SWOT Analysis
Results Of The Regional Survey

Workshop 27./28. Feb. 06
Overview

- Introduction / Impressions of Vienna
- Strategic Concepts and City Marketing in Vienna
- SWOT Analysis
  - Economic Issues
  - Education and Research & Development
  - Cluster Development
  - Transport Infrastructure
  - Promotional City Marketing / City Marketing in the narrower Sense
  - Strategic & Urban Development Planning
  - Cooperations and Networks
Introduction / Impressions of Vienna
Vienna

- 23 City quarters
- 1.6 Mio habitants

![Vienna population chart]

![Vienna cityscape image]
Images of Vienna

Vienna a cultural city
- Attractive for tourists
- Many theatres and concert halls
- World cultural heritage
Images of Vienna

Vienna a green city

- 48% of the surface is greenspace
- Important aspect for the quality of life
Images of Vienna

Signs of Vienna

- Stephansdom
- Riesenrad
Strategic Concepts and City Marketing in Vienna
Integrative City Marketing

Promotional City Marketing/
City Marketing in the narrower sense
- City promotion
- Business development
- Tourism marketing
- Real estate management
- Retail management
- Organisation and marketing of conventions, trade fairs and other events

Urban Development Planning
- Urban development and regeneration policy
- Housing policy
- Infrastructure policy
- Local development planning
- Landscape planning
- Participation
- Monitoring

Strategic Planning
- SWOT-Analysis
- Vision strategies and fields of action
- Sector development policy
- Cluster management
- Strategic projects (action plan)

Cooperations and Networks
- Cooperations on the urban-regional level
- City-to-city cooperations
- Public-private partnerships (PPP)
- Cross-border networks
- New urban governance
- Representation and lobbying
Integrative City Marketing in Vienna

Promotional City Marketing/
City Marketing in the narrower sense
- WIFI Wien
- Vienna Business Agency
- Vienna Tourist Board
- Stadt Wien Marketing und
  Prater Service GmbH
- Wiener Messe Besitz GmbH

Urban Development Planning
- City of Vienna,
  Section for Urban Development
  and Urban Planning (MA 18)

Urban Development Plan
1984, 1994, 2005
+ Sectoral Plans and Concepts

Strategic Planning
- City of Vienna
  Department of Building,
  Section: Planning

  Strategic Plan 2000, 2004

Cooperations and Networks
- Various Actors

  Centrope
  Jordes+
  Vienna Region
  PGO
  TECNOMAN
Placing Vienna and Bratislava

Strategic Concepts and City Marketing

Vienna Region
SWOT Analysis: Economic Issues
Economic issues

**Strengths**
- High productivity of Vienna’s economy

**Weaknesses**
- Risk of growing unemployment

Source: Mayerhofer, S.43

Source: Eigene Darstellung auf Grundlage von Eurostat
Economic issues

Strengths
- High productivity of Vienna’s economy
- Growing level of active direct investments

Weaknesses
- Risk of growing unemployment
- No growth of passive direct investments

Source: Mayerhofer (2003), S.31
Source: Mayerhofer (2003), S.32
Economic issues

**Strengths**
- High productivity of Vienna’s economy
- Growing level of active direct investments
- Good export ratio with eastern European countries
- High incomes

**Weaknesses**
- Risk of growing unemployment
- No growth of passive direct investments
- Export ratio is beyond the Austrian average

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**Jährlich verfügbares Einkommen der Haushalte (2001)**

<table>
<thead>
<tr>
<th>City</th>
<th>EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Madrid</td>
<td>10000</td>
</tr>
<tr>
<td>Berlin</td>
<td>12000</td>
</tr>
<tr>
<td>Brüssel</td>
<td>16000</td>
</tr>
<tr>
<td>Paris</td>
<td>13000</td>
</tr>
<tr>
<td>Amsterdam</td>
<td>16000</td>
</tr>
<tr>
<td>Wien</td>
<td>18000</td>
</tr>
<tr>
<td>Helsinki</td>
<td>20000</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>24000</td>
</tr>
</tbody>
</table>

Source: Eigene Darstellung auf Grundlage von Eurostat
Economic issues

**Strengths**
- High productivity of Vienna’s economy
- Growing level of active direct investments
- Good export ratio with eastern European countries
- High incomes

**Weaknesses**
- Risk of growing unemployment
- No growth of passive direct investments
- Export ratio is beyond the Austrian average
- No international specialization of service sector
- Concentration of the service sector on problematic fields like public services

*Source: MAYERHOFER, S. 61*
**Economic issues**

**Strengths**
- High productivity of Vienna’s economy
- Growing level of active direct investments
- Good export ratio with eastern European countries
- High incomes

**Opportunities**
- Vienna is situated at the border of the new markets
- New markets can create new impulses for Vienna’s economy

**Threats**
- Income of eastern European countries is lower than Vienna’s income situation

**Weaknesses**
- Risk of growing unemployment
- No growth of passive direct investments
- Export ratio is beyond the Austrian average
- No international specialization of service sector
- Concentration of the service sector on problematic fields like public services

*Source: Broschüre der Industriellenvereinigung Wien*
SWOT Analysis: Education and Research Development
Education and Research & Development

Strengths
• Quite good education in natural-science subjects

Weaknesses
• General level of education is low
MAYERHOFER, P., Zweiter Bericht zur internationalen Wettbewerbsfähigkeit Wiens, WIFO, Wien, 2003
### Education and Research & Development

#### Strengths
- Quite good education in natural-science subjects
- Many employees in research and development

#### Weaknesses
- General level of education is low
- Just a few employees in knowledge intensive services
- Lack of academics and researchers

#### Opportunities
- Research and development in Bratislava

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**SWOT Analysis**

Placing Vienna and Bratislava

266.118 | Project 3
Employment in research and development

Employment in knowledge-intensive services

eigene Darstellung, Daten aus WKO Wirtschaftsprofil 2005-11-29
Education and Research & Development

**Strengths**
- Quite good education in natural-science subjects
- Many employees in research and development
- Energy partnerships

**Weaknesses**
- General level of education is low
- Just a few employees in knowledge intensive services
- Lack of academics and researchers
- Relatively low outcome in research and development (expenditures/output)

**Opportunities**
- Research and development in Bratislava
- Increasing significance of biotech and pharmacy industries
- Need for alternative energy sources

**Threats**
- Insufficient capacities in technology-based education
MAYERHOFER, P., Zweiter Bericht zur internationalen Wettbewerbsfähigkeit Wiens, WIFO, Wien, 2003
**Strengths**
- Quite good education in natural-science subjects
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- Energy partnerships

**Weaknesses**
- General level of education is low
- Just a few employees in knowledge intensive services
- Relatively low outcome in research and development (expenditures/output)
- Lack of academics and researchers
- Lack of willingness to cooperate with other companies and countries
- Language barriers

**Opportunities**
- Increasing significance of biotech and pharmacy industries
- Research and development in Bratislava
- Need for alternative energy sources
- Increasing willingness to cooperate on an European and international level

**Threats**
- Insufficient capacities in technology-based education
MAYERHOFER, P., Zweiter Bericht zur internationalen Wettbewerbsfähigkeit Wiens, WIFO, Wien, 2003
SWOT Analysis: Cluster Development
Basic knowledge on Clusters in Vienna

Life Science Cluster, ICT Cluster, Automotive Cluster (?), Creative Industries

![Graph showing FFF-förderungen zeigen Stärken der Wiener Unternehmen](image)
Cluster Development

Strengths

- Strategic instruments available
- Technical infrastructure for clusters available/under construction
Cluster Development

**Strengths**
- Strategic instruments available
- Technical infrastructure for clusters available/under construction

**Weaknesses**
- Network structures not yet developed in ICT, Creative and Automotive Industries
- Low interaction between companies, authorities and education
- Small number of spin-offs
- Climate for innovation low
Swot Analysis

Cluster Development

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- Technical infrastructure for clusters available/under construction

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- Network structures not yet developed in ICT, Creative and Automotive Industries
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- Small number of spin-offs
- Climate for innovation low

Threats
- Relatively low sums spent on R&D in Europe
- Financial support of the EU is limited
HIGH-TECH-ORIENTIERUNG DES GRÜNDUNGSGESEHENS IST IN WIEN DURCHSchnittLICH

<table>
<thead>
<tr>
<th>Region</th>
<th>Employment (000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Österreich</td>
<td>10</td>
</tr>
<tr>
<td>Deutschland</td>
<td>5</td>
</tr>
<tr>
<td>Hamburg</td>
<td>7</td>
</tr>
<tr>
<td>Rhein-Ruhr</td>
<td>4</td>
</tr>
<tr>
<td>Stadt, Frankfurt</td>
<td>12</td>
</tr>
<tr>
<td>Umland Frankfurt</td>
<td>8</td>
</tr>
<tr>
<td>Frankfurt</td>
<td>6</td>
</tr>
<tr>
<td>Stadtb. Köln</td>
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<td>5</td>
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<tr>
<td>Köln</td>
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<tr>
<td>Stadt, München</td>
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<td>Umland München</td>
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<tr>
<td>Wien</td>
<td>8</td>
</tr>
</tbody>
</table>

100 % = alle Gründungen aller Branchen, 2000/2001

Employment in Life Science (Vienna Region)

Quelle: Synthese, Sonderauswertung im Auftrag der MA27
Cluster Development

**Strengths**
- Strategic instruments available
- Technical infrastructure for clusters available/under construction
- Life Science as established cluster
- Global players (leading companies) existing

**Weaknesses**
- Network structures not yet developed in ICT, Creative and Automotive Industries
- Low interaction between companies, authorities and education
- Climate for innovation low
- Small number of spin-offs

**Opportunities**
- Globalisation - focus on export, highly specialised products
- Biotechnology and bioinformatics as promising fields
- Growing together of the two cities – synergies

**Threats**
- Relatively low sums spent on R&D in Europe
- Financial support of the EU is limited
- Globalisation - Global players without local roots; individuality
- Munich as competitor
- Rejection of genetic manipulation
SWOT Analysis: Transport Infrastructure
Transport Infrastructure

Strengths
- Good accessibility
Good accessibility

Inter-regional road infrastructure

Source: www.vieden-bratislava.sk

Priority railway projects

Source: European Commission, 2005
## Transport Infrastructure

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Good accessibility</td>
<td>- Slow transport connections between Vienna and Bratislava/logistics</td>
</tr>
<tr>
<td>- City-regional cooperation in public transport</td>
<td>- Bad navigability of the Danube</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Cooperation of the airports</td>
<td>- Ecological impacts of (ship) transport</td>
</tr>
<tr>
<td></td>
<td>- quality of life</td>
</tr>
</tbody>
</table>
Bad navigability of the Danube / Ecological impacts of (ship) transport – quality of life

Source: Industriellenvereinigung Österreich
SWOT Analysis: Promotional City Marketing / City Marketing in the narrower Sense
Promotional City Marketing / City Marketing in the narrower Sense

<table>
<thead>
<tr>
<th>Strengths</th>
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</tr>
</thead>
</table>
| - Willingness to spend money on city marketing  
- Tourism marketing (webpage, fairs, image)  
- Promotion of „quality of life“-issues  
- Marketing for public institutions and services (e.g. Wiener Linien) → inward orientation | - Lack of a self-contained marketing section (coordinating centre)  
- Old fashioned image, e.g. Vienna as „city of white horses and singing boys“  
- Deficits in real estate management and marketing, e.g. lack of an online database |

<table>
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<tr>
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</table>
| - International studies on „quality of life“  
- Art and culture as sustainable pull factors | - Neglect of social and environmental interests due to a predominant economic focus  
- Neglect of inward orientation  
- Museumification of Vienna |
SWOT Analysis: Strategic & Urban Development Planning
### Strategic Planning & Urban Development Planning

#### SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Orientation towards cooperation with Central and South-Eastern Europe</td>
<td></td>
</tr>
<tr>
<td>- Experience in urban development planning</td>
<td></td>
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<tr>
<td>- Required resources available (employees, data, etc)</td>
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<tr>
<td>- Integration of a regional perspective into the STEP05</td>
<td></td>
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<tr>
<td>- Insufficient involvement of private actors and NGOs</td>
<td></td>
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<tr>
<td>- Lack of a legal framework and insufficient coordination</td>
<td></td>
</tr>
<tr>
<td>- Lack of internationality (external experts, documents only available in German,...)</td>
<td></td>
</tr>
<tr>
<td>- Abuse of planning process for election campaigns (politicization)</td>
<td></td>
</tr>
<tr>
<td>- Lack of action-oriented approaches</td>
<td></td>
</tr>
<tr>
<td>- Lack of timetables and clear competences (e.g. steering committee)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
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</tr>
</thead>
<tbody>
<tr>
<td>- Vienna as hub for Central and South-Eastern Europe</td>
<td></td>
</tr>
<tr>
<td>- Increasing importance of environmental technologies, medical science and health</td>
<td></td>
</tr>
<tr>
<td>- European Football Championship as engine for urban development</td>
<td></td>
</tr>
<tr>
<td>- New cooperations in Central Europe</td>
<td></td>
</tr>
<tr>
<td>- Stable population/growth of population</td>
<td></td>
</tr>
<tr>
<td>- Unchallenged position as capital city</td>
<td></td>
</tr>
<tr>
<td>- Budapest as a potential hub of Central and South-Eastern Europe</td>
<td></td>
</tr>
<tr>
<td>- Sceptic view on new developments</td>
<td></td>
</tr>
<tr>
<td>- Cultural heritage (UNESCO) and monumental protection inhibit future development</td>
<td></td>
</tr>
<tr>
<td>- Strategic development areas within the city's borders are in the possession of external actors (e.g. National Railways)</td>
<td></td>
</tr>
</tbody>
</table>
SWOT Analysis: Cooperations and Networks
## Cooperations and Networks

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>Experienced in developing cross-border</td>
<td>Insufficient involvement of neighbouring countries and cities in Centroe</td>
</tr>
<tr>
<td>cooperations and networks</td>
<td>(not adequately represented in the steering committee)</td>
</tr>
<tr>
<td>NGOs and Chambers support existing networks</td>
<td>No involvement of municipalities in PGO</td>
</tr>
<tr>
<td>PGO can represent interests of the three</td>
<td>Lack of administrative bodies, independent of national interests</td>
</tr>
<tr>
<td>federal states</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two European capitals (Vienna and Bratislava)</td>
<td>Sceptic view on collaboration with Middle- and Eastern European countries in parts of the Austrian population</td>
</tr>
<tr>
<td>within short distance</td>
<td>Economical dominance of Vienna as a cause for distrust in the region</td>
</tr>
<tr>
<td>Involvement of external expertise and know-how</td>
<td></td>
</tr>
<tr>
<td>in developing Public-Private-Partnership models</td>
<td></td>
</tr>
</tbody>
</table>
Thank you for your attention!