



30 October 2006

DEAR COLLEAGUES,

The European Network of Maritime Clusters is gradually taking shape. We just had a successful annual meeting in London on 21-22 September hosted by the UK Chamber of Shipping, and the successful presentation of the book *Dynamic European Maritime Clusters* at the MIF Plenary Session in Oslo on 5-6 October.

The Green Paper on a new European Maritime Policy also emphasizes the importance of clusters for the future of maritime Europe. We are hopeful that Commissioner Borg will support a European-wide maritime cluster study in order to get a solid basis under the new policy. This could even be announced during the upcoming 2nd Conference on the New European Maritime Policy, organised by Mare Forum on 23 November 2006, in Brussels.

In this 3rd Newsletter we briefly discuss the various topics in more detail and we encourage you to contribute to future issues as well. Please do not hesitate to contact us.

Look forward to hear from you soon.

Niko Wijnolst
chairman

Francis Vallat
vice-chairman

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Report from the 3rd ENMC meeting in London

Good food, good company and good discussion! This sums up the annual ENMC meeting hosted by Mark Brownrigg in London on 21-22 September at the stylish Camber of Shipping premises. For those arriving early, and that were most of us, UK Sea Vision offered a great dinner, of course preceded by drinks. The photograph illustrates the happy crowd.

The major point on the agenda was the question of how to define the maritime sectors and clusters. Each country has a different way of doing things and therefore it is difficult to compare clusters, but also to use statistics. As a warming up to the discussions, two presentations were made by Niko Wijnolst and Harry Webers. The first presentation stressed the need and benefits of a common set of definitions for policymakers at home and in Europe. In the second presentation the statistical issues were discussed in the light of past experiences and future expectations.

Under the skilful chairmanship of Mark Brownrigg, each cluster organisation presented its views on the topic, and in the end a consensus emerged on the way forward. Henk Janssens and Harry Webers have “volunteered” to write a draft recommendation which will be circulated for comments. It is our intention to present the final document to the EU Maritime Policy Task Force for their consideration.

We do hope that the ENMC definitions will become the basis for a possible update of the European Maritime Cluster Study.



A nice buffet lifted our spirits after the intensive discussions and we continued the meeting with a discussion of the Green Paper. In some countries the discussion of a new European Maritime Policy is high on the agenda, but in other countries it is not yet “alive and kicking”. The book *Dynamic European Maritime Clusters*, just from the press, was presented. Each national cluster organisation receives a large number of copies for distribution, which could help raise the interest of member states and the European Commission in maritime clusters.

Dynamic European Maritime Clusters – MIF Plenary Session

The Norwegian Maritimt Forum hosted this years MIF Plenary Session on 5-6 October in Oslo. Rikke Lind had proposed the Dutch Maritime Network in March 2006 to use that occasion to highlight the importance of European maritime clusters to the participants, and of course to the Norwegian public and politicians as well.

We took up the challenge and asked a number of organisations to cooperate, as well as the European Commission, DG Enterprise and Industry. Time was short, as we had only five months to produce the book.

We are very grateful for everybody's cooperation and so we could make the deadline and were able to hand the book over officially to the Norwegian Prime Minister Jens Stoltenberg before the opening of the conference. The book was also presented thereafter to Commissioners Verheugen and Borg, and to the more than 300 participants. The night before the conference, Maritimt Forum organised a press-dinner where many of the ENMC members joint in. We like to congratulate Rikke Lind and her chairman Terje Andersen for their hospitality and tremendous efforts to promote the European maritime clusters. Thanks to the Norwegian Maritimt Forum, the MIF Plenary Session became a success.

(www.mifoslo.com www.mif-eu.org)



Waterborne Technology Platform

The Waterborne TP launched the Strategic Research Agenda (SRA) at the EU Technology Platform meeting 4-5 May, 2006 in Vienna when members of the Support and Mirror Group presented Commissioner Potočník the first copy.

The Waterborne SRA will be an input for the work of the European Commission which currently drafts the 7th Framework Programme. The first call of the 7th FP will be launched in January 2007. (www.waterborne-tp.org)

The European Commission, DG Research has created a Transport Advisory Group (TAG) which advises the Commission on the future Work programmes. The first meeting of the TAG was held in Brussels on 19 September and Niko Wijnolst was appointed member and elected chairman.

2nd Conference European Maritime Policy

Mare Forum and the Dutch Maritime Network organise, in cooperation with the ENMC members and the European Commission, a second conference on the future European Maritime Policy, in particular the Green Paper. This event will take place in the Brussels Marriott Hotel on 23 November.

More information can be found on the website www.mareforum.com

Danish Maritime Cluster

Earlier this year the Danish Government launched an action plan for supporting the growth in shipping as well as other maritime industries in the Danish Maritime Cluster. The basic aim of the action plan is to ensure the necessary framework that will enable the maritime industry to meet the global challenges.

Denmark presently enjoys a good position. Danish shipping is currently among the world's most competitive with foreign currency earnings of approximately DKK 140 billion from the sector in 2005. Over half of Denmark's service exports are also attributable to maritime transport.

Danish shipping operates 7 to 8 per cent of world tonnage, but accounts for close to 10 per cent of the total turnover from global maritime goods transport. Other industries in the maritime cluster also make a significant contribution to export earnings.

The cluster accounts for direct and indirect employment of just over 100.000 persons or 6 per cent of the private workforce in Denmark.

However, further growth will not occur automatically. Globalisation and international competition are placing greater demands on shipping companies and other enterprises in the Danish Maritime Cluster.

It is essential that the economic framework conditions remain attractive. They must be stable and updated when necessary. It is also essential to have a maritime administration that can match the regulatory needs of the industry, both nationally and internationally.

This is paramount if Denmark will retain and improve its position as an international maritime nation with quality shipping and commercial efficiency.

The initiatives in the action plan are concentrated in 7 focus areas:

Education and recruitment;

Research, development and innovation;

Taxation and raising of private venture capital;

Reduction of administrative burdens on the industry and national technical requirements;

Promotion of Danish influence and increased market access;

Increased focus on quality shipping and

A modern and efficient maritime administration.

Basically the action plan can be seen as a Public Private Partnership.

The action plan is in the process of implementation with the Danish Maritime Authority, an Authority within the Ministry of Economics and Business Affairs as the main driver.

An English version of the action plan is available under

<http://www.dma.dk/graphics/Synkron-Library/DMA/Publications/Danish%20Maritime%20Cluster/ResumeUK/index.html>.

This version contains a short description of the analytical grounding for the plan including a sum up SWOT analysis with Strengths, Weaknesses, Opportunities and Threats.

Innovamar Spanish Maritime Cluster

During the last years relevant national trade organisations within the sector have been set up to represent the interest of the associated sector members. This has led to a wide variety of national organisations for ship-owners, shipbuilders, equipment suppliers, etc. In Spain, the national organisations are working jointly with the European organisations as ECSA (Ship-owners), ESPO (Ports), CESA (Shipbuilding), EMEC (equipment supply), EBU (Inland Shipping), EuDA (Dredging), EUROGIF (Offshore), EURMIG (Yacht building) and many more, all representing the interests of individual sectors.

However, in the last decade governments and the maritime communities in many European countries and regions have come to the conclusion that whilst the sectorial representation is quite adequate for the associated members, a number of joint and integrated opportunities could not be accomplished, and that some form of organisation structure would be required to achieve optimal integrated results. During 2005 the whole Spanish maritime sectorial organisations, regional clusters, institutions and Government concluded that the time was right to start a joint discussion to create the project of the future Spanish Maritime Cluster (SMC). It is important to note that the project of national cluster will not replace the sectorial organisations in any shape or form, but only will allow, with their approval, various forms of joint activity.

The SMC has defined four main strategic areas to be developed: Intersectorial communication, Innovation & technology, International & national promotion of the entire maritime sector, and Education and training.

At the moment, the Spanish national cluster of maritime sectors will include shipping, shipbuilding, fishing & aquaculture, marine equipment supply, ports, offshore, dredging, yacht building, marinas, services to pleasure boats (as chartering, maintenance, etc...), the Navy and a wide variety of maritime services (such as the marine insurance, financing, maritime lawyers, etc.). Acting jointly in a Spanish national cluster means that it will be easier to attract National and Regional Authorities' attention and with their attention it will be easier for an individual sector to strengthen itself.

As first duties, the members of the Spanish Maritime Cluster have started working together:

- To carry out a statistical measurement of the maritime sector that provides a detailed overview of the current economic impact of and the interaction between activities of the national maritime cluster.
- To analyse the European Green Paper from the entire "Spanish maritime sector" point of view.

The SMC kick-off meeting will take place during the next SINAVAL fair in Bilbao (Spain) on date 26th of January 2007. At the same time, the SMC is working to organize in SINAVAL a European Seminar where the Spanish maritime industry will be able to know and to learn from the European National Clusters experiences.

INNOVAMAR

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