

OECD Cluster Focus Group Workshop 'Do Clusters Matter in Innovation Policy?'

8-9 May 2000, Utrecht NL

'A First Sketch of the Swiss Construction Cluster'

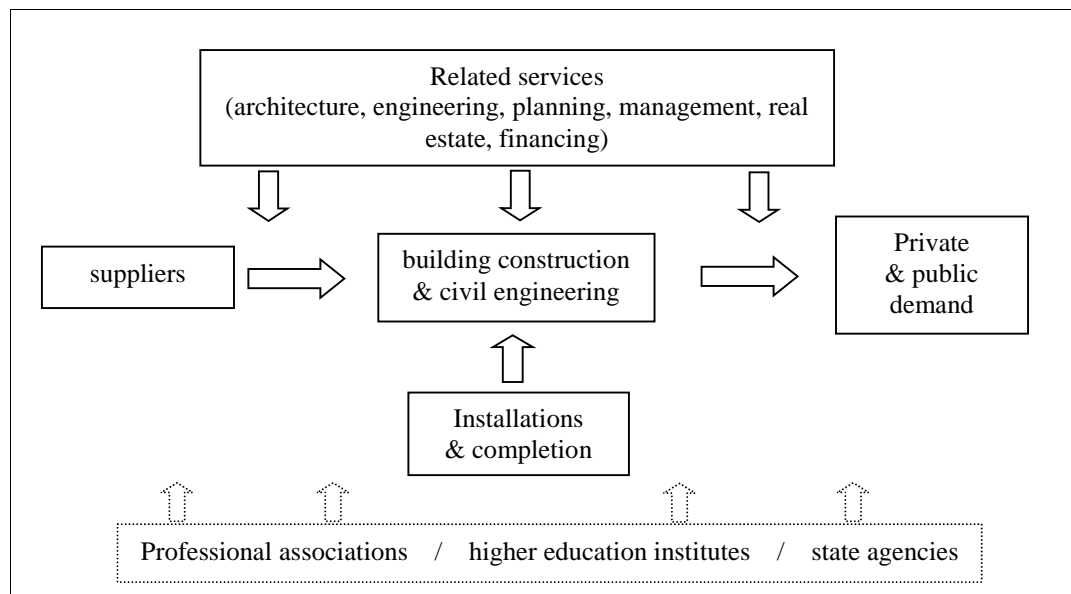
Outline of Presentation by Patick Vock, 28 April 2000

1. Goal, Data and Method

The goal of the exercise – of which the results are presented here – was to establish a sound basis to formulate issues and questions for a case study¹. The method was to gather and exploit existing and relevant materials of different sources and to combine it with some expert interviews.

2. Cluster identification

The construction cluster is a mature business and thus can be relatively clearly defined. It's core business is building construction and civil engineering with well known products for private and public demand. It is complemented by installations and completion work. Suppliers deliver the necessary materials and machines. The whole process is supported in the various stages by related services such as architecture, engineering, planning, management, real estate and financing (see graph).



¹ The same exercise has been done for the Swiss Agro-Food, ICT and Construction cluster. A report will be available, in German.

3. Economic profile

The Swiss construction cluster produces a value added of around 6% of national GDP and employs around 360'000 people. The core business is dominated by SME's with a domestic orientation. Due to fierce competition and restructuring some businesses have been merged to form somewhat larger groups. Among suppliers some are quite big and internationally oriented.

4. Knowledge generation and transfer

Private applied R&D can to some extent be found with suppliers and with completion work. Most important for basic and applied research relevant for the construction cluster are the Federal Institutes of Technology (especially the ETHZ). For applied research the funding organisation CTI (Commission for Technology and Innovation) is important, since it co-sponsors joint industry-academia-projects. Of growing importance in applied research and (further and professional) education are the newly upgraded specialised colleges. Professional associations also play a crucial role in further and professional education.

5. Innovation potential

According to a CIS-like innovation survey the sectors of the Swiss construction cluster show a low to average innovativeness compared to the Swiss average. Innovation impulses either stem from competition and restructuring or from state regulation (energy, environment) or initiatives. Thus product innovations have to reconcile ecological and economical criteria at the same time. Projects aimed at process and organisational innovations tend to overspan traditionally separated segments of the value chain and incorporate diverse actors (firms, professional associations, higher education institutes, state agencies).