

# ***Regional Maritime Clusters***

***Göteborg, 27 May 2009***

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**Hanse-Office / Land Schleswig-Holstein**

# *Regional maritime clusters*

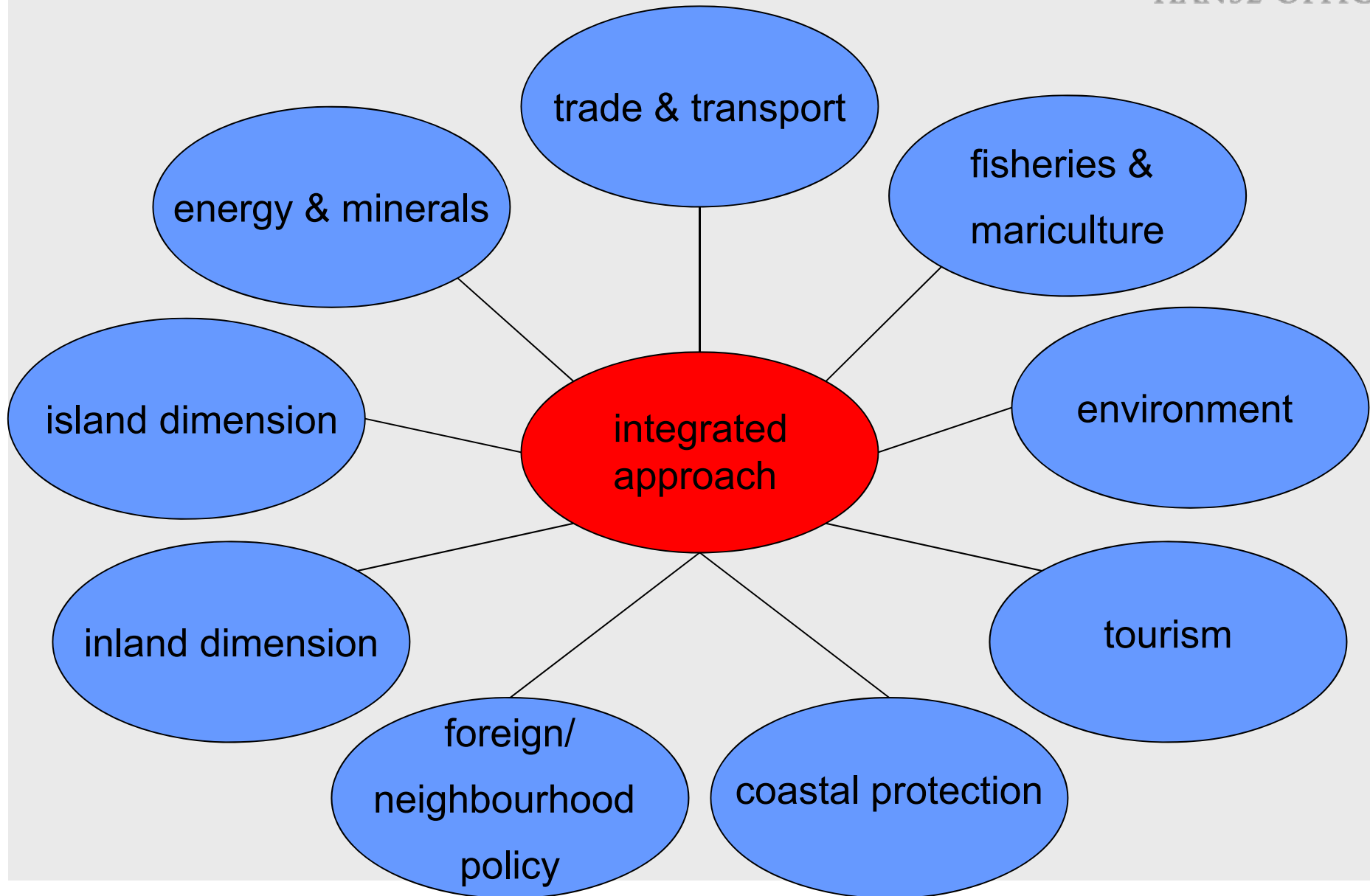
- what is a maritime cluster?
- study on maritime clusters
- CPMR group Aquamarina
- regional maritime cluster example Schleswig-Holstein

# *Regional maritime clusters*

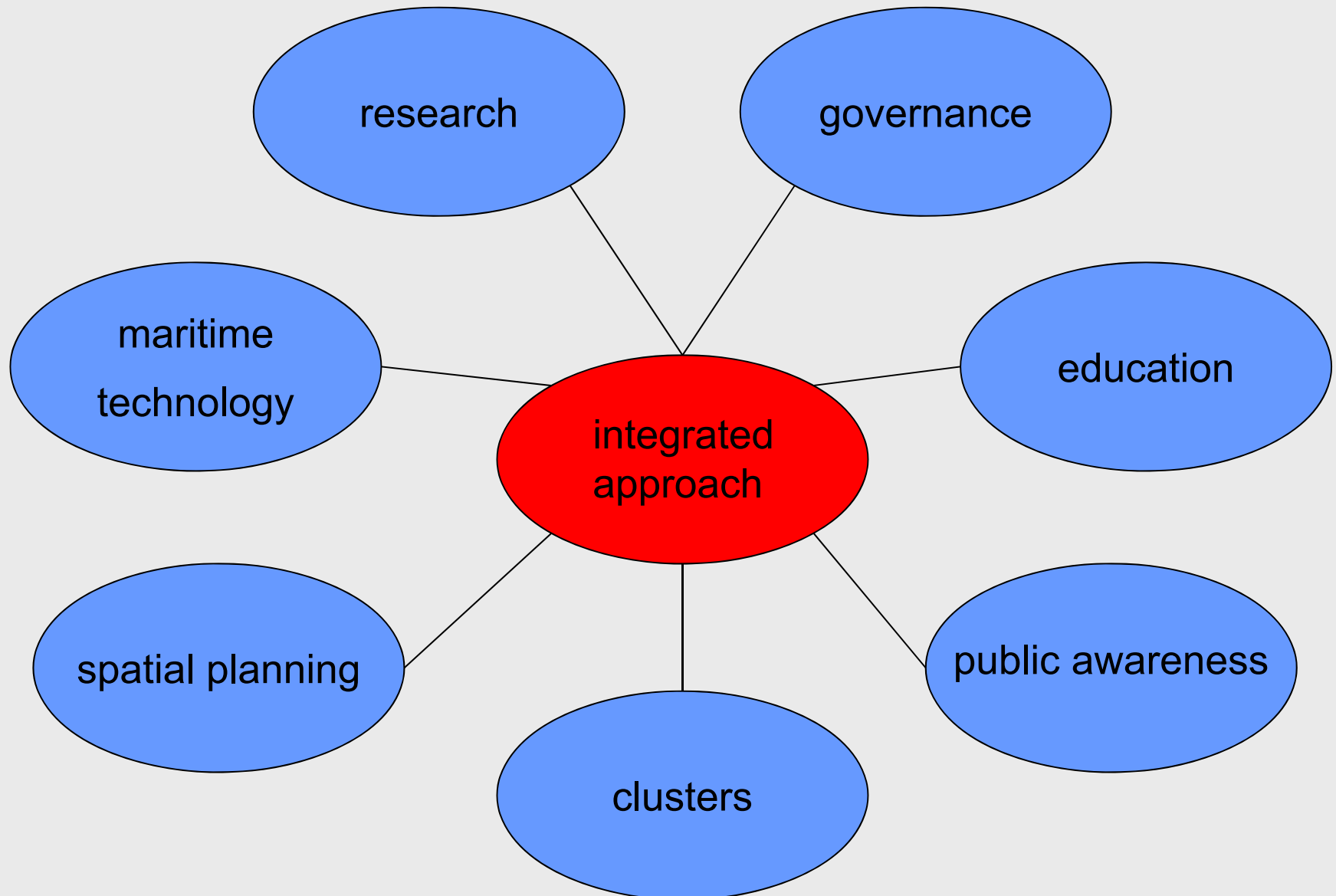
why a maritime cluster?

why a maritime policy?

# Sectoral maritime policies



# Maritime policy instruments



- main objective of the maritime policy:  
to integrate the sectoral policies under one common roof
- the maritime clusters reflect one out of many instruments for integration of some sectoral policies

## definition of (regional) maritime clusters

- The word “clusters” is a mainstream word today. Many actors have many definitions.
- Diversity of approaches: economic weight, many different branches or concentration, linkage among industry, research and policy, global, national, regional, etc.
- CPMR project “Europe of the sea”: a network of firms, research, development and innovation (RDI) units and training organisations (universities, specialized schools, etc.), sometimes supported by national or local authorities, which co-operate with the aim of technology innovation and of increasing maritime industry's performance.

## criteria and indicators could replace a fixed definition

- **quantitative elements**, such as economic growth rates, employment rates, cluster size, big companies or SMEs, etc.
- **qualitative elements**, such as trust and cooperation, general impact on the economy, linkages to other players such as other companies, research infrastructures or policy makers/administrations,
- **organisation of the cluster**: territorial (regional) dimension, economic branches, management (grade of formalisation), financing etc.
- at the regional level aside maritime clusters there are often “**cluster-like-structures**”



**On behalf of the European Commission  
Executed by Policy Research Cooperation  
(November 2008)**

- **objectives**
- **assessment of key figures of maritime clusters in the EU and Norway – economy, employment**
- **cluster strength (european Cluster Observatory's star method)**
- **main trends and policies**
- **role of maritime cluster organisations**

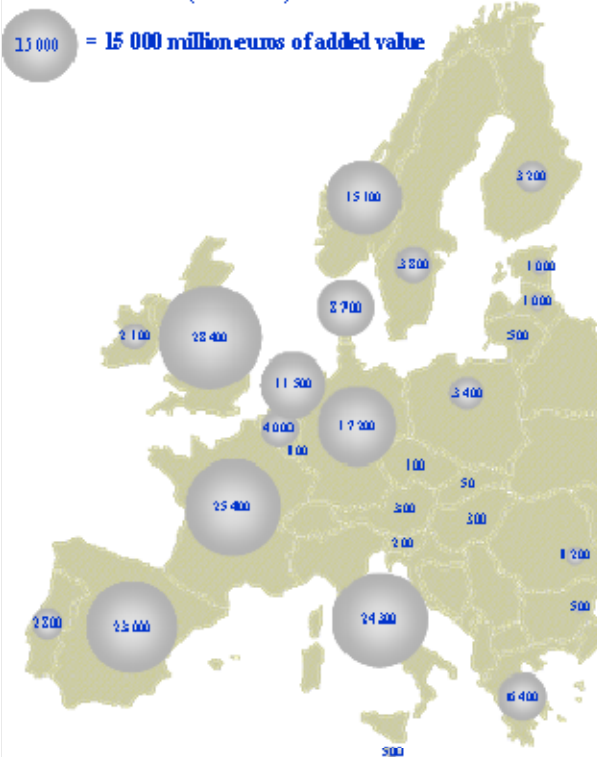
# EC study on maritime clusters

## added value and employment in all the maritime sectors (all areas) in the EU and Norway

### Added value

Direct ( $\Sigma$  direct) added value = 186.8 billion euros

15 000 = 15 000 million euros of added value

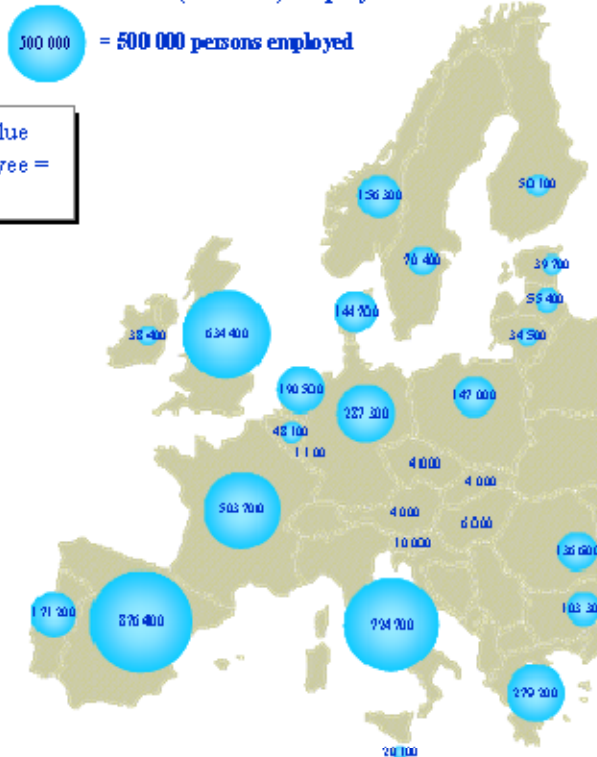


Percentage maritime added value in national GDP	
Europe:	1.65%
MT:	11.36%
CY:	9.07%
EE:	8.83%
LV:	7.71%
NO:	6.23%
DK:	4.19%
GR:	3.24%
LT:	2.59%
ES:	2.53%
NL:	2.25%

### Employment

Direct ( $\Sigma$  direct) employment = 4.78 million persons

300 000 = 500 000 persons employed



Percentage maritime employment in national employment	
Europe:	2.25%
MT:	13.51%
CY:	12.02%
NO:	6.85%
EE:	6.54%
GR:	6.39%
LV:	5.36%
DK:	5.26%
ES:	4.62%
BG:	3.46%
PT:	3.34%

Average value added/employee = € 39 000

Source: EC / Policy research cooperation

## main maritime sectors in the EU

- **employment:** coastal tourism, Navy, marine equipment, shipping, ports, shipbuilding
- **added value:** coastal tourism, shipping, seaports, marine equipment, Navy, shipbuilding
- energy?

## **added value / employment (simplified)**

- **traditional maritime sectors:** North/West Europe esp. Hamburg – Le Havre Range
- **tourism and recreation:** South/West Europe
- **fisheries:** West Europe

## main cluster trends

- to promote the maritime cluster
- to increase research, development and innovation
- a shift from sector policy to cluster policy

## maritime cluster organisations (simplified)

- **top down**

government, holistic / wide approach, long term strategy / policy, focus on cooperation of maritime sectors

- **bottom up**

strong leader firms, limited cluster approach, short term benefits, focus on operational problems

- **national cluster organisations (simplified)**

mainly established after 1990, main topics: labour, exchange of know how, innovation and research, image building, environment and public affairs

- **regional cluster organisations (simplified)**

mainly established after 2000, main topics innovation and research, exchange of know how, business development



## **Aquamarina**

# **Conference of Peripheral Maritime Regions of Europe (CPMR)**

## recent CPMR maritime projects

- project “Europe of the Sea” (2004/05)
- “pioneering regions” presented 33 “best practice” examples (2007)
- “Aquamarina” (2008/09)

## Aquamarina leading region: Brittany

- Schleswig-Holstein proposed to set up a first thematic commission on maritime research and maritime clusters (TC MarMac) on the first Aquamarina plenary (kick off), 26 March 2008.

## TC MarMac objectives:

- preparation of positions on EU-policies
- list of regional best practice examples
- exchange of expertise among regional maritime clusters

## **list of best practice examples (open)**

- Asturias
- Basse-Normandie
- Brittany
- Hampshire / Southern England
- Nord Pas-de-Calais
- North Norway
- Provence-Alpes-Côte d'Azur
- Schleswig-Holstein
- West Finland

# ***Regional maritime clusters - examples***

## **list of contributions on the Maritime Day 2009**

- Maritime Cluster Schleswig-Holstein, Germany
- Pôle Mer PACA and Pôle Mer Brittany, France
- Marine south east (South East England), UK
- Naval and nautical technological district of the Friuli Venezia Giulia region, Italy
- Mare Novum, Centre for marine Innovation & development, Göteborg/Region of Västra Götaland, Sweden
- Integrated Marine science, studies and business centre (valley) Lithuania

## integrated maritime policy – mile stones



- 2004: launch of the state initiative “sea our future”
- 2004: appointment of the state maritime coordinator
- 2005: task force “sea our future”
- 2005: launch of the maritime cluster
- 2008: Maritime Action Plan

A logo for "Zukunft Meer" (Future Sea) with the tagline "sea our future". The text is white and orange on a blue background with a wavy pattern.

Zukunft Meer  
sea our future

# Maritime Cluster Schleswig-Holstein



- science – economy – policy
- to initiate and to link maritime activities on a local and regional scale
- to contribute to more jobs in the maritime industry in the long term
- to strengthen the maritime position of SH

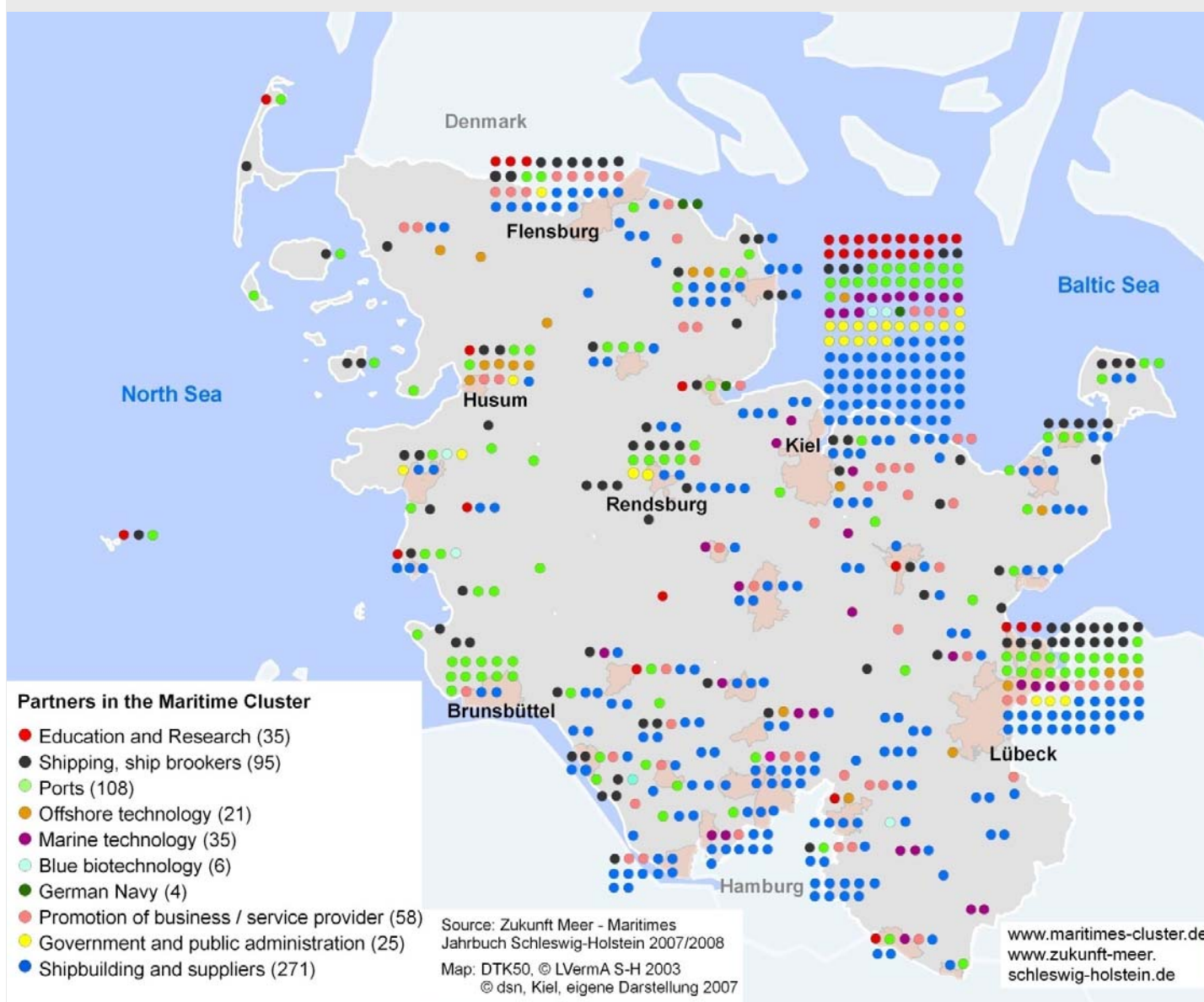
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sea our future



# Maritime Cluster Schleswig-Holstein



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# Maritime Cluster Schleswig-Holstein

## Facts about the maritime economy of Schleswig-Holstein

	2003	2006
Companies	1,500	1,700
Employees	46,000	47,000
Gross domestic product	8.3 %	12 %
Turnover (billion €)	5.5	8.5



### Structure of the companies:

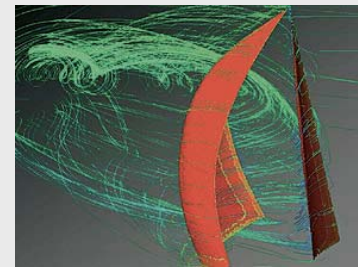
about 90% of the companies have less than 250 employees

### Sectors

Shipbuilding suppliers, Shipbuilding, Offshore and maritime technologies / Maritime research technologies, Offshore wind, Maritime Logistics, Marine Aquaculture

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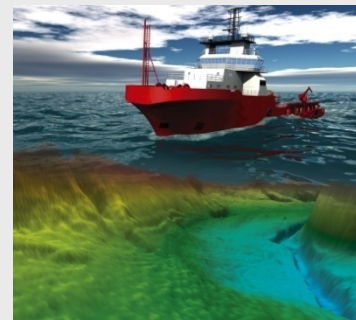
## The Maritime Cluster Management Phase II



- **Name:** Maritime Cluster Management Schleswig-Holstein (MCM)
- **Established:** 1st of July 2008  
– 30th of June 2011
- **Partners:**
  - Chamber of Industry and Commerce SH
  - Business Development and Technology Transfer Corporation of Schleswig-Holstein (WTSH)
  - and others
- **Supporting body:** WTSH (State Government)

## The MCM at the glance

- **Budget 2008-2011:** € 800,000
- **Employees:** 2.5 staff members
- **Supported by:**
  - ~ 60% Ministry for Science, Economics and Transport of Land Schleswig-Holstein
  - ~ 40% Companies



Dr. Wiebke Müller-Lupp,  
Clustermanger



Simone Hoseas,  
Projectmanager

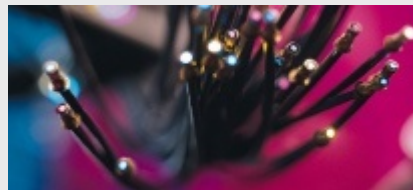


Bilge Dreysel,  
Assistence

## Focus and Services



>>Communication



>>Technology transfer



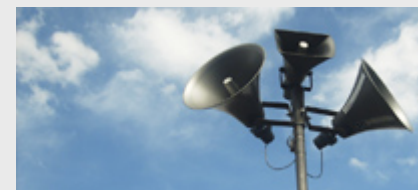
>>Innovation



>>Financing and  
Funding



>>Internationalisation



>>Marketing & PR



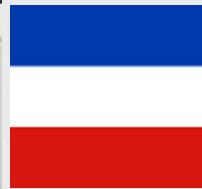
# SH Cluster projects I

## Ocean Monitoring System (OMS)

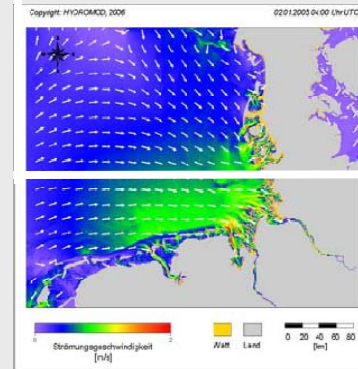
December 2004: Tsunami, Indonesia



Raytheon Anschutz  
established the



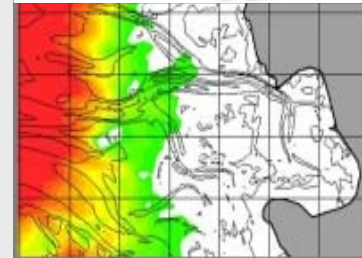
Schleswig-Holstein  
Tsunami Working group



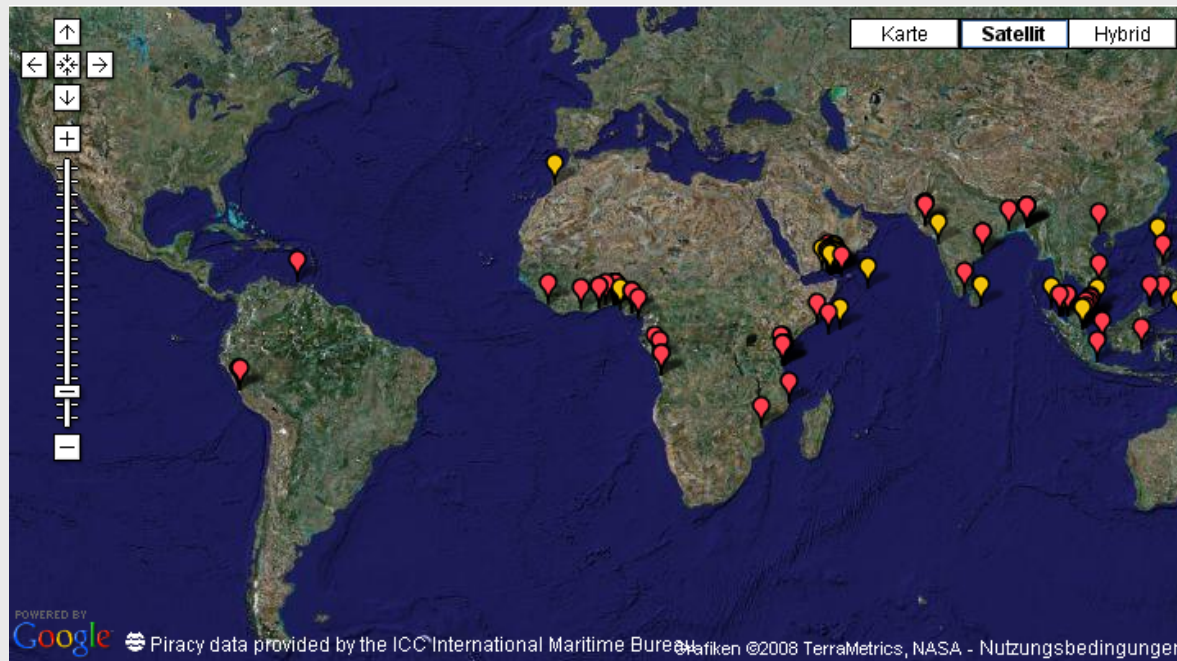
## Ocean Monitoring System (OMS)

### Integrated early warning system for marine hazards

- The aim is to develop a powerful system which provides data and information for many fields in the marine environment ranging from oceanography to coastal engineering, ship security, fisheries, coastal and environmental protection and tourism.
- Integration of all meteorological, oceanographical and geophysical influences in the coastal area:
  - Real-time data to run simulation models
  - Measurements of the spatial and temporal changes of e.g. currents, salinity,
  - Information concerning ship traffic,
  - Investigation of sediment transport and displacement,
  - Measuring extreme events (storm surges) with high accuracy, and providing such information via the Internet.



## Piracy- and terrorism defense system for ships (PITAS)



In 1992, the escalating number of piracy incidents led to the establishment of a Piracy Reporting Centre in Kuala Lumpur, Malaysia.





## PITAS

- Integrated security system against piracy and terrorism for ships and yachts
- Project proposal at the national project executing organization (BMWV), Project budget € 5 Mio.
- Content: case scenarios, sensors and effectors, reaction (Alarm), interfaces, infrastructure, track management, system security, physical demonstrator
- Regional Cluster, 8 partners (companies, shipyard, research institutes, Federal Armed Forces  
Lead partner: Raytheon Anschutz GmbH



# Summary on regional maritime clusters

- maritime clusters are one political tool to support the integrated maritime policy
- many different definitions do exist; regions often have “cluster-like-structures”
- the EC presented a first systematic study on maritime clusters in Europe
- Aquamarina supports the exchange of best practice of regional maritime clusters on the EU-level
- Schleswig-Holstein as one best practice example on regional maritime clusters





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# Zukunft Meer sea our future

**Thank you  
for your  
attention!**