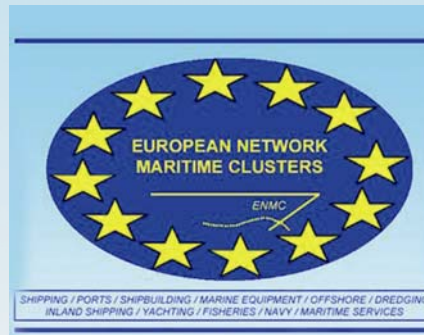




Recent Developments and Outlook

DUTCH MARITIME NETWORK



4th Roundtable of the European Network of Maritime Clusters
Rome 30 September / 1 October 2008

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Dutch Maritime Network, Structure & Scope

- Juridical Structure** : Foundation
- Mission** : to promote and reinforce the Dutch Maritime Cluster
- Members** : - Trade associations:
Shipowning, Shipbuilding, Inland Shipping, Offshore, Dredging, Watersports Industry, Marine Equipment Supply, Fisheries, Maritime Services (Knowledge Institutes, Consultants)
- Other:
Ports of Amsterdam / Rotterdam, Navy (non paying)
- No companies or private persons
- Organizational Structure** : Network

Dutch Maritime Network, Structure & Scope



Governance

1. Board
 - prominent persons from all sectors
 - personal title, no representation
 - government observer status
2. Advisory Board - C.E.O.'s member organisations
3. Working Groups - communication, export, innovation, labour & education
 - project ideas & execution

Dutch Maritime Network, Structure & Scope

Annual Budget

- | | | |
|------------------------------|---------|---|
| 1. Office | € 360 k | (government / members) |
| 2. Activities | € 490 k | (requiring cofinancing) |
| - communication & clustering | | |
| - export | | |
| - labour / education | | |
| 3. Secretariat | € 250 k | (on behalf of Dutch government) |
| - innovation programmes | | (plus € 200 k project money, requiring cofinancing) |
| - human capital | | (plus € 225 k project money, requiring cofinancing) |

Office

- | | |
|--------------------------|-------------|
| 1 managing director | (f/t) |
| 1 professional secretary | (p/t) |
| 3 office staff | (p/t) |
| | Total 3 fte |

Dutch Maritime Network, Recent Developments



General

- New Government Innovation Policy: Backing the Winners
- DMN/MKC file application
- Dutch Maritime Cluster nominated as “key economic area” (KEA)
- Innovation Vision and Plan, resulting in:
- Innovation Program:
 - Shipbuilding, Marine Equipment, Offshore, Yachtbuilding, Dredging
 - Innovation, Export, Human Capital

Dutch Maritime Network, Recent Developments

Communication

Studies & Reports

DMN 30 Dynamic European Maritime Cluster

DMN 31 Economic Monitor Dutch Maritime Cluster

DMN 32 Labour Market Monitor

Magazine : Maritiem Nederland (10x p.a.) + Specials

Youth Programme : (KEA: “Spetters Gezocht”)

- Website: www.spetterendeopleidingen.nl
- Digital Newsletter, Folders, Flyers
- Pavilion and Experience for exhibitions and manifestations
- Ports visits
- Vocational information
- Projects with Schools & Scouting
- Gadgets

Export and Internationalisation

- Support for joint approach
- KEA, government + export stimulation programmes, 2g@there :
 - Germany
 - Russia
 - Brasil
 - India
 - Persian Gulf
- Networks established: from project support to Holland Branding.

Dutch Maritime Network, Recent Developments



Innovation

No longer Dutch Maritime Network Budget for Innovation

Many Maritime Innovation Initiatives :

- Maritime Innovatie Forum :
 - Cluster wide
 - Seed money / incubation
 - DMN secretariat / execution
- Maritime Innovation Board :
 - Merchant Shipping
 - Sustainability, Safety, Efficiency, Education
 - DMN Secretariat
- Maritime Innovation Council (KEA) :
 - Ship & Yachtbuilding, Marine Equipment, Offshore, Dredging
 - Complex Specials, Deepwater, LNG, Human Capital
 - NW Vice Chair
- Fisheries Innovation Platform
 - Fisheries
 - Upstream & Downstream
 - NW Board Member

Other:

- Inland Shipping Expertise and Innovation Center
- Order related Ship Innovation Support (re. LeaderSHIP 2015)
- Port Innovation Support
- Platform Emissions

And in Europe:

- Waterborne Technology Platform
 - NW Chair Mirror Group, member strategy group
 - copromotor Conference
 - copromotor TOR EIT/KIC Study

Labour Market & Education

- Labour Market:
 - New monitoring study nearing completion
 - KEA : Human Resource Management
- Education:
 - KEA : Joint approach maritime technology sectors to develop integrated education at selected vocational institutions
 - Solistic approach shipowners, frustrating joint nautical approach

Dutch Maritime Network, Outlook 2008 - 2012



- 2008 External Evaluation:
 - Four more years?
 - Budget?
- Internal Investigation:
 - Increased cooperation trade associations?
- New Economic Monitor:-
 - Checking fundamentals
 - Incorporating international aspects
- 2009 New four year plan
 - Structure and Scope
 - Themes:
 - Statistics and Cluster promotion
 - Youth Programme
 - Europe
 - Labourmarket & Education
 - International Holland Branding
 - Realignment Innovation Initiatives