



Dutch Maritime Cluster

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1. Background

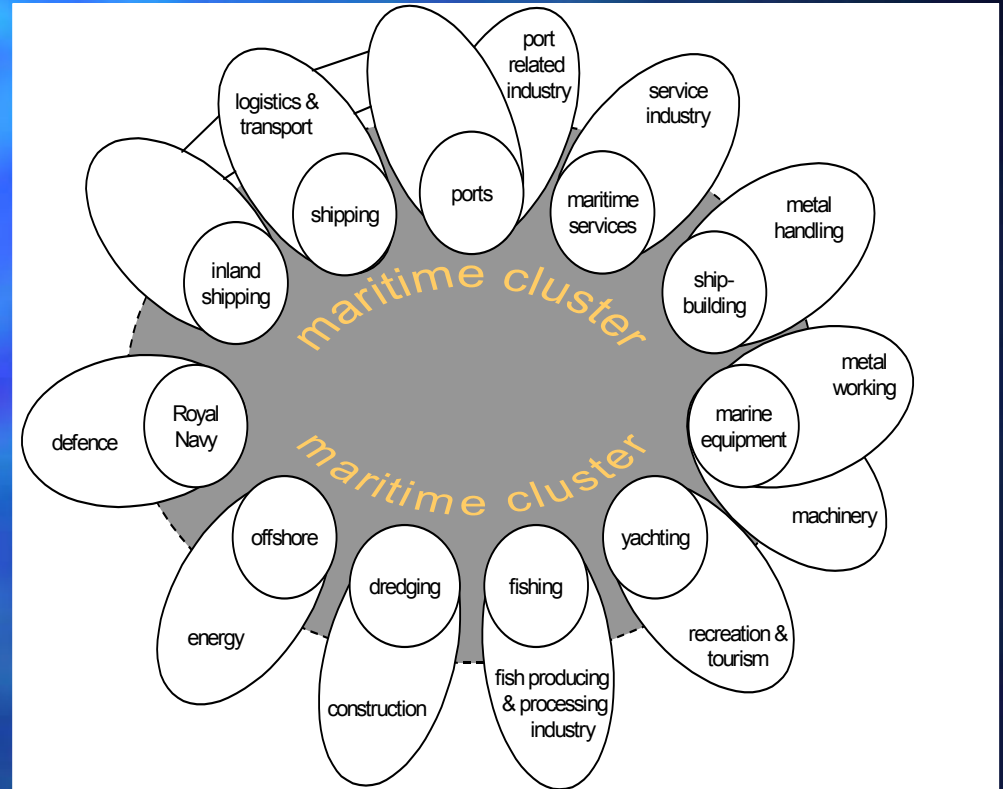
- Innovative Dutch Shipping Policy, January 1996
- Recommendations for a supporting network structure
- Ministry preference for cluster approach
- Stichting Nederland Maritiem Land, founded June 1997
- Operational, by October 1997



2. Dutch Maritime Cluster

11 Sectors

- Shipping
- Shipbuilding
- Ports
- Inland Shipping
- Dredging
- Offshore
- Equipment Suppliers
- The Royal Navy
- Maritime Services
- Yachting Industry
- Fishing



2. Dutch Maritime Cluster

Sector Characteristics

- Sectors are prominent
 - Make up a very complete cluster
 - Trade organisations act individually, though problems are comparable
 - Under different Government departments
 - Traditional
 - Not communicative
- and
- Statistically unknown

2. Dutch Maritime Cluster

Economic indicators *)

	1997	2002
Turnover	17.8	21.4
of which Export	9.9	12.6
Production Value	15.3	18.5
Added Value Direct	8.0	9.5
Added Value Indirect	2.9	3.1
Total Added Value	10.9	12.6

Growth Sectors:

Shipping, Dredging, Yacht building, Maritime Services

*) All figures in € billion, current prices

2. Dutch Maritime Cluster

Economic indicators (continued)

- Employment

Direct 135.000 Persons

Indirect 55.000 Persons

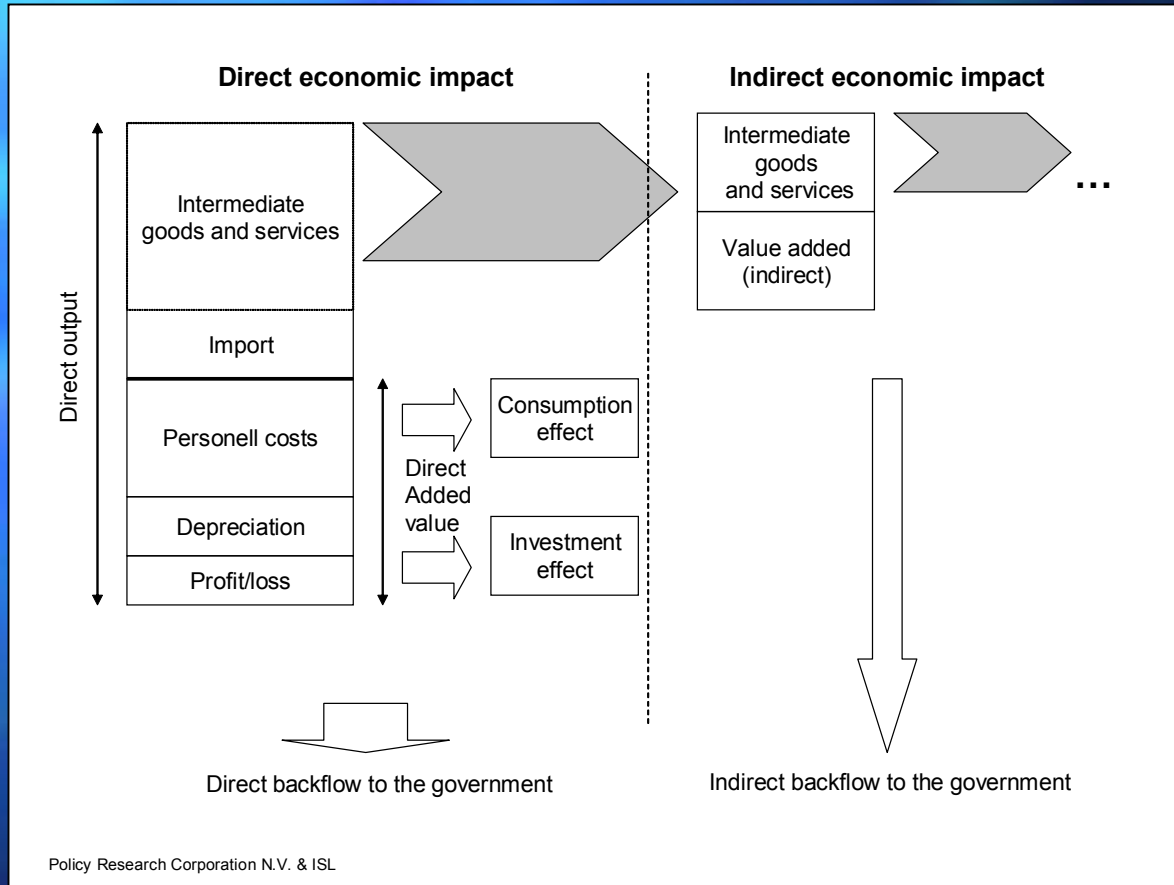
Total 190.000 Persons

Foreign Subsidiaries 34.000 Persons

- Total Value added 2.9 % GNP
- Export 63 % Maritime Turnover
- Export 5.4 % Total Export
- Back Flow € 4.5 Billion

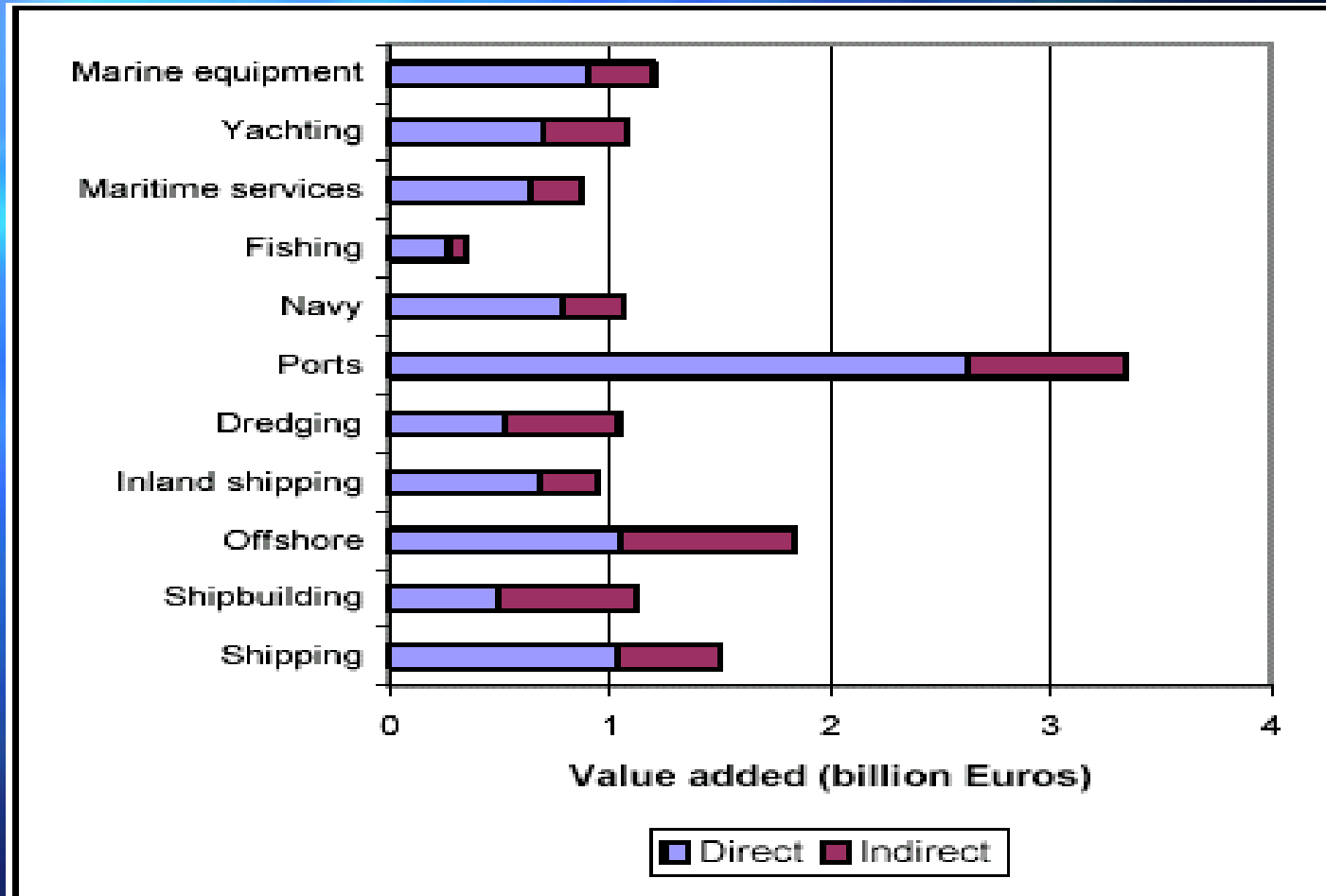
2. Dutch Maritime Cluster

Direct, indirect and other economic impacts



2. Dutch Maritime Cluster

Value added, per sector, 2002



3. The Cluster Organisation

Mission

- To promote and reinforce the Dutch Maritime Cluster
- Based on: Own responsibilities of companies & trade organisations

Cluster (Michael Porter)

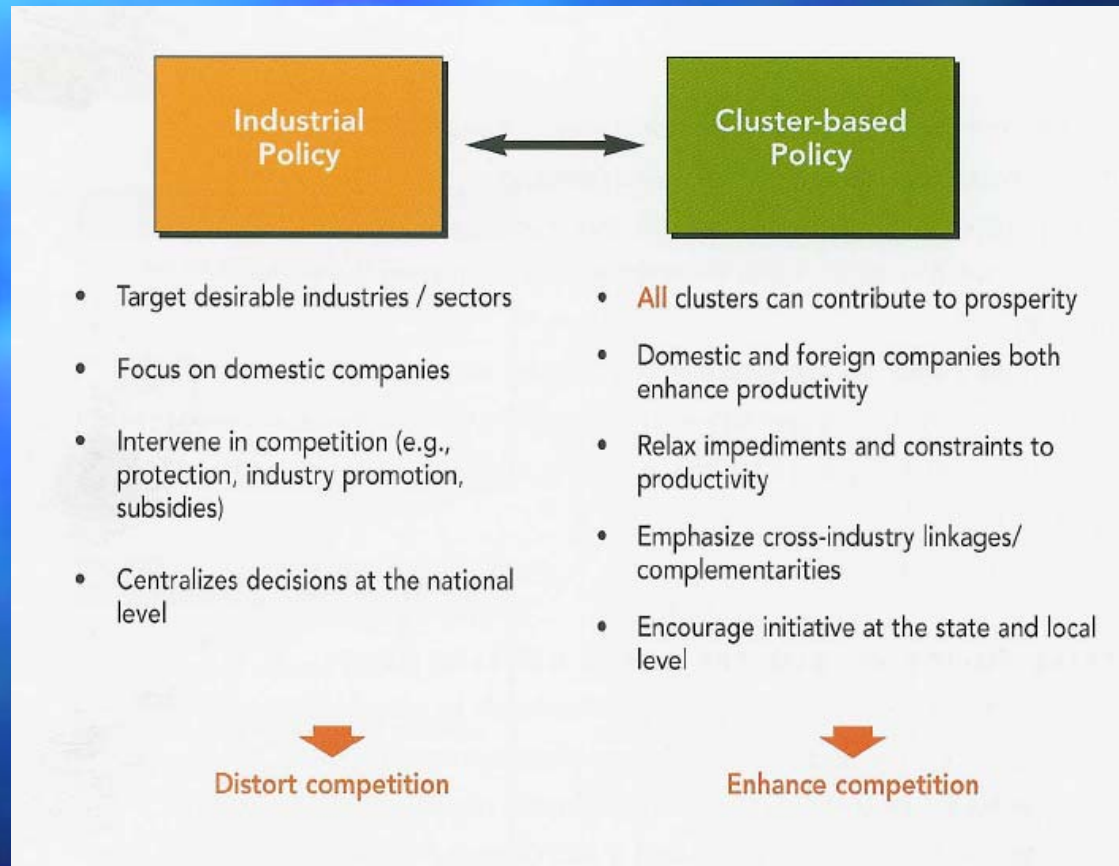
- Related economic sectors in a defined geographical area
 - More innovation and economic growth
 - Based on cooperation business community, government, universities

Organisation

- Pure Network
 - Platform for discussion and action
 - Only cluster activities

3. The Cluster Organisation

Porter: Industrial policy versus Cluster-based policy



3. The Cluster Organisation

Board

- Prominent persons of the various sectors
- Personal title
- Government as observer

Office

- Small and flexible

Participating maritime trade organisations

- Advisory council to the Board

Selected themes

- Communication, innovation, export
- Labour market and education (nautical/maritime)

4. Themes and Projects

Communication

Target Groups

- Community at large
- Government
- Young people
- Foreign customers

Products

- Magazines
- Publications
- TV productions
- School TV
- Port visits
- School information tools
- Information stand and website

4. Themes and Projects

Export and Internationalisation

Export is important

- 63% turnover
- 5,4 % of total Dutch Exports

But becoming more difficult → Internationalisation

- Production considerations
- Market considerations
- Cluster considerations

Export and Internationalisation Projects

- Study and Awareness
- Joint promotion and participation trade fairs
- Holland Marine House China / Shanghai

4. Themes and Projects

Porter: Clusters stimulate and enable innovation



- Innovation is **more than just scientific discovery**
- There are **no low-tech industries**, only low-tech firms

4. Themes and Projects

Innovation

Innovation Forum: sub themes

- Digital Ship
- All Electric Ship
- Sustainability, Safety, Environment
- Company Innovation and Diffusion
- Cluster Strategies
- Europe

4. Themes and Projects

Labour market and Education

Labour market

- Inventory
- Monitoring

Education

- Image
- Information

High level Platform for trade and labour organisations and educational institutions on:

- Improving quality educational institutions
- Streamlining flow from lower to higher vocational levels
- Tuning quality / demands supply and demand

5. Cluster Concepts

Cluster Concepts in Development

- Cluster Policy: Roundtable Conferences with leader firms and government
- Leader Firms network
- Internationalisation
- European Maritime Cluster Organization
- European maritime cluster projects: **Shortsea Fleet Renewal Project**

6. Conclusion

In conclusion

- Maritime Cluster firmly on the map
- From study -> operational phase
- Gained experience can be shared

Because

- What is good for Maritime Europe is good for the Dutch Maritime Cluster