Interview Study - Maritime businesses in the Gothenburg Region, Orust and Uddevalla

The Gothenburg Region

29/05/2020

Contents

1. Introduction

At both a European level and a national and regional level in Sweden, maritime businesses have been identified to have great potential for contributing to value creation and employment. A European strategy for blue growth was adopted in 2012. This strategy presents our marine areas as important driving forces for the European economy and recognises that there is great unused potential for innovation and growth in the maritime businesses. [1] The European strategy identifies increased knowledge, maritime planning and joint and integrated maritime surveillance as important tools for making the most of the potential.

At a national level in Sweden, there is a maritime strategy for people, jobs and the environment which was produced in 2018. [2] This includes a vision of "a competitive, innovative and sustainable maritime industry that can contribute to increased employment, reduced environmental impact and an attractive living environment". The national strategy identifies key areas where measures are needed to be able to achieve visions such as "planning with a maritime perspective" and "functional rules and efficient permit processes".

At regional level in Västra Götaland, there is also a strategy and an action plan for maritime businesses (updated strategy 2015 and action plan 2016), the purpose of which is to encourage and develop a sustainable maritime industry with the objective of

[1] https://ec.europa.eu/maritimeaffairs/policy/blue_growth_en

[2] https://www.regeringen.se/contentassets/86a578f7a521469e9b6b8c62ac5aa128/maritim-strategi.pdf

creating more jobs and higher growth.[3] The vision is that "West Sweden shall be one of Europe's leading maritime regions with solutions aimed at innovation, as well as environmentally-adapted and sustainable development". Among other things the action plan concentrates on ocean governance, seafood and maritime tourism as priority areas and includes horizontal goals such as collaboration and development of maritime competence. Another goal in Region Västra Götaland's maritime strategy is that maritime tourism shall be more evident in the coastal municipalities' comprehensive and detailed development planning.

At local level within the regions, for example in northern Bohuslän and Uddevalla, maritime strategies have also been adopted with an ambition to create the conditions for the development of these businesses.

Thus, there is a strong will reflected in strategic documents at different levels, to make use of the potential of the maritime businesses and West Sweden is a proactive, strong region in the maritime sector. However, unlocking the potential that exists requires knowledge of the commercial maritime sector's needs and conditions for development, but also demands strict requirements for how this development occurs, since the marine ecosystem, along our Swedish west coast especially, is sensitive. Planning and governance of our coastal and marine areas are two of the important tools that need to consider these perspectives. Hopefully this interview study can contribute to an increased understanding of conditions for the commercial maritime perspective in our

[3] https://www.vgregion.se/regional-utveckling/program/hallbara-maritima-naringar/

area, so that in the longer term they can be increasingly considered in planning and governance for long-term and sustainable development.

2. Background

2012 saw the beginning of long-term work in the Gothenburg Region, Orust and Uddevalla to protect and develop the qualities of the coastal zone. Seminars and dialogue meetings were held that focused on joint discussions on the development of the coastal zone. This led to a preliminary study of inter-municipal coastal zone planning in 2014/15, which was financed by Region Västra Götaland. The aim of the preliminary study was to formulate proposals for how greater future collaboration in inter-municipal coastal planning could be developed, in terms of priority subject areas, organisation, finance, links to similar processes at other levels and interplay with the development of maritime industries. As part of and an important complement to the preliminary study, our partner Business Region Gothenburg (BRG) performed a review of the needs of maritime industries in the Gothenburg Region, Orust and Uddevalla.[4] BRG's report has been the basis for this interview study.

The preliminary study provided the basis for the implementation of a three-year, inter-municipal coastal zone project 2016-2019, with the aim of increasing collaboration between municipalities and other actors to achieve sustainable development of the coastal and marine area. As part of the project, a deepened structural illustration was developed for the coastal zone with joint agreements on how the coastal zone shall be

[4] Business Region Gothenburg 2014. Review of the needs of maritime industry - Link (Swedish)

developed and protected, from Uddevalla in the north to Kungsbacka in the south. [5] One of the six joint agreements is in fact about sustainable maritime businesses.

The structural illustration and its joint agreements act as guidance and support for physical planning in the municipalities and present a holistic view of building, transport and blue and green infrastructure. A number of other relevant planning material within different focus areashas also been developed as part of the project and gathered together into a map platform.

As part of the continuation of the inter-municipal coastal zone work, the Gothenburg Region is participating in the EU Interreg project Land Sea Act (Land-Sea-Act Land-sea interactions advancing Blue Growth in Baltic Sea coastal areas).[6] The overall aim of the project is to reinforce the development of sustainable blue growth in the coastal communities of the Baltic region through collaboration with and between local communities and various administrative levels. The EU project is also well grounded in the joint agreements in the detailed structural illustration, with the opportunity to focus on the maritime industries of our coastal area.

The Gothenburg Region's part of the project, which is co-financed by the Swedish Agency for Marine and Water Management, is to develop the basis for a sub-regional maritime business strategy to elaboratethe conditions for integrating a maritime business perspective in coastal and maritime planning. This interview study represents part of this basis.

[5] The coastal zone - the region's joint responsibility. https://goteborgsregionen.se/kustzonen

[6] https://land-sea.eu/

1.2. Purpose

The purpose of the interview study is to examine the needs of maritime industry, focusing on competence, collaboration, land and premises, as well as the needs of and challenges for companies, so as to increase knowledge and opportunities to create good conditions for their development. The study represents part of the basis for a sub-regional maritime business strategy within the framework of the EU Interreg project Land-Sea-Act (see previous section).

3. Implementation

The interview study is based on BRG's review of the needs of maritime business in 2014, see the section *Background*, above. In many ways, the interview study follows the same implementation as the 2014 report, but with emphasis on questions that are relevant for the Gothenburg Region's work, such as land needs and collaboration issues.

3.1 Method

With the aid of the Institute for Quality Indicators (Indicator), we have conducted telephone interviews with companies within the maritime businesses. Most of the interviews were conducted in January-February 2020. A total of 130 companies participated.

A questionnaire of about 20 questions was prepared with both open and closed response alternatives; see Appendix 1. We have used the same questions as in BRG's 2014 survey to a great extent, to enable comparisons. There are questions about the companies' most important markets, competence needs and how the companies handle collaboration. There are also questions on how dependent the companies are on their geographical location, as well as how they see the future and what opportunities and challenges they envisage for their companies. As mentioned, the interviews with companies were conducted in January and early February, before the most severe effects of the corona pandemic reached Sweden. The responses and results from the interviews do not therefore reflect the situation we have now (May 2020) with a widespread corona pandemic that has greatly impacted on companies and the economy.

SNI (Swedish Standard Industrial Classification) codes were used to prepare selection lists of companies[7]. We use the same codes as those that were identified as maritime in BRG's earlier survey. BRG took as its basis the report "The Swedish Maritime businesses 2007-11"[8] which it supplemented with additional companies after contact with business organisations. With the aid of the SNI codes, we arrived at a list of 2,052 companies in the above-named municipalities. There was a total of 22 different SNI codes among the companies.

It was primarily small companies that were interviewed. Generally speaking, these companies are more difficult to capture in other statistics and at the same time there is a great representation of these in the maritime sector. Small and medium sized companies are also an important target group for work in the maritime cluster in Västra Götaland.

One of the difficulties of using SNI codes is that not all companies are registered under the right code. For example, some companies may be registered under code 70100, Activities performed by a head office, but have their main activities in maritime industries. Another difficulty is that some areas do not have a clear SNI code. In "Leisure and tourism", maritime visitor industries cannot be distinguished from general ones, which means that it has been difficult to capture this group and it is difficult to arrive at

[7] Find out more at http://www.scb.se

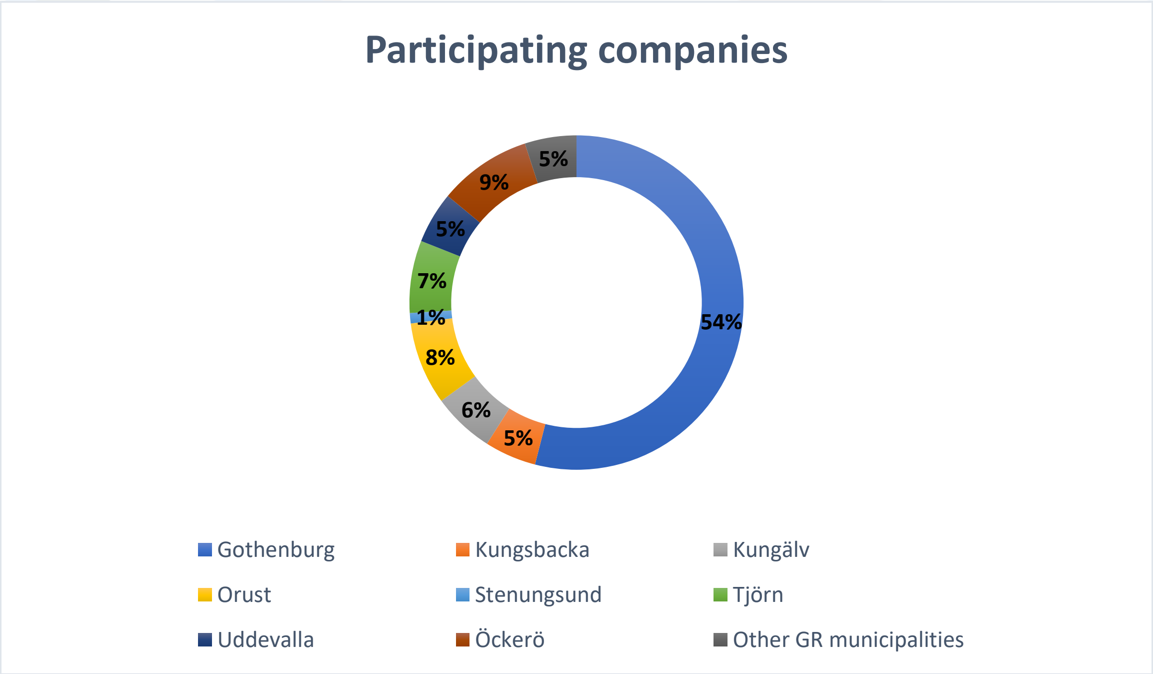
[8] https://www.vinnova.se/en/publikationer/den-svenska-maritima-naringen/

assessments from the results. Also, there is no exact definition of what the term leisure and tourism includes and the area is fragmented.

3.2 Participating companies

Companies in the municipalities of Gothenburg, Kungsbacka, Kungälv, Orust, Stenungsund, Tjörn, Uddevalla and Öckerö participated in the interview study. Maritime industries are not only found in coastal municipalities, so a selection of companies was also made in the municipalities of Ale, Härryda, Lilla Edet and Partille. These municipalities are represented under "other" municipalities in the diagram below. The selection is based on companies that responded in the 2014 survey.

Figure 1 Participating companies



In the interview study, 27 percent of the participating companies have 0 employees, 40 percent have 1-4 employees, 10 percent 5-9 employees, 15 percent 10-19 employees and 10 percent more than 20 employees.

The respondents in the study were owners, managing directors or other members of company management. 25 percent of the participating companies were part of a group.

3.3 Division into sectors

Maritime industries comprise a wide range of businesses that in many cases have different conditions. The presentation of results in the study is done as a whole, but in some cases divided into sectors.

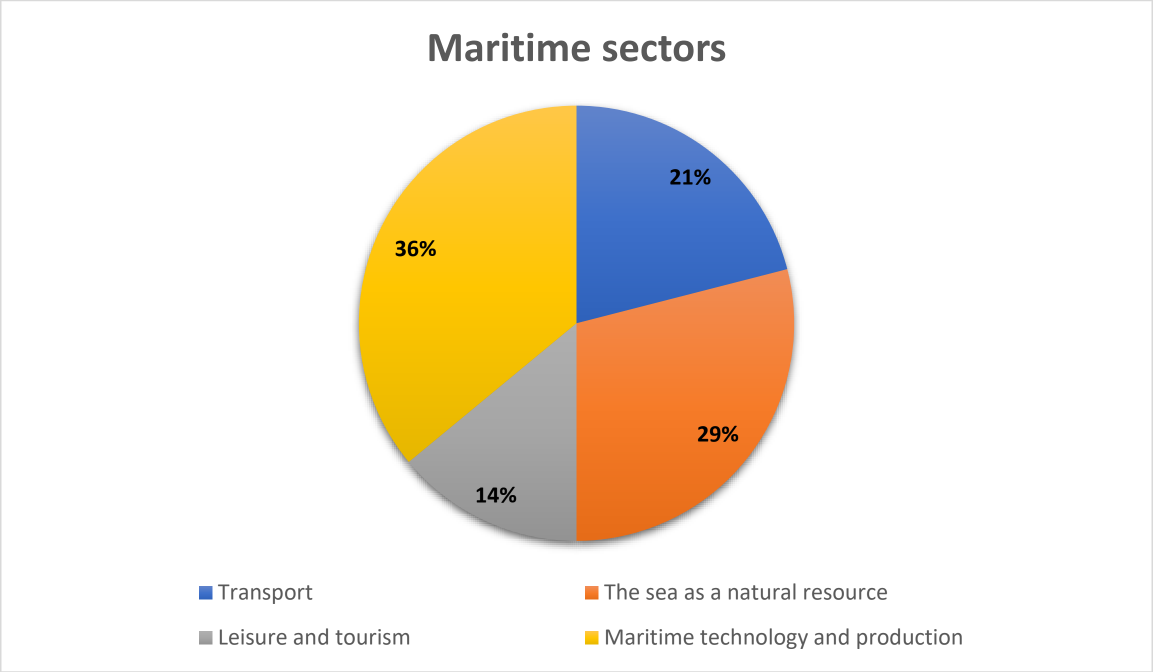
BRG's 2014 survey used a division into sectors in the analyses that was based on Region Västra Götaland's maritime cluster subdivision and reported results for maritime operations, seafood, marine energy and maritime tourism.

The national maritime strategy uses a slightly different division into maritime sectors, as follows: Transport (shipping companies, harbour and logistics companies), maritime technology and production (technology and system suppliers, subcontractors, shipyards and the leisure boat industry), the sea as a natural resource (marine foodstuffs, energy from waves, wind and water, seabed extraction of biofuel, minerals etc.), leisure and tourism (ferry traffic, cruising, archipelago tourism, angling, trade in leisure craft and marinas) and service (e.g. ship brokers, insurance companies, commercial hydrographic surveys). [9]

We have chosen to use the sector division used in the national maritime strategy for those parts of the study analyses that are divided into sectors. This is partly because the national maritime strategy has a follow-up model in which Statistics Sweden uses this subdivision to collect data and statistics about the companies and partly because, like this interview study, this subdivision uses the companies' SNI codes. This increases the opportunities for making comparisons with the annual follow up that will be performed by the maritime strategy at national level. The companies interviewed in this study are divided as in the diagram below.

[9] A Swedish maritime strategy – for people, jobs and the environment. https://www.regeringen.se/regeringens-politik/maritim-strategi/

Figure 2 Maritime sectors



As part of the Land-Sea-Act project, statistics have also been obtained from Statistics Sweden of maritime companies according to the EU strategy sector subdivision and definition, as well as Eurostat's geographical subdivision into what are known as the NUTS areas.[10] The total number of jobs in 2017 in the area (SE23 Halland and Västra Götaland) according to these statistics was approximately 59 000.

An analysis of the statistics performed by project partner Hamburg Institute of International Economics (HWWI) for the NUTS area West Sweden (SE23 Halland and Västra Götaland) shows that jobs in the maritime industry in West Sweden are distributed as follows (Figure 3). Thus, coastal tourism is the dominant sector, accounting for almost

[10] Eurostat https://ec.europa.eu/eurostat/web/nuts/background

80 percent of jobs. As mentioned above, it is difficult to give an exact definition of coastal or marine tourism and different actors measure and report this in different ways. However, these statistics give an indication that companies in leisure and tourism are somewhat under-represented in this interview study.

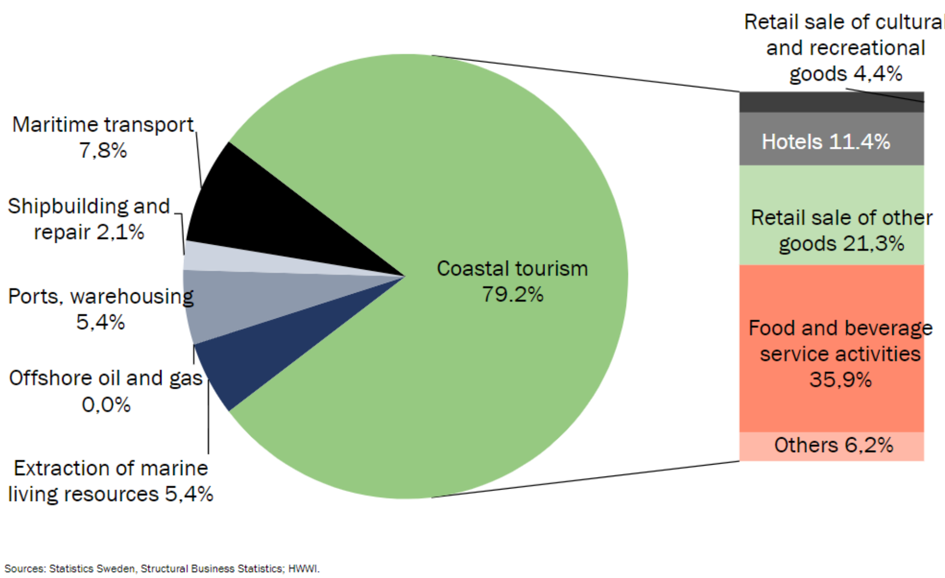


Figure 3 Sector distribution of jobs in maritime industries in the NUTS area West Sweden (SE23). Sector subdivision according to Eurostat.

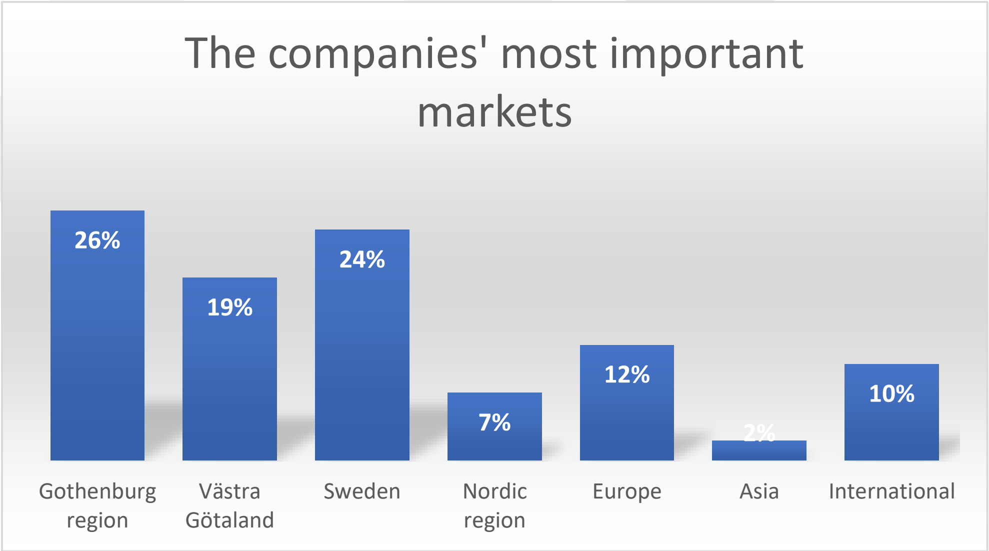
4. Results of the interview study

This section presents the respondents' responses to the interview questions.

4.1 The companies' most important markets

One of the first questions in the interviews was which geographical market is most important for the company. The responses show that the local and regional markets have great significance and represent the most important market for 45 percent of respondents. For 69 percent of the companies, Sweden - locally, regionally or nationally - is the most important market, while for 31 percent it is the markets outside Sweden's borders that are most important.

Figure 4 The companies' most important



Compared with BRG's 2014 survey, in 2020 somewhat more companies have stated markets outside Sweden as the most important; the difference between this year's result and the previous survey is 6 percent.

This result does not appear to be unique to either the maritime industry or the Gothenburg region. According to the Swedish Agency for Economic and Regional Growth's survey *Companies' conditions and reality 2017,* in which 10,000 small and medium-sized companies participated, as many as two thirds of small companies mainly aim at the local or regional markets. The national market is stated as being the main market of about one in five small companies and only 12 percent state that they mainly produce for an international market. The survey also shows that the larger the company is, the more likely it is to be active nationally and internationally. Almost one in four of the medium-sized companies state that their main market is outside Sweden. The corresponding figure for small companies is just under 10 percent. [11]

4.2 The development and supply of competence

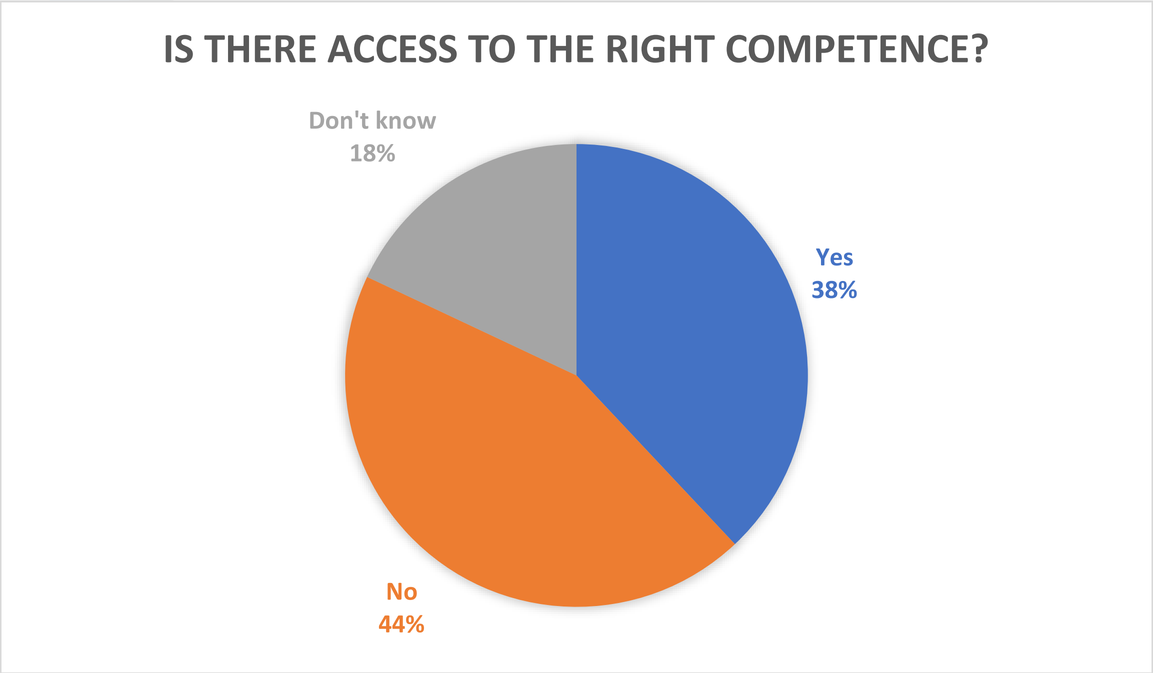
The companies were asked to what extent they work to attract, develop and keep the right employees. The companies were able to mark their answers from 1 to 5, where 1 represented nothing at all and 5 corresponded to full focus.

[11] Swedish Agency for Economic and Regional Growth 2017 - Companies' conditions and reality 2017. https://tillvaxtverket.se/download/18.6c7cba4d15e847bac579ed56/1506430418387/F%C3%B6retagens villkor och verklighet.pdf

61 percent of the companies said that they had partial or full focus on this issue. 27 percent of the companies in the study had no employees.

When asked whether the company had access to the right competence on the market, 38 percent of the companies said that there was access. This was a reduction from the 2014 survey in which a majority of companies (66 percent) said that there was access to the right competence.

Figure 5 Competence on the market



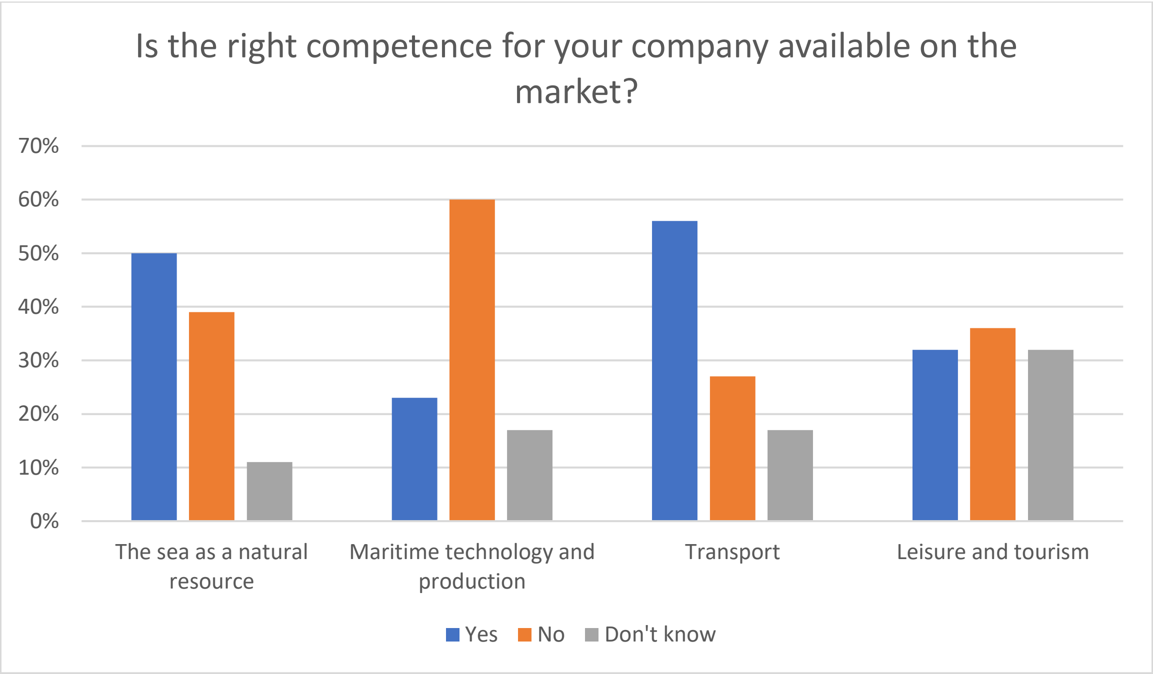
There were differences in how smaller and larger companies (by number of employees) answered. 57 percent of companies with fewer than 20 employees answered that there was a shortage of the right competence, compared with 33 percent of companies with 20 or more employees. The report from 2014 shows the opposite result, that companies with more than 20 employees were more likely to state that there is a lack of available competence and that this could be a threat to future business.

The Swedish Agency for Economic and Regional Growth's 2017 study of companies' conditions and reality confirms this picture and shows that insufficient access to an appropriate workforce was seen as the greatest obstacle to growth by small and medium-size companies.[12]

It is not possible within the scope of the interview study to analyse companies' competence needs with their capacity to actually employ. However, a comparison between competence needs and the companies' expected development over the next three years (profitability and sales) shows no significant differences between companies with access to the right competence and those who have difficulty in finding the right workforce. Comparison between how companies from different maritime sectors have answered shows that the lack of competence is paramount for companies in maritime technology and production, followed by the sector the sea as a natural resource.

[12] Swedish Agency for Economic and Regional Growth 2017 - Companies' conditions and reality 2017.

Figure 6 Competence on the market by maritime sector



Responses to the question of what competence the company lacks show that there is a demand for experienced personnel or persons with the right qualifications/formal education in a number of sectors, which leads to the company having to put resources into training itself. Responses also show that it is difficult to find people who are interested in the industry, especially among the young.

> "It is difficult to get personnel with the right training. There is a need for training in boat building, shipbuilding engineers, boatbuilders who can use plastics. It's a total crisis."
> (Company in maritime technology and production)

Companies in the different sectors state that there is a lack of:

The sea as a natural resource:
Skippers and ship's officers
People who can fillet and smoke fish
Technical competence

Maritime technology and production
Needlework
Cover makers
Mechanics
General craftsmen
Divers
Boatbuilders

Transport
Compass adjusters
Education in shipping
Specialist competence in seafaring

Leisure and tourism
Cheap workforce
Experienced personnel
Skippers, seamen and ship's officers

Interviews in the 2014 survey indicate that several sectors require specialist knowledge, and this means that the availability of people with the right competence is diminishing. Companies in the offshore industry believes that difficulties in finding the right competence is not only a problem in Sweden, but that there is a shortage in many parts of the world. Some businesses need special permits to be able to perform certain work. Combined with the clear seasonality, this makes it difficult to find competent and qualified personnel.

4.3 Local collaboration

74 percent of companies say that they collaborate locally with other companies, municipalities and/or educational bodies. In 2014, it was 66 percent of companies.

If we compare companies in different municipalities, there are some variations. In most municipalities, the average for local collaboration is 70 to 80 percent. Uddevalla and Orust stand out with 90 and in Öckerö 100 percent of companies collaborate locally.

The majority of companies say that they collaborate with other companies in the locality (77 percent). The companies also say that they collaborate with various schools, colleges and universities and that they have some contact with the authorities. Some companies say that they work with the municipality on development and permit matters.

Of the companies that currently do not collaborate locally, 70 percent are interested in finding partners to collaborate with. Several mention that they would like more collaboration with the municipality.

> "(We collaborate) with the municipality on development and permit matters, with other companies where we register/are registered access to boat moorings. Collaboration with the municipality could be better - we have a marina that is not fully occupied, the municipality has a queue but they can't transfer people over to us." (Company in maritime technology and production)
>
> "We don't get support from the municipality and the region - more discussion is needed about boat moorings, infrastructure for rapid charging of electric boats (for example)." (Company in leisure and tourism)

4.4 Other meeting places and networks

To find out more about what contacts the companies have, we asked whether they participate in meeting places and networks with various actors and if they could give examples of what fora they are part of.

Figure 7 The companies' meeting places and networks

Companies that participate in meeting places/networks with…	
Politicians	26%
Public actors and authorities	27%
Companies in the same industry	71%
Companies in a different industry	25%
Researchers in academia and/or institutions	37%

Politicians

The companies meet politicians in a number of fora: company associations, island councils, the Ministry of Enterprise, the West Sweden Chamber of Commerce, Almedalen, Lighterarena, Sweship, West Sweden Tourism Council, the Monitoring Committee and at company breakfasts. When companies meet local politicians, they often discuss permit questions, research and development, the provision of competence, land need and logistics and infrastructure issues.

Public actors and authorities

The companies meet public actors and authorities through the West Sweden Chamber of Commerce and various business organisations. 68 percent of the companies state that they have other contacts with the authorities in permit questions, for example. Examples of public actors and authorities that the companies meet include the Swedish Energy Agency, the Swedish Agency for Marine and Water Management, the Public Health Agency of Sweden, the County Administrative Board, the National Food Administration, the Swedish Maritime Administration, the Swedish Transport Agency, Swedish Customs, the municipality (environmental management, planning and building), the Swedish Transport Administration, the Swedish Migration Agency, the Swedish Board of Agriculture and the Swedish Tax Agency.

Companies in the same and other industries

The companies mentioned a number of different business networks and business organisations for exchanges with other companies.

Researchers in academia and/or institutions

The companies meet researchers from several different universities and institutions through meeting places and networks. Among others, the companies mentioned Chalmers, Halmstad University, Borås University, the Technical University of Denmark, the

University of Gothenburg, the Swedish environmental institute IVL and RISE Research Institutes of Sweden AB.

Are there any meeting places or networks that you miss?

Several companies stated that at present they do not have meeting places with politicians and public actors/authorities to discuss a number of different issues:

- Climate adaptation
- rental of and access to quays and jetties
- To market outdoor activities and boating
- Hydraulic engineering issues and rules
- Infrastructure issue
- Help with finding where and how funding can be applied for
- Help and advice on complying with requirements smoothly
- Societal development and energy development

4.5 The significance of location

In the interviews, companies had the opportunity to comment on the importance of their geographical location through a number of questions on seasonal dependency, location dependency, customers and offerings.

Seasonal dependency

69 percent of the companies answered that their activities are completely or partly dependent on seasons. In 2014, this was 60 percent.

In terms of municipalities, it was mainly companies in Kungälv, Orust and Tjörn that answered that their activities were season-dependent. If we look at sectors, it was mainly companies in the sea as a natural resource, maritime technology and production and leisure and tourism that stated that their activities are season-dependent (70-80 percent answered yes/partly). In transport, 50 percent answered yes/partly.

Location dependency

63 percent of the companies answered that their activities are completely or partly dependent on location.

In terms of municipalities, it was companies in Kungälv (100 percent), Orust (80 percent), Gothenburg (73 percent) and Kungsbacka (71 percent) that stated that their activities are location dependent. By sector, it was mainly companies in the sea as a natural resource and maritime technology and production that considered themselves to be location dependent (about 70 percent answered yes/partly).

Customers

34 percent of the companies answered that more than 50 percent of their customers are local. 80 percent of the companies that said that their customers are local also stated that they were location dependent. The more location dependent a company says it is, the greater the proportion of permanent residents they have as customers. Results from the 2014 survey demonstrate the same patterns.

What the location offers

60 percent of the companies answered that they are entirely or partly dependent on the local offering of commercial services for their activities. In terms of municipalities, this applied primarily to Tjörn, but also to Öckerö and Uddevalla, followed by Kungälv and Gothenburg.

The answers vary when they are divided by maritime sector. For leisure and tourism and the sea as a natural resource, the figure is about 70 percent, while 50 percent of companies in transport and maritime technology and production are dependent on local services.

Is there anything you miss locally?

The companies were asked if there was anything in the locality that they missed that could have helped the business to grow and develop. The commonest responses were:

- Larger port
- More quays and jetties
- More boat moorings
- More boatyards
- Services and activities (including restaurants and shops)
- Better and cheaper public transport (to the mainland, to Gothenburg)
- Support from/contact with the municipality
- Workforce/competence

4.6 Land and premises

To find out about the companies' need for land and premises, they were asked whether they had a need for land to move their business to or expand. 5 percent of the companies said that they needed land to move the business to and 25 percent that they needed land to expand the business. Most of the companies that need land for expansion are in Gothenburg and Kungälv, but also in Kungsbacka, Orust, Tjörn, Uddevalla and Öckerö. Many of these companies pointed out a need for land close to the sea or directly adjacent to water. This may be for developing ports and boat moorings, but also for boatyards and industrial land close to the sea. Access to land is seen as a precondition for being able to develop their businesses over the coming years. 19 percent of the companies that needed land were willing to consider moving to another location to obtain this.

37 percent of the companies said that they would need larger premises in the next few years. Compared with the results of the 2014 survey, the need for land for expansion and the need for larger premises have increased.

Figure 8 The companies' need for land

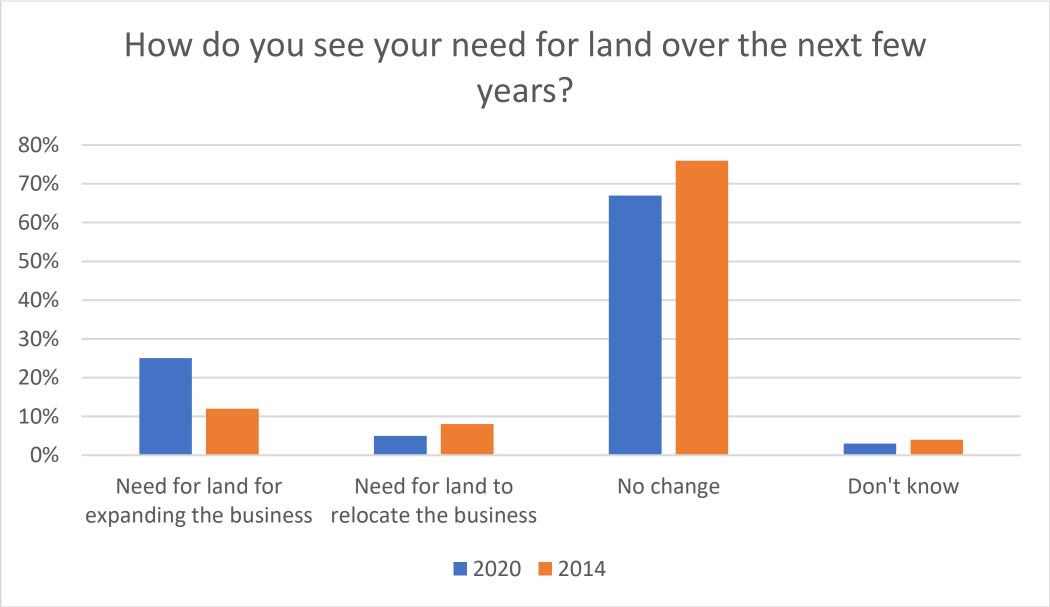
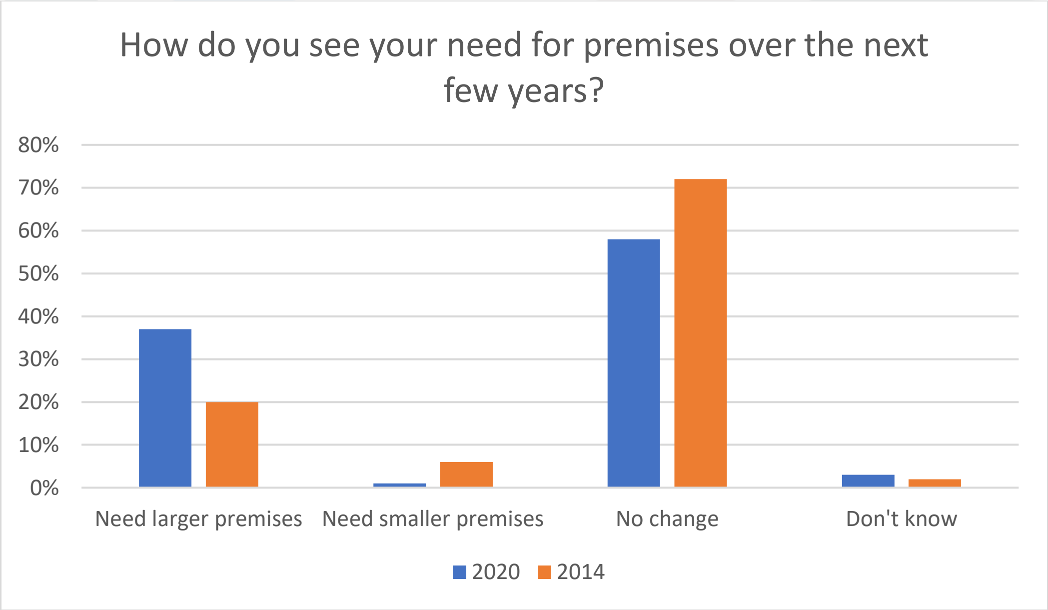


Figure 9 The companies' need for premises

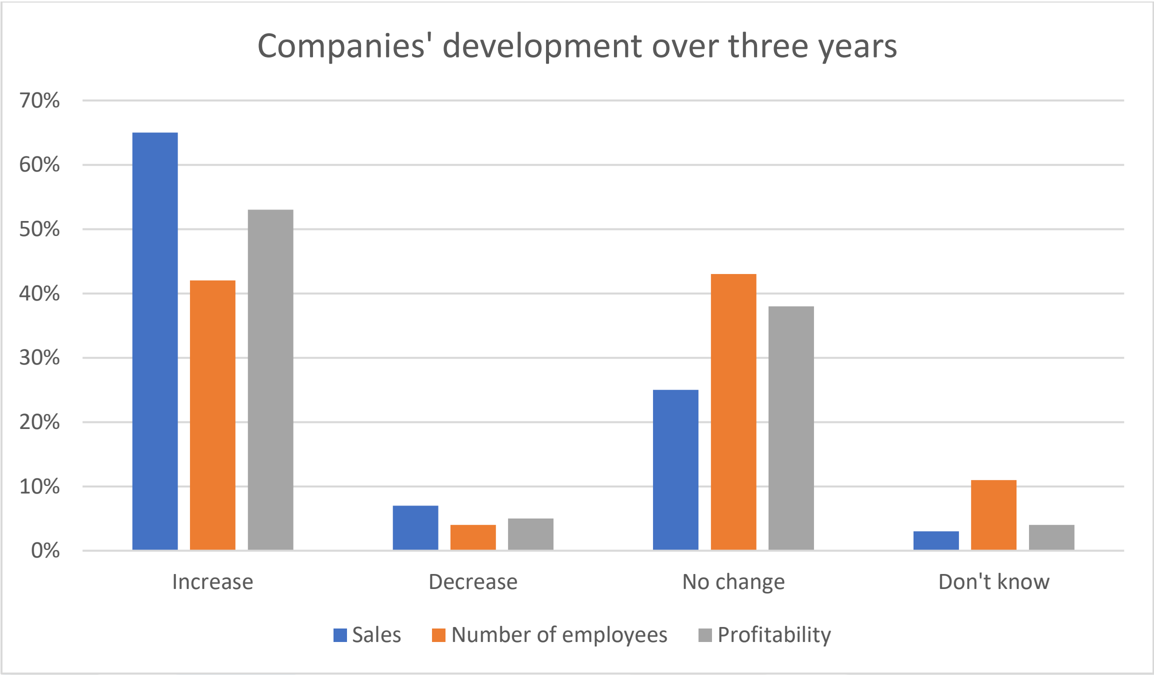


The interview responses show that companies in the sectors the sea as a natural resource and leisure and tourism stated the greatest need for land. 39 percent of the companies in these two sectors that responded said that they needed land, compared with 26 percent (maritime technology and production) and 14 percent (transport) of companies in the other two sectors.

4.7 The companies' development

The companies in the interview study were asked how they saw their development over the next three years in terms of sales, number of employees and profitability. 65 percent of the companies predicted increased sales. In terms of number of employees, roughly an equal number of companies answered that they predict an increase compared to those who predict no change over the coming years. Only 4 percent of companies said that they expect to have fewer employees. On the question of profitability, 53 percent of the companies expect their profitability to increase, 38 percent expect no change and 5 percent expect decreased profitability.

Figure 10 Companies' development over 3 years



There are variances in how the different maritime sectors see development over the next 3 years. The highest number of companies predicting an increase in profitability is found in the sectorthe sea as a natural resource, where 68 percent predict increased profitability. When it comes to sales, companies in the transport sector see the brightest future where 83 percent predict increased sales. Leisure and tourism sets itself apart from the average by predicting a greater increase in the number of employees over the next 3 years.

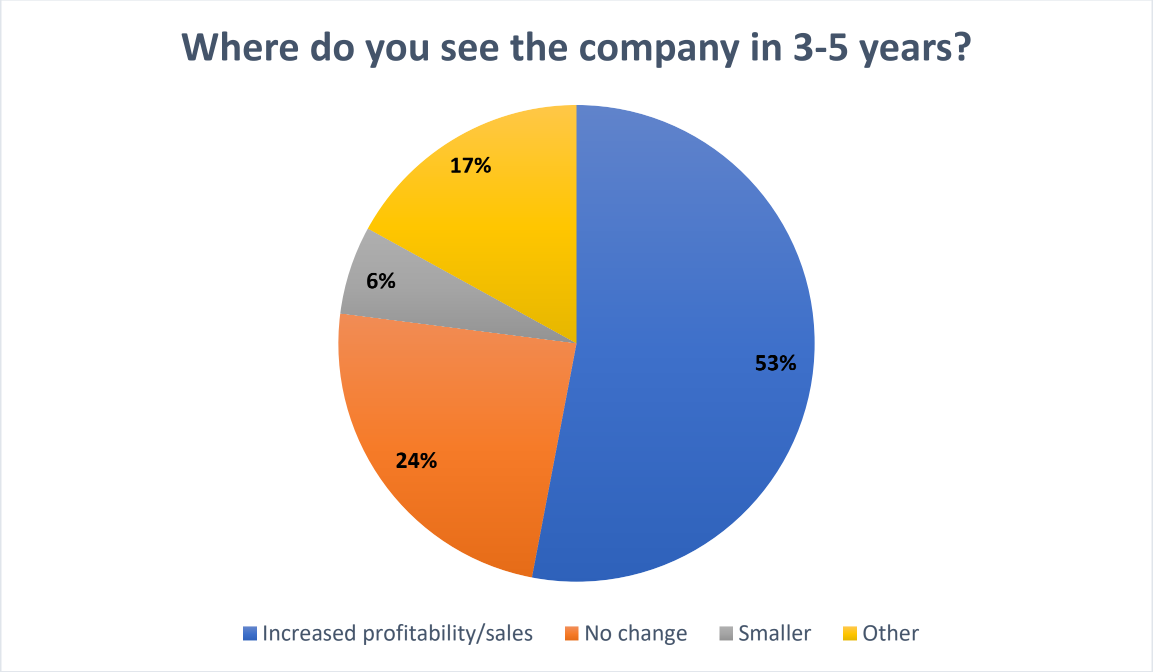
How do you see the company in 3-5 years?

The companies were also asked how they saw the future for their companies in 3-5 years and what would be needed to get there. About half the companies said that their business would have grown in various ways in 3-5 years. Apart from their own performance and hard work, the companies pointed to a number of external factors that would be significant for positive development of their own business. These are:

- The actions of municipalities and authorities
- Access to the right competence
- Access to land
- Access to premises

17 percent of the companies gave different responses to how they see their business in a few years' time. Half of these will see a new generation take over or will phase out the business in a few years' time. A few intend to change market, others say that they will specialise within their business sector or change the organisational structure.

Figure 11. Where do you see the company in 3-5 years?



To develop the answers further, the companies were asked whether they see any barriers or challenges to the business being able to grow over the next few years. Here, several companies mentioned a shortage of land, premises and the right competence. Other answers were about:

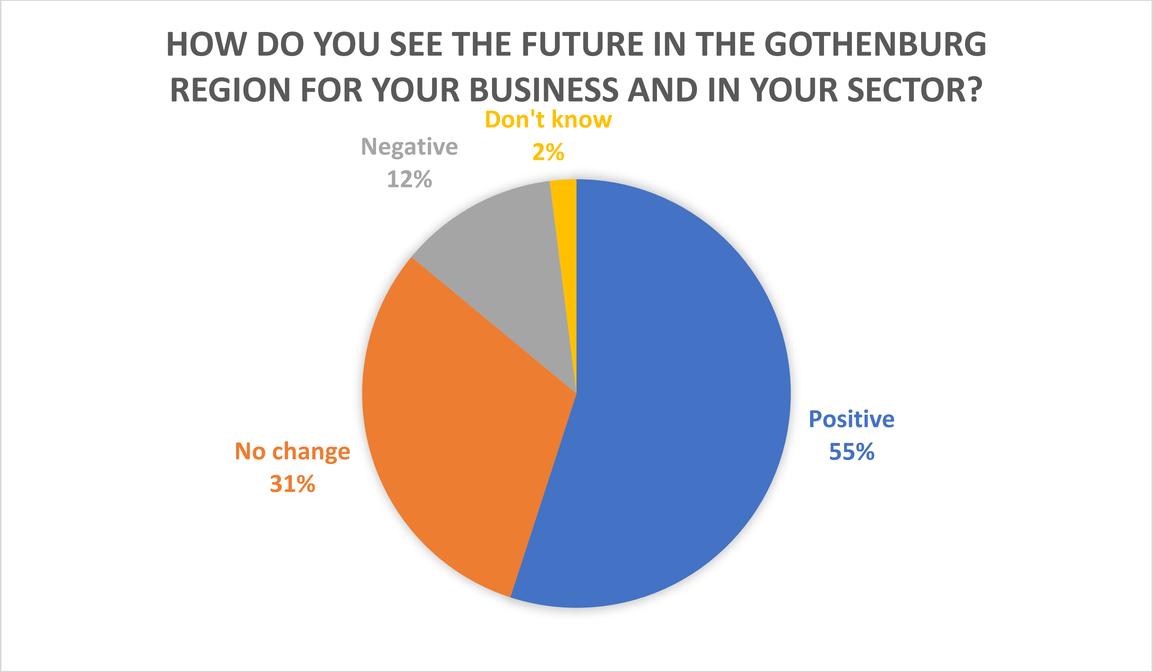
- Poor access to fish/shellfish
- The environment/climate
- Economic fluctuations and the political/economic position globally
- Decisions/permit issues/regulations/fish quotas
- Taxation

- Lack of collaboration/understanding/willingness from authorities/municipalities
-

4.8 The companies' view of the future

The interview study shows that 55 percent of the companies questioned, have a positive view of the future in the Gothenburg region within their respective sectors. In BRG's 2014 survey, more companies (66 percent) gave the same positive view of the future.

Figure 12 The future in the Gothenburg region



The responses of companies in the various maritime sectors were different. Companies in transport have the most positive view of the future in their sector, while the sector the sea as a natural resource has the largest proportion of companies with a negative view.

Figure 13 The future in the Gothenburg region in your sector/industry

	Positive	No change	Negative
The sea as a natural resource	54%	24%	22%
Maritime technology and production	56%	40%	4%
Transport	67%	28%	6%
Leisure and tourism	54%	32%	14%

The sea as a natural resource

The companies in the sector that had a negative outlook for the future think that small-scale fishing is in the process of disappearing and that competition from large foodstuff companies makes life difficult. One company mentioned Region Skåne's work with local fishermen as a good example that our region could learn from.

The companies that gave a positive response said that there is greater demand and a larger flow of goods, that Gothenburg is in a good position and that there are good conditions for development.

Maritime technology and production

The participating companies said that there is a positive spirit in the industry. A lot is happening in the Gothenburg region and it is a thriving region. They also see that boating is in a process of transition, which will bring about a change in conditions. The answers show that this is partly a result of a new generation of boat owners taking over, with greater demand for water scooters and rubber boats instead of sailing yachts, for example. It is also partly about the increasing electrification of boat motors.

In this sector, only 4 percent of the companies that responded saw a negative development. The companies think that the market looks good with increased demand but that a shortage of competence and permit requirements could form barriers.

> "It is a question of the industry getting smaller and going over to electric motors, but I don't see any great change happening over a 10-year period. It will not be possible to change the range of motors on offer before that."
> (Company in maritime technology and production)

Transport

67 percent of the companies that responded had a positive view of the future in the transport sector and several of these pointed to favourable conditions in the local (automotive) industry and the international market to explain this. More goods are coming into the port of Gothenburg and the companies point out that West Sweden is strong in terms of trade and shipping.

> "I think that we have a good research and development environment at Chalmers, Lindholmen and Johanneberg; the conditions are there"
> (Company in transport)

The companies that took a negative view of the future had a number of different reasons for this. One company responded that the shipping industry has stagnated, while another had chosen not to have as many Swedish customers because of developments in Sweden. The answers also mention that the average age in the sector is increasing.

Leisure and tourism

Many of the companies that had a positive view of the future point out that there is a great deal to do in summer. Being out on the water is popular and more and more people are discovering what the coast has to offer. Companies also mention the increasing tourism in the region as a contributive factor in the positive confidence in the future in the sector.

5. Conclusions and further work

There is a political driving force and a positive view that the maritime, or blue, industries can make a strong contribution to growth and employment, and not just in the coastal areas. The development of the maritime industries can also have synergies with other political objectives, for the climate and environment for example. If we together can grasp the potential, there is a great deal to gain.

As has been mentioned, the maritime industry consist of several different sectors that in many cases have different conditions. In this study, we have companies that represent transport, maritime technology and production, the sea as a natural resource and leisure and tourism. This must obviously be borne in mind when drawing conclusions, since the different sectors give different responses to a number of questions. Having said this, there are areas where the companies' responses point in largely the same direction, which indicates that there are areas where joint efforts can do a lot of good.

Land and premises

About a third of the companies in the study saw a need for land for relocation or expansion of their business and a somewhat higher proportion saw a need for premises. The importance of this aspect becomes even greater when we see that access to land and premises is highlighted by the companies as decisive for the development of their own business. An important part of further work will therefore be to increase knowledge of what this need means in detail so that it can be properly considered in planning and other processes.

A more specific need that companies mention that is also linked to land use is access to or location at quays and ports. This has also been identified in the inter-municipal coastal zone work and is part of the agreement on sustainable maritime businesses. Thus, the study supports the aspect that access to quays and ports is a key issue in which many sectors are affected and where joint efforts can have a great effect.

Local collaboration and the significance of location

For many of the companies, local and regional markets are the most important. The majority of companies also state that they are location dependent and for many their customers are local. This is also reflected in the interviewed companies having a very high level of local collaboration, mainly with other companies but also with educational bodies. However, considerably fewer state that they collaborate with the municipality.

Of the companies that do not at present collaborate locally, the majority are interested in finding partners to collaborate with. Several also mention that they would like more collaboration with the municipality. Meeting places as a point of contact with the municipality, both politicians and administrators, are also highlighted as an important aspect when companies are asked what they are missing in their location that would enable growth and development. It is therefore important here to identify what questions the companies want to talk to municipal actors about and what forms or meeting places work best for this dialogue. Permit issues and rules are some of the areas that the companies highlight as important.

There are also a number of established networks and meeting places for maritime industries in which municipal actors could participate. Many of these networks and meeting places have connections with the maritime cluster in West Sweden, so there is a natural point of entry.[13]

Competence

As with BRG's 2014 survey, this interview study indicates that the provision of competence is a decisive factor for the continued development of the maritime businesses. Most of the smallest companies state that there is a shortage of competence and this is stated to be one of the greatest challenges or barriers to the ability to grow. The companies in the study say that this is largely about a need for experienced personnel or people with the right qualifications/formal education. Collaboration between different actors is needed here, to identify future competence needs for the different sectors of the maritime industry. The study also indicates that several sectors need similar competence, which also needs to be clarified in a review of competence.

SMTF (the Swedish Marine Technology Forum) and Chalmers have taken a joint initiative to investigate possibilities for establishing a competence centre for maritime businesses, focusing on shipping and maritime technology, to which they are inviting other actors. If this is successful, it could also be a model for other maritime sectors.

[13] https://www.maritimaklustret.se/

Continued and expanded collaboration

The results of the interview study show that the majority of the companies that responded take a positive view of the future and predict increased sales over the next few years. Many also saw possibilities for increasing the number of employees.

We must presume that this picture has been turned on its head, given the present situation of a global pandemic that is having a great impact on the economy. Some respondents also specifically pointed to the global political and economic position (more generally) as a great challenge to future development. Regardless of the present position, there is still potential for developing sustainable maritime industries and perhaps it is even more important now to formulate strategies for achieving this. A sustainable industry in the long term is one of the prerequisites for the life of the coastal communities.

Continuing work to create the conditions for positive development must be done as a collaboration between different actors in which space is allowed for different perspectives. It is to be hoped that this study has helped to turn the spotlight on some of the areas that will need common efforts that will benefit many sectors in the maritime industries.

5.1 The companies' continued commitment

After the interview study, e-mails will be sent to the participating companies, with the exception of those that chose to be anonymous (30 percent of the participating companies). In the mailing, results of the study will be presented as well as more information about the project and how they can still be involved in it.

Partners

Website of the Interreg project: www.land-sea.eu

Look up and follow us on social media #LandSeaAct

Appendix 1. Questionnaire

Markets and competence

1. Is your company part of a group?
2. What are the company's most important markets?
   (Multiple choice question)
3. To what extent do you work to attract, develop and keep the right employees?
4. Is there access to the right competence for your company on the market?

Collaboration and meeting places

5. Do you collaborate locally with other companies, the municipality or an educational body?
6. Do you meet local politicians? What are your main topics for discussion?
7. Do you participate in meeting places or networks with:
   a. Public actors and authorities?
   b. Companies in the same industry or industry networks?
   c. Companies in other industries?
   d. Researchers in academia or research institutions?
   e. Other?

Conditions and needs

8. Is your business season-dependent?
9. Is your business location-dependent?

10. What proportion of your customers are permanent residents or other companies in the locality?
11. Are you dependent on the local offering of commercial services for your business?
12. Is there anything you miss locally that could help your business to grow and develop?
13. What is your need for premises in the next few years?
14. What is your need for land in the next few years?
15. If the company needs land or new premises - would you be willing to move to another locality?

<u>Future</u>

16. How do you think your company will develop in the next three years in terms of:
    a. Sales?
    b. Number of employees?
    c. Profitability?
17. Where do you see the company in 3-5 years?
18. What is needed to get there?
19. Do you see any challenges or barriers? What are they?
20. How do you see the future in the Gothenburg region for your business and in your sector/industry?
21. Finally, is there anything you would like to add, any more information you would like to highlight?
22. Do you accept that the Gothenburg Region will know that it was you who answered these questions?