



The Dutch Maritime Strategy 2015 - 2025



Preface

Before you lies the Dutch Maritime Strategy, 2015-2025. It is a unique document which provides a comprehensive framework for the government-wide¹ policy for the maritime cluster. It has been established in close cooperation with the maritime cluster.

Cause for the government-wide strategy is an awareness of an increasing correlation and cross-linking of the maritime industries and the need for a better alignment with trends and developments in society. Furthermore, an ever closer cooperating maritime cluster needs an integral maritime government policy.

The maritime strategy reveals the main challenges for the maritime policy for the coming years and how the government and the maritime cluster will each contribute to it. The maritime strategy does not stand alone, together with other relevant national and international governmental policies it provides an answer to the challenges that the maritime cluster is facing.

An included policy agenda substantiates the maritime strategy. It specifies the measures that are necessary to achieve the ambitions of the maritime strategy.

Reader's guide

Chapter 1 discusses the importance of the maritime cluster and the relations between the different parties. Chapter 2 describes the objectives and ambitions of the Dutch maritime strategy and outlines the relevant social trends and developments. Chapter 3 describes the governance structure and how the national government and the maritime cluster will cooperate. Chapter 4 subsequently mentions the areas on which the policy is focused in order to enhance the performance of the cluster as a whole. Finally, chapter 5 contains a policy agenda including measures that are necessary to achieve the ambitions of the Dutch maritime strategy.

¹ In principle, the words 'the State', 'national government', '(government of) the Netherlands', or 'Dutch government' relate to: (the central government of) the country the Netherlands, including the Dutch public entities of the Caribbean area (Bonaire, St. Eustatius and Saba) but excluding Aruba, Curacao and St. Maarten, unless it concerns matters with regard to the Kingdom of the Netherlands as a whole, such as matters in the field of foreign policy and national defence.

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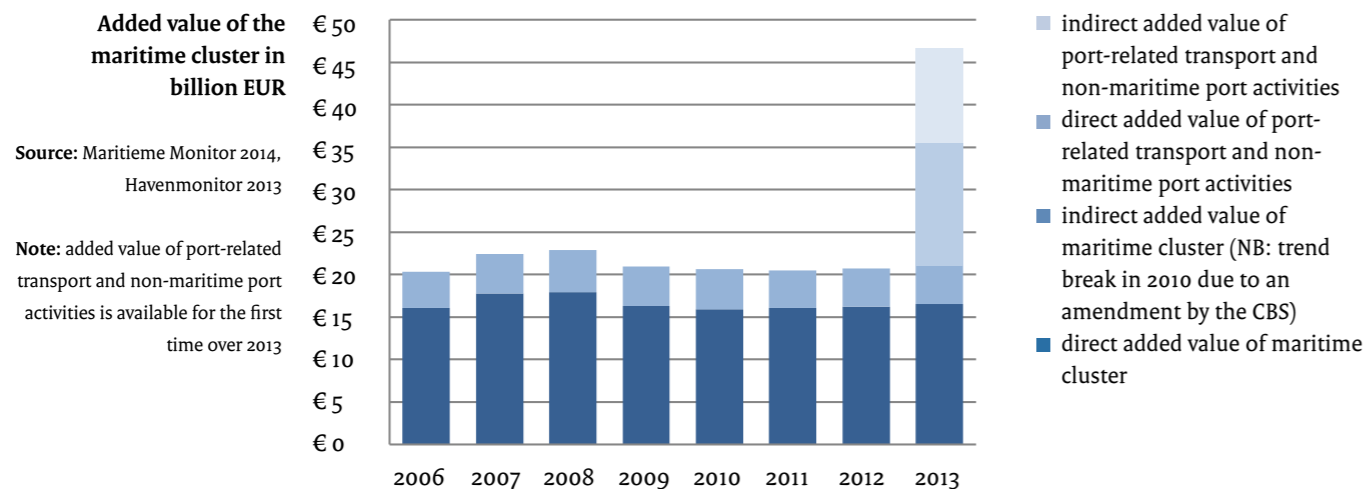
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Introduction

As a trading nation, the Netherlands has succeeded in building up a strong global maritime position, partly as a result of the strategic position at the estuary of the rivers Meuse, Rhine and Scheldt. This is reflected in the international leading position of the industries from the Dutch maritime cluster, a cluster which is pre-eminently internationally orientated and regulated. Rotterdam is regarded as 'gateway' to Europe and as Europe's largest port, it serves a hinterland with hundreds of millions of inhabitants. The Netherlands has an open economy and is one of the world's ten leading exporters. The maritime cluster contributes significantly to that position, because more than half of the turnover is realized abroad. The total export turnover of the cluster amounted to over € 21 billion in 2013.

The Dutch maritime cluster is active on all continents and includes: ports, offshore, maritime suppliers, shipbuilding, maritime shipping, dredging, maritime services (including maritime education and knowledge institutes), inland shipping, water sport industry and the fishing industry. The Royal Netherlands Navy is also included in this cluster. It contributes to an adequate protection of vital Dutch maritime interests by ensuring an unhindered global transport of raw materials and goods and a secured access to maritime infrastructures.

In 2013, the maritime cluster, consisting of more or less 12,000 companies, provided employment to approximately 224,000 people and achieved a total added value of € 21 billion, which is 3.3% of the GNP of the Netherlands. If the port industrial complex and port-related transport are added, it amounts to 7.3%.



There are financial and spatial relations between the cluster members, thus they benefit from knowledge spillover and economies of scale. At a national level, the companies involved in maritime shipping, offshore, inland shipping, marine engineering, water sport industry, fishing industry and ports are important customers of shipbuilding companies, maritime suppliers and service providers. At an international level, export activities of, for example, offshore enterprises, provide opportunities for other industries in the maritime cluster. The aforementioned knowledge spillover comprises the effects of innovation and the labour market. The maritime shipping industry is a booster for innovation and knowledge development in other industries. Through the annual outflow of employees from the maritime shipping industry, important knowledge is transferred to the offshore industry, marine engineering, ports and maritime service providers. The ports are a perfect example of spatial relations in the maritime cluster, because they have a logistic hub function and they provide an important settlement location for (large scale) industry and service centres. This also allows other companies to benefit from the agglomeration and image effects arising therefrom.

In other words: the cluster as a whole is greater than the sum of its parts. It is a stable, capital-intensive and high-quality sector, thus making it the driving force for a prosperous future. Firmly rooted in the heart of society and open for cooperation. It is our national calling card when it comes to innovation, courage and entrepreneurial spirit, properties that have enabled the maritime cluster to break new grounds in a changing world and economy. The cluster is a global leader in finding solutions others cannot see, or dare not pursue. All this makes the Netherlands 'the' maritime heart of Europe, with one of the strongest maritime clusters of the world.



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Objectives and Ambitions of the Maritime Strategy

As part of one of the most open economies in the world, the Dutch maritime cluster has invested significantly in its development, and with success. The cluster is powerful, innovative and has a strong international position. However, this is not a guarantee for the future.

There are several trends and developments worldwide that can influence the maritime cluster. Structural economical, demographical, ecological and security policy changes affect the maritime cluster to a greater or lesser extent. Consider for example global production patterns, gradual improvement of the sustainability of production and consumption, changes in energy consumption, technological innovation, climate changes and new security threats. There's an apparent geostrategic weight shift of OECD-economies to rising markets. In addition to the BRICS-countries², Africa is also developing spectacularly. Due to the rise of new powers, the relative economical share of the US, Japan and the EU will continue to decline in the coming years, which will have an impact on the worldwide demand for products and services and their related flows. For the future, it remains of importance to the maritime cluster to keep up with the global developments and to take actions accordingly.

This changing world presents challenges and opportunities for the cluster such as access to new markets and trading partners. However, there are also threats and risks and the competition is not going to wait for us to catch up. Additional efforts are needed to maintain and strengthen the contribution of the maritime cluster to our national economic and social interests.

This requires a government-wide performance and an active maritime cluster. Due to its size, network and firm position, the maritime cluster can make a major contribution to a sustainable economic position of the Netherlands. An intensified cooperation between the national government and the relevant parties from the maritime cluster will lead to a mutual reinforcement of public and private interests.

Therefore, the national government opts for the following ambition:

An international sustainable leading maritime position for the Netherlands, achieved by an integral cooperation between the national government and the maritime cluster on a basis of a shared maritime strategy.

In order to assess the extent to which this ambition is achieved, international reference material is needed. This is only partly available, because the information regarding the performance of the maritime cluster the Netherlands collects through the maritime and port monitors is not available in a one-one ratio on the international level. Therefore, additional attention must be paid to the measurability of the performance of the maritime cluster compared to other countries during the forthcoming period. In as far as this information is available, it appears that the Netherlands has a reputation to uphold in the field of transport and logistics related areas. Internationally approved rankings on the matter show that the Netherlands is listed in the top three. In addition, the Netherlands harbours the largest port in Europe, the Dutch inland water fleet has the largest European market share, the Netherlands is the leading producer of super yachts and the offshore and maritime engineering industries rank among the world's finest.

² Brazil, Russia, India, China, South Africa.





Cooperation

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Challenges in maritime core areas such as employment, innovation, trade, logistics, safety and environment are becoming increasingly complex. Regarding these areas, both public and private interests are at stake. This means that the government and the maritime cluster need each other to be successful. Cooperation is a prerequisite for success. This does not only involve the cooperation between the national government, employers and employees, but also the cooperation with local authorities and regions, knowledge and educational institutions and NGOs in fields such as nature, environment and health. An example of cooperation between the government and the maritime cluster is the execution of collective (by industry, knowledge institutions and the government) integral action agendas of the top sectors Water and Logistics, who by this government-wide maritime strategy, are given extra energy and focus for the Dutch maritime cluster.

In this collective approach, the national government takes up its role and responsibility to provide optimal space for entrepreneurship and securing the public interests in the field of economy, accessibility, safety³ and the environment. The national government wants to contribute by stimulating:

- A favourable business climate and a European and global level playing field;
- Adequate (international) regulations⁴, including timely implementation, with an effective policy, implementation and enforcement chain. But also by responding to international developments on new regulation and where possible, reducing the regulatory burdens;
- Shared knowledge development and innovation in addition to innovation orientated and socially responsible procurement;
- Sufficient construction and adequate management and maintenance of the infrastructure, including better utilization;
- Adequate qualification requirements (adapted to the needs of the maritime cluster) and a coherent educational infrastructure;
- Adequate economical diplomacy and guarding and managing the vital Dutch maritime interests (amongst others by contributing to the international “rule of law”, the regional stability and offering protection against piracy).

Obviously, a collective approach and cooperation can only succeed if the maritime cluster is prepared to take on a large responsibility in the realization of the maritime ambitions. Therefore, the government expects parties to not only make efforts to achieve their own objectives, but to also feel responsible for contributing to the public interests: employment, accessibility, integrity, safety and the environment. It is all about socially responsible entrepreneurship with a proper balance between “people, planet and profit” by:

- Being an attractive employer, so that maritime knowledge is retained for the Dutch maritime cluster;
- Contributing and sharing specific knowledge and expertise;
- Strengthening the cooperation between parties;
- Enforcing a high environmental and safety awareness, so that economical and personnel damage is reduced and legislation is well respected.

Additionally, national collaboration between the industries can also be helpful in international marketing of expertise, thereby contributing to the earning capacity of the industries.

During the implementation and elaboration of the maritime strategy, there will be a regular dialogue between the relevant ministries and the maritime cluster in the form of periodic consultations. By this structural dialogue, the progress of the maritime ambitions can be reviewed and, if necessary, they can be amended at an early stage. Concurrently this meets the urgent desire of the maritime cluster for the creation of a ‘single window function’ by the government, with the objective that the different ministries converge and that policy ambitions are actually translated into a robust and coherent toolbox (innovation/export/financing) that takes the characteristics of the maritime cluster into account. The policy agenda listed in chapter 5 serves as a basis for the planned regular consultation.

³ “Safety” and “Security”.

⁴ This is consistent with the actions of the IMO and the European Commission in the framework of “Better Regulation”.

4

Cluster-Wide Policy Areas

To strengthen the maritime interests of the Netherlands, the policy should focus on areas that are relevant to the entire maritime cluster. These unifying areas enable knowledge, experience, best practices and innovations to be shared cluster-wide, and solutions that contribute to the strengthening of the maritime cluster as a whole can be found. After all, it makes no sense to find solutions for the separate industries if the outcome is less than optimal for the maritime cluster as a whole. Unifying policy areas that are the focus of the maritime strategy are:

- Human Capital
- Innovation
- Trade
- Accessibility
- Safety and the Environment
- Security and Stability

For these areas, the maritime strategy wants to align with the general social trends and developments. This means that the maritime strategy will opt for solutions that are in line with the development directions below as much as possible.

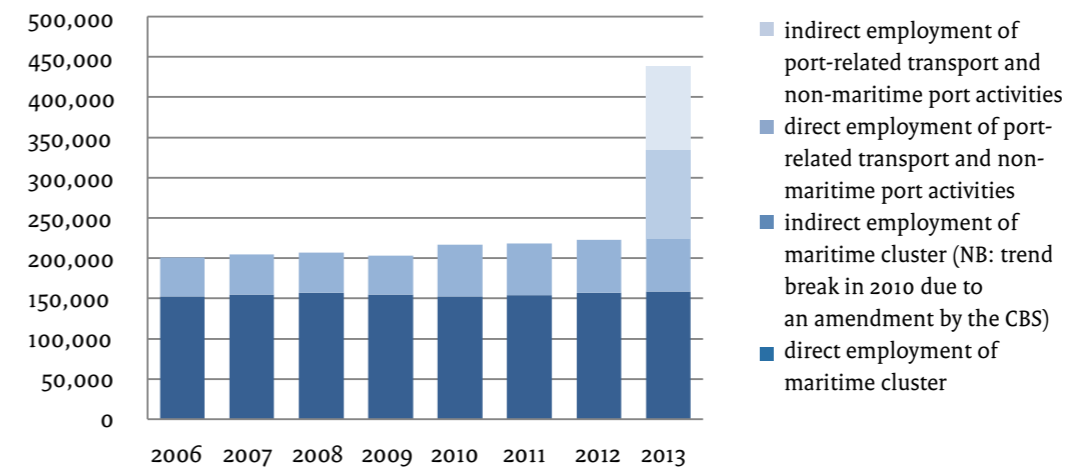
Desired Developments of Maritime Policy

From	To
Separate industry solutions	Cluster-wide solutions
Generic solutions according to offer	Customized solutions according to demand
Expanding infrastructure	Construction and better utilization
Separate mode of transport	Logistical chain/Cargo flows
Physical flows	Information flows
Incidental solutions	Sustainable solutions



4.1 Human Capital

The industries from the maritime cluster collectively generate around 2.5% of the employment in the Netherlands, even without counting the employment in the associated port industrial complex. The maritime cluster, the port industrial complex and the port-related transport together stand for about 5% of the employment of the Dutch working population. Most cluster industries, have an aging professional population and there's need for fresh blood. This includes both craftsmen and highly trained professionals.



Employment Maritime Cluster in Persons Employed

Source: Maritieme Monitor 2014, Havenmonitor 2013

Note: added value of port-related transport and non-maritime port activities is available for the first time over 2013

The international context of the maritime cluster implies that regulations related to job requirements are determined internationally. This applies to inland shipping, where the requirements have been defined in both the EU and CCR. This also applies to maritime shipping, dredging and the fishing industry, where the international treaty "Standards of Training, Certification and Watchkeeping" sets the minimum requirements in the field of education and training. This treaty largely determines the content of the national nautical curriculum. Furthermore, based on this treaty, there is a considerable stern supervision on the educational system by the IMO and EMSA.

Due to the international context, there's a fierce competition within the maritime sector in relation to employment and working conditions. In order to contribute to the improvement of these employment and working conditions and to ensure 'decent work' for all seafarers, the Maritime Labour Convention was implemented in 2013. For the fishing industry, the International Labour Organization adopted the Work in Fishing Convention in 2007. This treaty has the same objectives as the Maritime Labour Convention. A legislative proposal for the implementation of the Work in Fishing Convention will be presented to the Dutch House of Representatives in 2015.

Ever since the eighties, the maritime sector employs a lot of foreign seafarers, in part because of insufficient availability of Dutch officers and the fierce international competition on employment conditions. To avoid becoming too dependent on foreign personnel and to preserve the knowledge of the maritime cluster in the future, it is important to find a healthy balance between national and international employees. Therefore it is essential, that at least two conditions are met. In the first place, there must be sufficiently competent and motivated Dutch personnel available in the years to come. To meet this condition, it is important to continue encouraging the choice for maritime professions. Secondly, it is important to retain the current personnel in the maritime sector. These two aspects will be further elaborated below.

Initiatives of the industry, educational institutions and the national government, to recruit more young people for technical and maritime education, such as maritime introductory internships and the 'Technology Pact' are paying off. In most maritime cluster relevant training courses at vocational, higher educational and university level, there is an increase of enrolment. More graduates for the maritime and

technical labour market are expected to become available in the coming years. However, this increase does put pressure on employers to provide sufficient training positions in this time frame. In order to relieve some of this pressure, the Netherlands will plead, at an international level, for an expansion of the opportunities to gain experience in an equivalent matter by intensifying the use of modern technology such as simulators. This is especially important for the maritime and inland shipping industries.



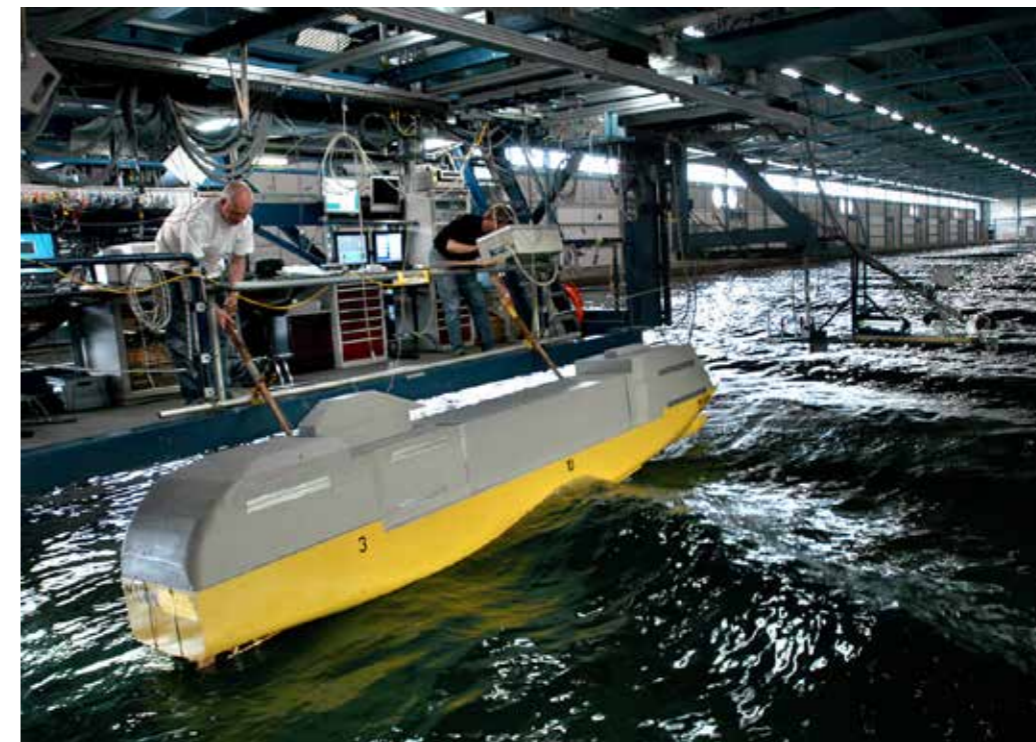
Retaining current maritime personnel is also essential. Primarily for the continuity of the enterprises, but also for the preservation of high-quality maritime expertise in the Netherlands. This implicates that the enterprises in the cluster, both the large ones and the SMEs, will have to offer their personnel development opportunities and career prospects. Furthermore, the possibilities for labour mobility within the Dutch maritime cluster must be increased.

Because industry, the national government and educational institutions take part in various commissions, nautical education has been well adapted to the needs of industry. In manufacturing and offshore industries there's also need for a strong connection between education and industry needs and strengthening of curricular continuity. This implies that maritime-technological educational institutes must also take the innovations of the maritime cluster into account, for instance by offering flexible vocational, higher educational and university programs that respond to the newest developments and by offering curricular continuity. In view of both development opportunities and labour mobility, additional training courses, permanent vocational training and retraining opportunities where modern IT applications can be deployed, are desirable. Thus, the principle of a 'lifelong of learning' is introduced to the maritime cluster. At the end of the day, innovations in the maritime cluster require a balanced range between specialist and widely applicable maritime knowledge and skills from the maritime educational institutions.

4.2 Innovation

The leading position of the Dutch maritime cluster is partly due to its innovative strength. Intensive cooperation between enterprises, knowledge institutes and the national government ('the golden triangle'), within and amongst the top sectors, focusing on innovation of the maritime processes, products and services, supports the ability to innovate. A strong cooperation between the knowledge institutes, such as the Maritime by Holland Innovation Council and the MARIN Advisory Council, is essential. The R&D efforts of the maritime cluster amount to 3.9% of the added value generated by the cluster, which is higher than the national average of 2%.

To remain competitive, the maritime cluster will need to continue to innovate, not only in the field of technology, but also in accordance with the principles of social innovation. It is to be expected that the cluster will have to distinguish itself with knowledge and quality even more than it did before. Important innovation areas for the coming years are the environmental performances of the fleet (environmental friendly vessels), support for the offshore extraction of raw materials and energy generation, smart and safe maritime navigation, focus on social innovations⁵ and an improvement of the integration of the maritime cluster in the logistics chain. To further stimulate innovation in the sea ports, knowledge will be exchanged where possible and innovation projects of port authorities will be linked to the port industry.



To enable innovative solutions, and thus contribute to the competitive position of the maritime cluster and the public interests in the fields of employment, safety, sustainability and accessibility, the top sectors Water and Logistics will execute their Innovation Contract, wherein there will be a cooperation for the innovative areas by the industry (both large companies and SMEs), knowledge institutes (both fundamental and applied) and authorities. Research will be jointly programmed and funded.

⁵ Social innovation involves changes in organizational forms, dynamic management, the use and creation of talents and knowledge of staff and the cooperation with external parties with the purpose of gaining better use of knowledge and maintaining or even reinforcing the competitive position.

The national government will provide an impulse by supporting private research from public organizations (TKI Surcharge Scheme), by stimulating innovating SMEs (SME Innovation Support Scheme Top Sectors) and by offering generic support through fiscal instruments such as the Research and Development tax credit (WBSO), the Research & Development Allowance (RDA) and other financing instruments. The government also stimulates maritime innovations by providing operational knowledge and user know-how, by offering opportunities for tests or evaluations or by acting as a 'launching customer'. The Royal Netherlands Navy is already acting as such and currently the possibilities for other governmental vessels are being examined. Furthermore, the government purchases innovations from private companies in order to address social problems (such as environmental pollution). The tenders of small entrepreneurs are favoured. The government can ask them to think of a solution instead of asking for a product. In conclusion, adequate government policy is essential for innovation. The national government plans to contribute to innovation (innovative solutions) through goal-based regulation, by removing redundant regulation and by providing greater scope for experimentation. Simplifying regulations and providing clear information also helps businesses to respond to new developments in a timely manner.



Regarding co-financing innovation, the focus is inter alia on better use of European funds. Through the top sector policy, in addition to the deployment of national instruments, the possibilities of the Horizon 2020 programme of the European Commission, the successor of the Seventh Framework Programme, are examined. In the period 2014-2018, the European Commission will make almost € 80 billion available for the stimulation of innovation. Sustainable and efficient transport is one of the issues of the Horizon 2020 programme. To maximize the benefit of the European co-financing, a common and combined demand articulation of all involved parties from the maritime cluster are of utmost importance. Therefore, in close cooperation with the involved parties from the maritime cluster, the national government will share its knowledge and experience with regard to applications. Team IRIS of the Netherlands Enterprise Agency supports the maritime cluster in the participation of the European Horizon 2020 programme for research and innovation.



The maritime cluster needs high quality and properly collaborating knowledge institutes. Specific knowledge of institutes such as the Maritime Research Institute Netherlands (MARIN), Technical Universities and TNO play a key role. It is important that specific maritime knowledge remains easily accessible to departments and industry in the future. In this context, it will also be examined to what extent the reinforcement of maritime fundamental research by the top sector Water and the increase of investments in maritime applied research and the knowledge infrastructure (such as large facilities) are necessary. A knowledge agenda has been drawn up for seaports, in which port-transcending issues have been addressed. Knowledge institute Smart Port bundles academic knowledge into an interdisciplinary port research institute.

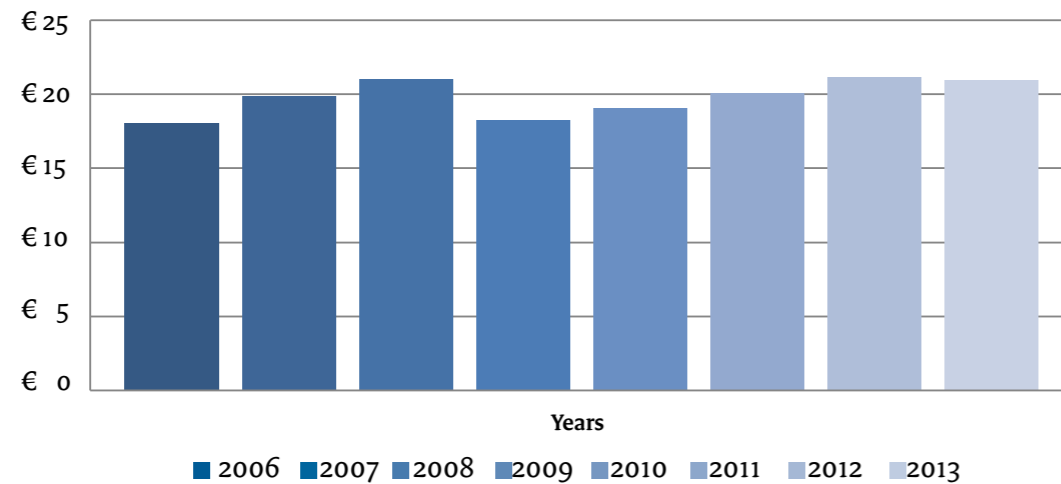
4.3 Trade

The maritime cluster has always had a strong international character. In various areas, the Netherlands plays a leading role on a global level, but in order to keep growing, it has to continue forging strategic alliances. Collaboration between the links: securing, connecting (also through diplomacy), shipping, construction and providing services, offers additional global market opportunities for the Dutch maritime cluster. History has proven this to be true. In addition to a sturdy base of maritime products and services, the Netherlands stands out in maritime niche markets such as tanker shipping for chemicals and special types of vessels (such as utility vessels, shortsea vessels and mega yachts). Particularly in these niche markets, a great amount of specialist knowledge is required and there are possibilities to create even more added value. This offers opportunities for the future.

Export maritime cluster in billion EUR

Source: Maritieme Monitor 2014

Note: excluding port-related transport and non-maritime port activities



In order to maintain the sustainable position in the maritime world top ranking, a favourable business climate is essential and through the presence of new international enterprises and headquarters of maritime businesses, such as shipping companies, the central function of our country can be further strengthened. In Rotterdam, this is already taken up by the Rotterdam Maritime Services Community. Insurers, maritime jurists, financial service providers, commodity traders and other parties focused on providing high-quality port-related maritime services are an important source for the strengthening of an interconnection within the maritime cluster.

For a healthy business climate, it is necessary to continue to invest in aforementioned areas: Human Capital, Innovation, a European and global level playing field, an adequate shipping register, a supporting (financial) instrumentation for export promotion and the prevention of market barriers through the development of free trade agreements.

The national government follows various routes to substantiate a level playing field and where necessary and possible, the efforts will be intensified. This involves the following measures:

- The national government considers it of great importance, that state aid, is based on European guidelines. The purpose of these guidelines is to create a level playing field within the European Union. For the maritime shipping industry, the national government strives for continuity of the existing community guidelines on state aid to maritime transport and, where necessary, for an actualization on the grounds of the current directive and decision-making practices of the European Commission. For Dutch shipping companies, the following tax arrangements apply: tonnage tax scheme or accelerated depreciation scheme and wage costs tax facility.

- These arrangements have been approved by the European Commission based on the Community guidelines on State aid to maritime transport and they contribute to the preservation of the European level playing field. With regard to seaports, there are no guidelines yet, but they have been announced by the European Commission. The Netherlands strive for these guidelines in view of the level playing field between seaports.
- In order to create equal competitive conditions for enterprises, the national government targets unambiguous international regulations. Agreements are established in IMO and CCR framework and increasingly in EU context as well. The national interest of the maritime cluster and the applicability to the specific character of the Dutch fleet always prevail. Subsequently, no national requirements are added on top of international rules, unless this is necessary for clarification or for better tailored legislation, and only if this does not lead to increased burdens.
- Waging on strengthening the national and international cooperation between inspection platforms is essential, because it has become apparent that legislation is not enforced equally in all countries. Therefore, enforcement should be aligned in order to obtain a harmonized interpretation and application of regulations.

Comparative international research has revealed that, in some respects, the Dutch register is less competitive than the registers of other countries. Therefore, the national government is working on a more attractive shipping register with efficient registry and certification procedures.

Through the 'Maritime Hotspots' approach, which is also included in the wider internationalisation agenda of the top sector Water, the maritime industry wants to continue and extend the structural relations with important maritime regions. The government's contribution to a favourable international trade and investment climate continues, through the export instrumentation, the establishment of free trade and investment protection agreements and the involvement of the maritime cluster in, amongst others, trade missions.

In addition, it is examined how the maritime cluster can be part of the new 'Partners for Water' programme for 2016. The new programme can involve projects and activities with a relation to water and delta technology and where aid and trade are concerned.



Export is the key to growth of the Dutch maritime industry. The top sector policy offers Dutch industry an incentive for better international marketing of knowledge and expertise through, amongst others, the involvement of the maritime cluster in trade missions with regard to international promotion. The national government supports the industry on the basis of special needs through a wide network of diplomatic missions and business support offices, also present in smaller countries.

4.4 Accessibility

Optimizing the position of the Netherlands as a logistic hub in Northwest Europe contributes to the further expansion of the significance of our country as a maritime nation. The government and industry face a mutual challenge here. The accessibility of the Netherlands has to be increased, while congestion should be reduced. To accomplish this, all modalities must be deployed, where in particular, the inland waterways and short sea transport offer excellent opportunities.

Therefore, rather than emphasizing the separate modalities, the national government focuses on the importance of integrating maritime transport in the logistical chain. To enable sustainable, reliable, fast, timely and low-cost cargo transport, a seamless transportation network is essential, with secure passages to safe and secured maritime access routes, strong logistic hubs and good hinterland connections, including an optimal connection of the maritime transportation network with the other modes of transportation such as road transport, railways and pipelines. However, it doesn't only involve a good physical connectivity. Administrative harmonisation is just as important. Transport documents deployed by one modality, should not be an obstacle for the continuation of the transport with another modality. Short sea transport still lags behind compared to other intra-EU transport. Through the European Blue Belt Project, the first steps towards the so called European maritime space without barriers have been taken.



Focusing on cargo flows and facilitating them also implies that a greater emphasis is put on the needs and responsibilities of shippers. With choices in terms of accessibility, waterway capacity, operating level and travelling time, this should be primarily considered. More than ever, transport will be dominated by custom made logistical services (including synchro-modality). Responding to the need for innovative logistical concepts provides opportunities to transport industries.



A more resourceful, efficient and innovative use of roads, railways and waterways is the core of the policy initiated by the government with regard to better utilization of existing infrastructure. The target is a 20% decrease of traffic congestions during rush hours, railway growth and better use of the waterways, so that traffic flows smoothly in the Netherlands. In addition, investments are currently being made in infrastructure such as the Blankenburg connection, the Utrecht ring road (A27) and the extended A15. Within the framework of the Multi-annual Programme for Infrastructure, Spatial Planning and Transport (MIRT), research is being performed in regard with the tri-modal freight corridors east and south. Furthermore, investments are being made in locks (sea lock IJmuiden, sea lock Terneuzen, Beatrix lock, Eefde lock, etc.), mooring projects and enhancements of the waterways (such as Twente channels).

A smooth flow of the network is essential for the hinterland connections of the sea ports. As part of the better utilization of existing infrastructure, the national government, local governments and industry will jointly improve the use of the most important (inter)national hinterland connections, as well as achieving a more efficient use of multi-modal hubs and surrounding business parks. For example, because local governments optimize and (re-)allocate business parks located at inland waterways for marine function in order to create opportunities for inland shipping. In addition to a better utilization of the inland waterways, the national government ensures future-proof and reliable waterways and structures through adequate management and maintenance. Where better utilization does not offer a satisfactory remedy, the waterways and structures will be expanded. Good connections and the right companies in the right place contribute to a good maritime competitive position and sustainable logistical solutions.

The role of information and communication technology (IT) is increasingly important in transportation. Since the physical cargo flow is continuously moving faster and more efficiently, the need for faster sharing of information in the transport and logistics sector is increasing. Partly due to that need, a focus shift from cargo flows to information flows is in progress. In the maritime field, the national government wagers on various initiatives, such as the Neutral Logistics Information Platform (NLIP) as part of the top sector Logistics concerning company information and the connection to the maritime policy on government-wide initiatives such as the 'Trade and Transport Single Window' for government information. This not only contributes to an efficient exchange of information, but also to trade facilitation, more effective and efficient government intervention and a reduction of regulatory burdens. Altogether, this results in a substantial reduction of the administrative load. The Maritime Single Window forms part of the Trade and Transport Single Window. Supplementary to the Maritime Single Window, it is essential that the 'Coordinated Border Management' (cooperation of controlling services at the border) is further developed.

On and around Dutch waterways, a lot has been invested on maintenance and improvement of the infrastructure and technical systems. On the user's side, time has not stood still either. Technological developments, such as IT navigation and Automatic Identification Systems have helped the users in inland shipping, provided they have the correct information at their disposal, to autonomously make decisions on safer, faster and more efficient participation in shipping traffic. At the same time, there's an increase in traffic intensity, more complex cargoes, multiple use of space at sea and a more intensive use of the waterways infrastructure. Therefore, the national government strives to deliver or have delivered customized support, as much as possible, in respect to obligations concerning the use of the nautical services. This means that when imposing obligations in the field of nautical services, the safety profile of the waterway user and the local conditions will be taken into maximum account, thereby preventing unnecessary costs in relevant cases.

Moreover, due to increased IT applications there are more possibilities for market parties to meet the user's need for (specific) traffic and travel information through reuse of government information. Thus, supply and demand can be optimally aligned. Until now, the provision of vessel traffic and travel information has been a governmental task. The government is prepared to examine which information tasks it is able to shed.

4.5 Safety and the Environment

Safety and the environment are important prerequisites for the economic growth possibilities of the maritime cluster. Only a safe, environmentally friendly and sustainably operating maritime cluster can continue to live up to its economic potential. Clean seas and inland waterways contribute to the improvement of the quality of life of local residents around the ports and to the development space of those same ports. Relentless efforts by government and industry, for a safer, more environmentally friendly and sustainable development of the shipping industry, both nationally and internationally are therefore indispensable⁶.

Partly due to a higher traffic intensity and multiple use of space in the coastal areas and on the inland waterways, the safety risks will increase. This means that spatial development on the water and related international coordination is increasingly important. Especially due to spatial pressure that may arise through the construction of offshore wind parks, it is essential to monitor safe and efficient handling of the shipping traffic. The increasing spatial pressure in the waterways needs to be anticipated, not only in view of the protection of people and the environment, but also as a precondition for a strong competitive position. Over the past decennia, the national government has established a safety-focused, executive and enforcing framework for the occupational and recreational waterway traffic. Therefore, the responsibility for further enhancement of the safety now lies with the industry and individual users, through the use of a professional safety culture and a proper compliance with laws and regulations. Special attention is required, particularly for the reduction of the

⁶With regard to the spatial planning of the shipping traffic on the North Sea, the Policy Note North Sea 2009 – 2015 and its successor Policy Note North Sea 2016 – 2021 offer the framework.



human factor in accidents and incidents. Continuous focus to both safety and sustainability is essential in nautical education and research.

At environmental level, the challenge lies in the reduction of emissions and in the promotion of sustainable use of the sea and seaports. The expected growth in transport, the anticipated decline of fossil fuels and raw materials and the tightening of the international environmental legislation will require additional efforts by the maritime cluster. The national government wants to support these efforts, such as the pursuit of 'zero emission vessels', by eliminating legal barriers for innovation, enabling the vessels and their activities to become cleaner and safer (including the use of alternative fuels, and alternative mooring systems)⁷. Incentives such as Green Award and the implementation of the European Clean Power for Transport Directive and the Energy agreement for Sustainable Growth also contribute to the achievement of the environmental objectives.

⁷MVO Nederland strives for silent, emission-free and fully recyclable sea vessels under the initiative 'Grensverleggers in de Maritieme Sector' (Trailblazers in the maritime sector).

4.6 Security and Stability

The rise of new geo-political and economic power, shifting international power relations and such as cross-border crime (including piracy), illegal migration, cyber security, proliferation of (parts of) mass destruction weapons and terrorism have led to a more obscure and unpredictable world. Internal and external security, including in the maritime domain, are becoming increasingly conjoined.

Within this global security shell, trade largely takes place through sea routes, the so-called 'Sea Lines of Communication' (SLOCs). Interruption of SLOCs can be directly disruptive to the cargo flows, whereas bottlenecks in the SLOCs ('Choke Points') are especially vulnerable for disruptions. This also affects the vital interests of the Netherlands because of its position at important sea routes and the necessity of an unhindered supply of raw materials and cargo through the maritime domain. New shipping routes and sea areas, which are becoming more important in an economic sense, such as the Arctic region, could increasingly require our attention in the coming decennia ⁸.

Representing the vital interests of the Netherlands and the physical safety of its residents requires continuous efforts from the public and private actors. The national government contributes through diplomacy and international law in order to provide possibilities to promote and uphold the international legal order. The Royal Netherlands Navy fulfils an important role in the protection of the Dutch (economical) security interests in the maritime domain worldwide, through deterrence, prevention or combating threats (use of force).

Threats of Dutch maritime interests at sea and in coastal areas require cooperation between civilian and military maritime actors, both nationally and internationally. Crucial conditions are collective image-building, effective exchange of information, coordination and aligning actions and measures, which is increasingly taking place between coastguards and naval forces.

Depending on the nature, intensity and the location of a threat, actions are taken at national level, in the EU framework, in cooperation with NATO or UN, or in ad hoc coalitions. With the policy note 'International Security' for the actualization of the International Security Strategy and the note 'In the Interests of the Netherlands' as a basis, the United Nations Convention on the Law of the Sea (UNCLOS), the NATO Maritime Strategy and the EU Maritime Security Strategy are important frameworks for actions at relevant international levels. In view of the consolidation of sustainable development and for the prevention of instability and conflicts, the deployment of the Royal Netherlands Navy can contribute to capacity building on one hand, and for support of diplomacy and industry on the other. The deployment of the Navy can also serve the purpose of containing crisis situations or serious crime, such as combating piracy ⁹ or drug smuggling and for the prevention of human trafficking. In worst case scenarios, the Royal Netherlands Navy is equipped to protect the shipping industry during conflicts or crisis situations, to keep the maritime routes (SLOCs) open and to keep the maritime infrastructures accessible. Through acting at an international level, higher degrees of effectiveness and solidarity can be achieved, political ties can be strengthened and the protection of shared interests can become more effective.

⁸ With respect to the Arctic region, the Cabinet's response to the advice of the Advisory Council on International Affairs (advice no. 90, October 2014) will be offered to the House of Representatives at the start of 2015.

⁹ With regard to armed private security on board Dutch ships, the Cabinet will offer a policy statement to the House of Representatives at the start of 2015.



5

Policy Agenda

The policy agenda below states the measures necessary for the realisation of the ambitions of the government-wide policy per policy area. Each measure identifies the involved parties and turnaround time of the measure.

This policy agenda will be further specified and elaborated during the planned interdepartmental consultations. For the purpose of the further elaboration of the policy agenda, the national government will establish a dynamic work programme where needed, on the basis of which it will enter into a dialogue with the parties of the maritime cluster. For the seaports, the 'Work Programme Seaports 2014–2016' has already been agreed upon between the national government, port authorities and the port industry in 2014. The actions in this work programme are consistent with the objectives of the maritime strategy. Components of this policy agenda are implemented through the agendas of the top sector policy.



Human Capital

Knowledge and Experience

Actions Government, Industry and Knowledge and Educational Institutions

In consultation with industry and knowledge and educational institutions, the government will examine and, where necessary, plead internationally, whether a larger part than the required apprenticeship sailing time for nautical students can be replaced with a more intensive use of modern technology such as simulators. For inland shipping will be considered whether a simulator can be used in the context of a practical exam for the commercial vessels master's certificate. The maritime-technical (manufacturing and offshore industries) and nautical education is of high quality and will be optimally adapted to the needs of the innovations in the maritime cluster. Where needed, curricular continuity will be strengthened (lower secondary vocational education, senior secondary vocational education and higher education). In the Work Programme Seaports, an adjacent action has been implemented in order to secure the connection of the labour potential in the cities to the (future) needs of the ports. With the Human Capital Agendas, the top sectors Water and Logistics are working on the challenges of finding sufficient qualified personnel.

Driver

Ministry of Education, Culture and Science

Involved parties

Ministries of Infrastructure and the Environment, Economic Affairs, Defence, Maritime by Holland, Knowledge and Educational institutions, Branch Organizations, Industry, Labour Unions, Top sectors Water and Logistics

Tijdvak

Ongoing

Attractive Maritime Profession

Actions Industry

The industry will encourage young people to choose for a maritime profession and they will provide current and future employees career prospects and development opportunities. The national government will contribute to the choice of maritime professions by financing maritime introductory internships for the period 2015 – 2018.

Driver

Maritime by Holland

Involved Parties

Branch Organizations, Industry, Ministries of Infrastructure and the Environment, Economic Affairs, Defence, Educational Institutes, Top sectors Water and Logistics

Timeframe

Ongoing

Labour Mobility
Action Government

In order to simplify the transition between the maritime professions, the government will raise the issue of obstacles for labour mobility at an international level and remove these obstructions in national regulations and legislation where possible.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Ministry of Infrastructure and the Environment	Ministry of Defence, Educational Institutes, Branch Organizations and Labour Unions	Ongoing



Innovation

Benefitting the Potential of European Co-financing
Action Industry and Government

The industry and government will make joint efforts to enhance to possibilities of (co-)financing of innovative projects, amongst others by ensuring that innovative goals of the maritime cluster are implemented in national and European regulations for research and development. Maritime by Holland and the branch organisations ensure a bundled research questioning in the field of innovation financing. Team IRIS of the Netherlands Enterprise Agency supports the maritime cluster in the participation of the European Horizon 2020 programme for research and innovation.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Maritime by Holland and Branch Organizations	Ministries of Economic Affairs, Infrastructure and the Environment, Defence, Maritime Knowledge Institutes, Industry, Top Sectors Water and Logistics	Ongoing

Stimulating and Removing Legal Barriers for Innovation
Action Government and Industry

As a launching customer and commissioner of innovations in the maritime cluster, the government will stimulate (for example by commissioning a solution instead of a specific product) and remove barriers for innovation in regulation and legislation. Within the international context, the government will offer as much room for experimentation as possible to enable innovative solutions and link this to fast processes of approval. The industry will indicate concretely which barriers they encounter and inform the government of new developments that do not fit within existing regulations at an early stage.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Ministry of Infrastructure and the Environment	Ministries Economic Affairs, Education, Culture and Science, Defence, Social Affairs and Employment, Branch Organizations, Industry and Labour Unions	Ongoing

Trade

Ensuring a Level Playing Field

Action Government and Industry

At a European level, the government will work on the establishment of state aid guidelines for seaports. An evaluation of the fiscal measures in the maritime shipping policy has taken place in 2014.¹⁰ It was concluded that there is a discussion regarding the qualification of work and service vessels for the tonnage tax scheme. The Cabinet's reaction¹¹ states that this will be reviewed. As far as there will be a shift in the fiscal package, it will be under the budgetary constraints that apply to the current fiscal measures. In the establishment of international measures, the government will take the special nature of the manufacturing industry into account to ensure that no unenforceable decisions are taken and to avoid further detrimental for the Dutch fleet in relation to the European and respectively, the global fleet. In the context of optimizing the chain 'policy-implementation-enforcement' and in line with the Cabinet's reaction to the Netherlands Scientific Council for Government Policy (WWR) report 'Supervising public interests' there is a collaboration in the initiative of the Confederation of Netherlands Industry and Employers (VNO-NCW), the Royal Association MKB-Nederland (SME's) and the Dutch Federation of Agriculture and Horticulture (LTO Nederland) 'Action Plan at the Table – Together towards a better, smarter and more efficient supervision'. Supervisors, departments and the industry will cooperate to find pragmatic solutions, better coordination between supervisors and new inspection arrangements that take into account the risks and responsibilities of public and private parties. The government will promote the strengthening of national and international cooperation between enforcement and investigative services in order to obtain a harmonised supervision and a harmonised interpretation of the regulations.

Driver	Involved Parties	Timeframe
Ministry of Infrastructure and the Environment	Ministries of Finance, Social Affairs and Employment, Security and Justice, Foreign Affairs, Branch Organizations, Industry, Supervisors, Port Authorities	2015 – 2020

¹⁰ Evaluation of the fiscal measures; <http://www.rijksoverheid.nl/documenten-en-publicaties/rapporten/2014/09/18/evaluatie-zeevaartbeleid-2008-2013.html>.

¹¹ Letter 13 October 2014, feature IENM/BSK-2014/220443.01; <http://www.rijksoverheid.nl/documenten-en-publicaties/kamerstukken/2014/09/18/aanbiedingsbrief-bij-het-rapport-evaluatie-zeevaartbeleid.html>.

An Attractive Shipping Register

Action Government and Industry

The government will organize a more efficient registry and certification of sea going vessels, so that the quality is comparable to that of other important shipping registers, including faster registration and certification procedures. A prerequisite is that application procedures, explanatory notes, web portals, etc. are clear and consistent and that the industry provides the necessary data promptly and correctly. A more flexible payment regime is also pursued. The government is responsible for providing information on the interpretation of nautical regulations and existing information channels and means will be improved. When establishing new regulations, the government and the branch organizations will examine whether joint efforts such as seminars are desirable. In addition, branch organizations will provide their members with additional information on existing regulations.

Driver	Involved Parties	Timeframe
Ministry of Infrastructure and the Environment	Branch Organizations, Industry	2015 – 2017

Promotion of the Maritime Cluster Abroad

Action Industry and Government

The maritime cluster is promoted abroad through the branding "Maritime by Holland". When and where necessary, the government will support this international promotion from the top sectors, the Netherlands Enterprise Agency, the Netherlands Foreign Investment Agency (NFIA) (in terms of attracting foreign (maritime) companies), the mission network in collaboration with the Netherlands Business Support Offices (in terms of economic diplomacy and trade and investment promotion) and the Royal Netherlands Navy (concerning fleet visits). In the promotion of the maritime cluster concerning the water sport industry, connections are sought with the marketing activities of the Hospitality Sector and the Netherlands board of Tourism and Conventions (NBTC). Through top sector structures, the government will also include the maritime cluster in trade missions. Under the direction of the NFIA and in cooperation with the branch organizations and other (local) parties, the current locations of other acquisition options in countries such as Greece, Sweden and Cyprus will be mapped. Subsequently, also under NFIA direction and in cooperation with branch organizations and other (local) parties, targeted actions can be established and executed.

Driver	Involved Parties	Timeframe
Maritime by Holland	Ministries of Foreign Affairs, Defence, Economic Affairs, Infrastructure and the Environment, Education, Culture and Science, NFIA, Branch Organizations, Industry, Knowledge and Educational Institutions, Top sectors Water and Logistics	Ongoing

Accessibility

Chain Optimization and Nautical Services

Action Government and Industry

In consultation with the government, the industry will continue the efforts to achieve a seamless logistic transport network and integration of maritime transport in the logistical chain. In this framework, cargo flows will be centralized more than before regarding decisions in the areas of accessibility and utilization. In addition to the broadening of the current connectivity, with the contribution of research to the freight corridor East and South in the framework the Multi-annual Programme for Infrastructure, Spatial Planning and Transport (MIRT), an administrative connectivity will be targeted. This includes the harmonization of transport documents between the different transport modalities. Special attention will be paid to short sea shipping. In the area of nautical services, the government, in cooperation with the industry, intends to offer more room for innovation and customization. In this context, the functionality of the current instruments for nautical services will be reassessed. Market parties will be offered a wider range of possibilities to foresee in travel and vessel traffic information by reuse of government information. In accordance between the national government and local waterway authorities, both for recreational and commercial navigation, the possibilities of optimization of better utilization of the national waterway network (both main transport axes and smaller waterways) will be examined.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Ministry of Infrastructure and the Environment	Ministry of Defence, Maritime by Holland, Top Sector Logistics, Branch Organizations, Industry, Local Governments	2015 - 2020



Safety and the Environment

Adequate Regulatory Framework

Action Government

The government and industry will strive for a modern and adequate international regulatory framework for safer, more environmentally friendly and sustainable development of shipping and ports. The government will make efforts to implement new legislation promptly, strive for a well-functioning chain of policy, implementation and enforcement and where possible, adapt to international developments for new regulations. Where possible, the government will also reduce the regulatory burden.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Ministry of Infrastructure and the Environment	Ministries of Social Affairs and Employment, Defence, Branch Organizations, Inspectorates, Industry, NGO's, Labour Unions	Ongoing

Safety Culture

Action Industry and Government

The industry will operate on a basis of a professional safety culture. Concerning maritime shipping, the industry, in cooperation with the government, will strive for a permanent position in the top 10 of the Paris MOU on Port State Control for Dutch flagged vessels. In nautical education there will be more focus on safety awareness and sustainability. The industry and the waterway users will work on a decrease of the human factor in accidents, thus preventing personal and economic damage as much as possible. In this context, it will also be examined whether the registration of the waterway users and the accidents statistics need improvement.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Branch Organizations and Industry	Ministries of Infrastructure and the Environment, Social Affairs and Employment, Defence, Inspectorates, NGOs, Knowledge and educational institutions, Labour Unions	Ongoing

Sustainability

Action Industry, Seaports and Government

The government will support the pursuit of 'zero-emission vessels' by removing obstacles in concerning legislation and regulations. The seaport authorities and the port industry, in collaboration with the government, will establish a joint Energy Action Plan in order to facilitate the implementation of the national Energy Agreement for Sustainable Growth.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Branch Organizations and Industry	Ministries of Infrastructure and the Environment, Defence, Maritime by Holland, Top Sector Water, Seaports, NGOs, Knowledge Institutions	Ongoing

Security and Stability

Effective Information-Exchange

Action Government

As part of the management of vital interests and deterrence, prevention and combat of possible threats, the government focuses on optimal information exchange as part of an effective cooperation, both interdepartmentally and internationally. The government facilitates the provision of adequate forms of protection against piracy and other forms of crime at sea. The ministry of Defence plays an important role in the field of linking information from civil and military systems.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Ministry of Defence	Ministries of Infrastructure and the Environment, Foreign Affairs, Security and Justice, Coastguard (Netherlands and the Caribbean Area), Maritime by Holland, Branch Organizations, Industry, Labour Unions.	Ongoing

Communication

Consistent and Cluster-Wide Communication

Action Industry and Government

It is advisable to communicate consistently on the maritime cluster during lobby and export activities, both nationally and internationally, amongst others to attract young people's interests to a maritime profession and to represent interests in international regulatory organizations and foreign maritime markets. For the economic indicators, the government, in cooperation with industry, implements the Maritime and (inland) Port Monitor. Maritime by Holland will provide the 'branding' for the entire maritime cluster.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Maritime by Holland	Ministries of Infrastructure and the Environment, Economic Affairs, Foreign Affairs, Defence, Industry, Branch Organizations, Top Sectors Water and Logistics	Ongoing

Establishing a Knowledge Agenda

Action Government and Industry

Proper execution and monitoring of the ambitions of the maritime strategy requires specific knowledge. Following the already established knowledge agenda for seaports, additional knowledge issues related to the execution and implementation of the maritime strategy will be considered. It is important to communicate this knowledge through the breadth of the entire cluster.

<i>Driver</i>	<i>Involved Parties</i>	<i>Timeframe</i>
Ministry of Infrastructure and the Environment	Ministries of Economic Affairs, Foreign Affairs, Defence, Social Affairs and Employment, Education, Culture and Science, Maritime by Holland, Industry, Branch Organizations, NGO's, Labour Unions, Knowledge Institutions	2015



Annex

Economic Indicators Maritime Industries

Added Value Maritime Industries (in million EUR)

Employment Maritime Industries (in persons employed)

Export Maritime Industries (in million EUR)

Economic Indicators Maritime Industries

Added Value Maritime Industries (in million EUR)

Industry	2006	2007	2008	2009	2010	2011	2012	2013
Maritime shipping	3,122	3,150	3,182	2,267	2,082	1,718	1,770	1,603
direct	2,220	2,240	2,164	1,541	1,281	1,057	1,089	986
indirect	903	910	1,019	726	801	661	681	617
Ship building	2,420	2,805	2,784	2,707	2,420	1,862	1,834	1,983
direct	1,265	1,467	1,391	1,295	1,309	1,007	992	1,072
indirect	1,155	1,339	1,393	1,412	1,111	855	842	911
Offshore	2,934	3,203	3,316	3,235	3,363	3,488	3,544	3,720
direct	1,870	2,049	2,104	2,049	2,130	2,210	2,245	2,357
indirect	1,063	1,154	1,212	1,186	1,233	1,279	1,299	1,364
Inland shipping	1,366	1,463	1,566	1,331	1,502	1,656	1,627	1,593
direct	1,009	1,083	1,138	992	924	1,019	1,001	980
indirect	357	381	428	338	578	637	626	613
Dredging	956	1,039	1,112	1,205	1,248	1,142	1,231	1,194
direct	500	544	617	643	631	578	623	604
indirect	456	495	496	561	617	564	608	590
Navy	946	940	939	993	919	911	797	843
direct	709	703	692	721	666	660	578	611
indirect	237	237	247	272	253	251	219	232
Fishing industry	669	729	607	568	378	353	360	331
direct	482	521	408	381	293	274	279	257
indirect	187	208	198	187	85	79	81	74
Maritime services	1,104	1,194	1,226	1,208	1,238	1,310	1,328	1,315
direct	821	886	910	883	906	958	971	962
indirect	283	308	316	325	332	352	357	353
Water sport industry	1,533	1,793	1,860	1,833	1,480	1,434	1,397	1,395
direct	881	1,029	1,025	971	934	904	881	880
indirect	652	764	835	863	547	530	516	515
Maritime suppliers	2,335	2,774	2,798	2,738	2,280	2,376	2,395	2,482
direct	1,578	1,869	1,850	1,777	1,559	1,625	1,638	1,697
indirect	757	905	949	961	721	751	757	785
Ports*	33,394	36,152	38,863	32,518	32,194	33,769	35,544	37,040
direct	21,960	23,532	25,223	20,351	20,981	21,594	22,460	22,242
indirect	11,434	12,620	13,640	12,167	11,213	12,175	13,084	14,798

*Including port-related transport and non-maritime port activities (Source: Havenmonitor 2013, EUR)

Source: Maritieme Monitor 2014, Ecorys

Economic Indicators Maritime Industries

Employment Maritime Industries (in persons employed)

Industry	2006	2007	2008	2009	2010	2011	2012	2013
Maritime shipping*	12,624	12,568	12,986	12,500	12,173	12,759	13,213	13,796
direct	6,889	6,855	6,855	6,708	6,561	6,877	7,122	7,436
indirect	5,735	5,713	6,131	5,792	5,612	5,882	6,091	6,360
Ship building	23,499	23,535	22,939	22,130	23,331	21,485	22,637	22,899
direct	12,172	12,041	11,982	11,708	11,553	10,639	11,209	11,340
indirect	11,327	11,494	10,958	10,422	11,777	10,846	11,427	11,560
Offshore	38,357	38,750	40,059	39,099	39,495	39,934	41,256	43,750
direct	23,849	24,053	24,722	24,271	24,519	24,791	25,612	27,160
indirect	14,508	14,697	15,337	14,828	14,976	15,143	15,644	16,590
Inland shipping	17,215	17,550	17,582	17,191	25,085	25,935	26,093	25,236
direct	13,394	13,563	13,553	13,289	13,521	13,979	14,064	13,602
indirect	3,820	3,987	4,029	3,902	11,564	11,956	12,029	11,634
Dredging	13,370	13,876	14,566	14,508	13,390	13,836	14,454	14,284
direct	5,392	5,599	5,875	5,852	5,921	6,118	6,391	6,316
indirect	7,978	8,277	8,691	8,657	7,469	7,718	8,063	7,968
Navy	18,580	18,590	18,470	18,580	21,886	21,157	20,589	19,060
direct	14,420	14,290	14,270	14,250	14,120	13,650	13,283	12,297
indirect	4,160	4,300	4,200	4,330	7,766	7,507	7,306	6,763
Fishing industry	3,935	3,932	3,772	3,673	2,947	3,147	3,137	3,124
direct	2,326	2,312	2,269	2,242	2,135	2,280	2,273	2,263
indirect	1,609	1,620	1,503	1,431	812	867	864	861
Maritime services	14,459	14,682	14,850	14,492	14,554	14,835	15,070	15,168
direct	10,674	10,808	10,964	10,785	10,830	11,040	11,214	11,287
indirect	3,785	3,874	3,885	3,707	3,724	3,796	3,856	3,881
Water sport industry	23,139	23,986	24,404	24,093	21,621	20,866	20,472	20,307
direct	13,071	13,553	13,789	13,585	13,199	12,738	12,498	12,397
indirect	10,068	10,433	10,615	10,508	8,422	8,127	7,974	7,910
Maritime suppliers	22,196	22,924	23,993	23,038	21,778	21,777	22,305	22,906
direct	15,032	15,362	16,113	15,715	14,862	14,861	15,222	15,632
indirect	7,164	7,562	7,880	7,323	6,916	6,915	7,083	7,274
Ports**	310,731	326,819	328,413	325,591	311,812	315,663	324,123	325,825
direct	159,593	164,297	166,945	169,237	163,429	164,284	170,500	170,489
indirect	151,138	162,522	161,468	156,354	148,383	151,379	153,623	155,336

*This concerns both Dutch seafarers and employees working on shore. The total number of seafarers on board Dutch flag vessels (Dutch and non-Dutch) amounts to over 28.000 in 2013.

** Including port-related transport and non-maritime port activities. (Source: Havenmonitor 2013, EUR)

Source: Maritieme Monitor 2014, Ecorys

Economic Indicators Maritime Industries

Export Maritime Industries (in million EUR)

Industry	2006	2007	2008	2009	2010	2011	2012	2013
Maritime Shipping	4,949	5,319	5,622	4,323	4,539	4,596	4,920	4,762
Ship building	1,494	1,598	1,707	1,517	1,658	1,670	1,666	1,310
Offshore	1,559	1,586	1,816	1,721	1,927	2,150	2,229	2,260
Inland shipping	954	1,025	1,116	919	951	964	1,032	999
Dredging	1,062	1,202	1,412	1,330	1,326	1,239	1,496	1,562
Navy	0	0	0	0	0	0	0	0
Fishing industry	461	495	478	425	417	420	410	366
Maritime services	211	226	243	228	235	259	265	276
Water sport industry	785	824	881	835	821	823	813	820
Maritime suppliers	1,695	2,004	2,005	1,948	1,854	1,977	2,028	2,096
Ports*	5,338	6,057	6,260	5,492	5,792	6,384	6,777	7,004

* Excluding port-related transport and non-maritime port activities

Source: Maritieme Monitor 2014, Ecorys

Colophon:

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