The role of maritime clusters to enhance the strength and development of maritime sectors

Overview of the applied research methodology

November 2008 Commissioned by the European Commission (DG MARE)
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I. DEFINITIONS

I.1. MARITIME AREAS AND SECTORS

The classification of maritime Areas and sectors used in this study is in line with the Terms of Reference laid down by the European Commission and uses the following definitions:

Area 1: Traditional maritime sectors:

- Inland navigation: Inland shipping and ship management; charting-out; inland cruises and ferries; harbour and river towage; freighting;
- Marine aggregates: Exploitation of marine aggregates;
- Marine equipment: Manufacturing and wholesale trade in maritime equipment for all maritime (sub-)sectors (no building, repair and/or conversion and no offshore supply);
- Maritime services: Research and development; education; classification and inspection; bunkering; maritime insurance; maritime financing; maritime brokerage; maritime law; crewing; associations; government services; rescue; diving; ship supply (no port services);
- Maritime works: Dredging; nautical cable and pipelines; river works; construction of canals, dykes and ports; support vessels; sand transport;
- Navy and coastguard (no shipbuilding);
- Offshore supply: Construction and installation of platforms, storage vessels and equipment; drilling; offshore-related transport, engineering, communication, consultancy and other support; seismic research; manufacturing, installation and maintenance of offshore and coastal wind turbines (no extraction of oil such as operators of oil rigs);
- Recreational boating: Boat chartering and renting; marinas; inland boat basins; supporting services concerning the construction of and trade in recreational vessels; boating-related training and trade (no manufacturing);
- Seaports: Cargo-handling; shipping related storage, agency, maritime logistics and forwarding; port authorities; pilotage;
- Shipbuilding: Construction and repair of sea-going vessels (commercial ships, fishing boats and naval ships), recreational boats and inland vessels; ship scrapping; floating sections; dry docks (no offshore-rigs and/or -vessels);

1 A lot of these definitions are quite commonly applied throughout the EU although some differences do exist.
Overview of the applied research methodology

- **Shipping**: Merchant shipping and ship management; short-sea shipping; chartering-out; ferry services; ocean towage (only national seafarers and onshore persons employed);

**Area 2: Coastal and sea-related (marine) recreation and tourism:**
- **Coastal tourism**: Tourism within 10 km from the coast;
- **Cruise tourism**: Service on board of cruise ships (no land-based tourism and/or related services);

**Area 3: Fisheries:**
- **Fisheries**: Maritime and inland fishing; fish processing; aquaculture.

I.2. **NUTS-regions**

The Nomenclature of Territorial Units for Statistics (NUTS) was established by Eurostat more than 30 years ago in order to provide a single uniform breakdown of territorial units for the production of regional statistics for the European Union.

The NUTS nomenclature was created and developed according to the principle of normative regions that are the expression of a political will. Their limits are fixed according to the tasks allocated to the territorial communities, according to the sizes of population necessary to carry out these tasks efficiently and economically, and according to historical, cultural and other factors. The NUTS favours regional units of a general character. Territorial units specific to certain fields of activity (mining regions, rail traffic regions, farming regions, labour-market regions, etc.) may sometimes be used in certain Member States. NUTS excludes specific territorial units and local units in favour of regional units of a general nature.

The NUTS is a three-level hierarchical classification. Since this is a hierarchical classification, the NUTS subdivides each Member State into a whole number of NUTS 1 regions, each of which in turn is subdivided into a whole number of NUTS 2 regions and so on. At the regional level (without taking the municipalities into account), the administrative structure of the Member States generally comprises two main regional levels (Länder and Kreise in Germany, régions and départements in France, Comunidades autónomas and provincias in Spain, regioni and provincie in Italy, etc.).

The grouping of comparable units at each NUTS level involves establishing, for each Member State, an additional regional level (NUTS 3) to the two main levels referred to above. This additional level therefore corresponds to a less important or even non-existent administrative structure.

The NUTS Regulation lays down the following minimum and maximum thresholds for the average size of the NUTS regions as depicted in *Table I.1*.

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2 *Source: European Commission.*

Table I.1: NUTS classification based on number of inhabitants

<table>
<thead>
<tr>
<th>Level</th>
<th>Minimum inhabitants</th>
<th>Maximum inhabitants</th>
</tr>
</thead>
<tbody>
<tr>
<td>NUTS 1</td>
<td>3 million</td>
<td>7 million</td>
</tr>
<tr>
<td>NUTS 2</td>
<td>800,000</td>
<td>3 million</td>
</tr>
<tr>
<td>NUTS 3</td>
<td>150,000</td>
<td>800,000</td>
</tr>
</tbody>
</table>

*Source: European Commission*
II. ECONOMIC DATA

II.1. EMPLOYMENT DATA

The analysis of the employment data in the maritime sectors and Areas in the EU was made by assessing existing employment data, in particular figures from Ecotec’s study “Employment trends in all sectors related to the sea or using sea resources” (2006), the underlying work of Policy Research Corporation\(^3\) and a broad selection of national maritime cluster studies.

Based upon the definitions of Ecotec’s data sources and Policy Research’s experience and know-how with regard to maritime employment, adjustments to Ecotec’s employment data were mainly made in the following maritime sectors:

− Shipping;
− Coastal tourism;
− Recreational boating;
− Marine equipment.

With regard to employment data in shipping, often different definitions are used. The definition of shipping employment in a country used in “The role of Maritime Clusters to enhance the strength and development in maritime sectors” captures all EU seafarers on board of (EU or non-EU) ships as well as onshore personnel. In Ecotec’s study all seafarers (EU as well as non-EU) on national ships (in terms of flag and/or operations) are, for a number of countries, taken into account\(^4\). In this respect, the employment figures of both EU and non-EU seafarers in the Netherlands and Italy are provided as examples in the Annexes. To avoid overshooting in national seafarer’s employment, data of Manpower 2005 Update by Bimco/ISF have been used. To capture all onshore staff employed in shipping, firstly, the number of ships operated in a specific country was extracted from the data sources of Lloyd’s Register/Fairplay. Secondly, this number of ships was then multiplied by an

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\(^4\) More information, see Ecotec Study http://ec.europa.eu/maritimeaffairs/studies/employment/main_report.pdf
average of two onshore staff members per ship to become the number of onshore staff employed in shipping.

Ecotec’s definition of coastal tourism includes employment in all tourist facilities within a zone of 50 km from the coastline. However, in this zone of 50 km, cities are taken into account that are not or very little related to coastal tourism (e.g. Rome, Helsinki, Amsterdam). Decreasing this zone to 10 km excludes a large number/share of these cities/towns. To calculate tourism employment within the zone of 10 km from the coast, employment data from Eurostat (Labour Force Surveys) have been used, in addition to the location of hotels (mainly based upon yellow pages\(^5\)). Moreover, cruise tourism is included in coastal (and marine) tourism and recreation (Area 2), because of the large share of hotel and restaurant personnel on board of cruise ships.

With regard to recreational boating Ecotec considers yacht building, equipment for yachts and related services as part of the sector. However, in some cases, employment in building of and marine equipment for yachts is included in the maritime sectors shipbuilding and marine equipment. To avoid double counting, yacht building is extracted from the data of recreational boating and included (if not already included) in shipbuilding. Employment in producing equipment for yachts is included in the marine equipment sector.

In the sector marine equipment Ecotec’s existing data are sometimes estimated by indicating broad ranges of possible employment figures in this sector (e.g. 50 000 to 80 000 persons employed in Poland). Using its own know-how and expertise Policy Research has narrowed these ranges down to obtain solid data for this sector.

Mainly because of different definitions, there are also differences between the employment figures in this study and the employment figures originating from national maritime cluster organisations. The main differences in the employment figures between this study’s figures and country-figures occur in the following sectors\(^6\):

- Shipping: EU resident seafarers only;
- Shipbuilding: including yacht building (in line with Policy Research (2001) – Economic impact of the maritime industries in Europe);
- Recreational boating: excluding yacht building (but services included);
- Fisheries: including fish processing (in line with statistics in LEI (2006) – Employment in the fisheries sector);
- Coastal tourism: tourism within 10 km from the coast;
- Navy, inland navigation and maritime works are included.

The differences are presented in more detail in Annex 4.

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\(^5\) A telephone and address directory listing commercial organisations.
\(^6\) Definitions of all the sea-related sectors are provided on page 1 of the ‘Overview of the applied research methodology’. 
Employment figures for the sectors Navy and Inland navigation have been included for the EU Member States and Norway based on desk research and Eurostat’s data. Employment data for Bulgaria, Norway and Romania are also based on the analysis of existing sources. Detailed references are provided in the different country reports. All employment figures as used in “The role of Maritime Clusters to enhance the strength and development in maritime sectors” are shown in Table II.1.

Table II.1 : Employment data used in “The role of Maritime Clusters to enhance the strength and development in maritime sectors”

<table>
<thead>
<tr>
<th>Country</th>
<th>Navy</th>
<th>Marine</th>
<th>Equipment</th>
<th>Shipping</th>
<th>Boating</th>
<th>Recreational Boating</th>
<th>Inland Boating</th>
<th>Offshore Boating</th>
<th>Inland supply</th>
<th>Offshore supply</th>
<th>Hunting</th>
<th>Shipbuilding</th>
<th>Support</th>
<th>Other maritime</th>
<th>Services</th>
<th>Logistics</th>
<th>Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>BE</td>
<td>521</td>
<td>750</td>
<td>650</td>
<td>280</td>
<td>320</td>
<td>400</td>
<td>500</td>
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<td>FR</td>
<td>245</td>
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</tr>
<tr>
<td>DK</td>
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<td>700</td>
<td>350</td>
<td>500</td>
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<td>400</td>
<td>200</td>
<td>600</td>
<td>200</td>
<td>100</td>
</tr>
</tbody>
</table>

Source: Policy Research based on various sources

II.2. Production Value and Added Value

The direct production value of a sector is the sector’s turnover minus the purchases within that sector. This production value consists of all the intermediate purchases (purchases both in a country and in a foreign country) and added value. Direct added value in a sector consists of the sum of a sector’s labour costs, depreciations and result, as shown in Figure II.1. These direct effects implicate a direct financial flow to governments through taxes (e.g. income and VAT). Added value in a maritime sector in the EU (and Norway) is the sum of added value in that sector within all EU Member States (and Norway). The sum of direct added value of all sectors within all EU-countries equals the European Gross Domestic Product (GDP).
Indirect added value and employment (i.e. added value and employment resulting from intermediary purchases with other sectors within the EU made by the maritime sectors) is in principal not taken into account in this study. The intermediate goods and services purchased by a maritime sector create economic activity in other sectors, which in turn create economic activity in other sectors, and so on. The sum of the economic activities created in those other sectors within the EU are the ‘indirect effects’ of that sector.

The added value data used in this study are very closely related to the collected employment data (see paragraph II.1). Eurostat’s data on added value per person employed in sectors with comparable NACE-codes have been used to translate employment figures to added value data in each of the maritime sectors. The NACE-classification which was used is based on the following categories, mainly resulting from the London-meeting of the European Network of Maritime Clusters (22 September 2006):

- **Shipping**: NACE 61.10 Sea and coastal water transport;
- **Shipbuilding**: NACE 35.11 Building and repairing of ships and NACE 35.12 Building and repairing of pleasure and sporting boats;
- **Marine equipment**: NACE 29.11 Manufacture of engines and turbines, except aircraft, vehicle and cycle engines; NACE 51.14 Agents involved in the sale of machinery, industrial equipment, ships and aircraft; NACE 51.65 Wholesale of other machinery for use in industry, trade and navigation; NACE 63.22 Other supporting water transport activities (partly);
- **Seaports**: NACE 63.11 Cargo handling (partly) and NACE 63.22 Other supporting water transport activities (partly);
- **Maritime services**: NACE 63.22 Other supporting water transport activities (partly);

A proximate figure based upon the earlier study *Policy Research (2001) – Economic impact of the maritime industries in Europe* is included in the report to provide a benchmark of the relative importance of the indirect effects.
– **Recreational boating**: NACE 71.22 Renting of water transport equipment;
– **Offshore services**: NACE 28.11 Manufacture of metal structures (partly) and NACE 63.22 Other supporting water transport activities (partly);
– **Navy**: NACE 75.22 Defence activities (partly);
– **Maritime works** and **Marine aggregates**: NACE 45.24 Construction of water projects (partly) and NACE 61.20 Other supporting water transport activities (partly);
– **Inland navigation**: NACE 61.20 Inland navigation;
– **Fishing**: NACE 05.01 Fishing and NACE 05.02 Fish farming (partly);
– **Coastal tourism**: NACE 55 Hotels and restaurants;
– **Cruise tourism**: NACE 55 Hotels and restaurants (partly) and NACE 61.10 Sea and coastal water transport (partly).

### II.3. **FINANCIAL INTER-SECTOR RELATIONS**

The financial inter-sector relations between the different sectors in a country’s maritime cluster have been based on an earlier study performed by *Policy Research* (The Economic Impact of the Dutch Maritime Cluster, 2006). With regard to that study, bottom-up data from all relevant maritime actors have been analysed through inquiries looking into, among others, financial inter-sector relations within the maritime cluster. The financial inter-sector relations resulting from this inquiry are provided in *Figure II.2*.

**Figure II.2**: Financial inter-sector relation in the Netherlands in 2006 (in € million)

To calculate inter-sector relations within all EU Member States and Norway, the Dutch maritime cluster’s inter-sector relations are analysed in relation to its sectors’ turnovers. For example, since the turnover of Dutch Navy amounts to €1 400 million, the financial flow of ‘Navy to ‘shipbuilding’ amounts to 10% of the turnover of Navy (= €145 million / €1 400 million). Based upon these percen-
tages of all Dutch maritime sectors, inter-sector relations within other European maritime clusters have been estimated.

To visualise the inter-sector relations the following thresholds are used:

- Mediate relation (+) implies a financial inter-sector relation of 2.5% to 7.5% of all inter-sector relations within a country;
- Strong relation (++) implies a financial inter-sector relation of 7.5% to 15% of all inter-sector relations within a country;
- Very strong relation (+++) implies a financial inter-sector relation of more than 15% of all inter-sector relations within a country.

The financial inter-sector relations are analysed for the top-10 countries in terms of employment and added value in all the maritime sectors.

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8 Top-10 countries in terms of employment and added value in all the sea-related sectors are Belgium, Denmark, France, Germany, Greece, Italy, the Netherlands, Norway, Poland, Spain, United Kingdom. Information available on demand.
III. **MEASURING CLUSTER STRENGTH BASED ON THE EUROPEAN CLUSTER OBSERVATORY’S STAR METHOD**

III.1. **STAR METHOD BASED ON THE METHODOLOGY OF THE STOCKHOLM SCHOOL OF ECONOMICS**

The amount and quality of knowledge circulating and spilling over between firms located in a cluster is dependent upon the cluster's size, the degree to which it is specialised and the extent to which the locality (the region) is geared towards and focused upon production in the relevant industries comprising the cluster. These three factors, size, specialisation and focus, reflect whether the cluster has reached 'specialised critical mass' to develop positive spill-overs and linkages. The European Cluster Observatory shows the extent to which clusters have achieved this specialised critical mass by employing measures of these three factors as described below, and assigning each cluster 0, 1, 2 or 3 'stars' depending on how many of the below criteria are met.

- **Size:** if employment reaches a sufficient share of total European employment, it is more likely that meaningful economic effects of clusters will be present. The ‘size’ measure shows whether a cluster is in the top 10% of all clusters in Europe within the same cluster category in terms of the number of employees. Those in the top 10% will receive a star.

- **Specialisation:** if a region is more specialised in a specific cluster category than the overall economy across all regions, this is likely to be an indication that the economic effects of the regional cluster have been strong enough to attract related economic activity from other regions to this location, and that spill-overs and linkages will be stronger. The 'specialisation' measure compares the proportion of employment in a cluster category in a region over the total employment in the same region, to the proportion of total European employment in that cluster category over total European employment. If a cluster category in a region has a specialisation quotient of 2 or more it receives a star.

- **Focus:** if a cluster accounts for a larger share of a region's overall employment, it is more likely that spill-over effects and linkages will actually occur instead of being drowned in the economic interaction of other parts of the regional economy. The 'focus' measure shows the extent to which the regional economy is focused upon the industries comprising the cluster category. This measure relates employment in the cluster to total employment in the region. The top 10% of clusters which account for the largest proportion of their region's total employment receive a star.

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*More information on the European Cluster Observatory is available on [www.clusterobservatory.eu](http://www.clusterobservatory.eu).*
III.2. REVIEW OF THE ‘SPECIALISATION’ AND ‘FOCUS’ STARS

Review of the Star Method points out that stars for ‘specialisation’ and stars for ‘focus’ are correlated. The constant factor $\mu$ is the European employment in a cluster category divided by total employment in Europe as shown in the following formulas, where $e_{r,s}$ represents employment in a region in the maritime cluster; $E_s$ represents European employment in the maritime cluster; $E_r$ represents total employment in the region; $E$ represents total employment in Europe.

\[
\text{Specialisation} \quad \frac{e_{r,s}}{E_s} = \frac{e_{r,s}}{E_r} \frac{E_s}{E_r} = \mu = \frac{e_{r,s}}{E_r}
\]

\[
\text{Focus} \quad \frac{e_{r,s}}{E_r} \quad \text{(top-10 percentile)}
\]

In Figure III.1 the linear relationship becomes apparent and illustrates the (linear) correlation between the values for ‘specialisation’ and ‘focus’ based on maritime employment in a selection of European regions. This linear line is a straight line with a slope of $E/E_s (=\mu)$.

**Figure III.1 : Values for ‘specialisation’ and ‘focus’ for a selection of regions**

The only difference between the stars for ‘specialisation’ and ‘focus’ in measuring cluster strength is the way a star is awarded. For ‘specialisation’ a regional cluster category needs to have a specialisation quotient of 2 or more to receive a star. For ‘focus’ a cluster category in a region must be in the top-10% of all European regions to receive a star. In Figure III.2 the correlation between the stars for specialisation (as defined in the existing Cluster Observatory methodology) and focus is clearly shown since a great number of regions are awarded both stars in the traditional maritime sectors (Area 1).
III.3. INTRODUCTION OF AN ‘ALTERNATIVE’ STAR FOR SPECIALISATION

In order to overcome correlation between the stars ‘specialisation’ and ‘focus’ and to provide a more profound basis for measuring cluster strength a new star has been introduced in the underlying study. This ‘alternative’ star, replacing the European Cluster Observatory’s specialisation star, starts from a Specialisation Index (SI). If a region’s Specialisation Index is in the top-10% of all European regions, the region receives a star.

The Specialisation Index, which shows similarities with the Herfindahl-Hirschman Index (used to measure the amount of competitiveness), is defined as the sum of the squares of all sector-shares in terms of employment and/or added values for all sectors within a cluster. When $M_{r,s} = \frac{e_{r,s}}{E_s}$ is the relative sector-share in region $r$ for sector $s$, the index for the cluster in that region $r$ equals:

$$SI_r = \sum_{s=1}^{C} \left( \frac{e_{r,s}}{E_s} \right)^2$$

With $C = \text{number of sectors in the cluster (C} \geq 2)$$^{10}$

$e_{r,s} = \text{employment in sector } s \text{ in region } r$

$E_s = \text{European employment in sector } s$

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$^{10}$ The number of sectors in a cluster (C) must be greater or equal than two to avoid correlation between the star for size and the star for specialisation.
The specialisation per region (country) takes into account both the employment or value added spread of a region (country) over sectors as well as the relative position of the region within Europe. By adding up over the sectors the squares\(^\text{11}\) of the market shares of a region in the respective cluster category, a single value results that indicates the relative strength of a region in the sectors constituting the cluster. A region with relative strong sectors on European level will consequently receive an ‘alternative’ non-correlated star for specialisation.

As an example on how to calculate the Specialisation Index consider the situation of twenty-eight regions (EU-27 and Norway) and ten sectors (Area 1: traditional maritime sectors) with the market shares (in terms of employment) as depicted in Table III.1. The Specialisation Index for France, for example, is calculated as follows: \((13\%)^2+(10\%)^2+(15\%)^2+(6\%)^2+(8\%)^2+(16\%)^2+(17\%)^2+(18\%)^2+(9\%)^2\) =17\%. The key ‘specialisation’ regions (countries in this example) that result from this analysis are Germany, France, Italy, Netherlands, and the UK. When comparing different clusters throughout Europe, the sum of the Specialisation Indexes over the regions is a single value that provides a basis for the different levels of specialisation of these clusters.

Table III.1 : Calculation of the Specialisation Index

<table>
<thead>
<tr>
<th></th>
<th>Shipbuilding</th>
<th>Marine equipment</th>
<th>Shipping</th>
<th>Recreational boating</th>
<th>Maritime services</th>
<th>Navy</th>
<th>Offshore supply</th>
<th>Total Specialisation Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>at</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
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<td>0%</td>
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Source: Policy Research Corporation

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\(^11\) To maximise strong sector shares and to minimise small sector shares, these are squared.
IV. RESPONDENTS TO THE QUESTIONNAIRE

The questionnaire which is enclosed as Annex and which was used to assess the role of maritime cluster organisations (Task 2) was sent to about 35 key players in the European maritime sectors. As shown in Table IV.1, the ‘key’ national cluster organisations received a questionnaire as well as a selection of regional cluster organisations and European sector associations. The latter however indicated that they do not see themselves as cluster organisations and the results of their questionnaire have been treated accordingly.

**Table IV.1 : Overview of the inquired maritime organisations**

<table>
<thead>
<tr>
<th>Cluster organisation</th>
<th>National level</th>
<th>Regional level</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENMC - European Network of Maritime Clusters</td>
<td>Association of Finnish Maritime Industries (FI)</td>
<td>Haven Gateway Public/Private Partnership (UK)</td>
</tr>
<tr>
<td>MIF - Maritime Industries Forum</td>
<td>Bundesministerium für Wirtschaft und Technologie (DE)</td>
<td>London Maritime (UK)</td>
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<tr>
<td>Aquamarina</td>
<td>Cluster Maritime Français (FR)</td>
<td>Maritime Cluster in Schleswig-Holstein (DE)</td>
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<td></td>
<td>Cluster Maritime España (ES)</td>
<td>Maritime Moreyside (UK)</td>
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<td></td>
<td>Danish Maritime Authority / Maritime Development Centre of Europe</td>
<td>Maritime South West (UK)</td>
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<td>Dutch Maritime Network (NL)</td>
<td>Maritime South East (UK)</td>
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<td></td>
<td>Federazione del Mare (IT)</td>
<td>Maritime Forum Bergen (NO)</td>
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<td>Maritime Forum (SE)</td>
<td>Maritime Forum Haugalandet og Sunnhordland (NO)</td>
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<td>Maritime Forum (NO)</td>
<td>Maritime Forum South East (NO)</td>
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<td>MARUT (NO)</td>
<td>Oslo Maritime Network</td>
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<td></td>
<td>Poliar Maritime Network Institute (PL)</td>
<td>Pôle Mer Bretagne</td>
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<td></td>
<td>The Chamber of Shipping (UK)</td>
<td>Pôle Mer Provence, Alpes, Côte d’Azur</td>
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<thead>
<tr>
<th>Sector association</th>
<th>European level</th>
<th>National level</th>
</tr>
</thead>
<tbody>
<tr>
<td>CESA - Community of European Shipyards Associations</td>
<td></td>
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<tr>
<td>ECNI - European Confederation of Nautical Industries</td>
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<tr>
<td>ECSA - European Community Shipowner’s Associations</td>
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<td>EMEC - European Marine Equipment Council</td>
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<td>ESPO - European Sea Ports Association</td>
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*Source : Policy Research Corporation*
ANNEX: QUESTIONNAIRE

Identification

Name of the organisation:

Contact person (full name):

Contact details:
  Address:

  Telephone number:

  E-mail:
Section I – Scope of the maritime cluster you represent

1. What is the presence of the maritime cluster in your country or region?

a) Which of the following sectors are present in your country/region?

- [ ] Shipping
- [ ] Shipbuilding
- [ ] Marine equipment
- [ ] Seaports
- [ ] Maritime services
- [ ] Coastal tourism and recreation
- [ ] Offshore oil and gas
- [ ] Exploitation of non-living sea resources (other)
- [ ] Recreational vessels and services
- [ ] Offshore supply
- [ ] Navy and coastguard
- [ ] Inland Waterways
- [ ] Maritime works
- [ ] Fisheries and related activities
- [ ] Offshore renewable energy
- [ ] Other sectors: (please specify)

b) Which of the following sectors are members/participate in your cluster organisation:

- [ ] Shipping
- [ ] Shipbuilding
- [ ] Marine equipment
- [ ] Seaports
- [ ] Maritime services
- [ ] Coastal tourism and recreation
- [ ] Offshore oil and gas
- [ ] Exploitation of non-living sea resources (other)
- [ ] Recreational vessels and services
- [ ] Offshore supply
- [ ] Navy and coastguard
- [ ] Inland Waterways
- [ ] Maritime works
- [ ] Fisheries and related activities
- [ ] Offshore renewable energy
- [ ] Other sectors: (please specify)

c) What geographic territory does your maritime cluster cover?

- [ ] National coverage
- [ ] Region (NUTS\(^2\) level 1, 2 or 3):

2. What statistical classification is used to define these maritime sectors and what are the available data and research studies?

a. On which base are these maritime sectors defined?

- [ ] Other:

---

\(^1\) Nuts: Nomenclature of Territorial Units for Statistics.

\(^2\) See [http://ec.europa.eu/comm/competition/mergers/cases/index/nace_all.html](http://ec.europa.eu/comm/competition/mergers/cases/index/nace_all.html) for an overview of the NACE codes.
b. Are these sectors statistically monitored (number of companies, economic key indicators) and, if so, by whom?

☐ Yes, by
☐ No

c. Which sector or cluster studies are publicly available or can be made available to the project team?

(specify)

3. Which formal or informal organisations besides yours represent (a sector of) your maritime cluster:

a. National organisations? (specify + please provide contact person)

b. Regional organisations? (specify + please provide contact person)

Section II - Structure of your maritime cluster organisation

4. When, by whom and why was your organisation founded?

a. When? (specify)

b. By whom?

(private person, public or private organisation)

(specify)

c. How would you describe the way your organisation was set-up and developed?

☐ Top-down (government driven)
☐ Bottom-up (sector driven)

d. Why was it founded?

(specify)

5. What is the mission of your organisation?

(please use numbers in the boxes to rank the activities in terms of importance (whereby highest importance should be ranked one)

☐ Enhance the competitiveness of the maritime businesses in your cluster
☐ Promote research and technologic development and use of knowledge for innovation
☐ Provide statistical and economical data
Create a level playing field for maritime sectors
Promote opportunities for maritime companies to cooperate among each other
Promote opportunities for maritime companies to network with other organisations
Allocate public funding to maritime sectors
Protect sector interests
Other: (specify)

6. What does your organisation do in support of this mission?
   a. Type of activities?
      □ Framework measures
      □ Data and information sharing
      □ Meetings/events
      □ Representation of businesses in public initiatives, e.g. spatial planning
      □ Lobbying
      □ Policy initiatives
      □ Projects/studies
      □ Acquisition of grants/funds
      □ Publicity/promotion
      □ Other: (specify)

   b. Topics covered?
      □ Labour
      □ Innovation and research
      □ Internationalisation
      □ Image building/marketing
      □ Environmental performance
      □ Know-how
      □ Level playing field
      □ Finance
      □ Business development
      □ Other: (specify)

7. What is the formal structure of your organisation?
   (specify)

8. How many staff works in your organisation?
   a. In number of persons:
b. In FTE (full time equivalents):

9. **How is your organisation financed?**
   (specify)

   a. **What is your annual budget (and currency)?**
      (specify)

      i. **What types of funding contribute to the annual budget and in which proportion?**
         - Public funding: \( % \)
         - Private funding: \( % \)
         - Member contributions: \( % \)
         - Own resources from activities (specify): \( % \)
         - Other (specify): \( % \)

      ii. **How have these developed over the years?**
          (specify)

   b. **To which activity and in what proportion is your budget allocated?**
      - Framework measures: \( % \)
      - Data and information sharing: \( % \)
      - Meetings/events: \( % \)
      - Representation of businesses in public initiatives: \( % \)
      - Lobbying: \( % \)
      - Policy initiatives: \( % \)
      - Projects/studies: \( % \)
      - Acquisition of grants/funds: \( % \)
      - Publicity/promotion: \( % \)
      - Office management: \( % \)
10. What type of parties are directly involved in your organisation?
   - Private companies
   - Government
   - Other: (specify)
   - Sector associations
   - Private persons

11. Which other maritime parties do you cooperate with?
   - Private companies
   - Government
   - Research institutes
   - Other: (specify)
   - Private persons
   - Sector associations

12. Which non-maritime parties do you cooperate with?
   - Private companies
   - Government
   - Research institutes
   - Other: (specify)
   - Private persons
   - Sector associations

13. Does your organisation cooperate with other maritime clusters?
   - No
   - Yes
   a. With which parties?
      - European maritime cluster organisations
      - National maritime cluster organisations
      - Regional maritime cluster organisations
      - Non-European maritime cluster organisations
      - European sector associations
      - National sector associations
      - Regional sector associations
      - Non-European sector associations
      - Other international organisations or associations: (specify)
   b. On what subjects?
      - Data and information sharing
      - Meetings/events
      - Policy initiatives
      - Projects/studies
      - Publicity/promotion
Lessons learned and best practices
Other: (specify)

14. Which future cooperation would your maritime cluster organisation consider engaging in? (specify)

15. What are your organisations’ expectations concerning cooperation at European level between maritime cluster organisations? (specify)

**Importance of maritime cluster organisations**

16. What are, according to you, the most important strengths and weaknesses:
   a. Of your maritime cluster?
      i. Strengths?
         (specify)

      ii. Weaknesses?
         (specify)

17. Which opportunities and threats do you see for the development of your maritime cluster?
   i. Opportunities
      (specify)
   ii. Threats
      (specify)

**Section III - Evaluation and assessment of performance**

18. Is your maritime cluster organisation and/or its involvement in the maritime industries subject to evaluation on a regular basis, and if so, by whom and with which (possible) implications?
   □ No
   □ Yes
   a. By whom?
Overview of the applied research methodology

☐ Private companies ☐ Private persons
☐ Government ☐ National sector associations
☐ European sector associations ☐ Research institutes
☐ Other: (specify)

b. For which reasons?
☐ Structural

On which basis? (specify) More than once every year
☐ On project basis
☐ Other: (specify)

c. With implications on which domains?
☐ Funding
☐ Existence
☐ No implications
☐ Other: (specify)

19. Please provide details on main results from cluster activities/assessments
☐ Project results: (specify)
☐ Evaluation reports: (specify)
☐ Other: (specify)

20. What role do you see for your cluster organisation in further developing the European Maritime Policy\(^{14}\) especially with regard to cross-cutting policy tools as described in section 3 of the Action Plan\(^{15}\)?

(specify)


\(^{15}\) Notably as users or information providers to a Marine Data and Observation network or in coordinating business perspectives in maritime spatial planning (see sections 3.2 and 3.3 of the Action plan (see footnote above).