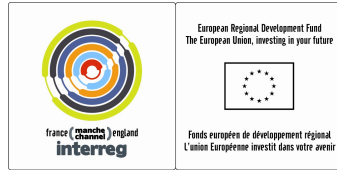




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## > DESIGN SERVICE ON INNOVATION AND CLUSTERS FOR THE INTERREG CAMIS PROJECT

*Summary Report - July 2011*

## Context, objective, methodology

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**Context of the study:** This study is part of the CAMIS « Channel Arc Manche Integrated Strategy » project, launched in June 2009 within the framework of the EU INTERREG IVA France (Channel) – England programme. Its aim is to develop and implement an integrated maritime policy in the Channel area whilst fostering concrete co-operation between stakeholders and businesses. Four economic sectors have been particularly identified (at least in a first instance): *Renewable Marine Energy / Marine leisure / Management of the marine environment / Sustainable port operations*.

**Objective of the design service** (French part of a Franco-British study): Carrying out a report on the support for innovation and maritime clusters in the 5 French regions bordering the English Channel (Bretagne, Basse-Normandie, Haute-Normandie, Picardie, Nord-Pas-de-Calais). The report is divided in 2 parts:

- Presentation of the support for innovation in the 5 French Channel regions ;
- Identification of the potentialities of maritime clusters.

**Methodology: three tools were used** to support this research:

- An online survey amongst the members of several French clusters having maritime related activities and located in the Channel area (in April 2011) ;
- Around 10 interviews of stakeholders involved in the support for innovation in the maritime activities of the Channel area (Regional Councils / Regional Innovation Agencies, Competitiveness clusters, hubs, etc.);
- Desk study based on a great amount of documents to feed the overall analysis and refine specific approaches, either sector-based or horizontal.

## Part 1: The support for innovation in the 5 French Channel regions

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### Organisation of support for innovation

**An inventory of players** enabled a fairly exhaustive assessment to be made of the **large number of participants in the field of innovation**. Four major groups of players were identified:

- Research: a diversified Universities – Higher Institutes – Laboratories triptych in the fields of materials and energy, environment and sustainable development, sea, transport, etc.;
- Transfer and spread of knowledge: powerful structures (5 competitiveness clusters with a global orientation) supported by a dense network of local players ;
- Public establishments – Financial bodies: a quite balanced support (OSEO, ADEME, etc.) in the 5 regions and well-established local management companies ;
- Facilitating innovation at regional level: the involvement of local authorities and players, sometimes at an interregional scale.

In respect of governance, the report highlights the **overall attempt to modernise the existing arrangements** (adaptation to the new economic context; need for refocusing key bodies: ARI Picardie, NFID, SEINARI, etc.). It also points out a **quite original mode of governance** in France: a public interest grouping dedicated to innovation (SEINARI in Haute Normandie).

## Policies and actions in support of innovation

**Regional Innovation Strategies –SRI-** seem to be rather **varied in their formalisation and progress** in the Channel area (some of them with action sheets covering priorities and even covered by financial plans: Bretagne, Basse Normandie; the others being less detailed: Picardie, Nord-Pas de Calais, Haute Normandie). **Some of them are focused** on specific sectors (HN, NPDC, Picardie), the others having a more horizontal approach (Bretagne, BN). **But in most cases**, they promote a widened approach to the field of innovation, the strengthening of the link between Research and Innovation and the development of a culture of innovation.

**Broadly speaking**, the report shows a **close connection of support for innovation policies and Regional Economic Development Strategies (SRDE)**, either SRIs arises more or less directly from SRDEs (BN, Bretagne), or the SRI is an update of the SRDE (NPDC, PICARDIE, HN). Innovation is also **strongly supported through ERDF OPs**, indicating a genuine desire for commitment by the Channel regions in that field of intervention. Bretagne and Basse Normandie are clearly ahead as regards **financial means allocated** to research and technology transfer, but the Channel area as a whole is in a good position when considering the national average.

## Part 2: The potentialities of maritime clusters

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### Cluster policy in France and in the five regions

**At the national level**, the **Channel area has experienced the various policies** aimed at supporting clusters, hosting one of oldest Local Products Systems –SPL- in France (Glass-Producing District of the Bresle valley), almost a quarter of French competitiveness clusters and almost one fifth of the business clusters certified by the DATAR (second call for projects in 2011).

**At the regional level**, **various types of local initiatives** co-exist with different forms (clusters, business clusters, sector associations, technological hubs, etc.) in different sectors (automotive industry, platurgy, energy, logistics, food industry, marine leisure, health, ICTs, maritime businesses and industries), whatever the region where they take place.

### The maritime industry in the 5 French regions

**The economic weight of the maritime industry** is **significant in the Channel area** insofar as 4 of its regions represent around 50.2% of French jobs in traditional maritime sectors ; 50,2% of the French jobs in fishing and products of the sea and around 32% in the coastal tourism sector.

**Amongst the main players** directly involved in the maritime sector **3 competitiveness clusters** are represented: the Bretagne Sea Cluster (maritime industry), Novalog (logistics) and Aquimer (products of the sea). Although there is some specificity as regards the size and strategy of these clusters, they are **some similarities in their governance** (usually constituted as an association and with a similar organisation). Around these clusters there are **numerous research centres and bodies** (such as Ifremer), clusters, business clusters and other groupings (Capbioteck, Am@rrer, Sustainable fishing/Bretagne, etc.).

## Focus on four key sectors

Renewable Marine Energy	<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>True natural potential:</b> 2nd largest maritime area (exclusive economic zone) offering all the opportunities for various types of energy (wind, current, tidal, wave, sea thermal energy, etc.)</li> <li><input type="checkbox"/> <b>The only significant industrial site in the world for tidal power</b> (EDF station at La Rance: annual production of 500 GWh, i.e. 4% of Bretagne's electricity requirements)</li> <li><input type="checkbox"/> <b>Large-scale development projects</b>, e.g. Deux-Côtes off-shore wind farm in the Channel (140 wind turbines / 700 MW, off the coast of Picardy and HN)</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Lack of ambition</b> on the part of public authorities in France: 6 GW in 2020 from off-shore wind energy as opposed to 30 GW for the UK</li> <li><input type="checkbox"/> <b>Competition</b> from English and Scottish sectors</li> <li><input type="checkbox"/> <b>Regulatory constraints</b> which are potentially discouraging for project leaders (authorisation to occupy the public maritime domain, exploitation permit, etc.)</li> </ul>
Marine leisure	<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Players structured in the Channel area:</b> Normandy Nautical Federation (F2N) in BN / Cluster 56: water sports and ship-building in Morbihan, etc.</li> <li><input type="checkbox"/> <b>Developing niche strategies</b>, e.g. the traditional vessels sector, catamarans, and ocean racing (in Brittany)</li> <li><input type="checkbox"/> <b>Competing marinas</b></li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Infrastructure that is sometimes insufficient</b> (marinas at saturation point in BN), and a lack of overall offers in marinas (a complex web of different service providers / a fragmented range of services)</li> <li><input type="checkbox"/> <b>Strong competition from foreign ports:</b> Mediterranean and closer (e.g. Belgian ports)</li> <li><input type="checkbox"/> <b>A position in the 1<sup>st</sup> rank of the Atlantic regions' nautical industry</b> (competitors)</li> </ul>
Port activities - logistics	<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Strategic geographic position of the Channel area</b> to receive the production and distribution of goods for Europe: on the Channel – North Sea range (ports of Le Havre, Calais, Dunkirk), on the Atlantic range (port of Brest)</li> <li><input type="checkbox"/> <b>Large French ports that are well connected</b> overall to roads, motorways, railways and navigable waterways</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> A situation of <b>global economic crisis</b> that affects industrial production and port traffic (e.g. overall traffic down by 5.1% between 2009 and 2010 for Dunkirk; container traffic down by 9% in 2009 for Le Havre)</li> <li><input type="checkbox"/> <b>Lack of significant co-operation projects</b> between ports (apart from SETARMS and SuPorts INTERREG projects)</li> </ul>
Management of the marine environment	<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Existing organisations such as CEDRE</b> (Centre of Documentation, Research and Experimentation on Accidental Water Pollution) <b>or GIP Seine-Aval</b> (Large research network on Environmental sciences – risks analysis and management)</li> <li><input type="checkbox"/> <b>A major national player: Ifremer</b>, strongly rooted in the Channel area and technical centres like the CORRODYS laboratory which is based in BN</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Extremely vast coverage of the field</b> (monitoring and surveillance of habitats and species, measuring water quality, eco-engineering, exploitation of the marine deeps, etc.)</li> <li><input type="checkbox"/> <b>The emergence of conflicts of interest between industrial interests</b> (transport imperatives, energy exploitation imperatives, etc.), <b>socio-environmental interests</b> (preservation of the aquatic heritage, etc.), <b>political interests</b>, etc.</li> </ul>

## The potentialities for the development of Channel maritime clusters

Sectors	Main levers of development
<b>Marine renewable energy</b>	<i>Optimise the co-ordination of competences that are present in the Channel Area and promote existing structures and initiatives (France Energies Marines, Nov@log, CMF...)</i>
	<i>Strengthening training sectors by setting up cross-border modules and encourage cross-Channel mobility in the context of training paths</i>
<b>Marine leisure</b>	<i>Make use of the visibility of leader actors or main events</i>
	<i>Demonstrate the existence of a “sustainable water sports” market and highlight the development of eco-labels</i>
	<i>Strengthen inter-cluster relationships, in particular by the transfer of experience and the exchange of best practices</i>
<b>Port operations / logistics</b>	<i>Assess the sustainable dimension (e.g. through the Sedigest project, which involves the Bretagne Sea Cluster and aims at providing innovative management of sediments from port dredging)</i>
	<i>Change in the perception of secondary ports (Dieppe, Caen,...) by main contractors in particular as regards port logistics</i>
	<i>Adapt qualification needs and training sectors (in the field of logistics in particular)</i>
<b>Marine environment management</b>	<i>Strengthen structuring of research / innovation in conjunction with existing bodies, like IFREMER which is already involved in several cross-border co-operation projects (e.g. CHARM 3, on the management of Channel marine resources)</i>

## Main conclusions

### Maritime cluster development in the Channel Area

Creating new “maritime” clusters does not seem to be particularly relevant in the current context:

- limitation of public credits whilst resources tend to diminish at local level ;
- several convergence initiatives already co-exist in the Channel Area (recent and experienced clusters): a further widening would tend to “muddy” the overall legibility of those networks ;
- only a few significant pieces of feedback have been received (public companies and actors) as to the creation of new clusters.

The strengthening of existing initiatives (hubs and clusters) appears to offer an interesting path, especially through the development of inter-cluster relationships. Complementarities may be sought, for example between territorial clusters (e.g. Cluster 56) and/or interregional clusters, and business clusters using an innovation-based approach (as it is suggested by ECONAV for marine leisure).

### The development of Franco-British exchanges

Sectors where “strengthened partnerships” with Great Britain could take place, as identified through consultation with stakeholders, concern Renewable Marine Energy (natural resources and competencies in the UK), and marine environment management (IFREMER is already involved with stakeholders on the other side of the Channel such as NOCS (National Oceanography Centre) at Southampton).

This appears to be less clear for marine leisure and for the port sector because they present different types of operating logic (most ports are private in the UK / public in France) and a divergence of economic development models (Sterling – Euro parity) which could make it more difficult to penetrate the British market in respect of marine leisure or logistics.