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## National maritime associations in the world – a study of three case countries

Electronic Publications of Pan-European Institute 2/2014

# **National maritime associations in the world – a study of three case countries**

*Minghui Gao*<sup>1</sup>

**2/2014**

**Electronic Publications of Pan-European Institute**

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## 1 Introduction

Since the world has recognized the significance of marine industry, many countries have been investing huge on the development of this sector. From shipbuilding industry to shipping and ports, governmental decisions and private companies both contribute significant influence to the sector. Situations vary in different regions – for instance, in the countries such as Denmark and Norway where maritime sector exists as a traditional industry, the private giants take over the majority of the domestic marine industry, and in some other countries – for example, China – the central government takes the lead instead.

Besides the drive force that comes from the government and enterprise level, civil organizations – which are often named as maritime associations – that aim to promote the development of maritime sector have been formed after years of industrial cooperation, and nowadays start to play an important role for such development in many different countries. Many previous researches have focused on the maritime sectors in different countries in the world. However, few have particularly looked at the activities and role of civil maritime associations which may have provided special support and contribution to the development of the maritime sector. For this reason, this paper briefly studies three cases of such organizations in different countries in the world.

This paper is an extended study based on the third SmartComp research report on maritime sector developments in the global markets. The SmartComp research report has analyzed the competitiveness of maritime clusters in many different countries and regions in the world. As an extended step, this paper takes three countries that have been studied in the research report: China, Singapore and Finland. They represent three different types of maritime sectors: a rapidly developing maritime power, a traditional maritime country that has important role in the international market, and a traditional shipbuilding expert from the Central Baltic Sea Region. From each country, one of its most representative and influential associations is taken as an example.

Maritime associations in this paper refer to national non-profit organizations that aim to promote the general interests of the industry in certain countries. They differ from associations such as “IMO” (International Maritime Organization) that emphasizes on international policy development concerning maritime security and environmental protection (IMO, 2013).

## **2 Maritime associations in the case countries**

### ***2.1. In China – CANSI (China Association of the National Shipbuilding Industry)***

The rapid development and expanding of the marine industry in China has begun two decades ago (CMSI 2013), and the shipbuilding industry has soon become the fastest developing sector among other marine industries in China. By 2010, China had gained nearly 44% of the global ship market surpassing other major competitors, and has been ranked as the largest shipbuilding country in terms of order book volumes since then (Mickeviciene 2011; Yang & Zhu 2011; China Daily 2012; China Economic Net 2013). During this process, the China Association of the National Shipbuilding Industry (hereafter as CANSI) was then established in 1995 (CANSI 2013).

The association is a national non-profit organization of the shipbuilding industry which is under the supervision of the Commission of Science, Technology and Industry for National Defense of the People's Republic of China, and guided by the China Industrial Economic United Council (CANSI, 2013). CANSI consists of shipbuilding and ship repairing companies, marine equipment manufacturers, R&D institutes and related educational institutes (OECD-WP6, 2008: 17; CANSI 2013). Currently it has more than 530 members which are mainly medium-to-large-sized maritime enterprises in China, and the shipbuilding output of these enterprises accounts for 90% of the national output (ibid.).

CANSI is directed by its national members' representative assembly which elects the Board of Directors and Standing Board of Directors, and the secretariat under the assembly is in charge of CANSI's daily businesses (CANSI 2013). For the convenience of administration, CANSI organizes 16 regional liaison offices in different regions in China; moreover, in order to launch professional activities, the association also manages 10 specialization branches such as Boat & yacht, Ship repairing, Marine diesel engine, Deck machinery, Cabin mechanism, Marine automatic, Anchor chain, Foundry & forge, Welding, and Material & equipment branch (CANSI, 2013; Association & Brand, 2014).

According to CANSI, its responsibility is "to build a bridge that links the government and enterprises, to serve the shipbuilding industry, the government and the society, as well as to secure the legal rights of members and the industry" (CANSI 2013; OECD-WP6,

2008: 17). It mainly provides services, coordination, consultation and supervision to its members. In detail, the main tasks of CANSI are at below:

- Entrusted by the government, CANSI organizes industrial investigation, industrial developing plan, gives the government suggestions of economic and technical policies and regulations, as well as assists the Commission of Science, Technology and Industry for National Defense of the People's Republic of China to carry out administration of the shipbuilding industry (CANSI 2013; Association & Brand, 2014).
- CANSI reports common problems in the industry to the government, reflects the members' willing, and maintains legal benefits of their members (Shipol 2014; China Economics 2014).
- CANSI makes industrial regulations, coordinates between members and provides consultation to members (Shipol 2014).
- CANSI performs reform on enterprises, technologies and industrial development, and organizes training on human resources, technologies, career, management, regulations, and so on (CANSI 2013; Shipol 2014).
- The association organizes and participate the evaluation of products and various industrial projects (CANSI 2013).
- The association takes parts in the verification and certification of industrial career skill, quality approval and qualification (CANSI 2013).
- CANSI takes parts in making and modifying national and industrial standards, and it is also responsible on implementing these standards and provides supervision on its members' implementation of the standards (CANSI 2013).
- The association organizes activities between members and foreign partners, which include visits, exhibitions, trade conferences, etc. (CANSI 2013). For instance, CANSI has generated a forum for members in 2010 (2010 forum 2014), and a three-party congress with shipbuilding associations of Japan and South Korea in 2012 (CSSC 2014).
- CANSI collects, analyzes and publishes economic information about international shipbuilding industry, edits and publishes association's magazines, data and other publications. These publications are "China Ship news" and "International Boat and Yacht" magazine, "China Shipbuilding Industry Information" journal, "Directory of China's Shipbuilding Industry Enterprises" and "Annual Statistics of China Shipbuilding Industry" (CANSI, 2013; China Daily, 2014). At the same time, the association undertakes other tasks from the government and enterprises (Shipol, 2014).

To summarize, as CANSI offers information to its members, mediates between the government and domestic shipbuilders, promotes its members to foreign partners, as well as generates business opportunities for the members, the association is playing a role as a linkage between its members, the government and foreign partners in the shipbuilding industry.

## **2.2. In Singapore – ASMI (Association of Singapore Marine Industries)**

Due to its special location by the ocean, Singapore has a very long history of utilizing the sea and developing its marine industry. The Singapore marine and offshore engineering industry is a world-class industry with an international clientele (ASMI, 2013).

In 1968, the Association of Singapore Marine Industries (hereafter as ASMI) was founded (ASMI, 2013). As a non-profit trade association, ASMI aims to promote the interests of the marine industry in Singapore, foster co-operation among them and organize regular programs to address common issues (ASMI 2013; Spring Singapore 2014).

ASMI represents “a wide cross-section” of ship repair, shipbuilding and rig building industry in Singapore; therefore, its members include major ship repair yards, rig builders and shipbuilders in Singapore, as well as most of the established local and foreign manufacturers and suppliers of marine and offshore components, and major marine and offshore engineering companies (ASMI, 2013). It also “represents marine and offshore engineering contractors and companies whose activities are directly related to the industry including classification societies and marine consultants” (ibid.)

As ASMI represents the majority of players in the marine industry, it promotes the industry locally and also internationally. In Singapore, ASMI provides the Singapore marine industry a platform to share mutual concerns on manpower, safety, training and image enhancement (ASMI, 2013; Spring Singapore 2014). By promoting new methods, technology, and practice systems, ASMI concentrates on improving industrial productivity and increase labor efficiency (Spring Singapore 2014). With ASMI's support, its more than 200 members utilize this platform to discuss common issues that “allow the industry to go forward” (ASMI, 2013).

Moreover, by boosting the image of marine sector and professionals who work in this field, ASMI aims to attract more skilled labor to the industry (Spring Singapore 2014).



Since 2007, in cooperation with other organizations in Singapore, ASMI has been sponsoring the production of “The Peak”, a TV series that shows the vibrancy and multidimensional nature of Singapore’s marine industry (EDB, 2013).

At the international level, ASMI provides more opportunities to the members in terms of marketing and cooperation with foreign partners. For instance, in partnership with Marshall Cavendish Business Information Pte Ltd, ASMI publishes the annual Singapore Ship Repairing, Shipbuilding & Offshore Industries Directory which provides a comprehensive contact foundation among the relevant actors in the sector (SmartComp 3<sup>rd</sup> research report, 2013). Furthermore, ASMI organizes seminars for its members in order to help them on establishing overseas networks (Spring Singapore 2014).

To summarize, ASMI works as a platform where members can share information and discuss mutual concerns, an accelerator to improve productivity and efficiency of the marine industry of Singapore, and an agency that promotes the image of Singapore marine sector to both the potential human resources and the rest of the world. In the past forty years, the association is believed to “provide the necessary springboard for many joint efforts and initiatives in the marine industry” in Singapore (ASMI, 2013).

### **2.3. In Finland – FMI (*The Finnish Marine Industries*)**

Located by the Baltic Sea, Finland has a long history of seaborne industry. The Finnish maritime clusters nowadays consist of 2000-3000 companies (SmartComp 1<sup>st</sup> research report, 2012). In order to contribute to the general development of the marine industry in Finland, there are several interest groups and associations operating within the territory, and the Finnish Marine Industries is the most well-known among these associations.

As a branch association of the Federation of Finnish Technology Industries which aims to assist the Finnish technology industry to become successful in the global marketplace (The Federation of Finnish Technology Industries 2014), the Finnish Marine Industries (hereafter as FMI) serves the same purpose concerning its own members. These members come from different sectors in the marine industries: leading shipbuilding and ship repair yards, marine equipment manufacturers, turn-key suppliers, ship designers and Finnish companies in off-shore industry (The Finnish Marine Industries 2014).

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FMI holds various activities for its 60 members, and presently the most important activities include the promotion of sectorial networking, the coordination of product R&D and the application of EU shipbuilding policy in Finland (The Federation of Finnish Technology Industries 2014). At the same time, the association is also representing the entire Finnish marine technology sector in international associations, such as in the European Ships and Maritime Equipment Association (SEA Europe) (ibid.).

For the purpose of promoting networking within the industries, the association has set up different working groups within the organization, and each working group targets a specific goal. These groups are networking developing group, research committee, communication and education group, updating training group and international cooperation group (ibid.). Through these groups, FMI is able to gather information and suggestions among members, and then initiate working projects and programs accordingly. Examples are the seminar series of “Future Reception” that deal with the current research projects and the vision of the organization (The Federation of Finnish Technology Industries 2014). Furthermore, the cooperation FMI coordinates is not limited within the Finnish territory. For instance, together with the Federation of Finnish technology Industries and Finpro, a 3-year project has been launched in order to make direct contacts with decision makers in the Russian marine industry and potential partners in the northwest Russia (Finpro 2014).

To summarize, FMI works actively on promoting and improving the networking within the marine sector in Finland, and it contributes significantly on the coordination of research and development in terms of initiating research projects and programs.

By doing so, the association does not only connect domestic members with foreign partners, but also opens new gates for the cooperation between industrial players and research institutes.

### 3 Conclusion

#### 3.1. Comparison between the associations

In the previous paragraphs, three maritime associations have been studied: the China Association of the National Shipbuilding Industry (CANSI), the Association of Singapore Marine Industries (ASMI), and the Finnish Maritime Industries (FMI). While these associations share similarities, they vary from each other in terms of activities and roles (see table 1 at below), as well as media influence.

**Table 1. Different activities and roles of associations**

Association	Members		Purposes & role
	Amount	Who are they	
CANSI	More than 530	Medium-to-large-sized maritime enterprises in China:  Shipbuilding & ship repairing companies, marine equipment manufacturers, R&D institutes and related educational institutes	A bridge between the government and maritime enterprise;  Government's assistant organization
ASMI	More than 200	Maritime enterprises in Singapore:  Major ship repair yards, rig builders & shipbuilders, local & foreign manufacturers and suppliers of marine and offshore components, and major marine and offshore engineering companies	Promotes the industry locally & internationally;  Enhances cooperation among its members
FMI	About 60	leading shipbuilding and ship repair yards, marine equipment manufacturers, turn-key suppliers, ship designers and Finnish companies in off-shore industry	Promotes sectorial networking;  Coordinates product R&D and the application of EU shipbuilding policy in Finland;  Represents the entire Finnish marine technology sector in international associations

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According to CANSI's activities, the association acts as an official assistant of the government. As it provides connection between the authority and most of the major shipbuilders in China, CANSI plays an extremely important role on the communication between the shipbuilders and the government. On the one hand, it assists the government on "pushing" the implementation of regulations and supervision, and on the other hand, it brings the problems and willing of shipbuilders to the upper authority. Meanwhile, CANSI also acts as a platform where members can find industrial information about economics, technologies, training and other topics; furthermore, cooperation between domestic shipbuilders and international shipbuilding players can be accelerated through CANSI. The association itself seems like an authority to many Chinese shipbuilders.

In Singapore, ASMI's role seems to have more autonomy and it is quite different from its Chinese counterpart. The association concentrates more on the promotion of the industry and human resources. Its goal caters the needs of the Singapore government on promoting the image and attractiveness of the maritime sector. Therefore, ASMI is believed to be quite influential within Singapore in terms of visibility and popularity; it exists and works in a very vivid and active way to achieve its goal.

Comparing with the previous two associations, FMI seems to have a rather compact and neat organizational structure. Within the five different sub-working groups issues regarding the members are dealt with separately in terms of networking, R&D, communication and education, training and international cooperation. The systematic channels are believed to accelerate the information flow within the association and address the problems quite precisely.

To briefly summarize, each of the three associations has its own advantages: CANSI has authority from the Chinese government and access to national organizations, ASMI has good connection to international stakeholders and positive image, and FMI has effective working process, extensive network within Europe and good understandings of EU policies and regulations.

Moreover, the three associations act quite differently in terms of media influence. The media influence here is measured by the range of press publication that is related to the associations, as well as the promotion the associations makes for its own exposure in the media. In addition, participating or organizing international events could provide

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the associations opportunities to promote themselves and introduce their members to the world.

For CANSI, its name appears in the news when new contracts have been signed between the association and its partners (CSSC 2014). The association doesn't make much promotion for itself, and the only publication it publishes is the industrial yearbook. However, the members of CANSI can get free copies of "SinoShip Magazine", a bilingual (English and Chinese) magazine that targets Chinese and foreign shipbuilders, ship owners, and marine suppliers, etc. who operate in China as readers (SinoShip Magazine 2014). The magazine focuses on Chinese shipping, shipbuilding and offshore industry, and its publishing network covers all shipping centers in Asia such as Singapore, Hong Kong, South Korea and Japan (SinoShip Magazine 2014). The bilingual contents are believed to be helpful on reaching more readers in the marine sector. CANSI has also been organizing international maritime conference and trade show "Marintec China", which is the largest maritime exhibition in Asia (Marintec China 2013).

ASMI, on the other hand, works even more actively on promoting itself in the media than its counterpart in China. Besides the TV program "The Peak" it sponsors as mentioned earlier, the association also publishes its own newsletter "ASMI News" which is targeted to international readers (ASMI 2013). The newsletter provides reports and statistics on the industry, discusses major issues of the industry, policies and new deliveries; meanwhile, news of events and training courses can also be found in the newsletter (ASMI 2013). In addition to the publications, ASMI has been participating joint events actively for years, for example, on the annual "Asia Pacific Maritime" exhibition. The exhibition provides industrial players a platform to obtain the latest news and trends in the marine sector, establish network and explore business opportunities (Asia Pacific Maritime 2014). At the event, ASMI works as a supporting partner together with international partners which are marine associations from all over the world (Asia Pacific Maritime 2014).

In Europe, as FMI coordinates cooperation frequently, its name has often been addressed in the news; however, the association itself doesn't seem to have its own promotion or publication in the media.

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### **3.2. Cooperation in the future**

Each of the three associations, regardless of their location, plays an important role in its country on uniting its members to bring common benefits. As the members of the associations are mostly large and influential companies, the well-being of the associations, at some degree, has an impact on the competitiveness of the local marine sector. Therefore, in order to enhance their own abilities to achieve the goal, the associations could improve their performance by learning from each other.

In general, CANSI has the most functioning connection or power of discourse to the government, and this may provide the association more access to resources; ASMI acts the most actively in the region and has developed special methods on promoting itself and the maritime industry; and FMI seems to work the most efficiently in terms of troubleshooting, and initiating projects and cooperation. At the same time, CANSI and FMI are not acting actively in the media as ASMI.

Concerning working efficiency, FMI seems to be a good model to follow, especially for CANSI that relies quite much on the government. Concerning collaboration between the industry and research institutes, FMI can also be a good sample. For CANSI, it seems to be lack of linkage between member companies and research institutes. For ASMI, bridges built between marine companies and research/educational institutes, besides TV programs, would attract even more skilled human resources to marine sector. Concerning media influence, FMI may want to be more active in promoting itself and its members like the other associations do.

Furthermore, as they all share the same goal of promoting the national marine sector, cooperation between the three associations would increase the competitiveness of themselves and the marine sector they represent instead of working separately. In terms of cooperation, the three may, for instance, start to share information at a certain degree. Information could be related but not limited to member companies, local and international policies, training programs and even potential projects.

The information sharing allows all member companies from the three associations to advertise their own expertise, even when they are located at distant places in the world. With better and wider access to updated information and trends, more opportunities on doing business and research could be generated. This is believed to benefit all the members of these associations, as the information would concern many

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major players of the marine industry in the Central Baltic Sea Region and Asia. In this case, marine sector in different countries may not be systems that operate separately, but mechanisms that interact in the future. By getting access to information sources and different expertise, resources could be utilized more efficiently and hence, increase the competitiveness of the marine sector in all three countries.

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