



STUDY ON BLUE GROWTH AND MARITIME POLICY WITHIN THE EU NORTH SEA REGION AND THE ENGLISH CHANNEL

CLIENT: **DG MARITIME AFFAIRS AND FISHERIES**

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NETHERLANDS



Background

The North Sea coastline of the Netherlands is about 350 kilometres long with about 2.5 million people living in the four maritime regions.

The main economic maritime activities are geographically divided into four regions:

- Northern sea ports (Delfzijl, Harlingen, Den Helder);
- North Sea Canal (Amsterdam and surroundings);
- Rhine and Meuse (Rotterdam and surroundings); and
- Scheldt basin (Vlissingen and Terneuzen).

Maritime economic activities

The Netherlands has a diversified maritime economy, as no single activity is mentioned across all three categories (largest, fastest growing and most promising).

Coastal tourism is a mature sector which is high in terms of GVA and employment figures as well as development potential. It is expected that the number of non-European tourists will continue to grow in the future, while the number of tourists from the south of Europe (Spain, Italy) is expected to decrease due to the economic crisis.

Table 1.1: Listing the 7 largest, fastest growing and most promising maritime economic activities in the Netherlands at NUTS-0 level

Rank	Largest maritime economic activities	Fastest growing maritime activities	Most promising maritime activities
1.	Coastal tourism	Shipbuilding and ship repair	Construction of water projects
2.	Offshore oil and gas	Construction of water projects	Coastal tourism
3.	Yachting and marinas	Passenger ferry services	Shipbuilding and ship repair
4.	Catching fish for human consumption	Catching fish for human consumption	Short-sea shipping (incl. ro-ro)
5.	Inland waterway transport	Aggregates mining	Inland waterway transport
6.	Short-sea shipping (incl. ro-ro)	Offshore wind	Offshore oil and gas
7.	Deep-sea shipping	Ocean renewable energy	Offshore wind

Note: Cells in colour represent the most maritime economic activities which are prominent in more than one category.

Regional level activities

The most important maritime regions in The Netherlands are Zuid-Holland and Noord-Holland. Two large ports (Rotterdam and Amsterdam) are located in these regions. The presence of deep-sea shipping, short-sea shipping and inland waterway activities in these regions attract and reinforce other economic activities such as ship repair, offshore activities, maritime services and marine monitoring and surveillance.



Zuid-Holland is particularly strong in shipping and shipbuilding activities, while for offshore oil and gas and coincidentally coastal tourism activities are focused to the highest degree around Noord Holland.

Clusters

Three clusters have been identified in the Netherlands, two of which are located in the port regions of Rotterdam and Amsterdam and one 'shipbuilding cluster' in the Northern Netherlands.

The port clusters consist of port activities, shipping and inland shipping activities maritime services and ship repair activities. Rotterdam is the largest port cluster, with over 70,000¹ persons employed directly or indirectly in the maritime economy.

Amsterdam is also a cluster of substantial size, with 40,000² persons employed directly or indirectly in the maritime economy. Shipbuilding is the core of the cluster in the Northern part of the Netherlands, suppliers and ship operators are included in the cluster. All three clusters have a mature status and contain similar or interlinking activities. This provides considerable concentration of expertise. At the same time, weaknesses such as access to skilled labour are also present.

National strategies and policies

The main national maritime policy in the Netherlands focuses on providing a safe, sustainable and economically strong maritime industry. The national maritime strategy for the coming 10 years aims to further develop the sectors' strong international position. The following four innovation themes have been selected:

- Deep sea mining and sustainable energy production on sea;
- Sustainable ships (alternative fuel, fuel savings, emission reduction);
- Smart ships (reduction of staff and maintenance costs, increase functionality and use of platforms, safe ships and platforms);
- Smart harbours (improvement cargo processing, port development).

In addition to the national strategy, regional and local level initiatives also exist focusing on overarching themes as well as specific industrial activities. Multiple organisations such as local governments (provinces) and the larger port authorities have developed a strategy for the North Sea and/or the coastal area.

The provinces of Zuid-Holland and Noord-Holland have specifically developed a strategic agenda for the coastal area. They pay attention to a broad range of themes, including coastal protection, recreation and nature values. Within the strategy, the need for public intervention is assessed as well. For example, the current and desirable trade-off between different types of recreational use and nature values at the coastline is identified.

¹ Information from the Port of Rotterdam, <http://www.portofrotterdam.com/en/Brochures/Facts-Figures-Rotterdam-Energy-Port-and-Petrochemical-Cluster-Eng.pdf>

² Taylor and Francis Group (2002): Clustering and performance: the case of maritime clustering in The Netherlands, http://acrbw.com/files/uploads/20080707001444maritime_clusters_holland.pdf