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**IndustriALL Global Union  
Shipbuilding-shipbreaking Action Group Meeting**

**7-8 November 2016  
Mandurah, Western Australia**

# DUTCH TRADE UNION CONFEDERATION



- FNV 1,2 miljoen million members
- 180 Collective Labour Agreements



- 8 Sectors with a Collective Labour Agreement
- 650.000 workers
- 130.000 members

# DUTCH MARITIME INDUSTRIE

- Turnover : € 7.5 billion in 2014  
to € 8.2 billion in 2015.
- work for 31,000 FTEs.



# SHIPBUILDING 2015

- 2015 63 Sea-going vessels (2014:67).
- order intake was 64 ships (2014:99 ships) with a value of € 693 million (2014: € 1 billion).
- 83% came on behalf of export orders (2014:80%).
- The turnover of the yards amounted to € 5.0 billion (2014: € 4.6 billion).



# SHIPBUILDING 2015

- Approximately 670 Dutch maritime suppliers, amounted to € 4.2 billion in 2015 (2014:3.8 billion €).
- Shiprepair revenue amounted to € 637 million in 2015 (2014: € 558 million)
- Inland vessels, fisheries and small seagoing vessels 128 ships In 2015 (2014: 108 ships)



# SHIPBUILDING 2015

- Super yachts
- 23 super yachts (2014: 22)  
value of € 1.1 billion (2014: € 649 million)  
28 new commands are listed

The order book at the end of December was 72 super yachts (2014: 70 super yachts) with a value of over € 4.2 billion (2014: 4.1 billion €).





# SCHIPBUILDING 2016

- 2015 Royal IHC, lay off 1600 workers (487 permanent positions and 1127 temporary jobs). 2016 another 425 people lost their jobs. (White collars)
  - Keppel Verolme, lay off 100 workers
  - Heerema, 350 lay offs . ( $\frac{3}{4}$  of the population will cut off).
  - Suppliers minus 150 probably more
- No work in the Dredgers and Offshore Industries





# SHIPBUILDING 2016

- Shiprepair  
Continuous stable
- Inland vessels, fisheries and small seagoing vessels  
Difficult and shrinking
- Naval  
Shot to pieces, ferry small market
- Super yachts  
Super (orders until 2020)



# RECOVERY IN 2018

- 586 ships worldwide in 2016 were ordered. That number takes this year to 790.
- Orders rising to 1300 in 2018. Also for later years. (On average over the last 20 years were ordered some 2200, indicates how strong the order flow now has fallen back.)

International shipbuilding sector once again a difficult year. Dutch shipbuilders in deep shit!



# THREATS AND OPPORTUNITIES

- Outsourcing
- Cheap workers from OEM
- New vessel concepts in offshore wind
- Damen Expedition Cruise Vessel
- Naval orders
- Shipbreaking
- Transformation to a Dutch Shipbuilding Museum !!



# EU SHIPRECYCLING 1257/2013



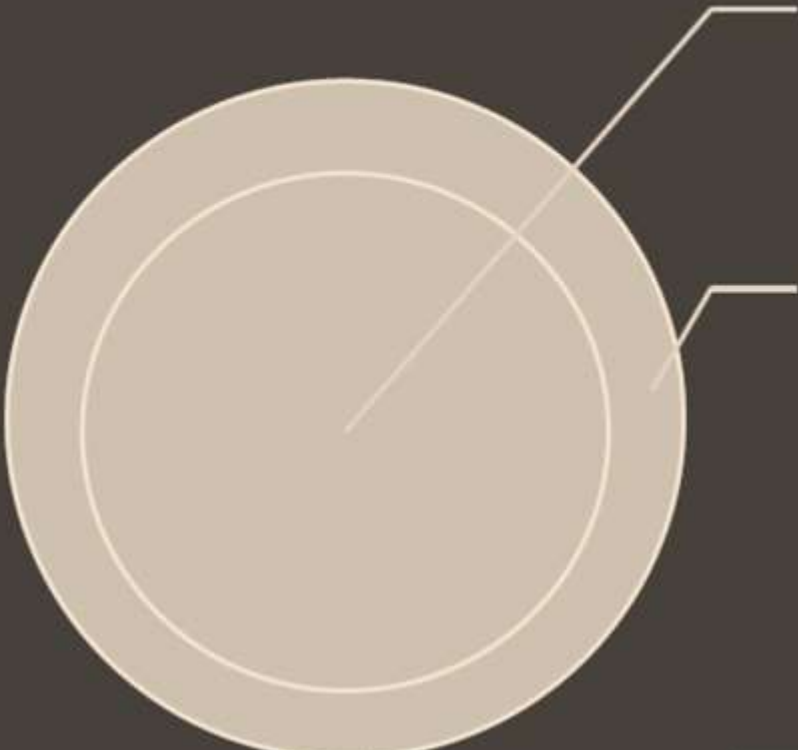
nothing about working conditions !!!

## What are the additional environmental requirements in the EU SRR compared to HKC ?

- Control of any leakage, in particular in intertidal zones
- Handle HM and waste only on impermeable floors with effective drainage systems
- Operate from built structures
- Standards for downstream waste management



## The Hong Kong Convention and the EU Regulation



At the core of the EU Regulation: the HKC & HKC guidelines

In addition: environmental requirements, EU List of approved facilities

# EY OBJECTIVES HKC & EU SRR

1. To reduce or replace hazardous materials.
2. To accurately provide an Inventory of Hazardous Materials.
3. To make the ship easy to dismantle (environmental friendly) .

**Working conditions is a yard responsibility!!**



# FNV WORKINGPLAN SHIPBREAKING

- SHIPBREAKING MAPPING SOUTH ASIA  
FNV (Wilma Roos) and Prabhu Rajendran, October 2016  
Objectives:
  - Shipbreaking and recycling sector in economic perspective
  - Institutional aspects: different stakeholders
  - Future development and prospects
  - National level in India, Bangladesh and Pakistan
- Support Industrial, SEWA and OSHE in regional and national project in I,P,B: workshops, organising, OHS, Social dialogue



# Questions ?

No questions?

# Thank you for !

