**Study on Deepening Understanding of Potential Blue Growth in the EU Member States on Europe’s Atlantic Arc**

**Client: DG Maritime Affairs and Fisheries**

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# Identification and analysis of maritime clusters

This section identifies the key Blue Growth clusters in **~~France~~ Spain** and describes their economic activities. Clusters are one of the most notable concepts within economic geography. However they are not always easily to difficult to grasp or to measure as they are not clearly delineated industries or sectors. Clusters can be defined at the level of:

* An end product industry or industries;
* Downstream or channel industries;
* Specialised suppliers;
* Service providers;
* Related industries: those with important shared activities, shared skills, shared technologies, common channels, or common customers;
* Supporting institutions: financial, training and standard setting organisations, research institutions, and trade associations.

In this study, clusters are defined as “a geographically proximate group of interconnected companies and associated institutions in a particular field, linked by commonalities and complementarities (external economies)[[1]](#footnote-1).”

* 1. Maritime clusters in Spain

Building on the clusters already identified in the Blue growth study[[2]](#footnote-2) and complemented with cluster identified in the EU Cluster Observatory[[3]](#footnote-3), the following clusters have been identified for Spain. Clusters in Spain are located in multiple sea basins: the Atlantic and the Mediterranean.

**Table 12–Maritime clusters in Spain[[4]](#footnote-4)**

| **Longlist of maritime clusters**  EU Cluster Observatory | **Suggested clusters for in-depth analysis** | | |
| --- | --- | --- | --- |
| **Cluster** | **Location of the cluster** | **Maritime economic activities in the cluster** |
| Galicia | **Galicia** | Atlantic Arc | Coastal tourism, Maritime transport (deep and short-sea shipping), Fisheries, Aquaculture, Offshore renewable energy, Shipbuilding |
| Andalucia |  | Mediterranean Sea basin / Atlantic Arc |  |
| **Cataluña[[5]](#footnote-5)** | **Cluster Marítim Català** | **Mediterranean sea basin** | Coastal tourism, Maritime transport (Port of Barcelona and Tarragona), Fisheries, Aquaculture, Offshore renewable energy, Shipbuilding, Short-sea shipping, Offshore oil & gas, Cruise Tourism, Port activities, Water treatment, Maritime services |
| País Vasco | **FORO MARITIMO VASCO** | Atlantic Arc | Shipbuilding, Marine energy, Coastline tourism, Maritime transport (port of Bilbao). |
| Valencia |  | Mediterranean sea basin |  |
| Cantabria |  | Atlantic Arc |  |
| Asturias |  | Atlantic Arc |  |

**Shortlist of maritime clusters in Spain for in-depth analysis[[6]](#footnote-6)**

The cluster analysis builds further on the regional allocation of economic activities as described under section 1.2.It also aims at assessing the maturity of the cluster (mature, growing or early development).Two specific clusters have been selected for a more in-depth assessment±

* Basque Country: The Atlantic region has relevant role, comparing to the Mediterranean arc, in terms of fishing and aquaculture and offshore renewable energies. The maritime economy represents 2.5% of the Basque Country’s GDP, with a total value of € 2,100 M and 17,000 employers. The region outstands for its shipbuilding industry, and auxiliary development activities thanks to the improvements and efforts realised in the field of I+D. The Port of Bilbao is ranked the fourth Port in term of traffic activity at the national scale at represents around 1% of the region’s GDP.
* Galicia: Galicia, is characterised by its biological *richness*, intensive fishing and aquiculture activity, maritime transport traffic (Port of Vigo) and shipbuilding industry. The Galician Fleet capacity is the largest of Spain, and fishery traditionally represents an important source of income and employment for the region.
* **Cataluña: Barcelona’s port is the second port in maritime transport of Spain, being also the fifth port in the world for cruisers. Maritime sectors represent around 2% of the GDP of Catalonia and it represents more than 57.000 employers working directly on maritime sectors. Catalonia is the region which receives more tourist of all Spain with more than 14 million tourists last year 2012.[[7]](#footnote-7)**

1. Prof. Michael E. Porter, 20120213, MOC2012 (HBS course) Session 5 - final [↑](#footnote-ref-1)
2. In the previous Blue Growth study, these were: Bretagne, Brest, Marseilles, ES: Galician Coast, Barcelona; [↑](#footnote-ref-2)
3. The EU Cluster Observatory denotes maritime clusters and tourism clusters. [↑](#footnote-ref-3)
4. This longlist is based on the EU cluster observatory. Besides, additional selection criteria were applied, primarily based on the mix of maritime economic activities. See also separate methodology note provided for the cluster analysis. [↑](#footnote-ref-4)
5. **The Catalan Maritime Cluster has been working informally for two years under the oldest union of Europe "Foment the National Treball" and "FEPIME". It is expected that by the end of 2013, will be legally constituted as an independent entity.** [↑](#footnote-ref-5)
6. This selection is based on the longlist compiled through the EU cluster observatory. It has been approved by DG MARE and follows the logic of the request for services. [↑](#footnote-ref-6)
7. http://www.iet.tourspain.es/es-ES/estadisticas/frontur/mensuales/Nota%20de%20coyuntura%20de%20Frontur.%20Diciembre%202012.pdf [↑](#footnote-ref-7)