

Cluster Marítimo Español

Competitiveness , Cooperation & Communication



CLUSTER
MARTIMO
ESPAÑOL

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General Manager

Secretariat of the SPANISH MARITIME CLUSTER

Rome, September 30 - 2008



Cluster Marítimo Español

The meeting point of the Spanish maritime sector

The largest industrial cluster in terms of output and employment

A common horizon for Spanish maritime industries and services

Synergies produced by many guarantee the future for all



Principles of the Spanish Maritime Cluster



Formation of the Spanish Maritime Cluster has been based on the following **key requirements**:

- To stimulate the **promotion and defence of the common interests** of the industry in Europe.

To respond to the new European Maritime Policy (Blue Paper), which supports the development of Clusters as a means to improve competitiveness, and the creation of a European Network of Maritime Clusters.

- To **reinforce the presence and visibility of our industries in international markets** and to develop a reinforced brand **image** as a **maritime country**.
- To integrate as many maritime industry activities as possible, seeking to **improve the critical mass and to make use of synergies**.
- To promote **the strategic nature of the maritime sector** to society, due to its capacity to **contribute to sustainable growth and job creation in the economy**.



Principles of the Spanish Maritime Cluster



The Spanish Maritime Cluster must:

1. **Promote competitiveness and growth in the sector**
 - encourage cooperation: industrial, commercial and technological
 - favour internationalisation
 - promote the image of the sector nationally and internationally
2. Be recognised by public and private institutions as an **organisation that brings together all the representatives of the Spanish maritime sector** and, in particular, its facet of contributing to the progress and improved competitiveness of companies in the Spanish maritime sector
3. Be seen as an **organisation committed to social and economic development**, as well as to environmental sustainability in Spain.



Why?



For reasons of Timeliness

- Harmonising with the **European Maritime Policy** (Blue Paper) and participating in the “**European Network of Maritime Clusters**” project.
- Coordinating and unifying the **activities of mutual interest** for the sector (Technological Platform of the Maritime Sector, internationalisation of the sector, brand image, etc.).

For reasons based on Sector Demand

- Integrating as many Maritime Sector activities as possible, seeking **critical mass** (GDP).
- Unifying the sector for a better **promotion and defence, of common interests**.
- Increasing capabilities for the optimisation of **synergies**.
- Raising the **international profile** of the Spanish maritime sector.

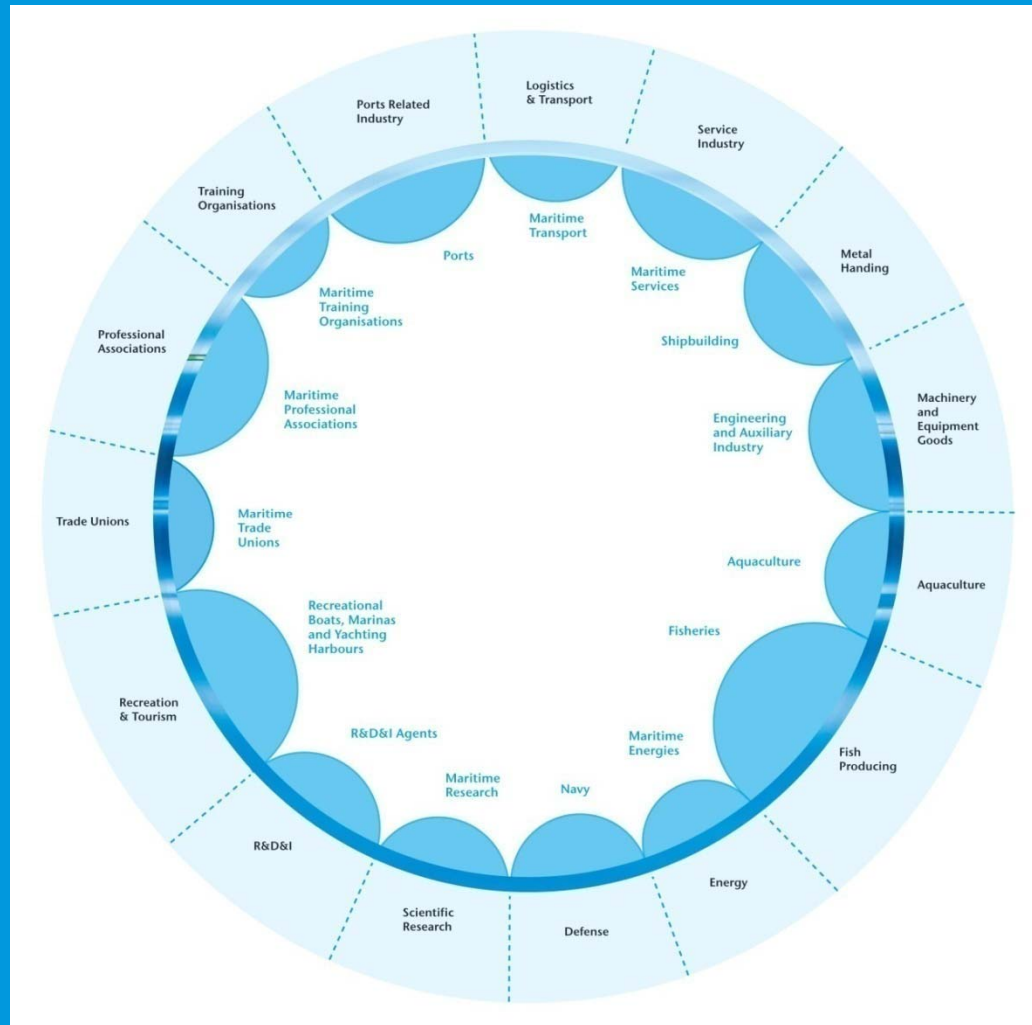
For reasons relating to Building the Future

- Reinforcing the **strategic nature** of the maritime sector.
- Halting the fragmentation of the sector.



Spanish Maritime Activities

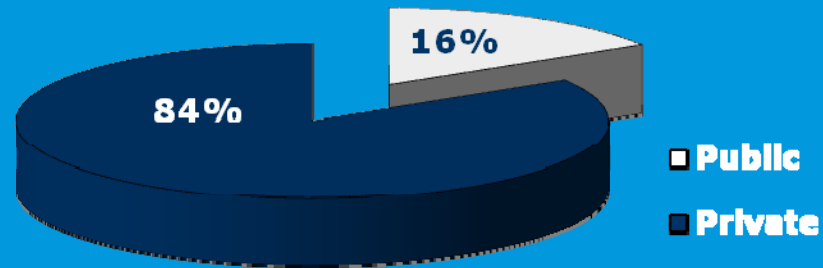
The meeting point of the Spanish maritime sector





Members & Associates

Synergies produced by many guarantee the future for all



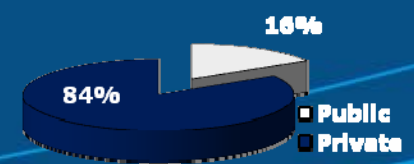
36 Private institutions and companies

7 Public institutions and companies



Members & Associates

Synergies produced by many guarantee the future for all

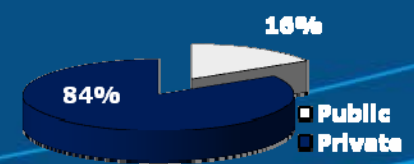


Subsector	Members
Maritime Transport	<ul style="list-style-type: none"> • Acciona Transmediterránea • Asociación de Navieros Españoles (ANAVE)* • Flota Suardiaz • Knutsen OAS España, S.L. • W.W. Marpetrol, S.A.
Ports	<ul style="list-style-type: none"> • Puertos del Estado • Fundación Valenciaport
Shipbuilding	<ul style="list-style-type: none"> • Construcciones Navales del Norte S.L., La Naval • Hijos de J. Barreras, S.L. • Pequeños y Medianos Astilleros (PYMAR)* • Unión Española de Construcciones Navales (UNINAVE)* • Unión Naval de Valencia • Gerencia del Sector Naval (GSN)*
Engineering and Auxiliary Industry	<ul style="list-style-type: none"> • Ghesa Andalucía • Grupo Arbulu • Indra • Sener Ingeniería y Sistemas, S.A.
* Founder members	



Members & Associates

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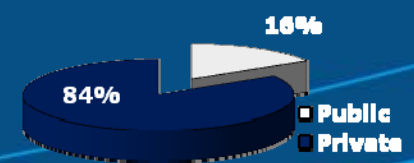
Subsector	Members
Aquaculture	<ul style="list-style-type: none"> • Apromar
Recreational Boats, Marinas and Yachting Harbours	<ul style="list-style-type: none"> • Asoc. Nacional de Empresas Náuticas (ANEN)*
Maritime Research	<ul style="list-style-type: none"> • Instituto Español de oceanografía (IEO)*
Training Organisations and Professional Associations	<ul style="list-style-type: none"> • Asociación Ingenieros Navales de España (AINE)* • Universidad Politécnica de Madrid (UPM) • Instituto Marítimo Español (IME)
Regional Clusters	<ul style="list-style-type: none"> • Asoc. Centro Tecnológico Naval y del Mar (CTN)* • Asoc. Clúster del Naval Gallego (ACLUNAGA)* • Clúster Marítimo de Canarias (CMC)* • Foro Marítimo Vasco (FMV)* • Inst. De Desarrollo Económico del Principado de Asturias (IDEPA)*

* Founder members



Members & Associates

Synergies produced by many guarantee the future for all



Subsector	Members
R&D and Innovation Agents	<ul style="list-style-type: none"> • Canal de Experiencias Hidrodinámicas del Pardo (CEHIPAR)* • Centro Tecnológico LEITAT • Fundación Innovamar* • Inasmet- Tecnalia
Trade Unions	<ul style="list-style-type: none"> • Metal, Construcción y Afines de UGT, Federación Estatal (MCA-UGT)* • Federación Minero-metalúrgica de CCOO*
Maritime Services	<ul style="list-style-type: none"> • Auren Auditores y Consultores, S.A. • Clifford Chance • Grupo Santander • Lovells LLP • NAVALIA (Muéstralo, S.L.) • SINAVAL/ Eurofishing (Bilbao Exhibition Centre)
Culture, Cultural Heritage and Social Welfare	<ul style="list-style-type: none"> • Fundación Aulamar • Fundación Un Mar Sin Barreras • Real Fundación Hispania de Barcos de Época
* Founder members	



Economic impact of the sector

The largest industrial cluster in terms of output and employment



Total economic impact of the maritime sector on the Spanish economy

	GDP (%)	GDP (millions of euros)	Employment (%)	Employment (n° of employees)
Direct effect	3,2	26.245	2,3	456.170
Indirect Effect	2,9	24.041	2,5	500.000
Induced Effect	1,0	8.224	1,0	191.000
Total Effect	7,2	58.511	5,8	1.147.000

Source: Independently produced on the basis of the National Institute of Statistics' input-output framework for the year 2000.

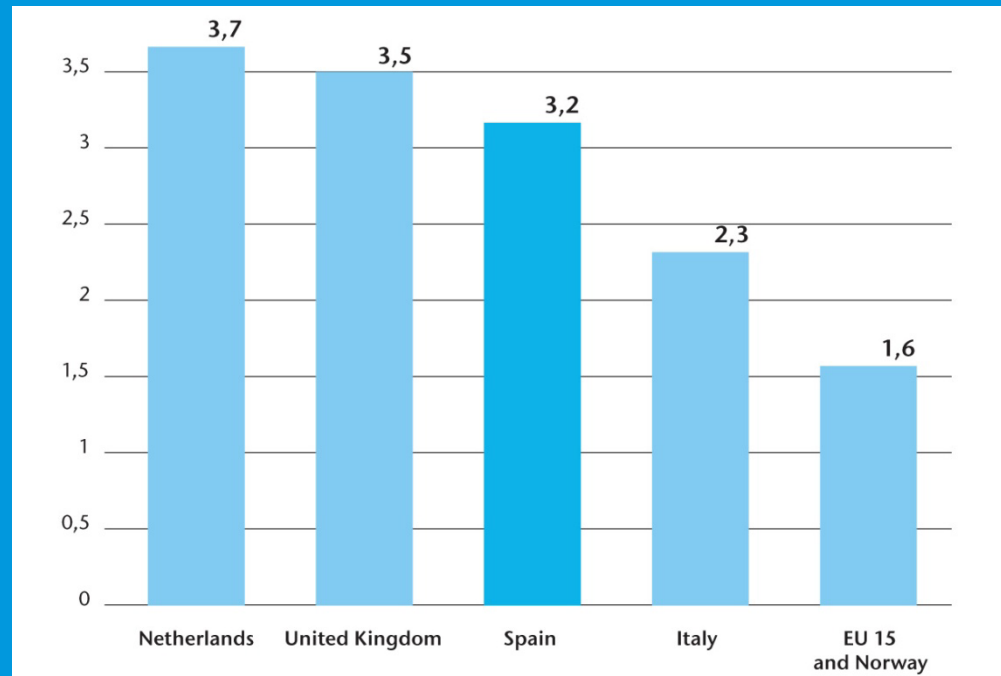


Economic impact of the sector

The largest industrial cluster in terms of output and employment

In terms of the maritime sector's contribution to the national GDP, the industry in Spain is in a **leading position** compared with parallel estimates in other European countries.

Direct effect	
GDP	3,2%
	26.245 millions of euros
Employment	2,3%
	456.170 employees



Source: Independently produced on the basis of the National Institute of Statistics' input-output framework for the year 2000.



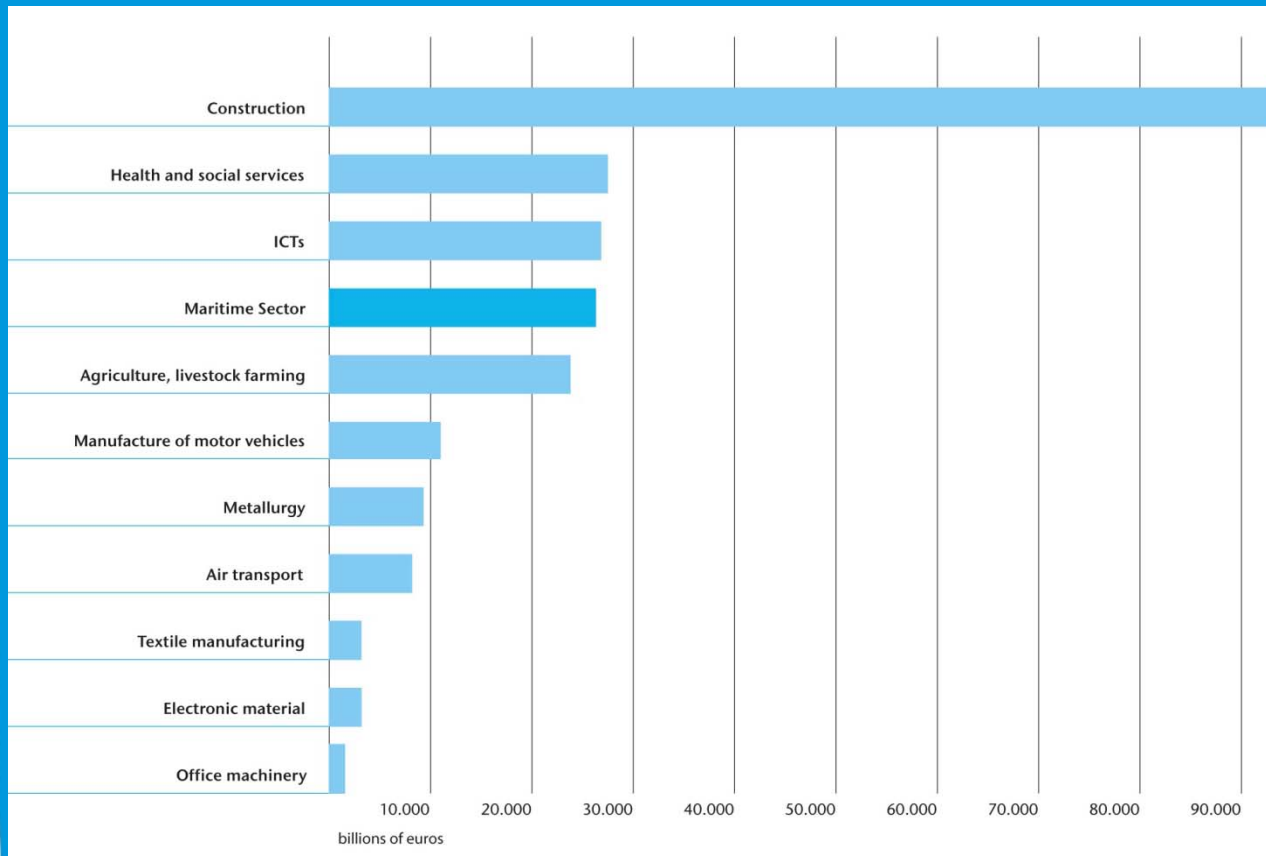
Economic impact of the sector

The largest industrial cluster in terms of output and employment

Direct effect	
GDP	3,2%
	26.245 millions of euros
Employment	2,3%
	456.170 employees

Comparison with other productive sectors

GDP (millions of euros):



The aggregate maritime sector is larger than any other industrial sector and **similar to the ICT sector**.

Source: Independently produced on the basis of the National Institute of Statistics' input-output framework for the year 2000 / DigiWorld 2007 Spain.



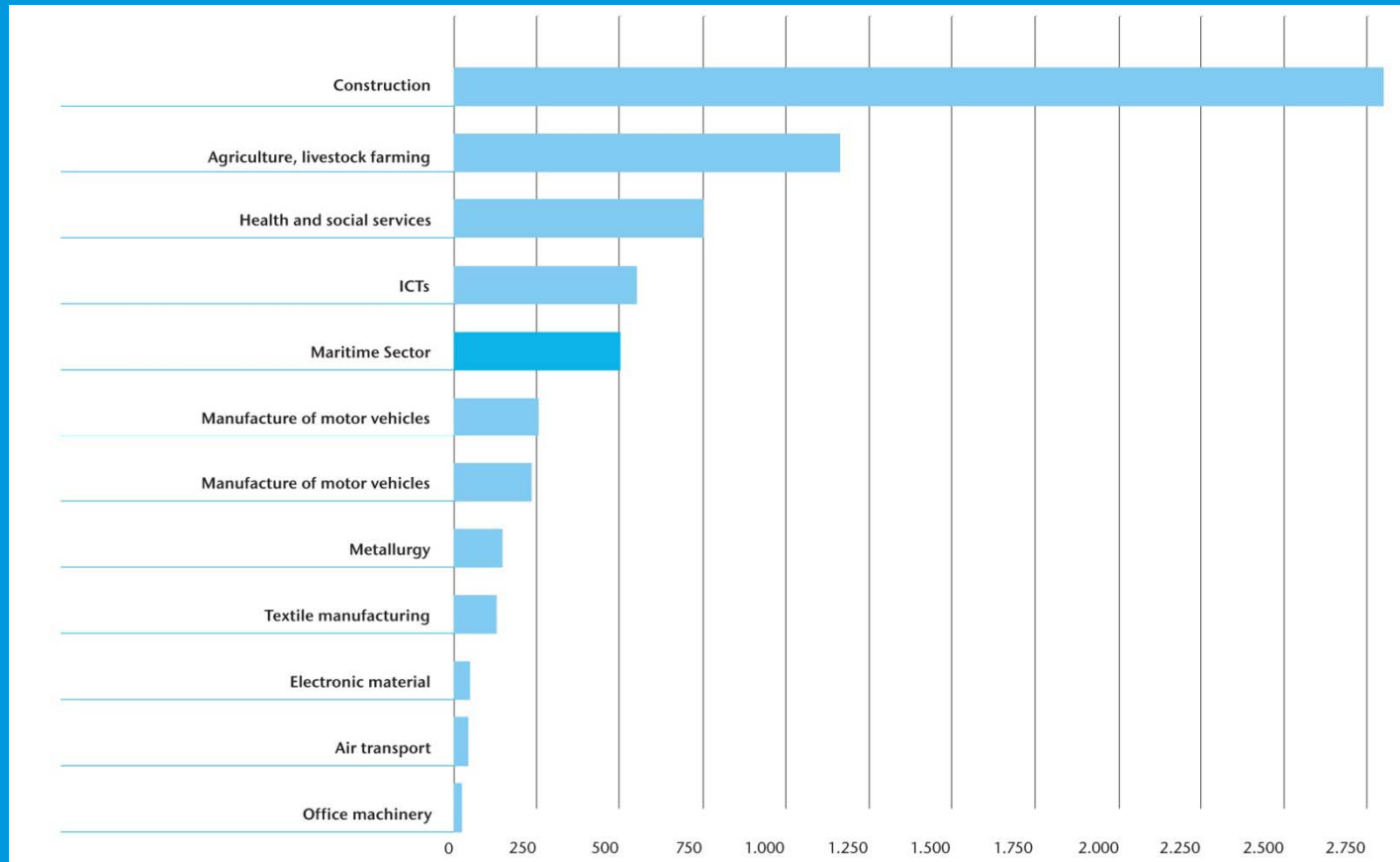
Economic impact of the sector

The largest industrial cluster in terms of output and employment

Comparison with other productive sectors

Employment (thousands of jobs)

Direct effect	
GDP	3,2%
	26.245 millions of euros
Employment	2,3%
	456.170 employees



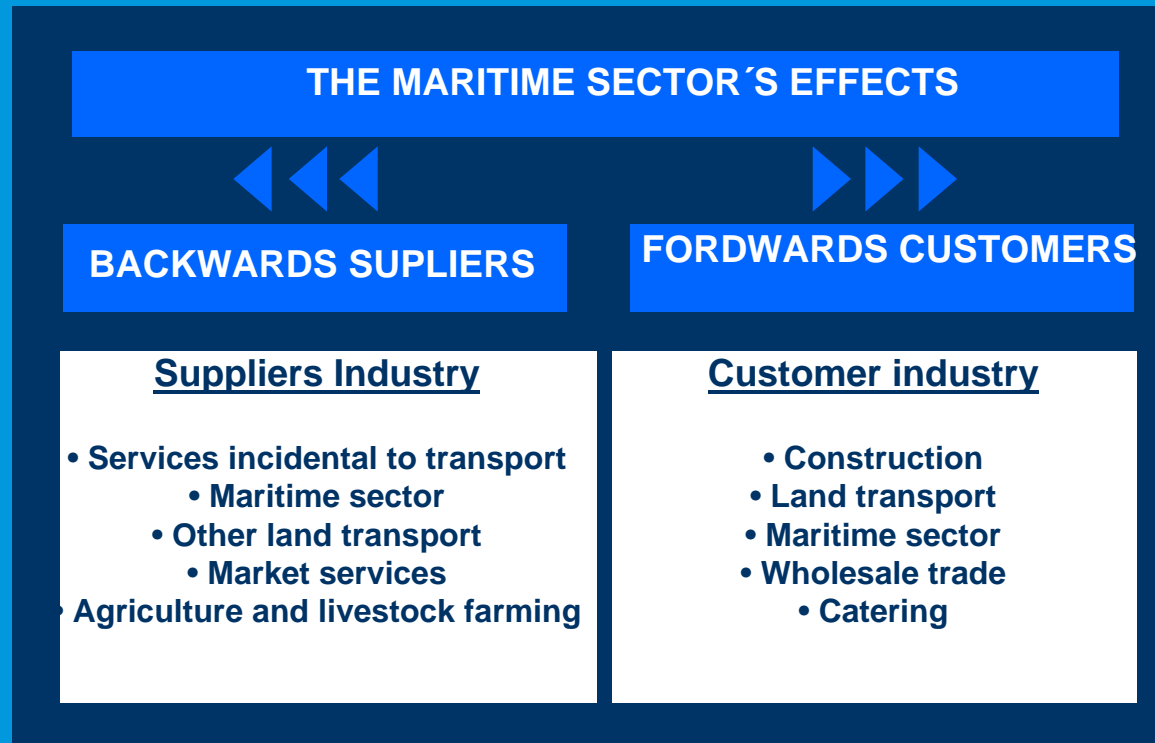
Source: Independently produced on the basis of the National Institute of Statistics' input-output framework for the year 2000 / DigiWorld 2007 Spain.



Economic impact of the sector

The largest industrial cluster in terms of output and employment

Due to the relations with its supplier and customer sectors, the maritime sector has certain drag effects.





Economic impact of the sector

The largest industrial cluster in terms of output and employment

Multipliers

Year 2005	Effective output (millions of euros)	GVA (millions of euros)	Total Employment (equivalent full-time employees)
Total (sum of all the effects)	153.836	58.511	1.147.406
Multipliers	3,01	2,23	2,52

Source: Independently produced on the basis of the National Institute of Statistics' input-output framework for the year 2000 / DigiWorld 2007 Spain.



Economic impact of the sector

The largest industrial cluster in terms of output and employment

Multipliers (Subsectors)

Year 2005	Effective output (millions of euros)	GVA (millions of euros)	Total Employment (equivalent full-time employees)
Fisheries	2,94	2,03	1,57
Shipbuilding	3,94	4,45	2,89
Maritime Transport	3,26	2,92	4,06
Nautical sports and recreational sailing	3,58	5,24	7,59
The rest of the subsectors	2,92	2,12	2,60
Maritime Sector	3,01	2,23	2,52

Source: Independently produced on the basis of the National Institute of Statistics' input-output framework for the year 2000 / DigiWorld 2007 Spain.



Strategic Plan 2008-2011

The SMC's vision:

To promote the **development of the maritime industry** in order to facilitate **sustainable growth, technological modernisation and internationalisation.**

The SMC's mission:

This is composed of three main elements:

- **Reinforcing the competitiveness** of the Spanish maritime industry **and integrating it into the "European Network of Maritime Clusters"** project.
- **Encouraging cooperation and participation** in activities of common interests for the industry.
- **Communicating.**



The **central philosophy** of the Spanish Maritime Cluster is aimed at promotion of the industry in Spain through the three Cs:

- **Competitiveness**
- **Cooperation**
- **Communication**



Strategic Plan 2008-2011

Main Targets



The **main objective** of the SMC is to **encourage competitiveness** in the Spanish Maritime Cluster by **combining the interests and knowledge of Spanish companies and institutions** with the aim of achieving **industry growth, increased profitability and greater presence and rate of growth.**

The **general objectives** of the SMC are also:

1. To create **wealth and welfare for society**
2. To seek **business excellence** in the Spanish maritime sector
3. To increase the **competitiveness** of Spanish companies in the global market
4. To improve the **efficiency** of the companies' industrial and commercial management
5. To promote the professional **development of employees**



Strategic Plan 2008-2011

Strategic Axes



5 strategic axes have been defined to meet the objectives of the Spanish Maritime Cluster:

AXIS 1: COMPETITIVENESS

AXIS 2: INTERNATIONAL PROJECTION

AXIS 3: TRAINING

AXIS 4: TECHNOLOGY – INNOVATION

AXIS 5 : SOCIETY & IMAGE



Strategic Plan 2008-2011

Strategic Axes



AXIS 1: COMPETITIVENESS

Keys:

- **Promoting a European Maritime Policy** aimed at ensuring the international competitiveness of companies from EU member countries.
- Recommending Spanish maritime industry initiatives of a horizontal nature with the aim of **reinforcing the competitiveness of our companies and industries.**
- **Encouraging the formation of Regional Maritime Clusters** that can identify and group together common interests in order to respond to maritime industry competitiveness challenges in each region.
- **Promoting communication between SMC members** to thereby favour the use of synergies and common activities between the different industries that make up the Cluster.



Strategic Plan 2008-2011

Strategic Axes



AXIS 2: INTERNACIONAL PROJECTION

Keys:

- Promoting a brand image of the **Spanish maritime industry** as an **international reference in technology and products**.
- Encouraging the **presence of the maritime industry abroad** through participation in forums, events and markets, improving existing access channels to these, where applicable, or creating other new ones



Strategic Plan 2008-2011

Strategic Axes



AXIS 3: TRAINING

Keys:

- Encouraging development and knowledge about **professional opportunities** in the industry.
- Promoting **careers** for young people.
- Coordinating and improving the **academic and permanent training** of maritime professionals
- Facilitating the **movement of professionals between sub-sectors and maritime activities.**



Strategic Plan 2008-2011

Strategic Axes



AXIS 4: TECHNOLOGY- INNOVATION

Keys:

- Stimulating the **technological development of the industry** by supporting and collaborating in activities related to Maritime and Fishing Industry Technological Platforms
- Promoting the **cooperation and use of synergies with respect to Innovation and Technology** in the maritime industry.
- Promoting the **participation of the Spanish maritime industry in technological cooperation projects internationally**, and especially in the European Framework Programme.

The EMC recognises the INNOVAMAR Foundation as a reference body in revitalizing and promoting RDI.



Strategic Plan 2008-2011

Strategic Axes



AXIS 5: SOCIETY & IMAGE

Keys:

- Achieving **recognition of the economic importance** of the Spanish Maritime Industry and its contribution to quality of life, employment and sustainable growth.
- Reaffirming the **identity and historical maritime tradition** of Spain.
- Supporting industry in actions aimed at reinforcing **corporate social responsibility**.



Strategic Plan 2008-2011

WORKING GROUPS



STRATEGIC AXIS	WORKING GROUPS
COMPETITIVENESS	<ul style="list-style-type: none">•European Maritime Policy•Rules and Legislation•Growth Action Plan•Regional Clusters•Integral Management of Coastlines and Marine Environment.
INTERNATIONAL PROJECTION	<ul style="list-style-type: none">• Internacional projection
TRAINING	<ul style="list-style-type: none">•Training Routes•Encouraging New Maritime Careers.•Occupational Risk Prevention (ORP)•Permanent training
TECHNOLOGY – INNOVATION	<ul style="list-style-type: none">•Technological Platform•Marine energy sources, reducing emissions and energy efficiency
SOCIETY & IMAGE	<ul style="list-style-type: none">•Maritime Heritage Restoration•Female Equality•Aularmar Without Barriers•Communication•Social Welfare



WebSite



www.clustermaritimo.es

CLUSTER MARITIMO ESPAÑOL

Acceso Socios
Usuario:
Contraseña:

Rss

El punto de encuentro del Sector Marítimo de España

25 / 09 / 2008 13:16:57

CLUSTER MARITIMO ESPAÑOL

Principal

- Quiénes somos
- Ejes estratégicos
- Entidades Participantes
- Relaciones
- El Sector Marítimo español
- Radiografía de sus actividades
- Adherirse al Cluster
- Grupos de trabajo
- Contactar
- Acceso Área de trabajo
- Acceso Socios
- Centro de Información
- Noticias
- Agenda
- Enlaces

Secretaría Técnica

Ejes Estratégicos

Eje 1 Competitividad	Eje 2 Proyección Internacional	Eje 3 Impulso a la formación	Eje 4 Tecnología e Innovación	Eje 5 Sociedad e Imagen
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Destacado

3ª ASAMBLEA GENERAL DEL C.M.E. - 29 de Septiembre de 2008
19/09/2008
Aplazamiento de la 3ª Asamblea General del CME al 29 de septiembre, en la que se procederá a la elección del nuevo Presidente.
[Más Información](#)

CENSO ELECTORAL 2008
18/09/2008
Publicación del Censo Electoral 2008
[Más Información](#)

Si desea adherirse al cluster, por favor pulse en el siguiente enlace

Centro de Información

- LIBRO AZUL**
"The blue Book": An Integrated Maritime Policy for the European Union, Brussels, 10 October 2007
[Ver más](#)

Agenda

Septiembre 2008

Internet | Modo protegido: ac



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