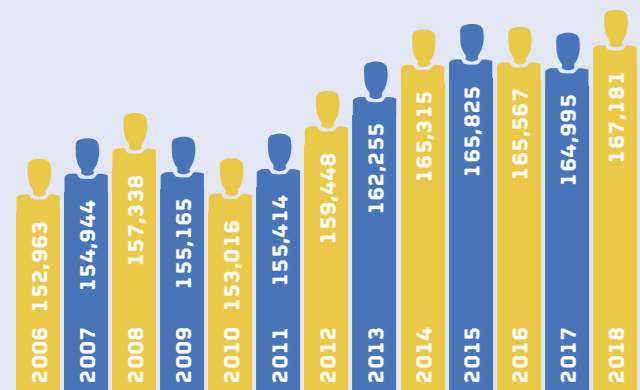
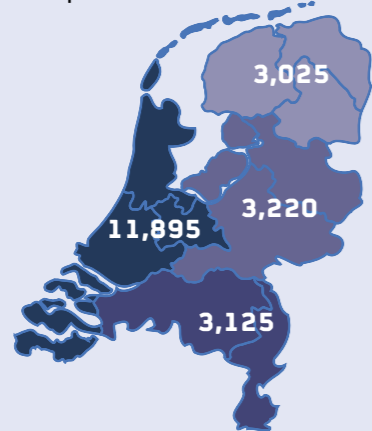




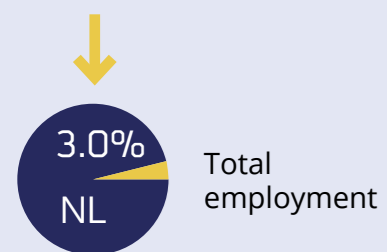
FACTS & FIGURES HUMAN CAPITAL



Regional spread of Dutch maritime enterprises



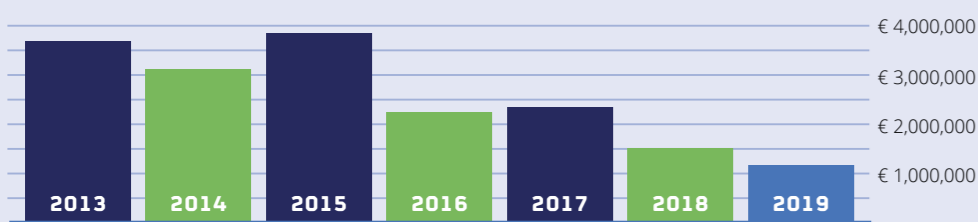
Employed directly in the maritime industry
In 2018 276,877 people were employed in the maritime industry (directly and indirectly)



	2017	2018
North of the Netherlands	3,015	3,025
East of the Netherlands	3,155	3,220
West of the Netherlands	11,885	11,895
South of the Netherlands	3,070	3,125
Total	21,125	21,265



FACTS & FIGURES INNOVATION



Topconsortia for Knowledge and Innovation (TKI) Maritime
Extra earned allowance for maritime R&D projects.

The maritime cluster and its coherence



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Nederland Maritiem Land
High Tech, Hands On

The Dutch Maritime Cluster

Monitor 2019

Summary

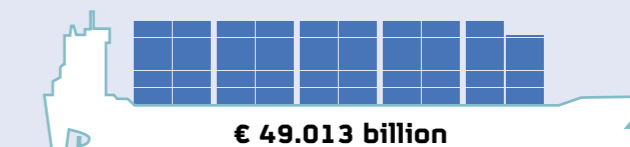
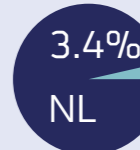


FACTS & FIGURES TRADE

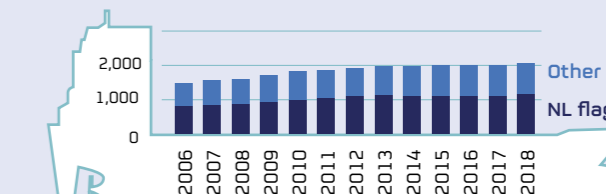


Added value 2018

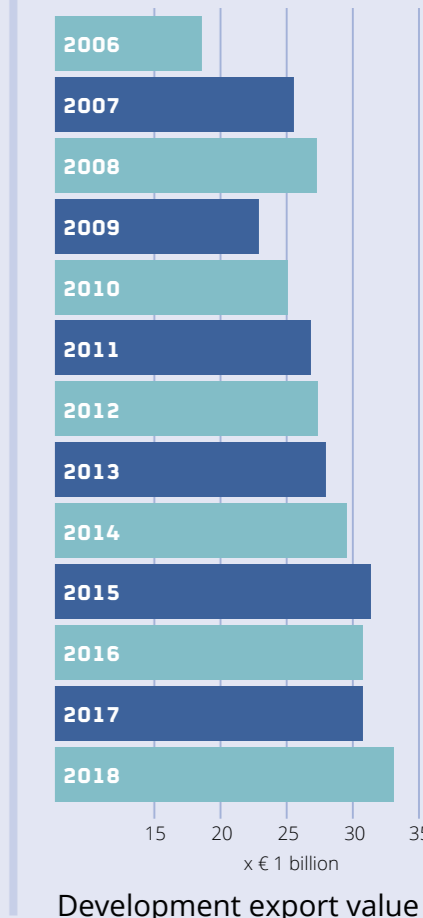
GDP percentage



Production value 2018



Vessels under Dutch fleet management



Development export value

High tech, Hands on



Learn more about the Dutch maritime cluster www.maritimebyholland.com

Maritime sector: High Tech, Hands On

Background and Goals

Ecorys has carried out this annual monitoring study for the maritime cluster on behalf of the Ministry of Infrastructure and Water Management and in cooperation with Stichting Nederland Maritiem Land. The Dutch maritime cluster consists of the following sectors: shipping, shipbuilding, offshore (energy), inland shipping, dredging, ports (cargo handling), navy, fishing, maritime services, yachtbuilding / watersport industry and marine equipment supply.

This study consists of a description and analysis of the economic and labour market for 2018. As well as the market trends from 2006-2018. A major change has been the revised method for data collection. On request of the Ministry of Infrastructure and Water Management there has been a close cooperation with Statistics Netherlands (CBS). The research team has provided CBS with input. CBS provides output results for the different indicators based on their own unique sources of data per sector. A pilot study was conducted for the offshore sector in the monitor to validate this new method.

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More information: www.maritiemland.nl

The results under this new approach have been discussed with the different sectors involved. This has been done both in plenary as in separate interviews. These interviews were also used to discuss the main market trends.

Because of the focus on the new methodology only limited attention to the labor market is paid. Information on the regional effects of the maritime cluster is provided. Finally, this edition of the Maritime Monitor now replaces all previous editions.

Labour market

The maritime industry is changing at a fast pace. The competition for (technical) intake of personnel is growing. In order to have adequate personnel in the future, collaboration is key.

Therefore, we started a labour market branding campaign in 2019, which is called "Maritime by...". An online editor has been developed through which organizations can share real stories of their employees. The support within the industry for this initiative is increasing as we speak.

Another key aspect is to keep maritime personnel 'on board'. Collaboration is also crucial in this matter. Challenges like staff exchange, education and coaching are discussed during the Human Resource circle of the "Maritiem Leer- en Ontwikkelcentrum" (maritime skill development centre). Opportunities are exploited during these meetings.



**Contact
Labour Market:**
Leon Maas,
secretary
Human Capital
Council

The maritime cluster in 2018

The cluster generated a direct added value of € 18.6 billion in the Netherlands. Indirectly, € 7.5 billion was also added. The maritime cluster generates approximately 3.4% (2017: 3.0%) of the gross domestic product (GDP) of the Netherlands. In 2018, the maritime cluster employed 276,877 people, of which approximately 167,181 were direct labourers. As a result, the total number of employees in the maritime cluster is equal to 3.0% (2017: 2.9%) of employment in the Netherlands.

In 2018 the number of people employed in the Netherlands grew by 2.5%. The direct employment in the maritime sector grew by 1.3%. Indirect employment grew with more than 10%. Reason for this are higher employment multipliers in 2018. This implies that the backward effects of the cluster are larger. A job in the maritime cluster generates a larger number of jobs in sectors that work for the maritime cluster.

The direct added value of the maritime cluster has increased with 4.6% compared to the revised figures for 2017. The fact that this increase exceeds the rise in employment clearly shows signs of further economic recovery.

The questions within the cluster are how can we: keep the knowledge and skills within the industry? Encourage flexibility? Take care of intake of qualified personnel?

The labour market campaign, as well as the Human Resource circle, will contribute to a futureproof labour market within the maritime industry.

Export

After a lean year in 2016, the maritime industry has grown in 2018. The export increased in 2018 with 5.2%. The total export of the maritime cluster amounted to nearly € 33 billion in 2018, an increase compared to 2017 (€ 31.6 billion). The ports and offshore are the largest export sectors with € 9.877 billion and € 6.765 billion in 2018.



**Contact
Export:**
Erik Salverda,
secretary
Trade Council

The increase in the direct added value of the cluster is marginally lower than the GDP growth of the Netherlands (+4.9%). The indirect value added grew considerably by 65%. For total value added this means a 16% increase compared to 2017.

The total export of the maritime cluster amounted to € 33 billion in 2018, an increase compared to 2017 (€ 31.6 billion). The export of the cluster has grown. The biggest sector is the ports sector. Second is the offshore sector with an estimated export figure of € 6.7 billion in 2018. The maritime cluster accounts for 7% of all Dutch export value (total € 496 billion).

Sustainability

Emission reduction, fuel efficiency, ship recycling and robotics from the Netherlands are of importance to make a greener world. Many companies are developing products that contribute. Corporate social responsibility is very important. The Dutch are very innovative and sustainable-minded. In June 2019 the government and the industry have signed the Green Deal for shipping, ports and inland water transport.

Innovation

In 2019 the renewed top sectors policy have four missions which are based on societal challenges.

The missions in 2019 are: energy transition and sustainability, agriculture, water and nutrition, (health) care and (cyber, defence, and water) safety. The maritime cluster has connected the top sector policy to four maritime topics and maritime key technologies. The four maritime topics are towards zero emissions, Digital and autonomous shipping, Blue Growth and safety & security. The maritime key technologies are: digitalization, Artificial intelligence, robotisation/Virtual Reality and Materials



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TKI Maritiem

Check for more information:
www.maritimebyholland.com