



REPORT

MARITIME CLUSTER ACTIVITY
2012 – 2013

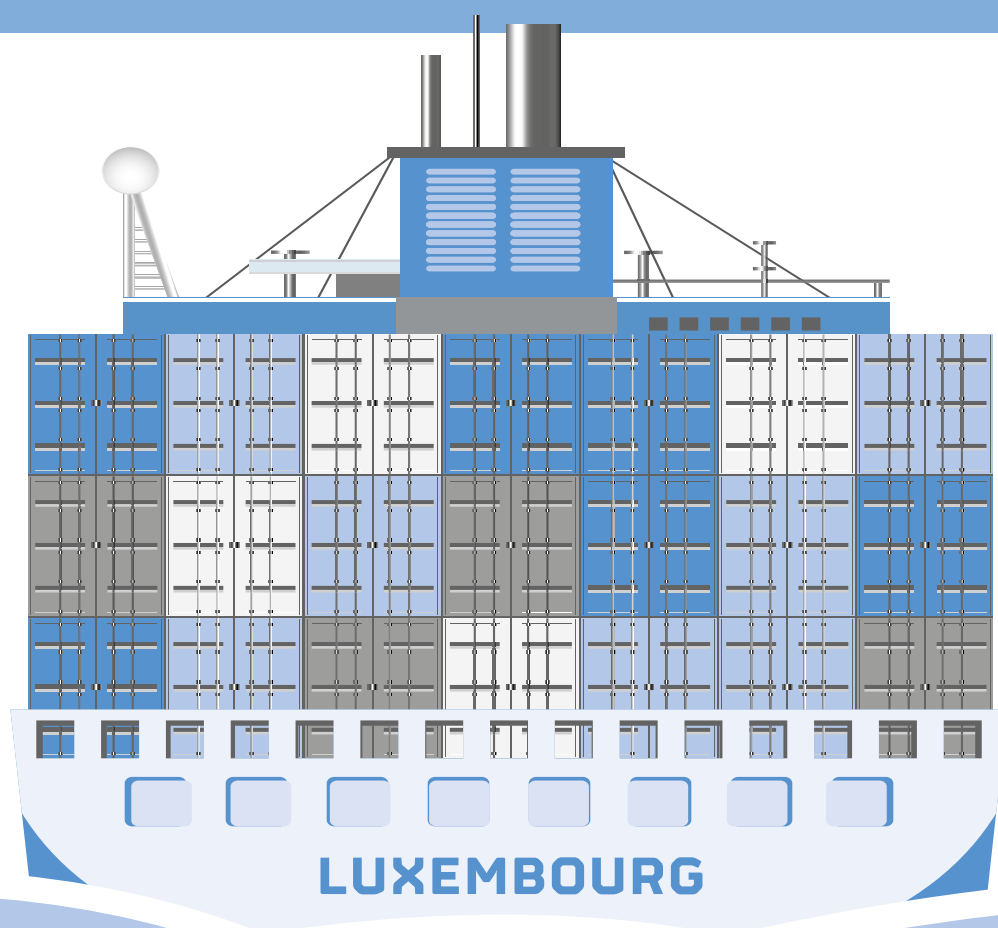


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FOREWORD

This year, the Luxembourg Maritime Cluster (CML) will turn six years old. Founded by sixteen companies, the membership doubled in the first two years to reach forty-five today despite the persisting economic downturn.

In the meantime, the CML has become a powerful and leading trade association whose concerns and suggestions are taken seriously by Luxembourg Government officials.

Indeed, through our joint efforts, the image of the national maritime sector has been improving continuously, both in the domestic context and abroad. The media coverage of our activities and of the sector as a whole is outstanding: more than 150 press articles, TV and radio reports dealt with Luxembourg maritime topics. Each year, 25,000 information-seeking visitors consulted the web site, which has been successfully reshaped and whose number of visits is constantly growing. Even the Luxembourg post office did justice to the Maritime Cluster by issuing two stamps in 2010.

Six to seven events were organized each year and most of them were fully sponsored showing the interest and the strong commitments of our member companies. These gatherings contributed largely to attract new business executives to our wide network of supporters and to make them aware of the importance of the maritime sector.

As a matter of fact, the business opportunities to seize are numerous, both for Luxembourg investors and foreigners willing to set up business in the Grand Duchy. Through competitive intelligence and the organization of high-level targeted business trips, the Maritime Cluster provided a lot of decision makers with valuable insights to develop.

At European level, the CML has achieved great successes in recent years. This track record climaxed at the end of 2012 when the whole European maritime clusters community converged on Schengen for the occasion of the 8th yearly meeting of the European Network of Maritime Clusters (ENMC). Furthermore, this gathering afforded the French-Luxembourg Presidium the opportunity to present its activity report. Last but not least, Mr. Fabrice Maire, member of our Executive Committee and vice-president of the ENMC, represented and spoke on behalf of the whole European maritime sector at major events enabling Luxembourg to enter the limelight.

The CML is widely seen as a success story. Therefore, it is hardly surprising that Mr. Jeannot Krecké, former Luxembourg Minister for the Economy and Foreign Trade, accepted to become the Honorary Chairman of our association, which he considered as one of the most effective clusters in Luxembourg. This success is the result of the commitment, the involvement and the financial support of all our members: whether to celebrate or to work, we can count on their support. For this, we would like to thank all of them.

Freddy Bracke
Chairman

Paul Marceul
Cluster Manager

2012

In a Nutshell

2012 was a year of transition in which long-term projects were prepared, such as the making of a short movie highlighting the assets of the Luxembourg maritime sector or the reshaping of the web site. In the wake of it, the Cluster management also started the renewal of the other communication tools (new roll-up, new letter head, new business cards) in order to present a single visual identity. Different changes were also made to the governance of the association, especially with regards to the differentiation between basic and full membership, in order to make the latter more advantageous in light of the stronger financial support given to the CML.



The CML also increased its role at European level, a trend that culminated in Schengen at the end of the year, and constantly cultivated contacts with decision makers in the Luxembourg government, the administration and the economic community generally. Our association proved to be an excellent platform for lobbying during the negotiations related to the financial law.

Seven new members joined the CML. The Executive Committee met once per quarter, the Board of Directors three times and two General Assemblies were held.

Lobbying – Public relations

The CML introduced itself to several Ministers (Economy and Foreign Trade, Infrastructure and Sustainable Development). The aim of these visits was to present our activities and to discuss and explain the subjects that really matter for the sector. The Executive Committee issued a position paper outlining the challenges of green shipping and the measures that are necessary to take in our point of view. This document was the start of common brainstorming on how to make the Luxembourg registry more environmental -friendly without any competitive disadvantage for ship owners. The CML met several times with European Commission representatives, especially Mr. Bingen, EC representative in Luxembourg.

The CML also launched a joint working group together with the Luxembourg Maritime Authority (CAM). The group met twice and focused on tangible topics such as the dissemination of knowledge, exchange of good practices, difficulties encountered by ship-owners and the administration alike and subjects related to the maritime business development.

The CML also organized a high-level working session on 2013's financial law in order to assess with experts the impact on the maritime business and to promote, whenever possible, alternative solutions. An extensive and well-documented position paper was drafted and sent to all the members of the Luxembourg Parliament.

In 2012, the national and European political aspects of our work were particularly strengthened. Relations with all Ministries and administrations involved in one way or another in the maritime sector have been intensified.



Mr. Freddy Bracke, CML Chairman



Mr. Robert Biwer, Government Commissioner for Maritime Affairs

2012

Networking and Business Development

From the beginning of the year onwards, the CML organized events with a major focus on networking. For the first time, a New Year's Reception of the Luxembourg Ship Owners was organized with around 200 guests, sponsored by CLdN, Jan de Nul and Stena.

CFL Multimodal (CFL MM) invited all the members of the CML to discover the inland container terminal on European Maritime Day. The guided tour by Mr. Fraenz Benoy, Managing Director of CFL MM, was followed by a dinner where the guests could discuss freely topics related to maritime logistics and especially connections from Luxembourg to the major ports of the North Sea.

The CML was one of the main sponsors and co-organizer of the Logistic Business Forum.. The business to business part of this Forum was strengthened and the conference put the emphasis on shipping needs. Mr. Etienne Schneider, Minister for the Economy and Foreign Trade, gave a keynote speech during the closing dinner at the Bourglinster Castle in the presence of the sponsors and their guests.

During the summer, the CML and CLdN invited all the members of the association to an informal after-work meeting – a great occasion to stimulate business relationships between the attending companies.

In September, the CML exhibited at the Monaco Yacht Show, on the stand of Luxembourg for Business. Furthermore, the association supported the organization of Luxembourg Day and arranged a Luxembourg dinner with the kind support of law firm Etude André Harpes.

By mid- year, the Cluster management investigated and developed the opportunities to attract German ship-owners and –operators to the Luxembourg Register as a result of political changes in the German maritime policy regarding the choice of flag.. H.E. Mr. Hermann Ebel, Luxembourg Honorary Consul and Hamburg-based ship-owner, was invited to Luxembourg to express himself on the possible synergies between the German and Luxembourg maritime sectors. Together with the Maritime Authority, we also went on reconnaissance in Hamburg on the occasion of the SMM trade fair and met up with Germanischer Lloyd's top management.

European Network of Maritime Clusters

Since the end of the year 2011, the CML has become more active within the European Network of Maritime Clusters (ENMC) and two of its representatives, Mr. Fabrice Maire and Mr. Paul Marceul, have taken on respectively the positions of Vice-President and General Secretary of the network.



Mr. Etienne Schneider, Minister for the Economy and Foreign Trade



Mr. Fabrice Maire, ENMC Vice-President



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2012

On October 18th and 19th 2012 representatives from all over Europe and the European Commission converged on Schengen (Luxembourg) on the occasion of the 8th yearly meeting of the European Network of Maritime Clusters. The maritime clusters of Bulgaria, Denmark, France, Germany, Italy, Norway, Portugal, Spain, Sweden, United Kingdom and Ireland delegated their respective managers or officials to attend. H.E. Mr. Schneider, Luxembourg's Minister for Economy and Foreign Trade, addressed a welcome speech to the participants during a dinner with several Directors of the cluster. Immediately after the meeting, which was largely covered by the European media and in presence of the European maritime business community, Mr. Jeannot Krecké, former Minister for the Economy and Foreign Trade, was appointed Honorary Chairman of the CML.

This annual gathering gave the opportunity to take stock of the work accomplished by the French-Luxembourg Presidium and to plan further actions under our co-leadership.



Mr. Francis Vallat, ENMC Chairman



Mr. Michel Jadot, CLdN Managing Director

The participants in this meeting all stressed the new impetus given by France and Luxembourg to the ENMC through numerous initiatives: the new logo and web site (www.enmc.eu), the monthly newsletter and lobbying at the European Commission. Furthermore, the attendees all agreed upon the necessity of a large survey funded by the European Commission assessing and possibly quantifying the economic weight of the European maritime sector in the economy. Hand in hand with the French Maritime Cluster, our association prepared the groundwork for this survey by elaborating a common matrix and gathering initial data. In this context, the Luxembourg and French Maritime Clusters presented the ENMC and its concerns to the MARE Directorate-General.



Mr. Fraenz Benoy, CFL Multimodal



*Mrs. Marie-Hélène Trouilleux, Chamber of Commerce,
Mr. Marc Glodt, lawyer*

2012

Fostering Maritime knowledge

The CML organized two conferences which were followed by a networking reception. The first one, on May 3rd, saw an intervention by Mr. Claes Berglund, Director of Public Affairs and Sustainability at Stena International. The presentation entitled "Turbulent times for shipping companies with many opportunities and threats – a presentation from a Stena perspective" shed an interesting light on the challenges for shipping when fuel is getting more expensive, new environmental and labour legislation is tightening the rules of the game and global shipping is experiencing a profitability problem – despite a good general growth.

For the second conference, the CML gave the floor to Mr. Jean-Bernard Raoust, Chairman of BRS International, who delivered a lecture on the maritime economy. BRS is one of the largest ship broking companies worldwide and issues an authoritative yearly review assessing the world shipping and shipbuilding markets.



Mr. Jean-Bernard Raoust, Chairman of BRS International



Messrs Dentzer and Gosselin, Banque internationale à Luxembourg

Communications

Two big CML communication projects were started in 2012. On the one hand, the Executive Committee, Cluster Management and a dedicated working group prepared a "teaser" movie aiming to attract new maritime investors to Luxembourg. The working group met on a regular basis, gathering movie rushes and pictures from some of our ship-owning members and defining the specifications and the scenario for the movie to be produced.

On the other hand, the Cluster Management reconsidered the whole web site and drafted a concept for the reshaping to come in 2013. Several communications tools were also revamped during the year.

Day-to-Day Management

Through several advertising campaigns, the Cluster Management recruited seven new members. A questionnaire was also sent to existing members to get feedback, both on past actions (great satisfaction score) and actions to be included in the roadmap for the following year. The press releases lead to around a dozen articles in the Luxembourg press.

2013

In a Nutshell

2013 was marked by Germany. Around 20 ships controlled by German ship owners joined the growing number of vessels registered in Luxembourg. The CML carried on with its efforts in order to make investors aware of the business-friendly legal and regulatory framework, the rewarding tax environment for investors, the political and administrative stability, and the presence of highly skilled and multilingual service providers in Luxembourg. Presentations were made in Hamburg, a short movie was produced and the web site was reshaped, all dealing with the advantages of choosing Luxembourg as an alternative location for the shipping business. In Luxembourg, we strengthened the competitive intelligence efforts by subscribing to several newspapers and newsletters. Member companies got twenty or so alerts with valuable information for their business. The groundwork for a survey on Luxembourg's Blue Economy has been done and first estimations were published in the Luxembourg press.



In June 2013, the Cluster Management moved from the Chamber of Commerce to a new, bigger office in the centre of Luxembourg-City (3-7, rue Schiller).

Five new members joined the CML, the Executive Committee met five times, the Board of Directors twice and two General Assemblies were held.

Lobbying – Public relations

The joint working group Maritime Cluster – Maritime Authority started work again at the end of February. The main subjects were the launch of a statistical survey on the maritime business in the Grand Duchy of Luxembourg and the thoughts about a green shipping initiative proposed by the Luxembourg Government and supported by the CML. The CML started the groundwork for the above mentioned survey by drafting a form to be filled in by Luxembourg shipping companies and collecting data about the impact of the blue economy. The results, which should be available in March 2014, are expected to reinforce the image of the national maritime sector and demonstrate its promising opportunities. Both the Ministry for the Economy and Foreign Trade and the Ministry for Sustainable Development and Infrastructure support the initiative



Mrs. Karin Schintgen and Mrs. Anne-Marie Grieder



Messrs David Luttj and Robert Biwer



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This is a service we offer using our network of partner companies, comprising experts from the financing and shipping sectors. This allows us to deliver real industry insight, clarity as well as a global outlook.

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2013



Messrs Yann Holpert and Cédric Rath



Panellists in the round table

Networking and Business Development

For the second time, the CML held a New Year's reception sponsored by four Luxembourg ship-owners: CLdN Cobelfret, CLdN Ro-Ro, DEME and Jan de Nul.



Messrs De Bruyn and Bernard



2013's New Year Reception

In February 2013, Messrs Fabrice Maire and Paul Marceul went to the Euromaritime trade fair, which has been created under the patronage of the European Network of Maritime Clusters. The aim of this visit was to get an idea of its advantages with a view to the participation of Luxembourg companies. A report of the visit was sent to the Ministry for the Economy and Foreign Trade, stressing the importance of this new event and suggesting the organization of a visit by Luxembourg companies.

On May 13th, the CML was one of the main exhibitors and sponsor of the second Logistics Business Forum. As such, all the member companies of the CML were invited to attend the conferences and the networking lunch.

On May 17th, several representatives of FEDIL shipping and ship owners from the CML met up in order to discuss the implementation progress of the Maritime Labor Convention, 2006.

On June 13th, RPMG and the CML invited members of the maritime business community, the press and officials to the so-called "Pot du Cluster" (informal drinks). The lectures preceding the cocktail were about the next initiatives of the CML, a comparative overview of different European registries and the new International Financial Reporting Standards. Fifty guests converged on the RPMG building for this event which was widely covered by the press.

2013

The main business initiative started in 2013 was about the need for German ship owners to reflag in Europe at least 60% of the controlled fleet in the coming years. Since Luxembourg has a card to play in this respect, we supported a joint initiative of our members Deloitte and RPMG in order to make Luxembourg better known to German ship-owners. The CML, together with the Government Commissioner for Maritime Affairs and the Honorary Consul of Luxembourg in Hamburg, organized a high-level business lunch in the Übersee-Club during which presentations about Luxembourg were made to the ten represented ship owners and the German Ship Owners' Association (VDR).

The CML launched a working group on the German ship owners which met three times and worked on a comprehensive comparison of European ship registers. The CML contacted the VDR in order to contribute to one issue of their magazine (Deutsche Seeschifffahrt) by writing an article about Luxembourg.

On December 11th, the CML participated in the Cluster Forum staged by the Luxembourg Cluster Initiative. The aim of the gathering was to present the strategies of the eight Luxembourg clusters and to discuss the opportunities for cross-sectorial collaboration and business development. The CML stressed the necessity to foster interclustering and brought forward possible areas of cooperation with other sectors (BioHealth, ICT, Materials...)



*Mr. Paul Marceul, Cluster Manager
and Mr. David Donzel, Marsh*



Mr. Freddy Bracke, Chairman



Mr. Philippe Goutière, AIG Europe



Mr. Alex Kemp, NYA International

2013

European Network of Maritime Clusters

Messrs Fabrice Maire and Paul Marceul continued in their respective positions of Vice-President and Secretary-General of the European Network of Maritime Clusters (ENMC). On their behalf (and that of the French Presidency), about twenty circular letters were sent with valuable information about European politics or forthcoming initiatives.

Luxembourg intensively participated in the efforts to collect data about the actual weight of the European Maritime sector and in the lobbying effort towards a major survey funded by the European Commission, with the ENMC having an advisory role.

Mr. Maire represented the Chairman in Varna, Bulgaria, on the occasion of the international congress "Blue Growth in the Black Sea region – perspectives and opportunities" and delivered a speech on cluster cooperation and the role of the ENMC. Furthermore, he presented the achievements of the CML during a session dealing with the leading maritime clusters in Europe.

Mr. Marceul attended and co-organized the annual meeting of the European Maritime Clusters on September 26th and 27th in Lisbon. It was the occasion to highlight the latest actions undertaken by the CML and to exchange best practices with cluster managers from all over Europe.



Messrs Marceul, Vallat (ENMC Chairman),



*On the left, Mr. Manuel Pinto de Abreu,
Portuguese Secretary of State of the Sea*



ENMC Yearly meeting in Lisbon – group photo



Mr. Marceul, Mesdames Czarnecka-Gallas and Solbakken

The Port of Mertert



Located on the municipalities of Mertert and Grevenmacher on the left bank of the Moselle, the Port of Mertert has a total area of 65 hectares. Both docks along the port basin, on which are installed 10 rolling cranes with a lifting force of 12 to 35 tons, have a total length of 1,600 meters. The transshipped products are mainly steel products upon arrival and departure of Arcelor-Mittal plants installed in Luxembourg, petroleum products, coal, agricultural products and construction materials.

During all the years of its existence the Port of Mertert has made the economy of Luxembourg benefit from competitive transshipping prices and proper service. It also managed to defend the interests of inland water transport whose qualities do not need to be praised (environmental protection, reliability, safety, etc.).

Inland water transport ensures a high degree of safety, especially for the transport of dangerous goods. Finally, it contributes to disburden overloaded road networks in areas with high density.

In front of the backdrop of the ideal strategic location of the Port of Mertert representing a unique site in Luxembourg comprising the three transportation modes and allowing a transshipment from river, rail and road, the company of the port with the support of the Ministry of Sustainable Development and Infrastructure, together with their handlers, expends every means at its disposal to ensure the sustainability of the Port of Mertert. Thus, it is particularly foreseen to expand the tracks of arrival and departure of 4 railroads, increasing to 8 the number of available tracks. In parallel the connection of the shunting tracks with the tracks of arrival and departure will be achieved through double tracks. In a nutshell,

"The Port of Mertert is designed to meet the needs of the development of the economy of Luxembourg. Connections by river, rail and road contribute to its proper insertion in the trans-European transport networks."



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2013

Fostering Maritime knowledge

Together with leading insurer AIG, the CML invited the Luxembourg maritime community to an exceptional conference on June 27th dealing with one of the major actual concerns of ship-owners: piracy. Mr. Gregory, Head of a unit dealing with kidnap and ransom at AIG Property & Casualty, explained the perception of the insurer in terms of loss history, risk selections, security measures and trends. Furthermore, he broadly described the existing insurance market and the developments to be expected. Mr. Kemp, Managing Director at NYA International Limited, presented the immediate considerations for a ship-owner faced with pirates on board and explained step by step how to secure the safe release of the crew, the vessel and the cargo. He reviewed the course of events during a hijack from the initial contact with the pirates via the possible ransom payment through to the vessel's release. Additionally, he outlined the importance of strategy and stakeholder management and assessed the challenges of negotiation, pirate threats and tactics. The conference was followed, as usual, by an informative networking reception.

The CML organized a conference entitled "Keen on Green: Shipping Industry Facing Environmental Challenges" on July 17th 2013. The lecture was opened by a statement by Mr. Biwer, Government Commissioner for Maritime Affairs. Mr. Dan A. Lingenberg, Director of Couple Systems GmbH, a Hamburg-based company, presented several solutions in order to comply with EU regulations on emissions. He particularly put the emphasis on the dry scrubber technology developed by his company which might provide an interesting solution to ship owners confronted with these strict emission limits in the European Sulphur Emission Control Areas (SECAs). The conference was followed by a cocktail reception, in the presence of numerous representatives of ship owners, audit & consulting firms, lawyers and bankers from Luxembourg and abroad. The conference was held within the framework of a workshop addressing the Maritime Labor Convention organized by the Luxembourg Maritime Authority the day after.

On November 18th the ship owner CLdN, the tax advisor Deloitte and the CML arranged a business luncheon about the revised bi-lateral tax agreement between Singapore and Luxembourg. The presentation focused on the implications for the shipping sector and was attended by selected ship-owner representatives.

Together with law firm OPF Partners and the Luxembourg University, the CML organized a conference on the prerogatives of the flag state on November 26th. This is was a dual-purpose initiative: on the one hand, and given the fact that it is vital for the future of the Luxembourg maritime sector to continue to develop further local expertise, we wanted to open up new horizons for the students invited from the Greater Region (Luxembourg and Nancy) and on the other hand the CML wanted to update the stakeholders of the prerogatives and duties of the state, especially (but not only) in the context of the Maritime Labour Convention.

The first lecture was given by Dean Cachard, who is, as recognised expert in maritime law, active in the Maritime Arbitration Chamber of Paris (C.A.M.P.) and teaching at the University of Lorraine.



Yann Hilpert, OPF Partners



Dean Cachard

2013

The CML turns five

On October 2nd, the CML held the last Board of Directors meeting and General Assembly of the year 2013. The meetings were the occasion to review and comment on five years of cluster activity and to celebrate this anniversary, first with a members-only lunch and then with a showing of the impressive Danish movie "A Hijacking", followed by a well-attended cocktail reception.

Communications

The Cluster Manager wrote two articles for the AGEFI (in March and October 2013), giving a comprehensive overview of the national maritime sector and its added value for the Luxembourg economy as a whole.

By mid-2013, the CML presented its new web site. So far, nearly 5,000 persons have visited the web site each month. All the content is in English but there is also a Q&A in Luxembourgish. A photo gallery, a news section and an online application form have been added to the new version. The national promotion agency Luxembourg for Business also spread the news of the launch through its network (Facebook, LinkedIn with more than 2,000 followers) a couple of weeks later ensuring maximum exposure for our activities.

Finally and after one year's work, the dedicated working group launched the final phase of the project aimed at producing the promotional movie on the maritime sector in Luxembourg. The movie will illustrate arguments speaking for Luxembourg as an alternative location for shipping business and will be accessible via several Luxembourg web sites.

Day-to-Day Management

In addition to the above mentioned initiatives, the Cluster Management has pursued its efforts with regards to the development of the network. Five new members joined the initiative and many others were approached.

The Cluster Management continued to forward relevant information to the members of the CML.

The Cluster Manager was interviewed for a feature story in the Paperjam magazine (October 2013), the Luxemburger Wort (October 2013) and Focus, the magazine of Luxinnovation (December 2013). Furthermore, the Luxembourg Cluster was mentioned in five articles with regards to its fifth anniversary and three articles related to its role in the ENMC (Le Marin, Fairplay and Merkur). ENMC Chairman Mr. Vallat and Cluster Manager Paul Marceul co-wrote an article on European maritime clusters entitled "Backs to the ocean?" for the Pan European Network Magazine.



DO YOU ENJOY WHAT WE DO?

APPLICATION FORM

Created in 2008 as a non-profit organization, the CML (CML) brings the Blue Economy of the Grand Duchy to the fore. Forty-five companies and institutions proudly and convincingly represent the local maritime business community, nationally as well as internationally. Members of the Cluster offer together a wide variety of maritime business experience and expertise: shipping, dredging, classification, ship brokerage, banking, law, consultancy & audit, insurance, security and safety, railway and maritime logistics. The CML holds the Vice-Presidency and the General Secretary of the European Network of Maritime Clusters. <http://www.cluster-maritime.lu>

Applying company

Full name and legal form:

Full address:

City: ZIP / Postal code:

Web site:

Person to be the usual representative at the CML

Name:

Job title:

Cell phone: Telephone:

E-mail:

Other e-mails to be included in the distribution list

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Logo on the web site	✗	✓
Becoming Director	Limitation	✓
Free participation in events (excluding travel costs) for two representatives	✗	✓
Sponsoring opportunities	✗	✓
Dissemination of information related to your company by the Maritime Cluster	✗	✓

Please read carefully the Articles of Association of the CML before submitting your application. Download it from our web site. Do not forget to attach a brief description of your company, especially of your range of services in the maritime business.

Date and signature:

CLdN 



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CLdN Terminals S.A. (Terminal Activities)

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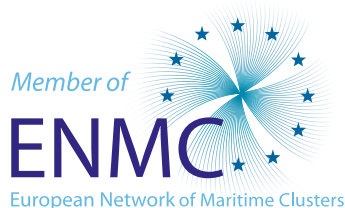
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