



Future Collaboration for the Marine Sector in Devon – Pulling Together

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Executive Summary

The following report highlights the main findings from a maritime cluster facilitation workshop run by the University of Chichester at the Devon Pulling Together event held in February 2012. The event was held in collaboration with Devon County Council, as part of the Interreg IV A Channel Arc Manche Integrated Strategy (CAMIS) project.

The primary objective of the Pulling Together event was to encourage collaboration within the maritime sector in Devon, with the University of Chichester working to evaluate the potential for a maritime cluster in the region. The event followed on from the University's earlier research into how the development of business clusters could benefit the maritime sector.

Delegates were introduced to the benefits of clustering and knowledge exchange activities for the Devon maritime sector and were asked to consider three questions in preparation for the workshop session. Analysis of the answers indicated support for a South West regional maritime cluster, encouraging better relationships with neighbouring counties rather than limiting a cluster to Devon. Given this, four main areas of interest were identified and used to direct the workshop sessions. The workshop evaluated these in the context of success, required actions, and consideration of the potential barriers and their solutions.

Analysis of the workshop discussions identified a range of key findings:

- The overarching theme identified throughout the workshop was that of communication. The importance of effective communication both within and about a South West maritime cluster was viewed as being integral to its success.
- In order for a maritime cluster to be successful an effective leader would need to be identified.
- A South West Maritime cluster would be an opportunity for maritime industries in the region to be represented nationally.
- It was observed that there was a limited sense of awareness and understanding of the maritime sector in the region, with delegates expressing support for the development of a South West maritime directory.

- It was felt that coupled with the development of a directory, a regional maritime cluster could serve to promote the South West as a brand, acting as a representation of quality standards.

In addition to suggestions for the development of a successful cluster in the region, delegates were asked to discuss potential challenges and their solutions. The most common barrier to a cluster was the perception that working closely with other businesses could result in a loss in competitive advantage. The successful development of a cluster could address this, and the lack of trust between businesses, by encouraging collaboration, providing networking opportunities and promoting the benefits of working within a cluster.

Following the event, analysis of the workshop session allowed a number of recommendations and action points to be proposed. These include the development of a South West maritime directory, identification of an effective cluster leader, improved communication within and about the sector, determination of the geographical scope of the cluster and evaluation of wider collaboration opportunities. In order to achieve these, there are a number of proposed action points that Devon County Council should consider:

- Firstly, rather than proposing a complete reinvention of a maritime cluster in the region, it is recommended that existing relationships and infrastructure (e.g. BMF, TYHA, DCC) be used more effectively to encourage the development of a successful maritime cluster;
- It is also recommended that a comprehensive directory of the maritime industries in the South West region be developed. It may be possible for Devon County Council to utilise the existing CAMIS database;
- As Devon County Council recognise the benefit of a maritime cluster for the region, it is possible that they could work with regional stakeholders to identify an appropriate leader for the cluster;
- Given the importance attributed to effective communication throughout the workshops, it is also proposed that Devon County Council work to develop innovative and inclusive methods of communicating with cluster members.

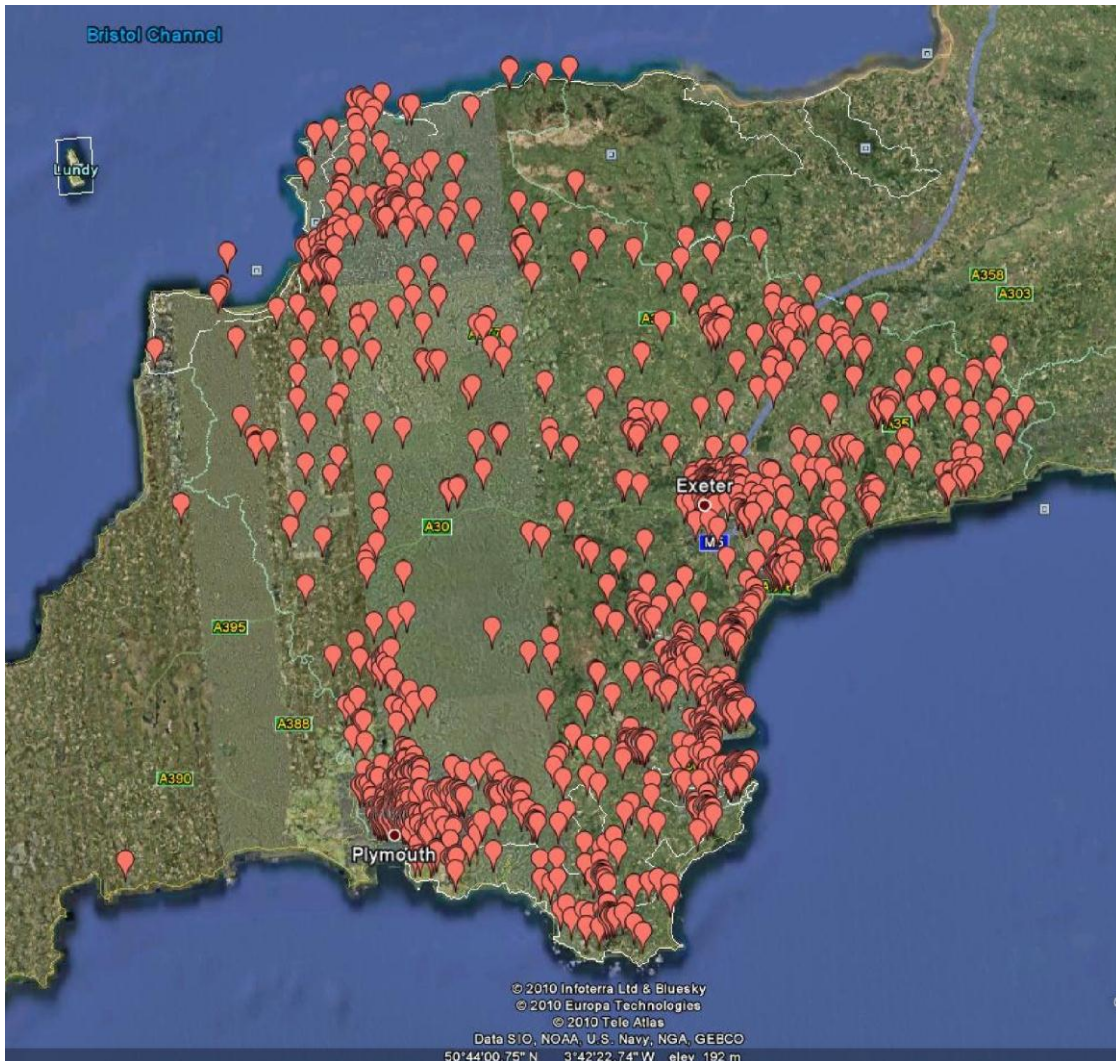
- Finally, it is proposed that Devon County Council should develop an action plan that will encourage the development of a cluster in the region and promotion of the South West regional brand, addressing the issues identified throughout the workshop.

The University of Chichester are working in conjunction with Devon County Council to generate an action plan that will facilitate the development of a maritime cluster for the South West region.

1. Introduction

This research has been conducted as part of a larger Interreg IV A Project – Channel Arc Manche Integrated Strategy (CAMIS). The CAMIS project is working to establish an integrated policy and management strategy for maritime industries within the Channel region. As outlined by Robins (2011), the South West region of England has a diverse and vibrant maritime sector with Devon accounting for a significant amount of maritime activity on the South coast. Earlier research conducted by the CAMIS project identified four primary themes of maritime activity; marine renewables, marina tourism, marine operations and marine environment, all of which are well represented in Devon. Figure 1 indicates the distribution of industries across Devon, while Figure 2 represents the Devon maritime industries within the four CAMIS themes.

Figure 1: Geographical representation of maritime industries in Devon



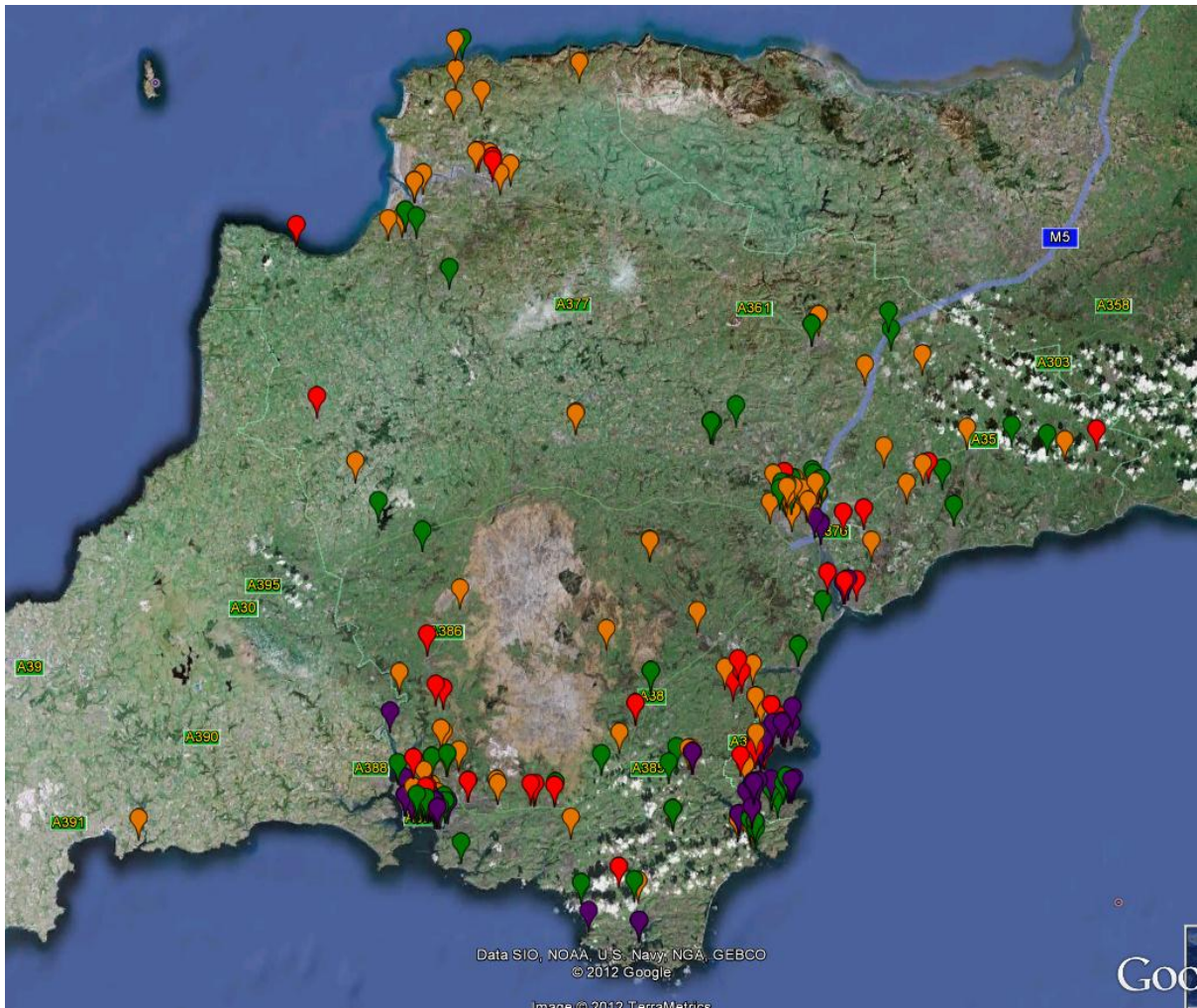


Figure 2: Illustration of Devon maritime businesses within the four CAMIS themes. The four themes are represented as follows: red = marine operations, orange = marine renewables, green= marine environment, purple = marina tourism.

This report will identify the main findings from the cluster facilitation workshop run as part of the Future Collaboration for the Maritime Sector in Devon – Pulling Together event, held in Totnes, Devon in February 2012. The event was well attended, with over 87 delegates in attendance, representing a diverse range of sectors and encouraging lively debates within the workshops. Figure 3 illustrates where the stakeholders who attended this event are currently based. The majority are from Devon, as expected, but there were a number of attendees who came from further afield, which may be something that should be considered when discussing the focus of a maritime cluster in the South West region.



Figure 3: Geographical location of event attendees¹

The principle objective of the Pulling Together Event was to encourage collaboration within the maritime sector in Devon. The University of Chichester were invited to attend to facilitate initial discussions about the potential role of a Devon Maritime Cluster in delivering long term sustainability for the maritime industries in the region. The aims of the workshop session run by the University of Chichester were to enable the attending businesses and stakeholders to highlight and discuss common goals, identification of potential barriers and their solutions, and facilitate the process of knowledge exchange and collaboration within the sector.

2. Methodology

A short presentation highlighted the benefits of clustering and knowledge exchange activities for the Devon maritime sector and introduced three questions for delegates to consider in preparation for the workshop session:

1. What are your top 3 goals for your business over the next 5 years?
2. How might collaboration help you to achieve these goals?
3. How could a Devon Maritime cluster add value and benefit your business?

Delegates were asked to provide answers to these questions so that the workshop sessions could be directed in an appropriate manner. Analysis of the answers indicated that rather than develop a Devon specific maritime cluster, delegates would support the development of a South West regional

¹ It is worth noting that there were three delegates from France and also one from Inverness, Scotland, but these locations could not be included on the map.

maritime cluster, encouraging better relationships with neighbouring counties. Taking this into consideration, three main areas of interest were used to direct the workshop sessions:

- The potential identification of a South West brand and how a South West marine industry brand could be developed;
- The issue of collaborative research and development; also considering how to further develop the SW marine industry brand within the context of research and development. This focuses on the recognition and identity of the South West brand; recognition within the local, national and international markets and a sense of identity for and within the region.
- How to promote a South West regional supply chain through sharing knowledge of local skills, expertise and capabilities.

Additionally, based on an earlier presentation about the potential funding available through the Regional Growth Fund, the facilitation determined that this could be an area of potential collaboration for business and identified it as a fourth area of interest:

- Is there an opportunity for a collaborative Regional Growth Fund (RGF) bid within South West region?

Delegates were split into two workshop groups and asked to discuss these questions throughout the hour long workshop session. It is worth noting that due to the number of delegates, two concurrent workshops were held in separate rooms during this session. Within each room, the groups were further divided in two to allow effective facilitation. Each group was asked to consider two of the four² questions in the context of what success would look like, what needs to be done to achieve success, identification of who should be responsible for possible actions, and finally, consideration of the potential barriers and their solutions. Staff from the University of Chichester acted as facilitators and scribes for these workshop sessions and noted down the key points being discussed by the groups.

² Within each room, one group considered Questions 1 and 2, while the other group considered Questions 3 and 4.

3. Observations from Workshops

Analysis of the workshop sessions indicated that there is significant support amongst the region's maritime industries for the development of a South West region maritime cluster. In addition to this support, a number of key themes regarding the development of a cluster were identified, which are discussed below.

3.1 Need for a thorough understanding of the sector

Throughout the workshop, it became clear that delegates don't feel like they currently have a thorough understanding of the maritime industries in the region, or access to this information. Increasing this knowledge about the skills, expertise and goods available within the region was seen to be central to the successful development of a maritime cluster. It was suggested that this could be improved through the development of a detailed directory of businesses and opportunities in the South West region that would be made available to members of the cluster. Delegates proposed that this would be a way of promoting opportunities for collaboration in research and development, and improving relationships within the region. It would provide the platform for knowledge of innovation, research, and funding and collaborative activities to take place. It was suggested that this was something that Devon County Council could be involved in delivering.

In addition to having a role to play in the development of a maritime cluster, the directory would ensure all actors in the maritime sector would have a greater understanding of the skills and expertise available in their region, access to contact information allowing improved networking and result in more opportunities for collaborative research and business development. This would have an influence on the likelihood of any future collaborative funding bids.

In summary, the key points taken from this theme are:

- That there is a need to increase stakeholder understanding of the region's maritime industry;
- A strong call for a comprehensive South West maritime directory detailing the region's maritime industries ensuring wider understanding of the region's industries.

3.2 Importance of communication and networking

Communication and a South West maritime cluster

Communication is a broad theme and encompasses communication across a range of relationships, method of communication, content and audience. The importance of effective communication was stressed throughout the workshop and was identified as a factor that is currently failing within the region's sector. When considering issues of communication, thought should be given to the methodology of communication (via a website, face to face networking events and meetings); and the content of the information being communicated i.e. is it being communicated to the target audience in the best way, is the right information being made available. It was commented that a maritime cluster would have to invest in effective and innovative communication techniques to ensure its success. It was acknowledged that in order for these to be successful, it would be necessary for the cluster to adopt innovative communication techniques. A range of potential solutions were suggested and discussed during the workshops. Delegates suggested the use of e-technology to promote the cluster and communicate its messages, through web based meetings, e-newsletters and internet based social networking sites, such as LinkedIn. Additionally, it was proposed that a quarterly newsletter promoting collaboration, research and funding opportunities and advertising prospective networking events would be of benefit to the development of a cluster. Improving communication was seen as the key to increasing understanding and awareness of the diversity of the marine sector in the South West region, allowing the effective promotion of a South West brand.

Communication and R&D

The issues associated with communication applied to a range of actors and relationships. It was stressed that in order for successful research and development to happen within the region, better communication between industry and the researching bodies would be necessary. Utilisation of the experience and skill available in the various academic organisations was seen as a vital component of the South West's ability to conduct successful research, but delegates felt there was a gap between the research being conducted and the industry's needs. Developing a maritime cluster inclusive of these highly active R&D bodies would improve communication between these two groups, with the cluster having the potential to act as an effective interface between the commercial sector and

traditional research and development. Improvements to this relationship would have a positive impact on the commercial value of the R&D conducted in the region, also further developing the South West brand. It was suggested that a maritime cluster would benefit from working with Plymouth Marine Lab who currently work to bridge the gap between industry and academia.

The need for effective networking

There was clear support for a South West region cluster and effective networking opportunities. While participants acknowledged that networking opportunities are available within the region, in their current format, they are not viewed as being particularly effective and there was a sense of urgency associated with addressing this issue. One group suggested the provision of a 'match making' service that could encourage networking and match potential collaborators together would be of benefit. Many felt that Devon County Council could have a role to play in the facilitation of networking opportunities and that they should work in conjunction with other bodies (such as the BMF, Chamber of Commerce, Plymouth and Torbay Councils) to ensure all areas of the sector and region are represented.

The key points from this theme are:

- The need for effective and innovative communication techniques;
- Better communication between businesses to encourage collaborative relationships;
- Facilitation of collaboration within the maritime industry through the provision of more effective networking opportunities.

3.3 Identification of the benefits associated with a South West maritime cluster

It was the general consensus of the workshop sessions that for a South West maritime cluster to be successful, clear benefits would need to be identified. Delegates were of the opinion that in order for companies to engage with a cluster effectively, they would need to feel sure that they would experience benefits and that they would get something back for investing their time and effort into the cluster. The benefits of clustering have been well documented in other industries and include increased profitability, collaborative purchasing and marketing techniques and improving overall profit and operating efficiency. Additionally, once these benefits have been identified for the South

West region, they will need to be effectively communicated. Companies will want to join a cluster that has a real purpose, with evidence of clear benefits. A practical way of disseminating this information may be through holding another cluster facilitation event in the region – encouraging further networking between companies, setting out the structure of the cluster and showcasing examples and evidence of where clustering has produced tangible benefits for its members.

- Central to this theme was that in order for businesses to engage with a cluster, the benefits of membership need to be identified and clearly outlined.

3.4 Need for effective leadership

One of the key themes identified throughout the workshop was the agreement that in order for a maritime cluster to be successful, an effective leader would need to be identified. It was felt that a South West Maritime Cluster would be an opportunity for maritime industries in the region to be represented on a national scale, ensuring their opinions and needs as an important maritime region were given a voice. What was very definite was the stakeholder desire that a cluster and any collaborative work be business led. Although the need for leadership was identified as a primary concern, no one body was identified as being the appropriate leader. This is an area that will need further consideration should a South West regional maritime cluster be initiated.

From a structural perspective, there were some concerns that the diversity of maritime industries represented in the South West region could not be successfully facilitated within a regional cluster. It was suggested that it may be useful to develop an overarching cluster that could facilitate the dissemination of information to smaller, more industry/ business specific working groups – essentially small cluster groups within a larger, regional cluster. It was thought that this could reduce stakeholder fatigue, ensuring that while businesses have access to all information, members would not be bombarded by information irrelevant to their business. Moderating communication in this way could be a way of ensuring that the cluster succeeds on a long term scale as it would maintain stakeholder buy in.

Participants commented that if a maritime cluster was to be successful in the region, it would be important to avoid ‘recreating the wheel’ and that a cluster would benefit from recognising and

utilising the existing infrastructure. The importance of effective utilisation of existing infrastructure and relationships was commented upon, such as that between the DCC, British Marine Federation, the Local Enterprise Partnerships (LEPs) and the diverse range of sector groups within the South West region.

The key points to be taken from this theme are:

- Identification of an effective leader is paramount to the success of a South West cluster;
- Ensure balanced representation within the cluster of all areas of the Devon maritime sector;
- A successful maritime cluster should take advantage of existing infrastructure.

3.5 Active promotion of the South West Brand

The concept of using a South West maritime cluster to develop and promote a South West brand was met by approval by the majority of participants. However, it was stated that if a South West brand is to be successful, there would need to be active promotion of the region and investment into the skills, expertise and services provided by industries in the region. One of the main points to recur throughout the event was the current fragmented nature of the skills, knowledge and expertise that is found in Devon. It does not appear at this stage that there are gaps in the goods and services available within the sector but rather that there is little collaborative promotion of the region with most businesses working in isolation. Collaboration and the generation of a South West maritime cluster brand would allow the skills to come together and provide a more cohesive and sustainable sector. By developing effective communication between cluster members and within the sector, it is expected that the brand will develop from a bottom-up approach. Additionally, developing a comprehensive South West maritime sector directory would ensure there is greater understanding of the capabilities of the region. Use of the directory by cluster members to develop their own relationships and promote the South West region would ensure the on-going promotion of the South West brand. Delegates were in favour of the development of a South West brand as they felt it would come to represent a quality of standard for the region's maritime sector and would therefore effectively self-promote. There were some concerns that development of the South West region as a brand may prove limiting in an international market, due to a lack of awareness of regional brands and more focus being placed on the UK as a brand. However, it is proposed that this

could be mitigated for by ensuring effective promotion of the South West brand so that it becomes an industry name and an indication of high standard and quality.

Active promotion of the brand was directly linked to improved communication within and about the region's maritime sector; additionally, it can be linked with ensuring a more thorough understanding of the sector. Promotion of the South West brand will take time and organisation, but the benefits are many. By promoting a South West brand, the region's maritime businesses can work to develop a sustainable regional supply chain. Through increased visibility of businesses, new relationships will be generated, encouraging collaborative activity. This will ensure business profits remains within the region, facilitating investment into the region's maritime sector, generating economic growth, and maintaining a thriving maritime sector.

Within this theme, a number of key points were identified:

- By developing a SW directory, members would have a better understanding of their own sector and the opportunities it provides;
- A cluster could be used to increase promotion of the South West region as a brand, allowing members to be associated with the brand and its high quality standards.
- By working towards promotion of the region as a maritime brand, communication within and about the sector will be improved.

4. Potential barriers and their solutions

Throughout the workshop sessions, delegates were asked to consider what they viewed as being the primary barriers to the successful delivery of a South West Maritime Cluster. Additionally, delegates were encouraged to consider the solutions to these barriers and how they could be addressed for the success of the cluster. It was clear that the barriers identified through the workshop session were perceived barriers, rather than physical barriers to successfully developing a cluster in the region. The main barriers identified were:

- Poor communication
- Limited networking opportunities
- Lack of trust between businesses
- Fear of losing competitive advantage.

While each of these could be looked at as individual issues, all could be dealt with relatively small behavioural changes that could be brought about by the development of a successful cluster. Membership of a cluster would provide enhanced networking opportunities, improve business relationships within the region and reduce the sense of threat associated with collaborative activity.

Although there was a general consensus that a maritime cluster would be beneficial for the South West region, there were concerns expressed regarding the potential for loss of competitive advantage. With knowledge exchange and collaboration being a key element of a successful cluster, companies expressed concerns about the risk this could pose to their individual businesses. However, being part of a successful cluster does not mean a business has to lose its individuality, rather it means it can maintain this by utilising the joint marketing and branding opportunities made available by cluster membership to improve their own market visibility. By working to develop a successful maritime cluster, and using this cluster to promote the South West brand for the regions maritime sector, businesses will have the opportunity to engage in collaborative purchasing schemes, cost saving initiatives and potentially identify new customers. The development of a South West cluster, and therefore the South West brand, would facilitate wide scale promotion of the region's expertise as a whole, increasing the visibility of individual businesses to a wider market.

There were concerns expressed regarding collaborative research and potential issues with intellectual property rights. While this is a valid concern, it should not be viewed as a reason to avoid collaboration. By working together and having a better working knowledge of the sector, and its businesses, higher levels of trust will be developed within the sector, reducing the risk of problems in this area. However, as a form of mitigation, it was suggested that the cluster could work in conjunction with external consultants on any issues surrounding intellectual property. This service could be promoted through the cluster and made available to collaborating businesses through the regular cluster communications.

5. Recommendations and Action Points

Following analysis of the information collected throughout the workshops, a number of recommendations can be proposed.

Firstly, rather than proposing a complete reinvention of a maritime cluster in the region, it is recommended that existing relationships and infrastructure be used more effectively to encourage the development of a successful maritime cluster. In order to be effective, the South West region

being discussed would need to be determined. Based on the workshops, it was clear that this should definitely include Plymouth and Torbay, and would have ‘fuzzy’ boundaries around Cornwall, Dorset and Somerset. Given the success of the Cornwall Marine Network, it would also seem sensible for the South West cluster to ascertain whether there can be any collaboration between the two and whether there can be lessons learned from their experiences. As with all clusters, a South West maritime cluster will need leadership, a clear purpose and trust within the cluster for the potential benefits to be realised. In order for this to be achieved, a full and clear understanding of the sector and the skills it provides is necessary. A simple solution to the current lack of awareness, proposed within the workshops, may be the development of a comprehensive directory of the maritime industries in the South West region. It may be possible for Devon County Council (as partners within the CAMIS project) to work with the database that has already been created as part of the CAMIS project.

In addition to utilising existing infrastructure, it was clear that a South West maritime cluster would require a clear leader with the capacity to disseminate information, promote the benefits of clustering activity for the region, advertise potential collaborative opportunities and encourage relationship building within the region. Additional research will be required to establish who would be the most suitable leader for the cluster. It was suggested during the workshop sessions that the South West maritime cluster should emulate, in some ways, the Cornwall Marine Network and that there could be significant lessons that could be learned from working in conjunction with them.

Throughout the event, it was clear that stakeholders want to avoid generating ‘another layer of support’ and feel it would be more effective for a new cluster to utilise existing infrastructure. Given Devon County Council’s role in organising the Pulling Together event, their role in the development of a maritime cluster was discussed. It was stressed throughout that Devon County Council have a definite role to play in the facilitation of a South West region cluster and there is an opportunity for Devon County Council to facilitate the continuation of a network. It is therefore the recommendation of this report that Devon County Council develops an action plan that will address each of the issues identified throughout the workshops and further consult the region’s stakeholders regarding the logistics and structure of a SW maritime cluster. It is suggested that Devon County Council work in collaboration with BMF, the Chambers of Commerce, Torbay and Plymouth Councils, and utilise the knowledge held by Cornwall Marine Network to work towards making a South West Maritime cluster a reality.

An overarching theme to come out of the CAMIS workshop session was that of the importance of effective communication. This was related to the communication of messages both within the cluster and also promoting the skills and expertise available in the region. Significant efforts will need to be made through adopting innovative communication techniques and ensuring effective communication for promoting the South West brand and cluster. It is the recommendation of this research that more work be conducted into what works and what doesn't – it would be helpful for a cluster to begin with a working knowledge of how best to contact, inform and promote their members. A practical way of achieving this could be through another short event, which would also serve as a second networking opportunity for members. Alternatively, it may be possible to evaluate this through the follow up survey being conducted by the University of Chichester.

Finally, while collaboration with France is a primary component of the CAMIS project, this is not a factor that was well developed during the workshop sessions at the Pulling Together event. Given that the focus of the event was at a county level, and the lack of French delegates attending the event, this was to be expected. However, the recommendations proposed for the improving collaboration within the maritime sector in the South West region could be directly applied to building better cross channel relationships. It is recommended that Devon County Council, as partners of the CAMIS project, make provisions for facilitating the development of these relationships. Additionally, if this is an area that a South West maritime cluster wanted to look into further, this is something both DCC and the University of Chichester could facilitate. The development of new relationships with French partners could create new opportunities for collaboration, knowledge exchange and the generation of best practice.

Based on the above, suggested action points to be taken forward from this first clustering facilitation session are:

- Devon County Council to identify how and when a comprehensive directory for maritime industries in the region can be developed.
- Identification of a cluster leader. No clear leader was identified within the workshop sessions; however, it was highlighted that existing infrastructure and bodies could be used for the benefit of a successful regional cluster.

- Methods for improved communication about and within the sector need to be identified. Communication is a broad theme and therefore this would include identification of effective networking opportunities, communication of collaborative opportunities and raising the profile of the South West brand. This will incur a sector-wide behavioural change and, while it will take time and resources, will bring significant benefits to the region.
- The geographical scope of a South West cluster needs to be ascertained so that cluster efforts can be focused.
- Further evaluation into the potential collaboration opportunities with French maritime industries. As CAMIS partners, DCC and the University of Chichester would be open to facilitating this further.

6. Conclusions

The Pulling Together event made it clear that there is scope and demand for the development of a successful maritime cluster in the South West region. Businesses are aware of the benefits of collaborative activity and are open to examining the opportunities a regional cluster would bring to the area. It is also worth noting that a number of these recommendations tie into the recommendations put forward by the Marine Industries Strategic Framework published in 2011.

Based on the findings, the vision for a successful maritime cluster in the South West region focuses on a range of factors: effective leadership, improved communication between all maritime stakeholders, including the Chamber of Commerce, County Council members and policy makers, opportunities for meaningful networking opportunities and the identification of common goals. As with all businesses, the maritime sector in Devon is working towards economic growth and ensuring long term sustainability for their businesses. Additionally, based on the answers to the preparatory questions, the maritime sector in Devon are keen to expand the scope of a cluster to the entire South West region, working collaboratively to develop a South West brand that could receive both national and international recognition for the skills and expertise available in the region.

The primary theme of the event was that of communication: communication about the possibilities within the Devon maritime sector, effective communication both within and about a maritime cluster should it be successfully developed, communication about opportunities for collaboration and, finally, communication to promote the region's maritime expertise and to develop the South

West brand. With improved communication, through the development of a cluster and effective networking events, trust will be built up between companies, opportunities for collaboration will be identified, saving money and introducing them to new market potential, and a successful maritime cluster will be developed for the South West region.

It is important to note that while there is clear support amongst businesses for the development of a South West regional cluster, the leadership and structure of the cluster would require further work. It would be important for the clusters to identify their purpose and to set this out as a range of goals that can be addressed through a range of initiatives e.g. the development of a SW directory, the production of a cluster newsletter. Achieving these goals will encourage relationship building, improve communication and encourage enhanced levels of collaborative activity within the sector.

Overall, it is evident that there is resounding support for a South West maritime cluster from businesses in the region. If appropriate, the University of Chichester would be happy to work closely with the council, providing additional networking and facilitation support to further cluster activity in the region. The next phase of developing the cluster will be for Devon County Council to work with the region's maritime stakeholders to develop an action plan and identify a leader for the cluster.