

April, 2026

Willkommen Österreich

The Semicon Industry in Austria



Peter-Jan Hendrikx

Why this Austria session



Share innovation. Shape tomorrow.

We want to explain you what is happening in Austria in the area of Semicon and HighTech and why we as Semicon-HighTech-NL industry should collaborate with Austria.



Strong position in automotive and power electronics (perfect match with the Netherlands)
Austria is a European hotspot for power semiconductors and automotive applications.

This aligns directly with Dutch strengths in:

- equipment
- automotive chips
- energy transition

Strong R&D ecosystem with a direct industrial link. Austria combines research and industry very effectively:

- short lines between research and production
- focus on sensors, packaging, and system integration

Complementary ecosystem (no direct competitor to the Netherlands)

- niche-driven
- specialized (power electronics, sensors)
- less competition - more room for collaboration
- Austria is a low competition – high collaboration” market



Agenda



Share innovation. Shape tomorrow.

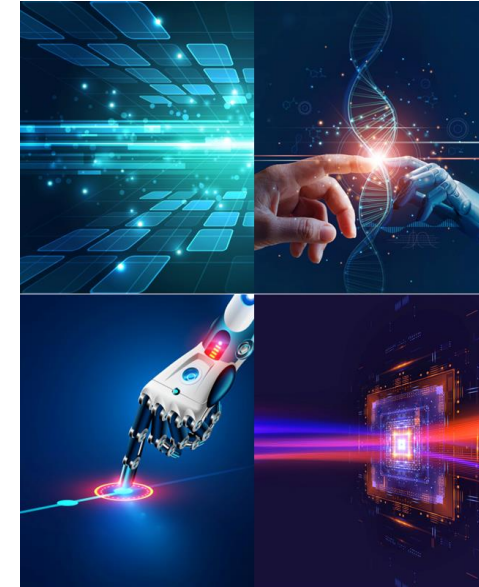
- 14:00 – 14:05 - Opening by Peter-Jan Hendrixx / High Tech NL and Chip NL CC
- 14:10 – 14:20 – Christian Schierer - handelskamer-Austria in The Netherlands
- 14:20 – 14:50 - Gerlinde Gahleitner – ABA – Explaining the Austria market
- 14.50 – 15:00 - Michael – Leopold / Gernot Eder – from Silicon Alps – Ebscon
- 15.00 - 15.15 – Michael – Leopold / Gernot Eder – from Silicon Alps – Company visits
- 15.00 – 15.15 - Q&A session

We are High Tech NL



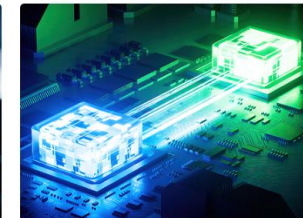
Share innovation. Shape tomorrow.

- High Tech NL is a Dutch industry association
- Founded in 2013 as an independent community, with nationwide activities and members
- 310+ member companies, covering many areas and segments
- Thought leadership, focus & support for 'common interest groups'
 - **Cluster Semiconductors** (210+ companies and institutes & covering all steps in the process)
 - Other clusters: **Robotics - Lifescience Technologies - Energy Systems**
- Support cooperation, partnerships and international focus
- Exhibitions, Incoming and outgoing missions, seminars, webinars, hosted by sessions. Connect industry with the government and institutes.



Semicon Manufacturing Equipment

Technology for chip production such as lithography, etching and metrology, with Dutch leaders like ASML and ASM



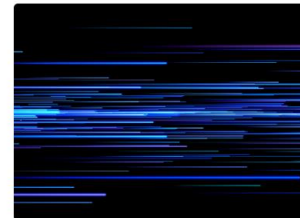
Chip Design

The design of integrated circuits for applications in fields such as automotive and medical technology



Heterogeneous Integration

The combination of different semiconductor components into powerful, compact systems for AI, 5G and medical devices



Photonics and Quantum Technology

Chips that use light for data processing, with applications in ultra-fast communication and advanced sensor technologies

Semiconductors Ecosystem

Share innovation. Shape tomorrow.

Knowledge, R&D, Others



Chip Production



Services & Modules

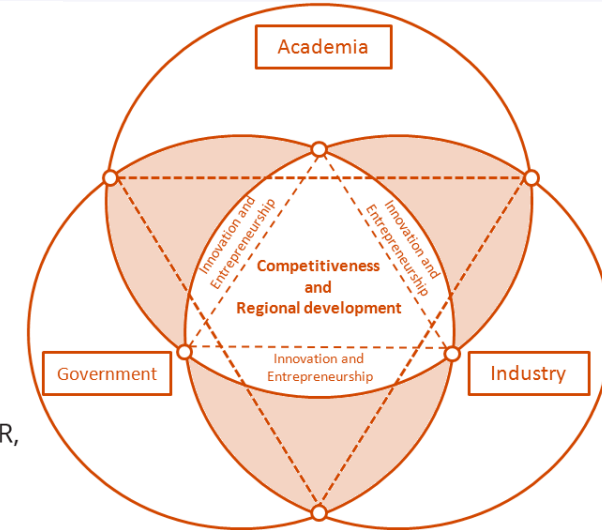
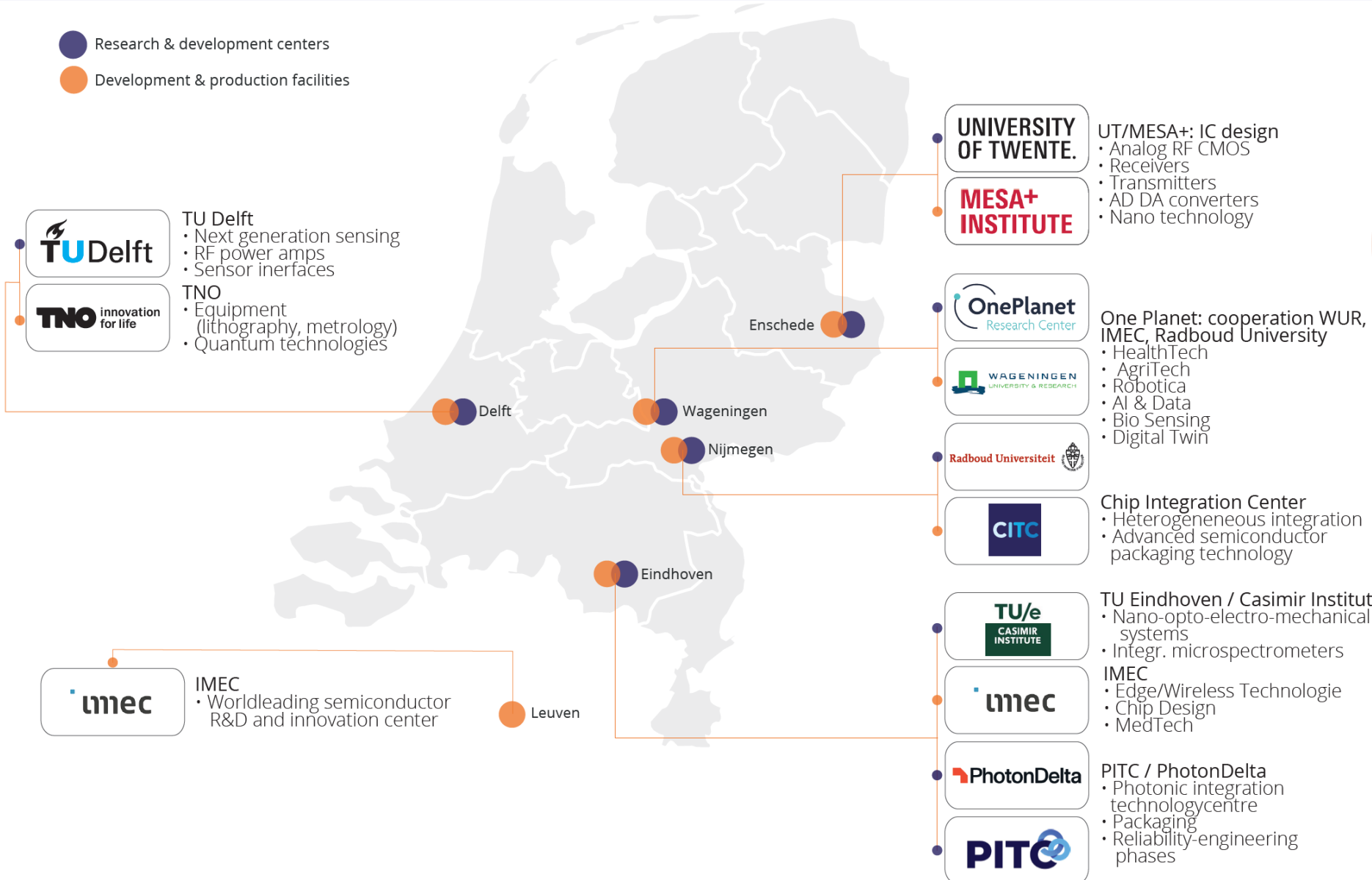


International knowledge institutes



Share innovation. Shape tomorrow.

- Research & development centers
- Development & production facilities



Top Technical Universities

TU/e Eindhoven University of Technology

UNIVERSITY OF TWENTE

TU Delft

Universities of applied sciences.

HAN UNIVERSITY OF APPLIED SCIENCES

SAXION UNIVERSITY OF APPLIED SCIENCES

Fontys University of Applied Sciences

www.cccnl.nl

ChipNL Competence Centre.

Building on a holistic semiconductor value chain

In and out going Missions in 2025



Share innovation. Shape tomorrow.

Incoming missions

- Austria



Outgoing missions

- Austria - Ebscon



Mr. Christian Schierer

Commercial Counsellor-Austria





AUSTRIA BUILDING BRIDGES

Webinar on
Austria's Semiconductor Ecosystem and Opportunities
around EBSCON 2026

An overview on #AUTNDL and #TechFacts

Christian H. SCHIERER
Commercial Counsellor at the Austrian Embassy
Head ADVANTAGE AUSTRIA The Hague

April 8th, 2026 | The Hague Webinar

#Hashtags

Timeline of today

#Intro

About us - ADVANTAGE AUSTRIA | What we do !

1

2

#Facts&Figures

Key facts | 3 reasons among 1000
#AUTNDL bilateral trade |

#TopTrends

Innovation Cooperation | Hidden Champions

3

4

#R&D

Snapshot | Expenditures & Funding | Trends |
EU & global perspective | Skills & STEM | Tech
Facts

#Q&A

Conclusion

5

#AboutUs

Facts and figures – since 1946

GLOBAL BUSINESS SUPPORT

594,000

companies registered in Austria,
thereof

64,000

exporting companies of which
18,000 are our clients per year

100
offices



75+
years of
experience

80
nationalities

700
employees

70
countries



#AUTNDL

ADVANTAGE AUSTRIA The Hague - What we do....



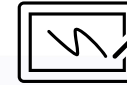
Focus on
The Netherlands



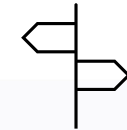
Individual service to
900+ companies
annually



2,300+ contacts
with companies
from Austria



25+ events per year
in the Netherlands
or in Austria



Location: Lange
Voorhout 86/11,
2514 EJ
The Hague

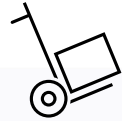
Key Facts 2026



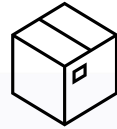
Austria		Netherlands
83,882	Area (km ²)	37,391
9.2	Inhabitants (Mio.)	18.0
490.2	GDP (bn. EUR)	1,329.7
196.7	Goods Imports (bn. Euro)	712.8
191.2	Goods Exports (bn. Euro)	841.9
2.9 (2024) 3.5 (2025)	Inflation (%)	3.2 (2024) 2.9 (2025)
7.0 (2024) 7.4 (2025)	Unemployment rate (%)	3.7 (2024) 3.9 (2025)
-4.5	Budget balance (% of GDP)	-2.2
81.5	Public Debt (%)	45.5

#Facts

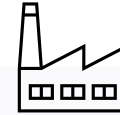
3 reasons among 1000, why the Netherlands are important to us....



Austrian exported goods worth EUR 3.8 bn in 2025 (+7.0%), services in Q2 2025 worth EUR 2.9 (+2.1%)



Imported goods from the Netherlands to Austria amounted to EUR 5.7 bn (2025)



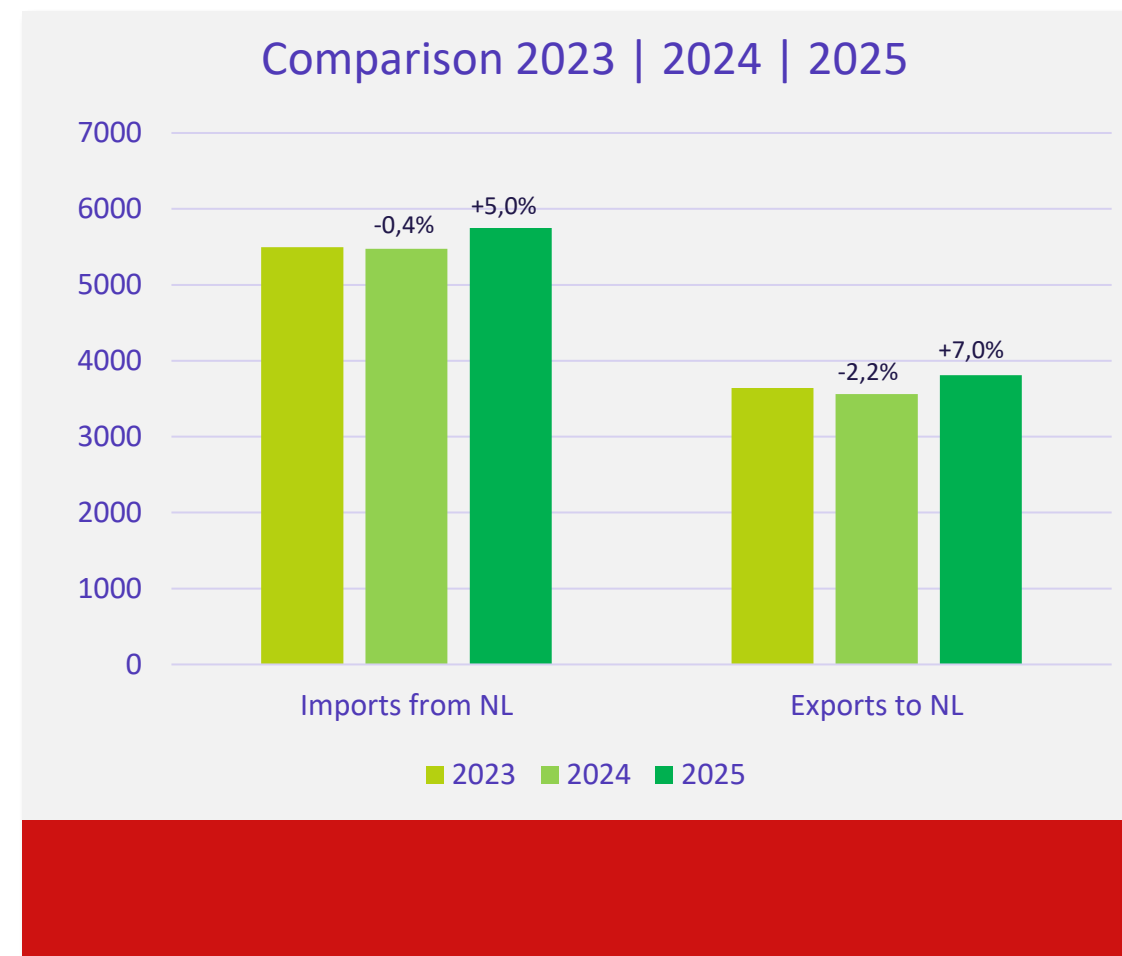
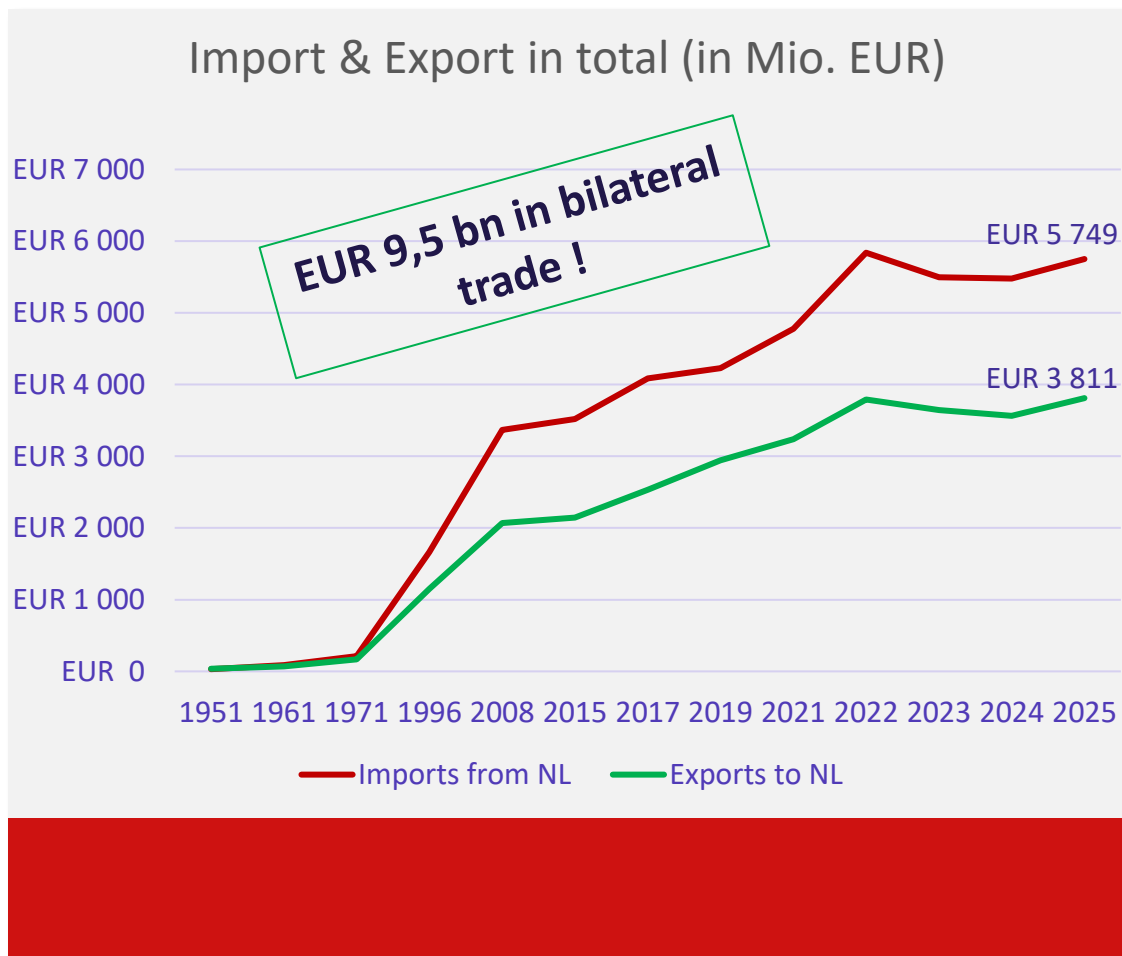
2,000+ Austrian exporters
260+ rep. offices plus
85 spin-offs

■ The Netherlands are...

- ...the 3rd most important investment market for Austrian companies within the EU
- ...the 4th most important investor in Austria within the EU
- ...the 8th most important trading partner for Austria in the EU, 10th worldwide: EUR 15,7 bn. (goods & services)
- ...the 13th most important export market worldwide: EUR 3,8 bn (+7%, goods), EUR 2,9 bn (1-6/25, +2,1%, services)
- ...the 5th most important source market within the EU: EUR 5,7 bn (+5%)
- ...the 2nd most important export market for Austrian services (tourism, logistics, IT Telecom, Data & Network services)

#BilateralTrade

Development of trade relations (goods only) | 1951-2026

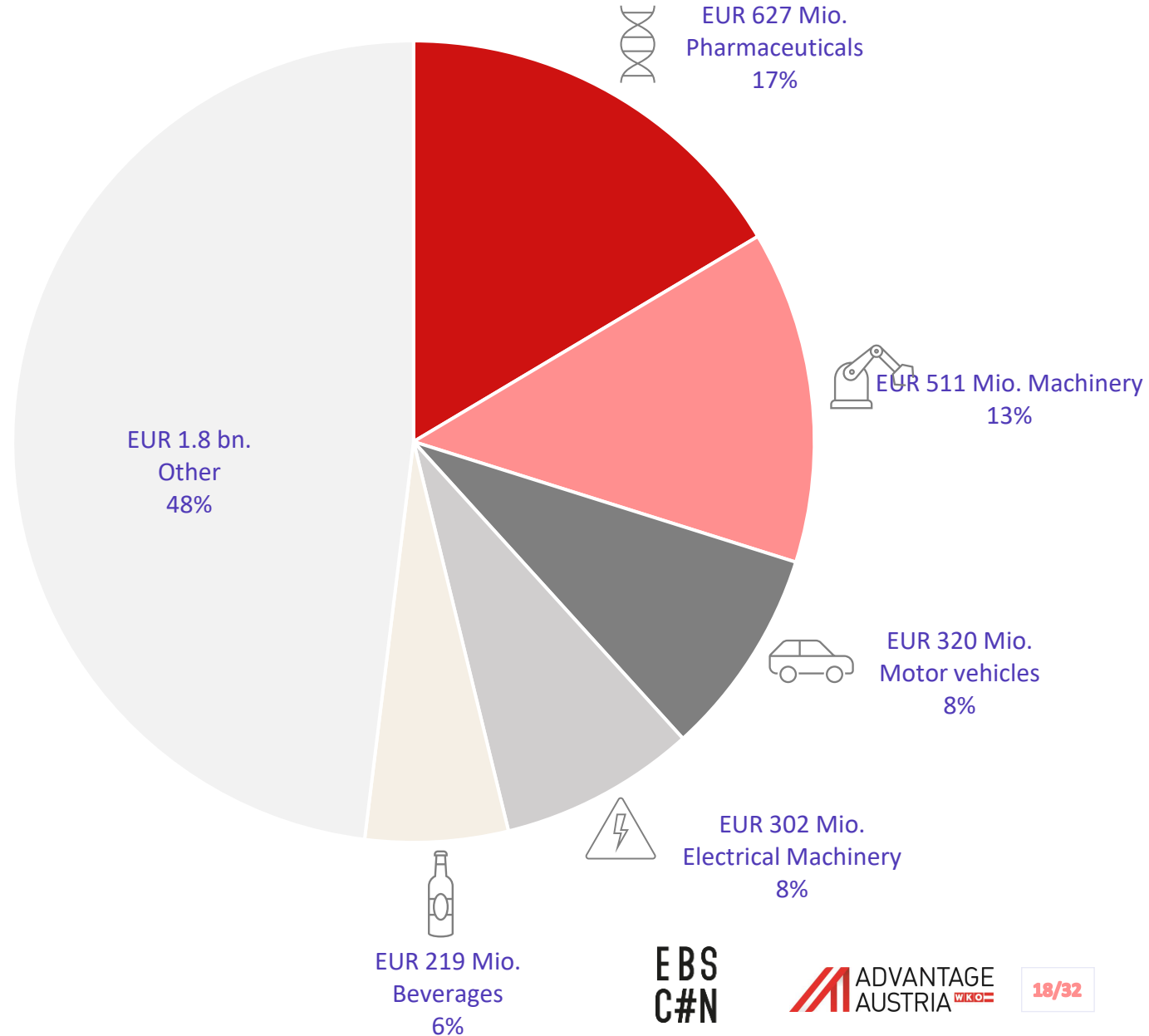


Source: Statistik WKO; March 2026

#AUTNDL

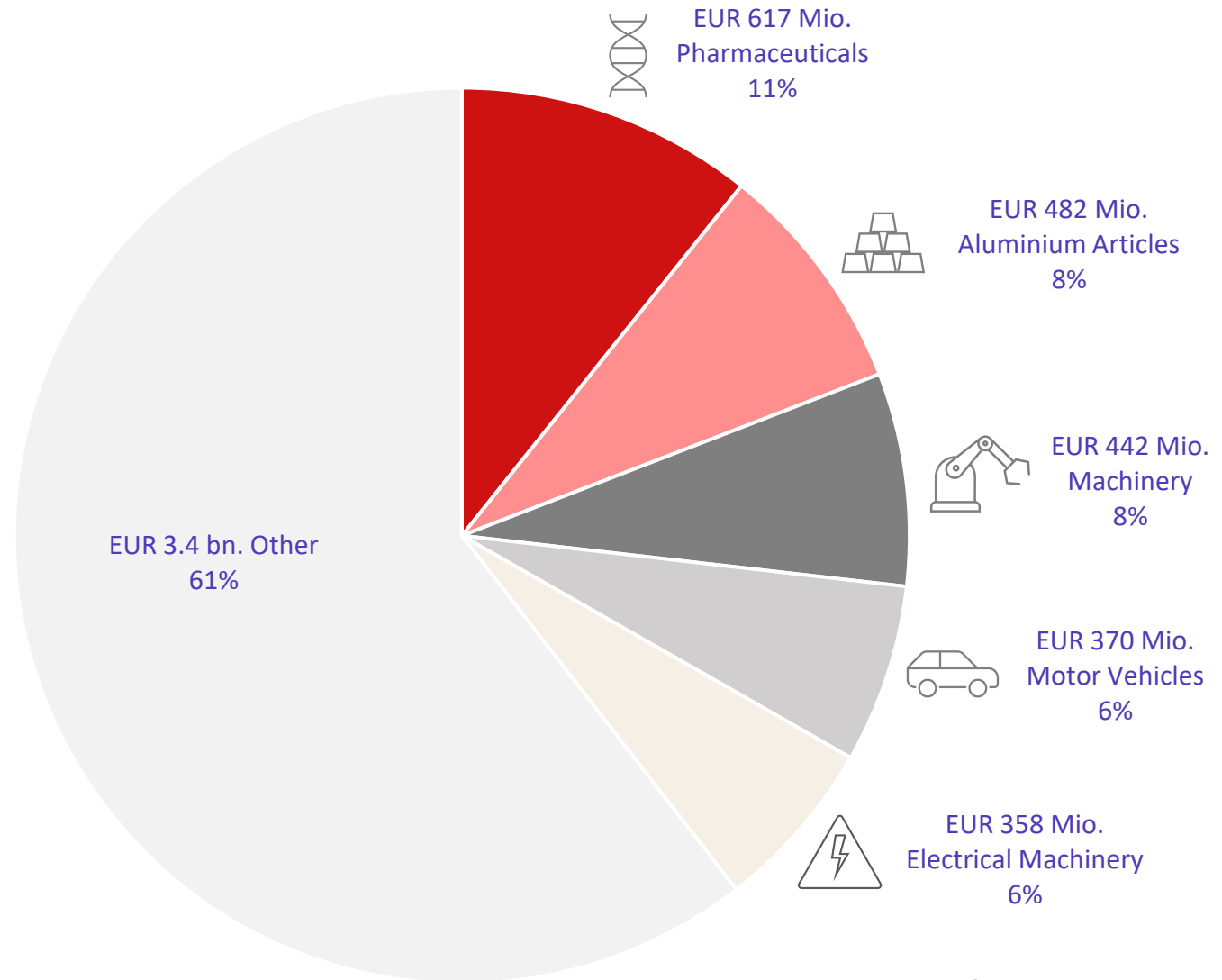
Top 5 export goods 2025

- Total Exports: EUR 3.8 bn.
- Top-5: EUR 1.9 bn.



#NDLAUT Top 5 import goods

- **Total Imports:** EUR 5.7 bn.
- **Top-5:** EUR 2.2 bn.



Top trends

AUTNDL cooperation in #Innovation



Urban technologies



Medical technology



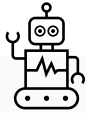
Wind energy



Data centre



Drones



Robotics



Virtual reality
Augmented reality



Software and ICT
CyberSecurity



3D-Printing

#AUSTRIA

Be aware: A. is THE country of HIDDEN CHAMPIONS



Over 200 companies
around the globe are at the top of specialist sectors.

Hidden Champions benefit from
focused programmes
and **global marketing.**

Export share of
Hidden Champions:

85%

Born Globals see the whole world as
their market and are **mostly tech startups.**

Hidden champions are mostly medium-sized family businesses with
great innovation and
long-term business goals.



2024 R&D snapshot

€16.13bn

R&D expenditure

2024

3.35%

Research intensity

share of GDP

€481.94bn

GDP

2024

+5.5%

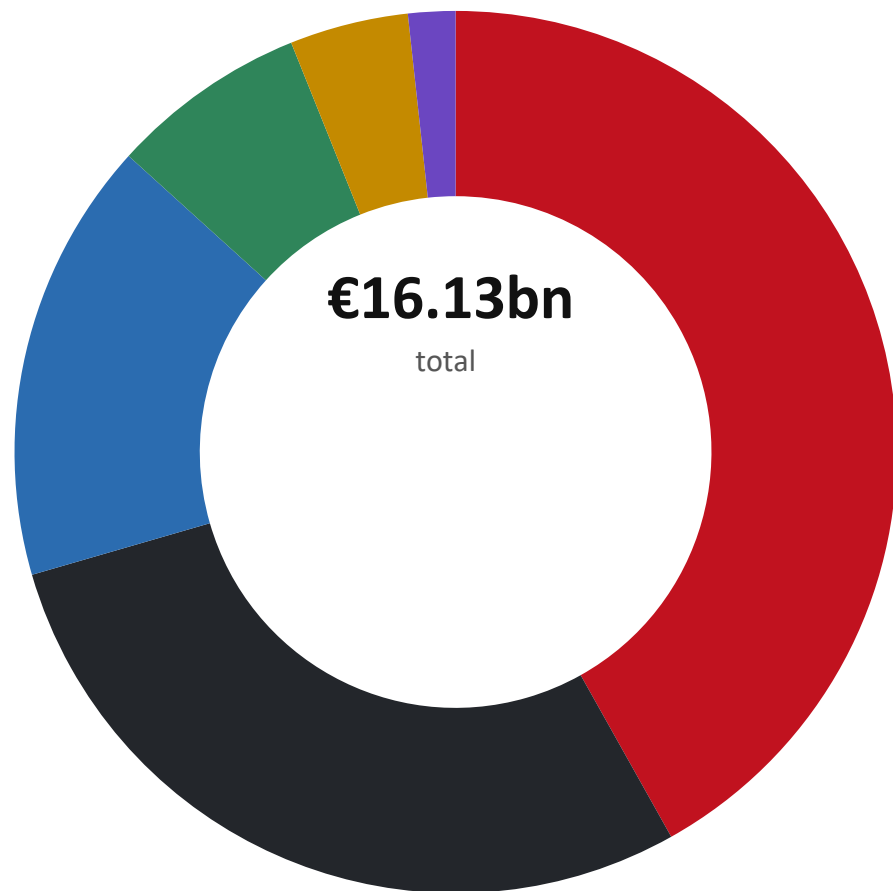
Change in R&D expenditure

vs 2023

Additional figures stated in the report

- 11th consecutive year above the EU target of 3% of GDP for R&D expenditure
- Public sector share of R&D expenditure: 34.7%
- Federal government contribution: around €4.5bn
- Research premium: €1.163bn

How 2025 R&D expenditure is funded

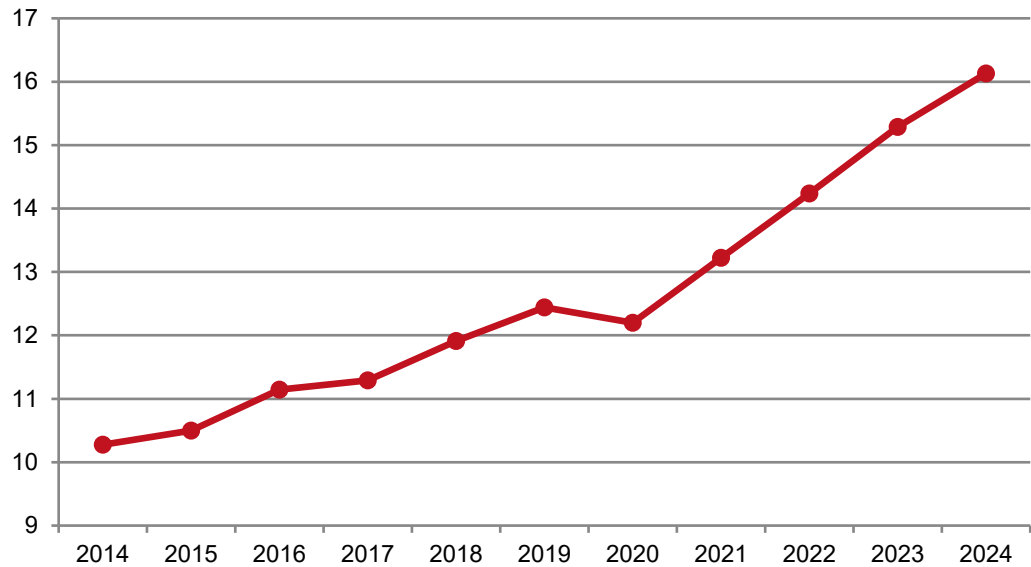


Source	Share	€ bn
Business enterprise sector	41.87%	6.754
Federal government	28.64%	4.620
Abroad	16.20%	2.613
Research premium	7.21%	1.163
Regional governments	4.35%	0.703
Other	1.73%	0.279

2014-2024 trend

R&D expenditure and research intensity

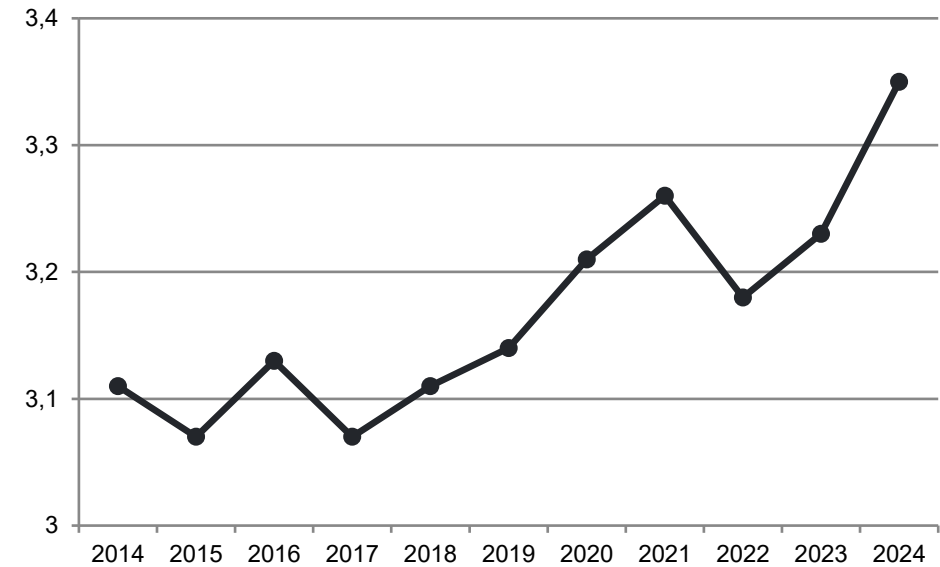
R&D expenditure (€ bn)



2014: €10.28bn

2024: €16.13bn

Research intensity (%)



2014: 3.11%

2024: 3.35%

2020: 3.21% 2021: 3.26% 2022: 3.18% 2023: 3.23%

Austria in EU and global benchmarks

3rd

EU rank for R&D expenditure

2023

2.13%

R&D staff in labour force

2023 / 5th in EU

6th

EU rank in EIS

2024 / 116.3% of EU average

17th

Global rank in GII

2024 / 8th in EU

7th

EU rank for patent intensity

2022

14th

EU rank for venture capital

2023 / 0.110% of GDP*

* three-year average 2021-2023

Skills, STEM and funding pipeline

STEM pipeline

31.1%

share of graduates in STEM subjects in 2022
2nd place in the EU-27

First-time STEM graduates

2019/20	2025/26 target	2030 target
5,544	6,065	6,500

2030 target for female participation: 43%

University and UAS funding figures

Performance agreements 2025-2027



Life sciences incl. medicine: €5.3bn (36.4%)

STEM subjects: €4.4bn (30.2%)

Together: two thirds of the budget

Universities of applied sciences

+2,969 additional federally funded places since 2018/19

2,520 of these in STEM, digitalisation and sustainability

2025/26 expansion: 800 more places, including 351 in STEM, digitalisation and sustainability

Selected technology-related facts in the 2025 report

Key enabling technologies and related indicator positions

Key enabling technologies named in the report

- Advanced manufacturing technologies and materials
- Semiconductors
- Life sciences
- Environmental technologies
- Quantum physics and photonics

Selected rankings and positions

- 2nd in EU** scientific publications in quantum research
- 3rd in EU** patent applications in quantum technologies
- 10th in EU** AI scientific publications
- 12th in EU** Readiness for Frontier Technologies Index
- 3rd in EU** Economic Complexity Index 2022
- 8th worldwide** Economic Complexity Index 2022
- 3rd in EU** joint publications of public and private partners

AUSTRIA BUILDING BRIDGES

Thank you for your attention!

Please, do not hesitate to contact us!
We look forward to hearing from you!



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Head of ADVANTAGE AUSTRIA The Hague
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Frau Gerlinde Gahleitner – ABA



Business Location Austria Microelectronics

Austrian Business Agency

High Tech NL

April 8, 2026 Gerlinde Gahleitner



Austria at a glance

A white silhouette map of Austria is centered on a dark blue background. The map is irregularly shaped, following the country's borders. Overlaid on the right side of the map is a list of key statistics for Austria, with each metric name in red and its value in dark blue.

Area	83,883 km ²
Inhabitants	9.2 million
GDP/capita	€46,889
Export	56.9%
Productivity	10.7% above EU-average
R&D quota	3.35%



Austrian purchasing power clearly exceeds EU numbers

Purchasing Power
in %



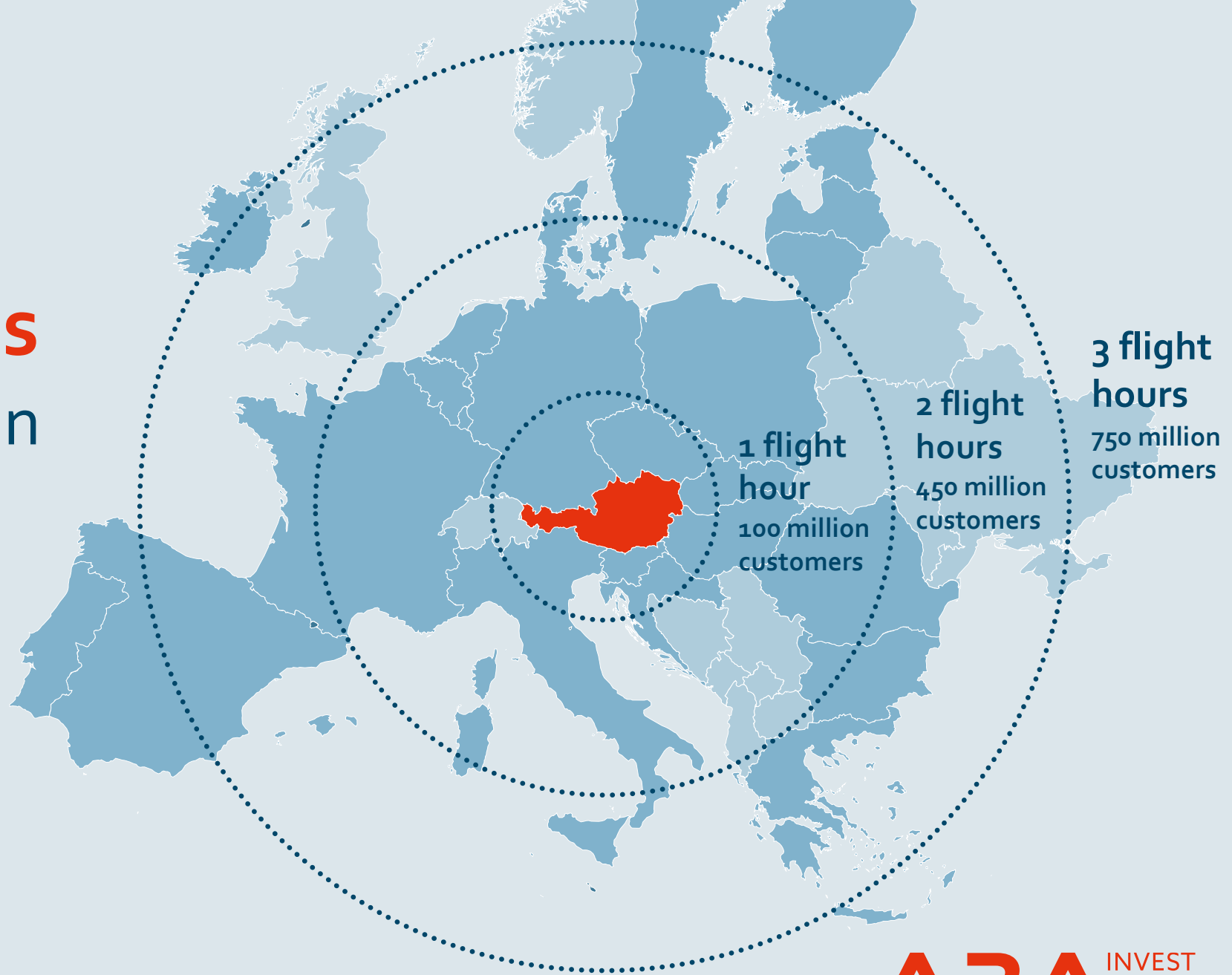
EU



Austria



Ideal access
to all European
markets





Your ideal access to EU and German speaking markets

100 million
German speaking
consumers





Austria is globally connected

Austria offers a highly connected transport network providing access to the rest of Europe and beyond



Digital

Excellent digital connectivity:

99.55% 5G coverage

Average broadband speed:

57.17 Mbps.



Air

6 Airports: main ones are Vienna International, Innsbruck and Salzburg.



Road

128,267 km of excellent quality modern roads

1,749 km motorways

501 km dual carriageways



Rail

Excellent railway network

~ 94.4 million tons of goods were transported in 2024

Austria: the Green Champion

27%
of all agricultural
land is
organic

#1
in material
recycling
in Europe

48%
of land =
forests

+88%
green electricity

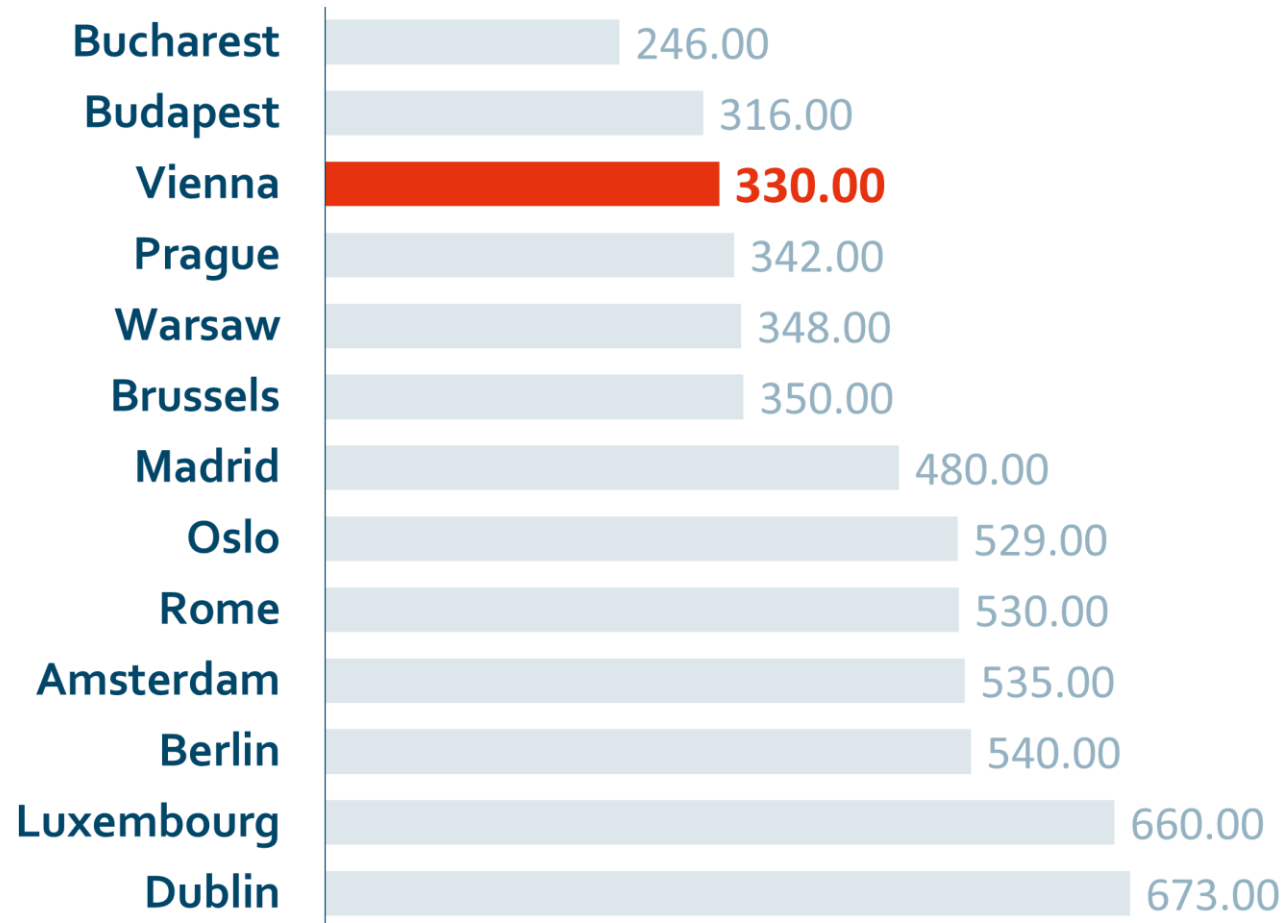
**High air
quality**

95%
of lakes have
excellent water
quality



Costs of running business are highly competitive

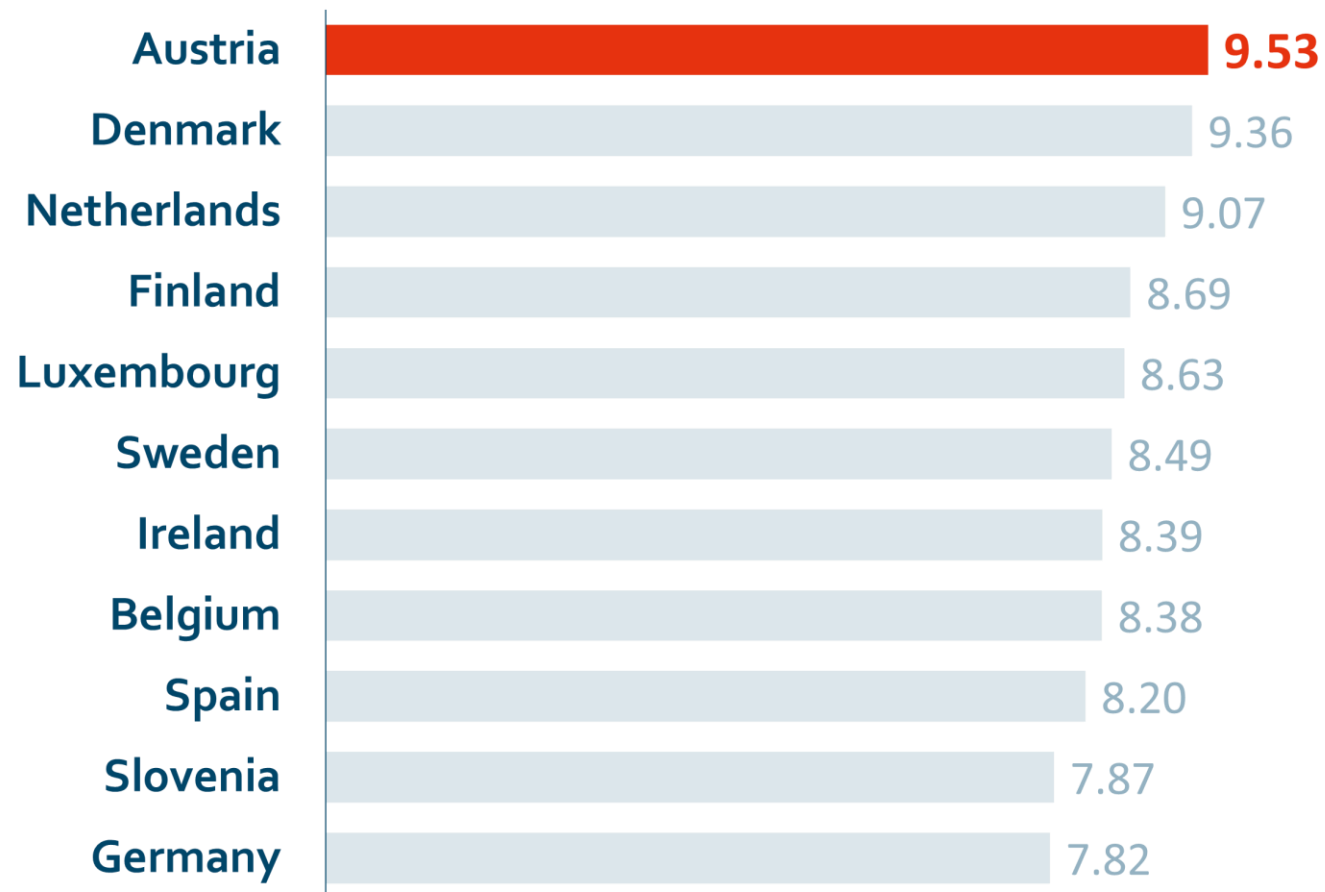
Office rents in EUR per square meter and year in EUR



**Austria has an
excellent
cost/quality ratio!**



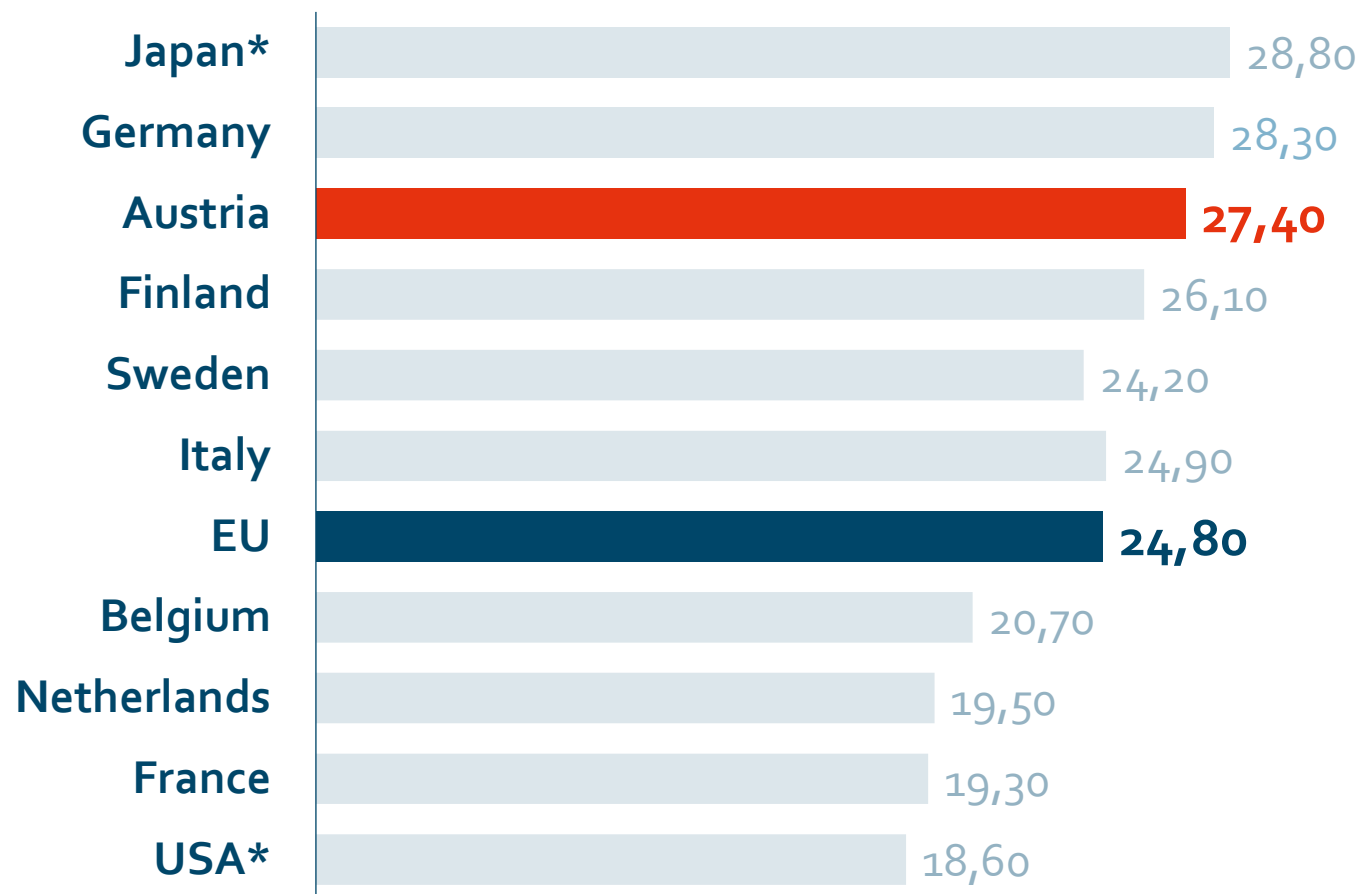
Austria is the most liveable country in the EU



And its capital, Vienna, was ranked the world's most liveable capital city for 10 consecutive years, according to the Mercer study.

> Austria is an industrial nation

Industrial production, as percentage of GDP – comparison of selected countries



Did you know that...



...more than
1 million
employees work
in the production
sector?



The top 6 industries account for >70% of total production



Mechanical engineering
22.2%



Gas and heat supply
12.2%



Electro / Electronics
12.1%



Chemistry
9.5%

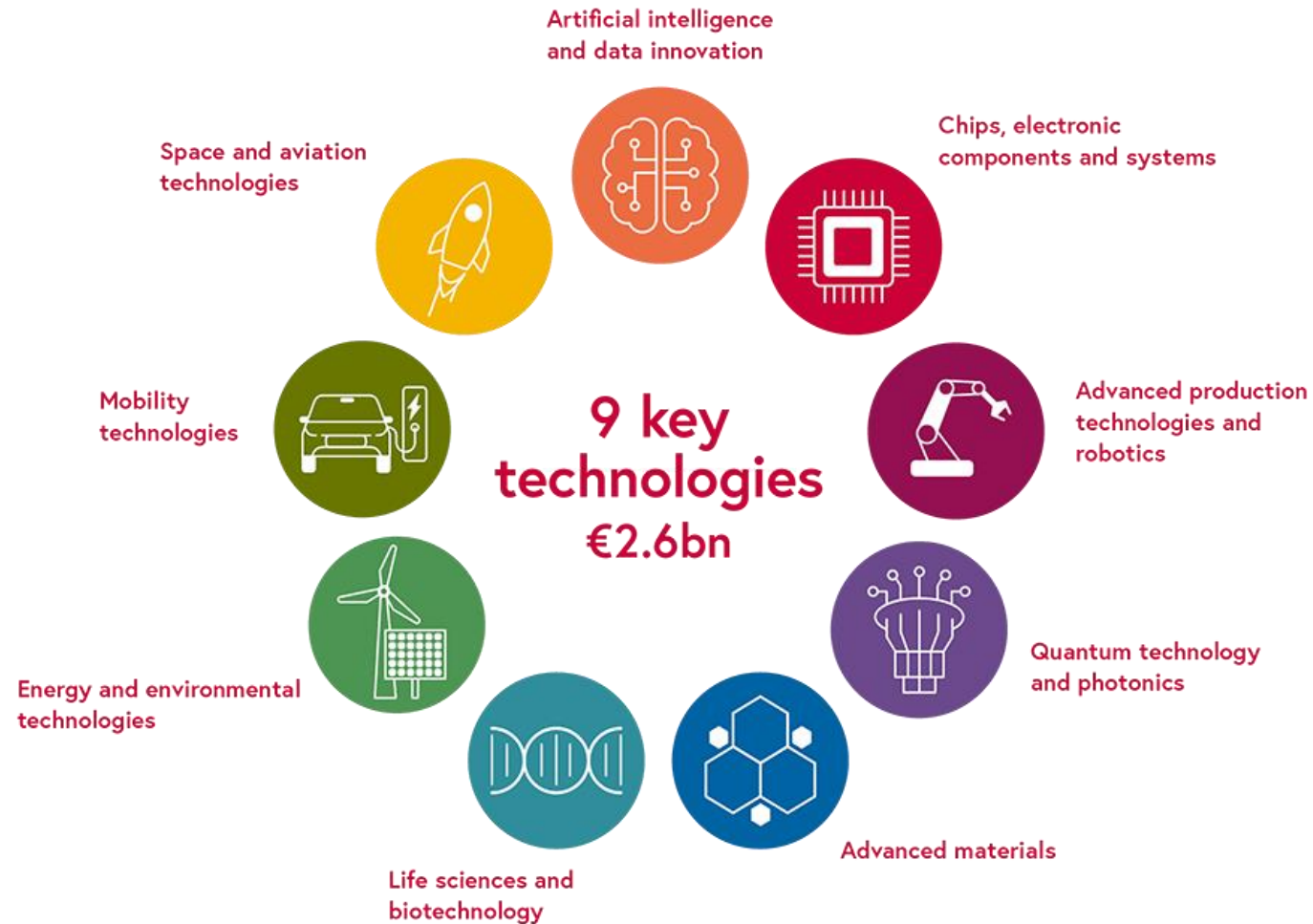


Vehicles
8.6%



Food
6.8%

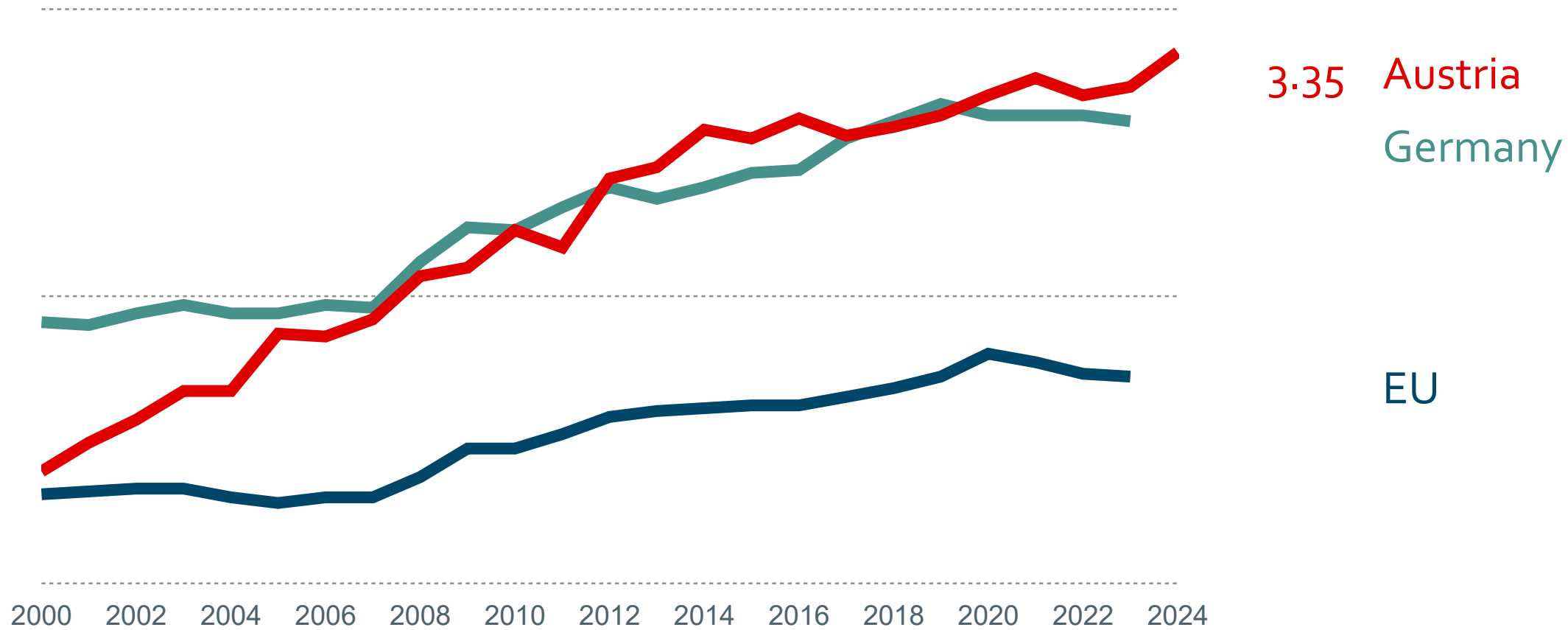
NEW: Industrial Strategy 2026





R&D Expenditures Grow Above Average

As a percentage of GDP





Microelectronics in Austria at a Glance

Ecosystem

Talent

Funding opportunities

Success stories

Microelectronics in Austria



>300
Companies



74,300
Employees



€24.6bn
production value



90%
global market share
of security chips for
passports



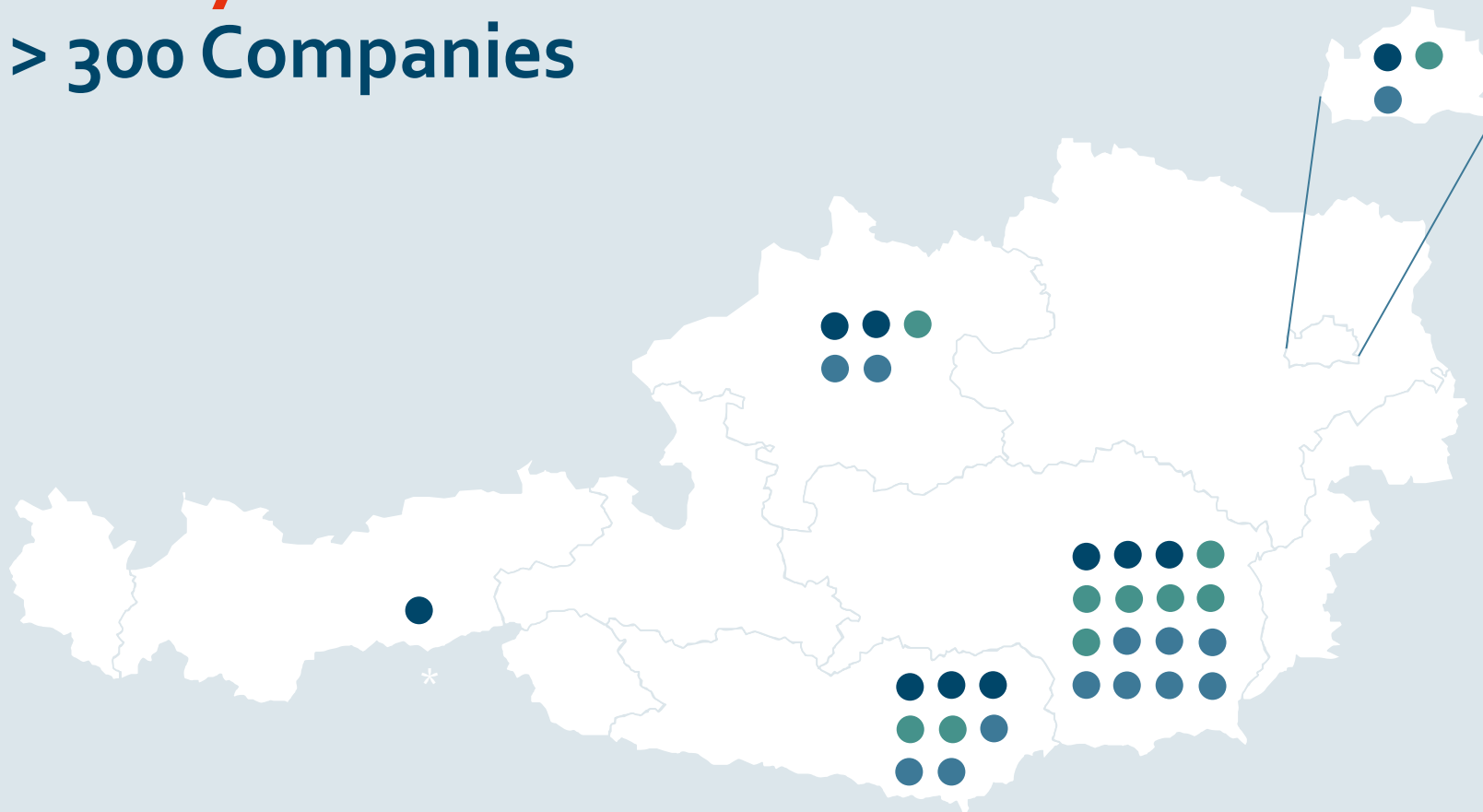
#1
share of total value
creation



#1
share of total value
creation

Ecosystem:

> 300 Companies



Semiconductors

- > Infineon
- > 2 AT&S
- > Lam Research
- > EV Group
- > ...

Smart Sensors

- > ams Osram
- > E+E
- > AVL
- > The WILD Group
- > ...

Wireless & IoT

- Apple
- Intel
- NXP Austria
- Renesas
- ...

> Domestic companies in Austria

Austria is fostering an ecosystem of innovative domestic companies at the cutting edge of semiconductor development

AT&S

Austrian AT&S is the only European manufacturer of high-end printed circuit boards and IC substrates. In Austria, the company undertakes research at its headquarters in Leoben. At its plant Fehring, the company manufactures different types of printed circuit boards. AT&S also has locations in Germany, the US and Asia.

[Website](#)

Sensorik Austria

Based in Lambach, Sensorik Austria is an internationally renowned supplier of high-performance sensors for object recognition with innovative sensor and fibre optic technology. Offering precision moisture measurement and more, Sensorik's fibre optic sensors are widely used in industrial and mechanical engineering applications to optimise performance.

[Website](#)

Sico Technology

With headquarters in Villach, Sico Technology is an Austrian manufacturer of components for the optical and semiconductor industries, with patented manufacturing processes for silicon, quartz and ceramics components. The company has recently expanded its international presence with manufacturing capabilities in United States.

[Website](#)

> Foreign-owned companies in Austria

International semiconductor companies are also taking advantage of Austria's semiconductor opportunities

Ams-OSRAM AG

With dual headquarters in Graz and Munich, Ams-OSRAM is an electronics company that designs and manufactures sensors for small form factor, low power, highest sensitivity and multi-sensor applications. It is a global leader in intelligent sensors and emitters with a workforce of around 1,300 in Austria.

[Website](#)

NXP Semiconductors

Dutch semiconductor designer and manufacturer NXP has a long-term centre in Gratkorn, Austria. The Austrian subsidiary works in the research, design, development, product management, marketing and application support of secure contactless identification systems. Recently, NXP expanded its Austrian operations by opening the NXP's Centre for Cryptography and Security in Gratkorn.

[Website](#)

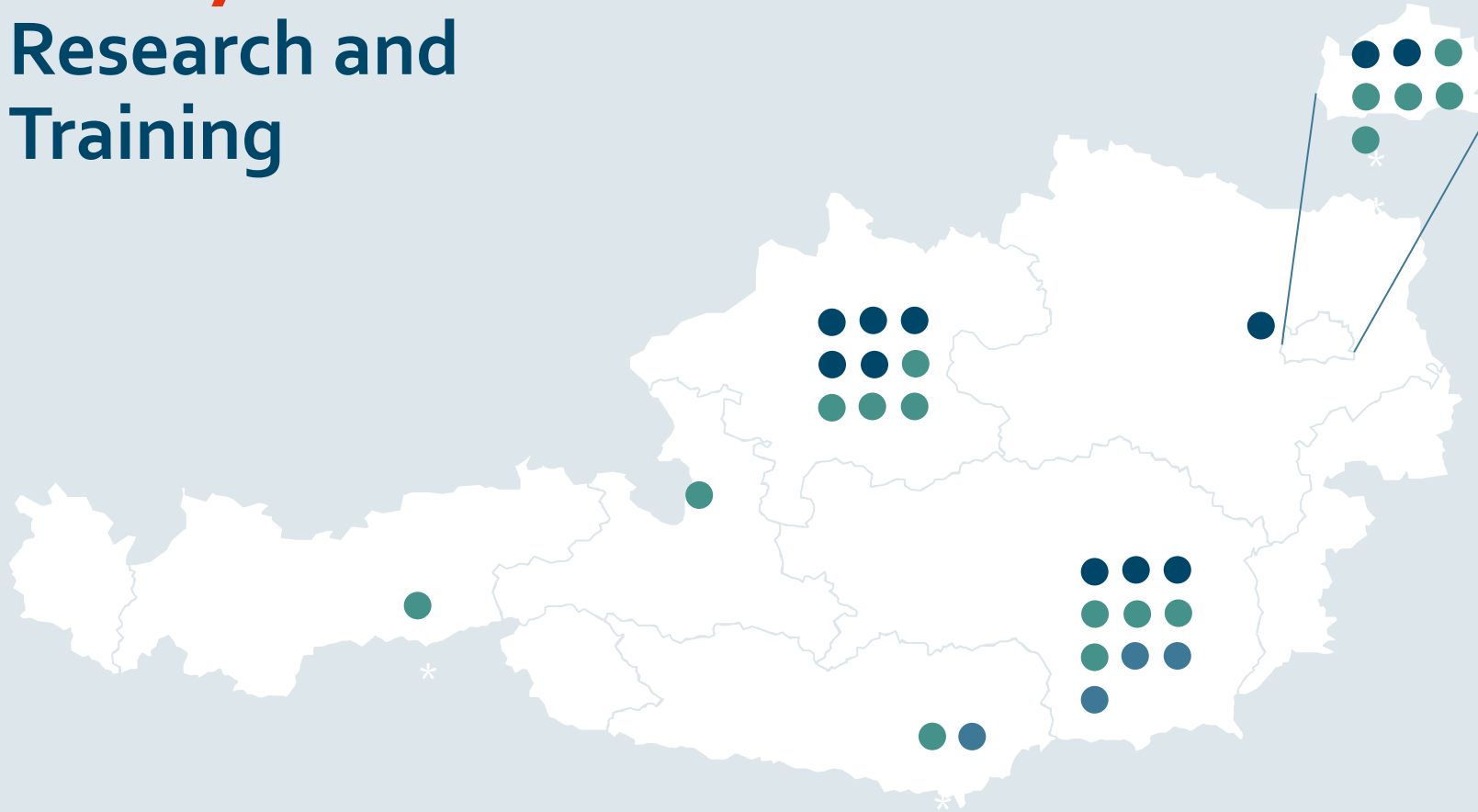
Infineon

German company Infineon is a leading provider of chips for the telecom, automotive and chip cards industries. With 5,460 employees across Austria, Infineon is one of the strongest research companies in the country. The company has R&D centres across Linz, Graz and Villach and additional offices in Vienna and Klagenfurt.

Infineon Austria employs 2,500 in Research and Development alone.

[Website](#)

Ecosystem: Research and Training



Research

- > AIT
- > Fraunhofer Austria Research
- > SAL
- > ...

Education

- > TU Graz
- > TU Wien
- > Alpen-Adria-Universität
Klagenfurt
- > ...

Networks

- AT Styria
- Electronic Based System Centre
- Silicon Alps

Microelectronics in Austria at a Glance
Ecosystem



Talent

Funding Opportunities
Success Stories





Got Talent? Yesssss!!

Labour law
modern and flexible
#1 in Redundancy costs



Productivity
14.2% above EU average



Universities
>60 universities
public / private /
of applied sciences



Training
#2 worldwide in the
practice-oriented
vocational training



Schools
vocational schools unique
to Austria (HAK, HTL)



Did you know that...

Vienna has the largest percentage of students across the DACH region?

BERLIN

3.8 Mio. Inhabitants
197,000 students

5.2% students



MUNICH

1.6 Mio. Inhabitants
140,900 students

8.8% students



VIENNA

2.0 Mio. Inhabitants
192,700 students

9.6% students

>30% intern. students





Almost 1/3 of students graduating in STEM subjects

Providing high levels of expertise and excellent English skills



>18,000

STEM students
each year



>30%

of STEM graduates

=

#2

in the EU



#1

English proficiency
in Europe

ICT in Austria at a Glance

Ecosystem

Talent



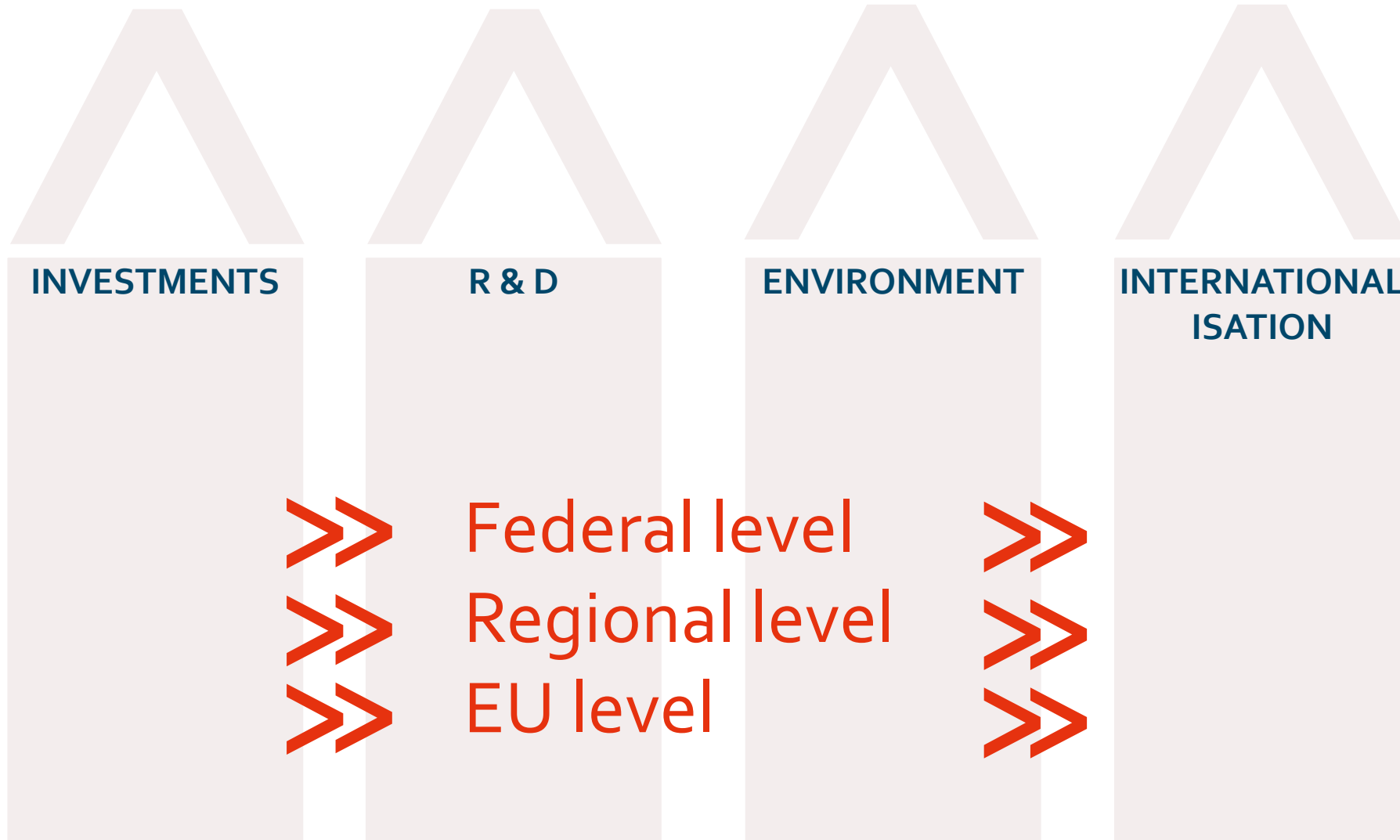
Funding Opportunities

Success Stories





Funding can be received via four main funding lines





Austria offers a variety of R&D incentives



direct

Cash grant & subsidised
low-interest rate loans

via funding agency FFG, aws
or regional agencies

2024:

EUR 1.23 bn for R&D



indirect

Tax credit of 14 %

includes costs of staff,
material, for in-house
research or outsourced to EU
research institutes

Requirements:
expert opinion by FFG,
external partners



Austria offers an investor-friendly tax system

Corporate tax rate: **23%**

Modern group taxation

Tax premium for R&D: **14%**

Additional funding opportunities

No trade tax

No net worth tax

No wealth tax

No inheritance/
gift tax

Double taxation treaties





Business units



INVEST in AUSTRIA

Founding, expanding, establishing a research location: We inform and support international companies before they come to Austria, accompany them on their way and remain at their side even after their project has been completed.



WORK in AUSTRIA

We promote Austria as a working location abroad and help companies in finding highly qualified, international specialists. We provide advise on living and working in Austria (a.o. Red-White-Red Card).

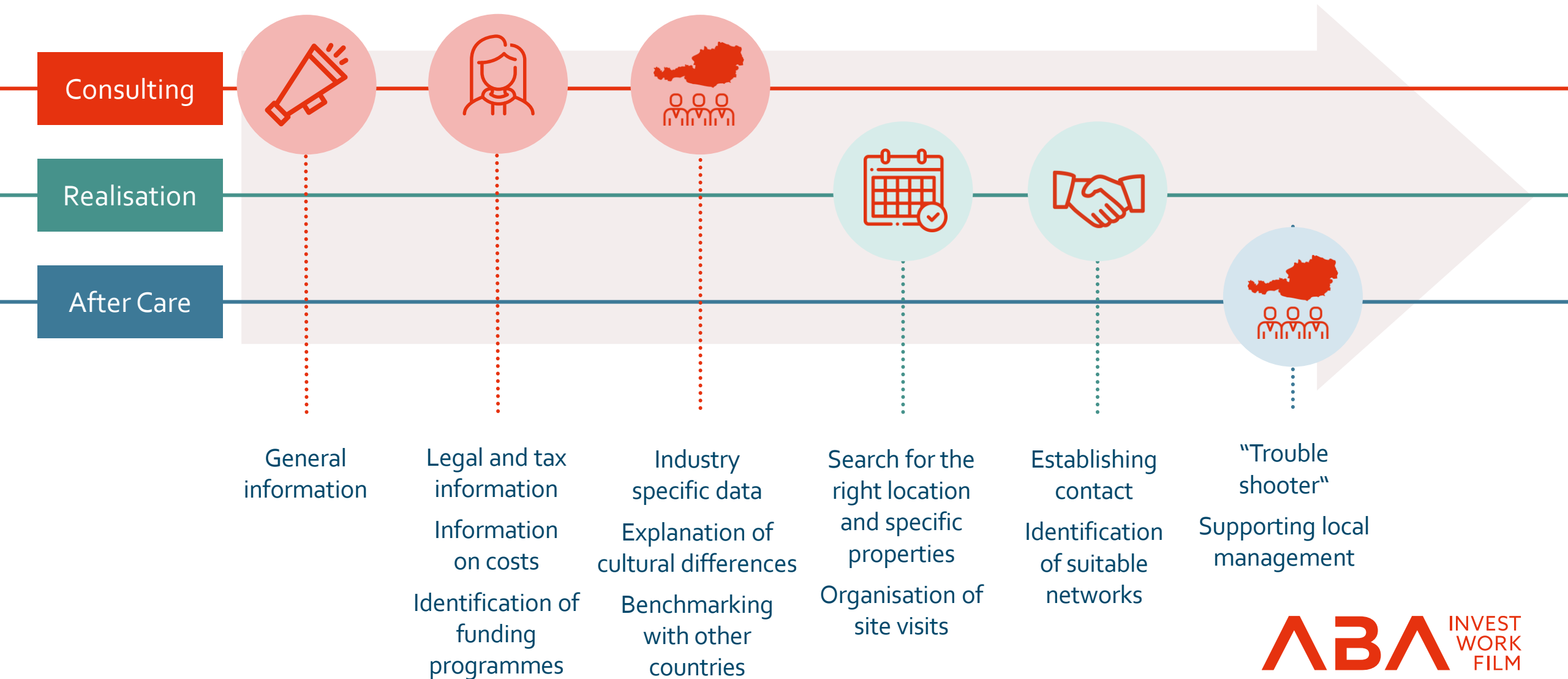


FILM in AUSTRIA

FILM in AUSTRIA is the Austrian-wide Film Commission. Tom Cruise climbs down a rope from the Vienna State Opera and James Bond flies across Tyrol. We work "behind the scene" so that the world sees these images.



INVEST in AUSTRIA supports you throughout the entire process – confidentially and free of charge!



Your personal guide to the Business Location



Gerlinde Gahleitner

Team Lead & Director
Western Europe

INVEST in AUSTRIA

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