

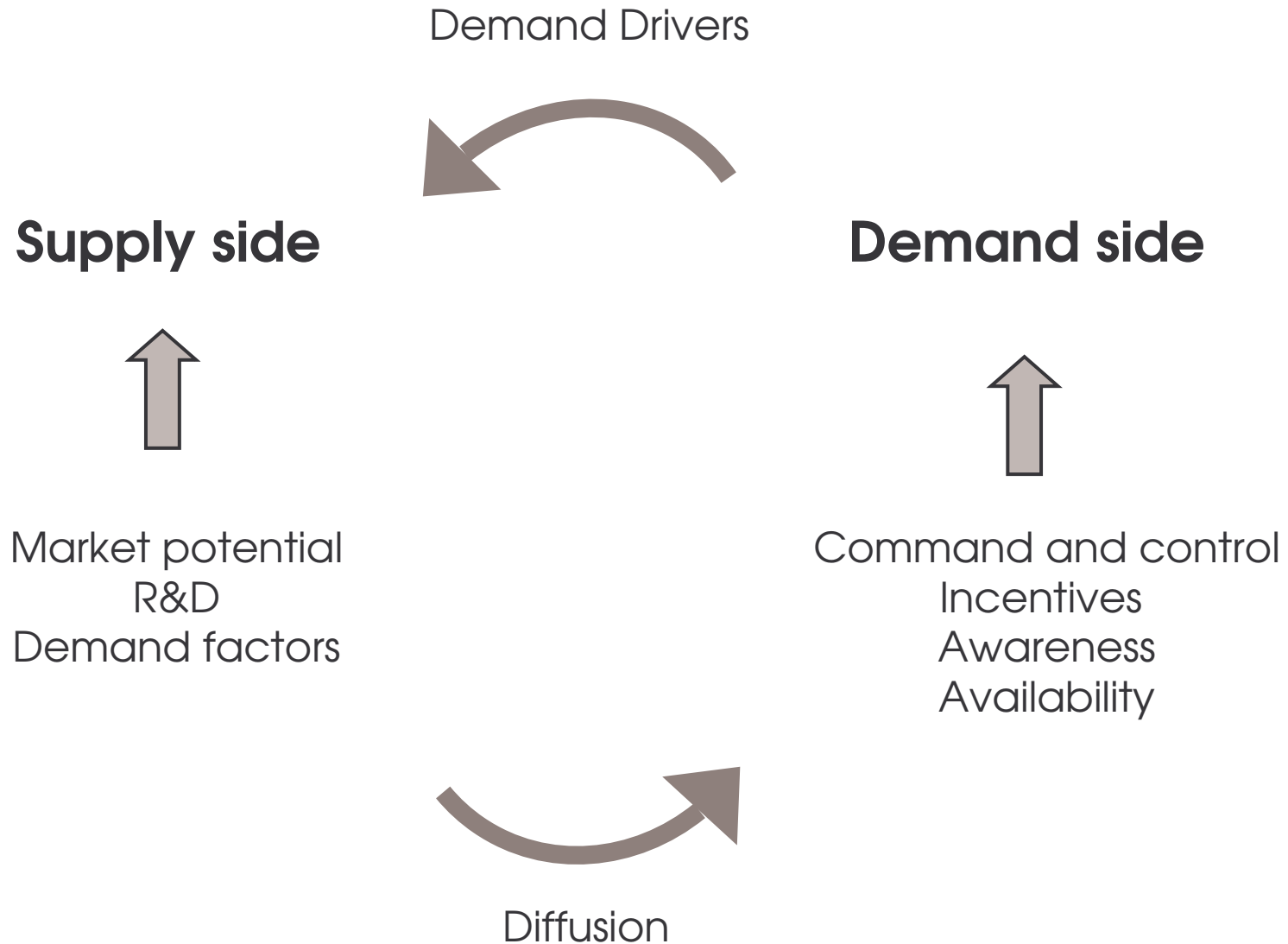
Dynamics in the Environmental Industry: The Case of Austria

ANGELA KÖPPL

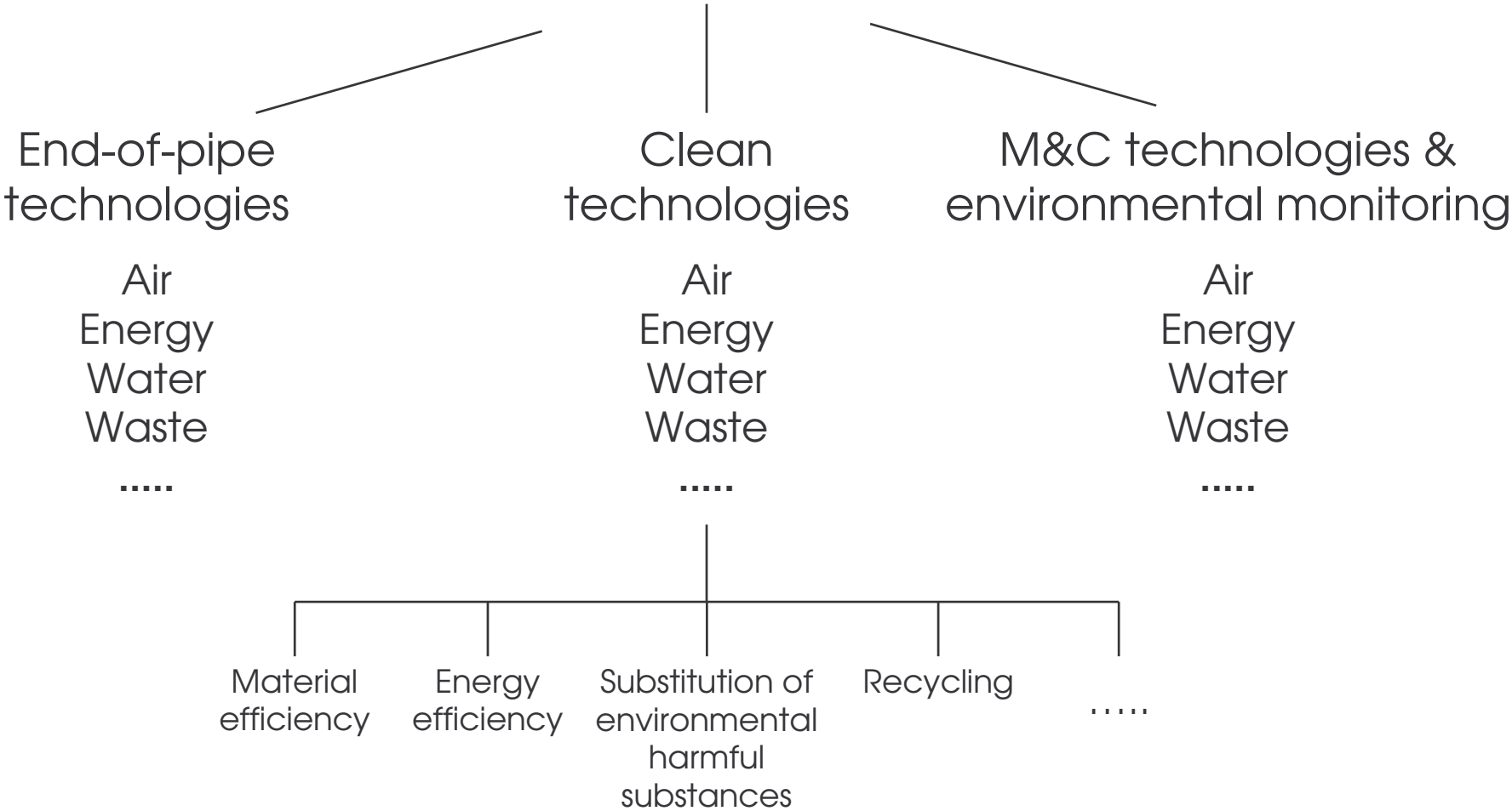
FORSCENE Workshop

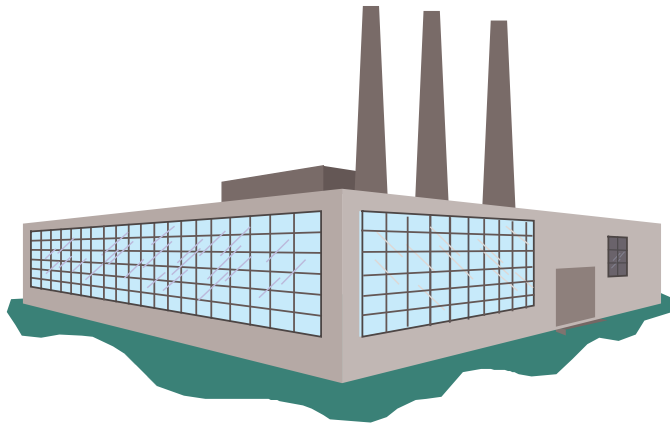
Vienna, October 23, 2006

Supply and demand drivers for Environmental technologies



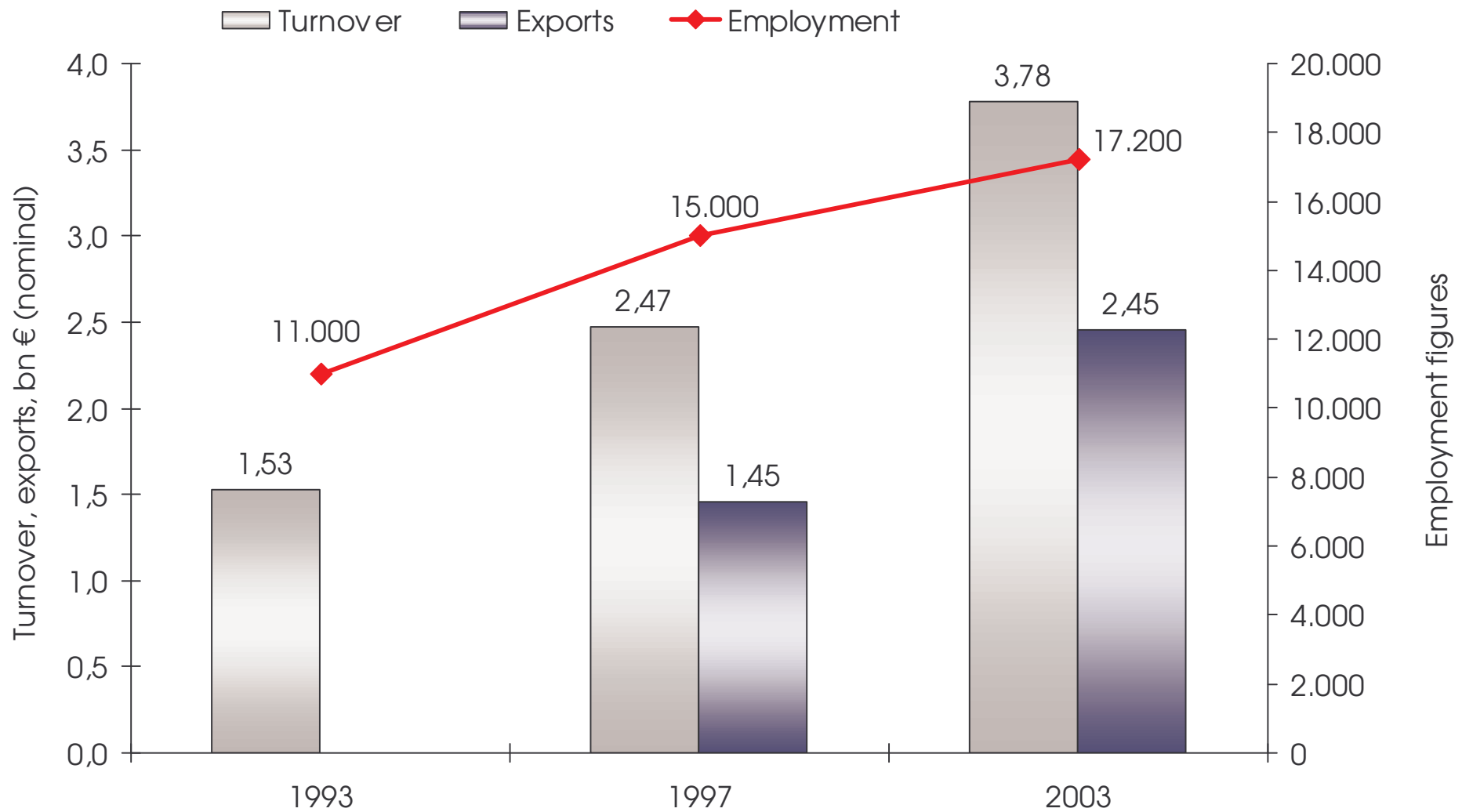
Environmental technologies





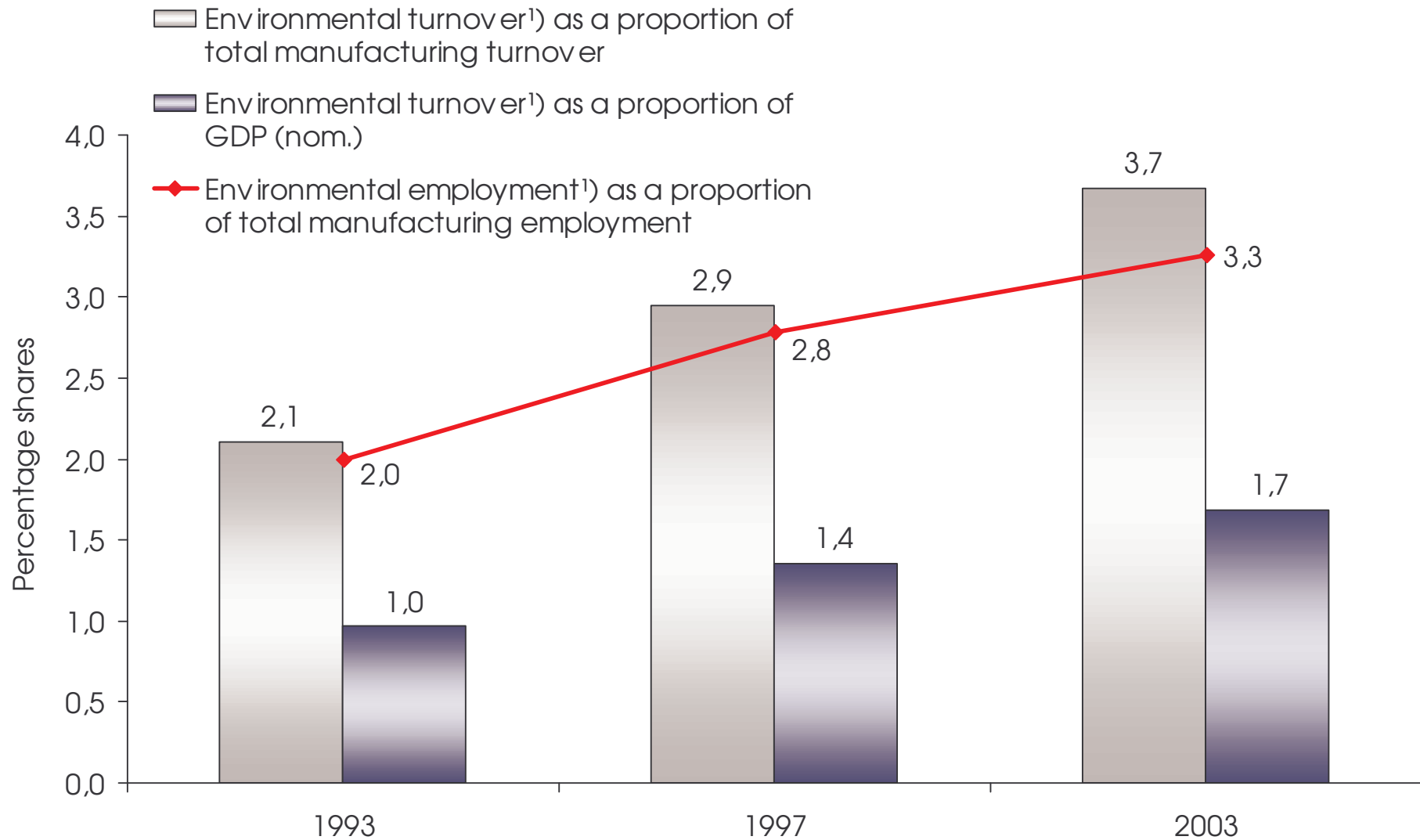
Companies

1993	1997	2003
248	315	331



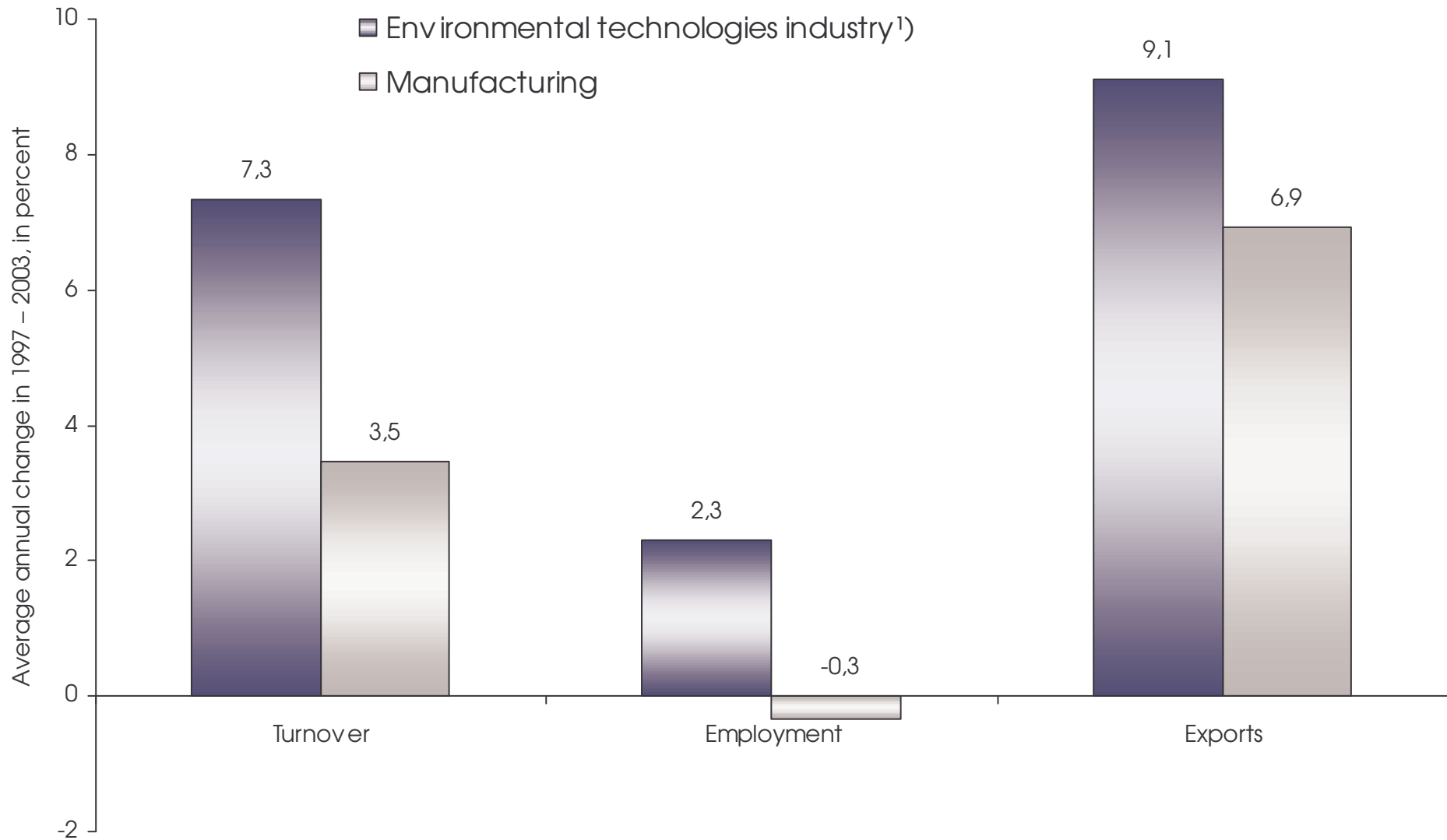
Source: WIFO surveys 1995, 2000, 2005, - estimate.

Relative importance of the environmental technology industry, 1993 - 2003



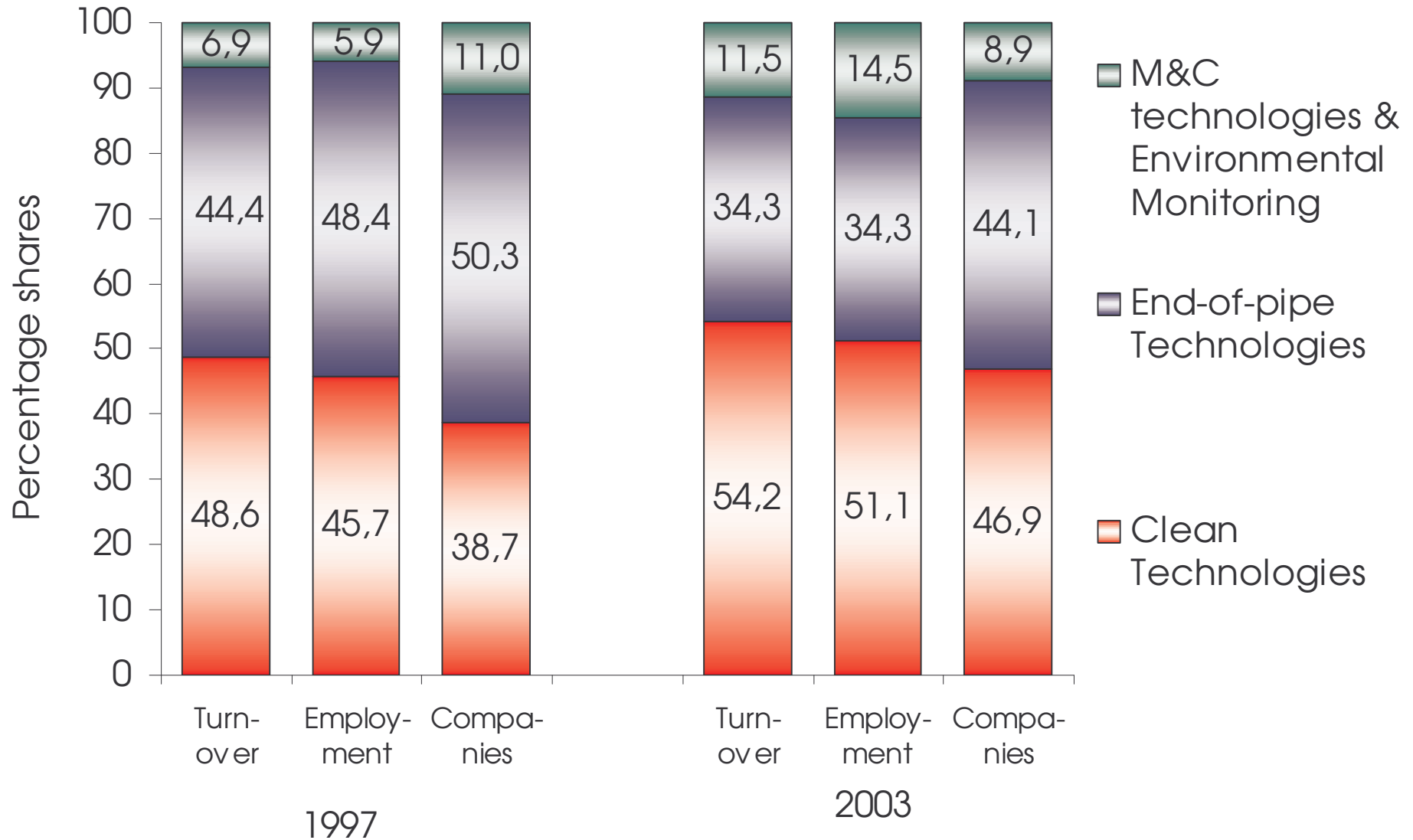
Source: WIFO surveys 1995, 2000, 2005, WIFO calculations, Statistics Austria: economic statistics, Austrian foreign trade database. - ¹⁾ estimate.

Economic indicators – annual growth rates in 1997 – 2003



Source: WIFO surveys 2000, 2005, WIFO calculations, Statistics Austria: economic statistics, Austrian foreign trade database. ¹⁾ estimate.

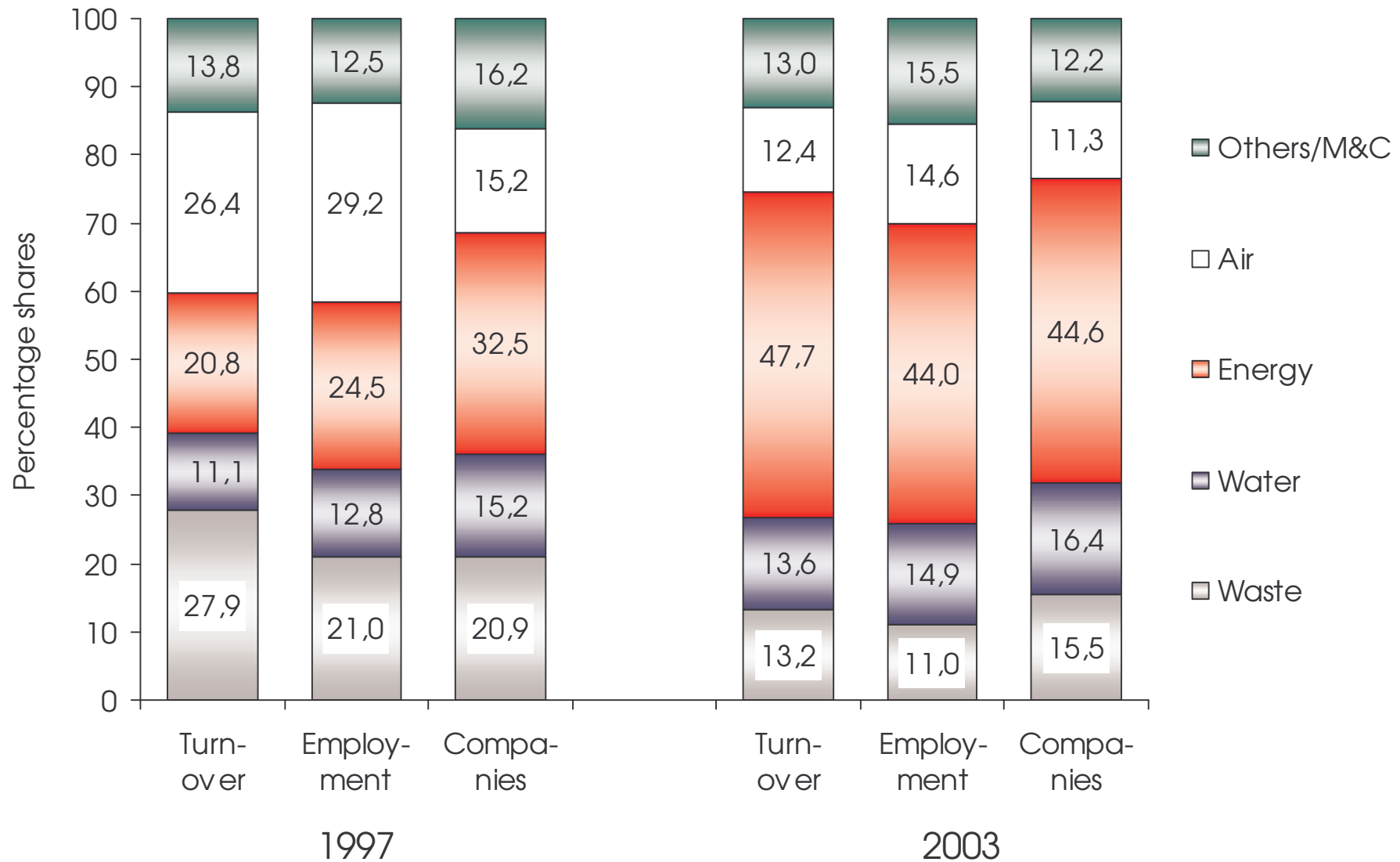
Environmental activities as share of the environmental industry, 1997 and 2003



Companies are assigned by their main product.

Source: WIFO surveys 2000, 2005.

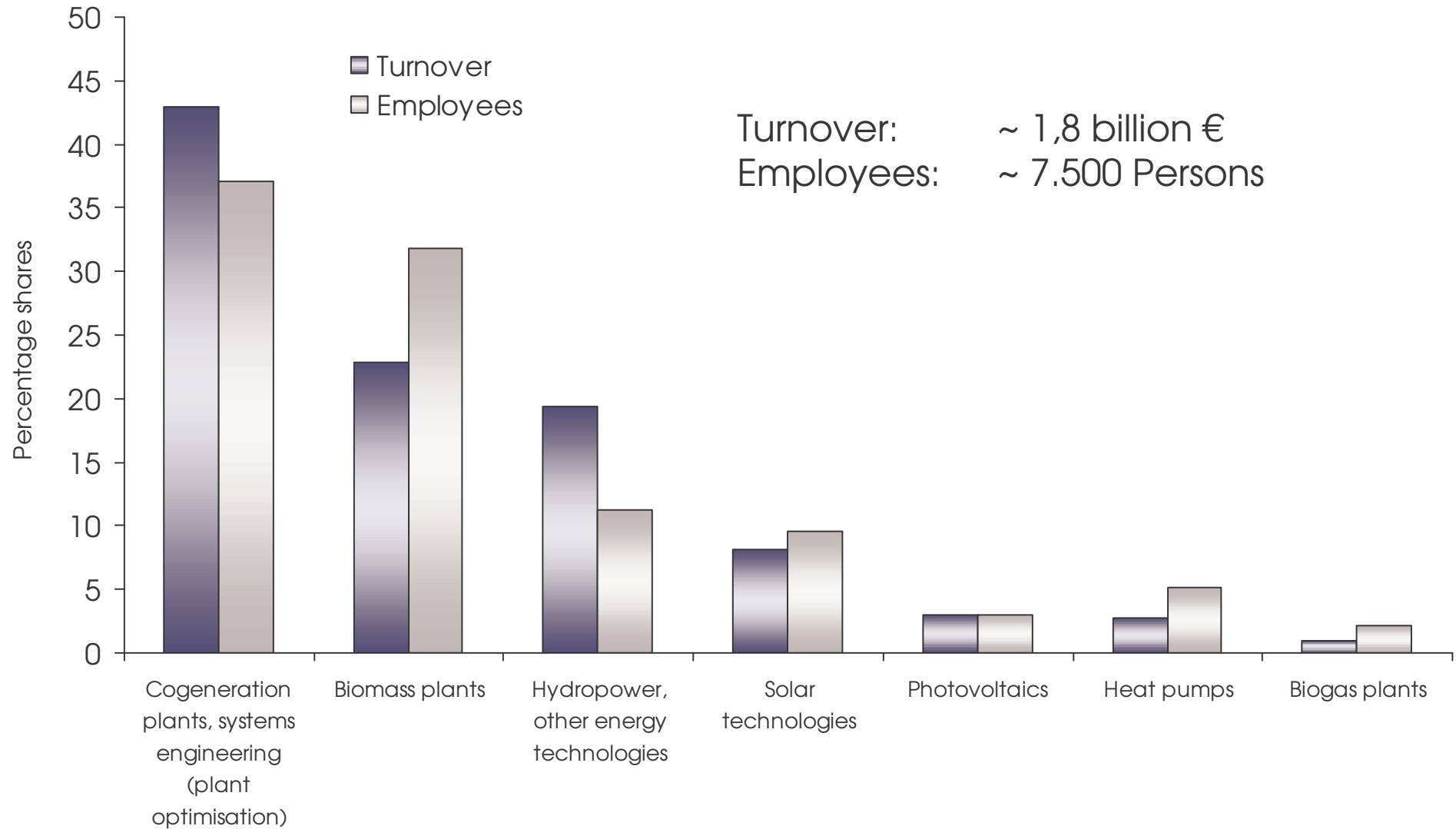
Environmental sectors as share of the environmental industry, 1997 and 2003



Companies are assigned by their main product.

Source: WIFO surveys 2000, 2005.

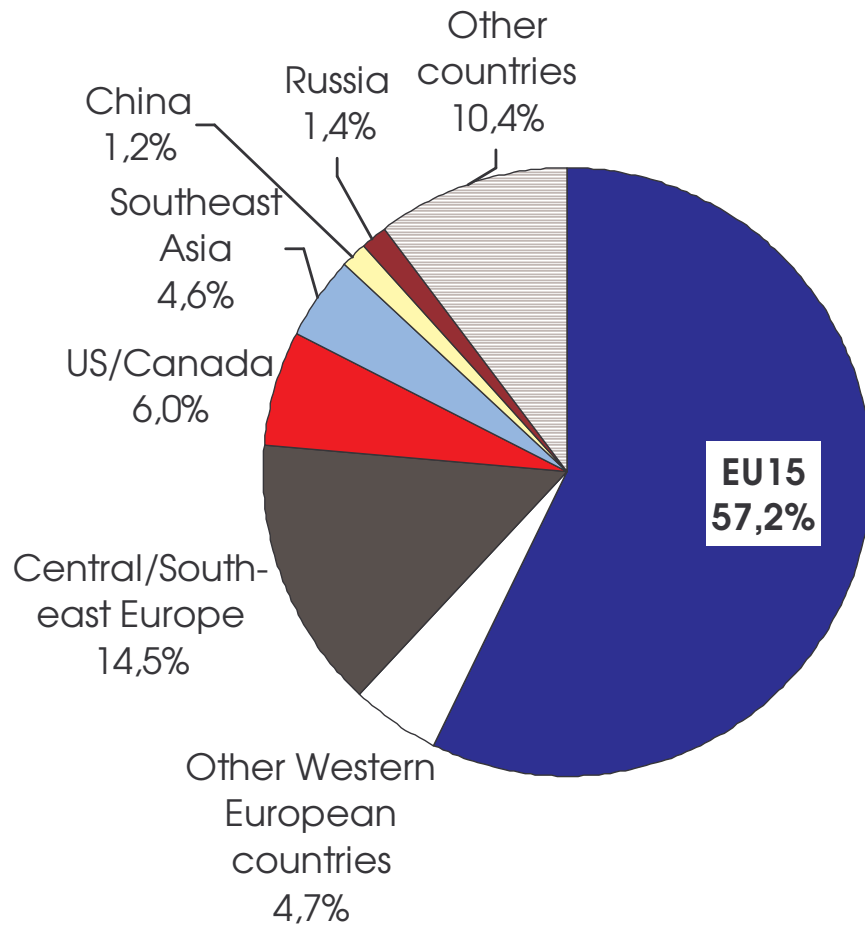
Clean energy technology product segment 2003, estimate



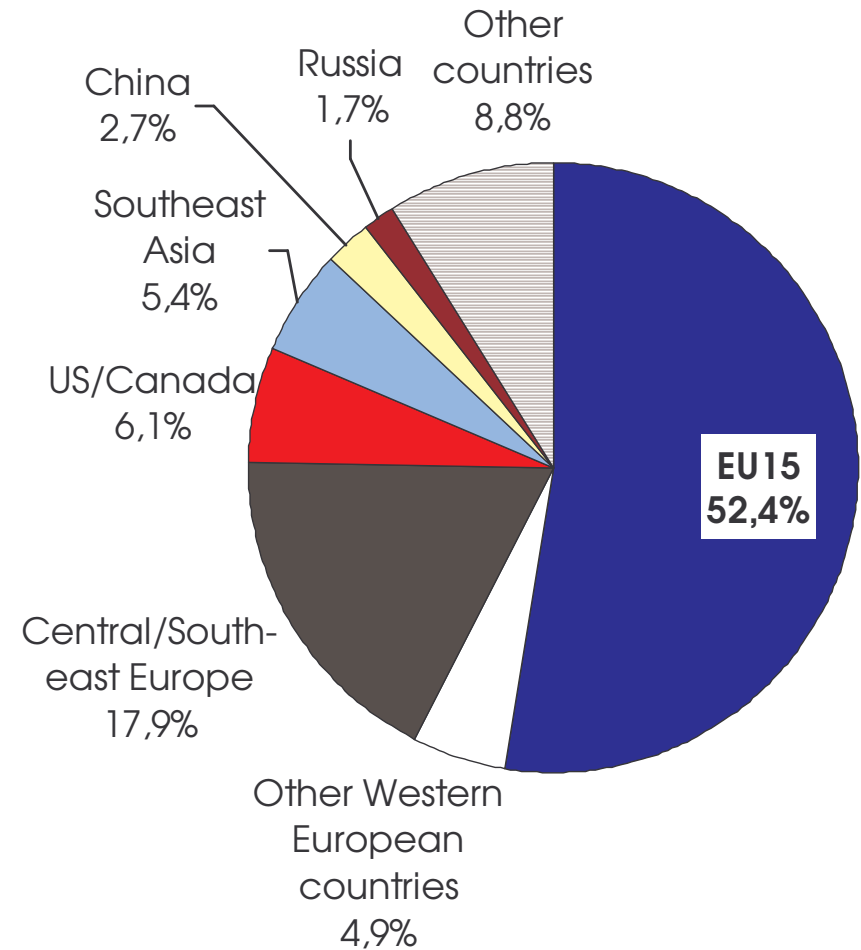
Companies are assigned by their main product.
Other energy technologies: wind power, bio diesel, geothermal systems - estimate.

Source: WIFO survey 2005.

Total exports



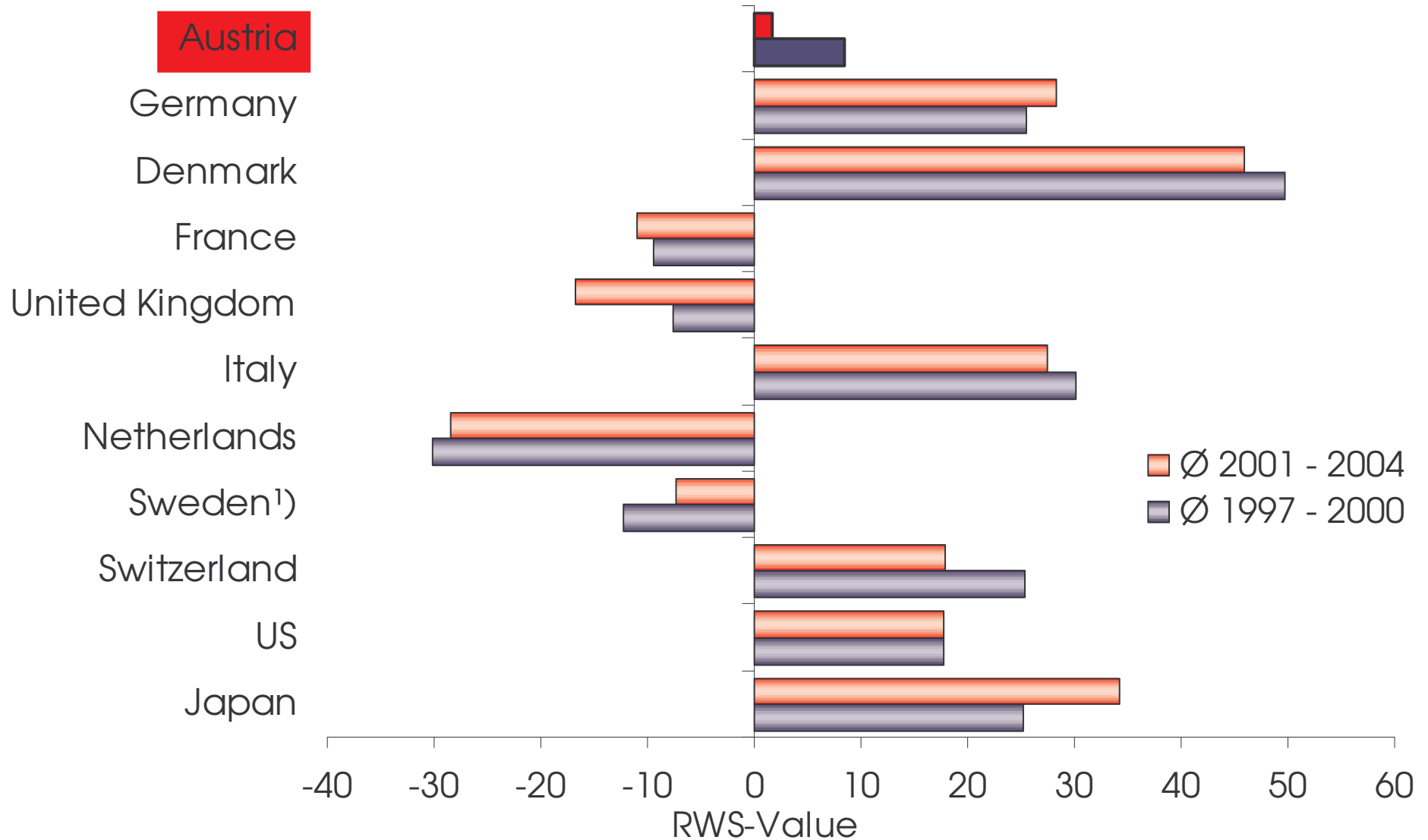
Exports of environmental technology



Source: UN database, Harmonised System 1996, definition of environmental technology goods as per OECD/COM/TD/ENV(2000)86/FINAL, WIFO calculations dollar-based.

	Total trade	Trade with environmental goods
Average share in percent		
Germany	14,5	19,3
US	15,0	18,0
Japan	10,0	14,1
<hr style="border: 2px solid red;"/>		
Denmark	1,1	1,7
Sweden ¹⁾	2,0	1,8

Relative competitive position of Austria in its trade with environmental goods (RWS-Value)



Source: UN database, Harmonised System 1996, definition of environmental technology goods as per OECD/COM/TD/ENV(2000)86/FINAL, WIFO calculations dollar-based ¹⁾ Ø 2001 – 2003.

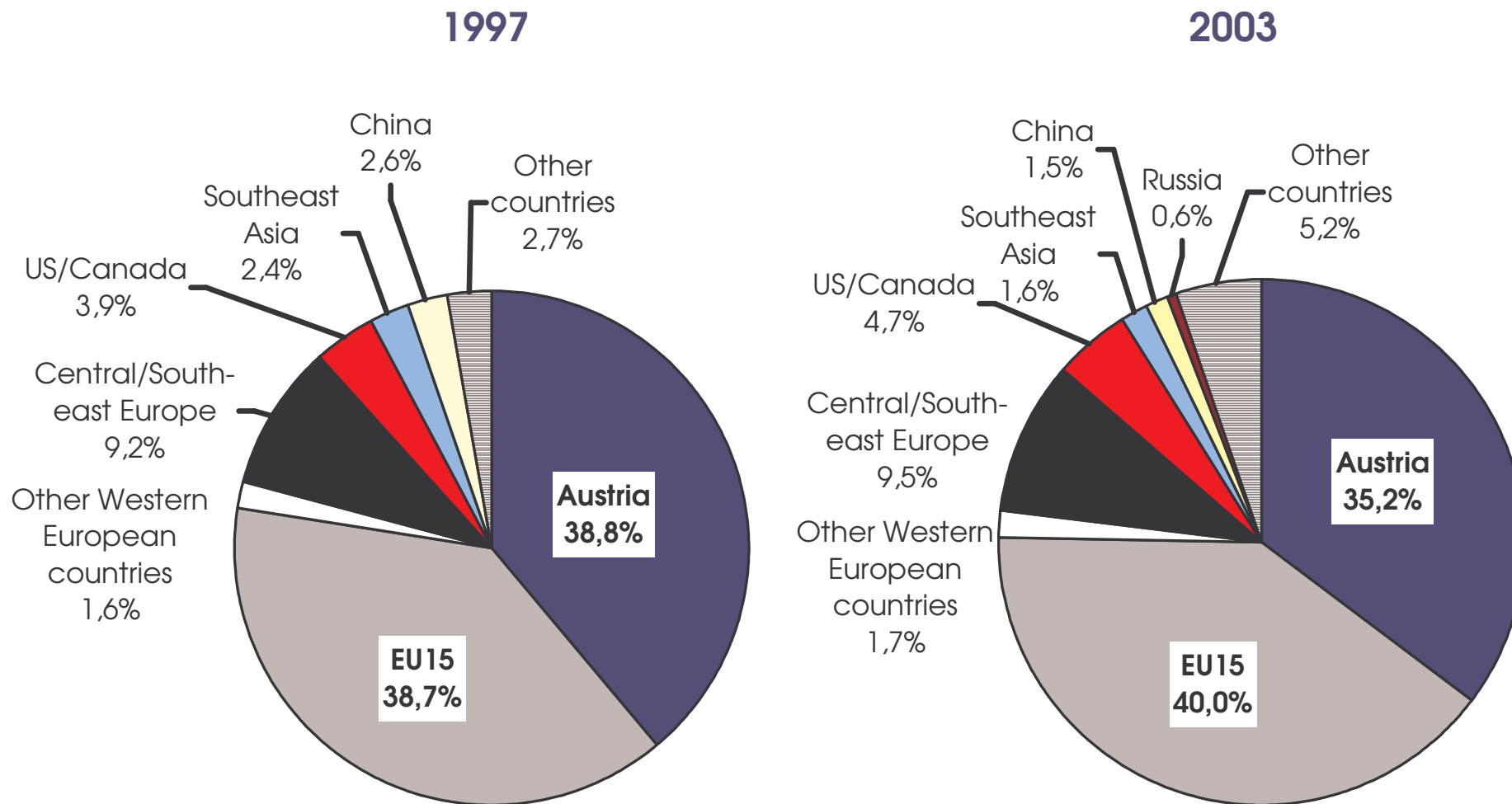
- Integrated technologies – especially clean energy technologies – gain importance
- Austria's early specialisation in environmental technologies corresponds to a good competitive position
- High quality technologies are needed to secure competitive position
- Enhancement of innovation activity through technology policy

- Change in environmental policy themes
- Growing internationalisation
- Growing competition



- New markets
- High quality
- Public support of exports

Markets for environmental technologies, 1997 and 2003



Source: WIFO surveys 2000, 2005.