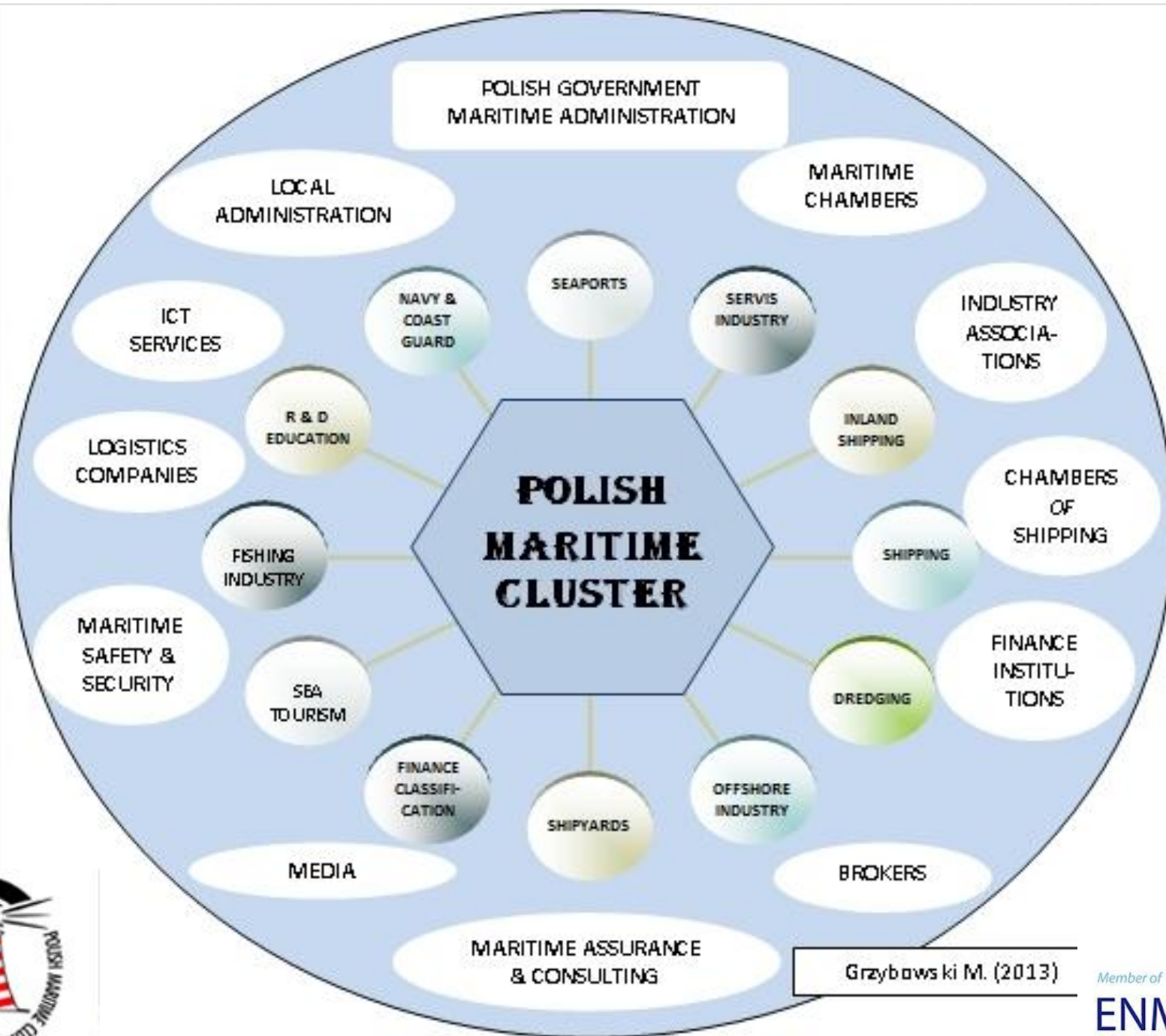




POLISH MARITIME CLUSTER





Grzybowski M. (2013)



POLISH MARITIME CLUSTER

- **Founded 2009**
- Over 90 members from maritime industry
 - **Activity**
- Cooperation in the area of the Polish and international maritime industries, including maritime clusters
- B2B marketing and international projects in the Baltic Sea Region, European Union and global market
- Cooperation with the parliament, government and local administrations
- Knowledge transfer between business, universities and administration
- Education and market research
- Conferences and seminars



PARTNERS

- Polish Chamber of Maritime Commerce
- Polish International Freight Forwarders Association
- Forum Okretowe/ Shipbuilding Industry Forum
- Employers Pomerania Chamber
- Regional Chamber of Commerce Pomerania
- **CLUSTERS**
 - Westpomeranian Maritime Cluster, Szczecin
 - Maritime Cluster of Westpomerania
 - Pomeranian River CLuster



POLISH MARITIME CLUSTER

EU PROJECTS

- **KNOWLEDGE TRANSFER** between business and universities
<http://keiz.wpit.am.gdynia.pl/en/>
- **StarDust BSR Project** <http://www.bsrstars.se/stardust>
- **MariTime Hubs** <http://www.maritimehubs.fi>
- **Bothnian Green Logistic Corridor** <http://www.bothniangreen.se/>
- **MARTEC** <http://www.martec-era.net/partnersearch>
- **EUSBSR** <http://www.balticsea-region-strategy.eu/>
- **INTERACT** <http://www.interact-eu.net/>



The Polish entities of national economy whose the basic activity is connected with maritime economy

The Statistical Yearbook of Maritime Economy 2012					W tym Of which				
WYSZCZEGÓLNIENIE SPECIFICATION		Ogółem Grand total	przedsiębiorstwa państwowe state owned enterprises	spółki handlowe commercial companies			spółki cywilne civil law partnerships	osoby fizyczne prowadzące działalność gospodarczą natural persons conducting economic activity	
				razem total	w tym of which				
					akcyjne joint-stock	z ograniczoną odpowiedzialnością limited liability			jawne unlimited partnerships
OGÓŁEM TOTAL	2008	10882	2	1303	60	1098	140	837	8675
	2009	10955	2	1565	65	1339	152	874	8428
	2010	10915	2	1694	76	1449	155	893	8226
	2011	11064	2	1792	74	1526	160	901	8259



Investment outlays

Investment outlays, The Statistical Yearbook of Maritime Economy 2012					
WYSZCZEGÓLNIENIE SPECIFICATION		Ogółem <i>Grand total</i>	Nowe obiekty majątkowe oraz ulepszenie istniejących ^{a)} <i>New assets and improvement of already existing ones ^{a)}</i>		Zakup używanych środków trwałych <i>Purchase of second-hand fixed assets</i>
			razem <i>total</i>	w tym z importu <i>of which imported</i>	
		w mln zł <i>in mln zł</i>			
OGÓŁEM <i>TOTAL</i>	2008	1221,0	1146,6	105,2	74,3
	2009	1102,7	925,5	68,7	177,2
	2010	1303,3	1062,2	76,3	241,1
	2011	1753,8	1658,3	169,0	95,5

Investment outlays are financial or tangible outlays, the purpose of which is the creation of new fixed assets or the improvement (rebuilding, enlargement, reconstruction or modernization) of existing capital asset items, as well as outlays on so-called initial investments.



Polish ports container connections



Polish ports container connections



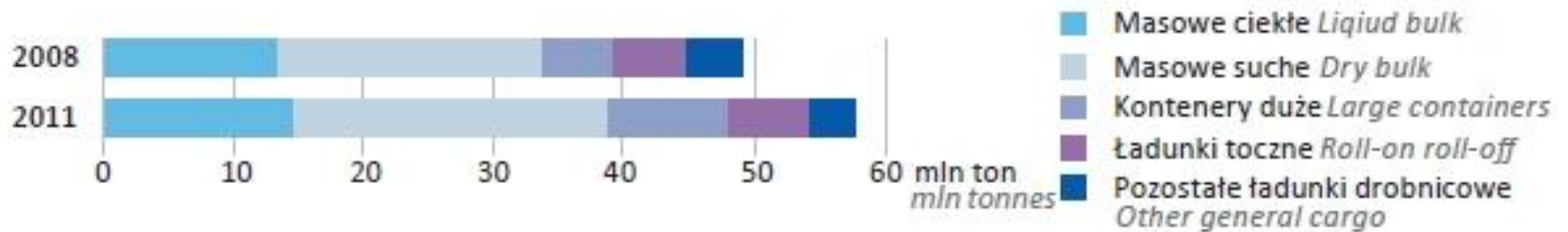
Polish main container terminals

- Deepwater Container Terminal - Port of Gdańsk
- Gdański Terminal Kontenerowy - Port of Gdańsk
- Baltic Container Terminal (ICTSI Group) - Port of Gdynia
- Container Terminal S.A. (Hutchison Port Holdings) - Port of Gdynia
- DB Port Szczecin (Deutsche Bahn) Port of Szczecin-Świnoujście

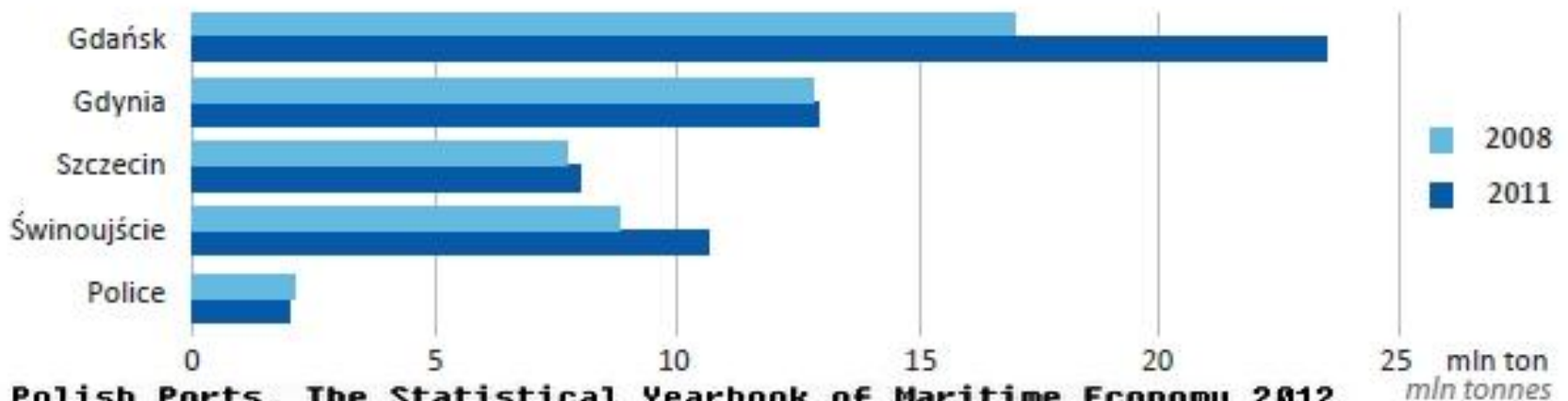


Polish ports

OBROTY ŁADUNKOWE OGÓŁEM CARGO TRAFFIC TOTAL



OBROTY ŁADUNKOWE W GŁÓWNYCH PORTACH MORSKICH CARGO TRAFFIC IN MAJOR SEAPORTS



Polish Ports, The Statistical Yearbook of Maritime Economy 2012



Polish ports - container turnover



■ Gdynia ■ Gdańsk ■ Szczecin-Świnoujście

Marek Grzybowski



Polish ports



Polish ro-ro/ferry terminals

Ferry Terminal Świnoujście
Baltic General Cargo Terminal
Gdynia Ferry Terminal
Polferries Ferry Terminal (Gdańsk)



Polish maritime and coastal shipping

LATA YEARS	Przybyło <i>Newcomers</i>			Ubyło <i>Decrease</i>			Stan w dniu 31 XII <i>As of 31 Dec</i>		
	liczba statków <i>number of ships</i>	nośność ^{a)} (DWT) w tys. t <i>dead- weight ^{a)} (DWT) in thous. t</i>	pojemność brutto (GT) w tys. <i>gross ton- nage (GT) in thous.</i>	liczba statków <i>number of ships</i>	nośność ^{a)} (DWT) w tys. t <i>dead- weight ^{a)} (DWT) in thous. t</i>	pojemność brutto (GT) w tys. <i>gross ton- nage (GT) in thous.</i>	liczba statków <i>number of ships</i>	nośność ^{a)} (DWT) w tys. t <i>dead- eight ^{a)} (DWT) in thous. t</i>	pojemność brutto (GT) w tys. <i>gross tonnage (GT) in thous.</i>
2008	8	166,5	124,7	6	34,3	30,5	123	2613,7	1930,8
2009	7	227,6	142,4	10	179,6	122,4	120	2661,7	1950,8
2010	12	468,2	292,8	11	188,3	133,1	121	2941,5	2110,5
2011	8	223,0	147,6	21	233,5	218,9	108	2931,0	2039,2

Polish maritime and coastal fleet, The Statistical Yearbook of Maritime Economy 2012

^{a)} Łącznie ze zmianami wynikającymi z przeklasyfikowania statków.

^{a)} Including changes due to re-classification of the ships.



Polish shipping

Polish shipowners

- Polska Żegluga Morska (71 ships, 2,650,000 DWT, 64 bulk carriers, 3 sulphur carriers and 4 ferries)
- Chipolbrok (Chinese-Polish Joint Stock Shipping Company, 17 geared, semi-container triple-deckers, DWT over 395,000
 - Pol Euro Linie Żeglugowe SA (4 ships, 14000 DWT)
- Pol Levant Linie Żeglugowe Spółka z o.o. (2 ro-ro ships, 18,000 DWT)
 - Unibaltic (8 ships 3,000-8,000 DWT)
- Polska Żegluga Bałtycka SA (POLFERRIES, 3 ferries)
 - Unity Line Sp. z o.o. (7 ferries)
- Euroafrica Shipping Lines Cyprus Limited (7 ships, 3 ferries)



Polish Shipbuilding and Shiprepair Industry

TYPY STATKÓW a – liczba statków b – nośność (DWT) w tys. ton c – pojemność brutto (GT) w tys.		Completions by ship type				SHIP TYPE a – number of ships b – deadweight (DWT) in thous. tonnes c – gross tonnage (GT) in thous.
		2008	2009	2010	2011	
Promy	a	1	1	3	7	Ferries
	b	0,1	.	.	.	
	c	0,9	1,7	5,0	20,3	
Statki rybackie	a	-	-	2	3	Fishing
	b	-	-	.	.	
	c	-	-	0,8	7,4	
Statki nietowarowe	a	3	12	15	1	Non-cargo carrying
	b	1,1	.	.	.	
	c	1,2	18,0	21,8	3,0	
Offshore	a	3	-	-	-	Offshore
	b	6,2	-	-	-	
	c	6,8	-	-	-	

Shipbuilding and shiprepair industry, The Statistical Yearbook of Maritime Economy 2012



Polish Shipbuilding and Shiprepair Industry

Polish Shipyards

Gdańska Stocznia "Remontowa"

Nauta Shiprepair Yard

CRIST SA

Gdansk Shipyard SA

Szczecin Ship Repair Yard GRYFIA JSC

Morska Stocznia Remontowa S.A. in Świnoujście



Polish Shipbuilding and Shiprepair Industry

ORDER BOOK

As of 31 Dec Polish Shipbuilding and shiprepair industry, The Statistical Yearbook of Maritime Economy 2012

WYSZCZEGÓLNIENIE	2008	2009	2010	2011	SPECIFICATION
OGÓŁEM TOTAL					
Liczba statków	64	25	21	22	Number of ships
Nośność (DWT) w tys. t	1139,2	.	.	.	Deadweight (DWT) in thous. t
Pojemność brutto (GT) w tys.	1205,3	67,1	83,8	77,9	Gross tonnage (GT) in thous.
CGT w tys.	918,6	129,7	117,6	146,9	CGT in thous.

SHIP REPAIR ORDER BOOK

As of 31 Dec

Polish Shipbuilding and shiprepair industry, The Statistical Yearbook of Maritime Economy 2012

WYSZCZEGÓLNIENIE	2009	2010	2011	SPECIFICATION
OGÓŁEM TOTAL				
Liczba remontów	169	194	278	Number of ship repairs
euro	45750,7	81369,6	90895,8	Value in mln euro



Polish Shipbuilding and Shiprepair Industry

Newbuildings

Heavy Lift Jack-up vessels, PSV vessels and offshore constructions, platform supply vessels, ferries, container and multipurpose vessels, LNG tankers, car-passenger ferries LNG fuelled, double-ended ferries, fire fighting and rescue vessels, tugboats, barges, ice – breakers, dredgers, fishing trawlers, anchor handling towing supply vessels, rapid intervention vessels, ice breaking emergency evacuation vessels, dredgers, floating docks



Polish Shipbuilding and Shiprepair Industry

PRODUCTION OF OTHER SHIPS AND THE SEA GOING VESSELS ^{a)}

WYSZCZEGÓLNIENIE SPECIFICATION		Produkcja wytworzona <i>Production completed</i>	Produkcja sprzedana <i>Production sold</i>	
		w szt. <i>in units</i>		w tys. zł. <i>in thous. zł</i>
Jachty pełnomorskie <i>Sea-going yachts</i>	2008	1194	1218	149064,1
	2009	521	522	150140,6
	2010	535	528	151662,5
	2011	626	627	184182,0
Kadłuby statków pełnomorskich <i>Sea-going ships' hulls</i>	2008	83	53	369855,2
	2009	68	40	355297,7
	2010	19	18	47101,2
	2011	44	42	284019,2

^{a)} Dane dotyczą podmiotów gospodarczych, w których liczba pracujących przekracza 9 osób.

^{a)} Data concern entities employing more than 9 persons.

Shipbuilding and shiprepair industry, The Statistical Yearbook of Maritime Economy 2012



Polish Shipbuilding and Shiprepair Industry

Repairs and conversions of ships

container vessels into car carriers, crude oil tankers into heavy lift vessels, deep water tugboats and fishing trawlers into offshore vessels, tanker into shuttle tanker, ro-ro vessels into cable ship, passenger ferries and Ro-Pax vessels, conversions / upgrades shuttle tankers, FSO, heavy lift vessels, support vessels, semi submersible drill rigs, accommodation units,



Polish Fishing Industry

FISHING FLEET BY OWNERSHIP AND SHIPTYPE

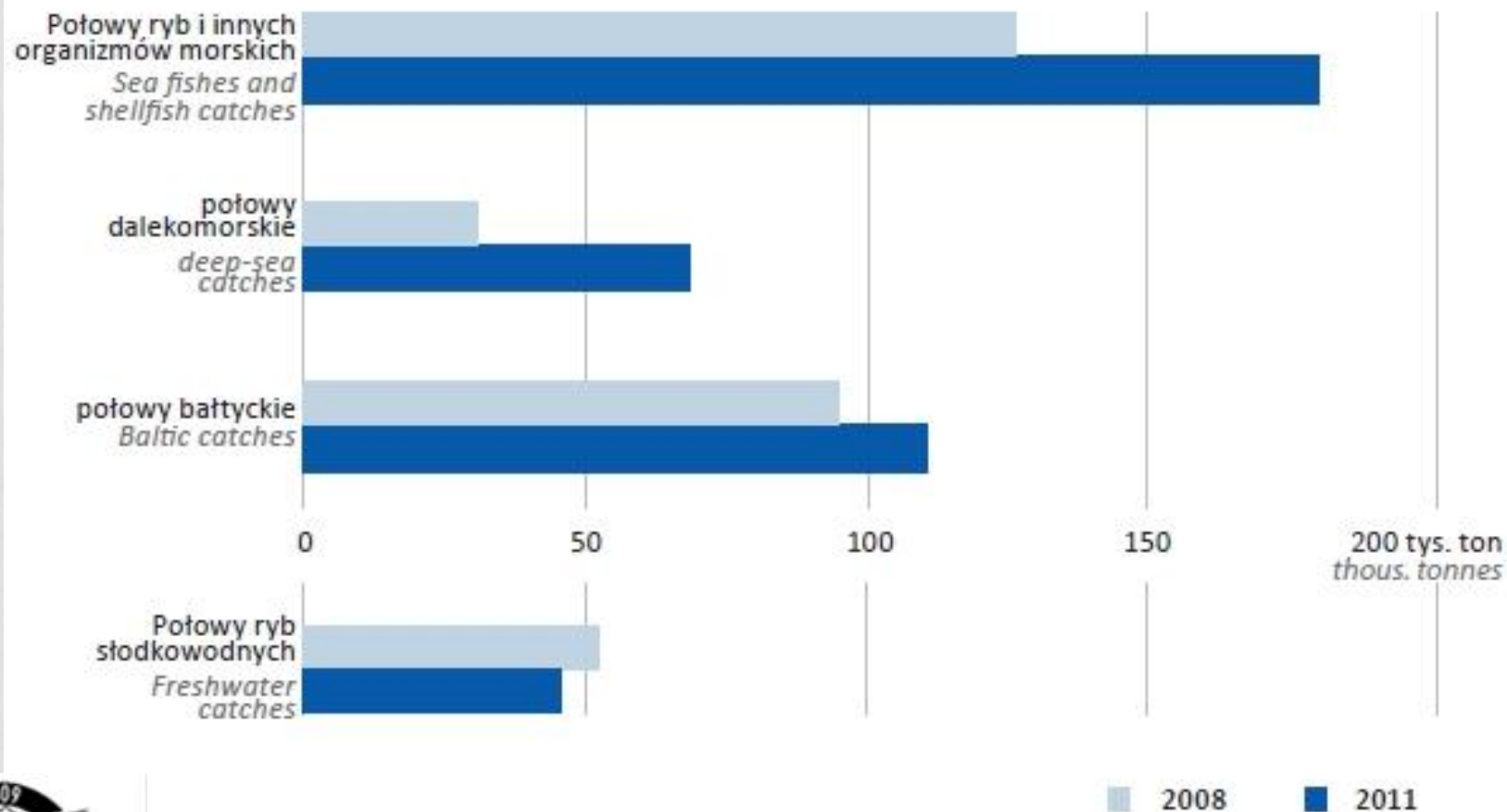
Polish Fishing industry, The Statistical Yearbook of Maritime Economy 2012

WYSZCZEGÓLNIENIE SPECIFICATION					
a – jednostki pływające ¹⁾ floating craft ¹⁾					
b – pojemność brutto (GT) w tys. gross tonnage (GT) in thous.		2008	2009	2010	2011
c – moc w tys. kW power in thous. kW					
OGÓŁEM TOTAL	a	832	806	793	790
	b	41,0	38,2	37,3	33,4
	c	99,0	90,7	86,9	82,9



Polish Fishing Industry

POŁOWY RYB I INNYCH ORGANIZMÓW MORSKICH ORAZ RYB SŁODKOWODNYCH SEA FISHES, SHELLFISH AND FRESHWATER FISHES CATCHES



sh Fishing industry, The Statistical Yearbook of Maritime Economy 2012



Polish Fishing Industry

FISH PROCESSING PRODUCTS ^{a)}

WYSZCZEGÓLNIENIE SPECIFICATION	2008	2009	2010	2011
	w tys. ton in thous. tonnes			
Ryby morskie (wraz z filetami) mrożone <i>Frozen & chilled fish</i>	44,7	44,8	44,2	43,9
Filety solone ^{b)} <i>Salted fillets ^{b)}</i>	17,8	12,3	14,1	15,6
Ryby (wraz z filetami) wędzone ^{b)} <i>Smoked fish ^{b)}</i>	77,4	75,1	83,0	80,5
Filety z ryb morskich, świeże lub chłodzone <i>Filets of marine fish, fresh or chilled fish</i>	19,0	14,1	14,0	15,8
Filety rybne w bułce tartej lub panierce, włączając paluszki rybne ^{b)} <i>Fish fillets in bread roll tartej or panierce, includ- ing fingers fish ^{b)}</i>	5,2	11,3	12,2	11,4
Ryby i przetwory rybne ^{b)} zakonserwowane, marynowane lub prezerwowane <i>Fish preparations ^{b)}</i>	136,4	153,6	150,9	158,2
konserwy rybne <i>tinned fish</i>	41,3	45,0	50,0	53,1
marynaty rybne <i>pickles fish</i>	81,9	93,1	82,8	84,0
prezerwy rybne <i>preserved fish</i>	13,2	15,5	18,1	21,1

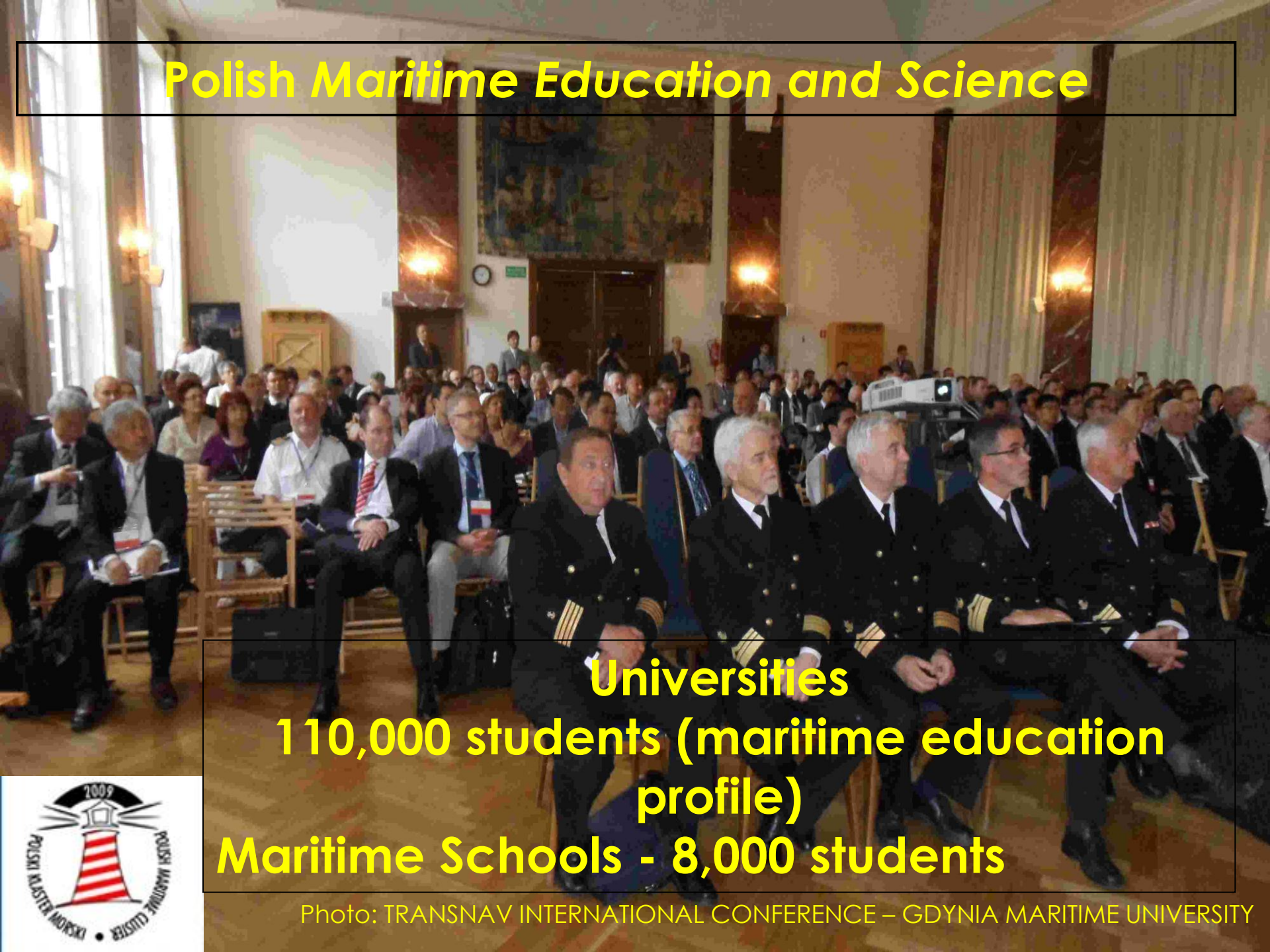
^{a)} Dane dotyczą podmiotów gospodarczych, w których liczba pracujących przekracza 9 osób. ^{b)} Z ryb morskich i słodkowodnych.

^{a)} Data concern enterprises employing more than 9 person. ^{b)} Made of sea and freshwater fish.

Polish Fishing industry, The Statistical Yearbook of Maritime Economy 2012



Polish Maritime Education and Science



Universities
110,000 students (maritime education profile)

Maritime Schools - 8,000 students



Photo: TRANNAV INTERNATIONAL CONFERENCE – GDYNIA MARITIME UNIVERSITY

Polish Maritime Education and Science

Universities

- Gdynia Maritime University,
- Maritime University of Szczecin
- Gdansk University of Technology,
- University of Gdansk,
- University of Szczecin
- West Pomeranian University of Technology
- Polish Naval Academy

Schools

- Gdynia Maritime School
- Maritime School in Darlowo
- Maritime School in Kołobrzeg
- Maritime School in Gdańsk



Polish Maritime Education and Science

STUDENTS OF MARITIME ACADEMIES BY PROFILES

WYSZCZEGÓLNIENIE		Ogółem <i>Total</i>	W tym kobiety <i>Of which women</i>	Z liczby ogółem studia <i>Of which studies</i>		SPECIFICATION
				stacjonarne <i>full-time</i>	niestacjo- narne <i>extramural</i>	
OGÓŁEM	2007/08	9921	3331	5172	4749	GRAND TOTAL
	2008/09	10103	3477	5044	5059	
	2009/10	9977	3759	5106	4871	
	2010/11	10402	3917	5602	4800	
	2011/12	10566	3789	6120	4446	
Na roku studiów	I	2622	637	1990	632	Year of study
	II	2005	596	1395	610	
	III	1475	483	977	498	
	IV	1256	353	774	482	
Po ostatnim roku studiów bez egzaminu dyplomowego		1151	520	289	862	After the last year of study without diploma examina- tion
Studia drugiego stopnia		2057	1200	695	1362	MA supplementary studies

Polish Maritime education and science, The Statistical Yearbook of Maritime Economy 2012



Polish Maritime Education and Science

OFFICER'S CERTIFICATES OF SEA-GOING VESSELS ISSUED BY MARITIME OFFICES

WYSZCZEGÓLNIENIE		Ogółem <i>Total</i>	Urząd Morski w Gdyni <i>Maritime Office in Gdynia</i>	Urząd Morski w Słupsku <i>Maritime Office in Słupsk</i>	Urząd Morski w Szczecinie <i>Maritime Office in Szczecin</i>	SPECIFICATION
OGÓŁEM	2008	3652	1956	339	1357	TOTAL
	2009	3897	1971	348	1578	
	2010	6289	3364	382	2543	
	2011	6162	3584	388	2190	

Polish Maritime education and science, The Statistical Yearbook of Maritime Economy 2012



POLISH MARITIME CLUSTER

- **Board of Managers**

- **Chairman of the Board**

- Marek Grzybowski, prof. Gdynia Maritime University

- **Members of the Board**

- Ryszard Toczek – Municipality of Gdynia
- Alfred Naskręt kpt.ż.w. - Gdynia Maritime School

Address

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 - 81-225 Gdynia





Thank you



Marek Grzybowski Prof. Gdynia Maritime University

