

ACTIVITY REPORT 2018

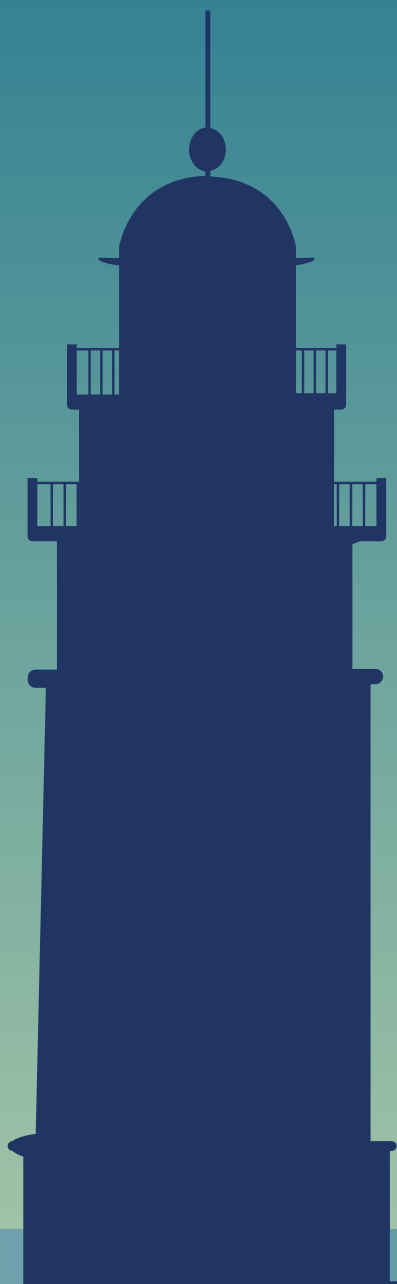


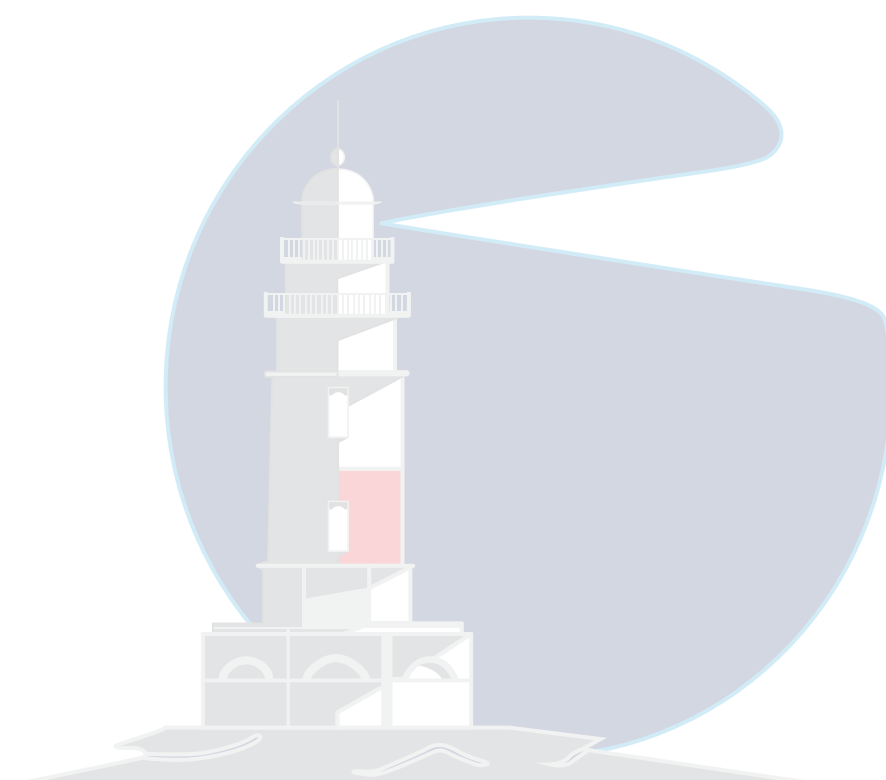
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1. INTRODUCTION





marCA

CLÚSTER MARÍTIMO DE CANTABRIA



2018 has been critical for the launch and operation of the Cantabria Maritime Cluster - marCA. During this period, we have gradually implemented the actions embodied in our Strategic Plan, seeking to satisfy the interests of our members and provide a benchmark framework for the region's maritime sector. Thus, we have concentrated all the steps taken by the Cluster towards the achievement of two key objectives: increasing our visibility and facilitating growth.

Increasing the degree of knowledge of marCA and its activity among all economic and social players in the region has allowed us to raise awareness of the importance and competitiveness of the maritime sector in Cantabria, both in and outside the region. This year, we have hosted numerous informative lectures and attended trade fairs that have acted as a showcase to enhance the attractiveness of new members for the Cluster. These events have also been the perfect framework for meetings between different players of the blue economy. One of the Cluster's foundational aims is to obtain the recognition of society and that the Administration be a reference interlocutor in maritime affairs.

Establishing ways to achieve continuous growth of companies and organisations linked to the Cluster is vital to ensure our continuity in the medium term. We firmly believe in the importance of cooperating to compete. Together we are better. That is why we have invited all kinds of regional industries that share the sea as a means of exploitation to join this initiative. The sectoral transversality of our Cluster represents a pivotal advantage in creating inter-partner business opportunities. The result of this cohesion effort has been reflected in a considerable increase in our membership numbers, which has doubled in just one year.

With the launch phase of marCA already advanced, it is time to set new goals. Increasing our collaboration network, consolidating ourselves as a reference in the sector and our commitment to internationalisation will be priority goals to try to generate wealth that reverts in the society of Cantabria.

Juan Luis Sánchez Echevarría
President of the Cantabria Maritime Cluster





2. PRESENTATION OF THE MARCA CLUSTER



The Cantabria Maritime Cluster (MarCA) was created in September 2017 by five founding members to promote cooperation and the commercial and technological development of Cantabria's maritime industries and activities by creating opportunities and synergies that boost its competitiveness in national and international markets, generating high value and wealth for society and positioning the Cantabria maritime industry in its maximum development exponent; all this with the aim of leading areas of specialisation in strategic national and international markets.

Its objectives are:

- Consolidate the naval maritime sector in Cantabria, acting as a benchmark for all industry players, and represent both the interests of the sector and those associated with the maritime sector before public administrations and any other decision-making bodies.
- Increase the competitiveness and business opportunities of companies or entities in the naval maritime market, combining synergies that allow access to the most important projects both in Spain and abroad.
- Position the Cantabrian maritime industry in its maximum exponent of development to lead areas of specialisation in strategic international markets.
- Promote the presence and international recognition of the Cantabrian maritime sector.
- Achieve a greater involvement of companies, associated entities, organisations, universities, technological centres, research and public and private training in research processes and knowledge transfer, to obtain advantages and benefits derived from the execution of innovative projects in the naval maritime sector.
- Communicate and disseminate the importance of the sector for our society and economy.
- Promote and facilitate the training of professionals of the naval maritime sector with the latest technological training valid also for other industries and markets.
- Create qualified employment from vocational training to engineering.
- Promote the implementation of future key technologies in manufacturing and services according to the digital model.
- Monitor the national and international maritime and naval market to identify the remains, trends and prospects of the sector and make known among the cluster participants the short and medium term movements to define the joint action strategy.
- Encourage and promote the communication and exchange of knowledge between the members and the different sectors and activities of the Cluster to favour and encourage debate, cooperation and collaboration in projects and the generation of synergies.
- Identify the general and transversal interests of the maritime sectors and members of the cluster, as well as the levers of value creation and actions that respond to industry challenges, promoting and defending these interests in the different regional, national and international fora, both public and private, without prejudice to the particular interests of the various members.

The strategic axes form the backbone of the Cluster and represent the main lines of action for the fulfilment of the objectives of the MarCA Cluster.

The strategic axes are:

- Competitiveness
- Innovation and technology
- Internationalisation
- Talent
- Communication and Society
- Sustainable development and protection of the marine environment
- Digitalisation

Thanks to the close collaboration of the cluster members and the impulse of the strategic axes, members are expected to contribute and receive different value proposals generated thanks to the synergies created by mutual knowledge and cooperation. The benefits expected by Cluster members for collaboration and cooperation in the cluster are:

- Technological developments and innovations
- New products
- Increase market share and new markets
- Projects
- Others

The result of this is the agreement signed on 20 March 2018 with the Liga Naval, which aims to join forces and establish collaboration between the two organisations to develop the following fields:

1. Research for the development of the maritime sector.
2. Socioeconomic studies on the problems of the different marines:
 - a. Merchant Marine
 - b. Fishing
 - c. Sports and Recreation
 - d. Navy
3. Revitalisation of the Merchant Marine
4. Promotion of the vocation to travel

The **MarCA Cluster** has an **Executive Committee** and a **General Assembly**, which is made up of all the members of the Cluster. The following events were held in 2018:

- 23/01/2018 Executive Committee Meeting
- 16/02/2018 Executive Committee and Extraordinary General Assembly
- 07/03/2018 Meeting of the R&D Working Group at CTC
- 20/03/2018 Meeting and visit to Astander
- 28/03/2018 Executive Committee Meeting
- 20/04/2018 Visit to Fernández Jove
- 25/04/2018 Executive Committee Meeting
- 06/06/2018 Executive Committee Meeting
- 22/06/2018 Ordinary General Assembly. It was held in FAED and a visit to the company.
- 09/07/2018 Executive Committee Meeting
- 24/09/2018 Executive Committee Meeting
- 22/11/2018 Executive Commission
- 04/12/2018 Ordinary and extraordinary assembly at Gamesa, visiting its facilities.

In 2018, 21 members joined:

- | | |
|--|----------------------------------|
| • ALFINTER FORWARDING, SL | • PORT AUTHORITY OF SANTANDER |
| • MECANIZACION INDUSTRIAL ASTILLERO, SA. | • SIDENOR FORGINGS & CASTINGS |
| • BRITTANY FERRIES SANTANDER | • BERGÉ MARITIMA, SL |
| • DEGIMA, SA. | • BUREAU VERITAS IBERIA, SL |
| • ECOL INGENIERIA INDUSTRIAL, SLU | • VELASCO & Co.ABOGADOS |
| • SAJA INDUSTRIAL Y NAVAL, SA. | • UNIVERSITY OF CANTABRIA |
| • SILECMAR, SL | • ASSOCIATION OF CIVIL ENGINEERS |
| • ERZIA TECHNOLOGIES, SL | • NAVINSNORT3 |
| • CANTABRIA ENVIRONMENTAL HYDRAULIC INSTITUTE FOUNDATION | • ASSOCIATION NAVAL ENGINEERS |
| • GAMESA ELECTRIC, SAU | |

As of 31 December 2018, the cluster had 28 members (compared to 7 in 2017):

- | | |
|---|--|
| • ASTANDER | • SILECMAR, SL |
| • FERNÁNDEZ JOVE | • ERZIA TECHNOLOGIES, SL |
| • FAED | • CANTABRIA ENVIRONMENTAL HYDRAULIC INSTITUTE FOUNDATION |
| • SODERCAN | • GAMESA ELECTRIC, SAU |
| • CTC TECHNOLOGY CENTRE | • PORT AUTHORITY OF SANTANDER |
| • SISTEMAS ELECTRONICOS Y TELECOMUNICACION, SA. | • SIDENOR FORGINGS & CASTINGS |
| • MONTAJES GOMUR, SL | • BERGÉ MARITIMA, SL |
| • ENWESA OPERACIONES, SA. | • BUREAU VERITAS IBERIA, SL |
| • CASUSO PROPELLERS, SA. | • VELASCO & Co.ABOGADOS |
| • ALFINTER FORWARDING, SL | • UNIVERSITY OF CANTABRIA |
| • MECANIZACION INDUSTRIAL ASTILLERO, SA. | • ASSOCIATION OF CIVIL ENGINEERS |
| • BRITTANY FERRIES SANTANDER | • NAVINSNORT3 |
| • DEGIMA, SA. | • COIN |
| • ECOL INGENIERIA INDUSTRIAL, SLU | |
| • SAJA INDUSTRIAL Y NAVAL, SA. | |

			
ASTANDER	FERNANDEZ JOVE	FAED	SODERCAN
			
CTC TECHNOLOGY CENTRE	SETELSA	GRUPO GOMUR	ENWESA
			
CASUSO PROPELLERS	ALFINTER FORWARDING	MINDASA	BRITTANY FERRIES
			
DEGIMA	ECOL	SAJA INDYNA	SILECMAR
			
ERZIA	IH CANTABRIA	GAMESA ELECTRIC	PORT AUTHORITY OF SANTANDER
			
SIDENOR FORGINGS & CASTINGS	BERGÉ MARÍTIMA	BUREAU VERITAS IBÉRICA	VELASCO & CO ABOGADOS
			
UNIVERSITY OF CANTABRIA	ASSOCIATION OF CIVIL ENGINEERS	NAVINSNORT3	COIN



3. ACTIVITIES 2018



3.1 ATTENDANCE AT TRADE FAIRS



In 2018, the MarCA Cluster set out to participate in two very representative trade fairs, one of which was national but had an evident international character, Navalia and the other was international, SMM Hamburg, within its promotional schedule.

Both are benchmark fairs in the sector and served to publicise the Cluster, its objectives and sectors represented, as well as the members that compose it.



NAVALIA 2018

Navalia 2018 took place between 22nd and 24th May in Vigo. The Cluster made its debut as an exhibitor here.

Navalia is the central fair of the maritime sector in Spain. It has been held twice a year since 2006. More than 25,000 professionals visited the 2018 edition of the fair, which took place between 22nd and 24th May.

The association occupied a 16 m2 stand, wholly dedicated to showcasing the Cluster, its corporate members, its objectives and the actions envisaged to promote both MarCA and its members.

More than 30 meetings were held with attending companies that were interested in the activities of the Cluster and its member companies.

All the consultations made by the attendees were also collected for their subsequent processing.

The presence of the MarCA Cluster in Navalia, as part of its promotional activities, served to announce its objectives and activities, and to establish relationships, as well as helping to promote the companies that are part of the Cluster.

Mr Juan Luís Sánchez, the president of the cluster, manned the stand along with numerous partners, who were participating as exhibitors in the same fair.



SMM 2018

The Cluster's participation in SMM 2018, which took place in Hamburg between the 4th and 7th of September, was the Cluster's first attendance at an international event abroad.

The most important fair of the naval maritime sector at international level is SMM, reaping a participation of more than 2,200 exhibitors and an affluence of 50,000 visitors. The SMM presents the latest developments in the sector and is one of the main showcases of the sector.

The group's presence at the SMM materialised in a 18 m2 stand to promote the cluster, its activities, objectives, member companies and the commercial possibilities offered.

More than 45 meetings were held with top companies and business organisations, thus establishing both commercial and collaboration relations for future projects and ventures. In addition, MarCA members used the space in the stand to hold different meetings.

The fair turned out to be very positive, so much so, that the cluster is planning to return in the 2020 edition.



3.2 TECHNICAL CONFERENCES



Several technical conferences were organised to present current sectoral topics as part of the training and innovation programme.

“INDUSTRY 4.0 IN THE MARINE SECTOR”

The conference was held on 7th June, at the Conference Hall of the Instituto de Hidráulica Ambiental de Cantabria (IH Cantabria) in the Science and Technology Park of Cantabria (PCTCAN) and was organised by MarCA Cluster and Grupo Fernández Jove.

Mr Manuel Angel Recamán Rivas, Naval Construction Director of Navantia, gave a keynote speech on the future of the shipbuilding industry and the future of companies, which will have to adapt to a large extent to the industry's automation and connectivity models, the so-called 4.0 Companies.

The 4.0 Industry, cloud computing, big data, robotisation or artificial intelligence will be key disciplines to generate new business models that lay the foundations of the shipyards of the future. More and better technology used to repair, transform and build intelligent, energy-efficient, connected and non-polluting ships and appliances.

The current situation and examples of companies that are advancing in this model, and the implications it has had on their business models were discussed.



“RADICAL TRANSFORMATION IN THE MARITIME AND ENERGY MARKETS”

The conference was held on 23rd July at the Institute of Biomedicine and Biotechnology of Cantabria (IBBTEC) and was hosted by Cluster MarCA.

The prestigious engineer Javier Cavada, President of Wartsila Energy, explained the main challenges that the maritime and energy sectors have to overcome with particular focus on digitalisation, decentralisation and decarbonisation phenomena.

He was accompanied in his presentation by Juan Luís Sánchez, President of the Cantabria Maritime Cluster, MarCA, and General Manager of Astander, and Iciar Amorrtortu, General Manager of Sodercan.



"THE DEFENCE INDUSTRY AS A DRIVER OF ECONOMIC DEVELOPMENT."

The conference was hosted by the Economists' Association of Cantabria on 28th September, at Hotel Bahía.

Valentí Pich Rosell, President of the General Council of Economists' Associations of Spain and Fernando García Andrés, Doyen-President of the Economists' Association of Cantabria were in charge of giving the opening speech.

The Vice-President of the Maritime Cluster of Cantabria MarCA, Juan Fernández Jove, presented the cluster and highlighted how much of an opportunity the program for the design and construction of future frigates of the new class F-110, which will replace the obsolete F-80 could be for the maritime industry of Cantabria.

The day ended with a panel of defence companies in Cantabria.



La industria de defensa en España facturó en 2017 unos **8.000 millones de euros**, representa un 0,9% del PIB nacional y un 5,9% del PIB industrial, genera **56.404 empleos** y destina un 83% de su facturación a la exportación.

No menos de **una decena de empresas cántabras** trabaja habitualmente en proyectos relacionados con la defensa, en actividades de alto valor añadido y con un gran componente tecnológico. Equipamientos para las telecomunicaciones y tejidos especiales para uniformes de campaña, forman parte de un catálogo que tiene su ejemplo más llamativo en el revolucionario motor del futuro submarino S-60 Plus, fabricado por Gamesa en Reinosa, pero que aporta oportunidades de negocio a empresas de todos los sectores, en la mayor parte de los casos con productos que tienen también una aplicación en el ámbito civil.

La industria de defensa en términos económicos es importante. Pero la contribución de la industria de defensa al desarrollo y crecimiento de un país, es mucho más que una cifra de facturación o de empleo. Es un elemento clave a la hora de asegurar la libertad y el bienestar de los ciudadanos, la defensa de nuestros valores democráticos y la estabilidad global.

JORNADA:
La industria de defensa como motor de desarrollo económico

VIERNES 28 de septiembre de 2018
HOTEL BAHÍA
C/ Cádiz, 22 – Santander

Entrada libre hasta completar aforo

economistas
Colegio de Cantabria

Liberbank



PROGRAMA

09:30 h.- Presentación de la jornada:
-Valentí Pich, presidente del Consejo General de Colegios de Economistas de España.
-Fernando García Andrés, decano-presidente del Colegio de Economistas de Cantabria.
-Almirante Santiago Ramón González Gómez, director general de Armamento y Material (DIGAM).

9:45 h.- Conferencia inaugural: "Posición de la industria española en los principales programas de armamento"
Almirante Santiago Ramón González Gómez, director general de Armamento y Material (DIGAM). Ministerio de Defensa.

10:15 h.- "La contribución del CNI a la defensa de los intereses nacionales".
Representante del Centro Nacional de Inteligencia (CNI). Ministerio de Defensa.

10:45 h.- "El Programa Fragata F-110: Una oportunidad para la industria naval".
Juan Fernández Jove, vicepresidente del Clúster Marítimo de Cantabria.

11:00 h.- "La investigación en Defensa: oportunidades y retos de colaboración. Un caso de éxito".
Dr. Francisco Jesús Velasco González / Dr. Elías Revestido Herrero, director e investigador, respectivamente, del Grupo I+D+i Informática y Automática del Departamento de Tecnología Electrónica e Ingeniería de Sistemas y Automática de la Universidad de Cantabria.

11:15 h.- Pausa café.

11:30 h.- "INDRA, empresa española tractora y de referencia en la industria nacional y extranjera de la Defensa".
Manuel Escalante, director de Defensa y Seguridad de INDRA.

12:00 h.- Panel de empresas de defensa en Cantabria. MESA REDONDA
Modera: Alfonso Bourgon de Izarra, Asesor de comunicación del Colegio de Economistas de Cantabria.
-Roberto González, Responsable de la División Militar. Textil Santanderina (Cabezón de la Sal).
-José Luis Gutiérrez, Director comercial y desarrollo de negocio. Gamesa Electric (Reinosa).
-Juan Becerra, Director general. TTI (Santander).
-Manuel Lobeira, CEO. Acorde Technologies.
-Luis García, CEO. Erzia Technologies / Santander Teleport (Santander).
-Marcos Pérez, Director de Desarrollo de Negocio. Leading (San Felices de Buelna).
-Antonio Fernández, Director gerente. Grupo Fernández Jove (Torrelavega).

13:30 h.- Clausura: Juan José Sota Verdión, Consejero de Economía, Hacienda y Empleo del Gobierno de Cantabria.

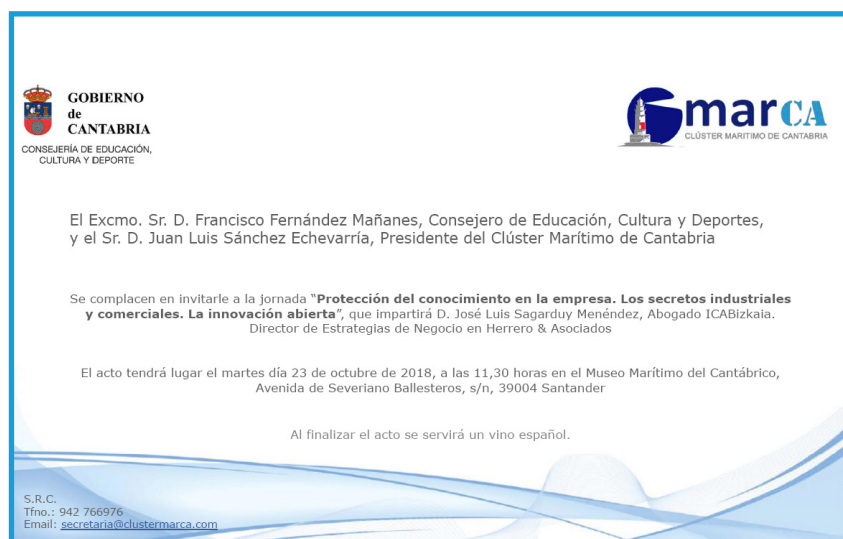
“PROTECTION OF KNOWLEDGE IN THE COMPANY. INDUSTRIAL AND TRADE SECRETS. OPEN INNOVATION”

The seminar was hosted by the MarCA Cluster and the Ministry of Education, Culture and Sport of the Government of Cantabria on the 23rd October at the Cantabrian Maritime Museum.

Mr José Luis Sagarduy Menéndez, Lawyer ICABizkaia and Director of Business Strategies at Herrero & Asociados, made a presentation on how to protect innovation, knowledge, industrial secrets generated in companies, and the differences with the other formulas used in neighbouring countries.

The importance of protecting the knowledge generated by companies and their industrial research to reach high value-added market niches was discussed.

Furthermore, “open innovation” is an increasingly popular concept. It consists of the acquisition and use of knowledge from sources external to the organisation and also the use of indirect ways of reaching the market.



MARITIME SECTORAL TABLE

The meeting of the Maritime Sectoral Table, under the title “Future of the maritime sector in Cantabria”, took place on 30th of November in the Conference Room of the Instituto de Hidráulica Ambiental de Cantabria (IH Cantabria) in the Science and Technology Park of Cantabria (PCTCAN) and was organised by the MarCA Cluster.

Mr José Luís Sánchez, President of the MarCA Cluster and Director of Astilleros de Santander (Astander) moderated the round table accompanied by Mr Jaime Gonzalez, President of the Port Authority of Santander, Mr. Borja Lambea, Business Director of Sidenor, Mr Manuel Pascual, General Manager of Brittany Ferries España, and Mr José Manuel Manrique, North Ports Manager of Bergé.

The current situation of the sector, the short and medium-term objectives of the industries to meet the modernisation goals, the development of the 4.0 industry, new business opportunities and the challenges of the decarbonised economy towards which the sector advances, were some of the topics discussed during the event.



3.3 INSTITUTIONAL MEETINGS



The Cluster participated in the National Meeting of Naval Clusters as part of its pursuit of showcasing itself and establishing new relationships with other companies, clusters and institutions.



NATIONAL NAVAL CLUSTER MEETING

The first naval cluster meeting in Spain was held in Cadiz on the 17th of October, and the MarCA Cluster was invited to participate.

This meeting contributed towards making visible the potential and importance of this sector at a national level and having a space where experiences can be shared, issues of common interest debated and possible ways of collaboration between the different Spanish clusters explored.

The different maritime clusters exchanged experiences and discussed the future of the sector and the importance of this type of business associations as the driving force of the local industry and as a multiplier agent for its activity.

The objectives set in the meeting were:

- Achieve the digital transformation of the industry with the 4.0 objective.
- Consolidate a quality and innovative production model compared to that of other emerging countries. Firm commitment to R&D+i.
- Consolidate and guarantee the value chain through a dimensioned and capable supply chain.
- Support internationalisation.
- Ensure public administration support to the sector in all areas: industrial, resources and infrastructure, financial, commercial and legal.

During the meeting, there was also time to visit Navantia's facilities in Cadiz Bay.

CANTABRIA CLUSTERS MEETING

On the 8th of November 2018, the different clusters that are currently developing their activity in Cantabria met to exchange experiences and share the activities that each one was developing.

This meeting aimed to foster greater coordination between the different associations and seek opportunities for synergy between them.

COLLABORATION AGREEMENT WITH THE SPANISH NAVAL LEAGUE

On March 20, 2018, MarCA signed a collaboration agreement with the Spanish Naval League to work together in areas such as R+D+i, the preparation of socio-economic studies, promotion and stimulation of the merchant marine, fishing, sport sailing and the navy.



3.4 PRESENCE IN THE MEDIA



January 2018 “A cluster to win the blue economy”. Cantabria Negocios

<https://cantabrianegocios.es/wp-content/uploads/2013/11/cantabria-negocios-revista-220-enero-2018.pdf>



24/05/2018 “Companies of the future. MarCA Cluster”. Popular TV

<https://popularartvcantabria.com/2018/05/25/empresas-del-futuro-24-mayo-clustermarca/>



03/06/2018 “The Maritime Cluster of Cantabria analyses the industry 4.0”. El Diario Montañés



09/10/2018 “First national meeting of clusters”. Diario de Cádiz

https://www.diariodecadiz.es/provincia/Cadiz-acogera-encuentro-nacional-clusters_0_1289571325.html



