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Regions of Knowledge
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REG CON
"Support action for innovation driven clusters in construction.
Regional approach, multi-stakeholder engagement and cross regional co-operation"

Deliverable 1.2(c) National field survey findings report - Spain

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The questionnaire was first adapted to the requirements of the regional field survey activities (especially chapter VI) and then translated into Spanish. The cover letter was adapted to provide some information about the Innovation Forum for the Industrialization of the Construction Sector which is being promoted by the Basque Government since 2007. More than 30 organisations, ACCIONA Infraestructuras and LABEIN Tecnalia among others, have been involved in discussing the vision, mission and strategic activity areas for the Innovation Forum during 2008, which is laying the ground for the creation of the Construction Cluster in the region.

One of the main objectives of the survey in the Basque Country Region was to identify some other companies and organisations interested in joining the initiative, as well as collecting some useful information for the future of the Innovation Forum. That is why the survey was conducted among companies and other organisation not previously involved in the initiative.

In a first stage, the questionnaire, together with the cover letter was submitted to around 100 companies by email. 6 respondents answered to the questionnaire after this first contact. In a second step, those companies who did not answered to the email and 768 more, were contacted for a phone survey. After this second stage, 71 are the total answers obtained.

The most important conclusions are highlighted below, following mainly the graphs suggested by the Task coordinator for the "chick" regions.

"Technologies for healthy, safe, accessible and stimulating indoor environments" is considered one of the most important R&D areas for the future of the construction sector in the region by a great majority of the respondents (70,4%), closely followed by "reduction of environmental and man-made impact of built environment and cities" (69%). However, just the 21.4% of the respondents selected the latter one as being one of the most important areas for their organisations. The third most popular R&D area for the future of the region, "new technologies, concepts and high-tech materials for efficient and clean buildings" (54.9%) happens to be one of the most important ones for the 63.4% respondent organisations, so the most popular one.

Areas	Most important for the region	Most important for the organization
Technologies for healthy, safe, accessible and stimulating indoor environments	70,4%	28,2%
Innovative use of underground space	53,5%	31,0%
New technologies, concepts and high-tech materials for efficient and clean buildings	54,9%	63,4%
Reduction of environmental and man-made impact of built environment and cities	69,0%	21,1%
Sustainable management of transport and utilities networks	40,8%	39,4%
Maintaining living cultural heritage	50,7%	31,0%
Improve safety and security within the construction sector	43,7%	45,1%
Developing new integrated processes for the construction sector (like interoperability, digital models, knowledge sharing, intelligent constructions etc.)	25,4%	40,8%
High added value construction materials (improving materials features and materials production process)	32,4%	42,3%
No response	---	2,8%

Figure 1: The future of the construction sector

Concerning the objectives of the cluster, 69% of the respondents considered the employment growth as being one of the objectives followed by the reduction of production costs. On the other side, increasing exports and commercializing academic research are the options less considered to be the most important objectives for the regional clusters.

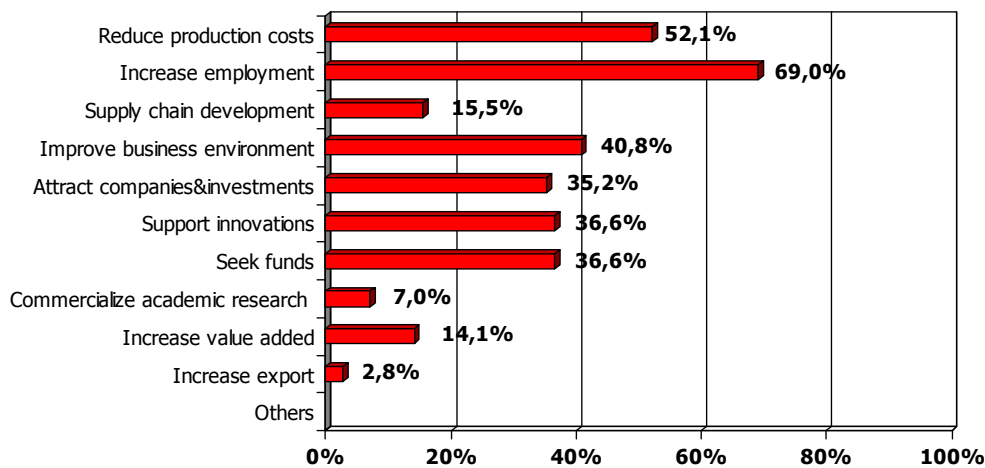


Figure 2: Cluster objectives

25 companies, out of the 71 surveyed are interested in participating in the Construction Cluster of the Basque Country Region. So if they join the Innovation Forum initiative which is under operation since 2007, they would make around 55 organisations.

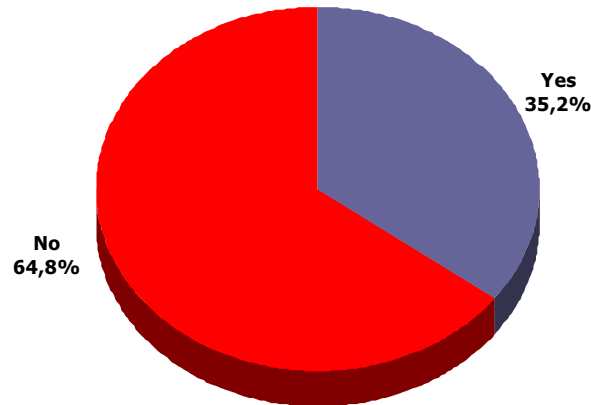


Figure 3: Interest in participating in the cluster

Time and know-how are the contribution that the companies would make to participate in such an initiative, followed by offering their contacts. It is mention worthy that just the 28% of the respondents would provide information, being one of the options gathering fewest answer, together with financing (28%) and human resources (24%).

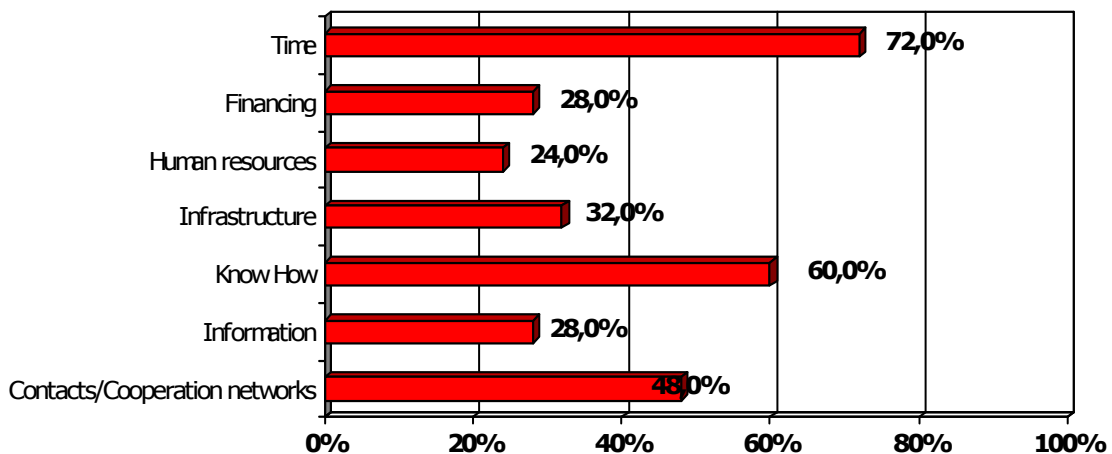


Figure 4: Outlays

Among the group of activities that the respondents would be most interested in participating in, "network development and research" stands out as the most interesting one for 84% of the respondents.

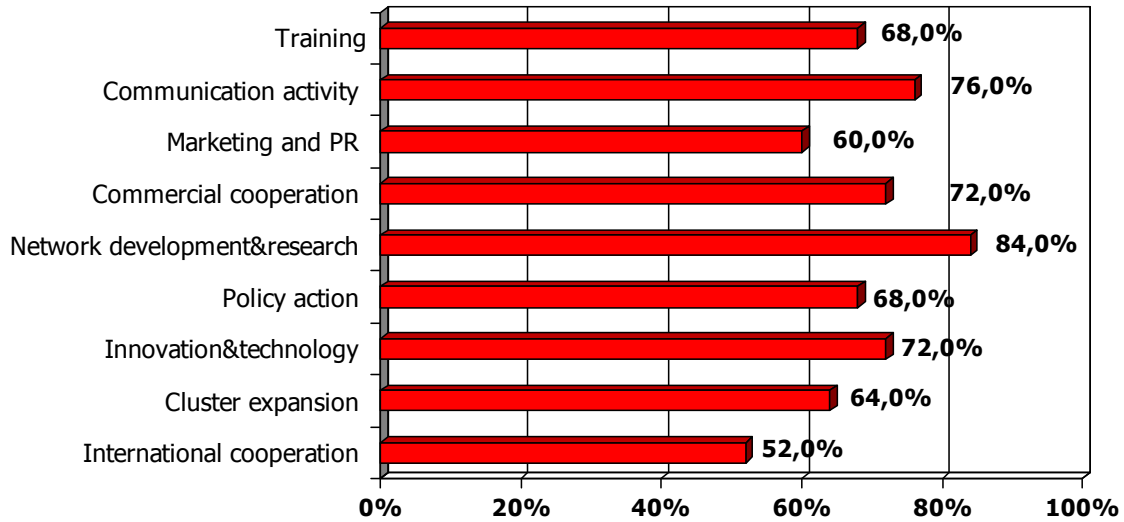


Figure 5: Most interesting cluster activities

The three broad organisation and management models obtained a very similar score, but the option of "being one of the cluster members the responsible for the cluster" slightly stands out.

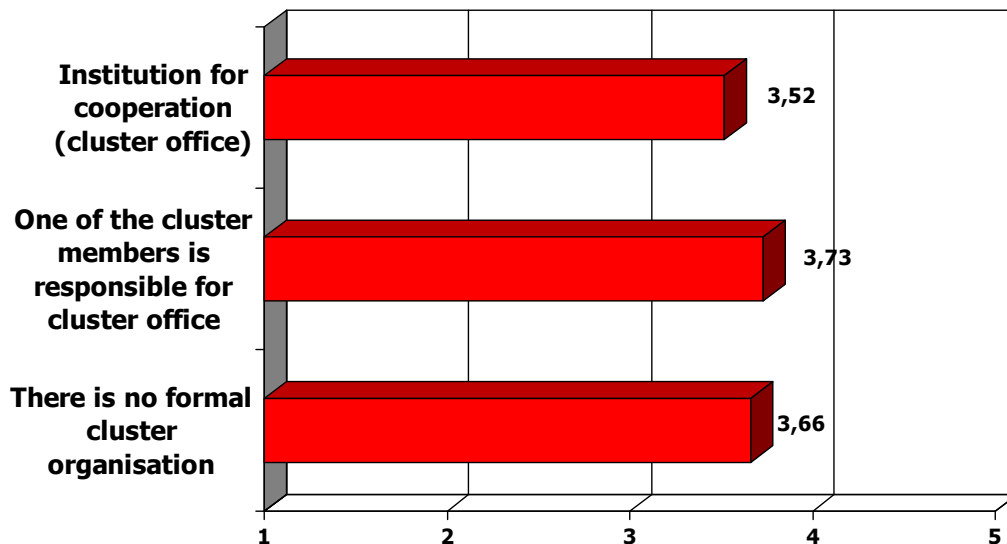


Figure 6: Cluster organisation and management model

All the options under each suggested model obtained a very similar score as well, as it can be observed in the following figures 7 to 9.

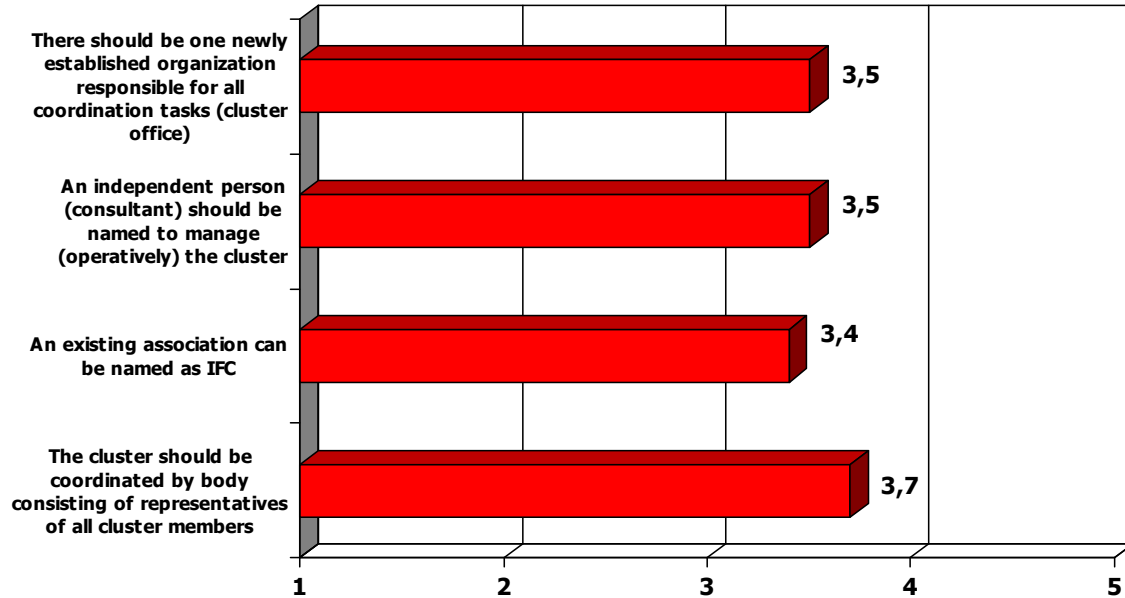


Figure 7: Cluster office

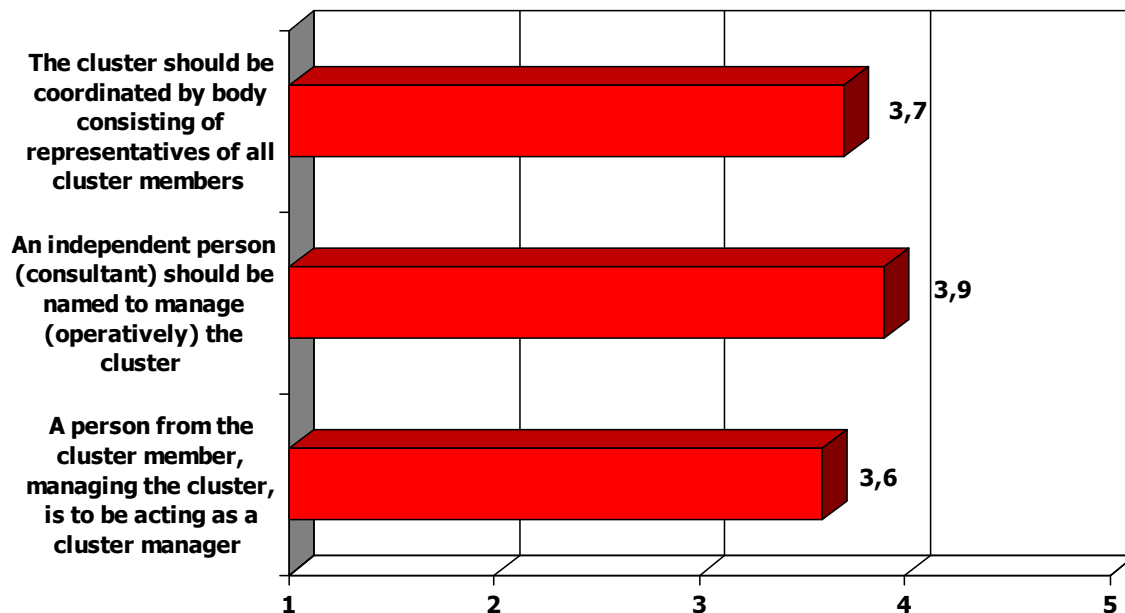


Figure 8: One of the members as responsible

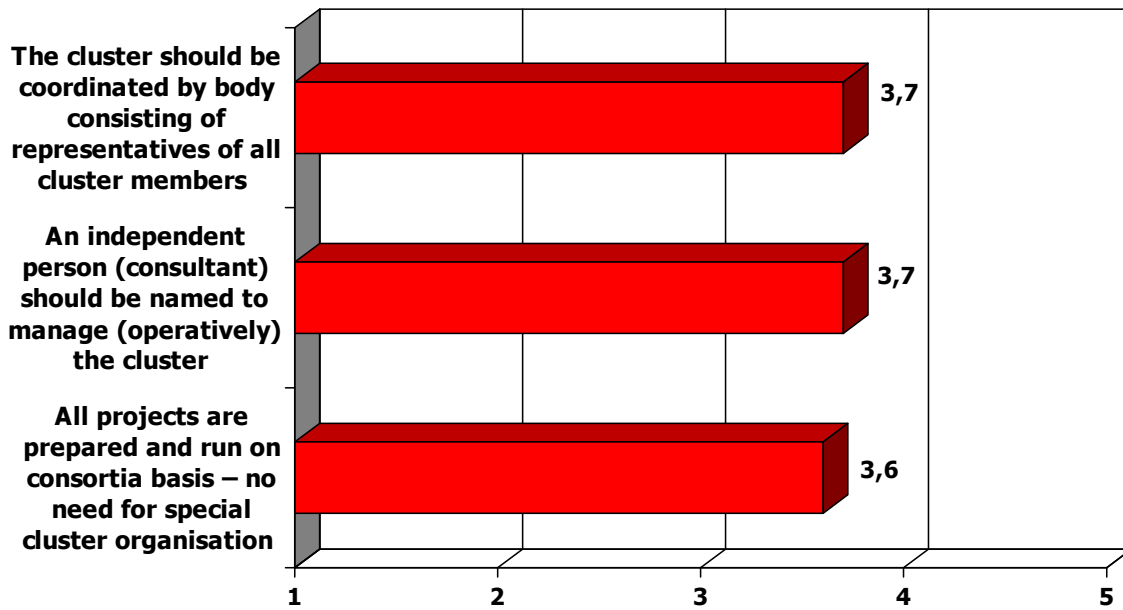


Figure 9: No formal organisation

Funds from national and local public sources are considered to be one of the most important funding sources, followed by European research funds. According to the respondents, other type of sources just mean the 27.3% of total cluster funding.

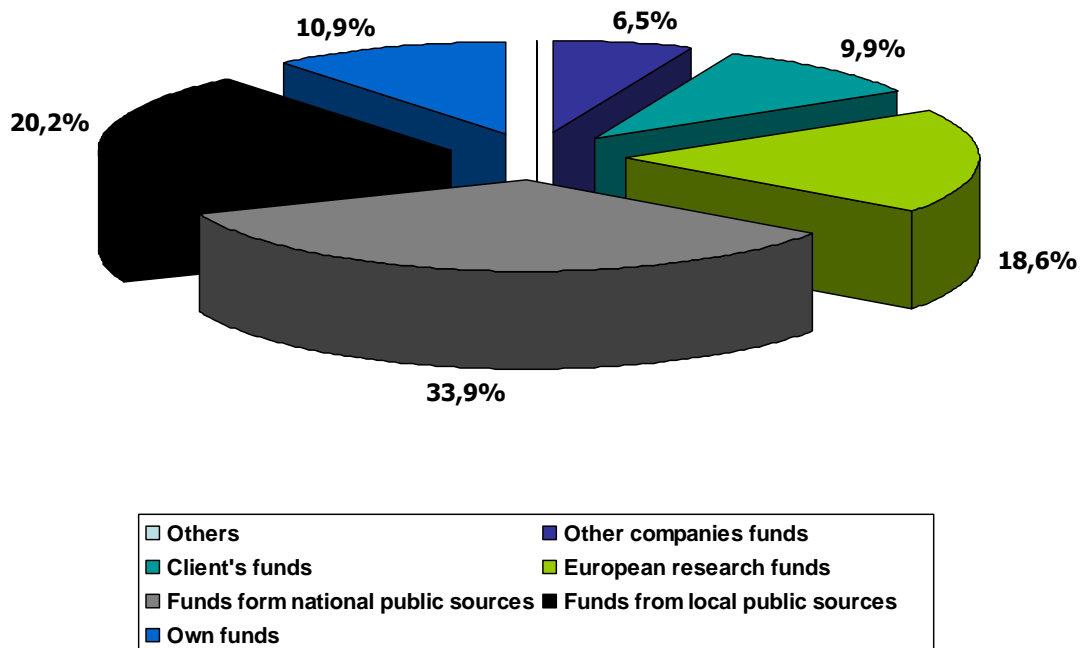


Figure 10: Cluster funding

As observed in figures 11 and 12, lack of time for cluster activities and lack of funds are by far the key factors hampering the effectiveness of a cluster initiative according to the respondents, while Human Resources, Communication and Access to funds are the critical success factors.

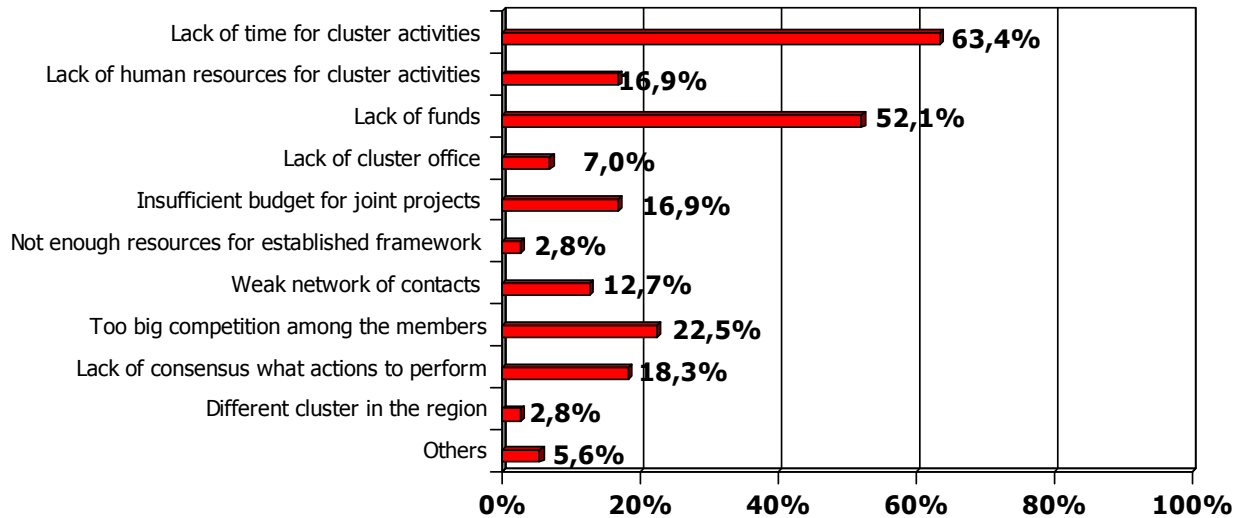


Figure 11: Factors hampering the cluster effectiveness

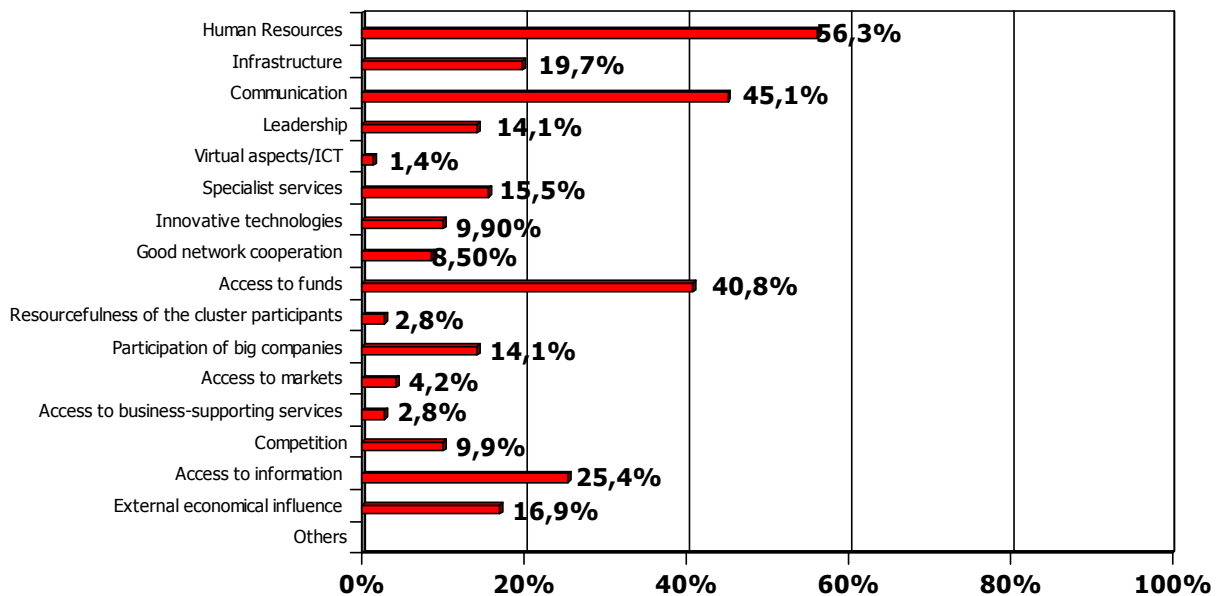


Figure 12: Critical success factors

Summary – recommendations for communication workshops

Around 30 organisations have been involved in the creation of the Innovation Forum for the Construction sector in the Basque Country region and have participated in the workshops organised so far in 2008. The next communication workshop will take place in 2009 and will be an important milestone for the construction agents to assume the leadership of the Innovation Forum and also to lay the ground for the Innovation Forum to progressively start operating as other clusters in the region do. The invitation to the workshop should be extended to the 25 surveyed companies that are interested in joining the initiative. It could also be the official presentation of the Innovation Forum or the cluster to the society.