



Policy Research Corporation N.V.

Economic Impact of Maritime Industries in Europe

Prof. Dr. Chris Peeters

- High Tech at High Seas -
European Parliament, November 7th 2000

The maritime cluster



The maritime industries have a problem of image

Negative publicity

- Environment
 - ◆ substandard shipping
 - ◆ contaminated dredging sediments
 - ◆ sinking of old offshore platforms
 - ◆ overfishing
- Social conditions
 - ◆ crew on some open registered ships
 - ◆ labourious jobs with little spare time
- Burden on public budget
 - ◆ perception of heavily subsidised activities

Too little information

- Focus on B2B, but neglecting
 - ◆ general public
 - ◆ interest groups
- Difficulties in attracting
 - ◆ employees
 - ◆ investment capital

► Knowledge about own identity is crucial step to a better image

Economic Impact Study (EIS[®]) provides insight in a sector's importance

The Netherlands

- ◆ EIS[®] on Dutch shipping sector
- ◆ extensive & detailed cluster EIS[®]

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The Netherlands:

Employment in persons, other indicators in million EUR (1997)

	<i>Direct</i>	<i>Total</i>
Production	14 948	
Value added	7 777	10 611
Employment	137 400	193 500
Backflow	2 540	3 848

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European Union + Norway

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Backflow

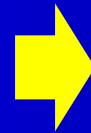
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► EIS[®] facilitates efficient communication with all stakeholders

EIS[®] can be used to calculate the effects of policy alternatives in advance

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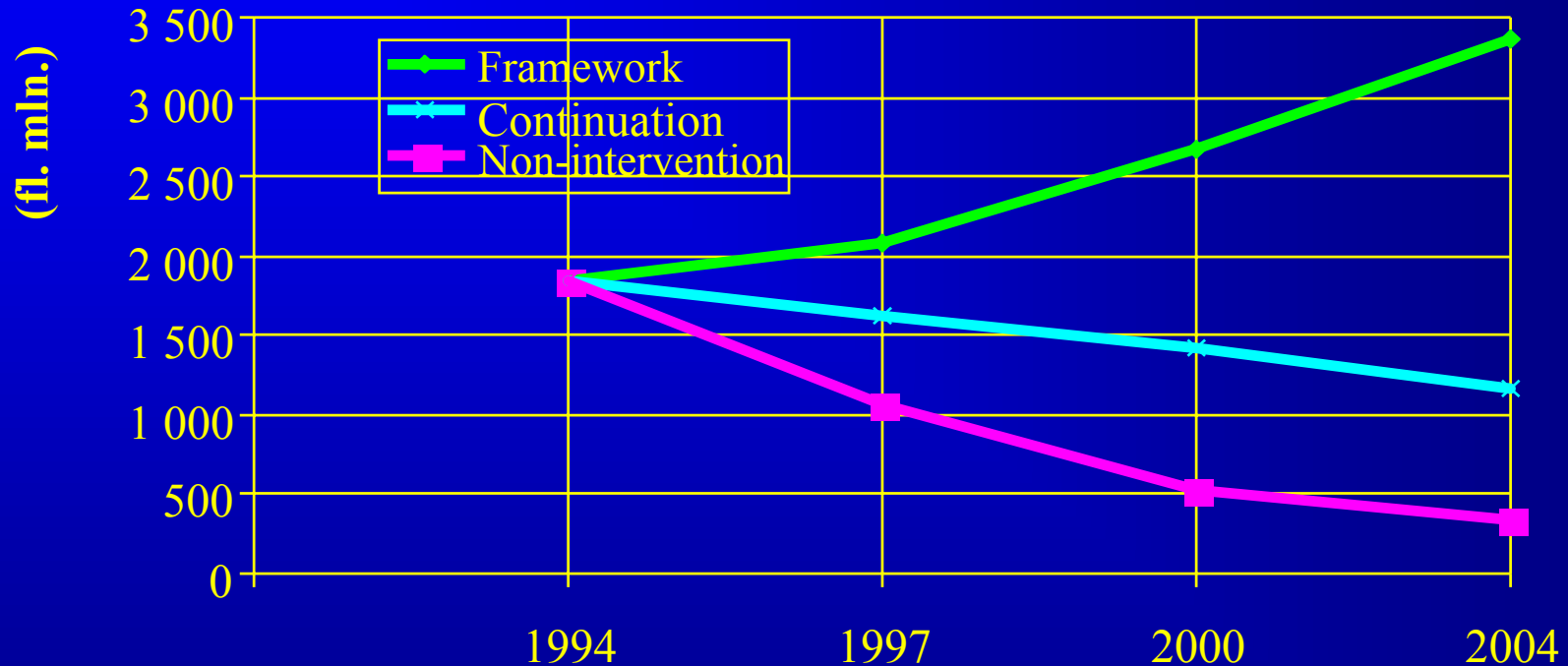
- successful shipping policy
- new maritime dynamics
- Dutch Maritime Network
- stimulating actions from private & public sector

Octagon for Dutch shipping sector



The new Dutch shipping policy is very successful

Projected evolution value added of Dutch shipping sector under different scenarios

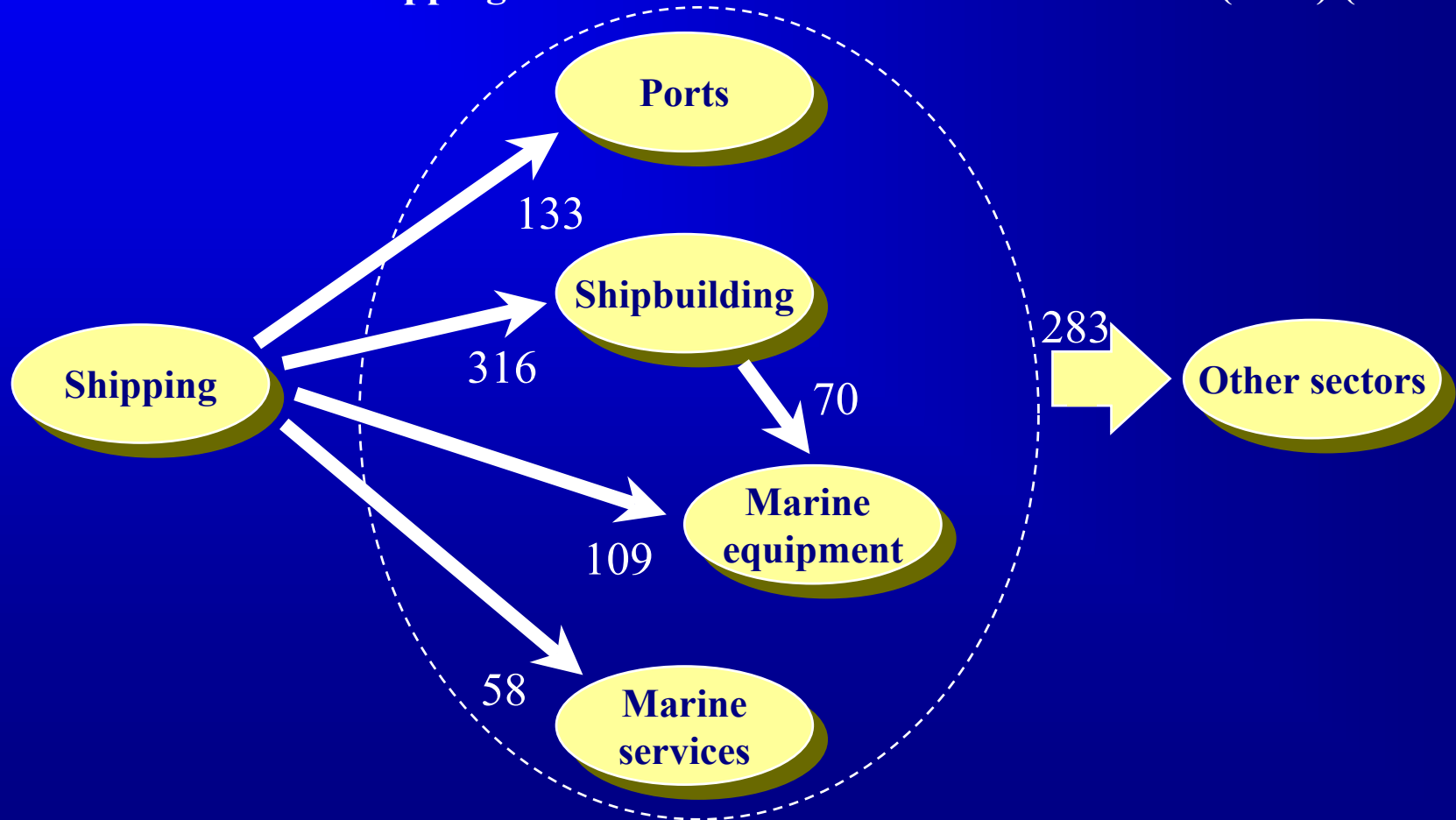


Real evolution since implementation (1996 -> 1999)

- Ships: + 200 ships
- Value added: + 17%
- Employment: + 17%

The demand-generating role of shipping and shipbuilding

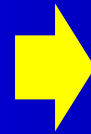
Purchases of the Dutch shipping sector at other Dutch maritime sectors (1997) (mln EUR)



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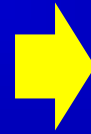
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- competitive shipping sector
- missing or conflicting data result in underestimation of cluster's economic importance

European Union + Norway

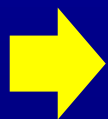
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➔ EIS[®] facilitates policy or strategic decision processes

Knowledge of identity is basis to initiate process for reinforcement of maritime cluster

- Maritime Cluster Organisation (e.g. Dutch Maritime Network)
 - does not replace existing professional sector associations
 - develops and initiates actions for reinforcement and promotion of the maritime cluster
- Maritime Industries Forum (MIF)
 - puts together maritime actors in order to discuss common problems and find common solutions
 - may need new ‘schwung’ in order to address the challenges that European maritime cluster currently faces



Private Public Partnership is key success factor in reinforcement process of the maritime cluster



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Jan Moorkensstraat 68

B-2600 Antwerpen

Belgium

Tel: +32 3 286 94 94

Fax: +32 3 286 94 96

info@policyresearch.be

www.policyresearch.be

Policy Research Corporation Nederland B.V.

Parklaan 40

NL-3016 BC Rotterdam

The Netherlands

Tel: +31 10 436 0 364

Fax: +31 10 436 1 416

info@policyresearch.nl

www.policyresearch.nl