8th IMP-MED Project Technical Regional Workshop
(Brussels, 21 October 2014)

7th Meeting of the Working Group on IMP in the Mediterranean
(Brussels, 21-22 October 2014)

Case Study 1:

National Maritime Clusters in Algeria and Tunisia [1]

Introduction

*"Industry and employers' representatives, civil society, academia, and training institutes could be more engaged in the overall governance of marine and maritime activities in the region. **Maritime clusters are useful platforms for multi-stakeholder involvement**."*
(12th FEMIP Conference 18 - 19 April 2012)

In the framework of IMP-MED Phase II, Algeria and Tunisia requested Technical Assistance from the Project to identify the potential relevance and benefits of a National Maritime Cluster that could represent as many maritime and marine sectors as possible, and to assess the interest of concerned stakeholders in getting involved in the development of the Cluster.

As a preliminary step, tailored meetings were held in Tunisia and Algeria in the context of the National IMP Workshops of each Country to inform the representatives of all sectors about the "Maritime Cluster" concept and present the current experience worldwide and particularly in the EU. As a result of these meetings, it was decided to undertake a study on the feasibility of creating a national Cluster in both countries.

Project deliverables

The IMP-MED project produced a study for each country including:

- an analysis of the result of the questionnaire survey conducted within Ministerial departments and other public institutions, professional organizations and firms representing all maritime sectors and activities;

- a comparative analysis (benchmark) of National Maritime Clusters (mainly in the EU), describing their main characteristics, objectives, membership, activities, organization, etc. in an effort to provided best practice guidance to the interested stakeholders.

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[1] This document has been prepared as part of the EU-funded Project - Integrated Maritime Policy for the Mediterranean (IMP-MED), led by WS Atkins International Limited and cannot be taken to reflect the views of the European Union.

Outcomes

The reconciliation of these two exercises as well as related discussions during the National Workshops led to the common conclusion that almost all stakeholders recognise the added value of the "Maritime Cluster" approach and would potentially adhere to a national cluster in consideration of the opportunities that such a (light) organization would bring to themselves and to the wider national maritime community.

Despite some uncertainties regarding the cluster "model" that should be adopted in the context of each country, the study provided the opportunity to identify clear indications on each sectors' expectations and ideas in terms of objective, activities, organisation and financing.

Recommendations

The recommendations left with the national coordinators in the two Countries, indicate that a series of issues needs to be addressed before the national clusters can be concretely set up:

- formalise and share the objectives of the Cluster among the potential members
- ensure balance in the representation of sectors and activities
- clarify the respective role of private and public sectors
- select the most suited organisational scheme for the country
- evaluate private vs. public funding options

More detailed recommendations on the basis of the surveys' results are provided in Annex I.

The template of the questionnaire used for the surveys in Algeria and Tunisia can be found in Annex II.

ANNEX I

Outcomes	Possible activities
1. Interest for cluster	
• The setting-up of national maritime cluster is of great interest for entities consulted	• Feedback from questionnaire are used to clarify the interest and the expectations • Encourage non-respondents by providing the outputs of the meeting of June 2014

• Respond to information and clarification request should be considered a prerequisite for many respondents	• Prepare a « cluster » report and address to :
	  - all entities responded to the questionnaire and all participants of the project meeting
	  - stakeholders not involved in the preparatory activities (awareness, survey)

2. Expectations / Opportunities	

• All the axes proposed in the questionnaire are considered significant for the great majority of the responses:
  - Intra-cluster
  - Synergies
  - Fostering activities at nat. / int. level
	• Promote exchanges between inter-sectorial projects
	• Identify means to promote

• Responses have identified the most requested interrelations by all sectors represented	• Favour general or specific relations through information, communication and promotion tools • Provide committees or inter-sectorial working groups ad hoc in the cluster operating
3. Organization	
• Cluster's status is non-profit and associative • The responses to the survey are on the same line	• Prepare a draft that includes best options suitable to the objectives, participants / members, organization and possible means
4. Resources	
• The principle of participation trough contribution is widespread and the responses	• Prepare optional budgets, simulate the corresponding resources and deepen the funding sources • Refer to the entities ready to provide resources (office, staff)
5. Public/Private Relations	

• Two situations arise, the relations are established both:
  - within the cluster and
  - within a special reserved cluster composed of private actors and public authorities
	• Reflect on the survey's outcomes and exchanges of the meetings
	• Invite the involved stakeholders to provide their suggestions

6. Actions/Activities	

• Survey's proposals are mostly approved:
  - Web site, annual report, publications
  - Events
  - Studies, projects
	• Include a programme of regular meetings in the organization both:
	  - for the entire cluster and
	  - for specific topics
	• Other activities:
	  - Web site/ annual reports/ publications: essential information should be defined
	  - Establish an annual event as "The Sea Forum"
	  - Ensure that public and private actors will be participate to the Mediterranean Maritime events
	  - Investigate on the opportunities to take part to regional projects

QUESTIONNAIRE "CLUSTER MARITIME NATIONAL"

1. INSTITUTION / ORGANISATION ....

CONTACTS   NOM(S) :   ....
                FONCTION(S) :   ....
ADRESSE   ....
E-mail   ....
Tel.   ....

2. Secteur représenté   ....

Activités exercées par les entreprises du secteur représenté
- Activités générales ....
- Activités en rapport direct avec la mer ....
- Activités en rapport indirect avec la mer

Indicateurs économiques et sociaux sur le secteur (ordre de grandeur)
- Nombre d'entreprises ....
- Emplois ....
- Autres ....

3. Sur la démarche de "Cluster Maritime National"

Pouvez-vous situer, pour votre organisation et ses membres :
- Le niveau d'information sur les Clusters Faible ☐
  Moyen ☐
  Correct ☐
- L'intérêt d'un Cluster Maritime national Faible ☐
  Moyen ☐
  Important ☐

4. Sur les opportunités d'un Cluster Maritime national

Pouvez-vous apprécier, pour votre organisation et ses membres, les potentiels du Cluster en termes de :

	Faible	Moyen	Important
• .... oopération / coordination / réseau	☐	☐	☐
• .... ynergie (affaires, projets...)	☐	☐	☐
• .... romotion collective du "maritime"			
-.. u niveau national	☐	☐	☐
-.. l'international	☐	☐	☐

5. Secteurs avec lesquels votre organisation pourrait développer des relations dans le cadre du Cluster

Secteurs	Votre intérêt			Préciser le type de relations envisageables : synergie, coopération, coordination, lobbying commun, autres
	Faible	Moyen	Élevé	
Transport maritime	☐	☐	☐	
Ports / services portuaires	☐	☐	☐	
Logistique maritime	☐	☐	☐	
Environnement	☐	☐	☐	
Pêche / Aquaculture	☐	☐	☐	
Ressources marines	☐	☐	☐	
Nautisme	☐	☐	☐	
Tourisme côtier	☐	☐	☐	
Offshore	☐	☐	☐	
Patrimoine marin	☐	☐	☐	
Construction / réparation navales	☐	☐	☐	
Finances, Assurance	☐	☐	☐	
Formation / Emploi	☐	☐	☐	
Recherche	☐	☐	☐	
Études / Conseil	☐	☐	☐	
Autres (préciser) :				

6. Activités du Cluster

Parmi les activités suivantes d'un Cluster, quelles seraient celles qui vous paraîtraient les plus utiles (liste indicative) ?

	Faible	**Moyen**	**Élevé**	**Observations**
•	☐	☐	☐	
roupes de contact intersectoriels				
Dossiers prioritaires (préciser)				
•				
encontres public / privé				
-	☐	☐	☐	
ériodiques				
-	☐	☐	☐	
hématiques				
•	☐	☐	☐	
encontres internationales / coopération				
•	☐	☐	☐	
réparation / participation à projets				
•				
utils d'information et de promotion				
-	☐	☐	☐	
nnuaire maritime national				
-	☐	☐	☐	
ite web				
-	☐	☐	☐	
vénements				
•				
utres, préciser				

7. Financement et organisation du Cluster

• .... A

vez-vous des suggestions sur les modalités d'organisation du Cluster ?

Préciser

-           Statut associatif .... ☐

-           Assemblée Générale.. ☐

-           Comité de Direction.. ☐

-            Secrétariat indépendant..☐

-         Autres (préciser) ....

• ....Su

r le principe (et sous réserve d'évaluation d'un budget) :

		Oui	Peut-être	Non		
-	Votre organisation est-elle prête à participer au financement du cluster	☐	☐	☐		
-	Sous quelle forme ? Subventions (Institutionnels / secteur public)			☐	☐	☐
	Cotisations (entreprises...)	☐	☐	☐		
	Mise à disposition de personnel	☐	☐	☐		
	Financement de projets (études...)	☐	☐	☐		
	Autres : préciser					

Autres : préciser ....

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