Netherlands trade mission to Poland

13 - 15 June 2022



Netherlands

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Foreword



Poland and the Netherlands both face the challenge of ensuring the success of the energy transition. The war in Ukraine makes that transition all the more urgent. Offshore wind has a major role to play and we have been impressed by Poland's preparations for boosting its development. These preparations include legislation that designates 11

areas of the Baltic Sea for the construction of offshore wind farms, delivering 6GW of offshore wind capacity by 2030 and as much as 11GW by 2040.

The Netherlands has gained a great deal of experience in wind energy in recent years, discovering in practice what works and what does not. We would be delighted to share that experience with Poland. The energy transition and security of supply require a joint effort between public and private sector partners and between EU member states.

Dutch companies in the offshore wind sector are engaged all over the world in developing and maintaining offshore wind farms. Their activities include offshore installations & transport, maintenance, engineering, port infrastructure & logistics, ecology, and training and development. They are eager to work with partners in Poland to contribute to the country's development of offshore wind.

It is an honour to have the opportunity to lead this offshore wind mission to Serock. I am delighted that the Minister for Climate and Energy Policy, Rob Jetten, will be attending the Polish Wind and Energy Association Conference and participating in various parts of the programme.

Let us work together – in Poland and the Netherlands, in the public and private sectors – to demonstrate that offshore wind works.

I wish you a productive and enjoyable visit to Serock.

Merei Wagenaar

Deputy Director, International Enterprise Department Directorate-General for Foreign Economic Relations (DGBEB) Ministry of Foreign Affairs

Map of the Netherlands

Locations

1. Amsterdam (and Airport Schiphol)

- 2. Arnhem
- 3. Assen
- 4. Breda
- 5. 's Hertogenbosch
- 6. Eindhoven
- 7. Enschede
- 8. Groningen

- 9. Haarlem
- 10. The Hague
- 11. Leeuwarden
- 12. Lelystad
- 13. Maastricht
- 14. Middelburg
- 15. Rotterdam
- 16. Utrecht
- 17. Zwolle



Introducing the Netherlands

How do the Dutch make a difference?

Through their interactive approach to finding innovative solutions to the big challenges facing the world today. The Dutch way of thinking and working has been shaped by centuries of living in the low-lying delta of the Netherlands. Through the ages, the Dutch have joined forces to find ingenious ways to tackle challenges like water, urbanisation, energy, food, health and security. By being inventive, pragmatic and open to new challenges, the Dutch have created a flourishing and resilient land.

The Netherlands is a constantly evolving ecosystem of cities, industry, agriculture and nature, all integrated through smart infrastructure. It is a source of knowledge and experience that the Dutch are keen to share with others. Learning from the past to create a better future. Together, seeking sustainable solutions for the most liveable world.



Worldwide ranking

- 1st At WEF's ranking of most competitive economies in Europe. 4th in the world. (WEF, 2019)
- 1st Production and auctioning of cut flowers and flower bulbs
- 1st World's largest flower exporter
- 2nd Largest exporter of agricultural products in the world (WTO, 2019)
- 4th Best at Global Innovation Index (GII, 2019)
- 5th Greatest place to live (World Happiness Report, 2019)
- 6th Largest exporter of goods in the world (CIA World Factbook, 2019)
- 7th Largest foreign investor in the world (1,256 billion US dollars)
- 7th Largest recipient of foreign investment in the world (801 billion US dollars)
- 8th Largest importer of goods in the world (507 billion US dollars)

Facts & Figures

- Official name Kingdom of the Netherlands
- Form of government Parliamentary democracy (cabinet of Prime Minister and Ministers) within a constitutional monarchy
- Head of State His Majesty King Willem-Alexander, King of the Netherlands, Prince of Orange-Nassau
- Capital Amsterdam
- Seat of government The Hague
- Administrative structure The kingdom consists of four entities. The Netherlands and three territories in the Caribbean: Aruba and Curaçao and St. Maarten. Number of provinces 12. Special municipalities: The overseas islands of Bonaire, Saba and St. Eustatius, all three of which are situated in the Caribbean.
- Surface area 41.543 km2
- Location Western Europe, by the North Sea, bordering Belgium and Germany
- Number of inhabitants 17.4 million (2021)
- Number of inhabitants per km2 517 (2021)
- Monetary Unit Euro
- Languages Dutch and Frisian (On the overseas islands also English and Papiaments)
- GDP per capita 51,064 euros (World Bank, 2020)
- Unemployment rate 3,1% (CBS, 2021)
- 90% of all Dutch people speak English

Poland and the Netherlands

Creating clean energy together

The economic ties between Poland and the Netherlands are booming. Exports and investments between the two countries are also rapidly growing. And that is not without reason.

Together, we face the same challenges: growing mobility, CO2 emissions and climate change driving the transition to the use of renewable energy - made even more urgent by recent geopolitical developments. Across these areas, the Netherlands is cooperating closely with Polish organisations, the Polish government and our Polish partners. With Poland seeking to develop their offshore wind value chain, the Netherlands can support their mission through knowledge and expertise exchange.

Opportunities for Poland

Poland is still heavily dependent on coal. But like many other EU members, needs to make a major effort in the energy transition. In turn, renewable energy production needs to increase significantly in the coming years.





For Poland, one of the largest opportunities in the energy transition lies in the development of wind energy on the Baltic Sea. Poland aims to develop almost 6 GW (gigawatts) of offshore wind capacity by 2030. By 2040, this will reach around 11 GW. Experts believe it could even reach as high as 28 GW.

With ambitious plans to contribute to the European goal, Poland and the Netherlands move forward to reinforce their positions to boost offshore wind energy. Both countries are strategically located by the North Sea and Baltic Sea coasts, with favourable conditions to construct offshore wind farms. This makes their goals for energy neutrality in 2050 more than feasible.

Discovering offshore wind solutions together

The Netherlands is strongly committed to achieving international climate agreements, but we know we can't do it alone. International collaboration and strong partnerships are key in moving to a more sustainable future. Offshore wind is one of the many prospects within our reach. Not only does it contribute massively to the energy transition, it also offers promising economic growth and employment opportunities.

Years ago, it was through government subsidies that Dutch wind farms could first flourish. Within just a few years, through cost reduction and efficiency improvement, the industry no longer relies on government funding. By 2050, all energy produced in the Netherlands will come from renewable sources. Already by 2030, a staggering 11.5 GW of energy is predicted to come from offshore wind farms – 40% of the country's domestic energy consumption.





The Netherlands has a 400-kilometre coastline with relatively shallow waters and a strong maritime sector, creating perfect conditions to develop offshore wind innovations. A small coastline doesn't mean small results. The Netherlands already generates a quarter of Europe's offshore wind capacity. With our proven experience in marine engineering and offshore wind installation, technology and expertise developed in the Netherlands is in demand for developing offshore wind farms all over the world.

With Poland looking at offshore wind energy as a means to accelerate its transition to the use of cleaner energy, the Netherlands can be a valuable partner for sharing its experience thus far.

The Netherlands is keen to offer expertise and guidance in:

- · offshore installation & transport;
- maintenance;
- · engineering;
- · port infrastructure & logistics;
- · ecology;
- and training & education.

Ensuring that every wind farm has a safe and sustainable future requires dedicated teamwork, collaboration and innovation, all across the board. We are keen to share our knowledge with others to move towards sustainable energy production. Let's work together to harness the full potential of offshore wind energy and show the world that wind energy works.

wind & water works

Wind & water works

For the Dutch, working at sea is in the blood. For centuries, our companies have worked offshore gaining a deep understanding of the specific conditions above and below sea level that can make or break a project. That experience means the Netherlands is home to some of most successful and innovative offshore wind businesses, maritime companies, and research institutes in the world. Our supply chain is a strong one with global reach and it's here to help you develop your own offshore wind industry with confidence.

In the Netherlands, the Government has taken on the task of developing offshore wind energy in the Dutch North Sea itself. It has introduced a stable policy environment with clear project pipelines. There are flexible rules and regulations in place. High quality site data is provided by the Netherlands Enterprise Agency to prospective developers of designated wind farm sites. Transmission system operator, TenneT, is responsible for all grid connection infrastructure. Meantime, Rijkswaterstaat grants consents for wind farm sites and monitors environmental impact. This approach provides greater certainty for developers, increases investor confidence, and has been proven to foster innovation and drive down overall costs for offshore wind projects.

Combined, this array of Dutch private and public sector expertise can provide international neighbours with the right solutions for offshore wind in different site conditions around the world. We have proven experience working in the global wind industry to support its growth in a proactive, sustainable, and successful way and we are willing to share the lessons learned. Through the wind & water works gateway, our aim is to share this expertise and forge strong international partnerships to ensure the successful development of the offshore wind sector around the world. We are ready, willing, and able to work with you, so let's connect to maximise the full global potential of offshore wind.

Company profiles

Offshore wind energy Partners



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Bonn & Mees Floating Sheerlegs

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Bonn & Mees Floating Sheerlegs

Bonn & Mees owns and operate a fleet of 3 seaworthy sheerlegs, with a lifting capacity from 400 up to 1.800 tons.

Bonn & Mees offer their clients a focused service, 24 hours a day and 365 days a year.

The employment of Bonn & Mees guarantees safety expertise, flexibility, creativity and quality. We are closely and continuously following marketand technical developments to ensure a professional answer for the requirements of our clients.

Our equipment is very well maintained and certified according to the latest standards of the (offshore) market.

With our inhouse engineering department we guarantee you a safe and efficient solution for each heavy lift project.

Our experienced engineering department has both the theoretical as well as the practical know-how and all the software needed to prepare your project in the smallest detail.

Over the last years we have gained a lot of experience in the wind industry, such as handling of TP's, monopiles and other wind-industry related items.

☆ ▶ Boskalis



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Boskalis Offshore

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Boskalis Offshore

We are Boskalis and we create new horizons for our stakeholders. As a leading global dredging contractor and marine services provider, we offer a unique combination of experts, vessels and services. Maintaining the highest safety and sustainability standards, we deliver innovative and competitive allround solutions to our clients.

In the international offshore energy sector we offer an unparalleled range of specialist services as either a service provider or a lump sum contractor bearing risk for the execution of projects requiring our services.

Offshore wind projects from A to Z

Within the offshore wind industry Boskalis has a successful track record in providing services throughout every phase of a project. We perform geophysical and geotechnical surveys of the seabed, and locate, identify and remove any unexploded ordnance before installing foundations and converter stations. We take responsibility for the procurement of offshore wind turbine foundations and manage the logistical process from the fabrication yard through to the offshore installation for both floating and fixed offshore wind farms. We procure, install and bury export and array cables, and install subsea rock to protect cables and prevent scour damage to offshore foundations. Once the wind farm is operational, we offer long-term subsea inspection, repair and maintenance services (IRM). With our knowledge and experience in the removal of offshore structures we are well positioned to remove offshore wind turbines and cables after their useful life.





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V

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Broekman Logistics

Broekman Logistics is a full service logistics organization specializing in ocean, road, rail, air and multimodal transport. Broekman Logistics has its headquarters in Rotterdam, the Netherlands. We offer Value Added Logistics (VAL) and Value Added Services (VAS), such as warehousing and door-to-door distribution, on a worldwide basis. We specialize in processing and storing complex, heavy or dangerous products and transporting them in the most efficient way.

Broekman Logistics provides global logistics service solutions through international offices in the world. Our own offices are located in Western and Central Europe, South and East Asia. Our offices around the world work together intensively. Over the years we have built an extensive network of partners and agents throughout the globe. Our aim is to support our customers in every way as a reliable logistics partner.

Broekman logistics offers the following scopes:

- air freight imports
- · sea freight imports
- · air freight exports
- · sea freight exports
- · air-sea transportation
- · sea-air transportation
- customs clearance
- door-to-door distribution
- · warehousing facilities







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CORROSION

CORROSION protects vessels, offshore wind turbines and onshore applications against fouling and corrosion. CORROSION is market leader in protecting wind turbine foundations in an environmentally friendly way by using ICCP. Since 2007 CORROSION protected over 2.400 foundations and installed over 3.100+ systems.



CORROSION

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Damen Shipyards Group

Damen Shipyards Group has been in operation for over ninety years and offers maritime solutions worldwide, through design, construction, conversion and repair of ships and ship components. By integrating systems we create innovative, high quality platforms, which provide our customers with maximum added value.

Our core values are fellowship, craftsmanship, entrepreneurship and stewardship. Our goal is to become the world's most sustainable shipbuilder, via digitalisation, standardisation and serial construction of our vessels.

Damen operates 35 shipyards and 20 other companies in 20 countries, supported by a worldwide sales and service network. Damen Shipyards Group offers direct employment to more than 12,000 people.

in

Damen Shipyards Group

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Deep, Hydrography & Geophysics

DEEP is a survey company founded in 1999 and based in Amsterdam, The Netherlands, specialising in hydrography and marine geophysics.

We safely operate our own fleet of offshore and nearshore vessels equipped with cutting-edge marine geophysical equipment and working according to stringent ISO accredited procedures. DEEP's seabed data deliverables are known for their quality and all the credit goes to DEEP's staff, a tight-knit group of 80+ professionals who are highly motivated to make the most of every project for every client simply because they love their job!

DEEP provides the following services in offshore areas, coastal zones, seaports and inshore waterways worldwide:

- Hydrographic Surveys
- · Marine Geophysical Site Investigations
- · Cable Pre- and Post-Installation Surveys
- Subsea Cable Depth of Burial Surveys
- UXO Detection Surveys
- Marine Archaeological Surveys
- Benthic Habitat Mapping
- Precise surface and Sub-Surface Offshore
 Positioning
- Oceanographic and Meteorological Measurements



Deep, Hydrography & Geophysics

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Dredging and Contracting Rotterdam, part of Jan De Nul Group

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Dredging & Contracting Rotterdam

Jan De Nul Group is a family-owned company with its roots in Belgium focusing on five activities: offshore energy, dredging & maritime construction, civil construction, environmental activities and project development. For the construction of Offshore Wind farms we have the knowledge, knowhow and assets to construct each and every offshore and nearshore aspect. Starting with the installation of foundations, followed by the transport of export and inter-array cables and protection of both the foundations and cables, to finish with the installation of wind turbines and offshore substations. Our talented people develop solutions that contribute to the energy transition from design and engineering up to execution of any such scope.

With our extensive experience within the Offshore Wind industry in Europe, Asia and the USA, we are able and capable to utilise our state-of-the-art vessels to its maximum capacity and capabilities.

With a clear focus on offshore energy projects, Jan De Nul is strategically investing in its specialised fleet. In spring 2019, the Jack-Up Installation Vessel Voltaire was ordered, followed by the ordering of the Heavy Lift Vessel Les Alizés in autumn 2019. Furthermore, the Cable Lay Vessel Connector has been acquired by the group from a third party in 2020.







Cees Noordhoek COO +31 6 1036 9925 cees@ducmarinegroup.com

DUC Marine Group

DUC Marine Group provides subsea (diving, ROV, survey) and marine services to the offshore wind, subsea power & communication cables, oil & gas, and inshore civil construction industry. Diving, ROV, survey, CFE, inspection, repair, and maintenance services from 4-point mooring, spuds and/or DP support vessels. We never rely on a "one size fits all" approach. DUC Marine Group is proud to be recognized by numerous companies to achieve the 'impossible' in challenging situations through our innovative approach combined with a very proactive attitude.



DUC Marine Group

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EAGLE-ACCESS

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EAGLE-ACCESS

With the EAGLE-ACCESS system it is not a challenge to transferring people and cargo in complete safety to offshore platforms; EAGLE-ACCESS is a fully balanced and electrically driven access system, a real game changer.

The EAGLE-ACCESS system is developed in accordance to the latest requirements of the industry. A single system for transfers and at the same time being suitable for deck handling, being compact, lightweight and easy-to-use. Transfers with EAGLE-ACCESS are safe, reliable and cost-efficient, also due to the fact no specially trained operators are needed. The crane operator in service takes care of the transfers, after having a short training at EAGLE-ACCESS academy. Which results in the advantage there is no need for extra cabin space.

EAGLE-ACCESS promises you a true return on investment, with expanding the scope of your operations with fast and flexible transfers, safe and efficiently performed by the vessel's crane operator. During calm or severe weather conditions, it is the vessel that determines the limits. Another advantage, transfers performed by EAGLE-ACCESS absolutely no adjustments to the offshore installation are needed.

Our mission is to increase safety for offshore access and offshore transfers, significantly reducing costs and environmental impacts.

EAGLE-ACCESS, now that's Walk to Work!





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INTRAMAR insurances

INTRAMAR insurances has been advising companies active in the offshore energy industry since 1994.

The basic principle here is always that risks should be limited up front:

it is in the interest of every company that contractual liabilities are limited as much. Residual risks can then be insured.

This includes all forms of liability insurance:

- · General liability
- · Professional liability
- · Employers' liability
- · Products liability
- Pollution liability

Insurance cover for personnel:

- Business travel insurance, incl. off/onshore evacuation costs cover
- Accident insurance
- Expatriates insurance

Insurance cover for assets:

- Equipment, machinery, etc.
- · Vessels: hull & machinery, P and I

Marine transit: transport of equipment, etc.



INTRAMAR insurances

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IQIP

IQIP is the worldwide leading foundation and installation specialist. We have been offering total solutions for construction projects in the Offshore Wind, Civil and Oil & Gas market, as well as Decommissioning, for over 30 years.

Building for tomorrow requires efficient and environmentally friendly installation and foundation methods. To realise these projects, you need a partner with experience, an innovative approach and high-quality equipment. That partner is IQIP.

We help our customers from start to finish with advice, engineering, equipment and implementation.



IHC IQIP

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Orga

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Orga

Orga is the trusted partner of choice when it comes to protecting people, assets and the environment. Since 1973, Orga has been delivering high-quality and efficient solutions for marking assets and landing areas to guarantee safe operations. Orga develops and manufactures smart offshore and onshore obstruction marking for wind turbines, high-rise buildings and telecom towers, Circle-H helideck lighting, aids to navigation and power supply systems. A comprehensive range of services and support capabilities is also provided.

We have an in-depth understanding of local and international regulatory code requirements and are conscientious and committed to achieving our customers' goals and exceeding their expectations. Orga's in-house researchers and product developers focus on quality and innovation and work continuously to improve and expand the company's product portfolio.

With approximately 200 employees, Orga is a global operation with offices in the Netherlands, the United Kingdom, Denmark, Spain, Dubai, Singapore, Malaysia and Brazil. We also work with international partners and agencies to deliver our solutions to customers all over the world.





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RelyOn Nutec

RelyOn Nutec is the worlds leading provider of GWO approved safety training for the on- and offshore wind industries. From 34 locations in 20 countries we ensure that the offshore workforce is equipped with the skills and competences to return home safely.

In Central Europe these locations currently include Bremerhaven, Amsterdam, Rotterdam, Oostende and from January 2023 Eemshaven.

Further to safety training we assist companies with digital solutions to help manage competencies and certifications, as well as e-learning and simulators.

RelyOn Nutec is aiming to enter the Polish Offshore Wind market in the coming years and is actively looking for local partnerships in the form of maritime academies or universities, existing training providers, or onshore wind service providers.



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Shell

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Shell

Shell is an international energy company with 82,000 employees and operations in more than 70 countries, with expertise in the exploration, production, refining and marketing of oil and natural gas, and the manufacturing and marketing of chemicals.

We use advanced technologies and take an innovative approach to help build a sustainable energy future. Shell is a customer-focused organisation, serving more than 1 million commercial and industrial customers, and around 32 million customers at 46,000 retail service stations daily.

Our strategy is to accelerate the transition of our business to net-zero emissions, purposefully and profitably. Shell's Renewables & Energy Solutions business is part of this transformation. We are working to provide more renewable and low-carbon energy options for customers through investments in wind, solar, electric vehicle charging, hydrogen, and more.

In Poland, Shell has been present for over 30 years, currently employing 5,000 people. Our presence spans the Mobility business, where we operate 430 service stations including IONITY fast chargers for electric vehicles and LNG stations, which are part of the European LNG corridor from Spain to Poland. Shell's operations in Poland also include Lubricants and Commercial Fleet businesses as well as one of the largest business operations centers supporting 12 different Shell global businesses and functions.





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TOS | People & Ship Delivery TOS Netherlands

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TOS | People & Ship Delivery

We are TOS. A family business. Loyal and authentic. Founded in 1992 in Rotterdam. We proactively support clients in finding flexible workforce and effective personnel solutions around the world. We supply the very best people for our clients in the maritime, onshore, offshore & wind energy sector. In our characteristic, personal and professional way.

TOS | People & Ship Delivery

- Nautical Crew: Officers, Engineers, AB's and Catering
- Construction Crew: Foremen, Riggers, Gangway
 Operators, Electricians and Crane Operators
- Maintenance Crew: E&I Technicians, Turbine Technicians and Mechanics
- Supervisors: Lifting and Offshore construction
- Project Staffing
- Turnkey Ship Delivery

Flexible project teams

In recent years TOS specialised in providing construction and maintenance teams for the offshore wind installation and decommissioning projects in the North Sea, German Bight and Asia. These teams are used to working together and are trained according to the highest industry standards. We take care of the recruitment & selection, training and planning of these teams which we do in close cooperation with our clients. By outsourcing these HR services to TOS, our clients have a flexible and cost- efficient solution for their project teams.

Contact

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Van Oord DMC

Van Oord Dredging DMC is a worldwide operating dredging and marine contractor with a modern fleet of dredging and construction vessels specialised in:

- Dredging and land reclamation works
- · Construction of energy islands
- · Coastal protection works and beach nourishments
- Port construction
- Maintenance dredging
- Breakwater construction
- Slope and bottom protection works
- Outfall installation works

Van Oord DMC has recently finished the Swinoujscie-Szczecin Fairway deepening project in Poland. The project included the removal of 24 mill m3 of dredged material by deepening the channel by 2m to -12,5m and the creating 2 artificial nature islands. A big challenge was the clearance of the large number of unexploded ordnances encountered during the dredging operations.

in

Van Oord DMC

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Van Oord Offshore Wind

Van Oord has long been a pioneer in the offshore energy transition, and we are now one of the market leaders. Since initially becoming involved in an offshore wind farm in 2002, Van Oord has expanded its portfolio considerably. Across all our offshore wind projects, our activities range from developing projects, transporting and installing main components to delivering balance of plant projects, including engineering, procurement and construction of fully renewable energy wind farms.

Van Oord has contributed to a total installed renewable energy capacity of almost 16GW. Additionally Van Oord has a significant track record in the installation of offshore wind farms in the Baltic Sea.

in

Van Oord Offshore Wind

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Netherlands-Polish Chamber of Commerce

The number one goal of the Netherlands-Polish Chamber of Commerce is to help businesses of all sizes to grow and prosper. We offer our members exposure to the business community, a strong network base and opportunities for professional development. The Netherlands-Polish Chamber of Commerce is one of the private partners of this trade mission.

Netherlands-Polish Chamber of Commerce

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Netherlands Wind Energy Association (NWEA)

The Netherlands Wind Energy Association (NWEA) is the wind energy sector's branch association. NWEA promotes the development of wind energy to achieve a sustainable energy supply, within the Netherlands and abroad. Together with, and on behalf of its members, NWEA is working on creating a robust wind energy sector, in combination with a new and relevant policy.

Official delegation & contact details

Ministry of Foreign Affairs

Ministry of Economic Affairs and Climate Policy | Netherlands Enterprise Agency

Embassy of the Kingdom of the Netherlands in Warsaw

Official delegation

Ministry of Foreign Affairs

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