

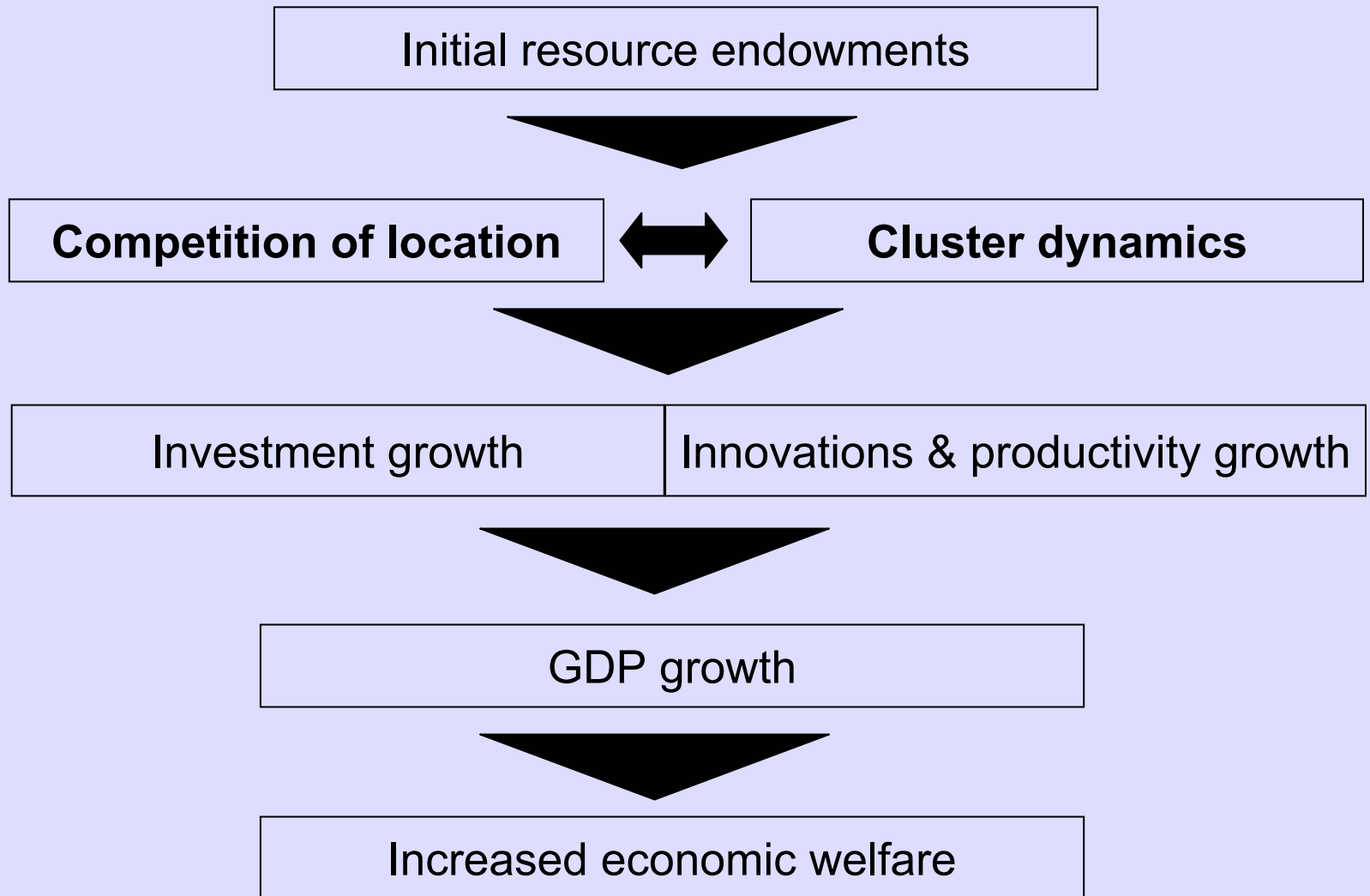
Erik W. Jakobsen • Ari Mortensen • Martin Vikesland • Alexander W. Cappelen



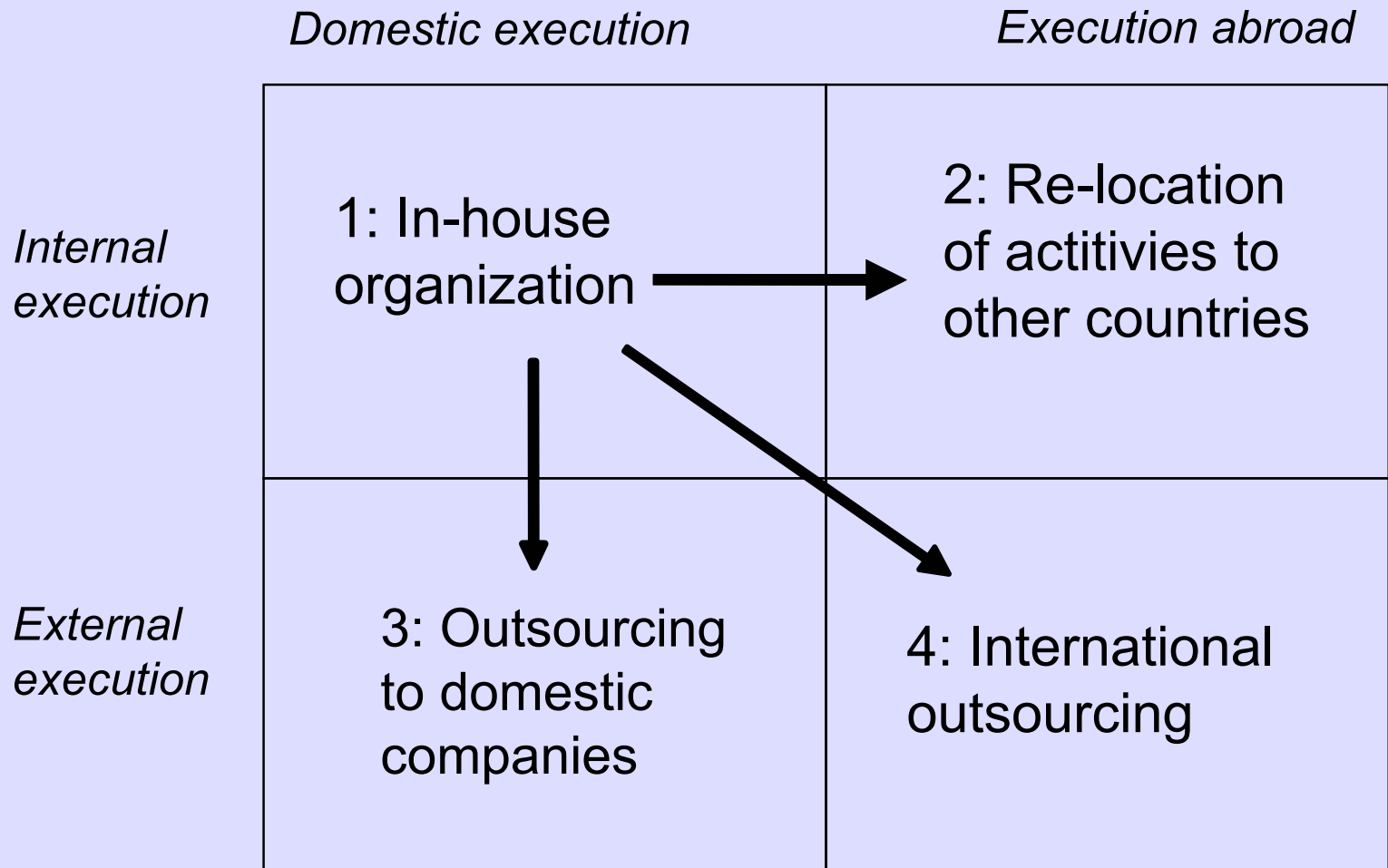
ATTRACTING THE WINNERS

The competitiveness of five European maritime industries

The positive spiral of industrial growth



The value systems of firms have been dramatically reorganized in recent decades



Countries and regions increasingly compete on being *attractive locations* for maritime companies

Key questions of the European Maritime Benchmark:

→ **Which countries are the most attractive locations for maritime business today?**

- For what kind of firms are the locations attractive?
- What are the locations' advantages?

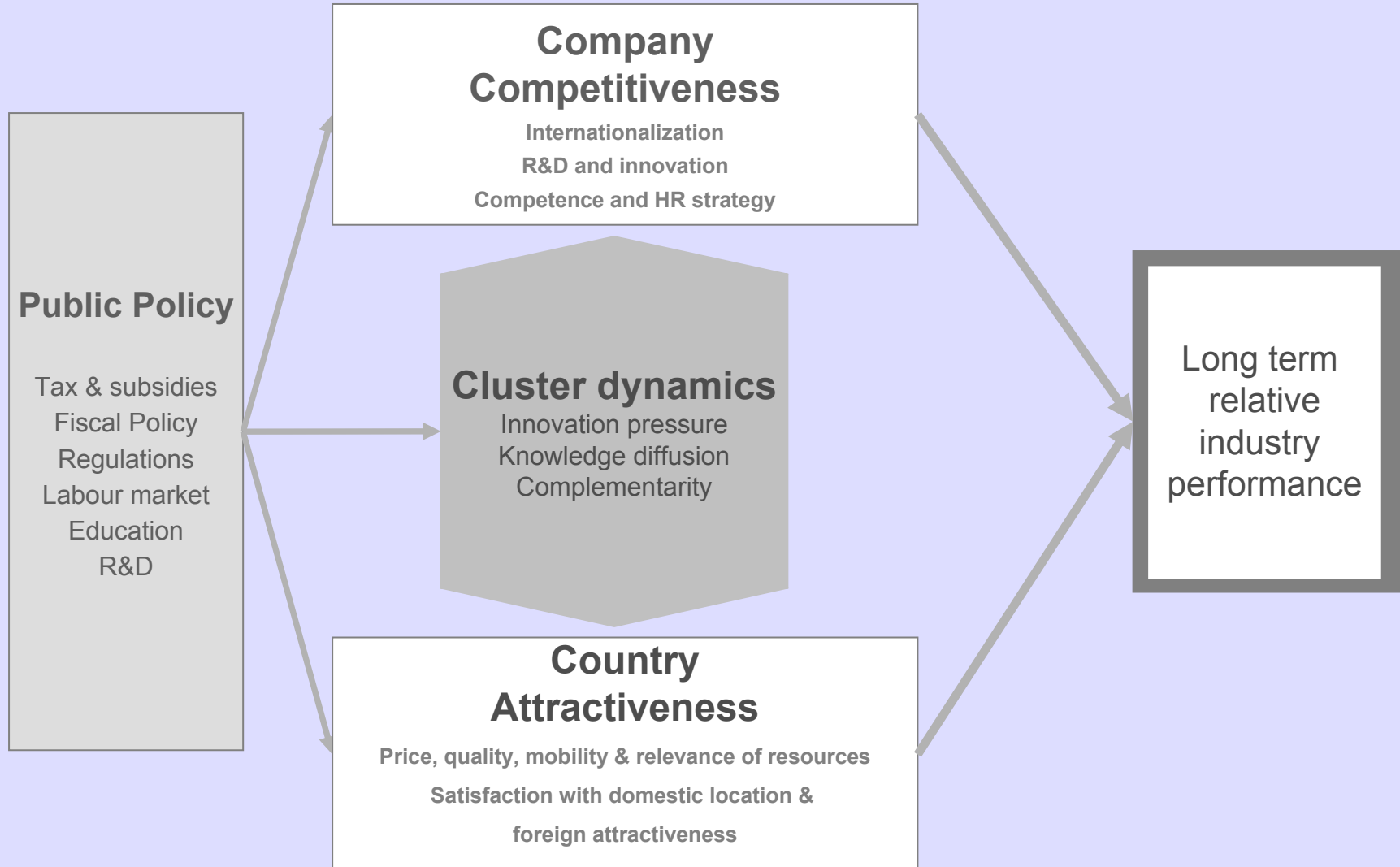
→ **In which countries do we find the most sophisticated companies?**

- What kind of companies are the most international, innovative and knowledge based?
- In which countries do we find these companies?

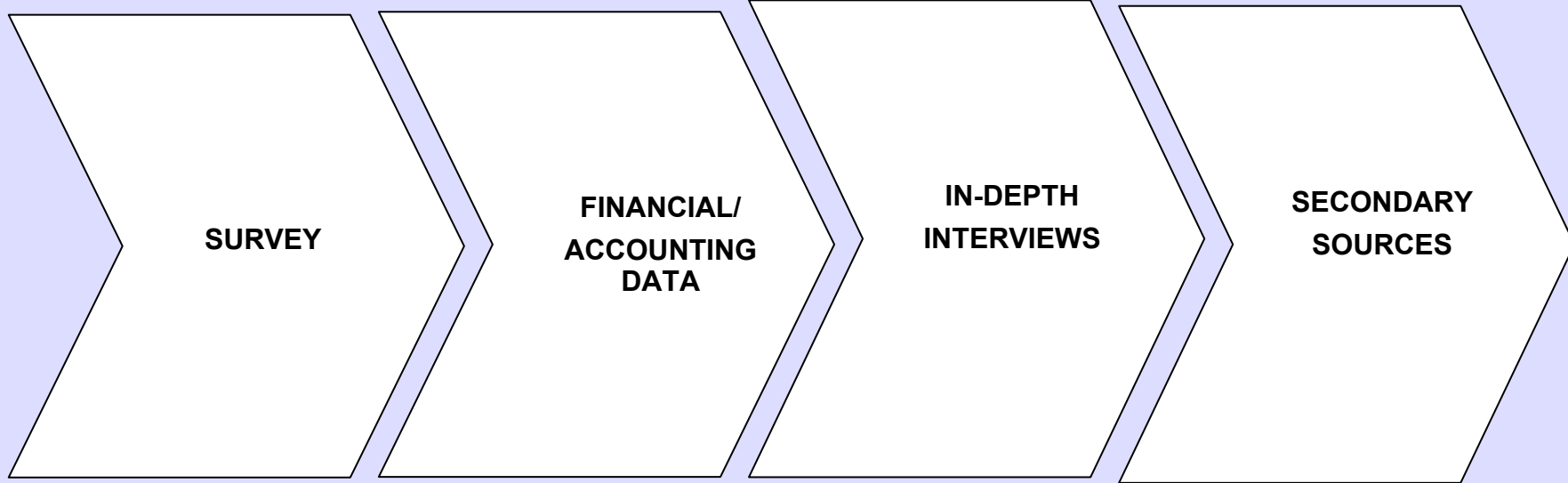
→ **What are the future prospects of the national maritime industries?**

- What will be the location pattern of European maritime industries?
- Where do we expect to find the most competitive national maritime industry?
- For what kind of firms will the locations be an attractive host in the future?

The theoretical framework – What explains long term industry performance?



A variety of data sources have been used in the study



Focal points in survey are

- Competition, cooperation & linkages
- Knowledge, research & innovation
- Input factors
- Public policy and industrial relations
- Location decisions

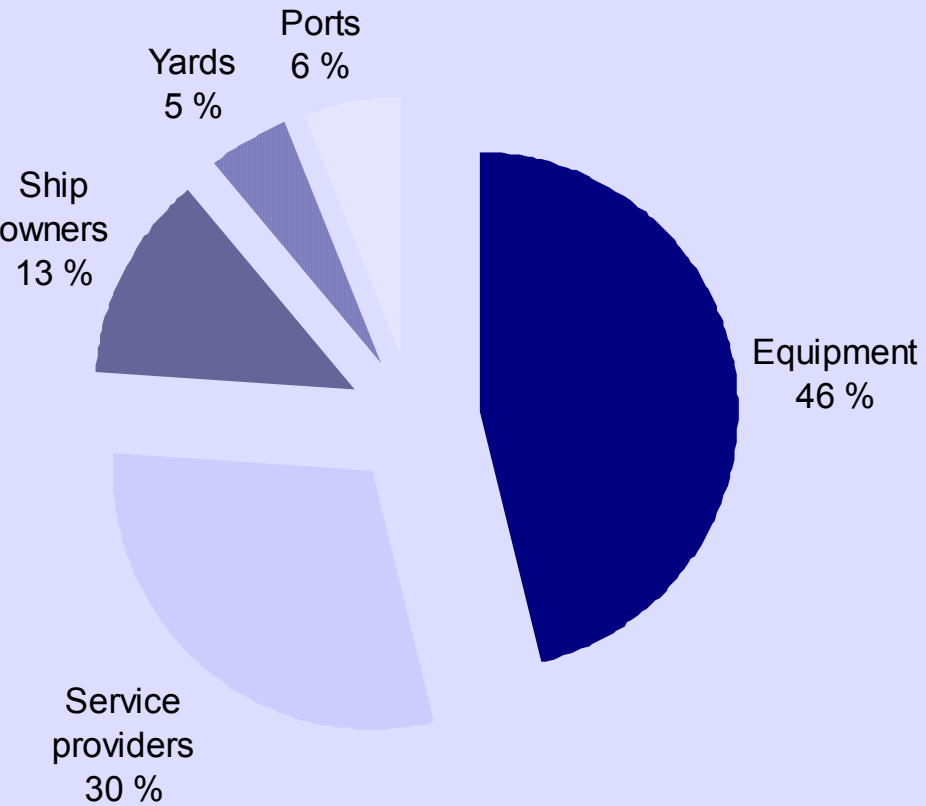
Central players in local markets

- Organisations
- Companies
- Research institutions
- Etc.

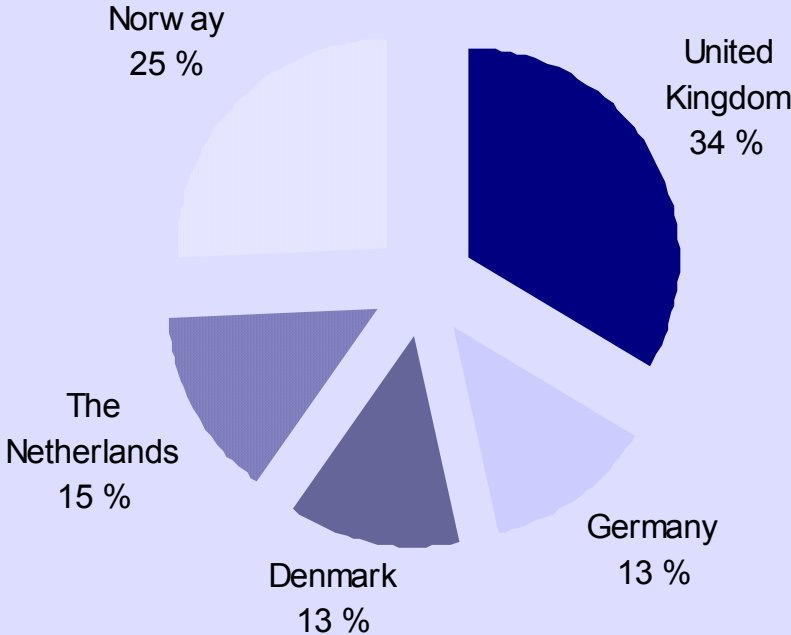
- Accounting databases
- Trade statistics (sector specific)
- FDI / M&A figures (sector specific)

- Publications
- Databases
- Statistics
- Previous research reports

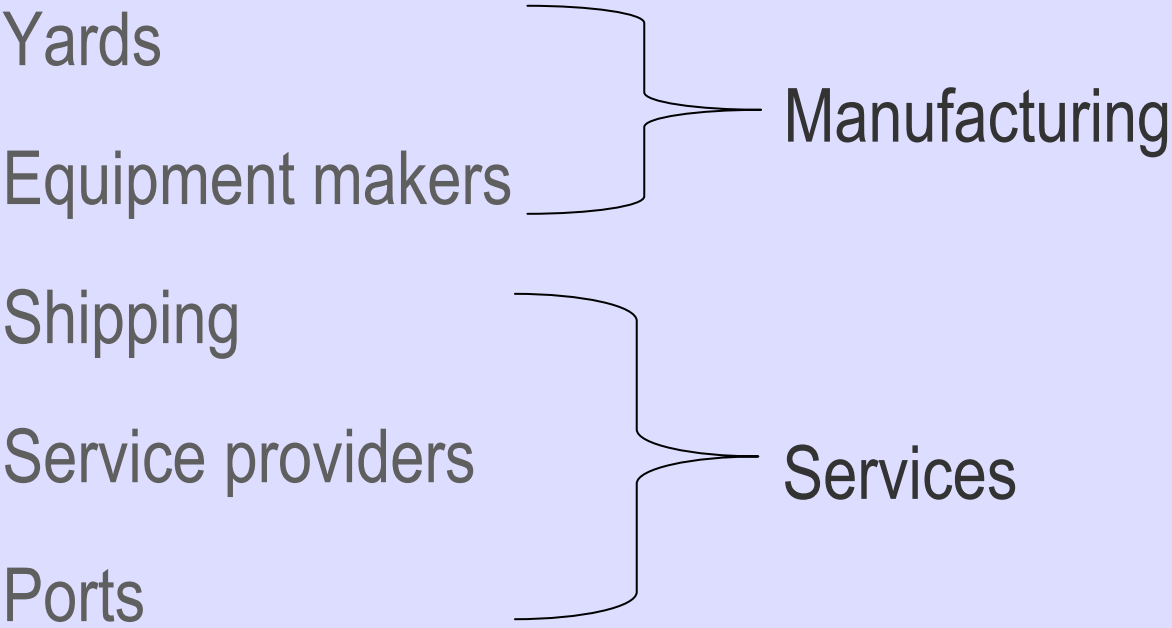
The survey data was collected in 5 countries and 5 sectors



~483 respondents in total



Company classification used in the study



The Regional Maritime Norway

- ⊕ The same theoretical reasoning is sound on an intra-national as well as an inter-national level
- ⊕ In 2001 we conducted a regional maritime cluster study of the size, development, and the regional and national dynamics
- ⊕ 750 interviews with managers in 9 maritime regional industries
 - R&D
 - Innovation
 - Competition
 - Cooperation
 - Competence
 - Infrastructure
- ⊕ Financial data analyses from the entire population of maritime firms in Norway
 - Value creation
 - Profitability
 - Productivity
 - Solidity