

**POLISH MARITIME NETWORK  
INSTITUTE  
SCIENCE-TECHNOLOGY FOUNDATION  
„GDANSK”**

# **POLISH MARITIME CLUSTER**

**PROGRAM ASSUMPTIONS OF MODERN INTEGRATED  
MARITIME ECONOMY NETWORK**

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# Content

- POLISH MARITIME STRATEGY
- OPPORTUNITIES AND THREATS OF POLISH MARITIME INDUSTRIES DEVELOPMENT
- POLISH MARITIME CLUSTER - PROGRAM ASSUMPTIONS
- CONCLUSIONS

# The most important sectors

- Seaports
- Shipbuilding, shiprepairing and conversion industry
- Ocean and inland shipping, yachting, sport and tourism
- Fishery
- Exploitation of natural sea resources in Polish Economic Zone of Baltic

# **VIth European Transport Corridor**

- **Fast railway connection (TER – Trans European Railway), for both: freight and passengers. It's necessary to underline that there are some of railways of VI European Transport Route not fully used.**
- **A-1 Highway as a fragment of connection Scandinavia – Greece - Turkey (TEM - TransEuropean Motorway)**
- **Logistics centres as important innovative element of transport development**
- **Baltic ferry terminals**

# Shipping. Polish Merchant Fleet

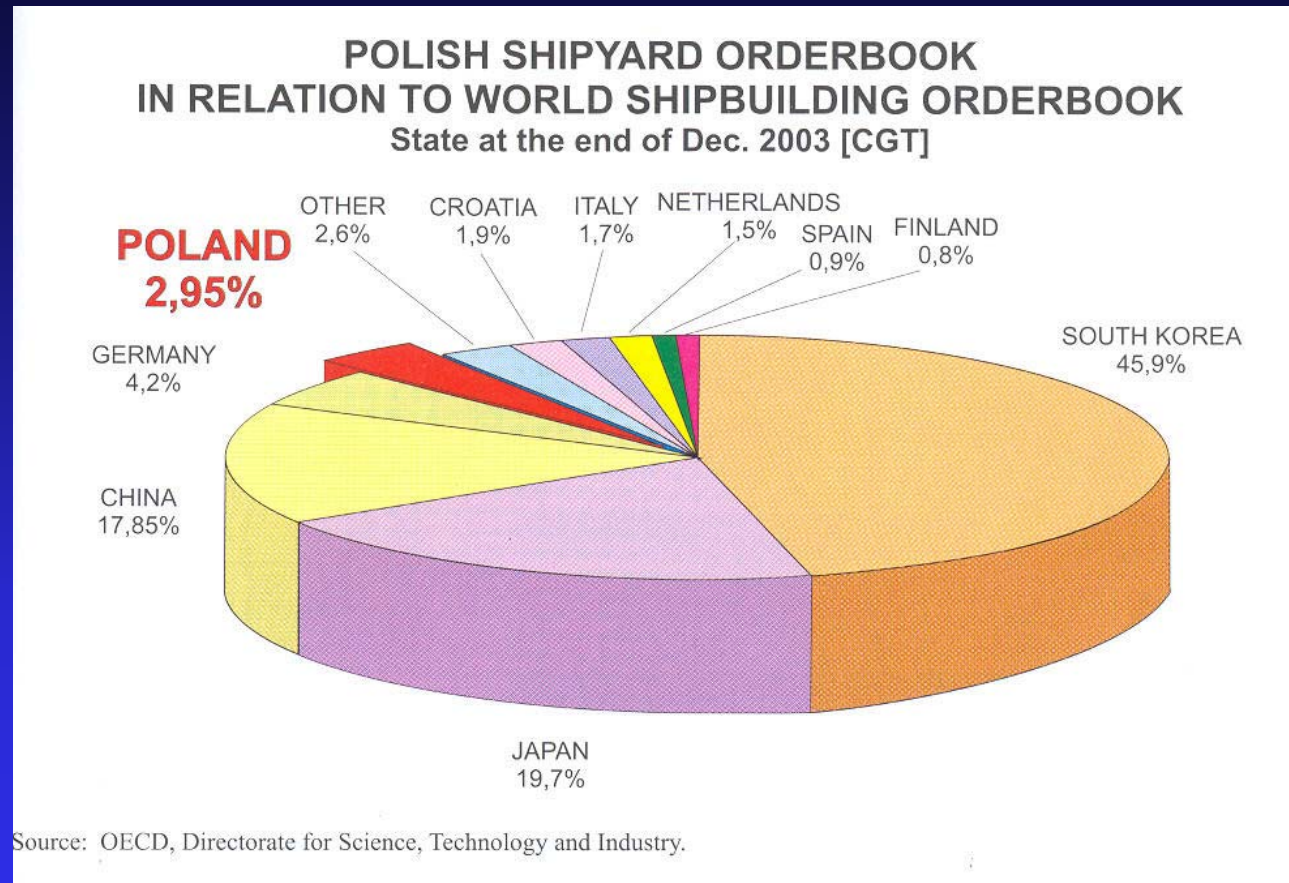
- Shortly before the II World War, Polish merchant fleet consisted of 32 ships with 83 thousand DWT (not counting units of Polish coastal fleet).
- 1949 - 44 ships with 195 thousand DWT,
- 1975 - 314 ships with about 4,0 million DWT,
- 1990 - 234 ships with 4,1 million DWT,
- 2001 - only 110 ships with about 2,3 million DWT.
- Today, the whole Polish merchant and ferry fleet is not under Polish flag.
- Additionally, almost 25 percent of the fleet consists of 21-25 years old and older ships, it means possibility of scrapping them in next years.

# Shipping. Polish Merchant Fleet

**There should be propositions of improvement of competitiveness of Polish shipowners in Polish Maritime Strategy and propositions which will entail the return of ships under Polish flag, propositions like:**

- implementation of II international shipping register with such economic and law solutions that are advantageous for shipowners
- implementation of permitted instruments of financial public help for shipowners,
- Guarantees of Polish transport management in international trade contracts
- Implementation of tonnage tax

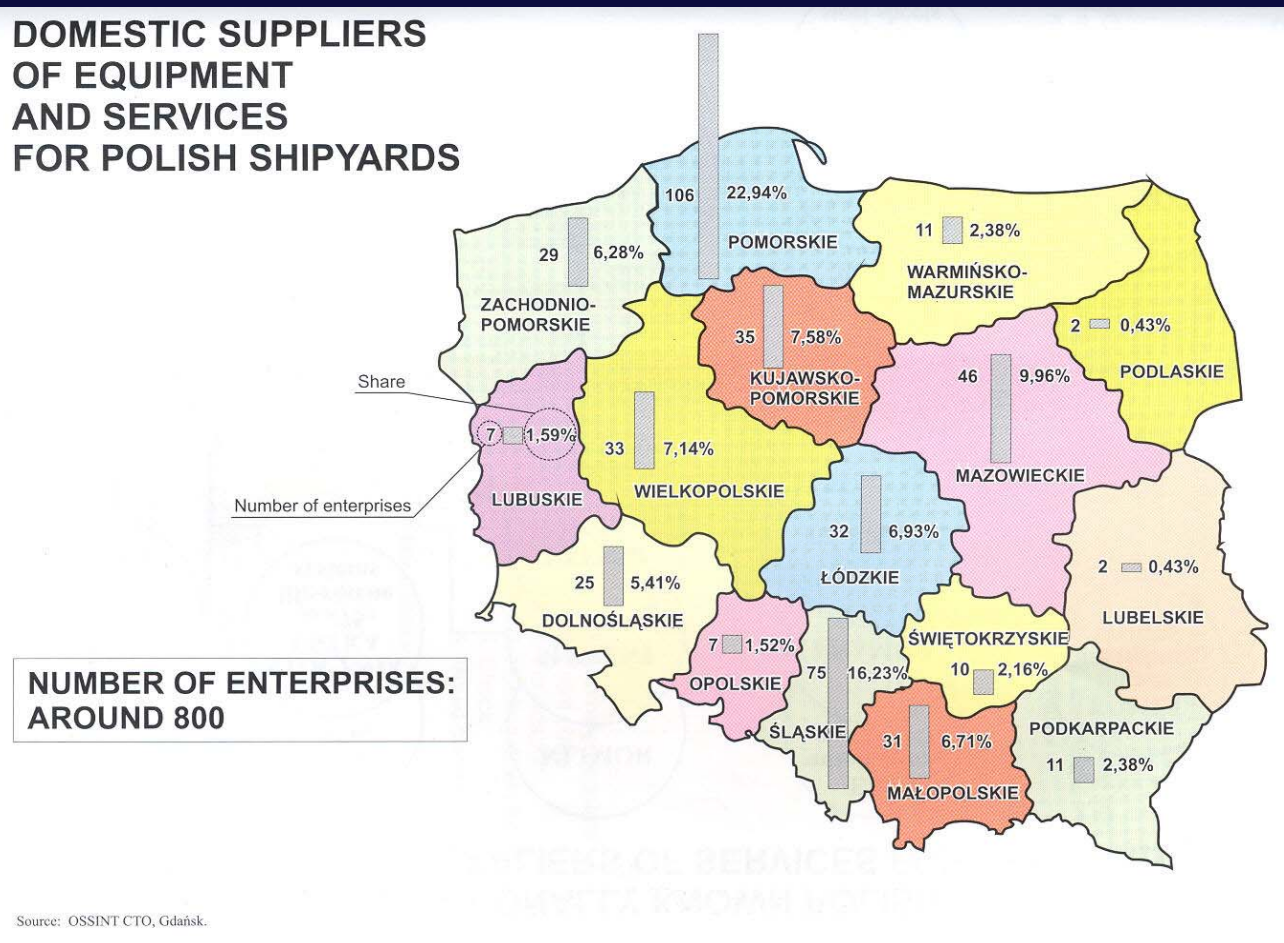
# Shipbuilding and Shiprepairing



**Polish shipyard order book in relation to world shipbuilding order book, 2003.**

# Shipbuilding and Shiprepairing

## DOMESTIC SUPPLIERS OF EQUIPMENT AND SERVICES FOR POLISH SHIPYARDS



Domestic suppliers of equipment and services for Polish shipyards, 2003.



# Sea Fishery

**Fishery had been dynamically developing in 1950-1990 and in 1991 it was characterized by following numbers:**

**Number of ships:**

- **in general - 536 ships,**
- **including far-sea ships - 65 ships.**

**Size of the halves:**

- **in general - 410 thousand tons,**
- **including far-sea - 310 thousand. tons.**

**since 1991 , the size of halves as well as the number of ships are decreasing and in 2000 there were:**

**Number of ships:**

- **in general - 441ships,**
- **including far-sea ships - 24 ships.**

**Size of the halves:**

- **in general - 200 thousand tons,**
- **including far-sea - 59 thousand tons**

# Polish Economic Zone of Baltic

## **The exploitation maritime system (maritime industries):**

- Baltic Fishery and aquaculture
- Fish processing firms and fish trade
- Organization of holidays, tourism, water sports, yachting, health care entails the necessity of development of resorts and camps, ports and harbours, beaches and baths;
- Sea transport and shipbuilding and shiprepairing industry entails the development of ports and shipyards and objects of natural sea resources exploitation
- Hydrotechnical building industry - building and modernization of ports, building and modernization of water tracks, protection of coast and port entries, road and railroad infrastructure.

# Opportunities and Threats

## External conditions of Polish maritime economy development:

- Globalization, competition, innovation – the triangle of development of contemporary information civilization,
- Integration with the European Union,
- practices of protection, especially in shipbuilding industry, shipping and fishery.

# Opportunities and Threats

## Internal conditions of Polish maritime economy development:

### Opportunities:

- Good intellectual potential, knowledge, well-qualified staff,
- Relatively low cost of workforce
- Important geographical and economical location of Polish seaside regions in North-Eastern Europe.

### Threats:

- The lack of coherent development policy,
- Integration operations are not strong enough,
- Unplanned and slow process of privatisation,
- The lack of pro-investments and pro-innovation inducements

# Polish Maritime Cluster

## Maritime industries:

1. ocean shipping
2. inland and seaside shipping
3. shipbuilding and shiprepairing
4. ports and harbors
5. dredging and refuelling
6. subcontractors of maritime industries
7. marine navy
8. sport, tourism, yachting
9. fishery and processing
10. offshore industries

# Polish Maritime Cluster

## Maritime services:

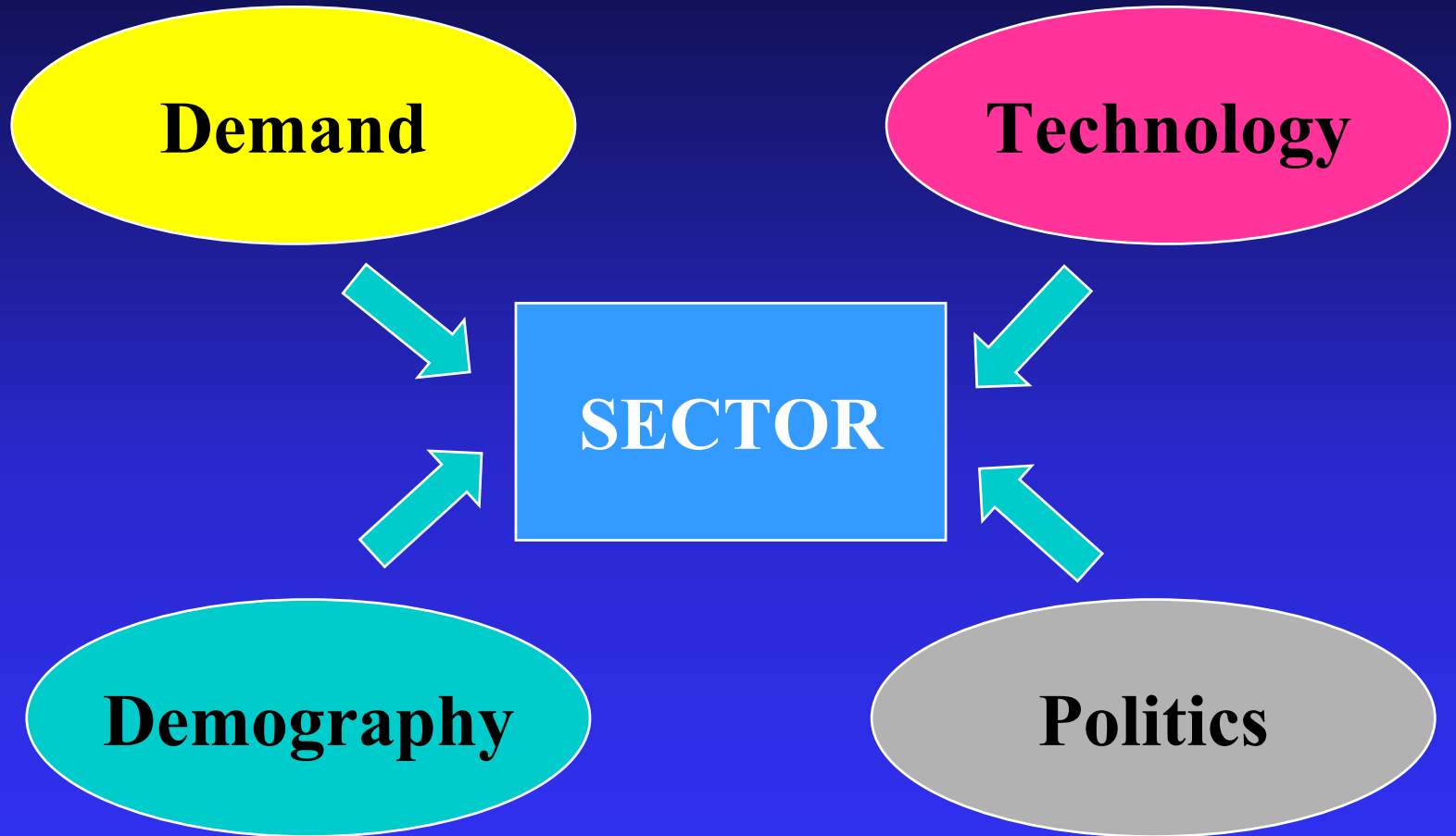
1. logistics
2. expedition
3. shipping agencies
4. port services
5. sea rescue
6. control of quality
7. consultancy
8. hydrotechnics
9. duty services

# Polish Maritime Cluster

## Supporting infrastructure:

1. public and private media
2. schools, universities, R&D institutes
3. local and central administration, associations and chambers
4. financial institutions
5. classification institutions

# Driving Forces of Development Sector





# SUPPORTING INFRASTRUCTURE



## TERRITORIAL AND ECONOMICAL CONDITIONS

Economy: unstable structure, big demand on capital

Cultural and science-technical bases: positive social climate,  
well-qualified and active staff

Life quality: average level

Accessibility: good from outside, average from inside



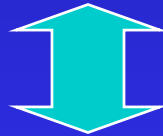
## ORGANISATIONAL CAPACITY

Vision/strategy: there exists elements of network  
strategy

Public-private networks: underdeveloped

Political-social support: weak

Leadership: decentralized, few centres



## SPECIFIC CONDITIONS OF MARITIME CLUSTER

Critical capacity: exists but needs support

Driving forces: ports, shipbuilding and shiprepairing industry

Level of strategic co-operation: currently not large

Level of creation of new firms: needs acceleration

# Polish Maritime Cluster

## Neutral data base

- Co-operation connections
- resources, supply, demand and mobility of workforce
- export potential
- classification of the term „Maritime Economy” in European system
- directives, regulations and other law acts of EU
- statistical data about turnover and production
- Organization and functioning of European Maritime Cluster
- Geographical, financial and freight possibilities for building highways, for strengthen sea-, ferry- and short sea shipping

# Polish Maritime Cluster

## Conclusions (1)

- Many countries want and know how to take advantage of access to the sea in order to develop maritime industries. Polish specialists know about it and inform local and central authorities about opportunity of taking advantage of knowledge and experience of other seaside countries
- Introducing of free competition mechanism, according to XVIII-century liberal rules. was the biggest mistake of Maritime Poland. For decades, shipping, shipbuilding industry, seaports can not exist without active engagement of state. We have to adjust this policy, according to the rules established by EU( State's Aid Rules)

# Polish Maritime Cluster

## Conclusions (2)

- If maritime industries in Poland develop properly, there will be an opportunity to create 100 thousand new work-places in seaside regions of Northern Poland
- Unemployment in Polish seaside regions is bigger than 20 % so it is very important to take advantage of opportunity and to develop maritime industries
- Polish Maritime Cluster should be the most important and urgent project realized in the frames of Polish Maritime Strategy, realized with public help and finances. Project should be realized by the team of Polish specialists, scientists, practitioners, entrepreneurs and representatives of local and central authorities.

# Polish Maritime Cluster

## Conclusions (3)

- Governments of other countries from European Maritime Clusters, guarantee in their national budgets financial funds appropriated on projects and functioning of national maritime clusters
- Polish Maritime Strategy should be a basic document to Polish Maritime Policy. This documents should include additional, corrected records:
  - strategy of seaside regions development,
  - regional documents of area planning
  - records, which concerns properly the maritime matters in new Integrated Operation Programs of Regional Developments for seaside regions in 2007-2013

# Polish Maritime Cluster

## Conclusions (4)

- The works on law regulations should be rationalized, Poland needs especially the new Act of Ports
- Poland needs new program of modernization and development of transport infrastructure, the program have to fulfill the requirements of EU in order to taking advantage of EU funds
- All above mention tasks should be realized in order to modernize and develop maritime industries and in order to create new innovative activities and firms in the sector of maritime industries, services and supporting infrastructure

# Polish Maritime Cluster

## Conclusions (5)

- Realization of the tasks should also be followed by the inflow of foreign capital, also in form of EU grants. It would be advantageous in the process of introducing innovations and modern technologies in Polish maritime industries and services



# Thank You very much

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