 2000 by the Hungarian subsidiaries of Audi, Suzuki and Opel in co-operation with the established Hungarian company Rába and Győr's Széchenyi University. The number of small and medium-sized enterprises among the currently 83 cluster partners is increasing. Győr is the centre of Hungary's automotive industry; as one of seven innovation and development poles of the Hungarian economic development strategy, its special focus is on vehicle manufacturing.

www.autocluster.hu, www.autopolis.hu (in Hungarian only)

The **Pannon Mechatronics Cluster** is a successor to the electronics cluster and was established in 2005 by the Hungarian subsidiaries of large-scale international corporations such as flextronic or EPCOS. Today, the cluster has 44 partners from the areas of mechanical and plant engineering, component production, electronics and IT. The most important research partner is Budapest University of Technology and Economics.

www.pfa.org.hu

The **PANFA Timber and Furniture Cluster**, which was set up in 2001, comprises 127 partners along the entire value-creation chain for timber, ranging from forestry to furniture production/timber engineering. Renewable energies/biomass is another field of its activities. With Sopron University and its Faculties of Forest Engineering and Timber Industry, the most important and best-established training facility for this industry, too, has joined this cluster.

www.panfa.hu

The **Pannon Thermal Cluster** is a network of both famous and less well-known thermal and curative spas in Hungary (Bük, Sárvár, Héviz, etc.). The main task of this cluster lies in joint PR and marketing activities for the international positioning of Hungary as a spa destination (set up in 2001, 38 partners).

www.gyogyturizmus.hu

The **Pannon Cluster for Renewable Energy** is a newer cluster in West Hungary. At the moment, it has 11 partners from the fields of planning, energy production, counselling and supply.

www.panenerg.hu

Arts and crafts, regional products and village tourism are the focal areas of the **Pannon Local Products Cluster**. The key strategic objective is to position local and regional foodstuffs, arts and crafts in the national and international market, e.g. by means of a joint e-shop.

www.pannonproduct.hu

Large-scale companies as well as micro enterprises in the textile and garment industries are among the 30 partners of the **Pannon Textile Cluster**. The cluster management offers support e.g. through market research and trend watching.

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www.pantex.hu

The Pannon Logistics Cluster networks such key stakeholders as the Danube port Győr-Gönyű and the airport Győr-Pér as well as another 26 enterprises from the logistics business.

<http://www.panlogklaszter.hu>

Western Slovakia

As the first such initiative in Slovakia, an **Automotive Cluster Western Slovakia** is currently being developed in and around Trnava to bring regional automotive suppliers closer to large-scale corporations and to improve their competitive clout in Slovakia and abroad. Cluster management services are scheduled for takeoff in 2008.

Vienna Region

The **Automotive Cluster Vienna Region (ACVR)** is a joint initiative of the Federal Provinces of Vienna and Lower Austria. Cross-sector technologies are a main asset of the Vienna Region: in addition to traditional automotive suppliers, electronics and telematics enterprises as well as a variety of service companies, research, development and training facilities are ACVR partners.

www.acvr.at

Vienna

Vienna IT Enterprises (VITE) is a network of IT enterprises, research, development and training facilities in Vienna. Co-operation with neighbouring regions is intensified in the context of the IT CENTROPE network.

www.vite.at

The focus of **Life Science Austria Vienna Region (LISA VR)** is on enterprises and start-ups in the fields of biotechnology and innovative medical technology. This central life science consultancy and co-ordination point in the Vienna Region was set up in 2002 to offer consultancy services relating to company start-ups, business plan development and financing/funding.

www.lisavr.at

The creative industries network **departure** supports entrepreneurs and company founders active in the creative industries, e.g. in fashion, music, the audiovisual sector, multimedia, design, publishing, the art market and architecture. In order to specifically use and further develop the potential of Vienna's creative industries, departure wirtschaft, kunst und kultur gmbh was set up in 2003 as a central point of contact and funding organisation.

www.departure.at

Lower Austria

With 190 partners, the **Green Building Cluster** is the biggest cluster in CENTROPE. Its activities are geared towards the upgrading of older houses according to low-energy standards, the construction of multi-storey buildings in line with passive-energy standards, healthy interior environments in housing as well as towards the multi-industry focus "continuous improvement process" (CIP). Activities are being gradually expanded to include renewable energy sources and ecological technologies.

www.bauenergieumwelt.at

The **Plastics Cluster Lower Austria** is part of a plastics cluster extending across the Federal Provinces of Upper Austria, Lower Austria and Salzburg. Key services such as information and PR are handled by the central cluster office in Linz, while regional consultancy of member enterprises and research facilities as well as the development of activities with a specifically Lower Austrian slant (e.g. bioplastics) are managed by the Lower Austrian cluster management.

<http://www.kunststoff-cluster.at>

The target group of the **Wellbeing Cluster Lower Austria** includes enterprises, institutions and actors from the fields of health tourism, preventive medicine, natural products, ancillary health services, research and training as well as regional suppliers.

www.wellbeingcluster.at

The foodstuff sector is one of the most important industries of Lower Austria. The **Foodstuff Initiative Lower Austria** supports enterprises from this sector along the entire value-creation chain – agricultural enterprises, food-processing industries as well as food wholesalers and retailers – and covers meat, grain, fruit and vegetables.

www.ecoplus.at

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Burgenland

The focus of the 20 partner companies of the **Plastics Cluster Burgenland**, some of which operate subsidiaries in the neighbouring countries (but also in Asia), is on joint staff qualification measures and internationalisation activities. The cluster is managed by the Economic Chamber of Burgenland.

www.kunststoff-burgenland.at

With currently 22 partners, the **ICT Cluster Burgenland** was set up around the research and know-how centre of the ICS curriculum organised by the University of Applied Sciences Eisenstadt on the one hand and locally established IT companies on the other hand. The cluster was initiated by FMB Facility Management Burgenland GmbH, a subsidiary of WIBAG and the operator of 6 technology centres in Burgenland.

www.ict-burgenland.at