Published 2010
by **Culture Lab Editions**,
Elisabethlaan 4 B-3080 Tervuren
Belgium
www.culturelab.be

ISBN 978-2-9600527-7-0

Produced on behalf of Archaeology in Contemporary Europe: Professional Practices and Public Outreach.

Designed by Pascale Coulon

This publication has been produced with the support of the European Commission (through the Culture 2007-2013 programme) in the framework of the ACE project – "Archaeology in Contemporary Europe. Professional Practices and Public Outreach".

CULTURE LAB ÉDITIONS

Culture Programme

Education and Culture DG

archaeology in contemporary europe

Cover Photo: Archaeologists defending higher education, research and employment (Paris, January 2009, photo: Nathan Schlanger).

ARCHAEOLOGY AND THE GLOBAL ECONOMIC CRISIS

MULTIPLE IMPACTS, POSSIBLE SOLUTIONS

Edited by Nathan Schlanger
and Kenneth Aitchison

7. A crisis with many faces. The impact of the economic recession on Dutch archaeology

Monique H. van den Dries,
Karen E. Waugh
& Corien Bakker

Monique H. van den Dries,
Faculty of Archaeology,
Leiden University, Netherlands
m.h.van.den.Dries@arch.leidenuniv.nl

Karen E. Waugh,
Vestigia B.V. Archeologie & Cultuurhistorie,
Amersfoort, Netherlands
k.waugh@vestigia.nl

Corien Bakker,
Dienst Stadsbeheer, The Hague,
Netherlands
c.bakker@dsb.denhaag.nl

1 Introduction

In April 2008 the Netherlands officially declared itself to be in economic recession. It was estimated that the Dutch economy would suffer a decline of at least 4% or even 5% over 2009. The building sector in particular was affected. The inherent link between the construction industry and the archaeological sector meant that the sector began to prepare itself for hard times in 2009 and beyond, particularly where the amount of fieldwork and subsequent employment rates were concerned. With this in mind, the aim of this paper is to provide a general analysis of the effects of the economic crisis on the archaeological sector in 2009. During its preparation members of the commercial employers association VOIA were questioned as well as municipal archaeologists and developments in the number of field projects and jobs were monitored. Results show that the so-called crisis in Dutch archaeology had many faces, the situation being less straightforward than first predicted.

2 The economic situation

For 2009 the Netherlands Bureau for Economic Policy Analysis (CPB) estimated an economic decline of around 5% and a rise in the unemployment rate of 5%.[1] Industry and the building sector were targeted as being particularly affected.[2] The building sector experienced a 40% drop in demand for homes and other property development. Figures for June 2009 show hardly any jobs advertised within the large building companies. A research agency study for the building industry estimated a total reduction of 15% in the building market, combined with the loss of 50,000 jobs in the sector over 2009 and 2010: a total of 1 in 10 jobs.[3] The report also predicted no signs of recovery before 2012.[4]

Taking actions similar to those in other countries, the Dutch government launched a package of rescue measures totalling 6 billion euro in order to stimulate the economy. These measures were especially aimed at supporting the building sector, by reviving shelved government-funded projects, by bringing new projects forward in the planning process, and by protecting jobs within the sector as much as possible.[5] By means of a central government-funded 'crisis budget' of 395 million for 2009 and 2010, municipalities, developers and builders have been encouraged to continue with scheduled projects.[6] In addition, municipal councils have agreed to lower the price of building plots.

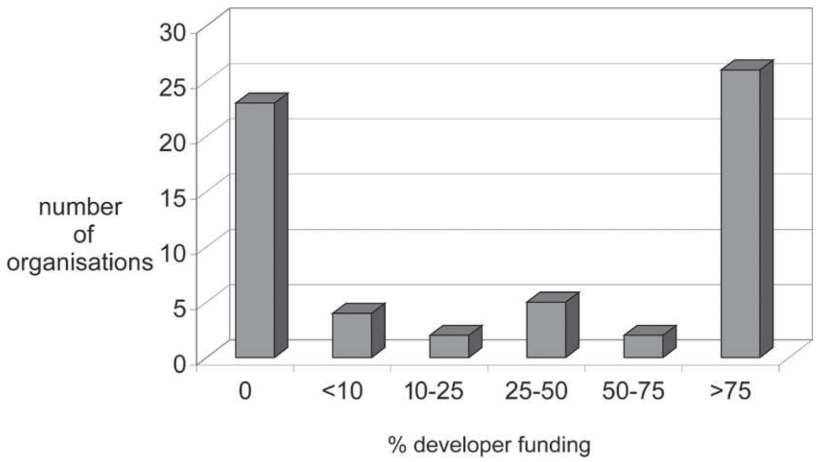
Despite these measures, the effects of the crisis have meant that the national budget deficit continues to grow rapidly. For 2009 the deficit was estimated at around 5% of the gross domestic product (GDP), around 33 billion euro, and for 2010 as high as 6.7% of the GDP.[7] Additional measures have been introduced to further reduce this deficit. For instance, national spending in 2010 will have to be reduced by at least 12 billion euro. To achieve this, the government has launched a list of (possible) measures, such as raising the pension age from 65 to 67, lowering the income level for means-assisted mortgage repayments by the state, shortening the duration of social insurance payments (such as financial support for the unemployed), and raising the student fees for higher and academic education.[8] These measures, whilst aimed at lowering the budget deficit, are also expected to have a negative influence on economic growth, for instance a decline in consumer purchasing power. This would again lead to a negative economic knock-on effect on, leading to the introduction of additional cost-reducing measures.

Another consequence of the recession from 2010 onwards will be that local and regional authorities will be facing severe cuts in their budgets. Not only will less money be provided by the national government, but at the same time their income from selling of land and legal dues will fall as development projects have, at least in the short-term, almost come to a halt.

3 The archaeological sector

As a consequence of large-scale changes in legislation and government policies since 2001, archaeological heritage management in the Netherlands is now largely paid for by developers and carried out by municipal councils and commercial companies. In fact, well over 90% of all archaeological work is currently developer-funded (Waugh 2008, 24) and 42% of the archaeological community draws more than 75% of its turnover from activities which are funded by developers (Fig. 1).

Fig. 1. Developer-funded income in 2007-2008 (After Waugh 2008, table 7).



The majority of archaeological work, fieldwork in particular, is carried out by the commercial sector (table 1).[9] About 90% of all archaeological fieldwork is carried out by private companies, self-employed archaeologists or by agency personnel hired by municipal archaeology departments. The commercial sector itself is made of over one hundred companies (Fig. 2). These include excavation companies, archaeological consultancies, specialist services, and staffing agencies. A relative large number of archaeologists work for small companies or are self-employed.

Table 1. The share of mitigation projects carried out by municipal archaeologists and companies in in 2008.
Source: Archis.[10]

	Total	Share carried out by municipal archaeological services* (%)	Share carried out by companies (%)
Desk based assessment	1163	17.2	74.9
Evaluation by coring	2570	1.9	96.5
Field walking survey	35	2.9	82.8
Trial trenches	509	11.2	80.6
Excavation	207	30.3	57.7
Watching brief	247	9.3	85.5
Total	**4672**		

* This does not include projects carried out by regional services.

The introduction of developer-funded archaeology and the subsequent development of a commercial sector led to a rapid growth in work and employment, especially from 2002 onwards. In 2007/2008 a survey conducted by Vestigia, as part of the European project "Discovering the Archaeologists of Europe", estimated a total of nearly 800 practising archaeologists in the Netherlands (Waugh 2009, 28).[11] In another recent study, carried out by the national heritage agency, it is estimated that over 600 jobs (based on full-time employment) are provided by the commercial sector.[12] This probably accounts for over 60% of the total number of Dutch archaeologists. At the start of 2009, municipal archaeological departments employed 247 people (Arts & Bakker 2009).

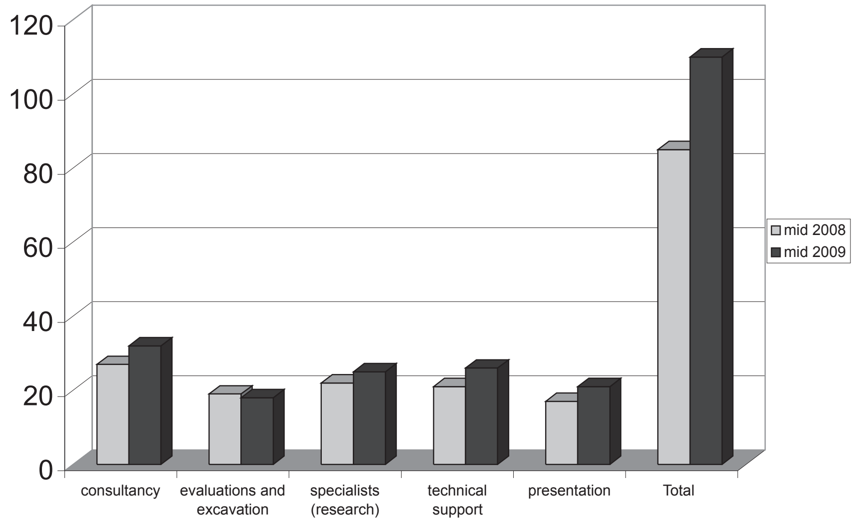


Fig. 2. The number of companies active in different areas of Dutch archaeology.
Source: VOIA.

Exact turnover figures for the Dutch archaeological market are not available. We only know that the turnover of the municipal archaeologists amounted 24.3 million euro in 2009 (Arts & Bakker 2009). A survey by the VOiA (*Vereniging Ondernemers in Archeologie*)[13], the trade association for archaeological companies in the Netherlands, calculated that the commercial sector had an estimated turnover of 34.4 million euro in 2004.[14] For the archaeological sector as a whole the turnover was estimated to be between 44 and 49 million euro for that year.[15] Up until 2008, the number of projects that companies carried out increased with 74% (their share of the total number of projects increased only slightly from 83% in 2004 to 87% in 2008). Consequently, it can be assumed that the turnover of the commercial sector has grown, perhaps to around 50 million euro in 2008.[16] The total amount of business may have grown to 70-80 million in 2008.

4 The situation in archaeology anno 2009

4.1 Archaeological companies

The figures above illustrate the close relationship between archaeology and the development and building sector, and our reliance on developer-funding. It is therefore arguably to be expected that when the building sector is hit by an economic recession that serious negative effects will rapidly be felt throughout the archaeological sector, for instance by a visible reduction in the number of fieldwork projects and secondly (as a direct consequence) a serious downturn in the employment rate.

Half way through 2009, VOIA members were asked whether, and to what extent, their own company was feeling the effects of the economic crisis.[17] The majority of members signalled no need for large scale redundancies and certainly no recent dramatic downturn. A general feeling in the sector was that the beginning of the year had indeed been rather sluggish as far as new, and especially large-scale, contracts were concerned. There were also indications that (fieldwork) companies had begun to consolidate towards the end of 2008 and the beginning of 2009. This is also shown by the statistics, to which we will turn below (see Fig. 3). By the beginning of 2009, however, many companies, especially the larger ones, already had a full portfolio of work to reasonably see them through the coming months.

Towards the summer and into the autumn, the general impression was that the number of projects being tendered was still comparable to the previous couple of years. There was certainly no feeling of ensuing crisis. And although the majority of archaeological companies work on low profit margins with limited reserves, none of the larger organisations were facing bankruptcy or had ceased operating. In fact, to the contrary, there was a small growth in the number of new companies (see Fig. 2). In addition, many of the smaller and one-person-companies, had been working so hard due to high demand over the preceding couple of years that they had been able to build up financial reserves and were now relieved to see the situation changing from “hyper” to “normal”.

Such positive signals were, however, only one part of the picture. There were clearly some difficulties as well. A few companies, who were already experiencing difficulties in keeping their employees working, were unable to renew temporary contracts and had to let go of staff. Some one-person companies were also beginning to seriously consider giving up their self-employed status and returning to more secure employment. Although supporting figures are lacking, it seems that specialists in particular, whom are often self-employed, were having a hard time.

Such difficulties cannot be attributed exclusively to an economic crisis. Other explanations include the implementation by some companies of an internal risk management policy as a result of greater external competition and a continued lack of success in tendering procedures. Such arguments can be supported by the fact that only a few fieldwork companies seemed to experience difficulties at this time whilst others still had a healthy workload and a full portfolio. Some companies even considered not tendering for projects coming up in the following months due to the extent of prior obligations. The specific difficulties experienced by specialists were also not new. Observations in 2008 had already noted that 56% of all trial trench research projects and 30% of all excavation projects did not include any specialist analyses (Van den Dries & Zoetbrood 2008, 47).

The demand for specialist expertise had already reduced by a total of 50% in all excavation projects (including trial trenching).[18] This drop is also reflected in the number of specialist analyses being published. The National Agency for Cultural Heritage has also signalled that the number of specialist reports being produced is declining compared to the growth in the number of archaeological field reports (Erfgoedbalans 2009, 108).

4.2 Municipal archaeology

As well as the commercial companies, all 44 municipal archaeologists, all of which are members of the *Convent van Gemeentelijk Archeologen*[19], were asked to comment on their experiences. Whilst the majority of municipal archaeologists are in government employment and may not immediately loose their own jobs when development projects are postponed, the local government archaeology departments often employ staff on temporary contracts, and these would clearly be put at risk by a fall-off in work.

Towards the summer almost 60% (26) of those approached had replied to the survey. As with the companies, however, no uniform picture emerged from their answers. About 42% (11) indicated that they had noticed some effects of the crisis with development projects being postponed. Two replies reported considerable less work than previously and that temporary contracts had not been renewed On the other hand, three municipalities had been taking on more work than previously!

4.3 The national information system Archis

As a third step, input in the database of the national information system Archis was monitored. All field activities and finds are required to be registered and documented in this system. It should therefore, in principle, be possible to use the system to detect changes in trends.[20] For example, for many years we saw a rise in the number of field projects (Fig. 4 and 5). Even 2008 still showed a growth of 10.8% in comparison with 2007. In 2009 this trend apparently clearly changed. When we carried out a first analysis of entries for the first quarter of 2009, the change was not that clear (see Fig. 3), but on repeating the analysis after the first half of the year (entries up to the first of September), the number of archaeological field projects had actually declined by 16% in comparison with the same period in 2008.[21] At the conference of the European Association of Archaeologists, in September 2009 in Riva del Garda, we therefore presented an expected decline for 2009 of at least 8%, taking into account – as has been the case in previous years – that the market would improve slightly during the autumn.

During the second part of 2009, analysis of the entries in Archis indicated a small revival, but with another decline towards the end of the year. The total picture suggests a decrease in projects of 10.8% for 2009. This decrease does not, however, count for all fieldwork projects. Fig. 4 and table 1 show that the number of evaluations by corings (bore hole surveys in Fig. 4) have decreased the most. On the basis of the average number of projects each month in the first half of the year, an overall decline of 12.1% was predicted. At the end of the year, however, the situation was actually worse than predicted, a decline of 15%. In the Netherlands it is customary procedure to begin new archaeological projects with an evaluation survey using corings. This method is used to localise and map potential sites predicted on the basis of desk-based research. A decrease in the number of such evaluations being carried out may arguably be a first indication that fewer projects are actually being started and that the economic crisis is beginning to have a negative effect on archaeological projects.

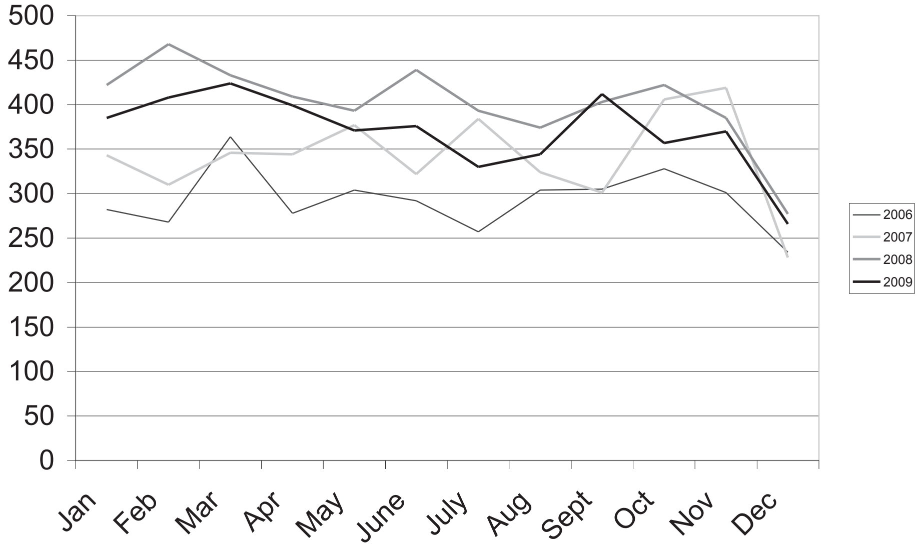


Fig. 3. Field projects carried out throughout the year.
Source: Archis.

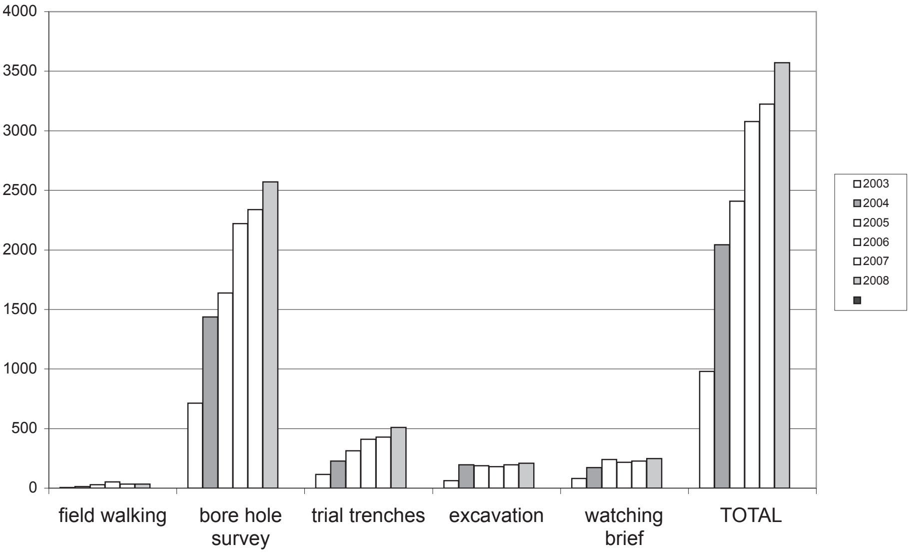


Fig. 4. Development of various types of field projects.
Source: Archis.[22]

Interestingly, the situation regarding trial trenching is slightly different. In the first part of 2009 (until August) entries in Archis indicated a growth. On this basis it was estimated that the year might show a total increase in trial trenching projects of 6.5%. However, in the second part of the year this picture changed rather rapidly and the growth was replaced by a decline of 2%. The fact that the number of trial trenches did not at first decline whilst the number of evaluations by coring did, may indicate that there were still a considerable number of projects "in stock" at the beginning of the year. As trial trenches are usually carried out as the second phase of an evaluation process, the number of projects was probably directly related to the evaluations already started in 2008 (or earlier). The decline in trial trenching in the second half of the year was probably a direct result of the fact that fewer evaluations by coring (i.e. new projects) were conducted in the first half of 2009. Support for this interpretation can be found when comparing the ratios of projects carried out in 2008 and 2009, as they have hardly changed. In 2008 1 of 5 evaluations by coring led to further trial trenching, and in 2009 this was still 1 of 4.4.

A more serious decline can be seen in the number of excavations. On the basis of the first half-year figures, it was predicted that the number of excavations would decline in 2009 by 6.7%. In fact, a decline of 7.2% was recorded. Interestingly, the ratio has hardly changed. In 2009 1 of every 11.3 evaluations by coring and 1 of every 2.4 trial trench projects resulted in an excavation, whereas this was respectively 1:12 and 1:2.4 in 2008. Once again the results seem to indicate a reduction in the total number of new archaeological projects.

The final process that we looked at, the watching briefs, initially also seemed to predict a decline. On the basis of the average monthly numbers until August, it was predicted that there would be a decline of 3.6% in the number of projects. However, the opposite occurred and the end of 2009 showed an actual growth of 3%. This may seem unusual in times of recession, but the last few years have seen a relatively large increase in the number of watching briefs (see Fig. 4) although, in comparison with 2008 (with an increase of 8.7%) the speed of the growth has started to slacken off. Nevertheless, in comparison to other procedures the number of watching briefs has increased. In 2008 1 in 10 evaluations by coring were followed by a watching brief whilst in 2009 this increased to 1 in 8.6. This trend cannot be linked to a general exponential growth in the total number of archaeological projects. Although no concrete evidence is available, it could be argued that the figures reflect an (increasing) choice for alternative, cheaper research methods instead of (more expensive) excavations.

Table 2. Development of field projects in 2009.[23]

	Numbers in 2008	Numbers in first part 2009 (up to and including August)	Prognosis for 2009	Numbers over the whole of 2009	Increase/ decrease 2009
bore hole survey	2571	1506	- 12.1%	2231	- 15%
trial trenches	509	361	+ 6.5%	521	- 2%
excavation	208	129	- 6.7%	201	- 7.2%
watching brief	248	159	- 3.6%	260	+ 3%
TOTAL	**3571**	**2180**	**- 8.4%**	**3272**	**- 10.8%**

It must be stressed that the overall downturn of 10.8% is an average for the whole country and that considerable differences occur if we look at the picture on a regional level. For example, figures from the southern peripheral province of Zeeland showed only a minor decrease of 3.1% in the number of field projects in the first half of the year, from 223 projects in 2008 to 216 in 2009. Up in the north, in the province of Groningen, a rise of 15.7% was recorded (from 338 to 391), whereas the central province of Utrecht showed a sharp decline of 50.1% (from 879 to 438 projects). The province of Zuid-Holland also showed a reduction of 7.2% (from 869 to 806).

These figures are interesting as they appear to contradict the general economic situation in each of the provinces. On an economic level, the central province of Utrecht was affected the least by the recession, whilst the more peripheral provinces were most affected.[24] Within the limited scope of this article there is no opportunity to analyse this phenomenon in more detail, we can only guess at the reasons why archaeology appears to have bucked the general trend. This may well be explained by the fact that the archaeological sector has experienced a delayed reaction to the situation in the building sector. The gradual decline in archaeological projects towards the end of the year may support this assumption. When taking the whole of 2009 into account (see Fig. 5), the province of Zeeland showed the largest decline (26.8%). The number of projects in the province of Groningen continued to rise, although in total slightly less than in the first part of the year (11%). In the province of Utrecht 2009 showed a total decline of 13.7% (compared to 50.1% in the first half of the year) and in the province of Zuid-Holland, 5.6%.

It is difficult to explain these regional differences, particularly as the figures for each region are based on different types of fieldwork. In the province of Zeeland, for instance, only the number of trial trenching projects increased, whereas all other types of field projects showed a decline. In fact, this is the only one of the four provinces that showed a growth in trial trenching projects (80%). In the province of Groningen growth is due to an increased number of watching briefs and excavations. The provinces of Utrecht and Zuid-Holland both experience a slight decline in all field projects except for excavations (a growth of 15% and 9% respectively).

4.4 Duration of projects

Apart from fewer projects, another indication of the effect of an ongoing crisis may be looked for in the duration of individual projects. An increase in a more rigorous, and academically selective approach to research designs has certainly lead to a reassessment in strategy and resulted in less extensive, and therefore shorter, and potentially cheaper, projects. An analysis of the duration of projects does present a different picture (see Fig. 5) but to be honest, the differences between the average duration of projects in 2008 and 2009 is so minimal that as a factor on its own it should not be afforded too much significance.

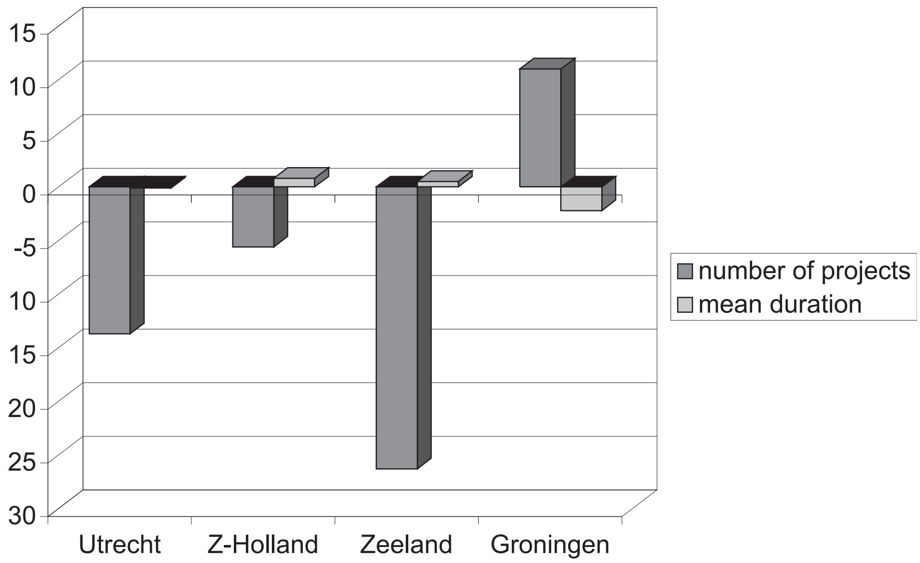


Fig. 5. The growth and decline in the number of field projects (in percentages) in four provinces in 2009, and the growth and decline of the mean duration of these projects.

In the province of Zeeland, where the total number of projects decreased, the average duration of a project showed a slight increase from 3.5 days in 2008 to 4 days in 2009. In the province of Groningen on the other hand, the opposite occurs: a rise in the number of field projects, but on average a shorter duration from 8.2 days in 2008 to only 6 days in 2009. In the province of Utrecht the figures remain fairly constant, 8 days in 2008 and 7.9 days in 2009. The province of Zuid-Holland showed a small increase from an average of 3.7 days in 2008 and 4.5 days in 2009.

4.5 Alternative explanation

At the same time there might be another factor influencing the recent observed regional growth or decline in fieldwork. As a consequence of the implementation of the new archaeological system and the new spatial planning act in 2007 and 2008, many provincial and local authorities are in the process of adapting their policies and regulations on archaeological work within the planning process. The provinces, who were until 2008 mainly responsible for enforcing surveys and evaluations, are now delegating many of their planning responsibilities to local councils. In 2009, many local councils had still not started, or were still in the middle of making regulations for archaeology in the planning process. Stricter regulations and new direct local council involvement on archaeology has a considerable influence on the number of archaeological evaluations. For instance, in situations where regulations on preventive archaeology are missing, the number of watching briefs is bound to rise. On the other hand, the implementation of local archaeological characterisation maps is expected to lead to an overall reduction of the number of small-scale surveys and evaluations. Also, the regional adoption of standard guidelines for applying coring or trial trenching in evaluations in particular situations might be more responsible for the rise or fall of these methods in 2009 in the above-mentioned provinces than economic factors.

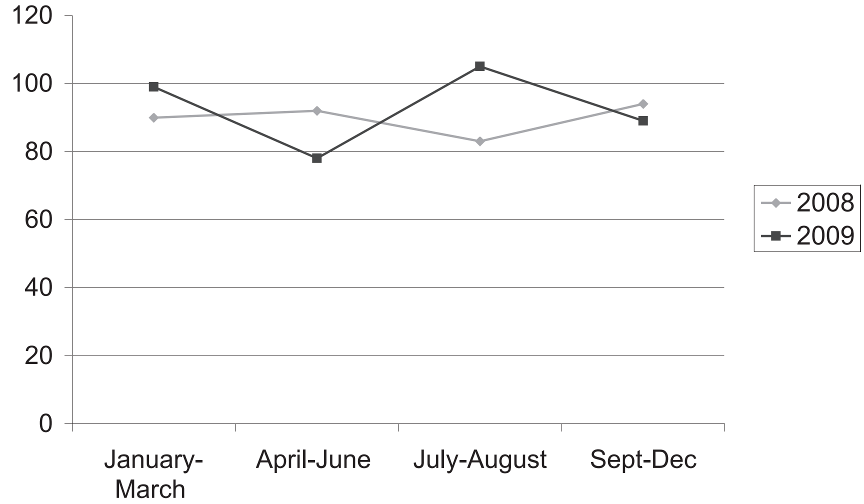
4.6 Vacancies

A final factor that was investigated in order to get an impression of the true extent and character of any crisis in Dutch archaeology is the employment rate. A dramatic fall in employment is certainly the case in the development and building sector and is also very evident within the archaeological sector in many other European countries (see other contributions in this volume).

We questioned one of the larger archaeological employment agencies in the Netherlands, Vriens Archeo BV, about its findings over the last year. The agency had noticed a slight increase in the number of advertised vacancies in the first quarter of 2009 (10%) compared to the year before (see Fig. 6). This supports the view of the companies who claimed still to have had a reasonable amount of work in the first months of 2009. The agency noticed a decrease in the number of advertised vacancies in the second quarter of the year (21%, from 99 to 78). This decrease was much greater than that experienced in previous years, and also backs up the picture presented by some companies who had to lay off temporary staff for the first time in years.

This does not mean however that the unemployment rate among Dutch archaeologists rose in this period. In fact the opposite proved to be the case. Since there were still companies who were structurally understaffed when it came to qualified personnel, these employees that were laid off were mostly very quickly re-employed elsewhere. The increase in the number of vacancies filled by Vriens Archeo BV a this time supports this analysis. While the number of vacancies decreased, the so-called success rate for candidates for vacancies increased from 82% in the first quarter of 2008 to more than 95% in the first quarter of 2009.[25]

Fig. 6. Number of vacancies advertised by employment agency Vriens Archeo BV.

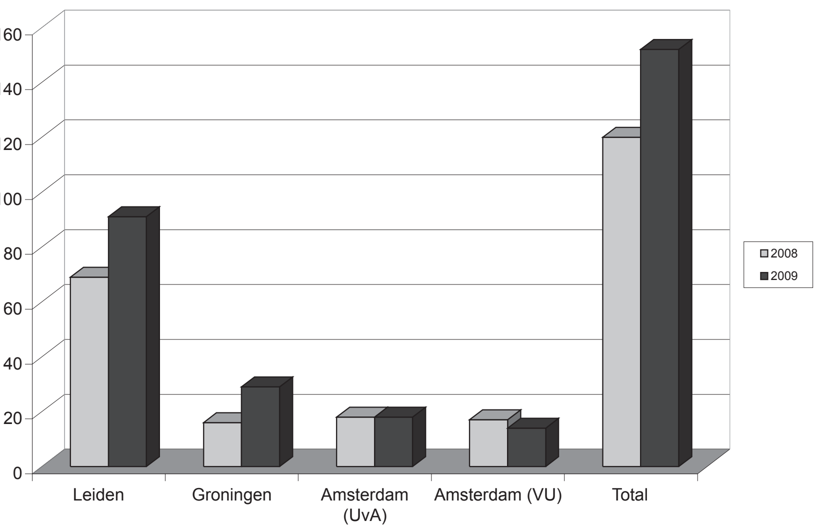


In the second half of 2009 there was a sharp revival of 35% in the number of vacancies (from 78 to 105), which was followed by a reduction of 16% again in the last quarter of the year. This coincides with the temporary growth of the number of field projects right after summer (see Fig. 3). The number of vacancies that were subsequently filled remained at a high level, 92% in the last quarter of 2009. This may indicate that there were enough people available to fill the posts, or that there was a higher percentage of employees changing jobs.

4.7 Students

Another visible effect of the crisis can be considered. All universities and academies have seen an increase in student numbers (Fig. 7), 25% in total. A decline in job opportunities, especially for young people, tends to lead to an increased uptake of higher education opportunities, rather than running the risk of unemployment. Departments of Archaeology have experienced a growth in student numbers. The Faculty of Archaeology in Leiden, for instance, has 32% more new students in 2009 than in 2008. Across the country as a whole, there have been a total of over 100 first year archaeology students registering at universities and over 50 in other higher education institutions.

Fig. 7. Student numbers
Source: Leiden University.



An increase in student numbers seems to be one of the few positive effects of the crisis. This state of affairs may sadly only be temporary. The impending increases in student fees may well lead to another decrease in student numbers.[26] Rising student numbers may also turn out to be disadvantageous in the longer run for the students concerned. If the number of jobs in archaeology starts to stabilise again, then the moment will inevitably be reached when demand does not meet the increased supply of new archaeologists. After many years of full employment such a turn around in circumstances could well lead to the threat of unemployment again.[27]

5 Analysis

On the basis of the above figures it could be concluded that there are indications that the economic crisis is having negative influence on the sector as a whole. However, we must bear in mind that the total amount of work available over 2009 as a whole still nearly equals that of 2007, when we were very happy with such statistics. It is, however, interesting to observe how a relatively positive situation can change rather rapidly and that a deep recession such as is being experienced at present has different effects on the various parts of the archaeological heritage management process as well as on the various groups within the archaeological community. The fact that almost all evaluation work is carried out by commercial companies, inevitably means that they are hit first when new projects are delayed or cancelled.

Despite the fact that the volume of fieldwork has decreased, this situation has, as yet, had no dramatic consequences. To date there have been no recorded bankruptcies in the archaeological sector, compared with other sectors that have recorded a total of 8012 bankruptcies in 2009.[28] The Netherlands, in this respect, seems to be in an exceptional position, especially when compared to the dramatic situation in other European countries in which archaeological heritage management is primarily a commercial activity (Aitchison 2009). There may be several reasons for this difference. One reason may be found in the way the Dutch commercial sector operates. Because of the size of the country, most companies can fairly easily operate across several regions or even across the whole country. In addition, the majority of companies do not specialise in one type of activity, but prefer to offer the entire range. Such companies have been able to remain flexible and can adapt to changing circumstances. In fact, the regional diversity discussed earlier in this article may eventually turn out to be beneficial for companies that have learnt to diversify: it may be that fewer evaluations are being carried out in one region, but a company may well be compensated for this by being able to undertake other types of projects in another. A diversification in activity base seems to be the answer here.

The main reason that the archaeological market remains fairly stable in the Netherlands, lies in the organisation of the heritage management system. Archaeological research in the Netherlands is primarily conducted as preventive archaeology which relies heavily on tenders and contracts from local authorities (municipalities). These authorities are responsible for decisions on building and development and therefore also decide on the premises for archaeological research. Projects are predominantly funded with public money. According to the data in Archis, only a small part (10-15%) of all field projects in 2008 were commissioned by the private sector, the vast majority were commissioned by government or semi-government organisations. Current government-funded building projects such as new motorways and road widening schemes, railways, terminals, coastal and river defences, wind parks and power stations are providing a large number of archaeological projects. A decrease in private sector initiatives is being compensated by an increase in public sector financed projects.

The early stage of development of the new archaeology system in the Netherlands is also an important factor for consideration. Many local governments in particular are only just starting to put the Valletta Convention into practice and are now in the middle of developing their own archaeological policy and ensuring its implementation within their own organisation. Demand for municipal and regional characterisation maps and inventories is still high (including so-called second generation maps based on an evaluation of earlier products), and accounts for a considerable number of contracts (mostly in the consultancy sector) and a fairly constant number of vacancies for local archaeological officers. Such work also leads to an increase in the number of desk-based studies being carried out (see Fig. 8). This necessary work on policy-based projects is providing compensation for the decline in fieldwork projects and will most probably keep the sector as a whole fairly busy for possibly at least another two years.

Because of the reasons given above, it is not expected that the situation will deteriorate further in the short term. The archaeological sector may even profit from the governmental measures undertaken to stimulate the property development. These new policy-development activities may partly compensate the decreasing demand for archaeological research. Furthermore, there are also indications that since the end of 2009 the economic situation within the country has started to improve.

Nonetheless a note of caution is important. There are several reasons why we can expect that the worst is still to come. Firstly it is acknowledged that the archaeological sector traditionally exhibits a delayed reaction to any changing circumstances in the building and development sector. It is clear that, in 2009, many companies are still working on long-term projects and contracts won in 2008 or even earlier. The big question is what will happen once these contracts come to an end if they cannot be replaced with new ones. The decreased number of evaluations by coring in 2009 may well lead to a further fall in the number of trial trenching projects and full-scale excavations in 2010. Whilst at the moment it may still be possible for one-person companies to have a little bit more spare time, their financial situation may quickly change, the longer this calm period lasts and the longer they have to eat into their savings.

Secondly, the uncertainty of the economic situation as a whole must be considered. Although it seems that the recession may be coming to an end and that the first improvements have been signalled, the long-lasting effects of the crisis are very difficult to predict. The long term prognosis could well suggest a further ongoing crisis. For the development and building sector, for instance, a further decline of 4.3% is expected in 2010.[29] Long-term government policy will also continue to concentrate on spending cut-backs in an attempt to improve the budget deficit. If the present phase of government-funded building projects is not replaced by new private sector developments in the near future, then the archaeological sector will clearly begin to suffer. In addition, the expected cuts in the budgets of local governments themselves might also lead to stagnation in the further development and implementation of archaeological policies and even a less strict application of rules and regulations in projects. In that case the "second dip" can put an extra strain on the employment of local policy officers and strengthen the call for fewer archaeological interventions.

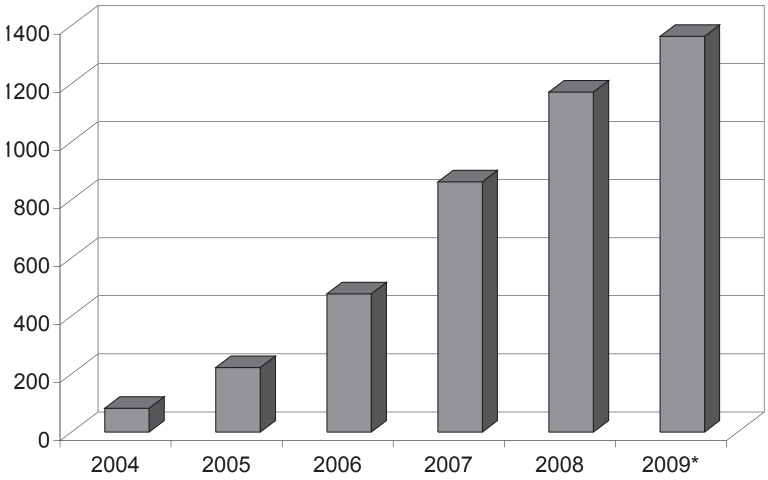


Fig. 8. Desk-based assessments.
Source: Archis.

6 Concluding remarks

Although the economic crisis has had a visible negative effect on the archaeological sector in the Netherlands, it has not, as yet, lead to severe situations such as mass unemployment, as experienced in other European countries. For now we count our blessings. The sector may even profit from the crisis. It is known that Dutch archaeology has been growing rapidly for many years and, as a result, there has been a period of little or even no unemployment for almost any archaeologists wanting to work in the sector. Ironically this has meant that the infrastructure has been rather overstrained: too many companies competing heavily for projects, with unsustainable levels of price cutting as a result and a serious shortage of well-qualified personnel. The economic crisis may well help to steady and stabilise the situation and may eventually allow the stronger companies that do survive to charge more realistic rates that allow the build up of financial reserves in order to survive future market fluctuations. Finally, It is worth recalling that a decline in economic growth and development activities can also significantly reduce the pressures on, and threat to, the archaeological heritage *in situ*. The crisis, therefore, has many faces.

Notes

1. CPB, *June 2009 forecast*, see http://www.cpb.nl/eng/news/2009_18.html (last accessed 19-01-2010).

2. CPB, *Memorandum March 2009*, see http://www.cpb.nl/eng/pub/cpbreeksen/memorandum/222/memo222.pdf (last accessed 19-01-2010).

3. Ibidem.

4. Economisch Instituut Bouwnijverheid, press release April 2009, see http://www.eib.nl/ShowPers.cfm?ID=358 (last accessed 19-01-2010).

5. http://www.regering.nl/Onderwerpen/Arbeidsmarkt_en_economie/Kredietcrisis (last accessed 19-01-2010).

6. http://www.regering.nl/Actueel/Pers_en_nieuwsberichten/2009/juni/12/Kabinet_stimuleert_woningbouw (last accessed 19-01-2010).

7. CPB June 2009 forecast, see http://www.cpb.nl/eng/news/2009_18.html (last accessed 19-01-2010).

8. *Rapport van de werkgroep Gerritse, Mogelijkheden voor ombuigingen, stabilisatie en intensiveringen* (February 2009), see http://www.minaz.nl/dsc?c=getobject&s=obj&objectid=118822 (last accessed 19-01-2010).

9. These figures have been taken from the national archaeological information system Archis (www.archis.nl).

10. These figures are all drawn from the national archaeological information system Archis (www.archis.nl). Due to delayed input within the system and corrections these numbers may vary slightly over time.

11. See www.discovering-archaeologists.eu.

12. Rijksdienst voor het Cultureel Erfgoed, *Erfgoedbalans 2009, Archeologie, monumenten en cultuurlandschap in Nederland*, p. 105.

13. www.voia.nl.

14. VOIA, 2006, *Actuele omzetcijfers voor de archeologiebranche*. See http://www.voia.nl/files/Perspublicatie%20Branche%20onderzoek%20DEF.pdf (last accessed 19-01-2010)

15. Ibid.

16. We have to take into account that many are small coring projects (one or two days) and that the average price per project was much lower than in former years.

17. This gives a fairly reliable indication of the situation as at the time, nearly all companies operating in Dutch archaeology were members of this organisation.

18. Specialist work refers here mainly to archaeo-botanical, archaeo-zoological and small finds work. Other specialisations as for instance physical geography and pottery don't show the same drop.

19. See www.gemeente-archeologen.nl.

20. Care must, however, be taken in making interpretations and in forming conclusions. Some changes in trends may, for instance, be partly explained by changes in reporting behaviour. Prior to 2006 not all activities were systematically reported as this was not yet obligatory. For subsequent years the figures should be expected to be fairly reliable. However, due to the backlog in data entry in the system small deviations in results may occur when figures are reanalysed at different moments in time.

21. Field projects include field walking surveys, evaluation by coring, excavations, trial trenches and watching briefs.

22. The data on the early years (until 2005) may not give a complete image of the situation as probably not all projects were registered in the system then.

23. These figures are all drawn from the archaeological information system Archis (www.archis.nl). Due to retrospective input and corrections the numbers may slightly change over time.

24. See http://www.parool.nl/parool/nl/30/ECONOMIE/article/detail/244105/2009/05/22/Crisis-treft-provincies-ongelijk.dhtml (accessed 19-01-2010).

25. We do not have information on the type of contracts these people are employed on. It may be a temporary situation, if it concerns mainly short contracts.

26. Already the student fee is over 1600 euro per year (in 2009).

27. We have some information on the demographic composition (age pyramid) of our profession, on the size of the oldest generations of archaeologists and the pace with which they need to be replaced by younger ones (Waugh 2008, table 32, p. 40). As the largest group of the employees 58% is between 29 and 49 years of age, and only 18% between 49 and 60, the natural out flow of older employees will not be very high in the next decade.

28. http://nos.nl/artikel/125882-recordaantal-faillissementen-in-2009.html (last accessed 19-01-2010).

29. TNO Bouw en Ondergrond, 2009, Bouwprognosis 2009-2014, TNO-report 034-DTM-2009-04560. See http://www.tno.nl/downloads/rapport_bouwprognoses_2009_2014.pdf (accessed 19-01-2010).

References

Aitchison, K., 2009, After the 'gold rush': global archaeology in 2009, *World Archaeology* 41(4), 659-671.

Arts, N. & C. Bakker, Gemeentelijke archeologie anno 2009, *Archeobrief* 2, Jaargang 13, 22-25.

Dries, M.H. van den & P.A.M. Zoetbrood, 2008, *Werk in uitvoering (2): van veldwerk tot standaardrapport, een onderzoek naar de kwaliteit van rapporten van archeologische proefsleuven en opgravingen*, Erfgoedinspectie, Den Haag.

Rijksdienst voor het Cultureel Erfgoed, 2009, *Erfgoedbalans 2009, Archeologie, monumenten en cultuurlandschap in Nederland*, Amersfoort.

Waugh, K.E., 2008, Discovering the Archaeologists of Europe: The Netherlands, Archaeology Labour Market Intelligence Survey 2007-8, *Vestigia Report* 595, Amersfoort.

Acknowledgements

We would like to thank all the individuals from the following organisations who provided us with data and experiences: NVvA, VOIA, CGA, Vriens Archeo BV, Vestigia BV, Leiden University, the Inspectorate for Cultural Heritage and the National Agency for Cultural Heritage. We are grateful that our colleagues Nathan Schlanger and Kenneth Aitchison organised a session on the impacts of the economic crisis at the conference of the European Association of Archaeologists in Riva del Garde and provided the opportunity for us to present the situation in the Netherlands.