Regional Maritime Clusters

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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

- trade & transport
- fisheries & mariculture
- energy & minerals
- environment
- tourism
- coastal protection
- foreign/ neighbourhood policy
- inland dimension
- island dimension

integrated approach
Maritime policy instruments

- research
- governance
- maritime technology
- education
- spatial planning
- public awareness
- clusters
- integrated approach
Maritime policy

- 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 maritime clusters**

**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.
**Definition maritime clusters**

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”
EC study on maritime clusters

On behalf of the European Commission
Executed by Policy Research Cooperation
(November 2008)
EC study on maritime clusters

- 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 (2 direct) added value = 186.8 billion euros

= 15 000 million euros of added value

**Employment**

Direct (2 direct) employment = 4.78 million persons

= 500 000 persons employed

Average value added/employee = € 38 000

**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: 2.12%

**Percentage maritime employment in national employment**

Europe: 2.25%
MT: 13.31%
CY: 12.03%
NO: 6.85%
EE: 6.54%
GR: 6.39%
LV: 5.36%
DK: 5.26%
ES: 4.62%
BG: 3.46%
PT: 3.34%

Source: EC / Policy research cooperation
EC study on maritime clusters

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?
EC study on maritime clusters

added value / employment (simplified)

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

main cluster trends

- to promote the maritime cluster
- to increase research, development and innovation
- a shift from sector policy to cluster policy
**EC study on maritime clusters**

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
EC study on maritime clusters

- **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)
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
**Regional maritime clusters - examples**

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

Source: Maritime Action Plan Schleswig-Holstein
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 natical 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
Example Schleswig-Holstein

integrated maritime policy – milestones

- 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
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
Facts about the maritime economy of Schleswig-Holstein

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Companies</td>
<td>1,500</td>
<td>1,700</td>
</tr>
<tr>
<td>Employees</td>
<td>46,000</td>
<td>47,000</td>
</tr>
<tr>
<td>Gross domestic product</td>
<td>8.3%</td>
<td>12%</td>
</tr>
<tr>
<td>Turnover (billion €)</td>
<td>5.5</td>
<td>8.5</td>
</tr>
</tbody>
</table>

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
Maritime Cluster Schleswig-Holstein

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)
Maritime Cluster Schleswig-Holstein

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, Assistance
Maritime Cluster Schleswig-Holstein

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 Anschütz established the

Schleswig-Holstein Tsunami Working group
**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.

Ocean Monitoring System (OMS)

www.ocean-monitoring.de
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 (BMWI), 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 Anschütz 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.
Zukunft Meer
sea our future

Thank you for your attention!