

3rd Roundtable of the European Maritime Cluster Organisations



22nd September 2006

UK Chamber of Shipping - 12 Carthusian Street - London

Draft **Minutes of Meeting**

The Conference Dinner on September 21st, 2006 was hosted by the Chamber of Shipping. Aperitif and dinner took place in a splendid ambiance.

For the list of participants, see *Annex 1*.

Opening

The Chair, Mark Brownrigg, opens the Roundtable at 09.00 hrs with a warm welcome to everyone, followed by a short who-is-who.

Maritime Cluster Definitions for Europe

Niko Wijnolst starts off with the presentation of "The benefits of a uniform definition of maritime clusters" (*Annex 2*).

Followed by Harry Webers (Policy Research Corp.) "Experiences and Perspectives" (*Annex 3*).

Hereafter a discussion on cluster definitions, common grounds and differences leads. The main question is:

What is the reason to quantify the importance and interrelationships of the European Maritime cluster?

The prime target is to be clearly the required political and economic attention. Governments e.o. should take proper note of the value of the maritime activity, both in terms of overall perception and in their policy-making. Secondly it may help all parties to understand the dynamics between the sectors and the companies and, as such, form a solid basis for policy making and for business growth.

To fulfill a longer-term objective, any study should also focus on establishing an agreed common template and definitions for gathering such statistics on a regular and consistent basis in the future. Such a template could then be used by existing and new cluster groupings at all levels, national and regional as well as European

And finally a better understanding of the cluster will stimulate maritime interaction between the member states and the EU.

Compatibility between European and National data should be ensured. For historical and practical reasons, individual countries and sub regions have created their own limited cluster definitions, given their perspective on their local situation. On the other hand the Maritime Policy Taskforce of the European Commission takes an all embracing integral approach in which also seaside land tourism is taken as maritime.

As it is important that all opinions of individual countries or organizations are respected, it is suggested that a very wide cluster definition is followed, with an option to take certain sectors or “modules” out. This will make it possible both to achieve a genuine and comparable assessment at European level and to allow individual member states to adjust that in a compatible way for their own particular purposes at national or local level.

All sectors should be defined and assessed in an agreed manner for all countries. The following sectors should be considered, with the central sectors in normal print and the optional “modules” in italics.

Agreed maritime sectors

Shipping
Shipbuilding
Marine Equipment
Seaports (excluding land logistics and port industry)
Maritime Services (including research and education)

Agreed maritime sectors with optional subsectors

Yachtbuilding (*marinas, services*)
Offshore Services (*wind energy, oil & gas extraction, production value extracted energy*)
Fishing (*sea-based fish-farming, sea-farming*)
(excluding fish-processing, trade)

Optional maritime sectors

Navy and Coastguard
Inland Waterways
Dredging and Waterworks

Optional maritime-related sectors

Coastal Tourism.

On the basis of agreed cluster and sector definitions statistical inventories and surveys should be carried out to produce figures on turnover, direct and indirect Value Added, international trade etc. Data should be available on (sub)sector levels as well as on national levels. Existing data material (e.g. from Eurostat) will be the major source of information, but has proven to be incomplete, often inconsistent, and based on varying timescales. This will probably lead to a rolling update of information; therefore the focus should be as much on establishing a statistical method as producing an initial set of figures.

In conclusion it is decided that a paper will be prepared and circulated to all members with the request to give comments.

Preview of the book : *Dynamic European Maritime Clusters*

The book, which is a cooperation between the Maritimt Forum and the Dutch Maritime Network, will officially be presented during the MIF Plenary Sessions, Oslo, 5-6 October 2006 to the Norwegian Minister, Mr. Jens Stoltenberg and vice-president of the European Commission, Mr. G. Verheugen. Copy is handed to all participants. Extra copies are available upon request.

As background Rikke Lind mentions that the Norwegian objective for the book is to show the strength of the maritime cluster and contribute to the Norwegian political debate on clusters. Preceding the MIF meeting the Maritimt Forum will host a press diner, which will be held on October 4th, for which participants are heartedly invited.

This followed by an extensive tour d'horizon through all participating countries giving following highlights:

Holland: A new innovation subsidy for Shipping has been established by the Dutch Government, resulting in a 10 million Euro facility. The Dutch Maritime Network was evaluated with a positive result, however this unfortunately could not prevent a decrease in budget. Furthermore two studies are in progression on the economical situation per 2006 as well as the labour market.

Finland: Positive to mention that taxation files of companies can be used for research purposes.

Spain: With the support of the Ministry of Industry the Spanish maritime cluster will officially be launched in Bilbao, end of January 2007. Up to now the cluster consists of seven associations. Furthermore discussions about the Green Paper have already started and the gathering of statistical information has begun. All participants are invited to be present at the inauguration meeting in January!

Denmark: The action plan as stated in the leaflet "The Danish Maritime Cluster - an Agenda for Growth" has great Governmental support. As in many European countries also in Denmark there is a problem of how to get young people interested in the maritime industry. In order to attract attention a big, two year campaign has been launched, with a budget of about 1 million DKr. Furthermore two new research and innovation institutes have been opened

Italy: The aim is to keep costs as low as possible. The Italian cluster is totally dependent on private money! As known the Federation del Mare issues an update of figures every three years, compiled in a (very nice) book. Besides the maritime industry the Federation also includes maritime lawyers and insurers. Focus point of Italy also on environment and on attracting youngsters to the maritime professions. Question: why is there no representative of the German cluster?

Corrado Antonini offers to have the next meeting in Rome! The offer has been gratefully accepted.

France: The French cluster also is in discussion with both Luxemburg and Portugal. Lobbying now comprises seven actions. The French cluster contains fifteen working

groups with a broad scope and high level participants. Until now one concrete initiative has materialized.

Norway: The highlight of 2006 is the organisation of the MIF Plenary Sessions in Oslo October next. Furthermore in November a national strategy on New Maritime Policy is expected.

Poland: First goal is Act of Ports.

U.K.: Cluster activity is taking place in the UK on several different planes, including within Sea Vision UK on image/profile and careers, within regional and subregional groupings on commercial matters, nationally on training, and informally at national level also on policy matters. The range of sectors covered in all of these is very broad. Proud also to inform that shipping figures have shown spectacular rise, even overtaking the figures for air transport.

This discussing results in a healthy appetite and therefore the meeting is adjourned for a buffet lunch.

European Maritime Policy Green Paper

Some views about the Green Paper approach are exchanged.

Finland states that the boundaries of the debate are now set by the EU members States - should there not be a broader scope direction world-wide.

Italy: The Italian Government has already given some comments. One of the objections towards the Policy is that in fact there is no policy and a number of aspects are not dealt with. The advise is to progress in a practical way.

U.K. warns to be careful in first reactions.

Holland: The Dutch Maritime Network is organising a Second European Maritime Policy Conference to be held in Brussels in November. All participant are requested to probe with their respective national politicians, who could make a contribution. Names will be appreciated.

European Network of Maritime Clusters

As already outlined in the Paris meeting a draft will be made stating the Terms of Reference/Articles of Association of the ENMC. The Dutch Maritime Network will make a first proposal.

Furthermore it is the intention to organize a working lunch with members of the European Parliament in Brussels, hosted by the Dutch Maritime Network. Details will follow in due course.

Closing

As there are no more items on the agenda, the Roundtable chairman thanks everyone for their contributions and wishing all a good trip home, closes the Meeting.

Leaves all of the participants to thank our British hosts for their great hospitality and organisation of the meeting !

Participants - ENMC meeting London 21/22 September 2006

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