

Market opportunities:

The ICT sector in Austria is sizeable with approximately 15,000 companies and 170,000 employees and revenues of EUR 45 billion (Canada: 30,300 companies, 592,600 employees, 140 billion in revenues)

As a general note, Canadian companies in the ICT sector are interested in opportunities, not necessarily specific countries. Therefore, if a Canadian company is already active on any European market, it should consider the Austrian market - especially in the wireless sub-sector.

I have taken the time to highlight a few of the key figures and rankings - and also added Canada to the picture for possible comparison.

What is clear from the figures is that Austria is indeed (information) technologically advanced, in many areas comparable to Canada and therefore many opportunities for collaboration. Switzerland leads the way in many categories so it should add a very interesting twist to the mission.

Wireless:

Austria has one of the highest mobile penetration levels in Europe (123% compared to 111% EU average). Despite having one of Europe's smaller populations with only 8.3 million people, four mobile network providers (MNOs) (Vodafone A1, Orange, T Mobile, Hutchinson) are active in the market, which ensures high levels of innovation in the fight for market share.

Austria can be a good test market: the customers are open to innovation, the market entry costs are relatively low and it can be a good starting point for a roll out. All MNOs active in Austria are member of large MNEs.

When I spoke to Canadian exhibitors at the World Mobile Congress in Barcelona, the interest in Austria was high. Austria is a very successful market e.g. for Canadian companies RIM and Redknee. NORTEL has also been active on the Austrian market and present with an office for many years.

The wireless sub-sector is also a promising one in *Switzerland*, the main market drivers being *broadband technology* and *mobile services*.

Software:

E-health presents an area of opportunities. Austria hosts the European Radiology Congress, the leading meeting for medical imaging in Europe, with more than 17,000 participants from 94 countries and more than 270 exhibitors on 26,000 m² exhibition space. A number of Canadian companies have participated (and exhibited) in the past - Vienna post would like to increase the number and bring additional companies to this promising market and introduce them to European opportunities.

Switzerland identifies opportunities in *e-health* and *enterprise software* as well as *RFID* (also a success story (Canadian company IPICO out of Montreal) in Austria).

The opportunities in *Belgium* relate to *innovation/ ICT related research* (e.g. IMEC - world leading research in nanoelectronics and nanotechnology) as well as *mobile data communication, entertainment and edutainment*.

Innovation:

The Information and Communications Technology Sector as a cross section of technologies offers an enormous potential for innovation, research and development with its broad network of universities, colleges and research institutions all collaborating closely with the private industry. In 2008 Austria's R&D expenditures amounted to over €6.8 billion, which is equivalent to 2.63% of the GDP which is 2.14% above the EU average of the R&D quota. Austria's Research environment is well established with 8400 employees in over 70 university departments and over 30 external university research labs like the Vienna University of Technology, Graz University of Technology, Technikum Wien, FH Hagenberg, FH St.Pölten just to name a few of them.

Austria in ICT rankings:

- 1) World Economic Forum - Networked Readiness Index (2008/2009): 16 (out of 134), Canada:10, Switzerland: 5, Belgium: 24
- 2) World Economic Forum - Growth Competitiveness Technology Index (2007/2008): 15 (out of 131)
- 3) Economist Intelligence Unit - e-Readiness Index (2008): 10 (out of 70), Canada: 12, Switzerland: 9, Belgium: 20
- 4) IMD - Technological Infrastructure Ranking (2007): 19 (out of 55)
- 5) Capgemini - e-Government availability (2007): 1 (out of 28)

Key indicators:

Internet users (2007): Austria: 51.2%, Canada: 76.8%, Switzerland: 61.6%, Belgium: 49.9%,
Internet bandwidth (mB/s) per 10,000 population (2005): Austria: 66.8, Canada: 67.1,
Switzerland: 95.8, Belgium: 111.8

Mobile telephone subscribers per 100 population: Austria: 116.8, Canada: 61.7, Switzerland: 108.2, Belgium: 97.8,

Detailed Rankings (out of 134):

Availability of latest technologies: Austria: 12, Canada: 9, Switzerland: 7, Belgium: 18
State of cluster development: Austria: 17, Canada: 16, Switzerland: 9, Belgium: 27
Utility patents: Austria: 17, Canada: 10, Switzerland: 6, Belgium: 21
High-tech exports: Austria: 28, Canada: 29, Switzerland: 19, Belgium: 31
Accessibility of digital content: Austria: 9, Canada: 12, Switzerland: 3, Belgium: 18
Telephone lines: Austria: 30, Canada: 8, Switzerland: 1, Belgium: 23
Availability of scientists and engineers: Austria: 21, Canada: 7, Switzerland: 16, Belgium: 20
Quality of scientific research institutions: Austria: 18, Canada: 4, Switzerland: 2, Belgium: 5
Lowest cost of broadband: Austria: 26, Canada: 16, Belgium: 16, Switzerland: 13
Cost of mobile telephone call: Austria: 7, Canada: 26, Switzerland: 18, Belgium: 35
Government prioritization of ICT: Austria: 28, Canada: 37, Switzerland: 27, Belgium: 58
Government procurement of advanced technology products: Austria: 40, Canada: 29, Switzerland: 26, Belgium: 41
Importance of ICT to government vision of the future: Austria: 29, Canada: 35, Switzerland: 24, Belgium: 59
E-Government Readiness Index: Austria: 16, Canada: 7, Switzerland: 12, Belgium: 24
Mobile telephone subscribers: Austria: 17, Canada: 84, Switzerland: 33, Belgium: 41
Personal computers: Austria: 17, Canada: 1, Switzerland: 3, Belgium: 25
Broadband Internet subscribers: Austria: 25, Canada: 9, Switzerland: 5, Belgium: 11
Internet users: Austria: 29, Canada: 4, Switzerland: 17, Belgium: 30
Internet bandwidth: Austria: 15, Canada: 14, Switzerland: 9, Belgium: 8