



HOLLAND
SHIPBUILDING
a s s o c i a t i o n

Shipbuilding technology in the Netherlands

Klik om het opmaakprofiel van
de modelonderdelen te bewerken

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Holland Shipbuilding Association

- Holland Shipbuilding Association is a co-operation of VNSI and Holland Marine Equipment Association (HME)
- 400 member companies, 30+ staff
- Turnover € 7.6 Billion
- Export € 4.5 Billion
- 35.000 persons directly employed
- Office in Zoetermeer, Rotterdam, Shanghai and Hanoi
- **Activities**
 - International (trade shows, market info, trade missions)
 - Innovation support (collective projects)
 - Human Capital
 - High level networking events

Orderbook Dutch Shipbuilding

Facts and Figures Dutch Shipbuilding

Dutch Shipbuilding 2007 in categories*

Inland vessels

* Shiprepair turnover in 2007 amounted to € 664 million, making the Netherlands the 2nd largest European shiprepair country

Position in Europe

Co-operation: The Dutch Maritime Cluster

- Dutch Maritime Network: Strong Network Organisation
- CESA: Community of European Shipyards Associations
- EMEC: European Marine Equipment Council
- Holland: 'Europe's Maritime Valley'



- Production value € 27 bln
- Export share 64% (5.5% of total Dutch export)
- Added value € 13.3 bln
- Employment 190,000 ppl
- Number of companies 11,500

2005 to 2008: sharp growth of Dutch shipbuilding and supply industries

MOST COMPLETE CLUSTER IN THE WORLD!

Five Strategies for the Future

1. Competing through talent
2. Sustainability and innovation
3. Increasing synergies within the cluster
4. Cooperating with the government
5. International branding of the Dutch shipbuilding cluster



Government Policy: Stimulate Innovative Technology

- Maritime Innovation Programme
- Shipbuilding Innovation Aid
- Innovative Regulation for Inland Shipping

Maritime Innovation Programme

- An innovation programme, developed in cooperation with the industry
- The programme consists of several sub programs:
 - Innovation projects for the industry.
 - Offshore: LNG, Deep Sea
 - Complex specials: Superyachts, Dredgers, Offshore specials, Naval vessels, Short Sea specials
 - Human capital projects to strengthen the quality of the workforce in industry
 - Project integrated cooperation

- Aim is to stimulate innovation in shipbuilding projects
- Many innovations contribute to sustainability
- Support concerns the innovative aspects of the shipbuilding project
- Programme is within European framework legislation

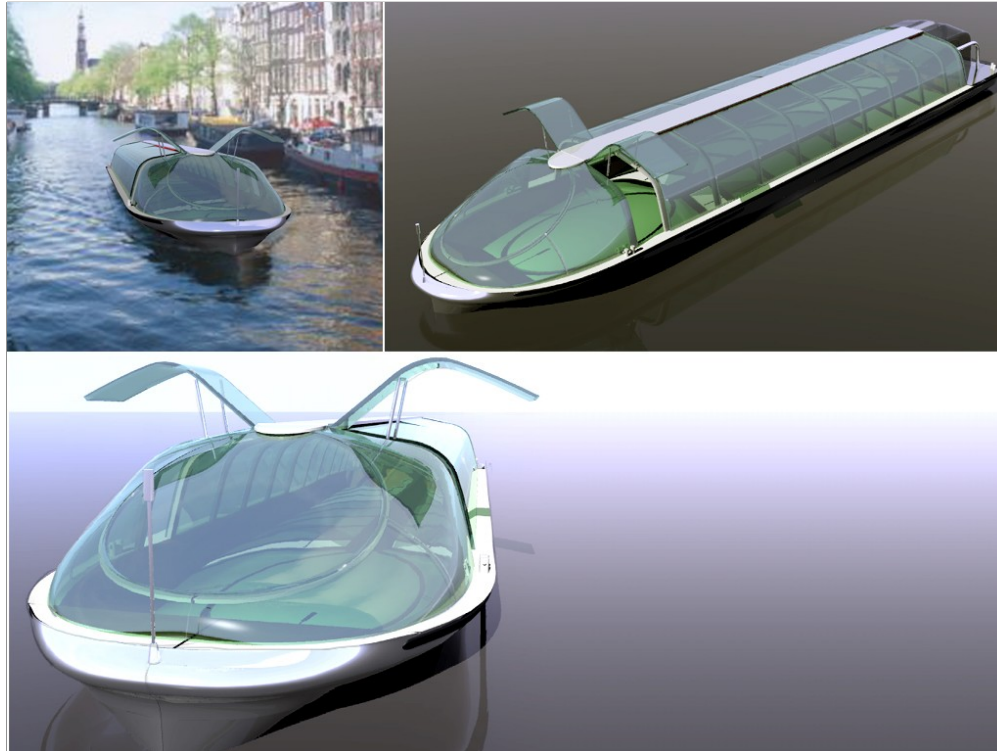
- Cooperation with associations for inland shipowners to come to innovative projects
- Projects on air emissions (SO_x, NO_x, CO₂ and particulate matters)

Examples of Innovation in Inland Navigation

Drivers for innovation:

- Increasing legislation on pollution
- Lower fuel consumption/alternative fuel
- Increasing size of vessels
- Lightweight vessels
- More comfort on board
- Increasing safety demands

- Reduction of emissions and fuel consumption



Electric Shore Supply

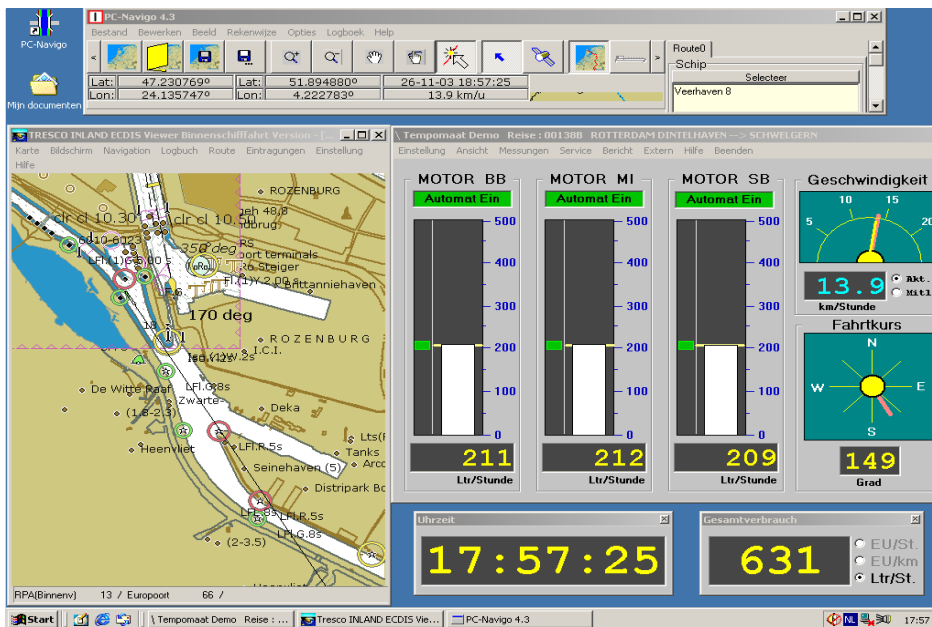
- Improvement local air quality



- Reduction of SOx: Clean fuel
- Reduction of NOx: SCR, Selective Catalytic Reduction
- Reduction of PM: Clean fuel and soot filter



- Reduction of CO2 and all other gasses and particles



Dutch Shipbuilding and the Crisis

- Orderbooks until 2010-2013
- No significant cancellations

But banks are very restrictive and new orders are becoming more scarce. Holland has confidence in technology leadership, even in worse times to come.

EUROPORT 2009

connecting the maritime world

ADVANCED TECHNOLOGY
IMAGINATION
BECOMING REALITY



3-6 November 2009, Ahoy Rotterdam

Core Competences

Europort

- takes place in the maritime capital of Europe
- is the 2nd largest maritime exhibition worldwide
- is market leader for inland shipping and dredging
- has strong focus on advanced technology
- 850 exhibitors, 38,000 m² exhibition space

Exhibition profile

Europort is serving all maritime industries:



INLAND NAVIGATION



SEA SHIPPING



DREDGING



OFFSHORE



MEGA YACHTS



WORKBOATS



CONSTRUCTION VESSELS



FISHERY



NAVAL SPECIALS

with products and services in the field of:

- Shipbuilding, repair & Conversion
- Propulsion and manoeuvring
- Electrical and electronic systems
- Mechanical and auxiliary systems
- Deck, safety and special equipment
- Maritime services

‘I draw your attention to the ambitious structural reforms in our country’s shipbuilding and port sectors, which are areas in which the Netherlands has particular interest and skills’.

President Lula da Silva of Brazil during his state visit to the Netherlands on 11 April 2008.

