Technologické parky: rozvoj a investičné príležitosti pre Košicko –Prešovskú aglomeráciu

KOŠICE REGION

Agenda-prezentácie

- Paradigma reg. politiky
- Kreovanie VTP
- Lokalizácia VTP;
- VTP a univerzity;
- VTP a ich kontext;
- Infraštruktúra VTP
- Financovanie VTP
- Vlastníctvo VTP
- Makroprostredie VTP
- Špecializácia VTP
- Servis parkov
- Nájomcovia a zamestnanosť v VTP
- Faktory úspechu

Paradigma v posune regionalnej politiky

|	Traditional regional policies	New paradigm
Objectives	Balancing economic performances by temporarily compensating for disparities	*Tapping under-utilised potential to enhance regional competitiveness*
Strategies	Sectoral approaches	*Integrated development projects*
Tools	*Subsidies and state aids*	Soft and hard infrastructures
Actors	*Central government*	Different levels of government & …...

Regionálny inovačný systém v KSK

EU Inovacná politika

Vláda a R&D Centrálne Autority

Národná inovačná politika

EU SF Prevádzk

Banky

Regional VCs a BAs

Ostatný Sprestredk
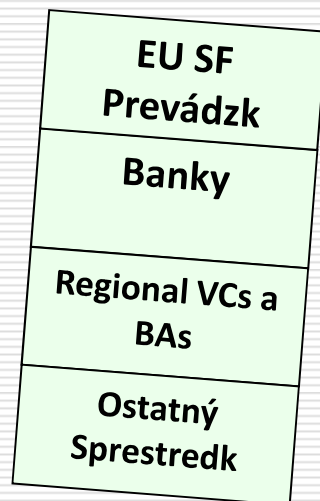
Regional Autority / Lokálane Atority
Regionalna Rozvojová Stratégia a Programy
Regional Inovacná Strategia

ARR Košice

Regional Agentúry

Vládne agentúry

SOPK

Knowledge operatori

Univerzity   **R&D Inštitúcie**
CE   VTP   BIC   ICs

Regional Priemyselné Klustre

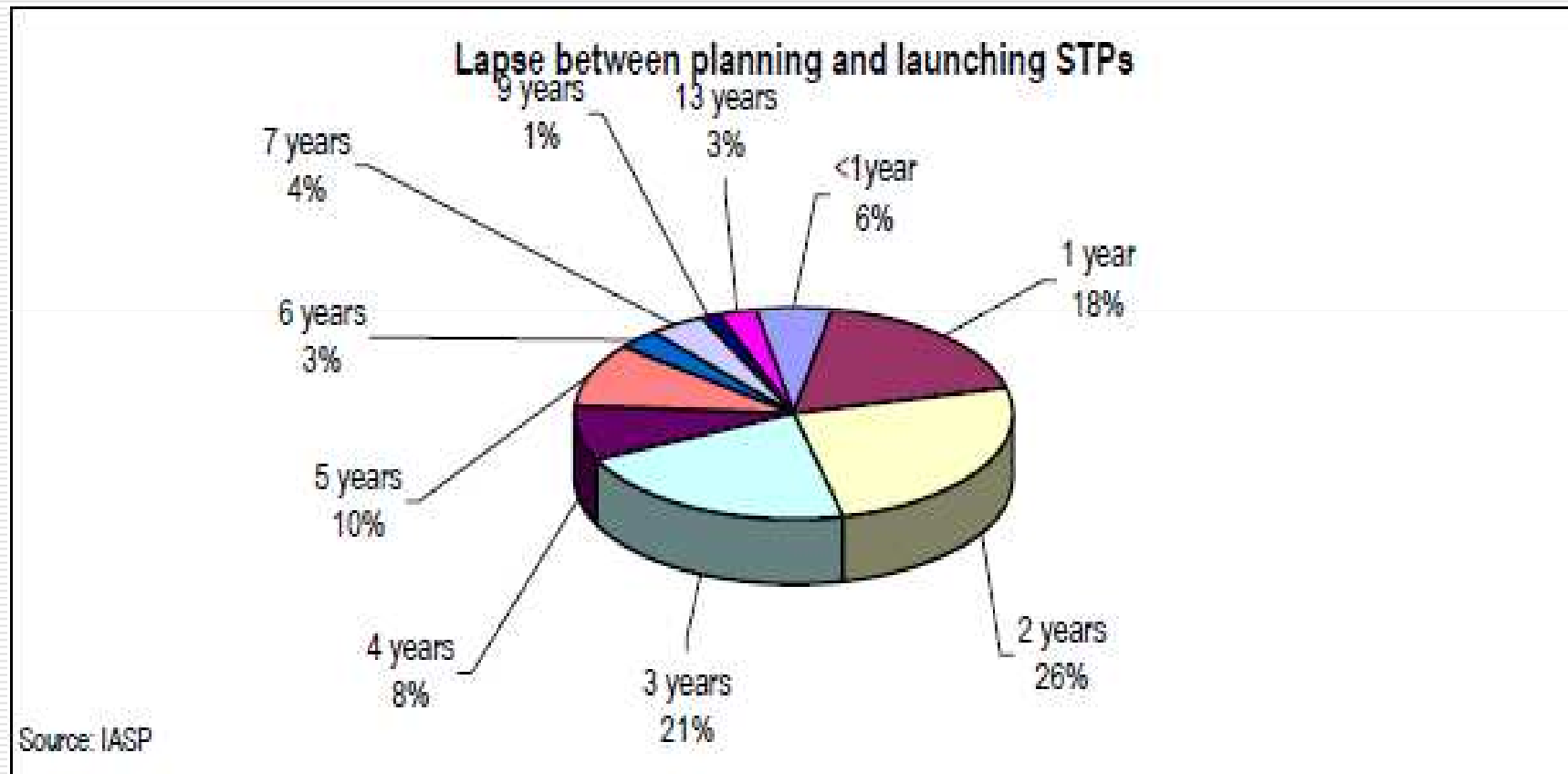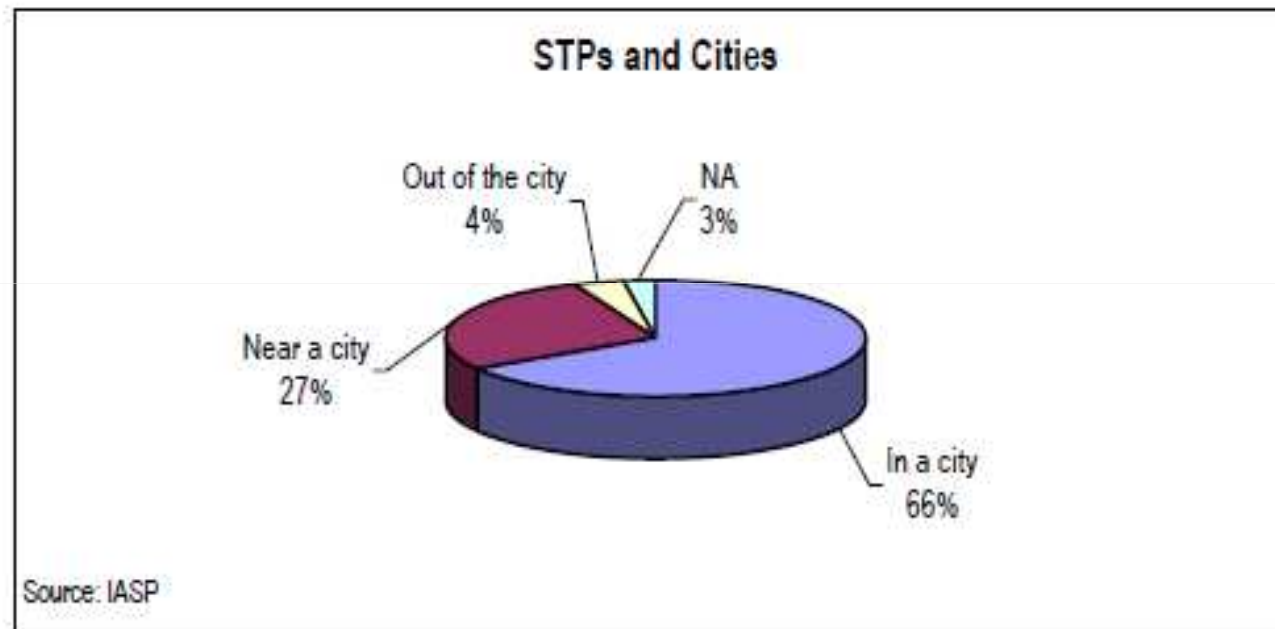| Stará Ekonomika Indigenous	MNCs	Nová Ekonomika Innovátori

Uživatelia znalosti

Posilnenie konkurencieschopnosti pomocou regionálneho manažmentu územia

Universities
R&D centers

Institutions
Banks
Ass.n of entrepreneurs

SME
SME
SME
SME
SME
SME
SME
SME
SME

S.T.P.

project management
data mining
market analyses
technology transfer
business connections
new business start up
venture capital connections
head hunting
training
JV development
KH acquisition/sales
companies acquisition/sales
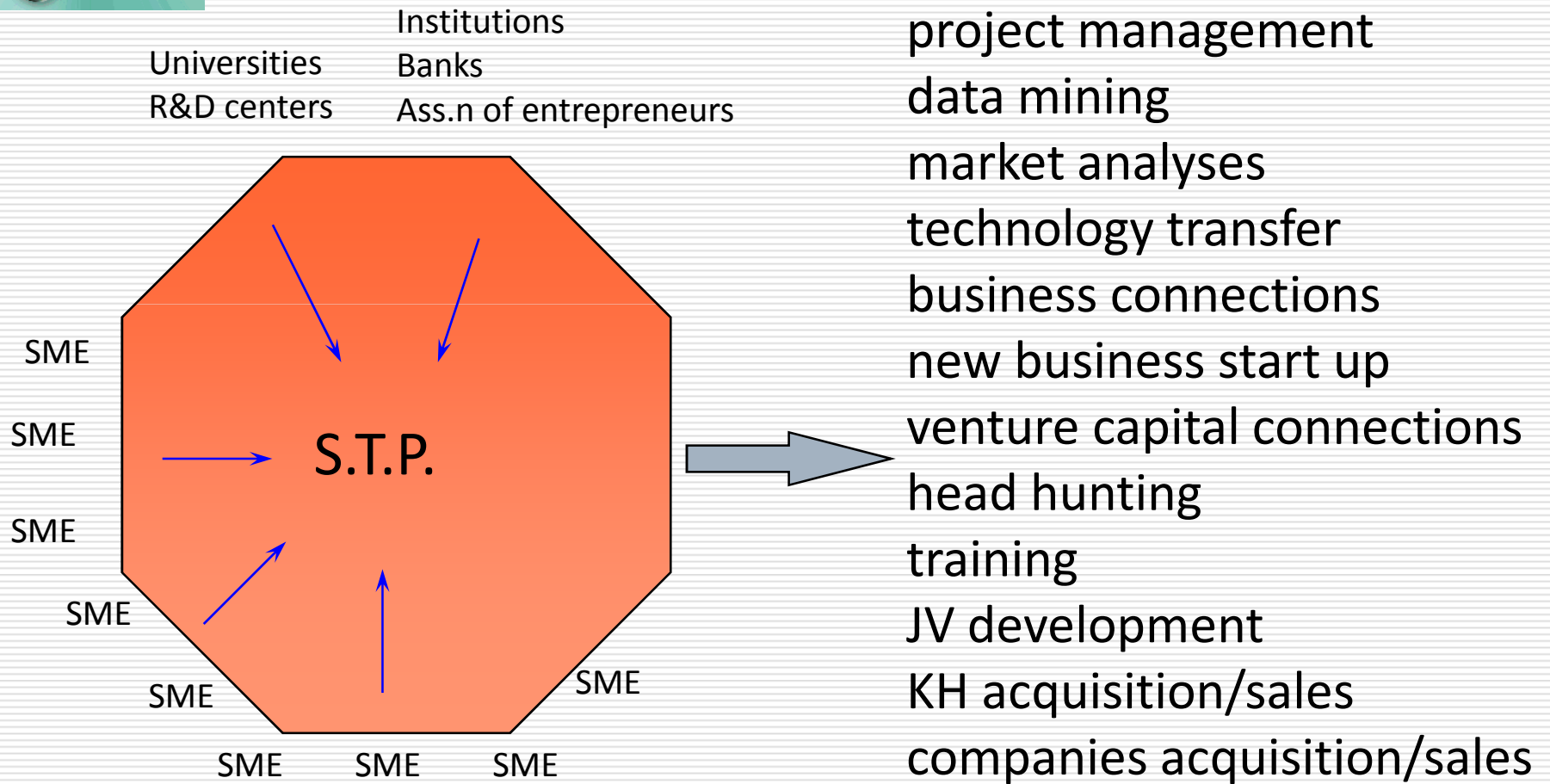
Doba medzi plánovaním a otvorením –VTP parku

Lapse between planning and launching STPs

9 years 1%
13 years 3%
7 years 4%
<1year 6%
6 years 3%
1 year 18%
5 years 10%
2 years 26%
4 years 8%
3 years 21%

Source: IASP

Lokalizácia VTP vo väzbe na mestá

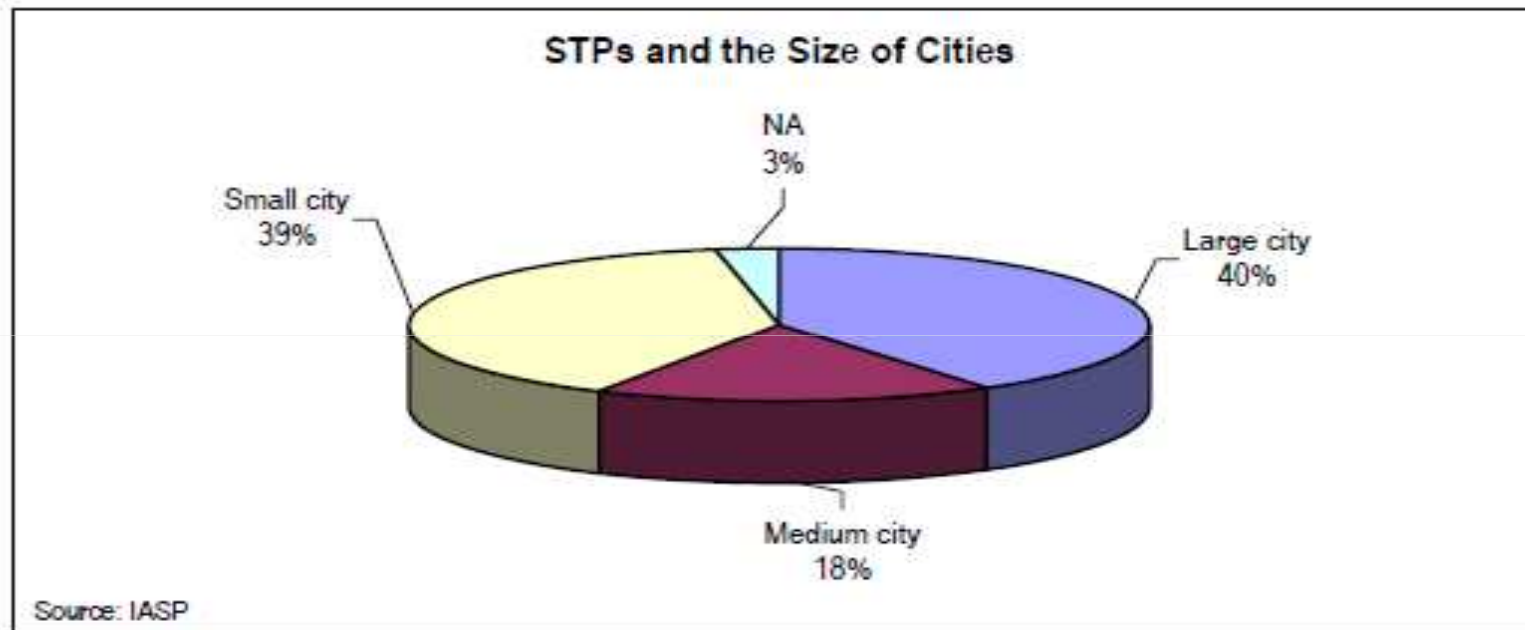**STPs and Cities**

Out of the city
4%

NA
3%

Near a city
27%

In a city
66%

Source: IASP

Pie Chart 5

Near a city = out of the city limits but within 25Km. from it.
Out of the city = >25Km. from the city.

VTP a veľkosť miest

STPs and the Size of Cities

NA 3%
Small city 39%
Large city 40%
Medium city 18%

Source: IASP

Pie Chart 6

Small city = <500,000 inhabitants
Medium city = between 500,000 and 1,000,000 inhabitants
Large city = >1,000,000 inhabitants

VTP a počet univerzít od neho v okruhu do 50 km

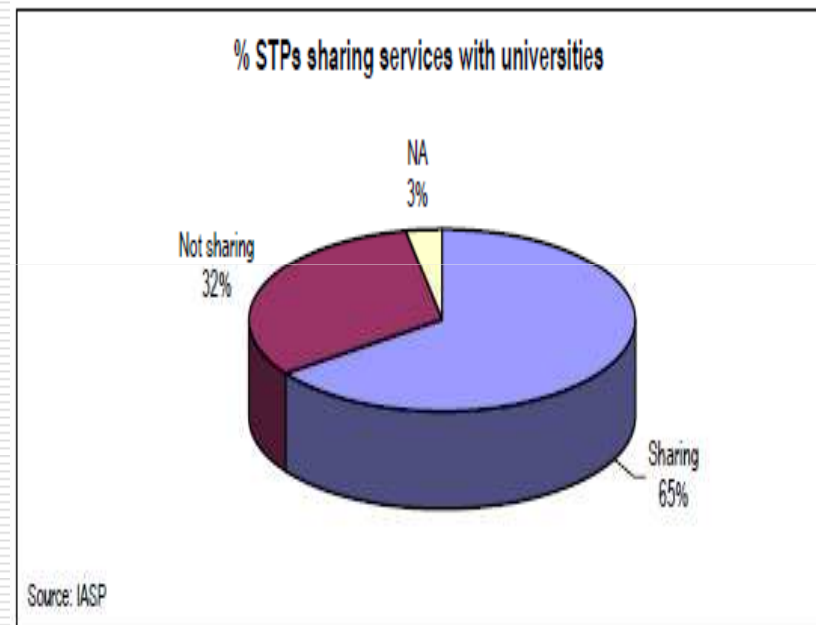
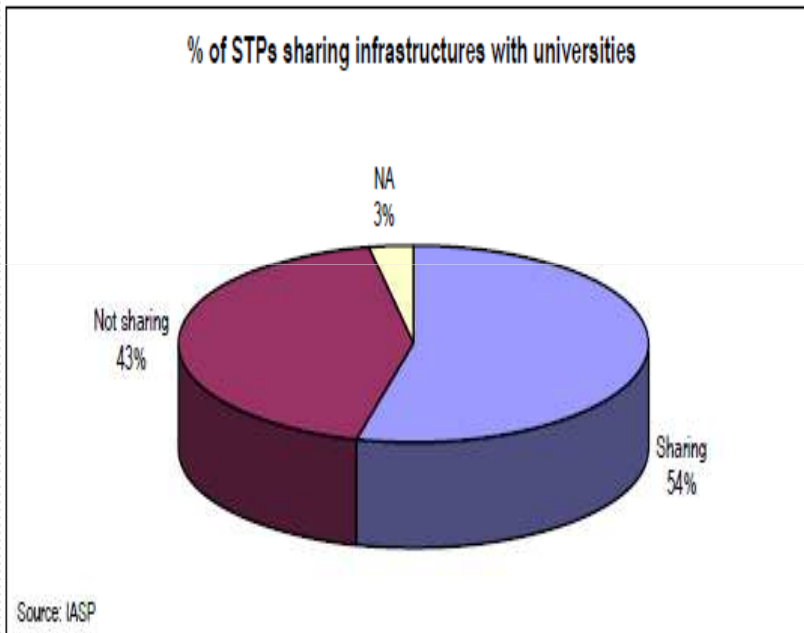STPs and the number of universities within a 50km radius

- NA 3%
- 1-5 37%
- 6-10 27%
- 11-20 12%
- 20+ 21%
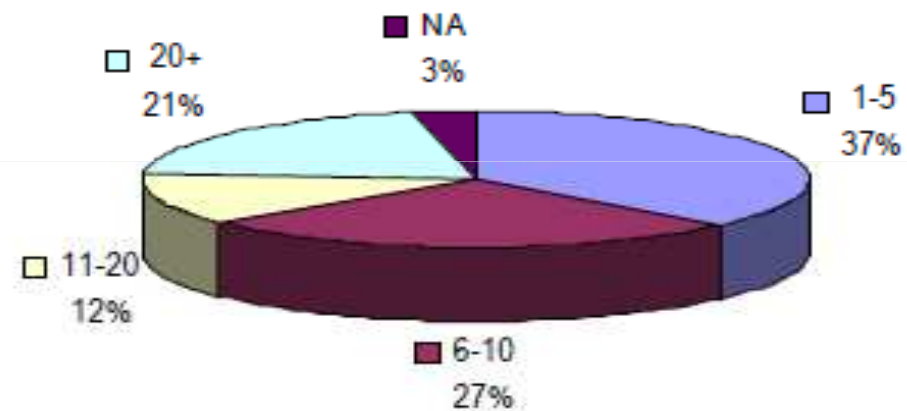
Source: IASP

How to read this graphic:
- 37% of STPs has between 1 and 5 universities within a 50Km. radius, etc.

# Interakcia medzi VTP a univerzitami – zdieľaná infraštruktúra, zdieľane služby

% of STPs sharing infrastructures with universities

NA 3%
Not sharing 43%
Sharing 54%

Source: IASP

% STPs sharing services with universities

NA 3%
Not sharing 32%
Sharing 65%

Source: IASP

Interakcia medzi univerzitami VTP zdieľané RaD skupiny , zdieľané kancelárie pre vonkajšie vzťahy
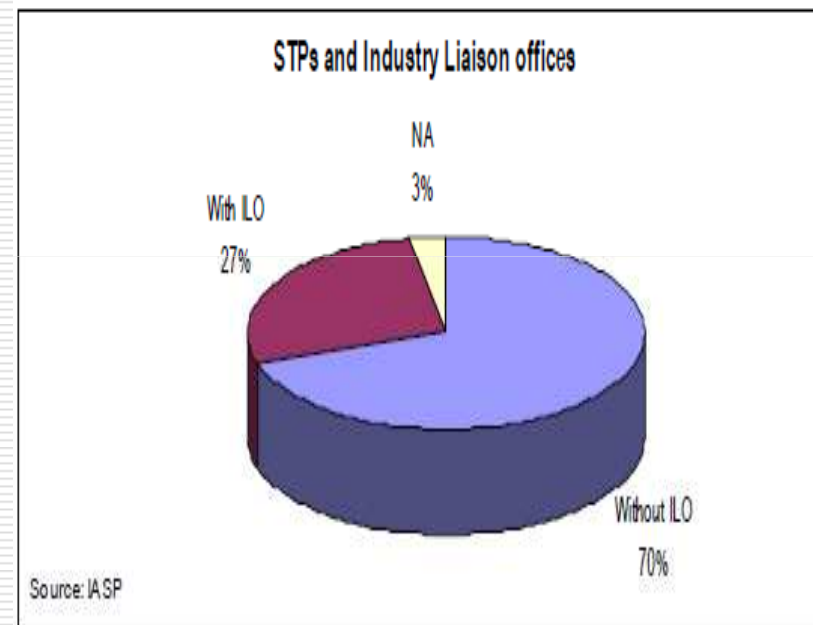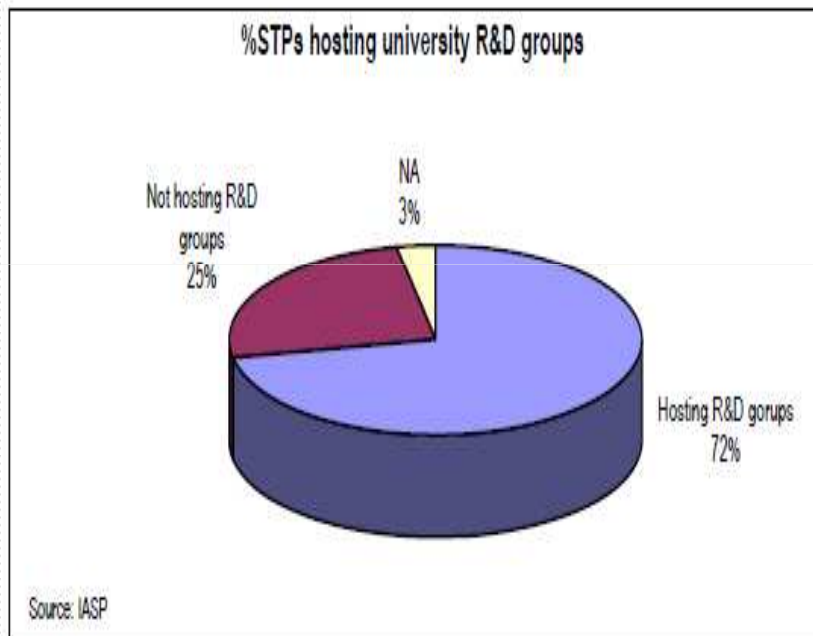
VTP a univerzity –intenzita vzťahov

STPs-University relation intensity

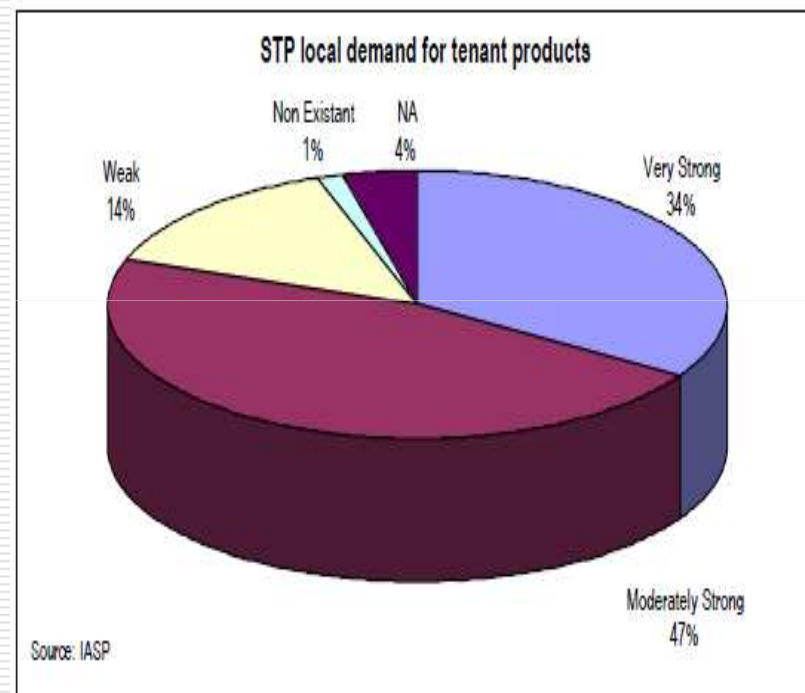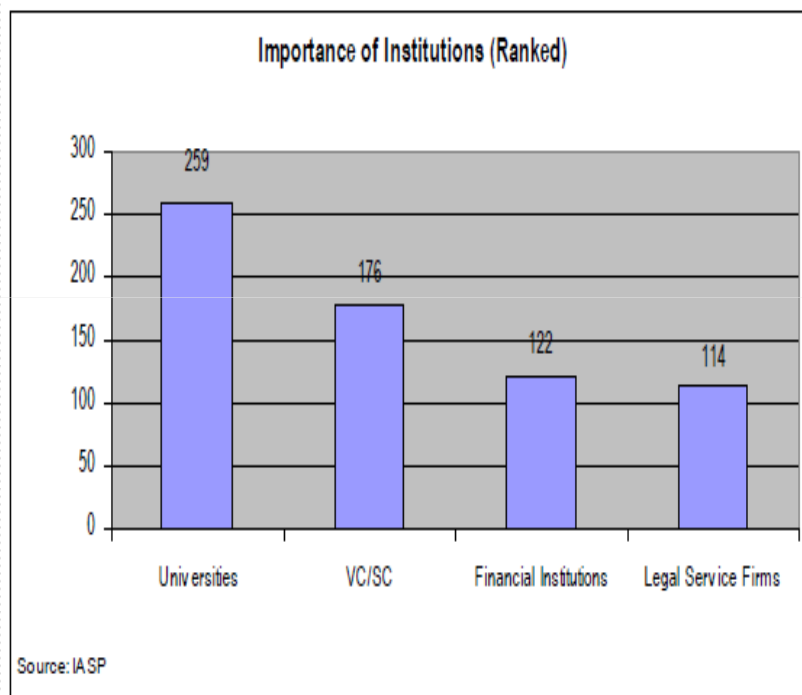4 14%   NA 3%   0 5%   1 18%   3 25%   2 35%
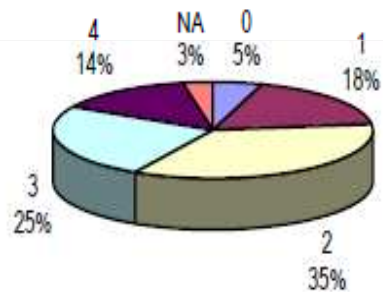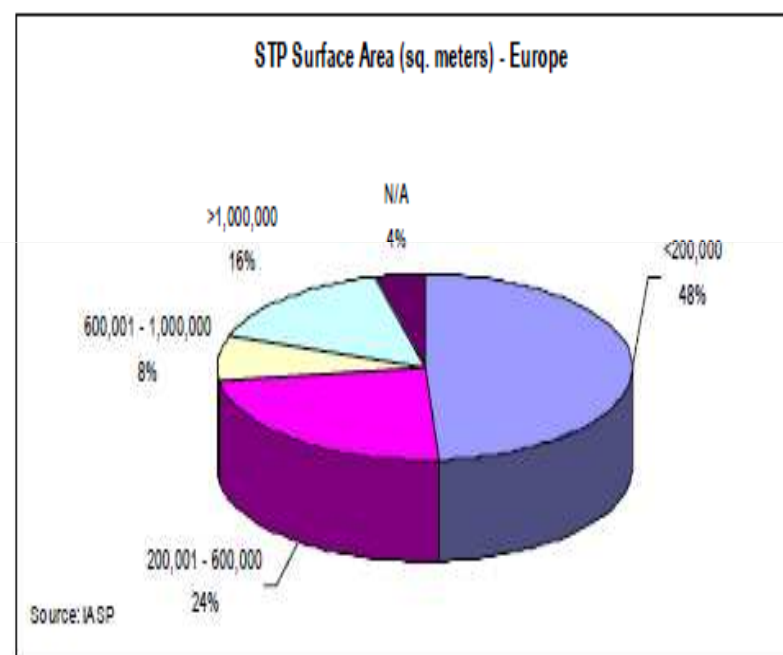
Source: IASP
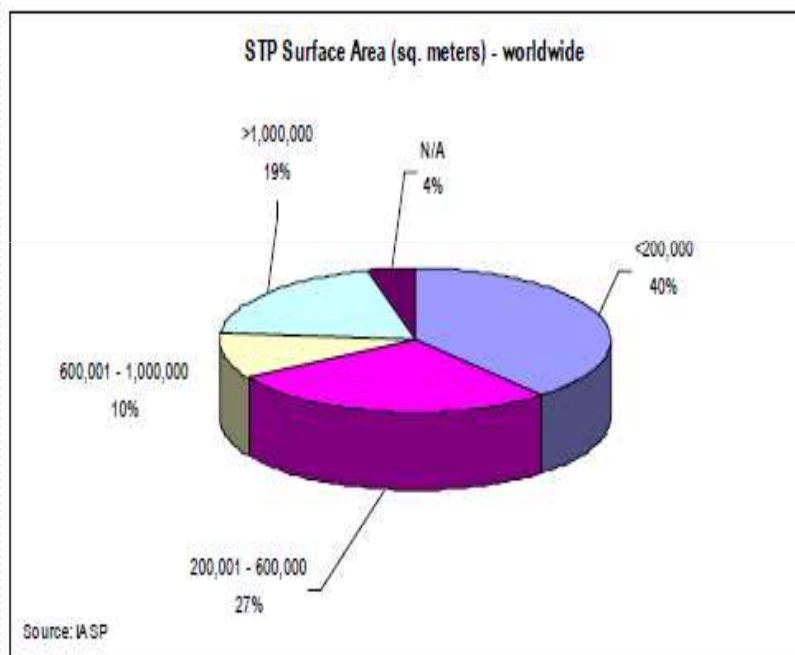
How to read this graphic:
Of the 4 parameters examined (sharing infrastructures, sharing services, hosting R&D groups, hosting ILO):

- 5% of STPs fulfils none of them,
- 18% of STPs fulfils one of them,
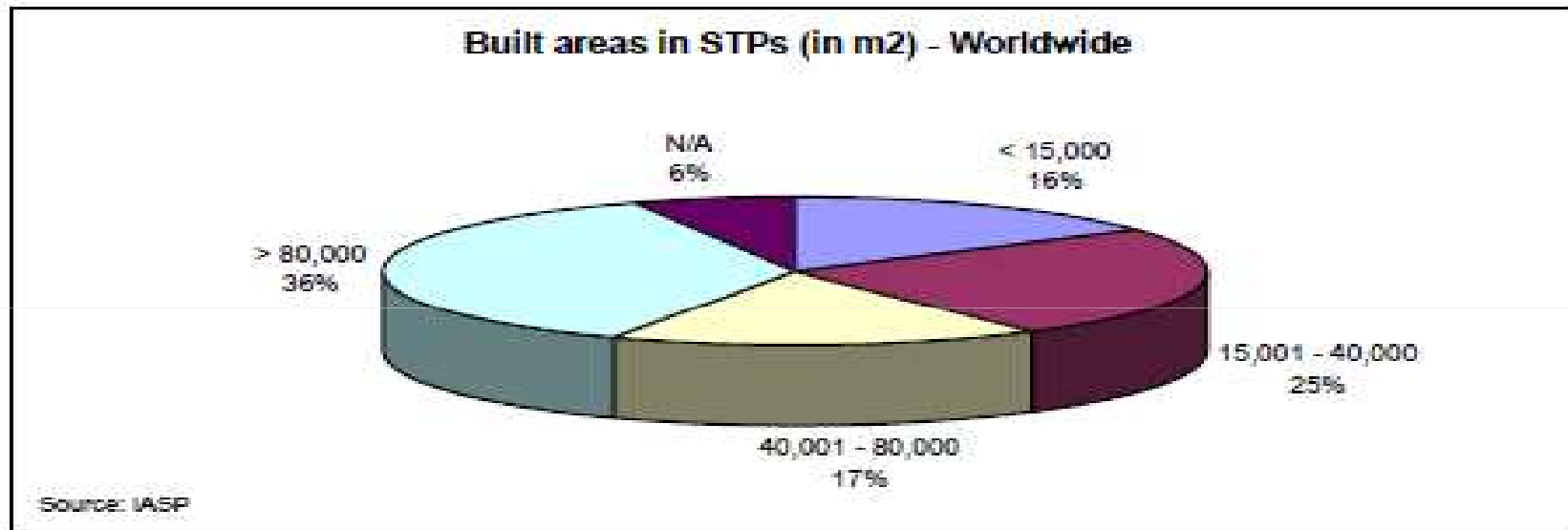- 35% of STPs fulfils 2 of them, etc.

Dôležitosť inštitúcii a využívanie výrobkov a ich služieb

Importance of Institutions (Ranked)

Source: IASP

STP local demand for tenant products

Source: IASP

VTP a infraštruktúra v tis m2

STP Surface Area (sq. meters) - worldwide

- >1,000,000 19%
- N/A 4%
- <200,000 40%
- 600,001 - 1,000,000 10%
- 200,001 - 600,000 27%

Source: IASP

STP Surface Area (sq. meters) - Europe

- >1,000,000 16%
- N/A 4%
- <200,000 48%
- 600,001 - 1,000,000 8%
- 200,001 - 600,000 24%

Source: IASP

VTP –počet výmera VTP vo svete, podiel zelených plôch

Built areas in STPs (in m2) - Worldwide

N/A 6%
< 15,000 16%
> 80,000 36%
15,001 - 40,000 25%
40,001 - 80,000 17%

Source: IASP

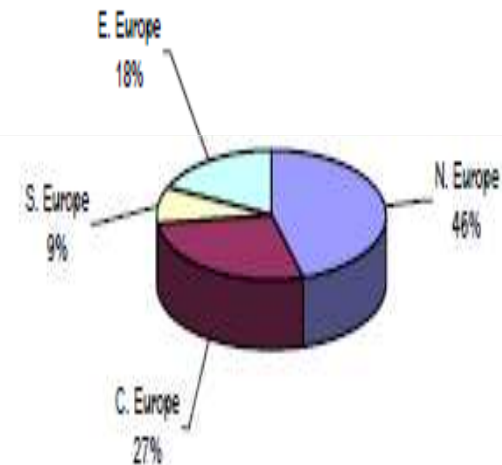|	% of the total surface destined to green areas - Europe				
	Less than 15%	15 – 30%	31 – 50%	Over 50%	NA
% of STPs	29%	27%	14%	22%	8%

Podiel parkov s výmerou 15-40000 m2 a 40-80 000 tis m v EU

STPs with a built area between 15,001 - 40,000 m2 (Europe)
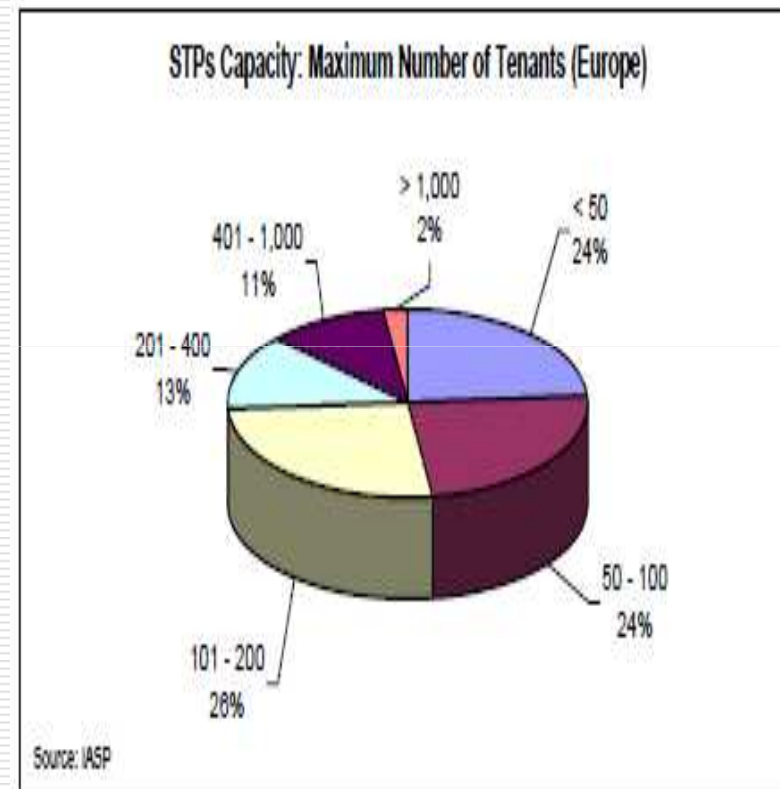
N. Europe 15%
C. Europe 31%
S. Europe 54%
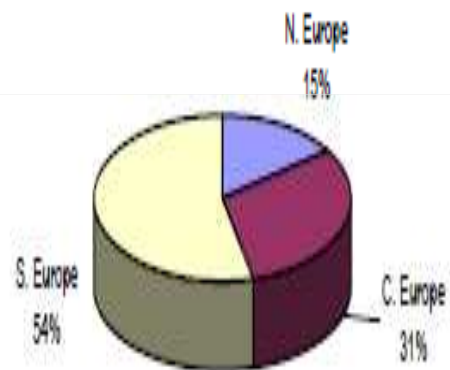
Source: IASP

STP with a built area between 40,001 - 80,000 m2 (Europe)

E. Europe 18%
N. Europe 46%
S. Europe 9%
C. Europe 27%

Source: IASP

Hlavné služby VTP a počet usídlených firiem

STPs elements (Worldwide)

STPs Capacity: Maximum Number of Tenants (Europe)

Rozpočet VTP

STPs Annual operaiting budget (Europe)
(Millions of Euro)
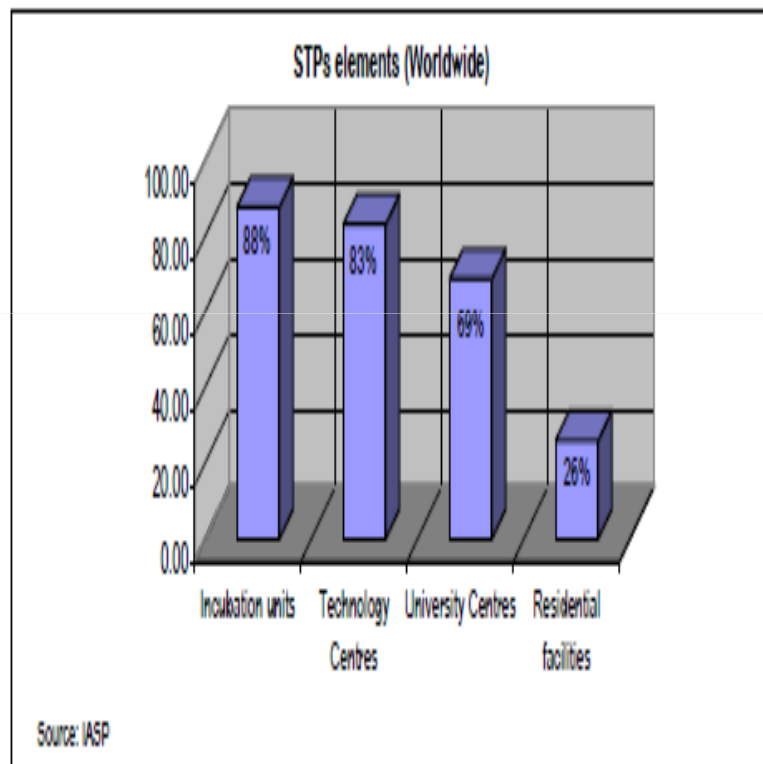
Source: IASP
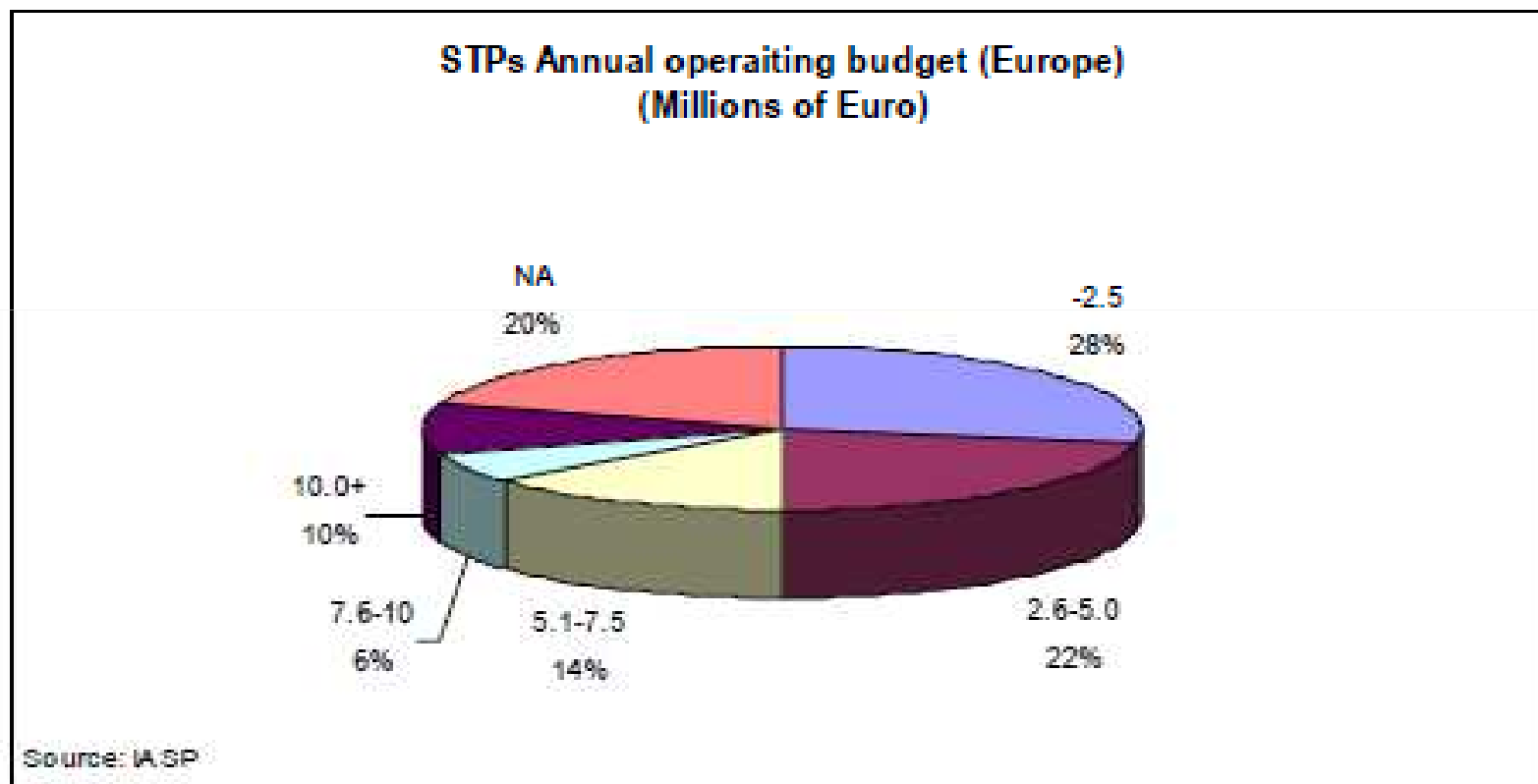
Vlastnícka štruktúra VTP
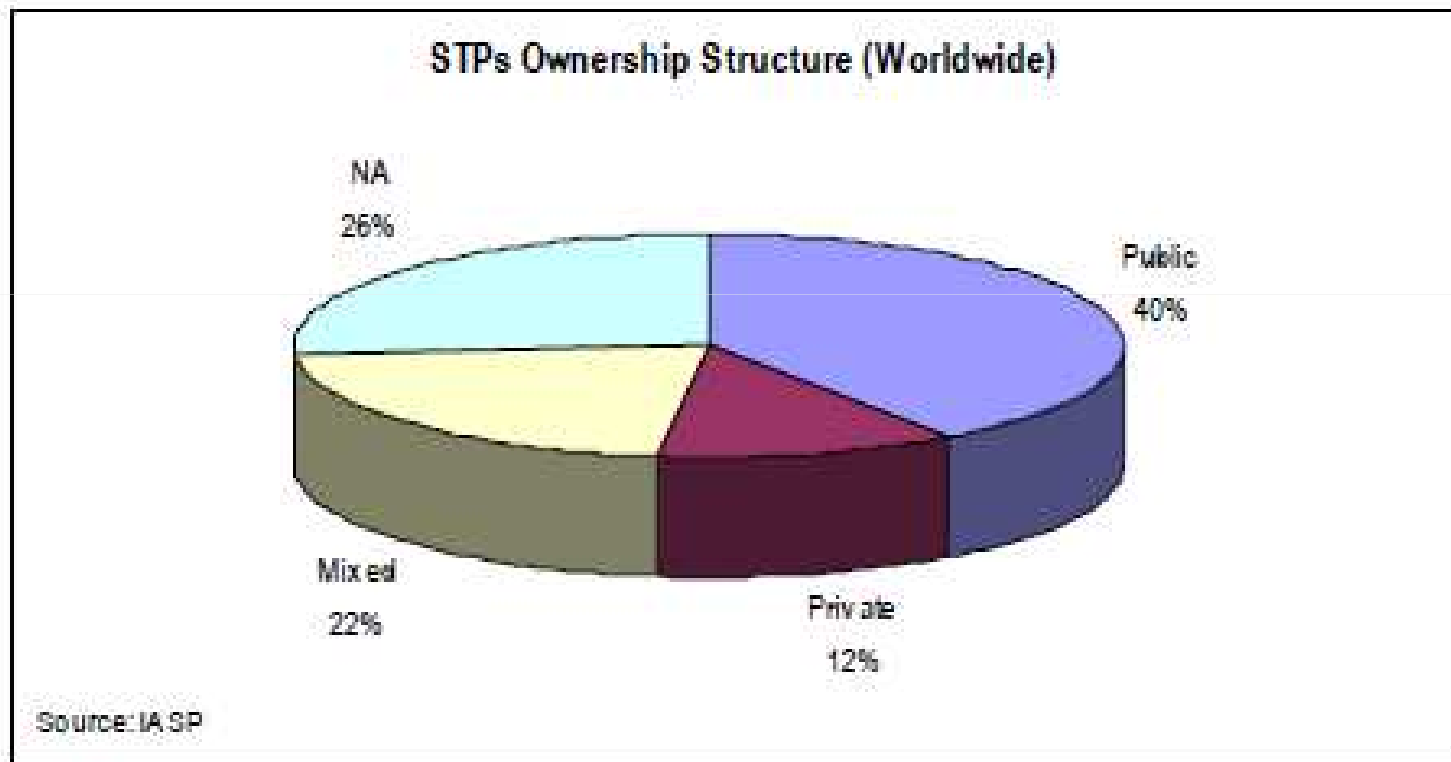
Štruktúra vlastníkov VTP verejného sektora

Vlastnícka štruktúra VTP-súkr.sektor
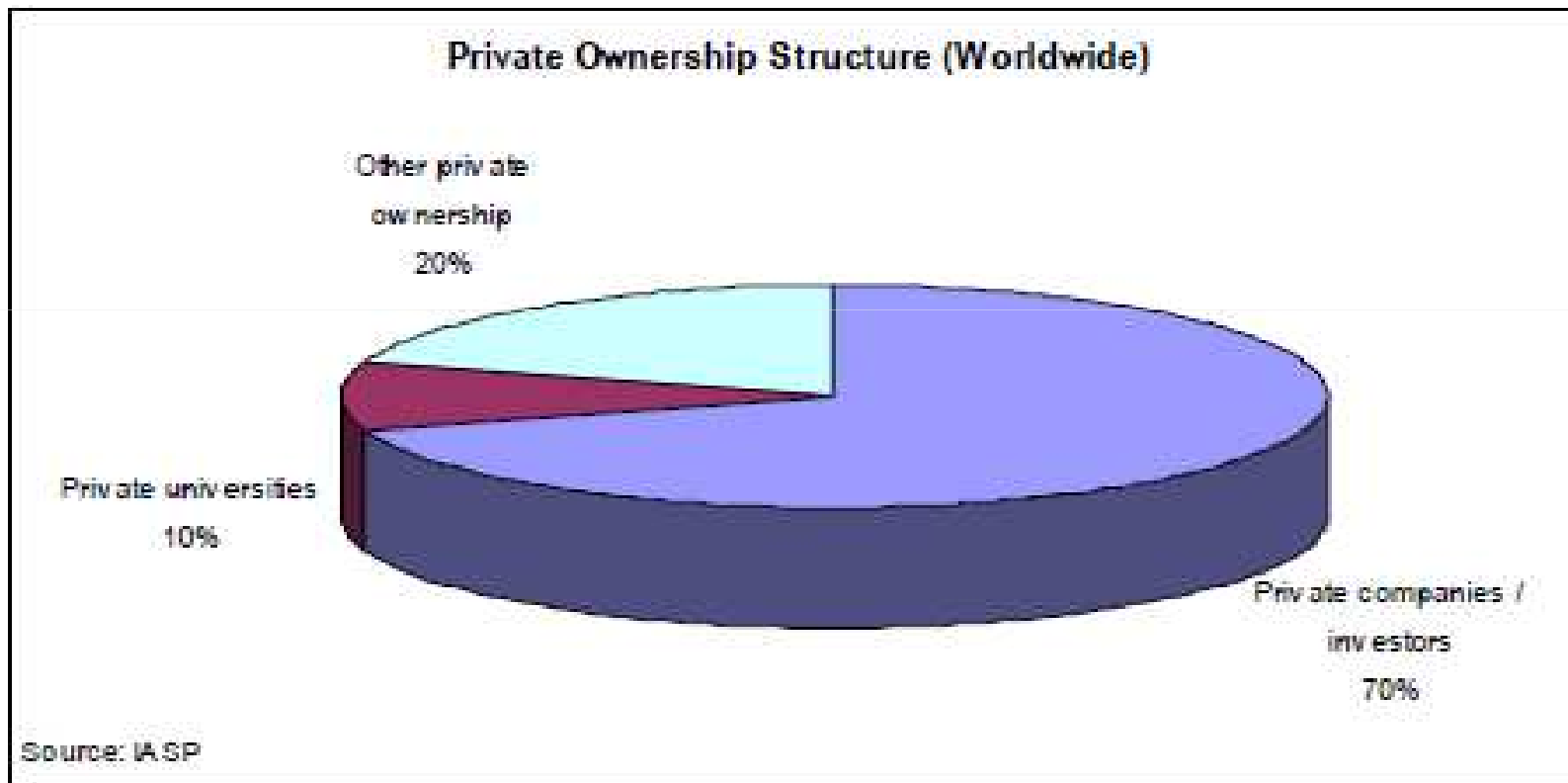
Zmiešaná vlastnícka štruktúra VTP

Mixed Ownership Structure (Worldwide)

NA
6%

Private majority
33%

Public majority
61%

Source: IASP
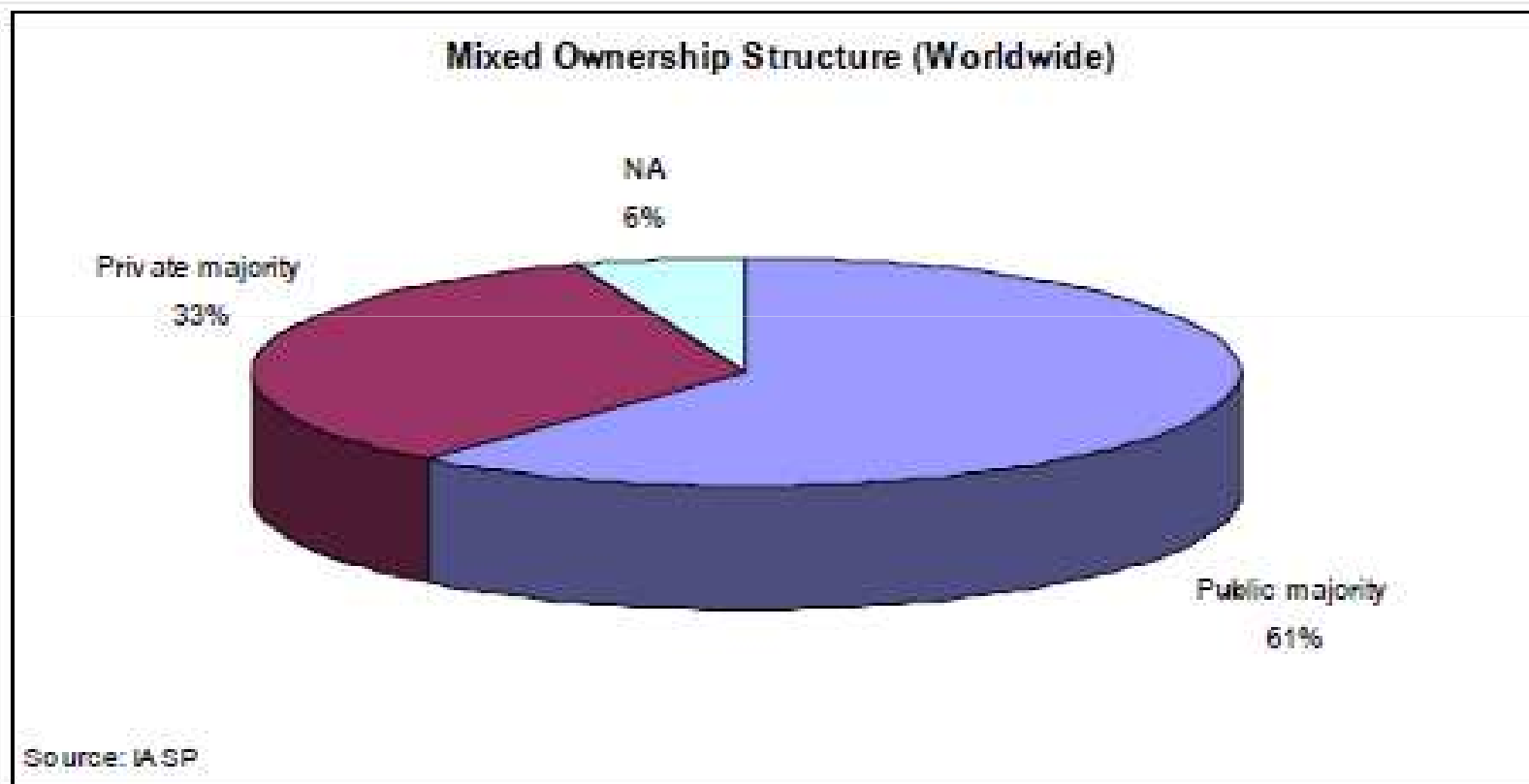
Zdroje financovania VTP

Sources of funding (Europe)
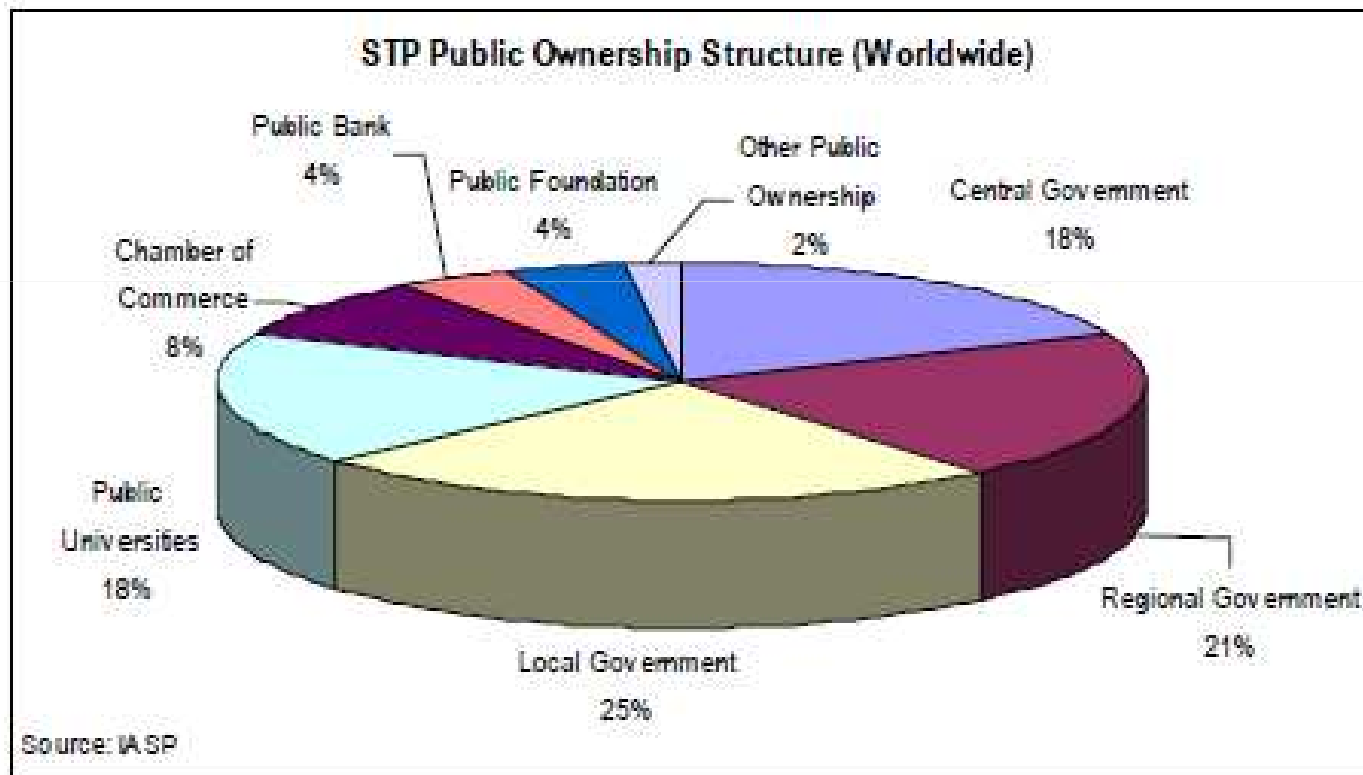
Services provision	174
Property rental income	171
Tenant fees	169
Public sector (Regional)	166
Public sector (National)	152
Public sector (Supernational)	115
Proporty sales income	110
Other	71

Source: IASP
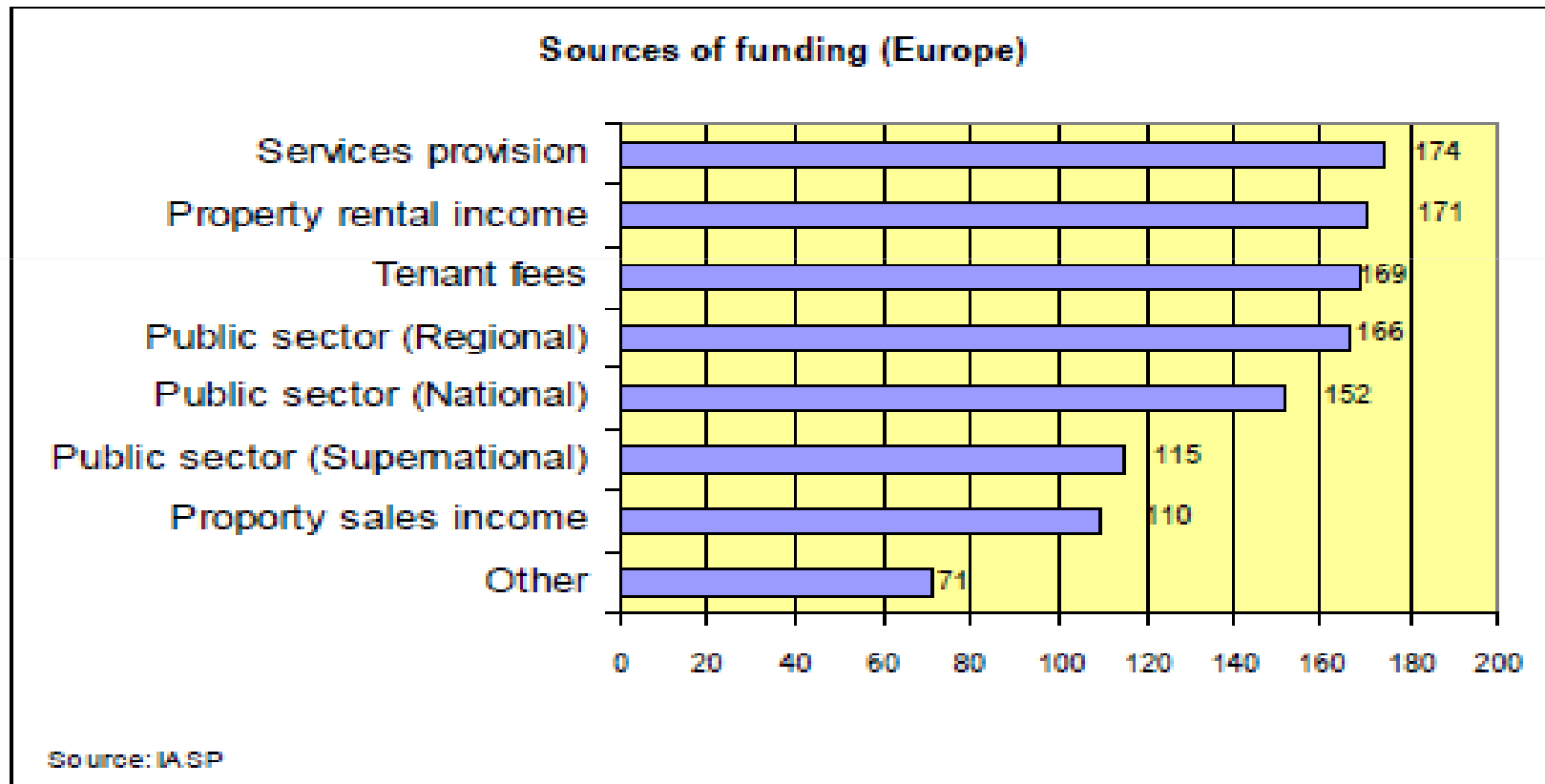
Manažerská štruktúra VTP

Organisations represented at STPs Boards of Directors or equivalent bodies (Worldwide)
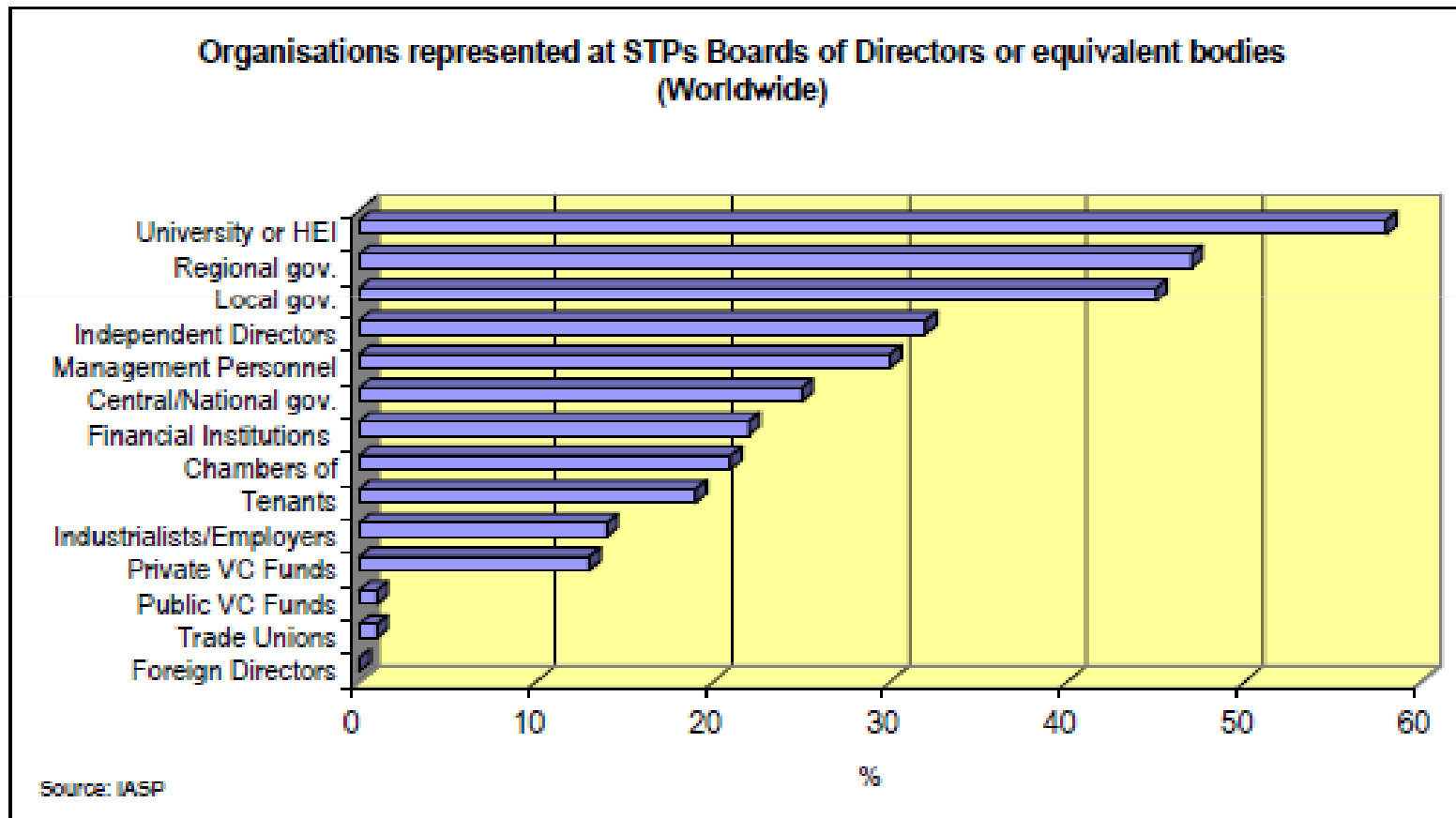
Source: IASP

Hlavné aktivity manažemntu VTP

STP Activities carried out by Management

Activity	%
Biz. Development/ Marketing	84
Strategic & Business Planning	82
Facility Management	79
Service Provision	75
Int. Relations Networking	75
Tenant recruitment & training	73
Financial Planning	58
Investor Relations	55
Other	9
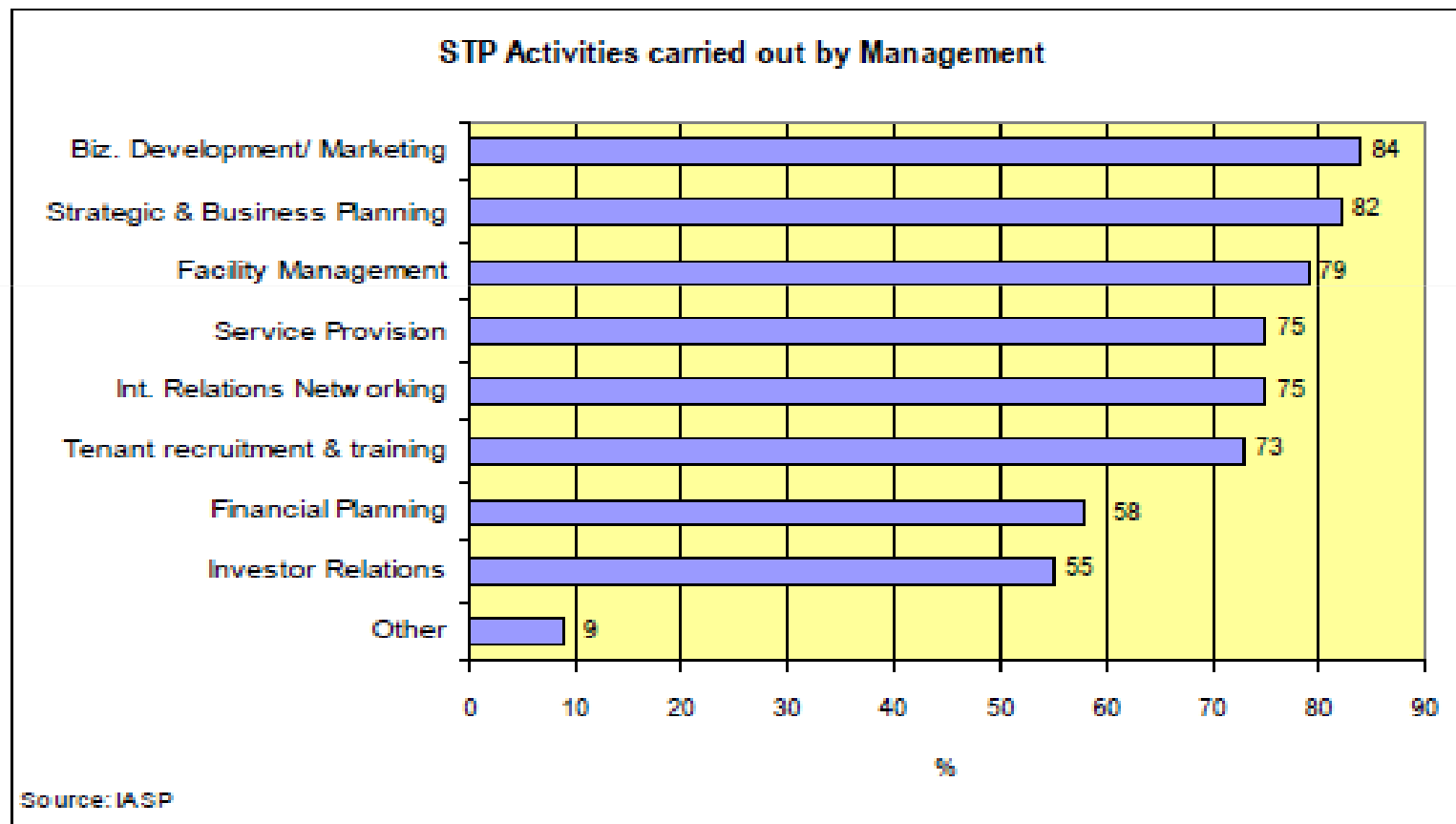
Source: IASP

Formy a % podiel vernej podpory VTP
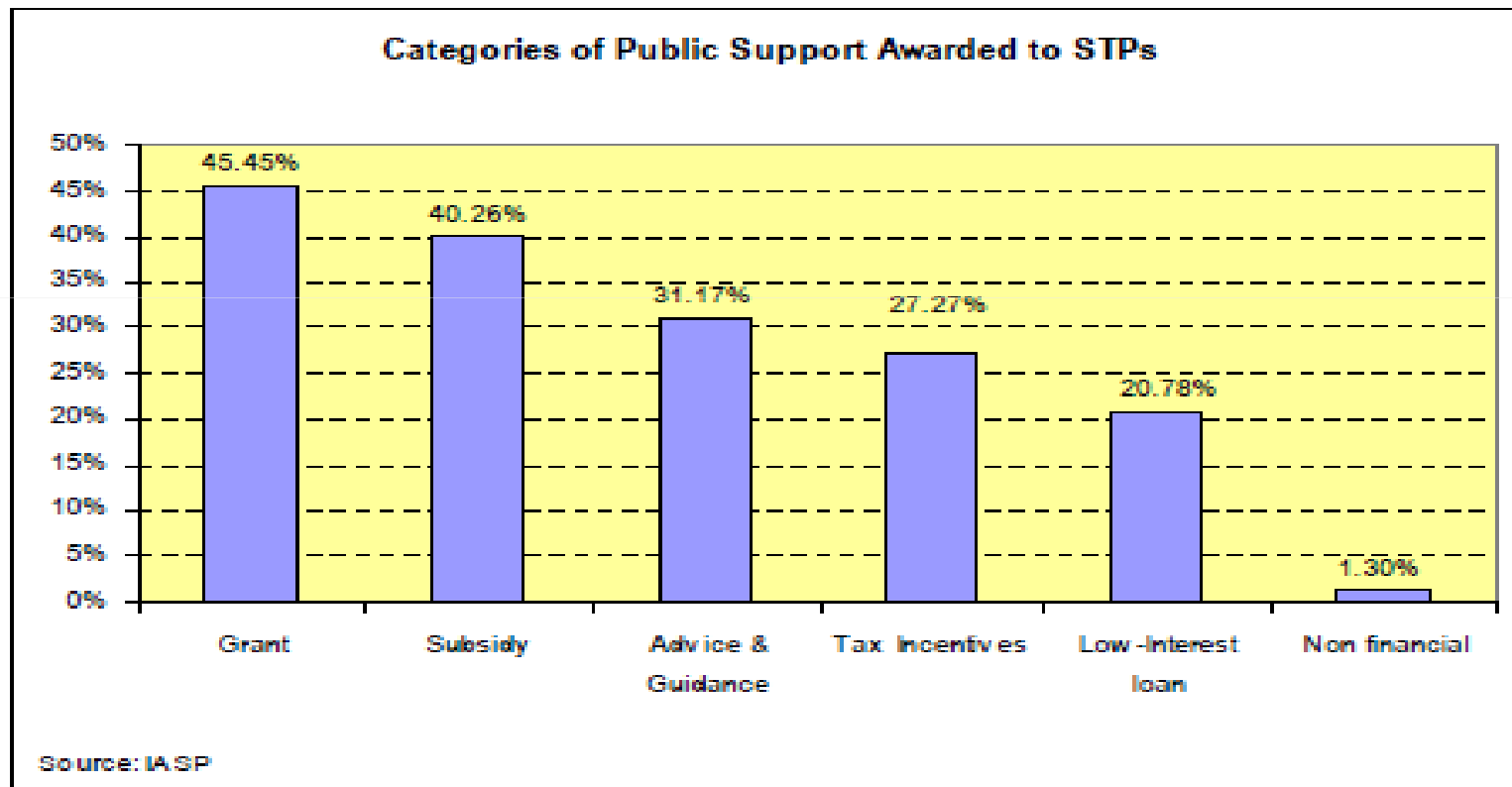
Hlavné ciele verejnej podpory VTP

Main Purposes of Public Support

Source: IASP

Fázy verejnej podpory VTP

Stage at which Public Support was granted (Worldwide)
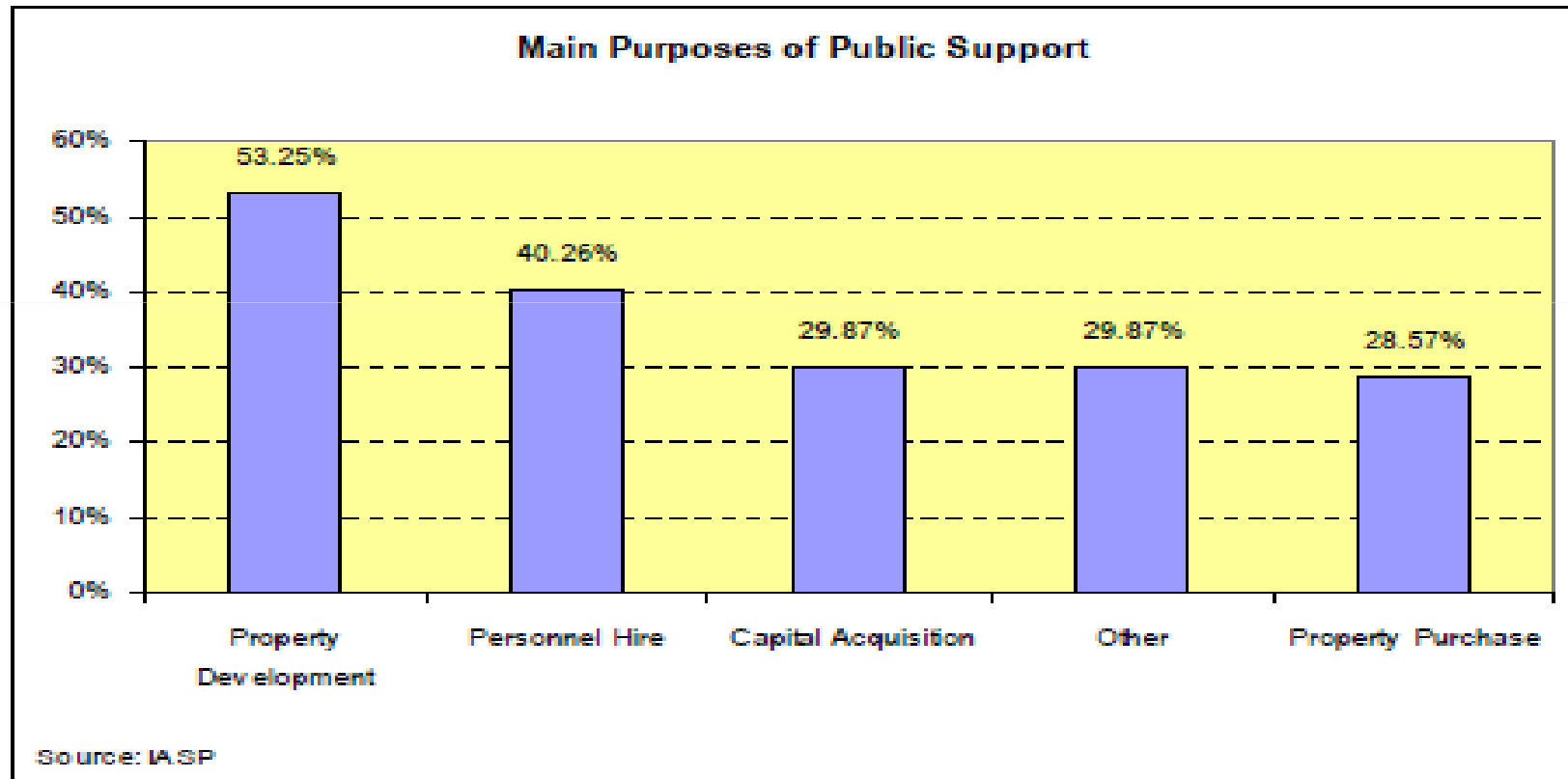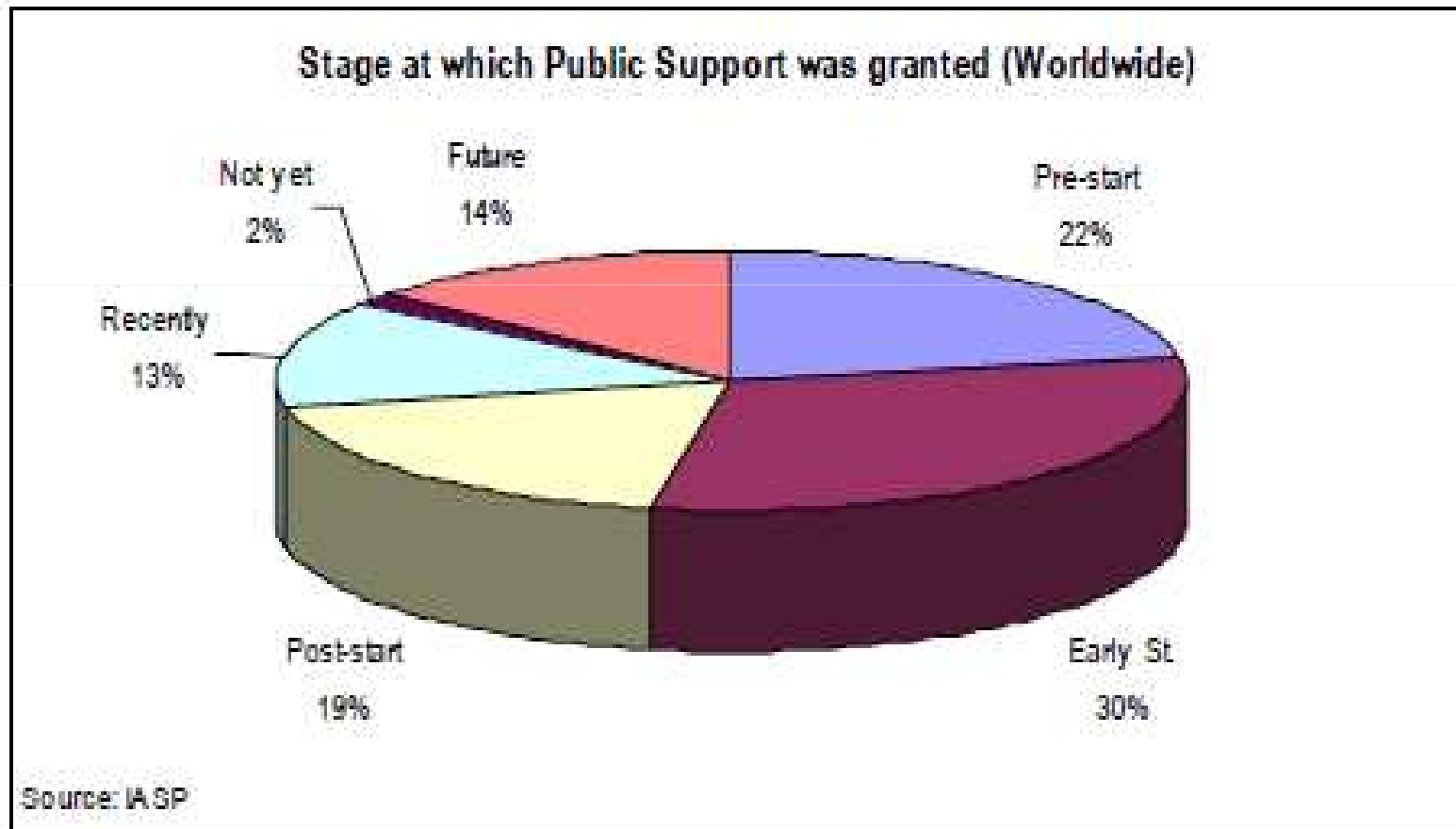
Source: IASP

Plná operačná podpora VTP a EU

Support Granted to fully operational parks (Europe)

E. Europe
15%

N. Europe
15%

C. Europe
23%
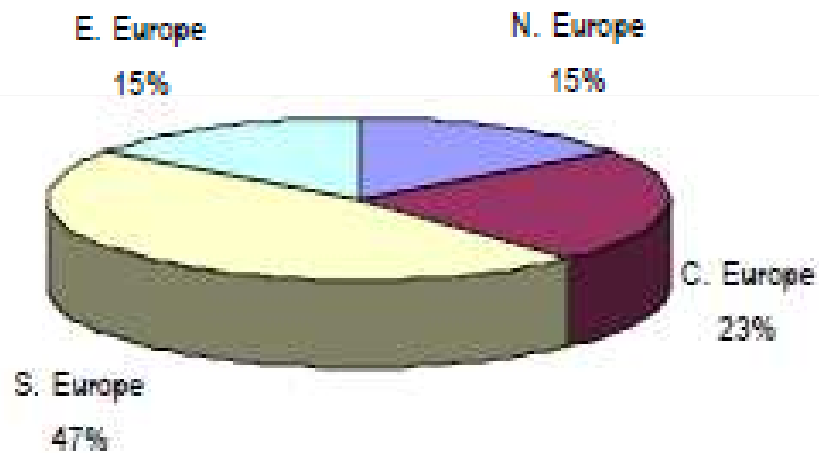
S. Europe
47%

Source: IA SP

Faktory ovplyvňujúce rozvoj VTP

Nosné aktivity VTP

STP Activities (Worldwide)

Activity	%
R&D	86
Training/ Education	81
Engineering/ Technical Services	81
Value Added Services	66
Manufacturing	42
Marketing	39
Office Centre	38
Other	6

%
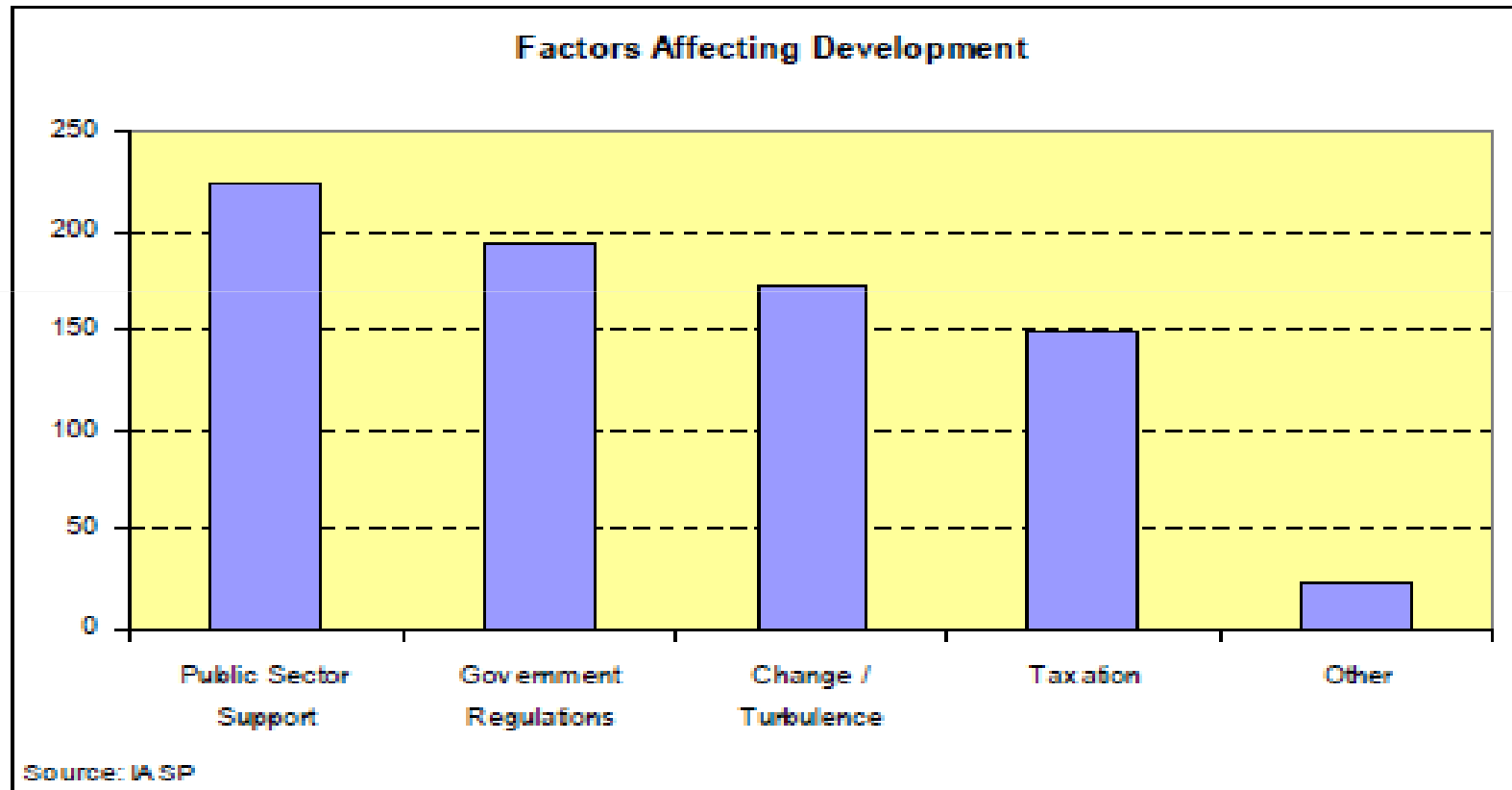
Source: IASP
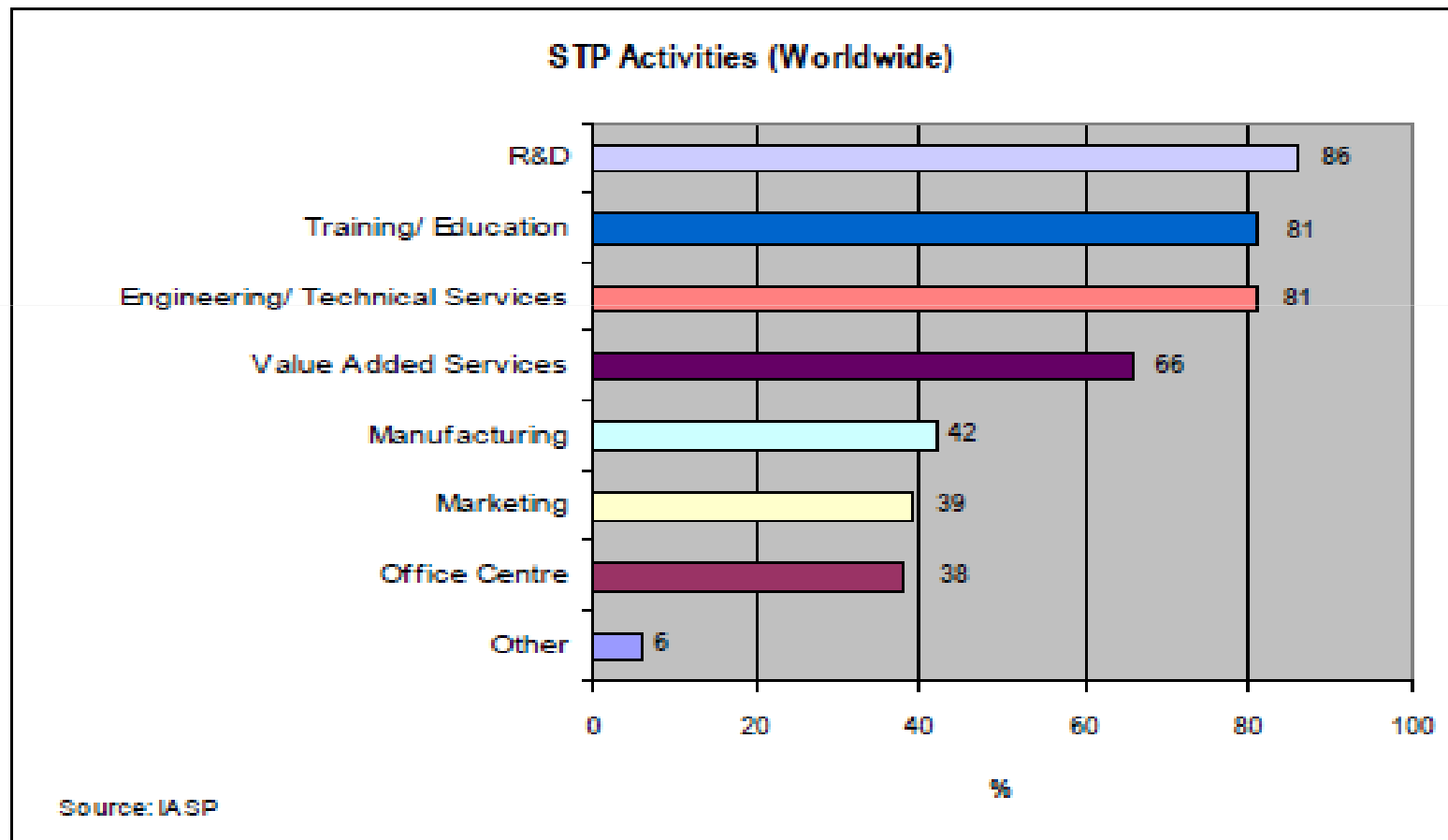
% Podiel odvetví v VTP

Industry / Technology sectors (Europe)	% of Parks by sector
Biotechnology / Life Sciences	84.31
IT / Telecommunications	76.47
Computers / Informatics	72.55
Software	72.55
Internet Technologies and Services	66.67
Environmental Technology	54.90
Design / Engineering services	52.94
Education	52.94
Chemistry	49.02
Industrial electronics	45.10
New Materials	45.10
Value-added Services	43.14
Pharmaceuticals	43.14
Energy Technology	39.22
Industrial / Manufacturing Systems	39.22
Food Technology	39.22
Pure research	35.29
Nanotechnology	33.33
Agro-food / Agriculture	33.33
Consumer electronics	25.49
Optics	19.61
Aeronautics / Aerospace	17.65
Tourism services	13.73
Trade Services	9.80
Sports Technology	9.80
Forest Technology & Industry	7.84
Off-shore Technology	7.84
Other	5.88

Hlavné služby VTP

High value-added services	% of Parks offering the service
Management support services	73
Seed fund access assistance	71
Intellectual property consulting	64
Networking (internal)	64
Training courses	60
Accounting/ Legal	58
Lab facilities	56
Marketing & Promotions	55
Networking (external)	53
Tenant development	53
Corporate Location Assistance	34
Own seed capital funds	30

Podporné služby VTP

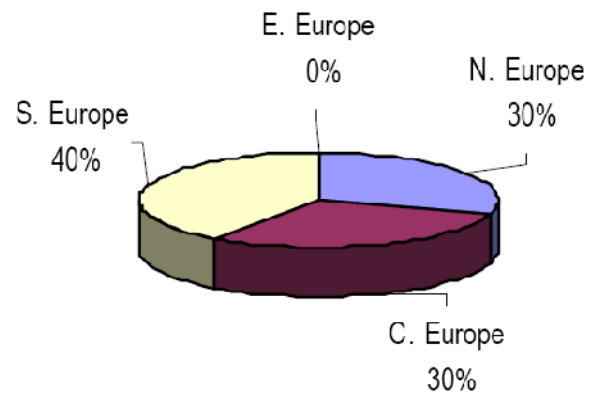| Ancillary services	% of Parks offering the service
Meeting rooms	87
Cafeteria	82
Auditorium/ Conference room	79
Catering	75
Security surveillance (24hr)	71
Public transportation	62
Restaurant	56
Electronic Security Systems (individual)	55
Video conference room	52
Electronic Security Systems (common)	48
Secretarial services	44
Event Planning	43
Public relations	39
Sports facilities	38
Banking services	35
Medical services	35
Kinder Garden	26
Golf facilities	23
Travel agency	23
Hotel	21
Shops etc	18
Security surveillance (working hours)	6
Others	6

Počet firiem etablovaných vo VTP
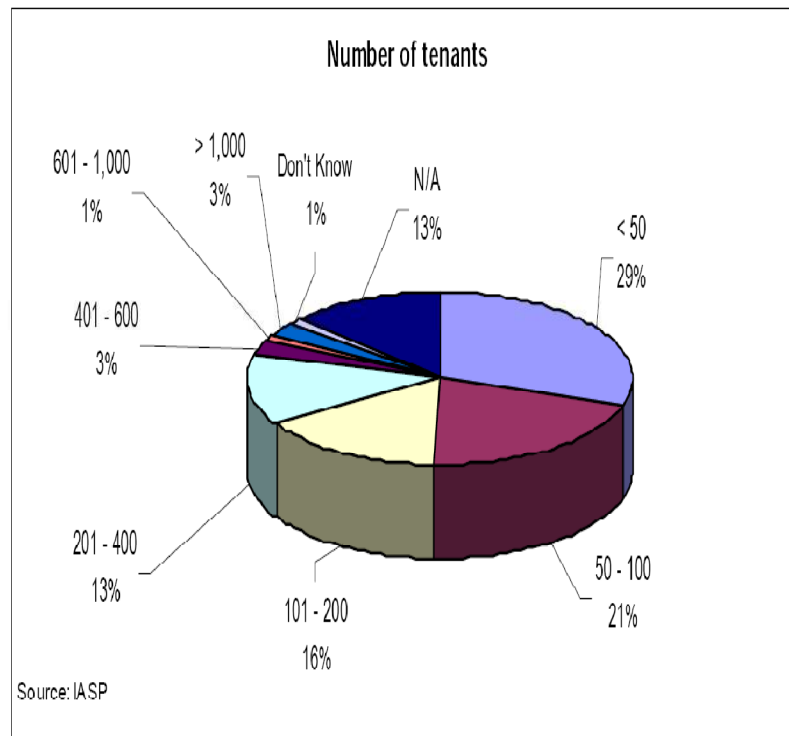
□ 50% of STPs world wide have, as per today, 100 resident companies or less. At the other end, 20% have more than 200 companies. Middle-size STPs (those with 101 to 200 companies) represent 16% of the Parks world wide.

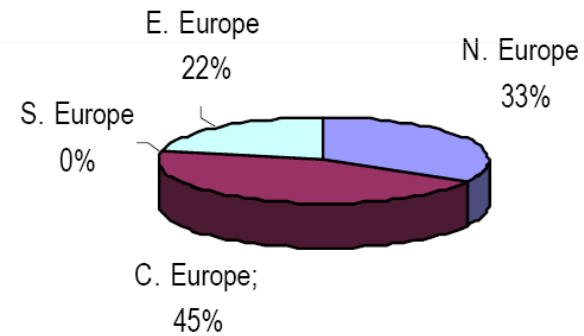# Podiel firiem v parkoch v EU

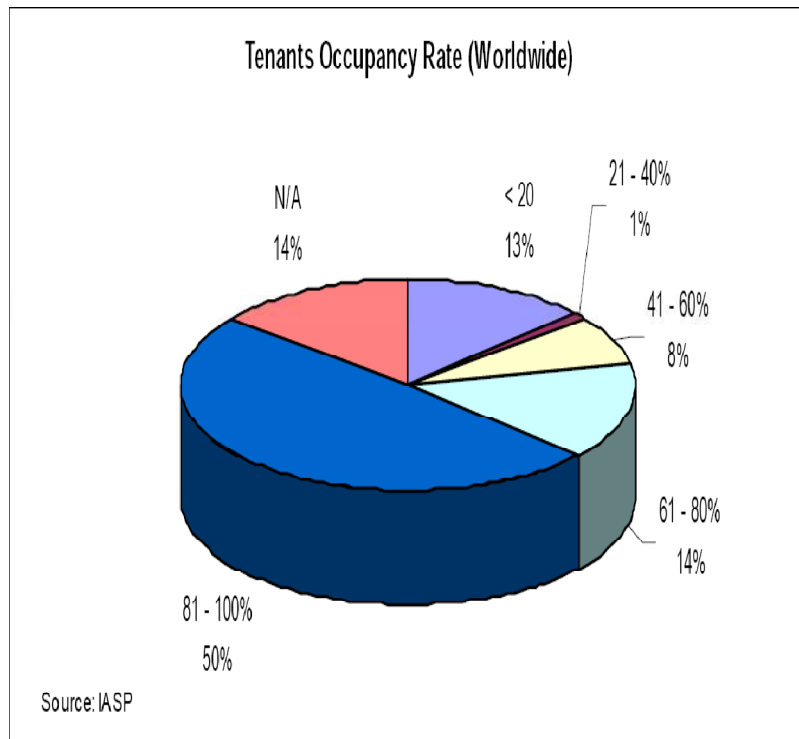
% of Parks with 50 to 100 companies

E. Europe 0%
N. Europe 30%
S. Europe 40%
C. Europe 30%

Source: IASP

% of Parks with 101 to 200 companies

E. Europe 22%
N. Europe 33%
S. Europe 0%
C. Europe; 45%

Source: IASP

Obsadenosť VTP

Tenants Occupancy Rate (Worldwide)

N/A 14%

< 20 13%

21 - 40% 1%

41 - 60% 8%

61 - 80% 14%

81 - 100% 50%

Source: IASP

☐ 50% of STPs are quite 'full', with an occupancy rate between 81% and 100% of their total capacity.
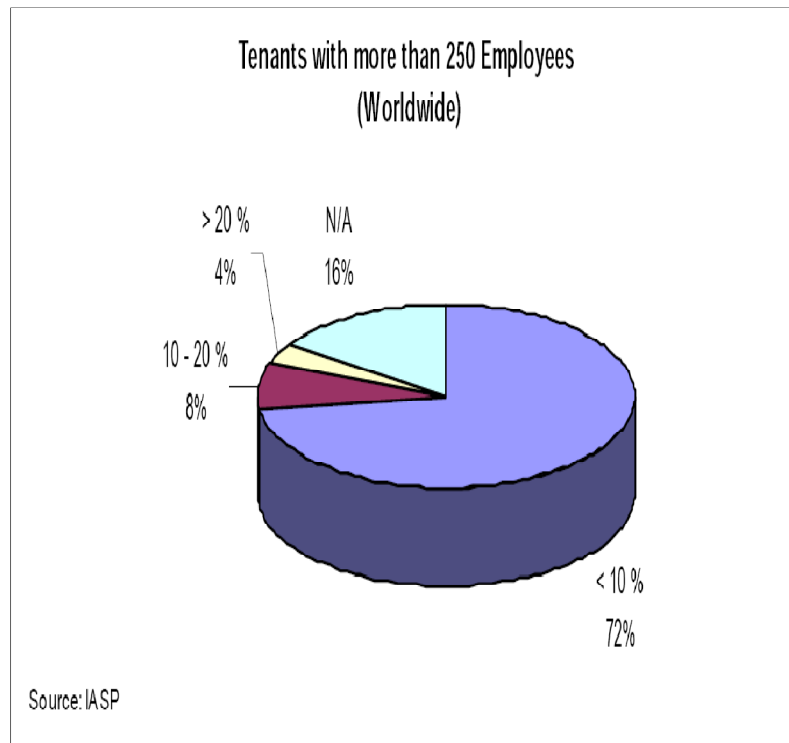
Odkiaľ pochádzajú firmy

- The STPs with the largest proportion of regional tenants are located in Central and in Southern Europe (34% and 33% respectively).

- Southern European Parks are, by far, the ones that have more foreign tenants.

- Northern Europe is the region that holds the highest number of STPs with national tenants.

Tenant's Origin (Europe)

International 8%
N/A 8%
Local 24%
National 25%
Regional 35%
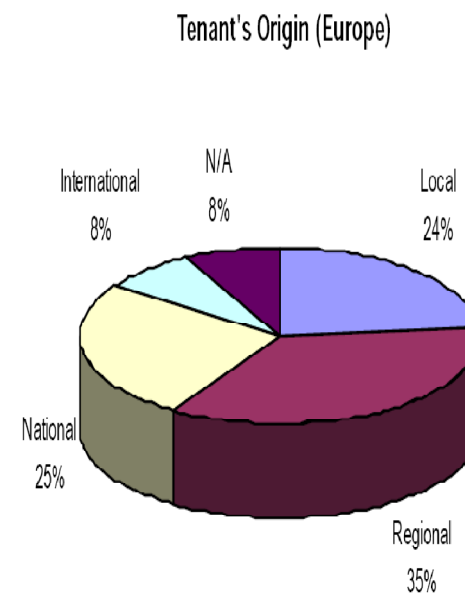
Source: IASP

Podiel firiem v VTP nad 250 zamestnancov

Tenants with more than 250 Employees (Worldwide)

> 20 %
4%

N/A
16%

10 - 20 %
8%

< 10 %
72%

Source: IASP

- 72% of STPs have less than 10% of tenants with more than 250 employees

- In 8% of STPs, tenants with more that 250 employees represent 10% to 20% of all the Park tenants, etc.

Podiel MNC vo VTP

Multinational Corporation Tenants

NA 31.20%
<10% 37.70%
10% - 20% 20.80%
21% - 40% 5.20%
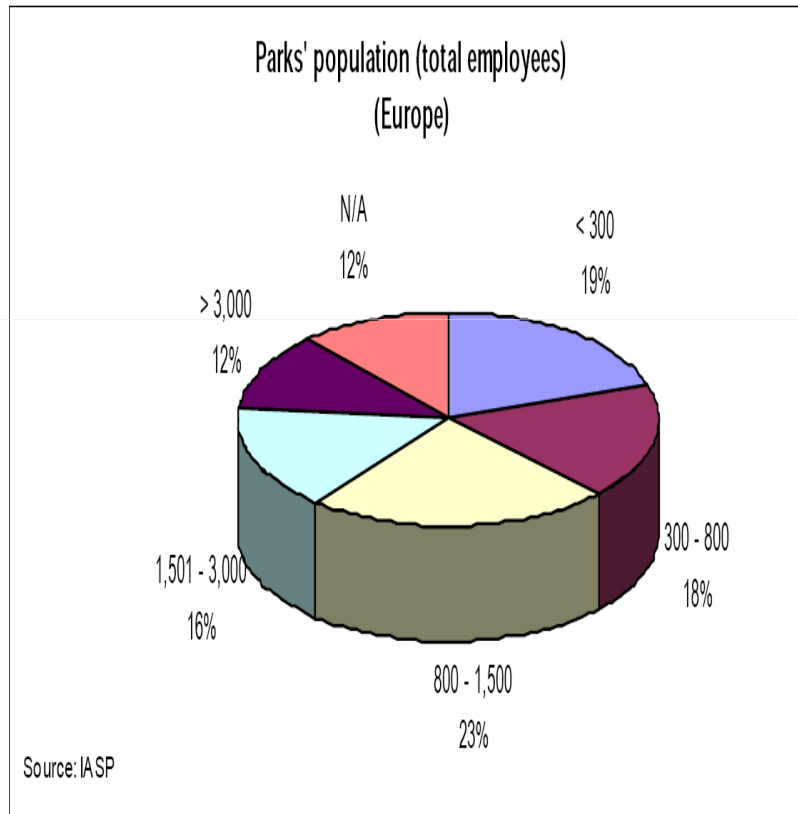41% - 60% 2.60%
61% - 80% 2.60%

Source: IASP
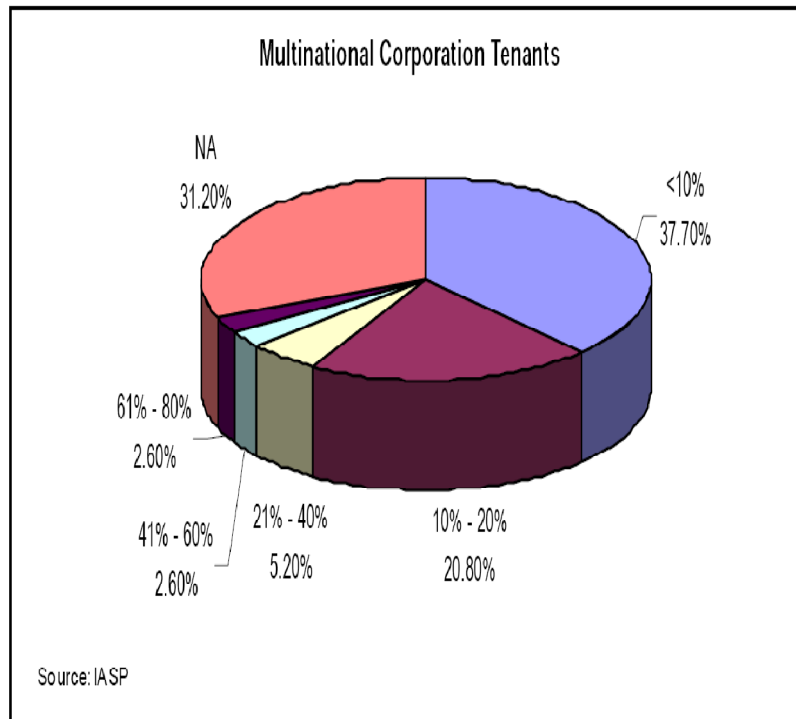
- ☐ In 37.7% of STPs, the number of multinational tenants represents less that 10% of all tenants.

- ☐ In 20.8% of STPs, the number of multinational tenants represents 10% to 20% of all tenants, etc.

Technologicky orientované firmy

Tenants technology ownership

Source: IASP
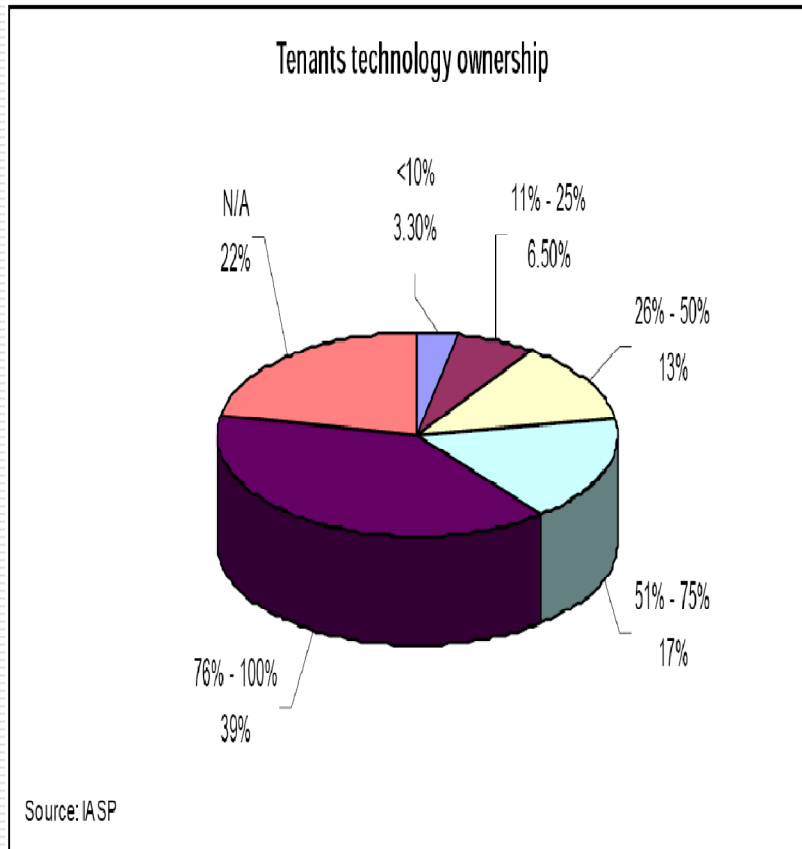
- ☐ In 39% of STPs, the tenants selling their own technology products/services represent 76% to 100% of all companies located in the Park, etc.

Tvorba nových pracovných miest v VTP

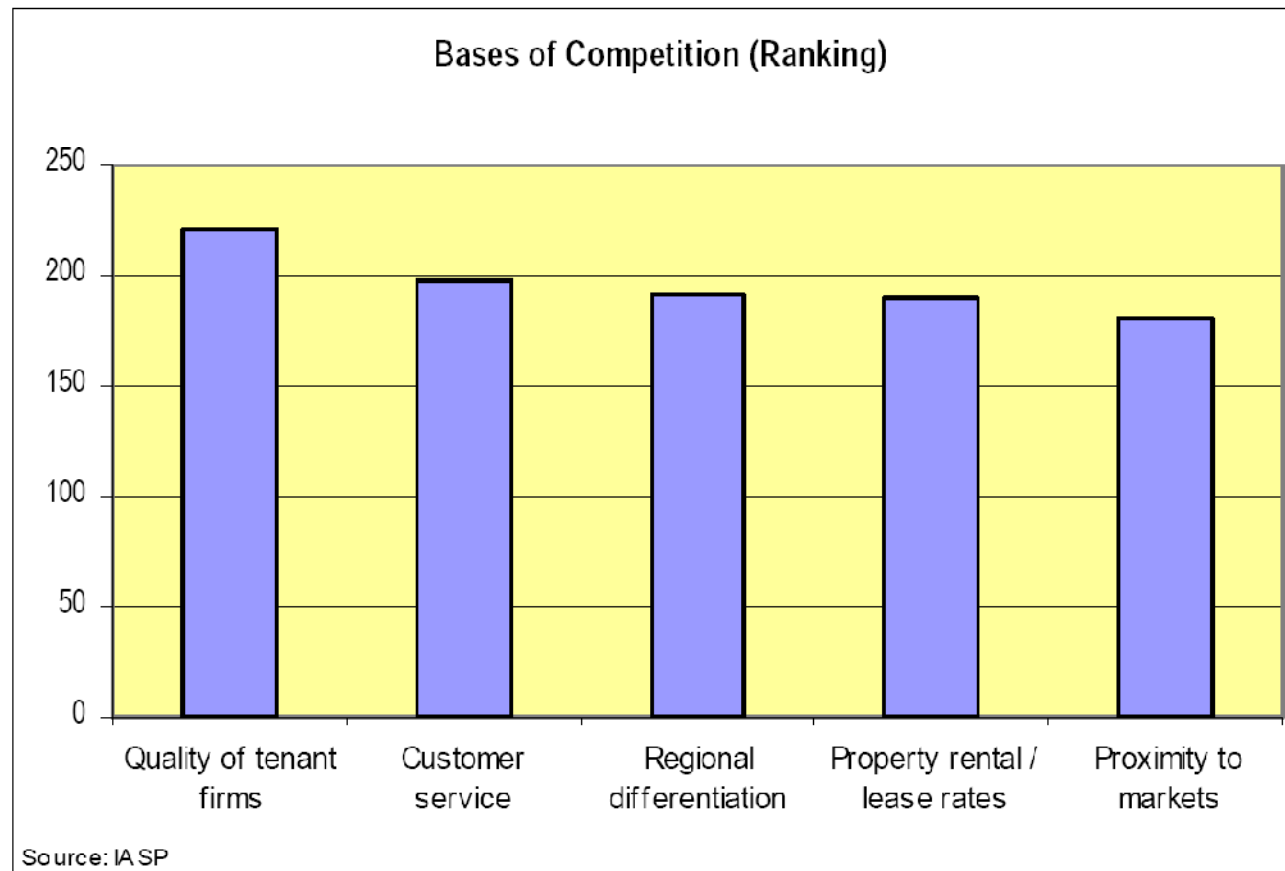Parks' population (total employees)
(Europe)

N/A 12%
< 300 19%
> 3,000 12%
300 - 800 18%
1,501 - 3,000 16%
800 - 1,500 23%

Source: IASP

☐ In Europe 23% of STPs have a population between 800 and 1,500 people, and 12% already have over 3,000 people.

Faktory úspechu a obmedzenia

Rank - Park Success: Constraints

Lack of institutional support	128
Slow property take-up	129
Lack of University collaborat.	135
Lack of trade / industry sup.	139
Government regulations	147
Slow tenant growth	149
Lack of public sector support	159
Lack of financial resources	180

Source: IASP
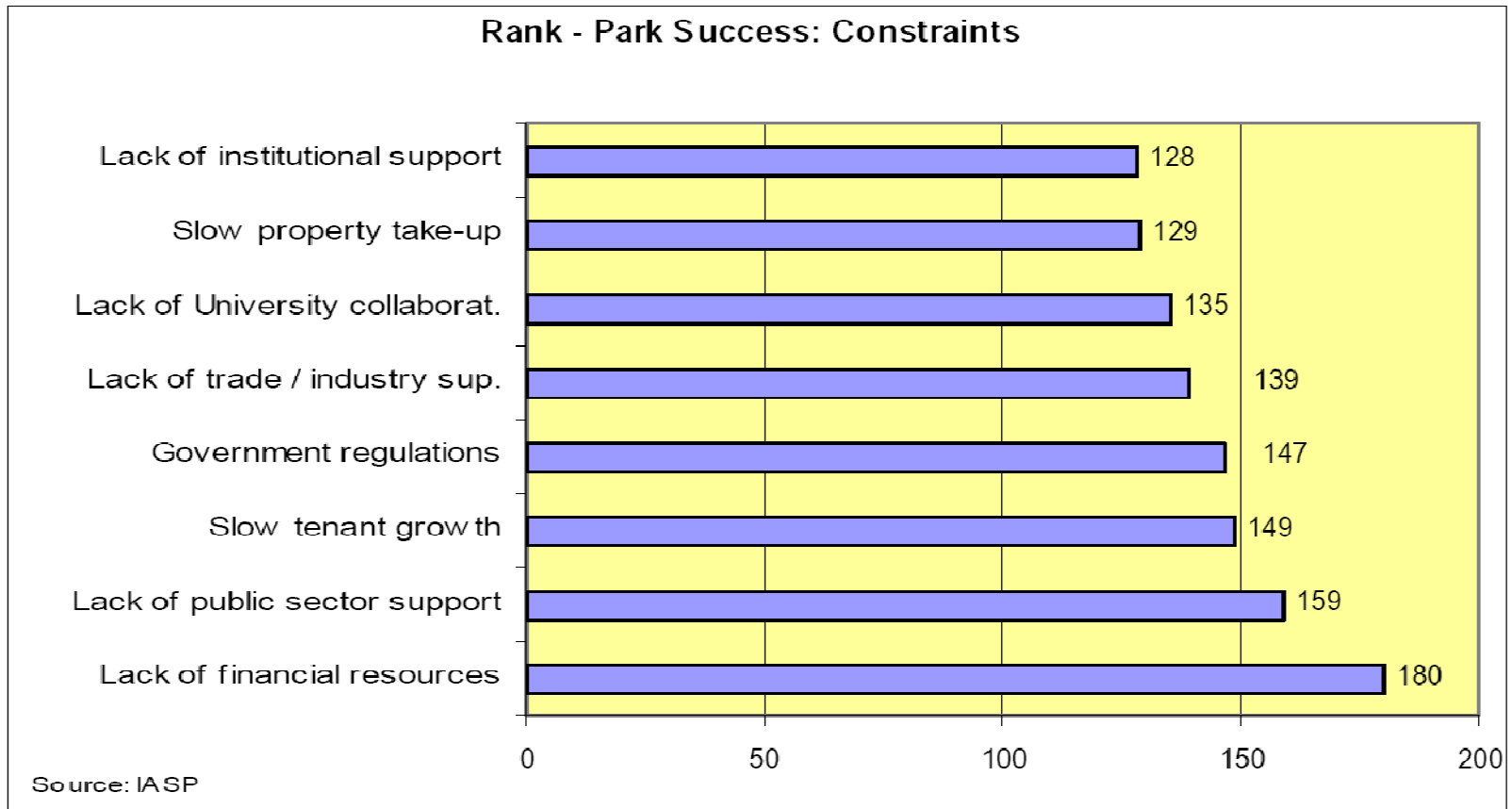
Faktory konkurencieschopnosti VTP

Čo si žiada VTP

- Develop targeted **partnership** and efficient interregional **cooperation**
- Accelerate **strategy** building
- Creating **Alliances**
- Getting better international visibility (incl. partner for IASP, peer reviews)

Enhance the main multiplier effects of STPs entrepreneurship, technology transfer, new jobs creation, foreign investment attraction, generation of synergies, creation of knowledge-based companies, attracting skilled talent...)

Thank you for your attention

- **Ing. Peter Ťapák**

- For more information, you can contact me at:

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- E-mail: Peter.Tapak@vucke.sk