



The "Maritime Partenariat" model in The Norwegian Maritime Cluster

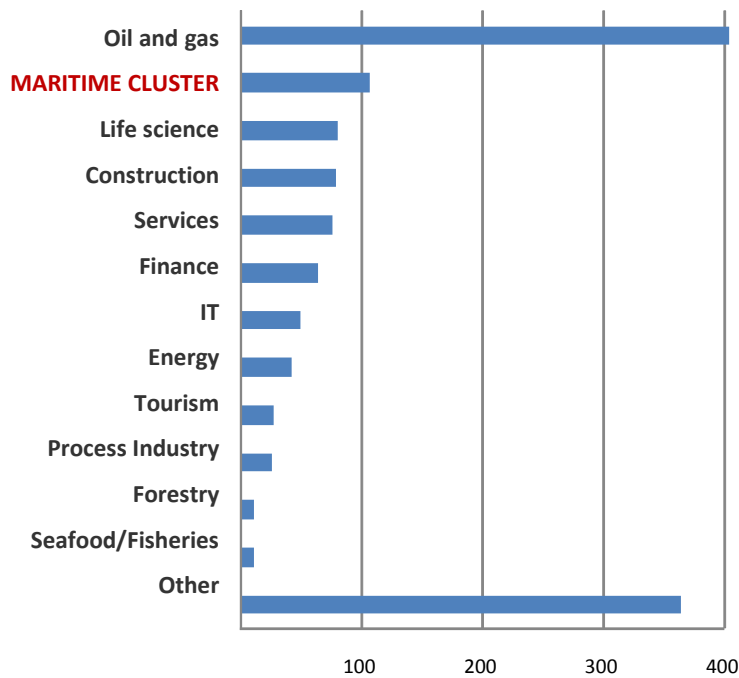


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Maritime Forum South East Norway



Yearly study of value creation in the Norwegian Maritime Cluster

Norway's largest industries measured by value creation in 2008



- Our latest study presented January 2010

- We include companies that deliver 50 percent or more to the maritime sector.

- Value creation is the companies' "gross profit" plus "wage costs"

- The maritime cluster is second only to the oil & gas industry in Norway

- Key figures:

- ✓ Almost 400 billion NOK turnover (50 billion Euro)

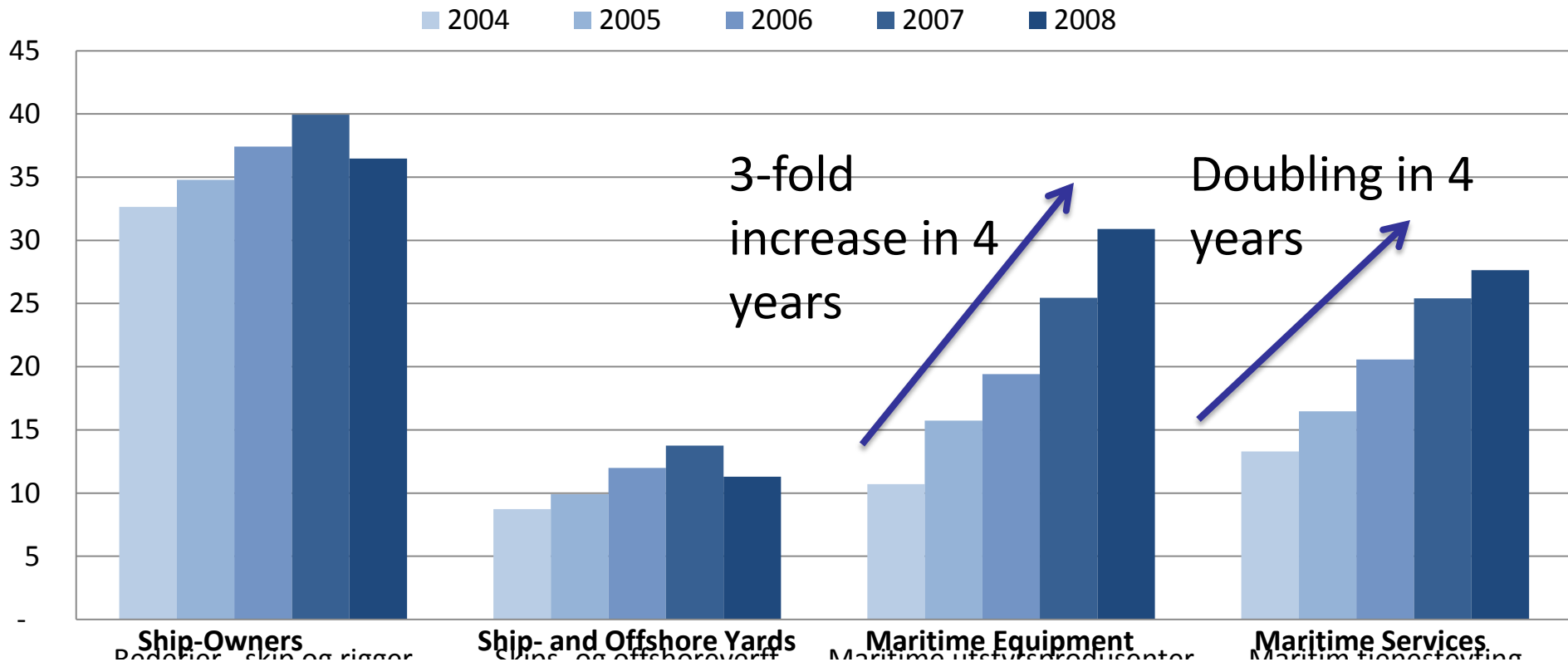
- ✓ 106 billion NOK value creation (13 billion Euro)

- ✓ Almost 100.000 people employed in 2008.



There have been some good years...

Value creation in four main segments 2004 - 2008. BNOK



■ **Map shows employees in the maritime sector in percentage out of total number of employees in the private sector (per municipality 2008)**

Seafarers in the North

Strong regional impact in the North – lacks strength to grow

Maritime Møre

Design, building and operation of offshore vessels

Offshore West

All maritime activities related to development, operation and distribution of petroleum

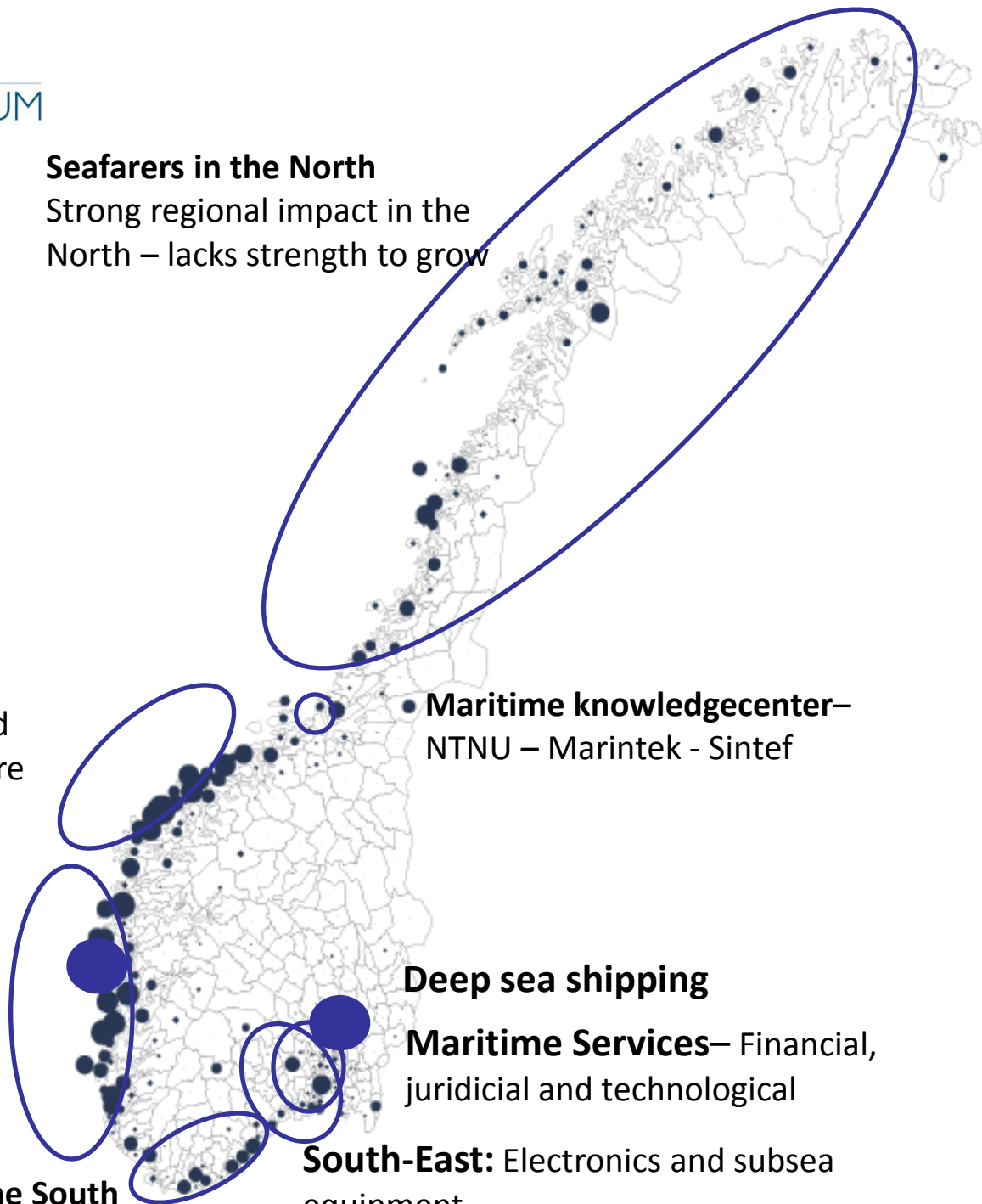
Drilling cluster in the South

Maritime knowledgecenter–
NTNU – Marintek - Sintef

Deep sea shipping

Maritime Services– Financial, juridical and technological

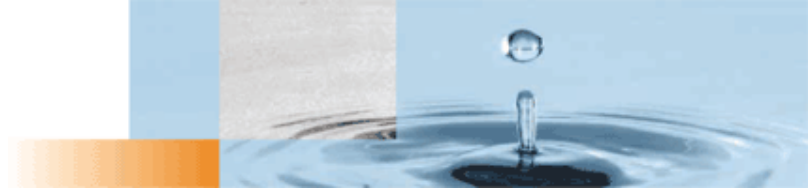
South-East: Electronics and subsea equipment



The financial crisis - Fight to keep the competence

- Government package for the equipment industry and the ship/offshore yards presented in late April 2010
- Increased guarantee frames and increased flexibility in GIEK and Eksportfinans in accordance with OECD and EEA regulations
- Increased support for research, innovation and development
- Continuance of the NOX-fund
- The offshore market not as bad as expected





”Not For All – An Education that can take you far...”

- A negative trend has been broken
- 42 percent increase in applications
- After the financial crises - focus changed from quantity to quality
- Main challenge is to keep the balance with the opportunities for onboard praxis and the shipowners' future need for Norwegian seafarers





The State budget 2011

- Order in the economy important for a stable Norwegian currency – VERY IMPORTANT !
- The tonnage tax-system and grant arrangements for employment of seafarers stays firm
- The Government's Maritime Strategy from 2007 is still maintained
- Stable and predictable framework conditions are decisive for our industry
- We are all in all pleased with the Government's proposed budget for 2011

The Norwegian Maritime Strategy 2007

Steady as she goes

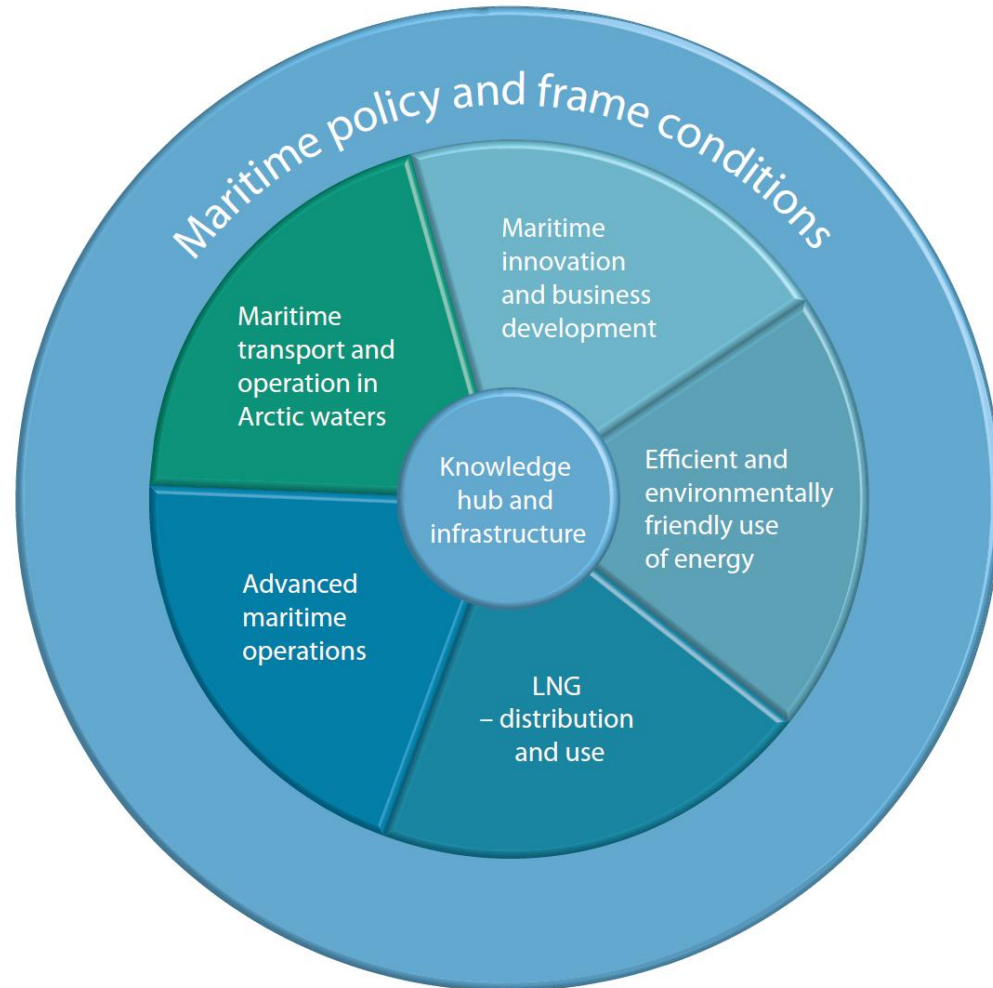
The Government's strategy for environmentally friendly growth in maritime industry





MARITIM 21

- Maritime 21 is the maritime industry's recommended strategy for research and innovation
- Delivered to the Government in June 2010
- The industry's vision:
“Norway – Shall be the most attractive location for global, knowledge based and environmentally robust maritime industry”



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OPENING CONFERENCE MAY 24 // 2011





What is a Maritime Partenariat??

To illustrate the concept - here is how we designed our latest Partenariat:

”St.Petersburg Maritime
Partenariat 2011”