



# It's a people business

TOS | Crewing and Ship Delivery

*Ivan Wagenaar – Commercial Director*

15<sup>TH</sup> JUNE 23





# Agenda

- Short introduction TOS
- The Crewing market
- Crewing challenges for Towage
- Solutions
- Future
- Conclusion



# TOS at a glance

TOS is a **family-owned** maritime services provider dedicated to delivering **flexible workforce solutions** worldwide. Our commitment to innovation, sustainability and safety ensures the best matches between clients and candidates. With a personal touch, we stand out for the highest quality of service.



Over **30 years** of  
people experience



**1,500 working**  
professionals



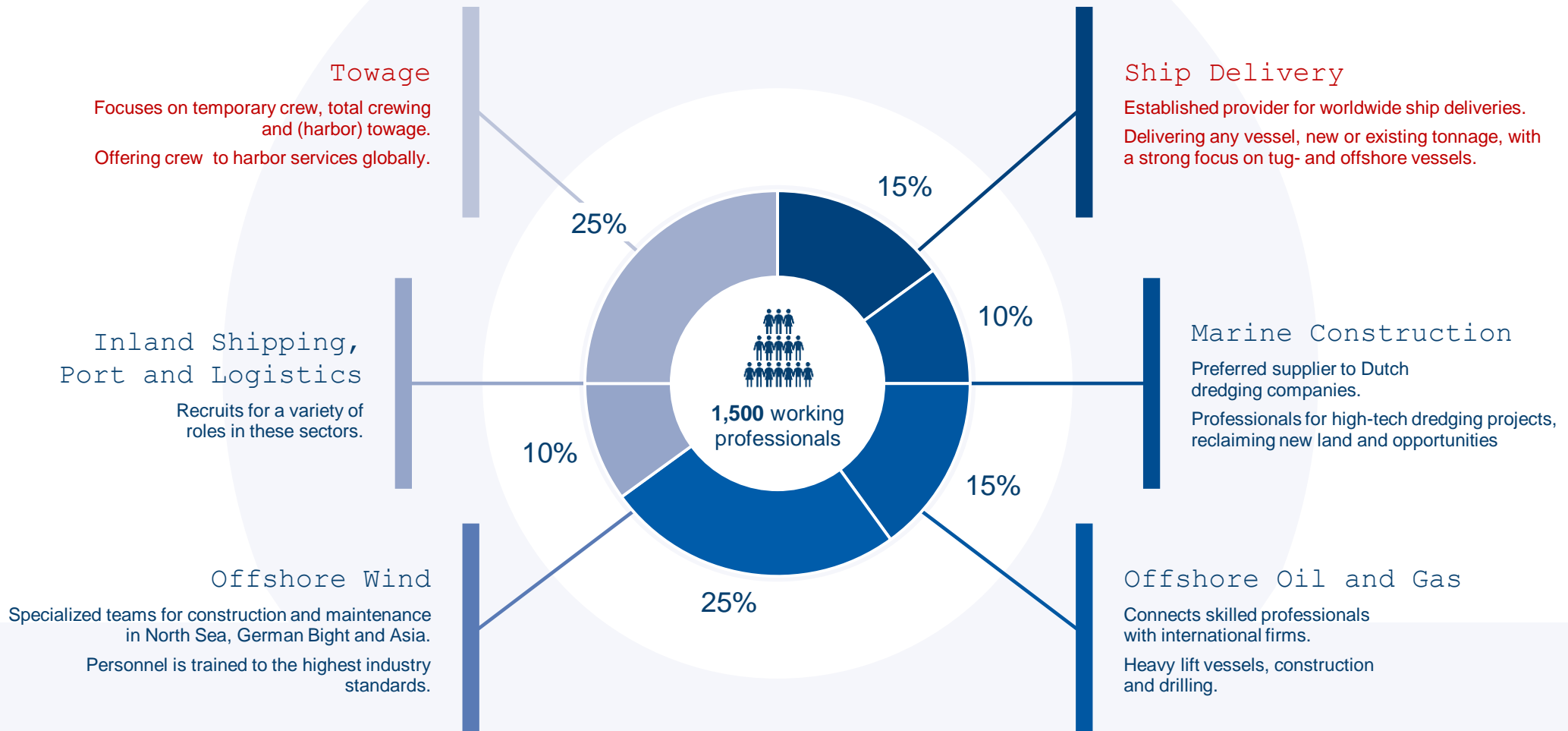
**8 offices** worldwide,  
HQ in Rotterdam



FTE  
**+130+**



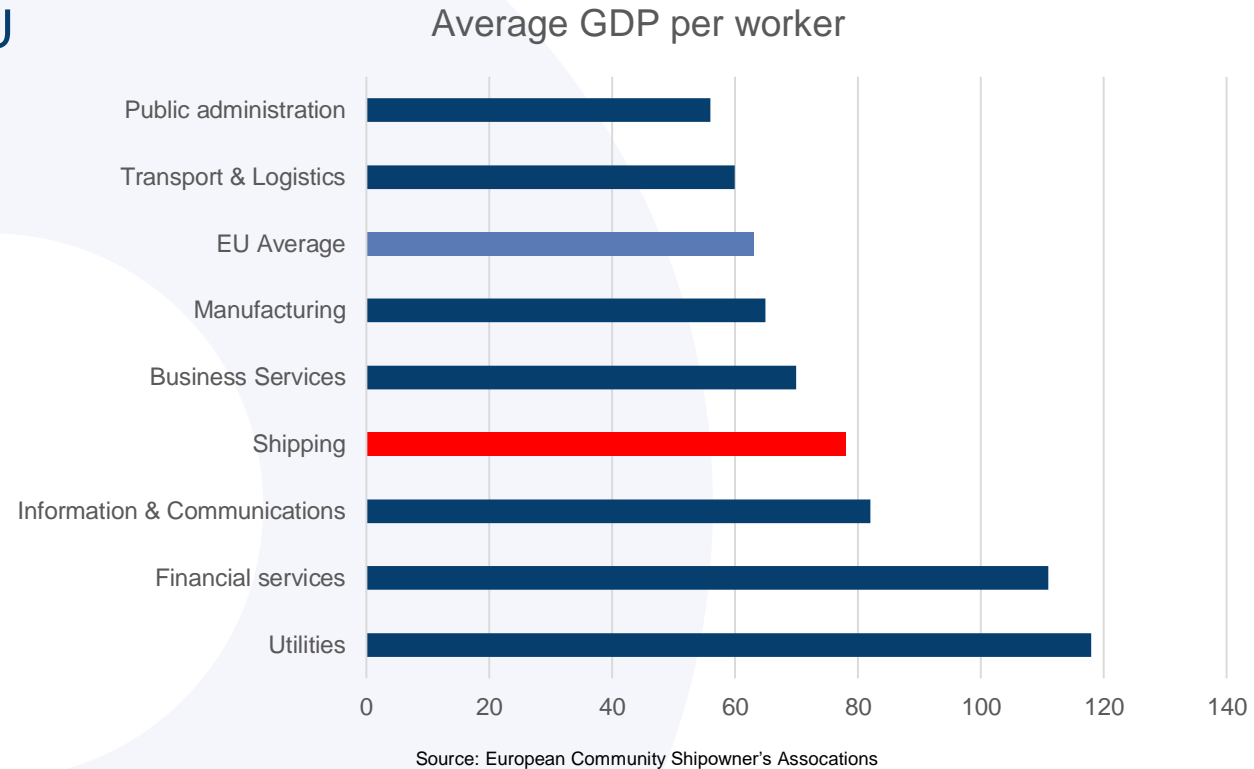
# We are active in various markets





# Employment in Shipping

- Shipping is an important employer within the EU
- 685.000 jobs (17% Shore based, 83% at Sea)
- Above average economic added value
  - €78k per worker in shipping
  - €63k average in Europe



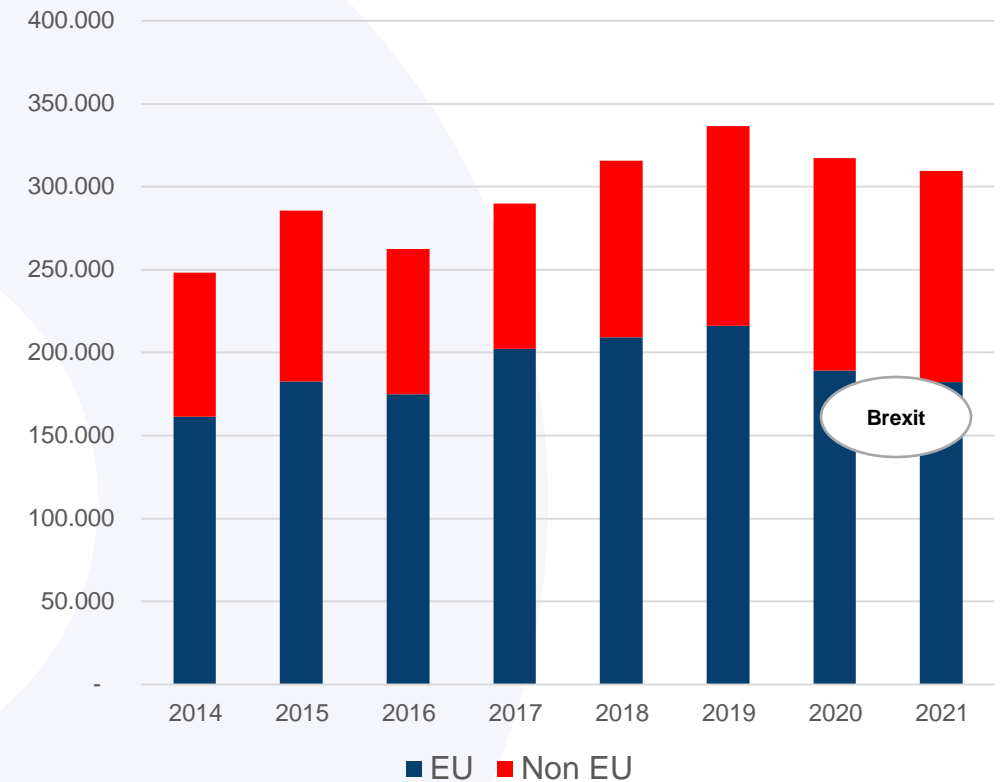
**Despite these economic numbers an increased shortage of Crew is noted**



# EU Crewing market

- Slow decline in number of European crews
- For EU harbour towage operators, non-EU crew not allowed to work in harbour towage

Number of Crews with European CoC

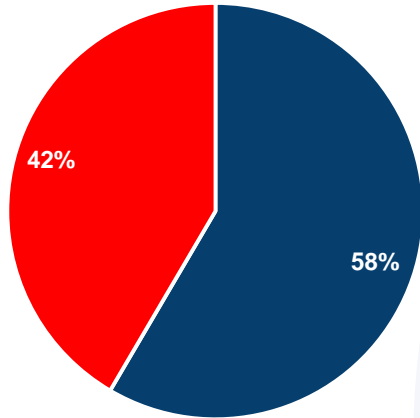


Source: European Maritime Safety Agency



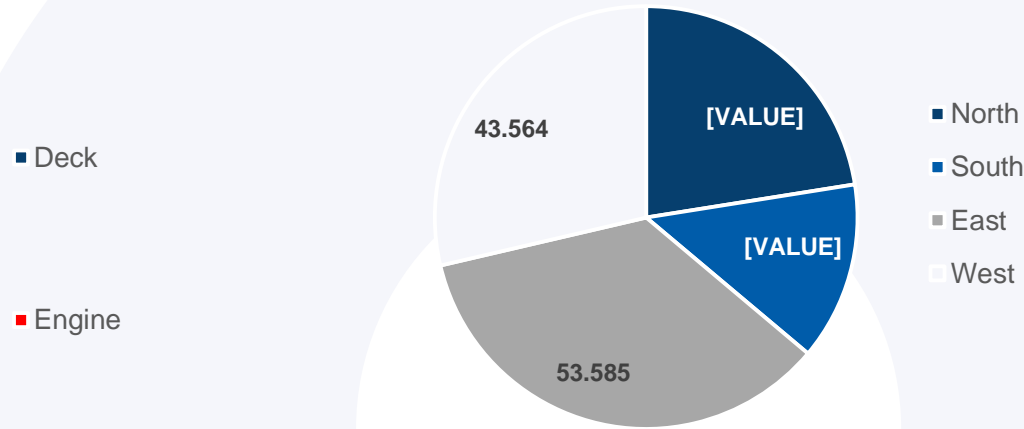
# EU Crewing market

Distribution between Deck and Engine

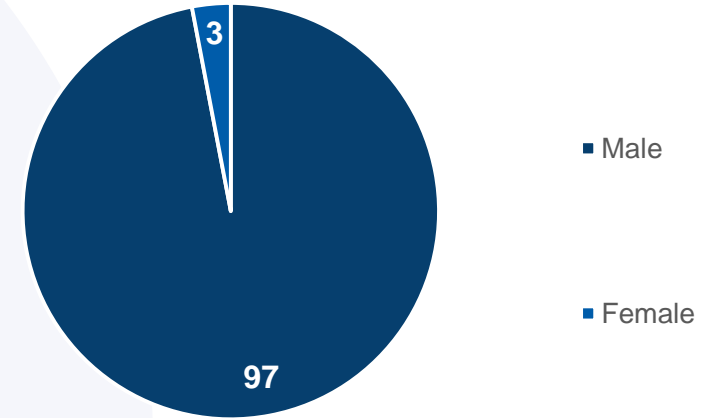


Source: European Maritime Safety Agency

Available crews per part of Europe



Gender of crews (%)



- Deck department vs. Engine department stable over time
- Distribution of available crews per EU country also stable over time
- Gender distribution unfortunately **very** stable over time as well

**So what are the main challenges?**



# General Crewing challenges

Crew with CoC

≠ Crew working on board of vessels

- *Competition with onshore jobs*
- *Rotation schedules / away from home*
- *Travelling abroad is less exciting than before*
- *Youth wants more flexibility in life*

EU crew

≠ Not only available for the European market

- *Competition with seafarers jobs around the world (just like soccer players)*
- *Outside EU typically lower taxation*

EU crew

≡ Relatively aged/aging crew

- *Attract new talent into the market becomes more and more challenging*
- *Availability will further decrease if no measures will be taken*

**Attractiveness to become a seafarer in Europe has declined over time**





# Crewing challenges for Towage

EU crew



Local crew

- *For harbour towage operations typically local crew is required*
  - o *Language barrier with Pilots*
  - o *Local work = local workers (inflexible labour laws, despite EU)*

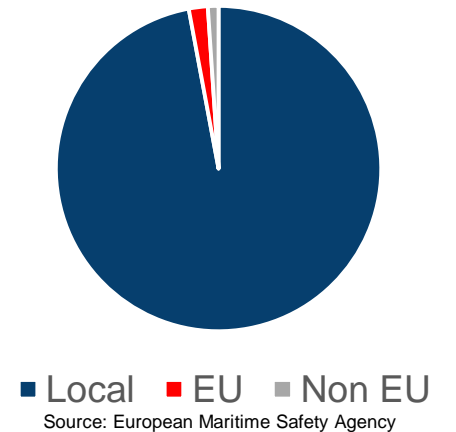
Tug boats



Any type of boat

- *Highly specialized skills needed, you don't learn it at school*
- *Relatively small vessel, extremely powerful and maneuverable*
- *Limited career perspectives (positions on board)*
- *Limited spaces/entertainment/free time*

Employment nationality in Towage





# Towage vs Offshore

Offshore



Major competitor for Crewing in towage

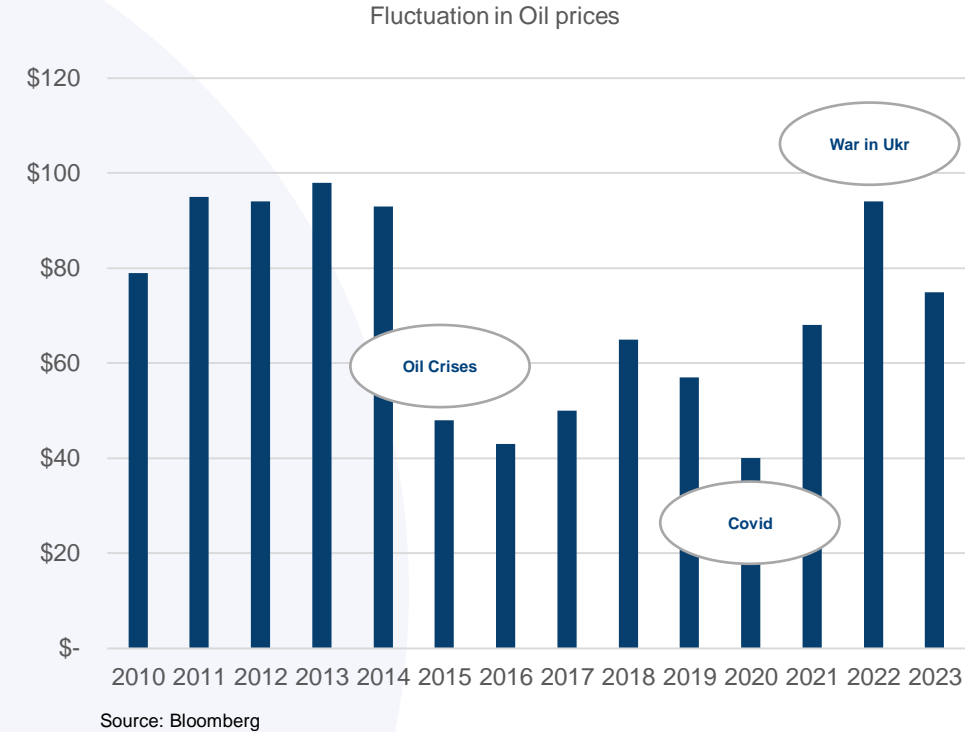
- *Larger vessels, more positions/career growth potential*
- *Modern vessels, luxurious accommodation and facilities*
- *Higher wages*
- *International work scope typically with lower taxation for crew*

Offshore



Large fluctuations in Offshore vessel utilization (and crews)

- *Unpredictable demand for crew*





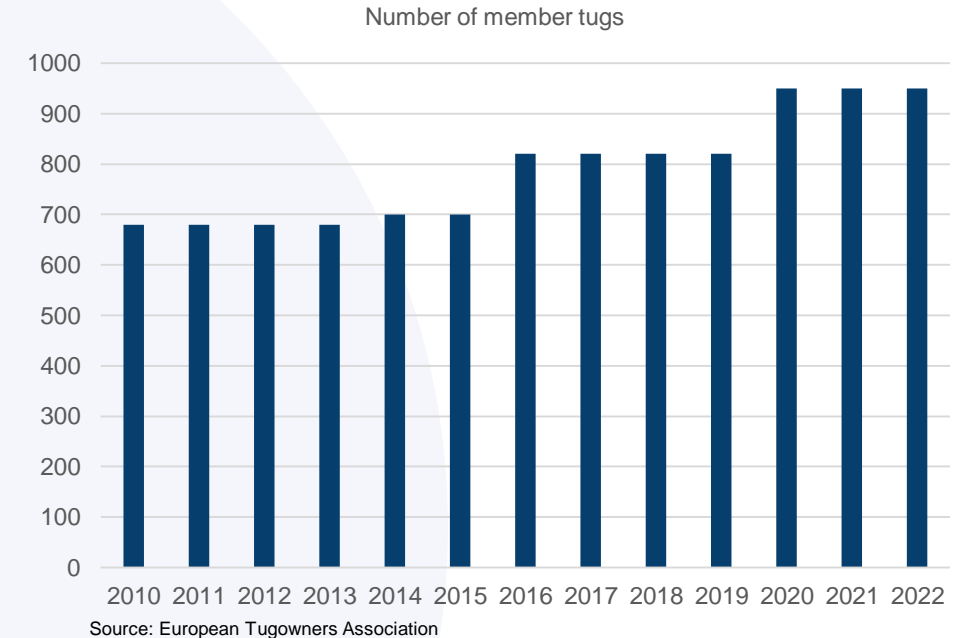
# Crewing challenges for Towage

# of Tugs



Increasing quite significantly

- *Minimum Safe manning did decrease over time*



**Last years it became a major challenge to find (local) crew for Towage operations**



# Solutions

## 1. Sell the benefits of working in Towage

- More stable industry and employment
- Limited travelling and being away work the family (shorter rotations)
- Specific work and skills, you can show-off
- Part of a close community



# Solutions

## 2. Make crewing a priority

- Given the challenges important to have a long-term plan for your crewing department
- Don't act too quickly on short term effects of availability of crew
- Small things on a Tug matter: Internet access, accommodation, catering
- Maximize engagement between crew and office, make them part of your internal organization



# Solutions

## 3. Gender Diversity

- Less than 3% of the current crew are women
- A lot of potential to unlock
  - o *How to increase the pipeline of female seafarers in general*
  - o *How to early engage with female talents and promote opportunities in towage*
- Create an equal working environment for male and female crew



# Solutions

## 4. Training

- Two target groups for training: Students and career changers (with CoC)
- Simulator training – use modern facilities to limit expensive time at sea (right balance)
- Academy – dedicated training facility for Towing in one place (maybe Rotterdam 😊)

**Make it a continuous project, don't stop when imminent needs are not there**



# Solutions

## 5. Regulatory changes

- Simplified AB license for working on Tugs (shortening the practical part)
- English speaking pilots, not immediately but we need to work towards it
- More options to employ non local crew, and even non-EU crew at one point





## Solutions

### 6. Work with TOS (or other specialized crew suppliers)

- They have the expertise and European infrastructure recruitment (payroll)
- Go for a long-term strategic partnership with your crewing agent, do not 'divide and conquer'
- Go for an international solution, select a Crewing partner with an international network



# Future challenges

## Electrification of Tugs

- Changes for Engineers
- Charging time might affect utilization, therefore rotation of crews

## Remote Controlled/Autonomous vessels

- Different skill sets needed from the crew



## Conclusion

- Shortages will only increase if no measures will be taken
- Important to prioritize crewing before it's too late
- Lobby with regulators and other stakeholders to make necessary changes
- Make this industry Instagrammable;-)



# Let's get to know each other

With confidence and enthusiasm, we actively build strong partnerships through our dedicated, personal, and proactive approach. Let us know how we can provide a tailored solution for your needs. We look forward to get in touch!



**Rolf Kievits**  
Sales Manager Ship Delivery

E: [r.kievits@tos.nl](mailto:r.kievits@tos.nl)

M: +31 6 53 86 10 48



**Achouak Jouahri**  
Sr. Business Manager Towage

E: [a.jouahri@tos.nl](mailto:a.jouahri@tos.nl)

M: +31 6 46 39 18 11



**Ivan Wagenaar**  
Commercial Director

E: [i.wagenaar@tos.nl](mailto:i.wagenaar@tos.nl)

M: +31 6 11 30 62 52