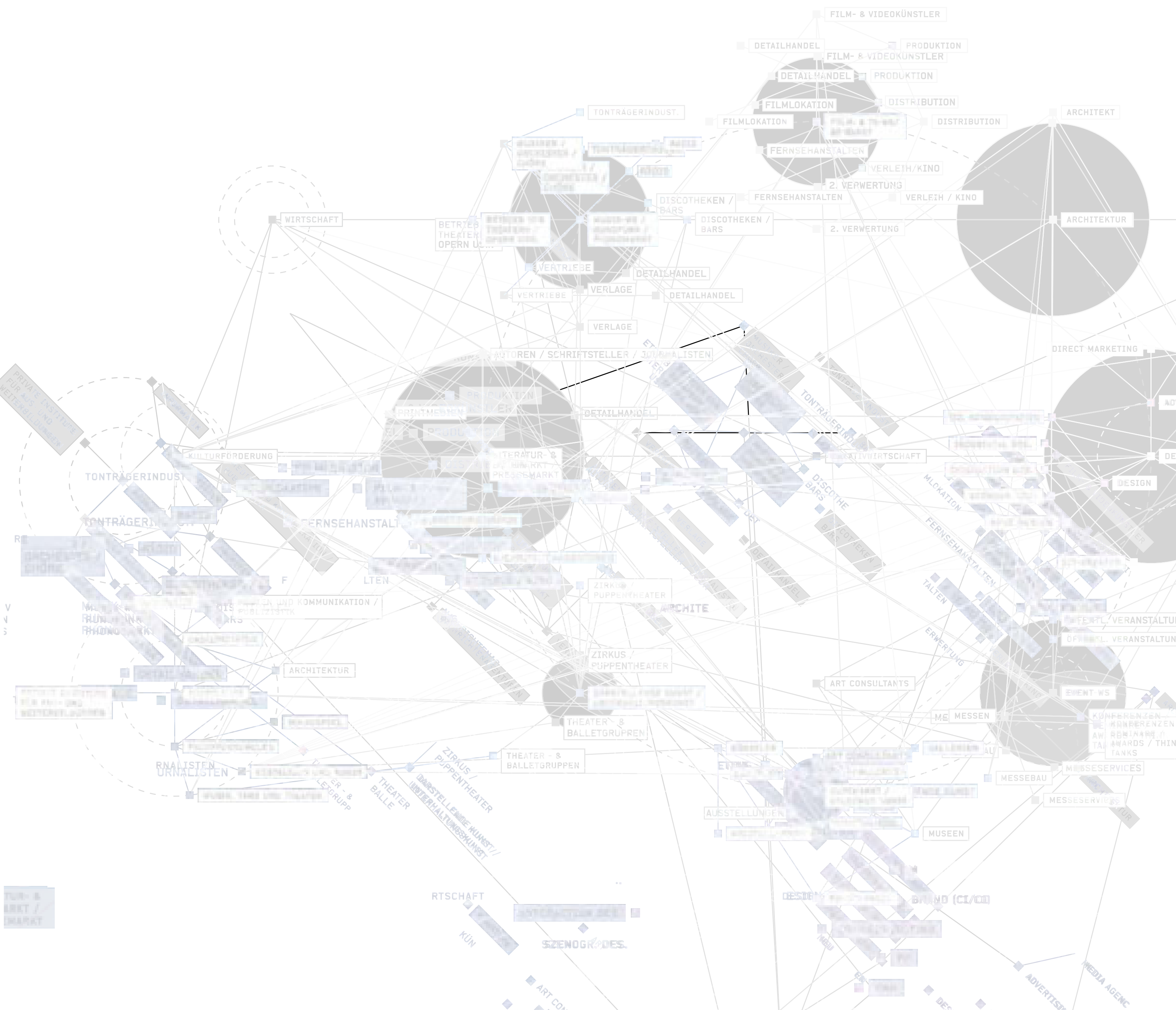
Zurich's Creative Industries

Synthesis Report

Thom Held/Christian Kruse and Michael Söndermann/Christoph Weckerle

On Behalf of the Economic Development Departments of the Canton and City of Zurich

June 2005



Zurich's Creative Industries
Synthesis Report

Thom Held/Christian Kruse and Michael Söndermann/Christoph Weckerle

On Behalf of the Economic Development Departments of the Canton and City of Zurich

June 2005

Imprint

Zurich's Creative Industries - Synthesis Report

Thom Held / Christian Kruse and Michael Söndermann / Christoph Weckerle

On Behalf of the:

Office for Economy and Labour of the Canton of Zurich
Economic Development

City of Zurich
Economic Development

Project Partner:

hgk Z
School of Art and Design Zurich
University of Applied Sciences and Arts Zurich

Financial support received from:

Zurich Cantonal Bank

Translated from the German by Michelle Durham

The following studies, on which this report is based, can be downloaded from www.kulturwirtschaft.ch:
Studie I: Kreativwirtschaft Zürich – Der privatwirtschaftliche Teil des kulturellen Sektors im Kanton Zürich
Studie II: Kreativwirtschaft Zürich – Raum für das Kreative. Konzeptionelle Ansätze für den Aufbau eines Clusters Kreativwirtschaft Zürich

For further information about content, please consult:
Studie I: michael@soendermann.de, christoph.weckerle@hgkz.ch
Studie II: held.th@heldpn.ch, kruse@isb.unizh.ch

«Zurich's Creative Industries» can also be downloaded from www.kulturwirtschaft.ch

Initiator's Foreword

Unlike elsewhere in the world, there has been little discussion here in Switzerland about creative industries and their relevance. This report signals a change. The Offices for Economic Development in the Canton and City of Zurich are getting the ball rolling by asking some pertinent questions: What is meant by «creative industries»? What role does this complex of branches play in Zurich's location? And what can be done – in the sense of cluster development - to foster them?

Those enterprises which come under the umbrella of creative industries all engage, on a commercial basis, in art-related and creative production, its facilitation, as well as the medial distribution of its related goods and/or services. Its range includes everything from the music, books, art, design, architecture and film industries to the ensemble of a performing arts troupe. This creative sector produces high-quality, innovative jobs, and through the use of its network of creative institutions, businesses and private individuals, forms an important element of structural change in the evolvement of a modern knowledge-based economy. Creative industries are, by nature, locally-tied to their surroundings – often even downright «small-scale urban». And yet, they often have global links which provide them, at least potentially, with an interesting supply of export goods. Creative industries need «raw materials» and Zurich certainly provides them in great quantities with its highly specialized, open and tolerant community; strong financial power; service-oriented industries; as well as its cosmopolitan make-up and high quality of life – it certainly offers a potential not to be passed up.

Zurich's creative industries display a sizable labour force and turnover potential. The following analysis reveals an economic sector comprised of independently functioning markets which forms close ties, as well, to other branches like the tourism and information and communication technology sectors (where it performs a strategic role as «content carrier»), as well as the financial sector.

Yet despite these positive findings, the need for action is clearly imminent. Leading market participants in creative industries find Zurich's location increasingly lacking in international recognition – despite evidence of a growing demand. Focused measures are a must if any further loss of ground is to be avoided and creative industries are to be better utilized, their network improved and their promising potential more effectively developed.

Our objectives in this report are twofold: first, we would like to set things in motion by discussing, here at Zurich's location, the great potential found in creative industries. We also seek to motivate representatives from economics, politics and administration, to take on the challenge of collectively cultivating and strengthening these trend-setting industries, since it is the so-called «creative class» who are always searching globally for a good location to reside and develop new ideas. Zurich should be the first address for the creative and culturally active.

We would like to thank the authors of this report for their outstanding engagement, as well as the branch representatives whose contributions to the studies on which this report is based, made for a very fruitful collaboration. And lastly, we are ingratiated to Zurich Cantonal Bank, for its invaluable support.

Anita Martinecz
The Canton of Zurich, Economic Development

Robert M. Blancpain
The City of Zurich, Economic Development

Index

Summary

The following synthesis report on Zurich's creative industries brings together the findings from an empirical-quantitative study as well as an interactive-qualitative study*. It takes a comparative as well as comprehensive look at the economic data and knowledge of the processes in relationship to those people standing behind them and their projections for the future of this industry.

Those enterprises which come under the umbrella of creative industries all engage, on a commercial basis, in art-related and creative production, its facilitation and/or the medial distribution of its related goods and services. From a selection of culturally-related industry branches, the following have been defined here as comprising *the creative industries in a narrower sense: the music industry, literature and book market, art market, film industry, performing and entertainment arts, design industry and architecture. This core group is extended through the creative industries in a broader sense*. Included are the related markets – e.g., advertising industry – as well as selected economic sectors of the media branch, reflecting creative industries' state of constant flux as well as strong interlocking with technological-medial branches.

The Most Significant Empirical-Quantitative Findings

In 2001, there were approximately 8,000 (City: 4,000) operationally-active creative enterprises in Canton Zurich's (Zurich City's) creative industries ranging from the music, books, art, design and architecture industries to the film and performing arts industries. Within these creative branches, or sub-segments, most of the approximately 36,700 (City: 22,400) people found viable *jobs*. Calculated at a *full-time equivalent*, this comes to 30,700 (City: 19,000) jobs, reaching a total turnover of approximately CHF 8.3 bn. (CHF 5.1 bn.**). According to a conservative estimate, that's a *gross value added* of at least CHF 3.3 bn. (CHF 2 bn.) for Canton Zurich's (Zurich City's) creative industries. This reflects a relative contribution of 3.7% (4.3%) to the Gross Domestic Product (GDP) in Canton Zurich (Zurich City).

Looking solely at these base values, Canton Zurich's creative industries already exhibit a *considerable labour force and turnover potential*. Analysis reveals an economic sector comprised of independently functioning markets, the strongest subsegment being the design and advertising industry, with approximately CHF 2.8 bn., followed by the book, literature and press markets with approximately CHF 1.8 bn. and the architecture industry with close to CHF 1.5 bn. turnover.

When comparing Zurich with other metropolitan regions of Europe, similar numbers can also be seen in part. In 2001, employees in the creative industries made up approximately 4.9 % of the total Canton Zurich labour force, while in Berlin in 2002, it was estimated at roughly 4.5 %, and in Vienna, approximately 4.3 %.

When comparing those 36,700 employed in creative industries in 2001 with the 47,000 employees in the banking institute – Zurich business location's key branch – the significant relative importance of creative industries becomes evident. In terms of comparison, the official employment statistics show mechanical engineering with just a marginal 16,500 employment figure.

Moreover, a comparison with the financial industry points to an important structural characteristic of creative industries: for the 47,000 employees in the banking institute there were approximately 750 enterprises, while in the creative industries there were 8,000 enterprises for 36,700 employees. In other words, creative industries are mainly composed of small and smallest business enterprises.

* Both studies (in German) can be downloaded under www.kulturwirtschaft.ch.

* *1 EUR ≃ 1.5 CHF

The Most Significant Interactive-Qualitative Findings

The creative industry is understood here as a *functional process* and viewed from within the context of current development in *urban economies*. For this purpose, creative industry market participants (organisations as well as individuals) and their interchange have been examined. What has emerged, among other things, is a *relational landscape* of the individual sub-segments of the creative industries, granting novel insights into their *structures* as well as the geography of their *self-perception*. This approach has enabled key processes to be identified, conjectures reached and the need for action in the continued successful development of Zurich's creative industries to be expressed.

If the innovation potential of creative industries is to be turned into a sustainable value, *more room must be made – both in the literal and abstract sense of the word:*

- For optimal development, creative industries require *their own space based on the elements of proximity and cooperation,* so that they may collaborate actively and strategically in the clustering process of their market participants.
- Creative industries require the appropriate *city spaces and facilities* which are reflective of their character: (cultural) innovations are seldom rooted in upscale quarters of the city offering optimal profit, but found instead in areas where flexible, as well as spontaneous, usage is possible and small business owners can manage the rent.
- Creative industries require enough (and frequently new) *areas of identification*. This calls for a formation of new «public destinations» – along side those already existing – which seek to foster a creative Zurich.
- Since market participants increasingly move between *the public, private and intermediary sectors,* (better) use should be made of *the capillary interrelationships among these three sectors*, and in turn, the corresponding structures, platforms and offers be developed.

In conclusion:

Zurich – unlike most other locations in Switzerland – offers an opportunity to view creative industries as a part of a larger economic strategy, enabling a more decisive use of its potential. Both the quantitative and the qualitative studies substantiate this.

However, Zurich still has some hills to climb – at least this is what market participants observe, viewing things from inside the process. Branch industries, despite how heterogeneous by definition, need to improve their networking among themselves. While market participants interact with one another within the creative industries, they often lack a common platform and common interests, and consequently, the commonly realized goals. Zurich's creative industries are also primarily a part of the domestic sector at present, and thereby weakly developed in some areas, undercapitalized and lacking in a strong international network, leading to losses in value added potential and dynamic. To add to this, creative industries in Zurich (and Switzerland) have not yet managed to make use of the significant demand potential of large Swiss and international customers.

These studies supply the necessary ground material needed to commence overdue debates in the areas of economics, administration and politics.

[1] Zurich's Creative Industries
Function, Definition, Classification

[1.1] Hypothesis and Definition

Background and Hypothesis

The empirical-quantitative study shows many promising results: Zurich's creative industries exhibit *a considerable turnover and labour force potential and an above-average growth rate*. On the downside, they seem to be *losing their relative importance in the international arena due to a lack of awareness*. Even in Switzerland itself, little mention is made of the possible potential this complex of independently functioning industries could provide as a content carrier to other service branches and to the export industry. Underestimated aspects at Zurich's location include the function of creative industries as a national centre, the networking and interdependency between the individual industries, as well as between the creative industries and the overall economy.

If the significant potential creative industries display within Zurich's urban economy is to be better positioned and made into sustainable values, new strategy approaches must be formed.

Defining Creative Industries – A Three-Sector Model

The coined term «Kultur/kreativ + Wirtschaft» (in Great Britain, the «cultural/creative industries») is comparatively new to Swiss ears, while in Great Britain, as well as in other neighbouring countries like France (industries culturelles), Germany (Kulturwirtschaft), Austria (Kreativwirtschaft), Spain (industrias de la cultura) and Canada (arts and culture industries), it has already been common knowledge for years.

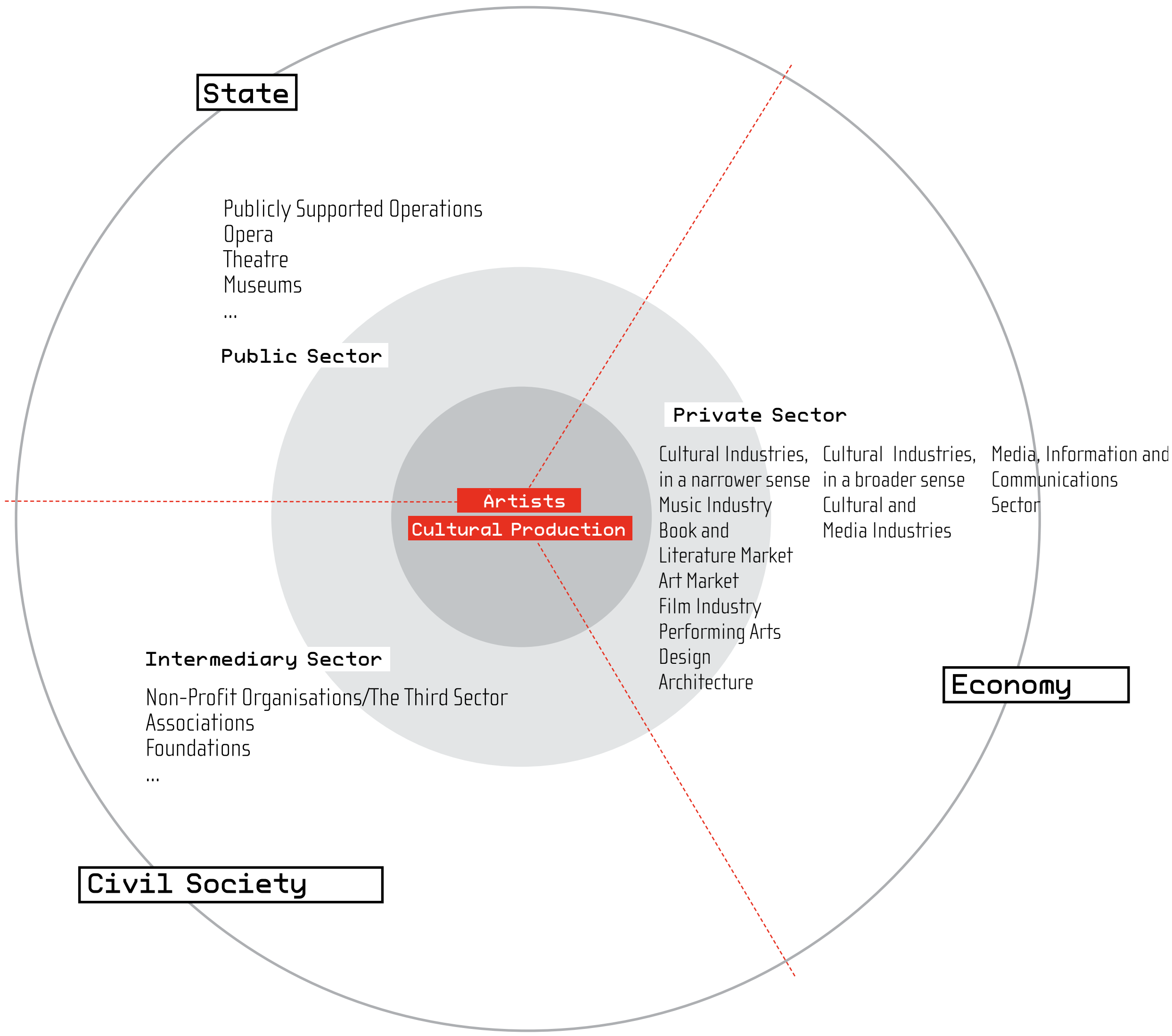
The creative industry centres around creative operations within a private industry sector. It is these enterprises which engage on a commericial basis in artistic/creative production, its facilitation and/or the medial distribution of its corresponding goods and services.

When taking this private industry (creative industries) segment into account in viewing the overall cultural sector, a three-part model arises comprised of *three sectors: the state, the civil society and the economy*. In the public sector, the state promotes art and culture through its legal instruments, guaranteeing primary cultural needs. In the intermediary sector, non-profit associations and organisations offer further cultural services. And in the private sector, the private industry-oriented creative industries define themselves in accordance with an independent branch logic.

This *three-sector model* (see Illustration 1) is currently a topic of discussion in various federally structured European countries. Analysis of artist biographies hints as well to the gaining significance of interactive ties among the above mentioned three sectors. Due to shrinking public financial support, very few artists are exclusively active in the public sector, with the trend moving toward interaction in and between all three sectors.

These reciprocal relationships also show up at the structural level. The book trade augments itself in several respects through the librarianship; music schools use specialized music dealers; galleries are closely linked to art associations and art museums; and publicly-financed orchestras, public-legal broadcasting, private concert entities and the phono industry are also forming similarly symbiotic relationships. This trend toward hybrid structures is echoed in the interviews (s. Studie II) with creative industry representatives: artists and creative market participants, alike, move with pleasure and purpose among the various branches and sectors. It is be-

Illustration 1: A Three-Sector Model. An understanding of the capillary interrelationships between the three sectors is essential to a future-oriented policy formation. (Illustration from: Kulturwirtschaft Schweiz, cover page)



coming increasingly difficult to classify them into any distinct groups.

[1.2] The Role of Zurich's Creative Industries in the Urban Economy

Zurich's Creative Industries in a Knowledge-Based Society and Economy: Relational Assets of a Region, Concept of Embedding

Since the 90ies, knowledge has come to play an increasingly centralized role in urban and metropolitan economies. For this reason, knowledge-intensive services take some of the responsibility for the transformation process of functional economic areas. According to US scientist Richard Florida, a knowledge-based economy is primarily surrounded by a net of creative institutions, enterprises and individuals, initiating and implementing technological, economical, societal and cultural innovations. Creative industries, as defined, are a part of such creative networks, fulfilling an important function in the successful development of urban and metropolitan economic areas.

It is not surprising that creative industries have established themselves as an *element in the innovation or economic policy* of many European countries. European cities and regions have also been launching related activities in recent years.

Particularly from a regional economic perspective, creative industries play a decisive role in the structural change of urban or metropolitan economies. They are closely linked to increased ability to compete in the form of increased entrepreneurship, innovation capability and value added systems (s. also New Federal Regional Policy).

Internationally, Zurich's economic area belongs to the few economically important locations to have developed practically no strategic approaches up to now in the area of creative industries. If Zurich City Region seeks to develop such strategies, it first needs to gain the necessary knowledge of its *territorial specificities*, i.e., the existing regional characteristics, perhaps even idiosyncrasies. This would include *every potential*, *every ability, every form of human capital and each network which is specific to the region* – elements definable as the relational assets of an economic area. These are characteristics which are difficult to mimic, imitate, i.e., transfer to any another location. They form a knowledge base which provides a resource for strengthening competitive ability, which in turn can then be put to strategic use. Economic policy measures would then need to be fixed in order to enable the establishment and development of the relational assets of the respective regions, providing the location with strong relative significance among global competition.

This is critical because a location can still lose its standing despite its regionally-specific, unique profile – for instance, if another location is better able to position its potential. Such a development could critically effect Zurich's location since not only the creative industries would suffer in terms of ranking / significance, but also the related network branches which could then lose one of the most important transformers of the innovative processes. For this reason, this complex of creative industry branches is critical to Zurich's location.

[1.3] Classification of Creative Industries– Statistical Boundaries and Relational Landscape

Statistical Boundaries

Creative industries have not yet found their way into any classification of economic sectors. What's needed is a reclassification which groups individual branches into sub-segments by combining a thematically fitting catalogue (what belongs to a future-oriented definition of creative industries?) with the current empirical-quantitative classification (what relevant data has already been documented?).

From a selection of culturally-related industry branches, the following have been defined as *belonging to the creative industries in a narrower sense: the music industry, literature and book market, art market, film industry, performing arts, design industry and architecture*. This core group is extended through *the creative industries in a broader sense*. For example, the music industry is unthinkable without the phono industry. And the same can be said for the film industry, which is greatly influenced by TV productions and the broadcasting establishment. From an economic point of view, this mutual inter-exchange reflects what's really going on in the branches. Cultural operations, in a broader sense, only generate a portion of these culturally relevant economic activities.

Table 1: Creative Industries Profile, in a Narrower, i.e., in a Broader Sense, based on the Nomenclature of General Activities NOGA. (For detailed methodical derivation s. Studie I)

Creative Industries, in a Narrower Sense		Creative Industries, in a Broader Sense
Music Industry* Branch Descriptions (Selection): Composers and Music Arrangers, Sound Carrier Industry, Music Publishers, Musical Instruments Retail Industry, Music Supplies, Ballet Troupes, Orchestras, Bands, Choirs, Sound Recording Studios . . .	plus	**Phono Industry**
Book and Literature Market* Branch Descriptions (Selection): Writers, Journalists, Press Photographers, Book Retail Industry, Trade Journals, Book Publishing, Libraries and Archives ...	plus	**Press Market**
Art Market* Branch Descriptions (Selection): Visual Arts, Restoration, Retail Art, Museums and Art Exhibitions ...	plus	**Arts and Crafts**
Film Industry / TV Productions* Branch Descriptions (Selection): Film and TV Actors, Film and Video Producers, Film Rentals, and Video Program Providers, Cinema, Broadcasting Services/TV Institutions and related businesses ...	plus	**Audio-Visual Market**
Performing Arts* Branch Descriptions (Selection): Artists, Theatre Troupes, Theatre and Concert Organizers, Opera and Playhouses, Concert Halls and similar establishments, Vaudeville, Cabaret, other cultural offerings (Circus, Puppet Theatre, etc.)...	plus	**Audio-Visual Market**
Design* Branch Descriptions (Selection): Industry Designers, Graphic Designers, Communications Consultants ...	plus	**Advertising**
Architecture* Branch Descriptions (Selection): Architecture, Interior Architecture, Landscape Architecture ...	plus	**Architecture (in a broader sense)**

* Only the private industry sectors portion of the mixed economies or largely public institutions, according to the defintion of creative industries, have been examined. (Section 1.1).

Relational Landscape – Interrelationships

Basing an analysis of political strategy-finding processes on official economic statistics is advantageous for the obvious fact that the data offers credibility. However, the data does not model the functional relationship of the sub-segments within the industry. Creative industry enterprises are often operational in multiple sub-segments, which themselves are functionally interlinked to complex value added chains. Creative industry enterprises describe their branches differently than the statistics on a piece of paper do.

For this reason, the geography of the data (statistics) in this project has been enhanced through a complementary geography of self-perception depicted in the form of a relational landscape. This complementary way of observing is new and forward-thinking for the area of creative industries because the individual methods mutually enhance one another.

The relational landscape presented here (cp. Illustration 2) is the result of an interactive process undertaken with representatives from various sub-segments. Laid out is a matrix of information depicting the structural characterizations of the individual sub-segments and their functionally intertwining patterns. The circles represent the different sub-segments of the creative industries through a superordinated structure and inner differentiation. The size of the circles corresponds to the relational size of the sub-segments on the basis of employment figures. The lines between the individual sub-segments are an incomplete and non-quantitative depiction of the interactions and division of labour links between the different branches. This relational landscape has enabled core activities, strategic assets and central axes of interaction within Zurich's creative industries to be identified and made visible (cp. Section 2.3). This illustration should be useful (as well as expandable) in future research made on value added processes, entrepreneurial and branch-specific developments as well as in discerning future potential.

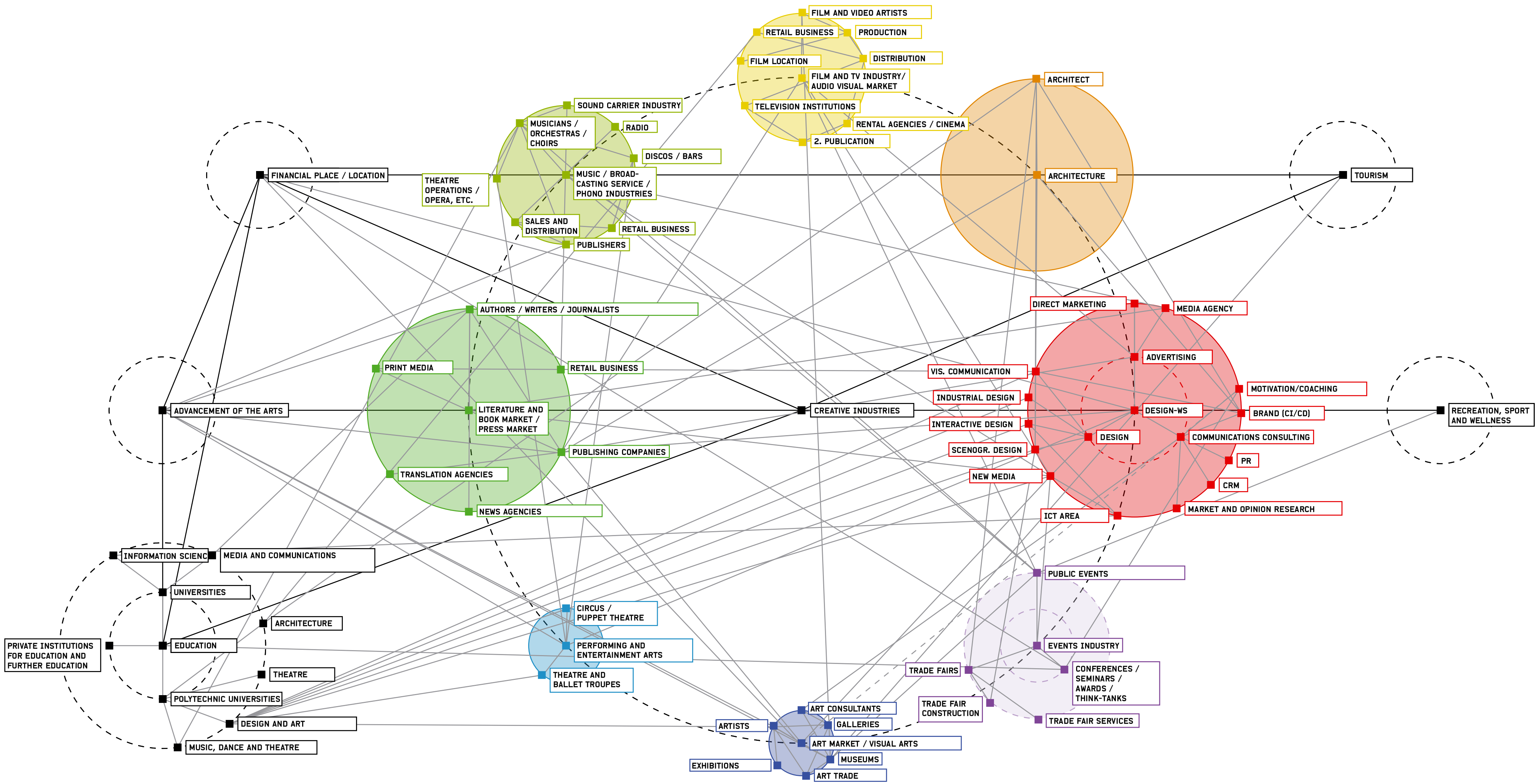


Illustration 2: The Relational Landscape of Zurich's Creative Industries
This illustration was developed in collaboration with selected market participants within the creative industries. The relational landscape is based on the self-perception and correspondingly practical knowledge of the participants. This illustration does not aim to be complete but provides instead an understanding and visualisation of the functional mutual dependency at the various market participant levels. Note: The size of the circle corresponds to the number of employees in the corresponding sub-segments (s. Studie I), with the exception of the «events industry» sub-segment, which was treated as a cross-sectional branch in the empirical analysis, and therefore, has no available employment numbers.

[2] Portraits of Zurich's Creative Industries

Facts and Figures

[2.1] Empirical-Quantitative Portrait

Illustration 3: Benchmark Data in the Creative Industries, 2001

	Zurich City	Canton Zurich	Aggregate Switzerland
Number of **Operations**	3 961	8 013	33 453
Labour Force Full/Part Time	22 412	36 744	141 437
Labour Force Full-time Equivalent	18 928	30 686	117 536
Turnover in CHF m**	5 054	8 285	31 892
Value Added* in CHF m**	1 995	3 270	12 588

Reference: *Estimated mean value per employee – EUR 59000, ** 1EUR ≃ 1.5 CHF
Sources: Census of Enterprises 2001, FOS (Betriebszählung (BZ) 2001, BfS); Project Team KW-CH, own calculations, University of Art and Design Zurich (Hochschule für Gestaltung und Kunst Zürich) © 2005 (Studie I)

In 2001, there were approximately 8,000 (City: 4,000) operationally-active creative enterprises in Canton Zurich's (Zurich City's) creative industries, ranging from the music, book, art, design and architecture industries to the film and performing arts industries. Within these creative branches, or subsegments, most of the approximately 36,700 (City: 22,400) persons found viable jobs. Calculated at the full-time equivalent this comes to 30,700 (City: 19,000) positions, which reaches a total turnover of approximately CHF 8.3 bn. (City: CHF 5.1 bn.). According to a conservative estimate, that's a gross value added of at least CHF 3.3 bn. (CHF 2 bn.) for Canton Zurich's (Zurich City's) creative industries. This reflects a relative contribution of 3.7% (4.3%) to the Gross Domestic Product (GDP) of Canton Zurich (Zurich City).

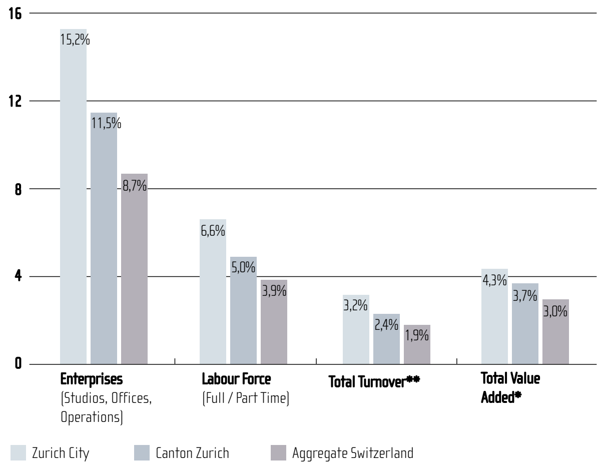
For nearly all the values attained for Zurich's creative industries, *Zurich City makes up at least 50% of Canton Zurich's total values, while Canton Zurich amounts for approximately one fourth of the total values for Switzerland's Aggregate*.

Looking solely at these base values, Canton Zurich's creative industries already exhibit a considerable labour force and turnover potential. The analysis reflects an economic sector comprised of a complex of independent markets.

Comparing the 36,700 employees in the creative industries in 2001 with the 47,000 employees of the banking institute - Zurich business location's actual key branch – the significant relative importance of the creative industries becomes evident. Of comparative note, official employment statistics have shown mechanical engineering to hold a marginal 16,500 employment figure.

Moreover, a comparison with the financial industry points to an important structural characteristic of the creative industries: for the 47,000 employees in the banking institute there were approximately 750 enterprises, while in the creative industries there were 8,000 workplaces for 36,700 employees. *A reflection, in other words, of the predominately small and smallest business enterprises, often even single-person business enterprises, operational in the creative industries.*

Illustration 4: Share of Creative Industries in the Overall Economy in %, 2001

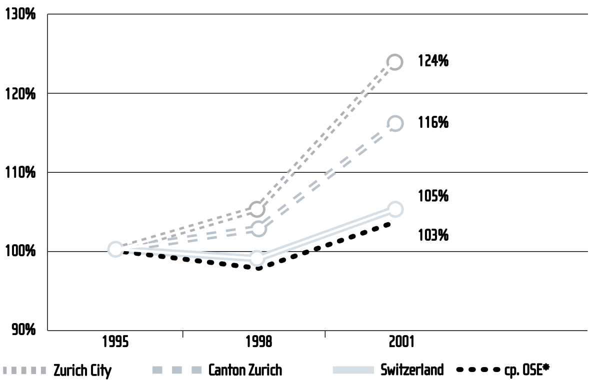


Reference: *Estimated value, **2000
Sources: Census of Enterprises 2001, FOS (Betriebszählung (BZ) 2001, BfS); Project Team KW-CH, own calculations, University of Art and Design Zurich (Hochschule für Gestaltung und Kunst Zürich) © 2005 (Studie I)

Viewing the share of creative industries in the overall economy, Zurich's values come in strikingly over the Swiss average. In some parts, the percentages for Zurich City are astonishing: while the share of enterprises for the whole of Switzerland is close to 9%, Zurich City's is substantially larger at 15%. In terms of labour force, produced turn-over and gross added value, Zurich City shows itself to be a remarkable centre for creative industries in Switzerland. Add to that the across-the-board above average values for Canton Zurich, and what emerges is a strong potential for the development of a creative industries cluster, even if just from a purely statistical viewpoint.

This correlates to the observations made by interviewed market participants that only Zurich City Region provides the size and variability of a comprehensive creative industry network.

Illustration 5: Rise in Labour Force 1995 - 2001



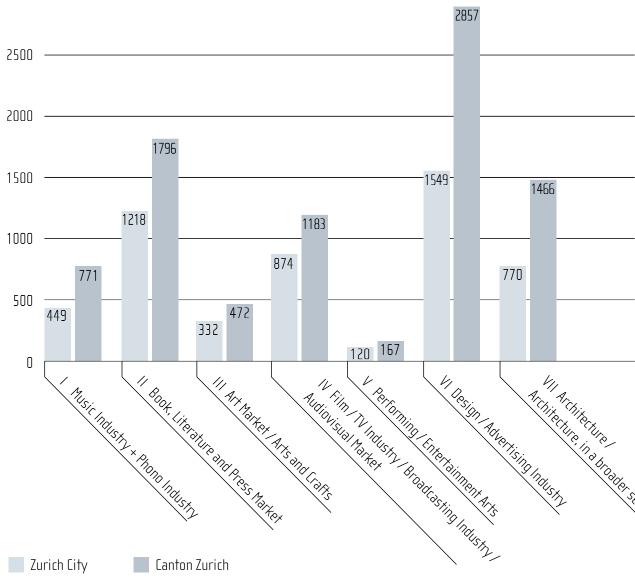
Reference: Changes in Labour Force (Full/Part Time) in %, Basis 1995 = 100% * Overall Swiss Economy

Sources: Census of Enterprises 2001, FOS (Betriebszählung (BZ) 2001, BfS); Project Team KW-CH, own calculations, University of Art and Design Zurich (Hochschule für Gestaltung und Kunst Zürich) © 2005 (Studie I)

Looking at the 5 % labour force development in the creative industries between 1995 – 2001, this ratio reflects, as expected, faster growth than in the overall Swiss economy. This impressive increase in employment is quite amazing, given the dynamic activity already prevalent in the creative industries. Add to that the increase in Canton Zurich of 16% (Zurich City 25%), and it becomes evident that this branch segment has become increasingly significant. Noticeable as well, is the way in which this region was able to profit from this branch segment during the time period studied.

A detailed look at the individual sub-sections (s. Studie I) confirms this.

Illustration 6: Turnover in Zurich's Creative Industries (in a narrower sense/in a broader sense) in CHF m* 2001



Reference: Estimated value for Canton and Zurich City according to overall Swiss turnover 2000 in relation to employment labour force
* 1 EUR ≃ 1.5 CHF

Sources: Value Added Tax Statistics 2000, FTA (Mehrwertsteuerstatistik (MWST) 2000, ESTV); Project Team KW-CH, own calculations, University of Art and Design Zurich (Hochschule für Gestaltung und Kunst Zürich) © 2005 (Studie I)

The design/advertising industry displayed the strongest turnover with over CHF 2.8 bn. for 2001, followed by the book, literature and press market with approximately CHF 1.8 bn. and architecture with a CHF 1.5 bn. produced turnover for Canton Zurich. Likewise, Studie I shows clearly that the turnover-related share of Zurich's creative industries in the values for Switzerland lie by over 25%. The highest values show up under the design industry being over a third of the overall Swiss turnover volume, and the film industry at nearly 30%. Zurich City amounts for over 50% of Canton Zurich's turnover in all of the sub-sections.

Key to any discussion regarding creative industries is Zurich's balanced employment structure across all the individual branches. Zurich doesn't convey the image of a mono-structure, a dominating sub-segment due to the presence of some big corporation. Instead, it appears to be a well-balanced branch-mix, well-suited to forming the basis of a cluster management.

From an empirical-quantitative perspective, Zurich – like almost no other part of Switzerland – offers the possibility to position its creative industries within a larger economic strategy. This becomes even more evident when looking at several studies* which have independently arrived at the same conclusion: that Zurich – particularly the city – is moving increasingly away from being a production location and increasingly toward being a service platform.

* e.g.: Standortmonitoring Wirtschaftsraum Zürich 2004, Greater Zurich Area, September 2004 or Wertschöpfung im Kanton Zürich, Entwicklung von Regionen und Branchen 1980 bis 2005, Zürcher Kantonalbank, 2001

Illustration 7: Branch Distribution in %, 2001

Creative Industries Have No Mono-Structure: Labour Force (Full-Time Equivalent) in **Canton Zurich**

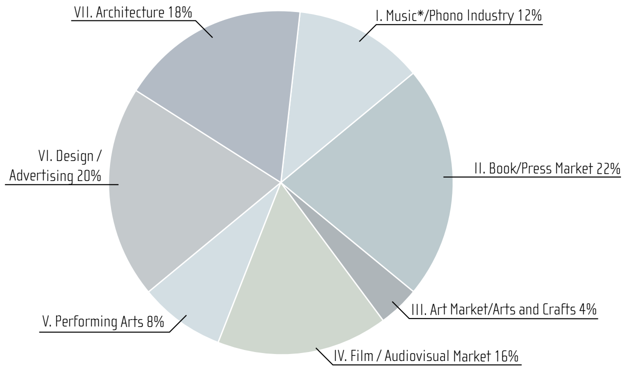
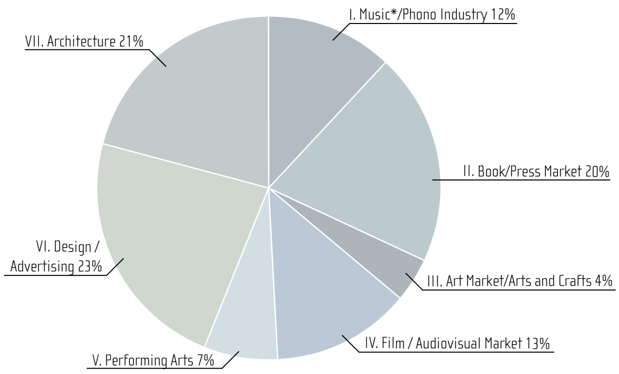


Illustration 8: Branch Distribution in %, 2001

Creative Industries Have No Mono-Structure: Labour Force (Full-Time Equivalent) in **Zurich City**



Reference * Individual economic sectors doubly allocated.
Source: Census of Enterprises 2001, FOS (Betriebszählung (BZ) 2001, BfS); Project Team KW-CH, own calculations, University of Art and Design Zurich (Hochschule für Gestaltung und Kunst Zürich) © 2005 (Studie I)

The empirical-quantitative analysis points to a series of typical characteristics found in creative industries:

Table 2: Characteristics of Creative Industries

Enterprise Structure	Creative enterprises are typically comprised of smallest and medium-size business enterprises. They display a particularly high job intensity.
Growth Potential	Creative industries form a counterweight to the traditional industries, which due to structural changes, are shrinking industries.
Personnel Structure	Newly emerging enterprises in the creative industries are personnel-intensive, and demand above average, up-to-date credentials.
Gender Aspects	In contrast to traditional industries, creative industries show a higher-than-average portion of female employees.
Regional Qualities	Creative industries are developing in infrastructural and environmental dimensions. Emerging is a regional economic composite of similar and related branches, producers and service providers.

Source: Söndermann und Weckerle 2005: Studie I – Der privatwirtschaftliche Teil des kulturellen Sektors im Kanton Zürich

[2.2] Zurich in International Data Comparison

Comparing Zurich with other metropolitan regions like Berlin or Vienna also leads in part to similar figures. In 2001, 4.9% of those employed in Canton Zurich worked in the creative industries, while a comparative figure for Berlin in 2002 was an approximate 4.5%, and in Vienna an approximate 4.3%. These relatively uniform ratios across the three metropolitan areas are also seen when comparing the corresponding countries. According to figures from EUROSTAT, both Switzerland and Germany produced a share value of 2.7% in the cultural sector, and Austria 2.0%, of overall employment.

The regional importance of the three metropolitan areas diverges, on the other hand, when viewed from within each country. The employment potential of the Berlin cultural sector isn't so significant within Germany itself, being just a bit greater than the comparative Hamburger potential. In each city, the cultural sector is decidedly smaller than 10% of the total German cultural sector, while the states North Rhine-Westphalia, Bavaria and Baden-Wuerttemberg all share double digit share values, making them the most important regions of Germany's cultural sector. In contrast, approximately one fourth of the total Swiss creative industries are concentrated in Canton Zurich alone. Even greater are the concentration levels in Austria. Almost half of all those culturally active in Austria work in the metropolitan region of Vienna which matches French ratios: In 2002, close to half of all those culturally active in France were located in Paris.

This brief comparison reinforces the potential Zurich's creative industries have at an international scale. It also reconfirms the solid position of Zurich's creative industries in the aggregate Swiss context, and in particular, the Zurich City Region. *Creative industries, in their role as independent sectors and important service providers (content-carrier function), are clearly suited to being positioned to provide these functions to other branches.*

[2.3] Qualitative Portrait – Core Activities, Strategic Assets, Axes of Interaction

Relational Equity of the Creative Industries

In order to formulate a qualitative portrait of Zurich's creative industries, the overall branch complex needs to be viewed as an interdependent, networked system of sub-segments which are *often a part of functional, division of labour value added processes*. In this context, the relational equity of Zurich's creative industries presented in Section 1.2 plays a leading role, expressing itself in differing forms: in individual relationships, formal and informal cooperation among enterprises, important key persons and go-betweens among the different sub-segments as well as in the patterns of interaction within the branches.

In analyzing the self-perception of creative industry market participants, a qualitative portrait emerges of Zurich's creative industries core activities, the central axes of interaction between the specific sub-segments and the strategic assets. Independent sub-segments display a superordinated structure, showing themselves to be an important *economical driving force* in their role as interface to the other service sectors, *and important for the cultivation of a public and international awareness*, as well as being responsible for knowledge production and education. The following illustration and tables give an overview.

Illustration 9: Core Activities of Zurich's Creative Industries – defined according to the assessment of the project's participating market participants

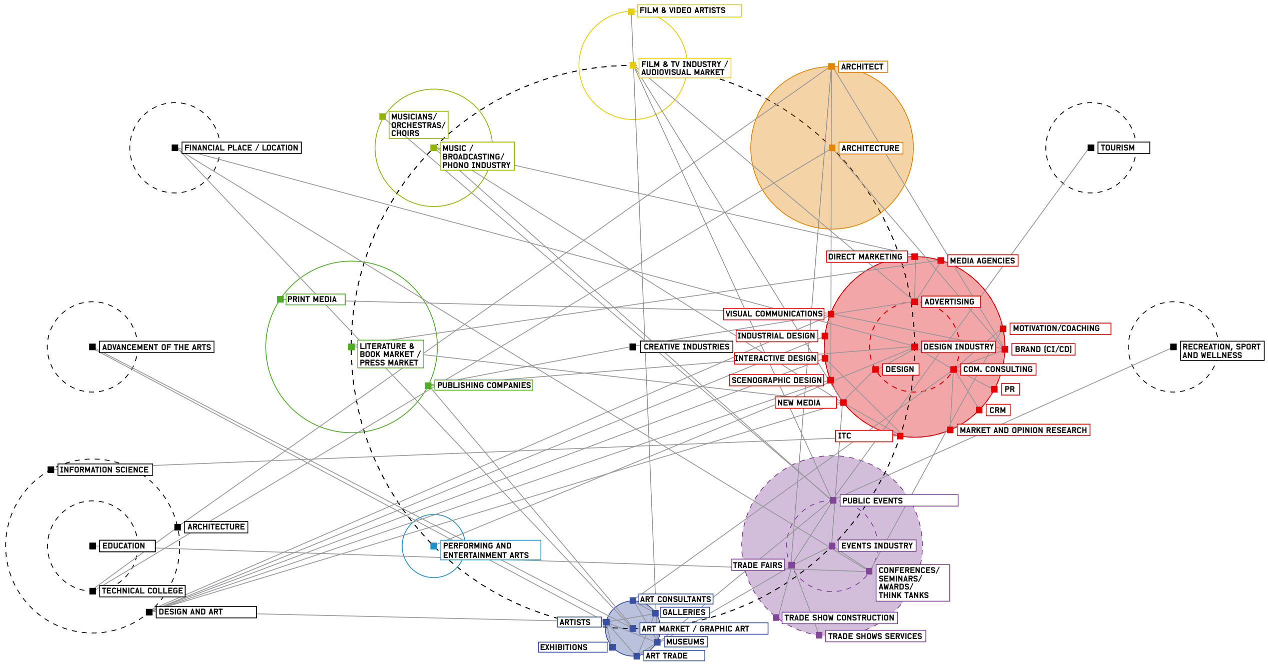


Table 3: Core Activities of Zurich's Creative Industries from the Viewpoint of Market Participants

Core Activity	Function
Design Industry	innovation function in the form of «Ideas Swiss Made» – interface of urban economies – education and research as the sustainable driving force of an internationally established design industry – supplier of employment
Architecture	internationally-renowned architecture functioning as a trademark – innovations function – light house function – interface in international networking
Events Industry	platform – market place – quality and service awareness – trendsetter
Art Market	international art production – close ties to financial place – capital intensive

Source: Held and Kruse 2005: Studie II – Raum für das Kreative

Table 4: Interaction Axis of Sub-Segments in Zurich's Creative Industries from the Viewpoint of Market Participants

Axis of Interaction	Sub-Segments
Axis of Interaction of the Financial Location	design industry – art market – financial location
Axis of Interaction of Cultural Image	art market/visual arts – performing arts – literature, book and press market – music, film and TV industries
Axis of Interaction of Visualisation	events industry – design industry – architecture – education and continued education
Axis of Interaction of Knowledge	education and further education – architecture – design industry

Source: Held und Kruse 2005: Studie II – Raum für das Kreative

Table 5: Strategic Assets of Zurich's Creative Industries from the Viewpoint of Market Participants

Strategic Assets	**Function**
Zurich's Financial Location	host-city function – main enquirer of knowledge-based services – important economical driver and intermediary facilitator within international networks
Education and Further Education	development of creative industries as knowledge-based economies – development of the relational equity – innovation – research
Events Industry	international positioning and visualisation for Zurich
Art Market and Performing Arts	sponsorship – drawing in of international clientele

Source: Held und Kruse 2005: Studie II – Raum für das Kreative

[2.4] Zurich in the Global Network of Creative Industries

Competitive positioning as well as international economic embedding and recognition of services are all important to the future of creative industries. Although the study does not contain any statistical analysis of the actual networks between Zurich's creative industries and those of other European locations, interviews with market participants already provide a revealing picture: in German-speaking locations, Zurich's creative industries are *networking with the Berlin, Hamburg and Vienna locations as well as in part with Frankfurt and Düsseldorf*. In addition, they exhibit close ties to *London, Paris and Amsterdam*.

Key persons and enterprises should be emphasized here, who take up important intersections in the area of architecture and design, as well as to varying degrees, the art market, the music industry and literature market. In their intermediary position as messenger in Zurich's creative industries, they execute important services and innovations at a global level (s. Illustration 10).

The interface between the national and international markets plays a vital role in the future of creative industries. Interviewed market participants see this as a weak point. Zurich seems to have difficulty making international locations aware of its presence or capabilities. The blame is often put on the long years of focus on the national market as well as the neglect of language quality standards in the predominately Anglo-Saxon dominated markets, because exactly in these markets, a relatively large demand potential from other service sectors in Zurich exists. These sectors, however, often appoint their services abroad. *Creative industries need to find a way to draw in these available demands at their own location while also becoming attractive as a competent contact partner to foreign enterprises.*

[3] Zurich's Creative Industries as a System of Interactions

Market Participants, Learning and Interaction Processes

[3.1] The System of Market Participants in Creative Industries

The creative industry in Zurich is a predominately division of labour, networking system of interactions. Its qualities, internationalization and development, depends on the structure and the embedding of its relational equity. Key to these competencies and networks are the people within the creative industries: the market representatives themselves. In order to understand the relative importance of creative industries to a functional economic area such as Zurich City Region, *a concrete understanding of the functional interdependencies market participants in creative industries are subjected to*, must be taken into account. Creative industries, in particular, are strongly tied to the roles of key personalities – *the creative industry is to a great extent a «people's business»*.

Market participants don't just engage at a purely economical level. Their interrelationships actually form, in most part, out of the context of interdependencies: through the social structures, local and cultural norms, as well as the economical and societal embeddings of an individual market participant. There are underlying contractual and monetary relationships, on the one hand, and individual and entrepreneurial business networks, on the other. The differentiation between the three types of embedding – relational, structural and geographical – should be mentioned here due to its importance in identifying the potential for a better positioning of creative industry market participants.

Relational embedding refers to a relationship between two market participants who develop a high degree of capability on the basis of the cultivation of mutual trust and long-term collaboration. Trust thereby reflects the social context within which market participants engage, making trust-building measures of strategic importance to Zurich's creative industries.

Structural embedding refers to relationships and interactions which are occurring simultaneously among a multitude of various market participants. It also establishes the conditions from which loose, unorganized as well as specific and organized, networks emerge. Key to these formations are primarily reputation, trust and social position.

Geographical embedding explicitly integrates the local components of interaction. For enterprisers, this is an important basis for operating within local, regional as well as international networks. This reinforces, once again, the reason why it is important to foster Zurich's creative industries as independent branches and content-carriers within Zurich's location.

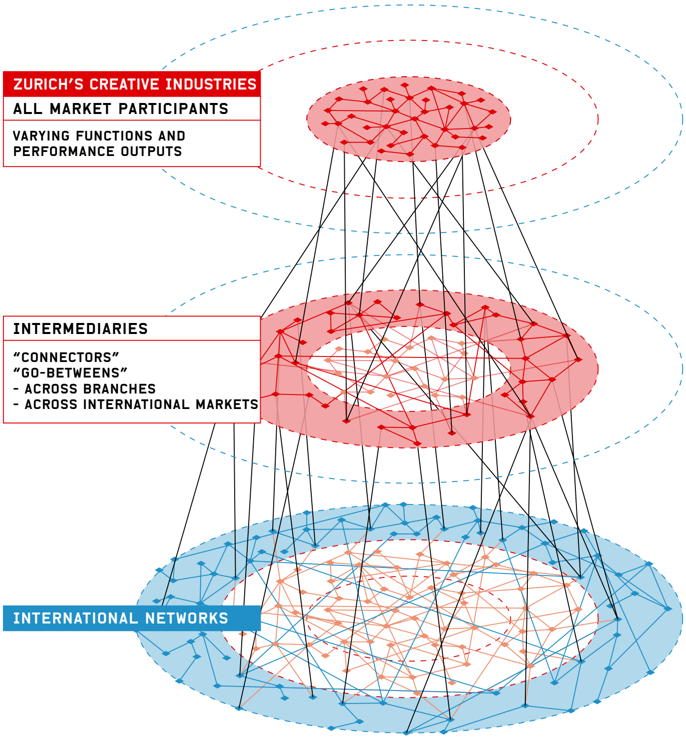
System of Market Participants as Carriers and Driving Forces in the Creative Industries

From the individual sub-segments and overall creative industries, a *system of market participants emerges in the form of a three-tiered structure*. This system acts as the carrier and driving force of Zurich's creative industries processes. Understanding this system of market participants is essential to analyzing creative industries:

Level 1: On the top level of the system of participants (s. Illustration 10), the entirety of participants in the creative industries is mapped out in a *loose, non-organized pattern*. Here it is important to note that Zurich's creative industries, to a large degree, are *influenced by individual market participants* - the empirical-quantitative analysis has already made this small-scale structure apparent. Single businesses, freelancers and students fall under this heading. Creative industry products can be distinguished through a high job intensity.

These are therefore correspondingly cost-intensive on the one hand, while presupposing on the other, a large pool of specific abilities, flexibilities and personalities (precisely those relational equities as strategic assets).

Illustration 10: System of Market Participants in the Creative Industries



Source: Held und Kruse 2005: Studie II – Raum für das Kreative

Collaboration among these market participants is based on personal networks and individual recommendations *within a self-organized process*. The services performed here range from professional acquisition and adequate financial compensation of performances to payments - which only cover a very small portion of the actual efforts- as well as favours and personal exploitation.

Particularly the small and smallest businesses - the empirical data point to a high share of single-person operations in various sub-segments - are reliant upon the development of more efficient networks. Often they lack the necessary competencies, as well as resources to carry out a job. Comparatively speaking, the classical small and medium-sized enterprises (SMEs), which mainly carry out more complex and larger services for one or more big clients and buy needed services externally, are rarely seen. On the basis of this structure of market participants, specific strategic goals need to be developed in order to better position creative industries.

Level 2: Well-known individuals, having their reputation and high profile at their disposal, are important in linking creative industries to varying content fields. They play the role of intermediary, *the facilitator and go-between*, across the individual sub-segments of the creative industries, between established and non-established art and culture, between state and private institutions of the culture and creative industries, between creative industries and other economic areas (e.g., financial services) as well as between Zurich's creative industries and the international market. Without these key figures, the creative industry's embedding into a functional, urban economy, would not happen.

Level 3: At the third level are the international networks. Zurich's creative industries will only gain international recognition if they are integrated into appropriate networks. This is reflected in the request of interviewed market participants to open regional and national markets.

[4] Looking Ahead
Positioning Zurich's Creative Industries

[4.1] Requirements, Scenarios, Conjectures and the Need for Action

The two complementary processes of empirical-quantitative and interactive-qualitative analysis of the creative industries should accomplish the following two goals:

- Construct an empirical-quantitative portrait of Zurich's creative industries, based on international standards, structured according to subsegments as well as Zurich City, Canton Zurich and the whole of Switzerland (Studie I).
- Clarify to what extent and in what form a «Zurich's Creative Industries Cluster» would be useful for creative enterprises and for Zurich's economy as a whole (Studie II).

The interaction with and among the market participants has shown how essential the embedding and positioning of creative industries is in the context of the urban economy. Of fundamental need is: *the acquisition, i.e., creation of physical and non-physical space for the creative industries.*

This goal is fully laid out in section 4.2. It is derived from the following:

- the above-average growth potential which the empirical-quantitative analysis has made apparent;
- the needs of the market participants in the subsegments (sources: interviews, think tank workshop);
- the scenarios developed by branch representatives *for the year 2010*;
- the correspondingly derived *conjectures* regarding the position and development of creative industries;
- the clear *need for action* evidenced in this report.

Details and explanations regarding the needs, scenarios, conjectures and need for action can be read in Studie II (Kreative Zürich – Raum für das Kreative).

Illustration 11 presents a matrix of the main results from the two complementary partial studies. It depicts those elements from the quantitative and qualitative analysis which lead to the formation of goals for a future-oriented positioning of Zurich's creative industries.

Illustration 11: Matrix of Results from the Complementary Partial Studies (Sources: Quantitative Data Analysis, Studie I, Interviews, Think Tank Workshop, Studie II)

Results from the Empirical - Quantitative Analysis	Complementary Results	Results from the Interactive-Qualitative Analysis

Results from the Empirical - Quantitative Analysis

Structure of Enterprises
Creative enterprises account for a large portion of the smallest and medium-sized businesses, which exhibit an especially high job intensity.

Growth Potential
Creative industries supply a counterbalance to traditional branches which are dwindling as a result of structural changes.

Personnel Structure
Newly formed enterprises within the creative industries are personnel-intensive and demand above average and up-to-date qualifications.

Gender-Aspects
In contrast to traditional industries, creative industries display a higher than average percentage of female employees.

Regional Ties
Creative industries develop in milieu and infrastructure-oriented dimensions. Emerging from this is a regional economic composite formed out of the interplay among similar and related branches, producers and service providers.

Complementary Results

Cluster Strategy

Goal: Make Room for the Creative Industries

Results from the Interactive-Qualitative Analysis

Scenarios for the Year 2010

Scenario 1: Zurich – Open Source for Creative Processes
Turn «Ideas – Swiss Made» into an international brand, a top-selling product reflecting the creativity actively being lived out in Zurich. Creation of a focused international visualisation through interdisciplinary platforms, trade fairs and the Global Creativity Forum, which draws in international experts to Zurich each year

Scenario 2: Paradise for the Creatively Talented
Years of ongoing politics to push creative industries to the forefront of Zurich's overall economy and among international competition, has finally paid off. Zurich is now one of the top locations in the world when it comes to promoting talent, services and products of the creative industry, renowned educational centres and innovation research in design.

Scenario 3 Zurich – The New Creative Nexus
Zurich's design sub-segment as the regional asset is nurtured through intense dialogue with a strong internationally-oriented art market. The events sub-segment becomes its promotion vehicle. It is fuelled by the financial market which, in the meantime, has come to realize that it profits directly from the Design School of Zurich, a school for innovative thinking now established in Zurich. It stands for a way of thinking that is significantly relevant to companies.

Requirements

- «A completely different economy. We need support which can guarantee this.»
- «It's not about fostering an image, but rather about a lasting value added idea.»
- «Create a platform only if it carries genuine, plausible ideas: believable ideas and people are necessary.»
- «First define the ideas and potentials, not just put the primary focus on money.»
- «Visibility: launch two to three combined international projects, which bring about a 'breakthrough'.»
- «Dissipated activities: for the Swiss, this would be deadly.»
- «What's needed is a declared political will.»
- «A network of strong people is needed: from the industry, from design-related branches, from politics, across the 'Röstigraben'»(note: a term used to refer to the cultural divide between German and French-speaking Switzerland)
- «In our case, economic development means being able to put yourself in someone else's shoes.»

Conjectures

1. Creativity as the driving fuel of the economy
2. Mutual recognition rather than exclusion
3. The intermediary as a key link
4. Strong Swiss «players» needed to prevent brain drain
5. Increased flexible market meets flexible creative market participants
6. Zurich's creative industries need recognition and adequate general conditions
7. A more flexible market requires a flexible facilitation structure
8. Zurich's creative industries need regional infrastructure and pulsating areas of emphasis
9. Original, unmistakable products are the basis for lasting success
10. Fostering creativity means fostering processes through to the establishment of sustainable systems
11. Service provision processes should be taken into account

A Call for Action

1. Reveal the character and function of a cluster of creative industries in Zurich
2. Sharpen inner and outer awareness
3. Make the potential visible and invest in research
4. Position by combining contents and activities as well as establishing points of emphasis
5. See creative industries as a regional innovation process
6. Transparency and communication
7. Take into account key persons

Conclusion 1 regarding future actions:
Strategies implemented in the mobilization of the creative industries are multilayered, not one-sided.

Conclusion 2 regarding future actions:
Cultural and economic development should be made more flexible.

Inferences Drawn from the Scenarios for the Year 2010

Over the course of a one-day think-tank workshop at the University of Art and Design Zurich (HGKZ), a scenario for the future of Zurich's creative industries was developed in collaboration with leading branch representatives*.

Table 6 gives an overview of the three defined scenarios for the future of creative industries in the form of 8 key points. They document branch representatives' observations that new focuses of action should be established as well as the corresponding necessary potential be found.

* Details regarding the individual scenarios can be found in Studie II.

Table 6: Eight Key Points Derived from the Three Scenarios for the Year 2010.

Key Points
Strengthen core activities in Zurich's creative industries
Intensify positioning of education and research – create a talent pool
Promote relational equity as central asset (Zurich as Open Source – Paradise for the Creatively Talented – Zurich: The New Creative Nexus)
Increase networking and embedding in Zurich's overall economy
Develop platforms and market places
Establish the Global Creative Forum in Zurich
Market «Ideas Swiss Made» as an international brand
Make room for the creative industries

Source: Held und Kruse 2005: Studie II – Raum für das Kreative

Aside from discussions centred around possible strategies, talk about the demand at the product level was repeatedly addressed, i.e., *creative industries will only be successful when they become unique and unmistakable, not copy able. This means the delivery of artistic and cultural products and services which reflect a regional infrastructure and rootedness*.

[4.2] Goal – To Make Room for Creative Industries

The goal of a future-oriented creative industries strategy must be to turn the potential for innovation, and the driving power of the creative industries in transforming the urban economic area (in the role of content-carrier and interface), into lasting sustainable value. In addition, a sustainable value added strategy should be implemented. In order to do so, more room must be established for the creative industries. This means the following:

1 The majority of creative industries become self-forming. «Make room for creative industries» implies that the creative industries search for their own space on the basis of proximity and cooperation, as well as actively and strategically participate in the design of the clustering process of market participants in the creative industries.

Consequence: Self-defined creative industries, mobilization of self-organized labour and private initiatives stand at the start of the basis of a reflexive learning and interaction process.

2 «Make room for creative industries» means viewing physical space as a social product, keeping in mind the social-spatial potential in the formation of physical space. In this way, creative industries insure themselves the appropriate city spaces and facilities. Innovations seldom have their origins in upscale areas of a city with optimal profits, but instead in areas where smallest businesses – which are an important part of the service provision provider process - can pay the rent, and enough useable space is available. Networked activities naturally arise as a result.

Consequences: Creative industries increase their power as addressee of city planning, town planning and urban development, as well as public and private property management.

3 «Make room for creative industries» implies that there must be enough places of identification for the creative industries. Alongside existing cultural institutions, additional «public destinations» arise whose goal it is to promote a creative Zurich.

Consequences: In more extensive planning (e.g., new convention centre, Maag-Areal, Löwenbräu-Areal, city area around Zurich's Main Train Station), the potential of the creative industries (e.g., Design Centre, new location for Zurich's Design School, Kreativpark) would be included as early in the process as possible, and in accordance with the growing importance for the development of urban economic areas.

4 «Make Room for Creative Industries» means to account for the fact that market participants in the creative industries are increasingly moving between the public, private and intermediary sectors. It is therefore imperative to use the capillary interrelationships among the three sectors and to develop the corresponding structures, platforms and offers.

Consequences: As a result of such goals, new strategic and operative challenges would be posed in economic and cultural politics. Ways of implementing the three-sector model sketched out in Section 1.1 would need to be thought out.

[4.3] Cluster Strategy for Zurich's Creative Industries

Where do we go from here? The findings of the analysis of the enterprise and sub-segment data as well as the needs, scenarios, conjectures and need for action should not find their end in the formulation of these goals (Section 4.2), but also go on to have noticeable political and economical consequences.

Because: economic policy and cultural policy, in the modern sense of the word, are merging and displaying ever-increasing overlapping in their fields of activity. A sustainable cultural policy, in the eyes of the interviewed market participants, should focus on more than just public cultural advancement, and should incorporate relative economic policy. And conversely, economic policy needs to acknowledge the cultural sector and, in particular, the creative industries as relevant, sustainable market participants. This would require an integrated cultural and economic policy. If the economic business development in Canton Zurich and Zurich City begin supporting creative industries, this will certainly be a sign of change.

Within the framework of the process, conceptual approaches were composed for the development of a «Zurich's Creative Industries Cluster».

«Cluster» is actually more than a buzzword in the modern economy. The approach is goal-oriented and market participant-specific – cluster management as a means to an end. Or, in the words of many of the participating creative market participants in this project: The goal is not to cultivate an image within the confines of the creative milieus in Zurich, but instead to define and implement a lasting value added idea .

«Zurich's Creative Industries Cluster» differs decisively from other clusters, such as the areas of high-tech, life sciences or the financial place. Table 7 formulates the specific requirements needed to form a creative industries cluster in Zurich:

Table 7: Specific Requirements Needed to Form a Creative Industries Cluster in Zurich

Zurich's creative industries cluster is successful when it:
accounts for the self-defining market participants structure in Zurich's creative industries and proves itself capable of absorbing the special thinking and working methods of the various creative processes.
has developed an understanding of the specific logic of the creative industries economy.
views the creative industries within the context of high division of labour processes and the value added chain: with a clear eye on the hybrid structures of the activity fields of the market participants in the creative industries and with the necessary sensitization to their entrepreneurial identity
can integrate new findings from the creative industries field of research, and thereby, for example, discuss demand (in contrast to supply) aspects of this complex of branches

In order to determine the conceptual and strategic approaches, a process has been suggested in Studie II which seeks to purposefully expand existing structures, and in so doing, enable a cluster formation process and a cluster strategy. In particular, an initiative with representatives from university, creative industries, policy and administration, should be established, which seeks to implement the formulated strategic activity fields, and thereby strengthen Zurich's creative industries.

Authors, Project Teams and other Contributors

Authors

Thom Held freelances in the area of spatial development (Held Planning and Sustainability, Zurich). Areas of specialization: sustainable development; city and territory between old and new developments; regional development; territorial governance; social thinking and learning processes. He collaborates with Christian Kruse in the working group Inwert.ch.

Christian Kruse performs research in the area of knowledge-based urban economies as an economic geographer at the University of Zurich (Uni Zürich) and Swiss Federal Institute of Technology in Zurich (ETHZ). Areas of specialization: financial place research; European metropolitan regions; regional innovation systems; regional cluster development; interaction processes in business networks. He combines his research work with the organisation of think-tank events. He collaborates with Thom Held in the working group Inwert.ch.

Christoph Weckerle teaches and performs research at the University of Art and Design Zurich (HGKZ) in the area cultural policy/cultural economy. In addition, he is responsible for special projects. He is a member of an international research network which examines cultural policy and creative industries, in a comprehensive sense.

Michael Söndermann works in Cologne/Bonn in the area of applied cultural and economic research with special focus on statistics. He also counsels governmental departments and departmental organisations in Germany, Austria, Luxembourg and Switzerland. He is a member of an international research network which examines cultural policy and creative industries in a comprehensive sense.

Visualisation of the Relational Landscape

Lukas Schwitter, Student, Interaction Design at the University of Art and Design Zurich (HGKZ) (lukas.schwitter@hgkz.net)

Illustrations and Layout

Johannes Hoffmann, Student, Interaction Design at the University of Art and Design Zurich (HGKZ) (johannes.hoffmann@hgkz.net)

Project Team

In addition to the authors, the following are members of the project team: Anita Martinecz (The Economic Development Department of the Canton of Zurich), Robert M. Blancpain (The Economic Development Department of the City of Zurich) and Thomas Sevcik (Arthesia).

Interview Partners from the Creative Industries:

Rea Eggli (swissandfamous, Zurich), Markus Freitag (Freitag-Taschen, Zurich), Patrick Frey, Zurich (Edition Patrick Frei Casino Wintherthur, Zurich/Winterthur), Hans-Ruedi Galliker (Galliker Kommunikation, Männedorf), Stefan Haupt (Fontana Film, Zurich), Susan Kish (First Tuesday, Zurich), Philipp Klaus (University of Zurich, Dissertation: Zurich's Cultural Sector), Adrian Kohler (Communico GmbH, Rheinfelden), Michel Loris-Melikoff and Robin (Street Parade, Zurich), Marc Payot (Hauser& Wirth, Zurich), Elmar Ledergerber (City President, The City of Zurich), Bruno Schmidt (MetaDesign, Zurich)

Participants in the Creative Industries Think Tank Workshop (11.2004)

Peter Brunner (sogar theater, Zurich), Peter Christian Fueter (c-films, Zurich), Ruth Grüninger (Ruth Grüninger Design, Zurich), Marc Haas (Frame 11), Niels Haueter (Swiss Re Centre of Global Dialogue, Rüschlikon), Thomas Kärcher (Life Sciences Cluster Zurich), Luigi Kurmann (Galerie Mai 36, Zurich), Dominik Landwehr (Migros Kulturprozent), Lucien Leitess (Unionsverlag, Zurich), Benno Maggi (Agentur für Integrierte Marketing Kommuikation, Winterthur), Ruedi Alexander Müller (Nose Aplied Intelligence, Zurich), Jacqueline Otten (Design Department, University of Art and Design Zurich, HGKZ) Markus Schäfer (Hosoya Schaefer Architects, Zurich/Rotterdam), Marc Spiegler, Pascal Urscheler (nemos GmbH), Thomas Sevcik (Arthesia)