



ANNUAL REPORT 2017

# Protectionism

An Obstruction  
to World-Class  
Added-Value



EUROPEAN DREDGING ASSOCIATION





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“EuDA is the official interface  
between the European Dredging  
Industry and the European  
Institutions”

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## Protectionism is an Obstruction to Market Access and Level Playing Field

In markets where all companies compete under the same rules, the fittest companies grow stronger and more resilient. These companies need to continuously work on searching for competitive advantages to keep ahead of the competition. In markets where protectionism distorts competition, the advantage can simply be the access to the market, protected from outside competition. Access and other forms of support are artificially given to a biased selection of companies, usually incapable of surviving without protection.

## MESSAGE FROM THE BOARD

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After the transition year of 2016, 2017 is certainly a new start for EuDA and for the European economy showing signs of recovery. Following in the footsteps of Marc Stordiau at the helm of the Association, it is a great honour for me to chair the European Dredging Association. It is also a great pleasure for me to give back to this exciting and challenging sector some of what it has given to me, during my entire career.

2017 was marked by the after-shocks of Brexit and increasing self-centrism in the US geopolitics. With each passing day we receive confirmation that Brexit will be more a lose-lose game rather than a win-win or win-lose as it was initially and deceptively sold to the British people. The same goes with the battery of announced protectionist measures that will probably not succeed in making America great again but only start a trade war that will impact all markets. There are objective reasons as to why good trading relationships with one's neighbours and/or economic allies are so important for economic development, growth and prosperity. Asymmetric relationships providing one-sided benefits are not tenable in the long term.

The theme of the EuDA 2017 Annual Conference, entitled "*Protectionism: Medicine to the wrong illness or Poison Pill?*", was chosen to reflect on these serious concerns. With inspiring speakers addressing them,

our esteemed audience was made aware more than ever that Europe is under economic threat from the East (more specifically from the Far East), from the West (back to some sort of wild West), but also from within, from the inside of the EU of which Brexit is a mere symptom. Europe is clearly hindered to collect the full benefits of globalisation with still too low economic growth and high unemployment rates. Politicians in Europe need to close ranks and work towards (re)unification behind a common goal: the prosperity and well-being of the European citizens. But can this be meaningfully achieved without healthy and prosperous European companies? Certainly not. This is why the European politicians should work towards a comprehensive European Industrial Policy whereby the basic conditions for European companies to grow and prosper, including global level playing field and unhindered access to markets, can be established and nurtured. Long-term asymmetric trade relations are bad for the European economy and should be rebalanced with the introduction of reciprocal treatment, forcefully restoring a symmetric trade relationship where the treatment of the non-EU companies inside the EU are replicating the treatment of EU companies in these same non-EU countries. The case of the EU-China trade relationship needs special attention in this matter as China has benefited from an asymmetric trade relationship for more than 20 years

and has officially failed (or so far refused) to rebalance the relationship. Time for action has come.

During 2017, the European Dredging Association (EuDA) has focused its efforts on the following subjects:

- 1) European Commission's Maritime Initiatives;
- 2) the EuDA CO<sub>2</sub> Strategy;
- 3) the trade relations inside and outside the EU.

### 2017 European Maritime Year

2017 was designated as the European Maritime Year and was opened by Commissioner Violeta Bulc on the occasion of the second European Shipping Week. This provided an opportunity for the Commission to put forward the maritime issues and policies, make them more visible and receive higher priorities.

Thanks to this increased visibility, significant progress could be achieved regarding maritime issues, including the necessary modernisation of its infrastructure. Milestone legislation was voted in Europe, such as the

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**“Asymmetric relationships provide one-sided benefits and are not tenable in the long-term.”**

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## 2017 Members of the EuDA Board

Alan Lievens  
(Chairman)



Jeanette Rohde  
(Vice Chairman)



Peter van der Linde  
(Treasurer)



Mieke Fordeyn



Govert van Oord



Jens Schmidt



Kees van de Graaf jr.



Éric Tancré



Edwin Lokkerbol



Ports Services Regulation. In IMO, with the milestone decision to monitor CO<sub>2</sub> emissions from shipping was adopted and the benchmarks to achieve the objectives of the Paris Agreement were established.

### **EuDA CO<sub>2</sub> Strategy**

Already in 2008 EuDA established a EuDA CO<sub>2</sub> Strategy and has ever since worked to improve and implement it. In 2012, EuDA finalised a first version of its common CO<sub>2</sub> Strategy. The EuDA CO<sub>2</sub> Strategy aims to improve the members' and their clients' understanding of the CO<sub>2</sub> emissions from the EuDA dredging fleet. In 2016, EuDA completed a milestone report on an industry-backed method to calculate typical emissions from Trailing Suction Hopper Dredgers working on a dredging project. In 2017 it was finally published and shared with several administrations and organisations.

### **The Trade relationships inside and outside the EU**

Building on the momentum created by the Transatlantic, Trade and Investment Partnership (TTIP) between the EU and the US that is now at a stop, EuDA pursued its work

with the US and revised its strategic approach. In 2017, EuDA focused on amending the 1906 US Dredging Act (preventing any foreign competition in the US dredging market). Working very closely with the Benelux Embassies and the EU representation, EuDA contributed to the success of a Study Tour on the EU Water Management for selected High-Level US representatives.

Also inside Europe's borders, EuDA has to make an effort to keep open the open markets and to open the closed ones. The Ports' Regulation, which was finally adopted in February 2017, is considered by EuDA as a missed opportunity to further improve the access to EU dredging markets.

As discussed during our Annual Conference, protectionism can be seen as a poison pill. It is a contagious disease that needs to be stopped from spreading from one country or market to another.

**With our best regards, Alan Lievens, Chairman and his colleagues of the Board of EuDA.**

*Since the 1<sup>st</sup> of January 2017, Alan Lievens became Chairman of the European Dredging Association (EuDA).*

*Alan Lievens holds a degree in civil engineering from Ghent State University and speaks fluently Dutch (mother tongue), French, English and Spanish.*

*Alan Lievens started his career in the mid-seventies and immediately started to work for the company Jan De Nul. He worked all over the world, doing projects in China (Jiuzhou, 1985), in the Mediterranean and Middle East as well as in the Baltic Sea. Very soon though he became a specialist of Latin America and managed dredging projects in Brazil, Argentina, Dominican Republic, Jamaica, Honduras, etc. He was Area Director for the Americas, West Mediterranean and the Caribbean for the Jan De Nul Group when he retired in 2015.*

*He first joined EuDA in 2014 and helped the Task Group for US Market Access devise a strategy to try and open the US market. His drive on and experience with trade issues will certainly prove to be an asset for the coming challenges of the European dredging industry.*



Protectionism  
is an Obstruction to  
World-Class Innovations and  
State-of-the-Art Added-Value

By restricting access of non-domestic competition to their market or providing their domestic companies with artificial (unfair) competitive advantages, protectionist measures keep competitors out but also restrict or prevent the entry of world-class innovations or knowledge into their market.

## RESEARCH AND DEVELOPMENT

### European Dredgers Innovating around the world

Where the global markets are open, the European dredgers can keep growing in their high-tech high added-value maritime market segments and maintain their global leadership only by innovating faster than their competitors imitate them. This is why the European dredging companies are continuously investing in Research, Development and Innovation (RDI) in their new vessels and equipment as well as their processes and operations. World leadership in global markets is not a destination but a journey towards a constantly moving target.

“World leadership in global markets is not a destination but a journey of continuous self-improvement.”

For instance, EuDA members invested over €11.1 bn from 2008-2017 in new equipment, including new exploration and testing equipment to improve global environment conditions and in RDI to improve the efficiency of their operations and systems.

Moreover, EuDA promotes innovation-friendly legislation and governance. Indeed, when innovative solutions appear, they can be hindered or blocked by too prescriptive legislation and unadapted governance. This is why EuDA promotes goal-based legislations and performance-based standards over prescriptive ones. EuDA also promotes the Life Cycle approach to assess the costs and benefits of the different possible alternative solutions for a project. Typically, only the costs of the building phase are considered and the possible added-value or cost reductions occurring after (during operations, such as infrastructure maintenance, or during decommissioning) are usually not taken into consideration. By integrating long-term metrics and impacts in the decision-making, the Life Cycle approach opens up the range of solutions (from hard solutions to soft solutions) and provides decision-makers with the proper long-term assessment tools to invest in more sustainable solutions.



### European Maritime Day 2017, in Poole: “The Future of our Seas”

Created by a tripartite declaration by the Presidents of the European Commission, the European Parliament and the Council of the EU, the European Maritime Day (EMD) is celebrated on and around the 20<sup>th</sup> May every year and aims to raise the visibility of a Maritime Europe. In its previous editions, the European Maritime Day successively took place in Brussels (2008), Rome (2009), Gijon (2010), Gdansk (2011), Gothenburg (2012), Valetta (2013), Bremen (2014), Athens (2015), Turku (2016) and Poole (2017).

2017 marked the 10<sup>th</sup> edition of the European Maritime Day (EMD) and was organised in Poole, UK. Its flagship theme was focusing on “*The Future of our Seas*”. The discussions were organised on Innovation and Growth, on Sustainability and Governance, on People and Skills and on Safety and Security.

In his opening speech as the European Commissioner for Environment, Maritime Affairs and Fisheries, Mr Karmenu Vella confirmed that the European Maritime Day is a showcase of European innovation. He also



remarked that sustainability is where Europe has a real competitive advantage.

As highlighted in the various workshops and sessions, education, skills, safety and security are key enablers of the Blue Growth Strategy. The EMD 2017 stakeholders concluded that Europe needed to:

- boost blue growth and innovation through a stronger EU strategic orientation;
- consolidate and move beyond geographical concentration;
- position Ocean Literacy as a driver of growth and innovation;
- enhance data sharing measures to optimise growth and innovation opportunities;
- integrate solutions to tackle sustainability;
- involve stakeholders to ensure the sustainability of the marine environment;
- use innovative technologies to tackle marine societal challenges;
- mainstream sustainability to minimise impact and protect marine environments.

### **European Shipping Week 2017**

Initiated in 2015 by the European shipping associations, the European Shipping Week (ESW) organises every second year a week of events to promote the strengths and the importance of European and global shipping to

the officials from the European Institutions. ESW gives the opportunity to reaffirm the strategic priorities of the maritime transport community and highlight the areas where further cooperation and efforts are needed. The Flagship conference on 01/03/2017 was also the opening event of the European Maritime Year, increasing the visibility and putting high priorities on shipping issues and policies. During the conference, the high-level speakers discussed the Global Trends Affecting Shipping and initiated debates on the European Shipping Policy.

ESW also gives the opportunity to showcase our activities and multiple site visits are organised. On 02/03/2018, EuDA organised the visit of the biggest lock in the world, the Kieldrecht Lock, and highlighted its members' contribution to this and other key logistical infrastructures in Europe and around the world.

The growing world population needs to integrate sea strategies in its daily life. EuDA members strongly believe that the growth potential for the dredging industry lies in sustainable multipurpose maritime infrastructures that make use of the forces of nature instead of fighting them. The future of dredging lies where the land meets the sea.

### **Completion of a new standard on dredging quality**

When the Hydraulic Fill Manual (HFM) was published





“Sustainability is where Europe has a real competitive advantage” **Karmenu Vella**

in December 2012, EuDA decided to pursue the good work done and support the creation of a European Standard on “*Land reclamation with dredged hydraulic fill*”. This European Standard is a much-needed standard also worldwide, as the only existing hydraulic fill standard is the British Standard. This 2016 standard is an amended version of the outdated 1991 standard with limited requirements on hydraulic fill.

The work was completed by the CEN technical Working Group on the Standard for Land Reclamation Works end of 2017 (CEN stands for European Committee for Standardisation). After the editorial revision, the standard should be published in the beginning of 2019.

**A risk for innovation and level playing field**

Under the lead of China Communications Construction Company Limited (CCCC, mother company of China Harbour Engineering Company, CHEC), China proposed three standards on “*supervisory and control systems*” for hoppers, cutters and grabs. In 2015, China obtained the creation of a WG 11 “Dredgers” under the jurisdiction of ISO Ships and Marine Technology Committee ISO/TC8 for the purpose of writing standards from its proposals.

EuDA’s analysis revealed that these proposals are clearly not output standards, but mere lists of

definitions with no common structure. Moreover, these proposals show a lack of knowledge or understanding regarding the automation processes on board the concerned dredgers. These proposals seem to aim at obtaining prescriptive descriptions on how to do the works rather than on the quality level of the output.

Concerned about the creation of unnecessary standards, EuDA created an ad hoc Task Group on Dredging Standards to work on this issue and prepare a lobbying strategy targeting ISO Member States and asking them to stop the development of these standards or to downgrade them to lists of definitions.

2017  
Members of the  
Task Group  
on Dredging  
Standards



**Paris Sansoglou**  
*(TG DS Chairman, EuDA)*



**Patrick van Eerten**  
*(Boskalis)*



**Robby De Backer**  
*(Jan De Nul)*



**Jaap Bakker**  
*(Van Oord)*



**Bart Verboomen**  
*(DEME)*





## Protectionism is an Obstruction to Sustainable Innovative Solutions

Protectionism may negatively impact the environment by denying access to non-domestic world-class environmental friendly solutions, such as Building with Nature, that could prevent or repair damage, restore habitats and provide long-term sustainable solutions.

## ENVIRONMENTAL

### Air Emissions

Most of the work on CO<sub>2</sub> and other emissions is coordinated and executed by a well-established EuDA working group dedicated to the Emissions from the EuDA fleet and functioning as the European Dredgers' central knowledge point on emissions. For a more detailed description of the activities of EuDA on this issue, please refer to Chapter 4 on "Climate Change and Coastal Defence".

### Sulphur Emissions

Besides greenhouse gases (GHGs), EuDA followed closely the developments concerning the sulphur content of marine fuels. Concerning the other air pollutants, such as Particulate Matter or NO<sub>x</sub>, EuDA continued its monitoring.

The Sulphur Directive, limiting to 0.10% the sulphur content of marine fuels to be used in designated SO<sub>2</sub> Emission Control Areas (SECAs), was adopted by the European Council in 2012. The Directive finally entered into force on 01/01/2015 (in line with the Annex VI of the MARPOL Convention) and applies to the North Sea, the English Channel and the Baltic Sea.

In a landmark decision, the Marine Environment Protection Committee (MEPC) of the International

Maritime Organization (IMO) set 01/01/2020 as the date for ships to comply with low sulphur fuel oil requirement of a global sulphur cap of 0.50% m/m (mass/mass) outside the Emission Control Areas (ECAs), such as the Baltic Sea and the North Sea (and English Channel). This IMO decision represents a significant cut from the current 3.5% m/m global cap and demonstrates its commitment to ensure that shipping fulfils its environmental obligations.

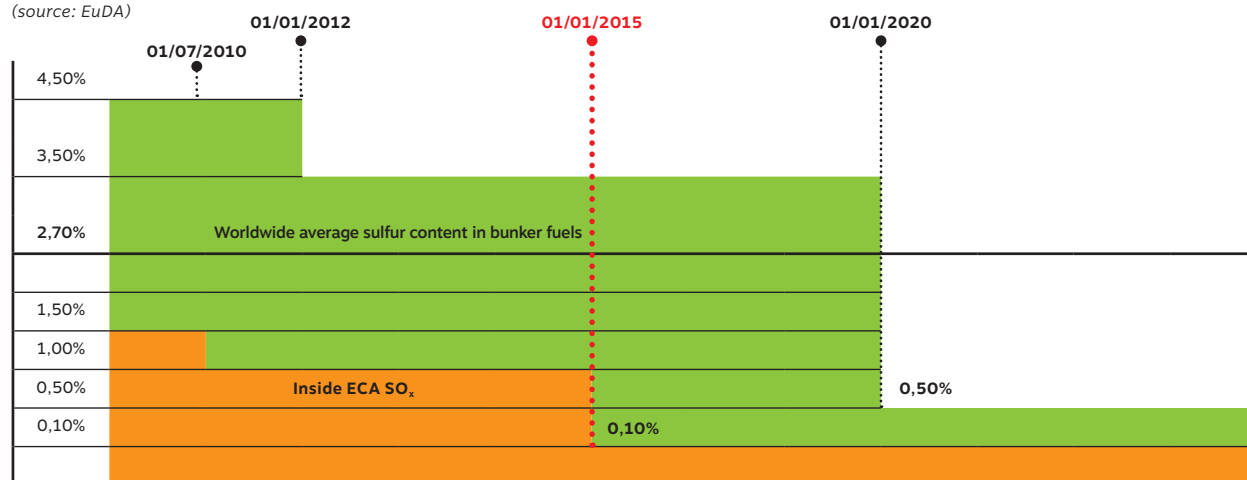
EuDA's members continuously reflect and regularly review their positions on issues. For example, following a dedicated workshop on sulphur emissions, EuDA

concluded that "the most realistic technical solution for the dredgers working in a SECA to comply with the sulphur requirements is to switch from heavy fuel oil to marine diesel oil". Since then, European Dredgers are testing alternative fuels, such as LNG or biofuels, they are building LNG dredgers and they are testing the possibilities offered by scrubbers.

"In 2020, low sulphur marine fuels or technologies will be the norm for ships."

### Sulphur Limits Evolution 2010-2020/25

(source: EuDA)



Graph 1: Sulphur Limits Evolution 2010-2020/25

HELCOM, the Commission implementing the Helsinki Convention, and in which EuDA has an observer status, has established a platform to discuss SO<sub>x</sub> and NO<sub>x</sub> issues in the Emission Control Area (ECA) of the Baltic Sea. The IMO has designated the North Sea and the Baltic Sea as NO<sub>x</sub> Emission Control Area (NECA) starting from January 1, 2021 onwards.

### Habitats and Biodiversity

The Birds and Habitats Directives are the cornerstones of Europe's nature conservation policy. They are built around two pillars:

- Natura 2000 network of protected sites;
- System of species protection.

EuDA has identified and contributed to these key issues because of the potential conflicts between transport and environmental policy objectives. The implementation of infrastructure projects, such as dredging, often suffers from significant delays, uncertainties or even cancellation.

### Natura 2000 Declaration and Natura 2000 Day

On 15/05/2017, EuDA participated in the event where Commissioner Karmenu Vella, Adina-Ioana Valean, Chairwoman of the European Parliament's Environment Committee, Karl-Heinz Lambertz, First Vice-President of the Committee of the Regions and Neil Kerr, Deputy

Permanent Representative of Malta signed a joint declaration proclaiming 21 May as the European Natura 2000 Day.

### IMO Ballast Water Convention in force

The IMO Ballast Water Management Convention (BWM), ratified on 08/09/2016 is in force since 08/09/2017.

### The Ballast Water Convention specifics for Hopper dredgers

In 2017, EuDA was informed of a possible situation regarding the interpretation and application of IMO Ballast Water Management Convention BWM.2 Circular 32.

IMO BWM.2 Circular 32 states that

*"1 [...] Hoppers are not considered to be ballast tanks. For stability requirements, the "hoppers" are not considered to provide buoyancy [...]"*

*2 According to Article 1.2 of the Ballast Water Management Convention, "Ballast Water" means water with its suspended matter taken on board a ship to control trim, list, draught, stability or stresses of the ship. Water in the hopper is considered as outboard water, i.e. the water is not taken aboard. Furthermore, the water is not used to control trim, list, draught or stresses of the ship. For that, water present in the*

*hopper area is not considered as ballast water.*

*3 Consequently, the Committee concluded that the provisions of the Ballast Water Management Convention are not applicable to the water in the hopper area of the hopper dredgers."*

EuDA considered that the text was clear: *"the provisions of the Ballast Water Management Convention are not applicable to the water in the hopper area of the hopper dredgers."* However, EuDA decided to reactivate its Ballast Water Task Group (BWTG that was created in 2011 for the purpose of supporting Belgium and Netherlands in their joint submission to IMO that lead to the creation of Circ.32). The BWTG would be tasked in 2018 to

- prepare a lobbying strategy to support the EuDA member in its national lobbying;
- consider the preparation for a Position Paper.

### Horizon 2020 project: ThinkNature

#### Objective

In 2016, EuDA joined the "ThinkNature" consortium managing an EU funded project (under Horizon 2020). The main objective of the present project is the development of a multi-stakeholder communication platform that will support the understanding and the promotion of Nature-Based solutions (NBS) in local, regional, EU and International level. Nature-based

2017  
Members  
of the EuDA  
Environment  
Committee

Pieter van der Klis  
(EnvCom Chairman,  
Van Oord)



Daan Rijks  
(Boskalis)



Mark Russell  
(BMAPA)



Chantal Schillemans  
(Vereniging van  
Waterbouwers)



Karel Allaert  
(Jan De Nul)



Paul Vercrujse  
(DEME)



Paris Sansoglou  
(EuDA)

solutions (NBS) are actions inspired by, supported by or copied from nature that aim to help societies to address a variety of environmental, social and economic challenges in sustainable ways. Through dialogue uptake, facilitation and steering mechanisms as well as knowledge capacity building, the ThinkNature Platform will bring together multi-disciplinary scientific expertise, policy, business and society, as well as citizens. This platform ambitions to be efficient, easy to use and attractive to a wide variety of actors and stakeholders because it merges all aspects of NBS in a clear, pyramidal methodological approach. It will create a wide interactive society that builds new knowledge with a wide geographical scope.

ThinkNature will provide the Commission and concerned Member States with the necessary policy and regulatory tools to solve significant societal challenges such as human well-being, tackling energy poverty, impacts of climate change, etc. through continuous dialogue and interaction.

This purpose fits with EuDA's activities and would even strengthen EuDA's position towards environmental circles and DG Environment by promoting the Building with Nature approach.

#### ***Kick off meeting and progress***

The ThinkNature kick-off meeting took place on 11-12/01/2017 in Chania (Crete, Greece) and the partners met altogether for the first time and prepared work plans for the coming three years. In 2017, amendments were made to the initial proposal to reflect the changes in the consortium partnership (addition of OPPLA and Biodiversa and departure of the City of Paris).

On 31/05/2017, the ThinkNature partners met again for the project's first review meeting with the Commission. It was then confirmed that the project is progressing according to schedule. The project partners organised an international conference in Tallinn in 2017 under the Estonian Presidency of the EU and are currently preparing another one in La Coruna in 2018.

#### ***EuDA Network on NBS***

An informal EuDA Network on Nature-Based Solutions (NBS) was established. It is a thematic network composed of one or two central contacts per member and functioning as a knowledge network whereby each request from ThinkNature will be relayed to these central contacts who then will relay it to the relevant expert in the companies and revert back to EuDA with their feedback.

Thanks to the input collected through this informal EuDA NBS Network, EuDA was able to meaningfully contribute to the various Work Packages and Tasks in which it was involved. EuDA contributed on issues and discussions dealing with the application of Building with Nature to improve climate change resilience.

### Nature Directives Fitness Test

Following a stakeholder meeting on 06/02/2017, it was concluded that

*“Nature Directives are fit for purpose, but their implementation is ‘half-sick’”, as:*

- too many species/habitats continue to show negative trends
- only 50% of sites are properly managed
- Marine Natura 2000 network is incomplete
- funding shortage
- cases of inflexible application & permitting delays by national & local authorities
- insufficient knowledge, awareness, engagement & cooperation
- Nature Directives require action also outside Natura 2000

### The revised Waste Framework Directive

*“In the majority of cases, dredged material is not a waste but a resource to put to beneficial use”.* Although effective, this situation is not sufficiently known nor recognised by the policy makers and legislators across Europe.

At EU level, EuDA’s campaign convinced the Commission to remove dredged sediments from the scope of the 2008 revised ‘Waste Framework Directive’ (WFD)





(unless proven hazardous). The European Directives, though, are not immediately law (like the European Regulations) but need to be transposed into national legislation. Therefore EuDA's focus included the EU Member States. There is a significant difference in the implementation of the Waste Framework Directive into the Member States' national legislations. As it appears there are differences of views between some Northern and some Southern EU countries, hence the need for further work to harmonise the national legislations and approaches in the Member States.

### Roadmap to a circular economy

The concept of 'Circular economy' has progressively been elaborated by the European Commission. With the 'Circular economy' motto "*waste is a resource to be put to beneficial use*", DG Environment aims at stimulating and maximising the re-use/re-cycling of waste.

### Water & Marine Strategy Framework Directives

The Water and Marine Strategy Framework Directives are the cornerstones of Europe's water policy.

The main objectives of these European legislations are the protection of all waters (surface, ground) as well as the marine environment across Europe.

To achieve these objectives, they considered river basins for the management, they used the so called "combined approach" of emission limit values and quality standards (Good Ecological Status for the water quality and Good Environmental Status to include human activities). The Marine Framework Directive is the more recent of the two and the timeline of its first loop includes: the completion of the Member States' respective monitoring programmes in 2014, then their programmes of measures in 2015 with the ultimate goal of achieving the Good Environmental Status (GES) in 2020!

Among the many issues dealt with under the Water Framework Directive, there are similar and new ones with the Marine Framework Directive:

- Selection and implementation of the Measures (Descriptors), their Monitoring and adaptive Management;
- Integration and further development of the Shipping activities;
- Clarification of the handling of contaminated/ uncontaminated sediments.

The Marine Strategy Framework Directive (MSFD) aims at "filling the gaps" left by the Water Framework Directive (broadening the geographical scale and

introducing human activities' impacts on water quality and ecosystems).

EuDA continued to closely follow the developments in the implementation process of the Water Framework Directive (WFD) through PIANC's Navigation Group and of the Marine Strategy Framework Directive (MSFD) through CEDA's Marine Strategy Navigation Group.

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**"In the majority of cases, dredged material is not a waste but a resource to put to beneficial use."**

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## Protectionism is an Obstruction to World-Class Coastal and Storm Defences

By hindering or blocking non-domestic best practices and solutions, protectionism deprives its own local society from world-class solutions and state-of-the-art defences, that will aggravate in the long-term the local impacts of climate change. Protectionism offers no protection, in this case, it even reduces or removes protection.

## CLIMATE CHANGE AND COASTAL PROTECTION

From its inception, the Emissions Working Group (EmWG), formerly CO<sub>2</sub> Working Group, worked towards establishing and implementing the EuDA common CO<sub>2</sub> Strategy. The main objective of the CO<sub>2</sub> Strategy has been to improve internal and external understanding over the CO<sub>2</sub> emissions from the EuDA dredging fleet.

With the nomination of Paul Vercrujssse as new chair of the group in 2017, the members of the EmWG reflected and confirmed the importance of having a specialised working group focusing on CO<sub>2</sub> emissions. They also agreed to include in its scope the other emissions from dredging vessels and therefore, the name of the CO<sub>2</sub> WG was accordingly changed into Emissions WG. The enlarged scope of the Emissions WG includes all dredging vessels' emissions (including CO<sub>2</sub>, SO<sub>x</sub>, NO<sub>x</sub> and PV).

With the consistent promotion of its CO<sub>2</sub> Strategy, through position papers, consultations, presentations, specialised articles, meetings, ... EuDA continuously raises awareness of officials and representatives from the European Commission, the European Council (through the Member States) but also from IMO on the views and main recommendations of the European Dredgers with regards to CO<sub>2</sub> matters.

### EuDA CO<sub>2</sub> Strategy

EuDA established a CO<sub>2</sub> Strategy with as main objective to build a better understanding of the CO<sub>2</sub> emissions from the EuDA dredging fleet. From the start in 2009, EuDA established a procedure and methodology for the collection of raw data for the calculation of CO<sub>2</sub> emissions. The Strategy also involved working with the International Maritime Organization (IMO): EuDA

and IADC made a joint Statement in 2010 warning that the IMO Energy Efficiency Design Index (EEDI), as it stood, could not be implemented on the dredging vessels. Instead, the associations proposed a possible alternative approach to reach the same goal.

In 2017, EuDA pursued its implementation work with regards to the EuDA CO<sub>2</sub> Strategy and focused particularly on the targeted external communications, which are documents describing the industry backed methodology for estimating CO<sub>2</sub> emissions from dredging vessels. The work involved information gathering, internal knowledge building and specific message formulation to communicate clearly our issues to the relevant parties. Besides the contacts within the Member States, the EmWG has kept regular contact with the Commission's DG CLIMA informing the Officials

**Paul Vercrujssse**  
(EmWG Chairman  
DEME)



**Arjan Schrijen**  
(Boskalis)



**Jan Tilman**  
(Van Oord)



**Karel Allaert**  
(Jan De Nul)



**Fay van Dongen**  
(Vereniging van  
Waterbouwers)



**René Kolman**  
(IADC)



**Paris Sansoglou**  
(EuDA)



2017  
Members  
of the  
EuDA Emissions  
Working Group

and making them aware of the specific situation of the dredgers.

### Communication as a process

On the basis of the TGEF 2012 Report, EuDA compiled external communications for three types of dredgers: Trailing Suction Hopper Dredgers (TSHD), Cutter Suction Dredgers (CSD) and Backhoe Dredgers (BHD). The main purpose of these External Communications is to provide fair and transparent industry backed methods to support clients on estimating CO<sub>2</sub> emissions for dredging projects.

Although proactive, this initiative of EuDA is timely and anticipates the growing trend among European public administrations to include CO<sub>2</sub> emissions (performance) in the requirements of the future tenders, while also trying to improve the level playing field during the tendering phase. When wrongly taken into account by consultants because dredging processes are misunderstood, or when the calculation methods are neither fair nor transparent, these CO<sub>2</sub> requirements could represent a potential threat to the industry.

EuDA CO<sub>2</sub> Strategy has reached a next phase and published the External Communication on how to calculate in a fair and transparent way CO<sub>2</sub> emissions

from Trailing Suction Hopper Dredgers (TSHDs). This report, only available on demand at the EuDA Secretariat, highlights the main aspects to take into consideration for a realistic estimation of the CO<sub>2</sub> emissions to expect under normalised conditions for a particular project. This report is not intended to replace the direct advice from the contractors, on the contrary, it even promotes the Early Contractor Involvement. Finally, the report also states that it is important to leave the choice of dredging equipment and methods to the contractors, who can come up with new approaches, solutions and technology and keep innovating.

In 2017, EuDA shared this report upon request of administrations, such as Rijkswaterstaat in the Netherlands and ISPRAmbiente in Italy, and upon request of international organisations, such as PIANC and CEDA where ad hoc working groups were informed about the report and presented with its conclusions (PIANC WG 188 on Carbon Management for Port and Navigation Infrastructure; CEDA WG on Energy Efficiency).

### Data update and review

Considering that the TGEF 2012 Report is based on data from 2010, EuDA rightfully decided to update it with the most recently available data (2017) and review

the general evolution of the European Dredging fleet's CO<sub>2</sub> emissions. Therefore, the TGEF will be reactivated in 2018 to work on this update as well as the update the three External Communications.

### EuDA Strategy for Energy Transition

During a workshop discussing CO<sub>2</sub> emissions and viable alternatives to fossil fuels, EuDA members decided to develop a reflection on a possible *“EuDA Strategy for Energy Transition towards a neutral carbon footprint”*. The EuDA Environment Committee will further develop the concept of energy transition strategy and organise a focused workshop on the subject in 2018.

“Fact-based information  
is crucial to legislators to make  
informed decisions.”

### EuDA CO<sub>2</sub> emission figures 2016

As part of the EuDA CO<sub>2</sub> Strategy, the CO<sub>2</sub> Working Group has collected and compiled the 2016 data for the CO<sub>2</sub> emissions of the European dredging fleet.

In absolute numbers, the world seagoing dredging fleet was estimated to have produced 6.3 Mton of CO<sub>2</sub> in

2008. The emissions of the European Dredgers (EuDA members) in 2008 were about 3.4 Mton. From 2009, the European dredgers' CO<sub>2</sub> emissions continuously dropped to 2.7 Mton in 2014. Then, in 2015, the decrease of emissions stopped and the emissions raised to 3.0 Mton but went back down in 2016 to 2.4 Mton below the level of 2014. In fact, the emissions increase

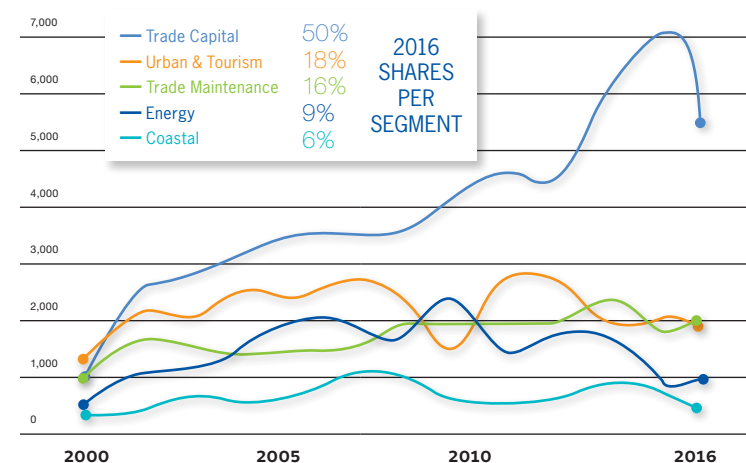
**Table 1: EuDA fleet CO<sub>2</sub> emissions (2008-2015)**

EuDA Sea-going dredging equipment		Installed power kW	Fuel consumption ton	CO <sub>2</sub> emissions ton
2008	Global operations and emissions	1,510	1,090	3,440
	European operations and emissions	420	280	880
2009	Global operations and emissions	1,587	1,016	3,211
	European operations and emissions	511	307	1,088
2010	Global operations and emissions	1,591	999	3,159
	European operations and emissions	654	420	1,326
2011	Global operations and emissions	1,779	1,003	3,163
	European operations and emissions	637	357	1,126
2012	Global operations and emissions	1,845	986	3,108
	European operations and emissions	502	284	896
2013	Global operations and emissions	1,666	881	2,775
	European operations and emissions	527	220	696
2014	Global operations and emissions	1,599	847	2,673
	European operations and emissions	531	229	724
2015	Global operations and emissions	1,298	959	3,033
	European operations and emissions	409	223	713
2016	Global operations and emissions	1,264	751	2,371
	European operations and emissions	306	207	663

source: EuDA

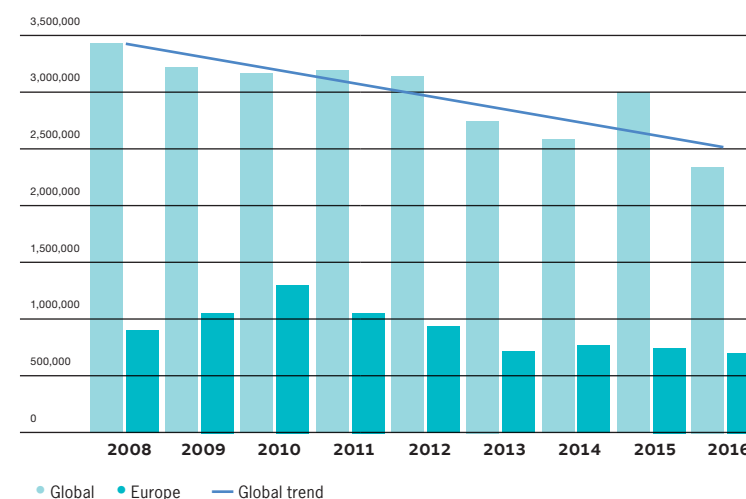
**Graph 1:**

**Dredging Turnover per driver (2016)** source: IADC - EuDA



**Graph 2:**

**EuDA fleet CO<sub>2</sub> emissions (2008-2016)** source: EuDA





in 2015 was mainly due the surge of activity linked to the expansion of the Panama and Suez Canals.

The growth of the global economy has been slowing down since 2009 and the inversion of the ratios between constant and current prices growth rates is the symptom of issues with global inflation-deflation. The growth of the global economy in current prices was positive (1.5%) in 2016 but below the growth in constant prices (3.1%).

The main drivers for the European dredging companies are various and not correlated, providing the sector with a form of acyclicity and with a reasonably steady growth.

The general trend in Graph 2 above confirms that of the total worldwide CO<sub>2</sub> emissions of the European Dredgers are steadily decreasing since 2008. The reduction in the CO<sub>2</sub> emissions can be partly attributed to the effects of the 2008 economic crisis, reducing the level of occupancy in the years after. However, with the surge of activity due to Suez and Panama, the global emissions of the European Dredging fleet in 2015 raised again and reached the level of 2012.

It has to be noted that inside Europe, a similar peak occurred in 2010 and the analysis revealed that the peak in emissions corresponded to a surge of activity

linked to the reclamation works for Maasvlakte 2 (the expansion of the Port of Rotterdam) in the Netherlands. After that, the level of CO<sub>2</sub> emissions in Europe stabilised at around 700 kttons of CO<sub>2</sub>, well below 2008.

Regarding the global emissions, 2016 emissions confirmed the general downward trend of the European Dredgers' emissions as they were at 2.4 Mt, well below the figures of 2014.

These figures also confirm that steady progress on CO<sub>2</sub> emissions reduction per m<sup>3</sup> (relative emissions of CO<sub>2</sub>) is achieved by the European Dredging industry. As stated by EuDA during the 2016 Annual Conference, absolute CO<sub>2</sub> emissions reduction cannot be disconnected from global activity in general and sector activity in particular. The achievement of absolute CO<sub>2</sub> emissions targets demands a Sector Strategy that combines relative efforts on emission reduction (CO<sub>2</sub> emissions per m<sup>3</sup>) with actions on reducing atmospheric CO<sub>2</sub> concentrations through offsetting measures such as the restoration of blue carbon habitats.

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**“The Paris Agreement sets the ambitious target of 1.5°C.”**

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### IMO Global Data Collection System

At MEPC 70, IMO adopted its new Regulation 22A to establish mandatory requirements for ships to record and report data on their fuel consumption. Ships of 5,000 gross tonnage and above will have to collect consumption data for each type of fuel oil they use as well as other additional specified data including proxies for transport work [distance travelled, service hours at sea and DWT]. This regulation shall enter into force on 01/03/2018.

This milestone decision included the adoption of a three step roadmap for the reduction of GHG emissions from shipping:

- 1° Data Collection (January 2019);
- 2° Data Analysis (September 2020);
- 3° Decision Making on further Measures (March 2021);

Besides this, MEPC 70 also approved the establishment of new NO<sub>x</sub> emission control areas (NECA) as from 1 January 2021 (for the Baltic Sea and the North Sea).

On behalf of the international shipping sector as a whole, ICS urged the IMO to adopt significant CO<sub>2</sub> reduction objectives in order to match the ambition of the Paris Agreement on climate change. In a joint submission to the IMO Flag States, ICS, BIMCO, INTERCARGO and INTERTANKO, proposed for adoption the following three objectives:

1. To maintain international shipping's annual total CO<sub>2</sub> emissions below 2008 levels;
2. To reduce CO<sub>2</sub> emissions per tonne-km, as an average across international shipping, by at least 50% by 2050, compared to 2008; and
3. To reduce international shipping's total annual CO<sub>2</sub> emissions by an agreed percentage by 2050, compared to 2008, as a point on a continuing trajectory of CO<sub>2</sub> emissions reduction.

EuDA welcomed these developments and encouraged further progress with regards to the reduction of CO<sub>2</sub> emissions from ships. However, consistency (ideally compatibility) is needed between the EU MRV Regulation and the IMO Regulation 22A: it is essential to avoid duplication and excessive administrative burdens.

The European Dredgers are ready to contribute to the collection of meaningful data. Emission data collected from individual dredging ships is difficult to interpret

for dredgers because these vessels use energy to both sail and work at sea. Moreover, the energy efficiency of a dredging vessels can only be determined on the basis of the project working conditions (depth, soil, distances to sail, etc). It is therefore recommended to use the project as main reference for the optimisation of CO<sub>2</sub> emissions. Proactive for years on the CO<sub>2</sub> issue, EuDA has developed an understanding of the energy efficiency and the consequent emissions of its fleet. As mentioned above, EuDA published its External Communication on TSHDs which provides the means to a realistic estimation of the CO<sub>2</sub> emissions from a project (available on demand at the EuDA Secretariat).

EuDA joined forces with the International Marine Contractors Association (IMCA), IMO observer association which shares similar issues regarding the application to their specialised offshore vessels of the current system of data collection. Together, we have submitted a joint paper on 28/04/2017 to MEPC 71. This paper highlighted the difficulties to apply the current IMO generic approach for the emissions vessels providing specialised offshore services, including dredgers. The paper's main objective is to keep the IMO and the European systems consistent with each other and (completely) aligned with an exemption for the dredgers (like in the EU Regulation on Monitoring,







Reporting and Verification of shipping GHG emissions - MRV).

*27 [...] it is recommended that offshore and marine contracting vessels should be excluded from the present efforts to develop “transport work” proxies.*

Moreover, EuDA made a similar statement in its submission to the European Commission’ consultation on the possible revision of the MRV Regulation asking for alignment of the two legislations with exemption for the dredgers.

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“Dredging vessels use energy to both sail and work at sea.”

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### **EuDA cooperations on Climate Change**

By cooperating with PIANC and CEDA in joint initiatives, EuDA is further increasing the visibility of the European Dredgers with regards to Climate Change Adaptation and Mitigation.

### **Think Climate**

EuDA joined the ‘Think Climate Coalition’ led by PIANC and co-signed a position paper on “Navigating a changing Climate” that was presented at the 21st Conference of the Parties of United Nations Framework Convention on Climate Change (UN FCCC COP21) in December 2015. The Coalition established a roadmap of actions contributing to achieving some of the goals of the Paris Agreement. Most actions were already existing or already planned within the Coalition members’ organisations. The Coalition’s added value stems from the grouping of these individual initiatives under the Think Climate umbrella to give them together more visibility and impact than individually. EuDA’s contribution to the coalition included its work on Blue Carbon, its External Communication on TSHD and its members’ work on Building with Nature.

On 27-28/03/2017, PIANC organised a Conference on “Moving towards low carbon and resilient waterborne transport infrastructure” to which EuDA and some of

its members both contributed and participated. At the conference, the EuDA papers on Blue Carbon, prepared for the WODCON XX and XXI, were presented.

### **Carbon-related PIANC Working Groups**

EuDA and its members are active members of:

- WG 178 on *Climate Change Adaptation for Ports and Waterways* and
- WG 188 on *Carbon Management for Port and Navigation Infrastructure*.

### **European Climate Change Adaptation Conference 2017**

After jointly organising a workshop with CEDA in the context of the 2015 European Climate Change Adaptation Conference (ECCA), EuDA and CEDA were invited to make presentations and participate in a panel discussion during Business Day of ECCA 2017 in Glasgow. The revised programme was more attractive to business.



## Protectionism is an Obstruction to the Creation of Local Jobs

By protecting a biased selection of companies, protectionist measures protect a similarly biased selection of jobs, that may prevent or delay the creation of many more jobs. Indeed, this is the case when the protection prevents non-domestic world-class capacity to boost the local companies too limited to tackle the upgrading backlog of their ports. Companies depend on ports for their global development. Delays in the ports' expansion directly translate in delays in the local economic development and job creation.

## SOCIAL

### EU State Aid: need for continuation and minor improvements

The Community Guidelines on State Aid to Maritime Transport (hereinafter the “Maritime Guidelines”) were first introduced in 1997. Recognising the strategic importance of maritime transport for the European economy in general and for the European maritime cluster in particular, the Maritime Guidelines provided an EU-wide framework for Member States to apply positive measures (not operational aid) to counteract competition distortions and imbalances on the global maritime markets with voluntary measures. These measures aimed at improving the global level playing field, at fulfilling objectives of common European interest (including safety, security and environment friendliness of maritime transport, flagging and re-flagging to Member States’ registers), at maintaining and improving maritime know-how, and at protecting and promoting employment for European seafarers.

The maritime transport sectors, which include maritime dredging, were faced then and still are with significant challenges, such as fierce global competition in the market of the sea-going vessels, which run the significant risk of reflagging and relocating outside the EU.

In so doing, the Maritime Guidelines attempt to partially compensate for the market failures on the global maritime markets. They allow the EU Member States to provide certain incentives to maritime sectors involved in the transport of goods and passengers by sea in order to (re)flag EU vessels and employ (more) Europeans.

The Maritime Guidelines were revised in 2004 and prolonged in 2013. Compared to 1997, the Maritime Guidelines imposed stricter conditions in 2004 and resulted for the dredgers in the exclusion of seagoing self-propelled cutters from the scope of the guidelines and the introduction of the 50% rule (*imposing that 50%*

*of the operational time is spent doing ‘maritime transport’ activities*). These dredging vessels, however, continue to play a key competitive role in the maritime dredging cycle: making projects more efficient and economical.

From its 2013 consultation, DG Competition (DG COMP) concluded that there was no reason to remove any currently accepted benefits. Based on this result, DG COMP decided to extend, unchanged, the 2004 Maritime Guidelines for an undetermined period of time (without any foreseen revision date). With regards to the current status of the Maritime Guidelines, they are still valid. Commissioner Margrethe Vestager considered that the more recent market developments (since 2013) meant that the approach did not need change.

With regards to the next steps, besides waiting for the responses to open enquiries on specific cases of State Aid to Maritime Guidelines, DG Competition has conceded

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2017  
Members  
of the  
EuDA  
SocCom





Boskalis

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**BOSKALIS**  
Reductie met - Reductiemat  
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that some clarifications of the 2004 Guidelines might be necessary in light of the decisions made so far. Indeed, during the 2015 Annual EuDA Conference, DG COMP explained that a limited revision of the Guidelines at some point in time could not be completely ruled out. Out of the two possible options, the minor changes are the most likely option as they should integrate post-2004 decisions and bring some needed clarifications to the guidelines' text. The other option is a major review which would involve a full procedure lasting a few years and, for this reason and because the market developments do not require a change in the approach (see above), this comprehensive review is the least likely option.

In preparation for the likely minor revision of the State Aid Guidelines to Maritime Transport, EuDA completed an internal survey to collect evidence substantiating EuDA's recommendations for the Guidelines' revision, summarised as follows: while keeping dredging in their scope, the Guidelines should exempt dredgers from the "50% Rule" and enlarge the scope to other self-propelled ocean-going dredging vessels (such as CSD, or other offshore services vessels).

Since 2016, EuDA conveys the following recommendations to Commission officials from DG Competition:

1. "[...] The Maritime Guidelines are needed to compensate for the global competition distortions and should be kept (extended in time).
2. "[...] the inclusion of the loading phase of the maritime dredging cycle under the scope of the Guidelines seems perfectly appropriate and [...] justify the exemption of the Dredgers from the '50% Rule'. [...]
3. "[...] the eligibility to the Maritime Guidelines should be extended to the self-propelled ocean-going cutter suction dredgers as well as offshore service and supply vessels (e.g. cable/pipelayers, stone dumpers, jack-ups, ...)."

Following this meeting, dredging was certainly better understood by DG COMP. It was confirmed that State Aid attributed to Maritime Dredging is considered positively as the objectives of the aid target higher societal values (e.g. improving global level playing field in maritime markets, maintaining the European Flags, keeping the maritime knowledge and skills in Europe).

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**“The Maritime Guidelines aim at reducing global competition distortions in maritime transport.”**

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### Review of the EuDA Vision on State Aid

EuDA's Social Committee decided to revisit its vision on State Aid with an in-depth approach, building on the good work of the past, making the best use of the lessons learned and keeping the momentum in order to improve the case of the Dredgers following the constructive exchanges with DG COMP.

In a first step to develop their comprehensive approach, the EuDA members established a draft wish-list of the priorities (mainly extracted from the internal survey) to be included in the likely revision of State Aid Guidelines:

- maintaining the guidelines for dredgers (State aid is still necessary to reduce the costs of European seafarers who are, despite the aid, still too expensive);
- removing the 50% rule for dredgers (the burden of the proof associated with this rule causes unnecessary extra costs);
- clarifying maritime access for both ships and seafarers (ships working on maritime access need to comply with IMO legislation; seafarers' visas should be sufficient, although there are requirements for local working permits);
- keeping tonnage tax for offshore services vessels;
- keeping separate the State aid treatment of dredgers and other offshore services vessels (e.g.

the ships eligible for State aid by their own merit should not be grouped under the dredgers);

- review the long-term vision along with its communication plan (the dredging industry long-term vision aims to guide both priorities and lobbying actions; to harmonise approaches and concepts where possible);
- broaden the scope of the guidelines to include:
  - positive perception by DG COMP;
  - connect priorities to EU values on Sustainability and CO<sub>2</sub> performance;

The next steps to complete and finalise EuDA's in-depth approach will include a workshop in 2018 to exchange views and brainstorm, to build intelligence and provide the basis for the revision of the long-term vision for the sector and possibly also provide for a position paper.

### **Implementation of the Maritime Labour Convention at European level**

The ILO Maritime Labour Convention was ratified in August 2012 and came into force in August 2013. The latest MLC ratifications brought the number of signatories to 83 Flag States representing around 92% of the world tonnage.

The attention of the EuDA members was drawn to the fact that the MLC certificate need to comply with the 2014 amendments of the MLC 2006 on *Seafarers abandonment and crew claims*. Following these amendments of the MLC 2006, the EU legislation, which is a direct transcription of the ILO Convention, was also updated. Regardless of how mechanical this process might appear, attention is needed as there is always the risk of the Commission enforcing stricter legislation and creating competitive distortions.

In most cases, these amendments do not affect the European Dredgers, however the two key issues being discussed with regards to the implementation of the MLC in the Netherlands include: the treatment of project specific personnel as part of the seafarers' teams (for the purpose of MLC) and the newly introduced amendments to the ILO MLC.

Many EuDA members shared concerns over the definitions of seafaring and non-seafaring personnel on board ships. Such definitions have direct consequences on the required presence on-board of all documents (e.g. contracts) proving MLC compliance for these staff members. EuDA assessed the situation in several EU Member States and compiled best practices and developed a pragmatic, workable definition of non-seafaring personnel for the purpose of the MLC 2006. The remaining issues regarding these definitions concern the certification and the auditing.

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**“State Aid should more effectively target sustainable growth-enhancing policies while encouraging budgetary consolidation, limiting distortions of competition and keeping the single market open.”**

**DG COMP's State Aid Modernisation Package**

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### Australian Visas

In May 2017, EuDA was informed of a situation in Australia and was asked to take action.

### Background

In order to control and selectively authorise immigration, Australia introduced specific immigration programmes. The most commonly granted working visas are for hiring highly skilled workers in Australia. Work visas are often sponsored by the individual States or directly by Australian companies, recruiting to fit their specific needs. The most popular form of sponsored working visa was so far the 457 Visa set in place in 1996.

As from 18<sup>th</sup> April 2017, this 457 Visa has been abolished by the Australian Government and has been replaced with the Temporary Skill Shortage (TSS) Visa, introducing extensive changes to Australia's immigration policy.

In addition to the TSS requirements on relevant experience and skills, the Skilled Occupations list accompanying these new TSS visas has been substantially reduced from the previous list applied under the 457 Visa system.

Of significantly more concern for the dredging operations, number of skilled roles (such as Ship's

Master, Ship's Officer and Ship's Engineer) that were previously permitted are no longer available under the new Temporary Skill Shortage Visa system.

### Impact on the European dredging companies

The changes introduced with the TSS will have a significant impact on the ability of the European Dredgers to mobilise and operate dredging and off-shore installation vessels to and in Australia as it denies access of project-critical employees to work in Australia.

With their highly innovative and technologically advanced vessels, European dredging companies require the presence of dedicated and experienced crew and staff onboard. The latter are employed on a full-time basis and are part and parcel of a sustainable operation system unique to each vessel type and size.

The normal mode of operation when mobilising specialised vessels to Australia is to strike a healthy balance between locals and expats with regards to the crew on these vessels. A number of locally employed and qualified crew is hired and joins the already existing long-term expat crew who remain on board in the critical positions. Over the years, this system has been very successful. The typical proportions





for a TSHD are 8 expats and 22 Australians out of a total Persons on Board (POB) of 30 people, employed for the duration of the project. For CSD, the typical proportions are 9 expats and 29 Australians out of a total POB of 38 people for the duration of the project.

### **EuDA's actions and Recommendations**

EuDA prepared a position paper and initiated a diplomatic action through Benelux to solve the problem. In the paper EuDA drew the attention of the administrations to the following recommendations

#### *Dredging critical crew*

1° it is necessary to maintain permanent critical crew members on-board the individual dredging units. This necessity is irrespective of the country of operation and it is always the case for dredging jobs of generally short duration (mostly 6-10 months and maximum 1-2 years durations).

2° it would be impossible to operate worldwide with specialised dredging units with a critical crew needing to be replaced in each new country of operation. The critical crew includes dredge master, officers, engineers, mechanics and electricians who are trained, skilled and experienced in operating the individual dredging unit(s) efficiently and safely.

#### *Operating in Australia*

3° The ability to keep their critical crew and staff on board of their dredging and off-shore equipment operating on projects in Australia is indispensable to European Dredgers (and to any dredging company operating internationally).

4° It is the view of the European Dredgers that the **occupations** that were previously included in the Skilled Occupation List should be re-instated under the Temporary Skill Shortage Visas list so that visa applications can be lodged and obtained. Alternatively, other visa options have to be made available.

5° European dredging companies' do not intend to reduce or replace employment opportunities for Australians. As a matter of fact, the European Dredgers remain committed to continue to hire suitable and able crew members and staff as valuable assets for both our companies and our future projects in Australia.

6° Failure in obtaining authorisations for our highly skilled and vessel experienced crew and staff to access and work on Australian projects, dramatically increases our risk exposure and significantly reduces our opportunity to effectively tender and successfully perform and complete, if at all, future works.

#### *State of play*

So far, despite the activation of the Benelux diplomatic networks, no progress had yet occurred regarding the improvement of the new Temporary Skill Shortage (TSS) Visa.

A lot of lobby work will also continue to be done locally, towards the Australian government and authorities.





## Protectionism is an Obstruction to World-Class Added-Value

By hindering or blocking non-domestic competitors from accessing their market, protectionist measures offer a temporary relief to the domestic economic issues. Protected markets are isolating themselves from the world and cannot fully benefit from the available world-class knowledge and added-value. Protectionism slows down the development and quality of the local products and services with processes growing obsolete. In the medium- or long-term, the local economies pay the price for protecting markets: they have to endure higher costs and prices, lower added-value, longer delivery times, etc.

## INTERNATIONAL MARKETS

Following the failure of the WTO Doha Round, the direct 'bilateral' agreements have received the preference over the WTO multilateral approach. In this context, the EU has been engaging in trade negotiations to conclude New Generation Free Trade Agreements with priority trade partners from Asia such as ASEAN, India, Vietnam, Malaysia, Singapore, South Korea or Japan, from Latin America such as MERCOSUR, Colombia, Peru or Central America, from North America such as Canada and the US, and from African, Caribbean and Pacific countries such as South Africa.

### **EuDA Lobbying in the US**

#### **EU-US negotiations stopped**

Largest economy in the world and free trade champion, the US is the biggest trade partner of the EU and a top priority to negotiate a Free Trade Agreement with. By removing a wide range of trade barriers between both

economic zones, such an agreement could create the biggest free trade area in the world.

In July 2013, the negotiations for a Transatlantic Trade and Investment Partnership (TTIP) started between the EU and the US. From the start, the EU had the ambition to make a model agreement that would shape global rules on trade and become the template for all the following agreements. With TTIP, the EU intended to eliminate or reduce tariffs across most/all sectors (including services, investment and public procurement) and to tackle non-tariff barriers (such as differences in technical regulations, standards and approval procedures), costing unnecessary time and money to companies selling their products or services on both EU and US markets.

Unfortunately, when President Donald Trump was elected, any activity around TTIP ceased.

### **EuDA US Lobbying Strategy**

From the very start, EuDA based its Strategy on US Market & Legal Intelligence. The European dredgers' approach aimed at providing clear and objective facts that demonstrate that it is in the interest of the US to open their dredging market to the Europeans. The opening of the US dredging market would allow the US to

- access the best available dredging knowledge, technologies and know how in the world;
- create more jobs, training and development opportunities for US citizens;
- obtain more added value at lower costs and shorter time per project;

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(NABU)



Paris Sansoglou  
(EuDA)



2017  
Members  
of the  
EuDA Task  
Group on US  
Market Access

- dispose sooner of better and more efficient waterborne infrastructures;
- to build more US-built ships (with the increased maritime traffic);
- dispose of additional options for exit strategies for family owned dredging businesses;
- obtain significant improvements in terms of safety (e.g. coastal protection) and environment (e.g. Building with Nature); and
- more efficiently use the Taxpayers' money.

Moreover, the European Dredgers' Strategy targets the minimum legislative changes and essentially focuses on the most workable solution. Among the legislative barriers, the Dredging Act is the most prominent barrier preventing European Dredgers from entering the market and providing their specialised services to the US waterborne infrastructures managers.

The facts and arguments were progressively refined and improved. By letting the European Dredgers access the US dredging market, more US jobs can be created by dredging projects in the US because of a backlog of projects, because of dredging capacity limitations, because of the availability of sufficient budget to start the needed works but these are 'symbolic' jobs (a few thousand). The more 'important' jobs will be created by

the increased ports' capacity that will be able to capture the full benefits of the expansion of the Panama Canal and of the economic growth (a few million).

### TTIP legacy and renewed focus

Following the election of President Trump and his entry in office, the TTIP negotiations have been stopped. The opening of the US dredging market to European companies however was not and is not exclusively linked to TTIP.

Despite their abrupt ending, the TTIP negotiations left a very positive legacy for dredging. Indeed, TTIP brought high visibility to dredging and got dredging higher on the trade agendas of the US, the EU and Benelux. This raised enormous political traction momentum on which to build a real possibility for a deal. While keeping regular contacts with the European administrations, including the European Commission and Member States' officials, EuDA visited in 2017 the EU Delegation to Washington (EUDEL) and the Benelux Embassies to present them with the views of the European Dredgers and their strategy regarding the opening of the US market.

In conclusion of these visits, EuDA obtained a renewed cooperation between Benelux and the EU to join their diplomatic forces towards opening the US dredging

market to European companies with an adapted approach. However, the Embassies and EU Delegation remained cautious (realistic), explaining that the mood in Washington was dominated by two words: uncertainty and transaction.

### Revision of the Strategy

Following its mission to the US, EuDA revised its strategy and a new plan emerged, including:

- *Mapping* of the relevant dredging projects; of the main capacity issues; of the relevant stakeholders;
- *Analysis* (including qualitative information);
- *Business Cases* make a realistic case of the added value, cost reduction and time gains;
- *Lobbying Plan* target the relevant authorities, stakeholders, Congressmen.

“Market access to Europeans in the US would reduce costs, accelerate completion times, bring more added value and ultimately create more jobs in the entire US economy.”





Moreover, from the visit, the idea of organising a high-level Study Tour in Europe, to demonstrate on site European technologies and visit landmark projects was presented by the EUDEL. EuDA confirmed its full support for the initiative.

In revisiting the Strategy, certain US regions in specific States offered the possibility of many demonstration cases. One of the main difficulties was to demonstrate National Security reason to accelerate the opening of the dredging market. Since Hurricane Harvey hit America, the National Security reason was automatically identified as the need for help to rebuild and boost the coastal defences of the US against future extreme events.

#### Overview of the activities in 2017

EuDA took advantage of the visit of Pieter De Crem (Trade State Secretary of Belgium) to Wilbur Ross, US Secretary for Commerce, on 29/05/2017 to discuss the European Dredgers' win-win proposal.

In January 2017, Jones Act defenders came back to the offensive and proposed the repeal of 40 years favourable US Coastal and Border Patrol (CBP) decisions to allow selected foreign offshore vessels to work in US waters. This decision was ultimately cancelled by the Trump administration in what can be described

as the victory of 'big oil' (e.g. Exxon) against 'small oil' (e.g. Halliburton). The battle of the respective arguments focused on the impact of such a decision on the US economy and jobs: the successful arguments that convinced the administration, were those that demonstrated the least negative and most positive impacts on US economy and jobs. Following this recent example, EuDA decided that its Strategy should identify the potential 'Champion' ('big oil') among the companies which may benefit the most from more efficient import and export port's operations to make our case and campaign stronger. This means identifying the most powerful industries among the ports' customers and rally them to our cause by asking them to approach their (local, national and federal) political contacts and convey the message that European Dredgers should be allowed to work in US waters and ports.

#### The EUDEL Study Tour

The EUDEL arranged an "EU Water Management Study Tour" for high-level participants from the US to attend technical visits and events held in Belgium, the Netherlands and Finland from 22/10/2017 till 28/10/2017.

Amongst the represented European water management sectors, dredging received the most visibility. EuDA

coordinated the presentations and its members closely cooperated with the different diplomatic networks to finalise the events. EuDA and its members organised discussions at breakfast, lunch, dinner, during site visits in Belgium and the Netherlands.

The event was very positively perceived by the participants and the EUDEL delegates. Many participants confirmed their interest in pursuing further the ideas presented by EuDA's representatives and will contact EuDA to organise in the US stakeholders' meetings and push for a Champion to request a waiver for European Dredgers to work in the US.

#### What's next?

In the current context and with the latest developments in the US and in Europe, the perspective of opening the US market is still credible and reachable. Only the future will tell and EuDA will continue to work towards opening the US market for European Dredgers and continue to substantiate its argumentation with concrete data, estimates and information.



## The Case of the Nationalisation of Dredging in Germany

### Background

In 2016, the German Federal Government opened a public tender to build a 7,500 m<sup>3</sup> TSHD with the aim of extending its State-owned dredging fleet from one to two TSHD's. The plan was to deploy the new built TSHD for the execution of maintenance dredging works on the Elbe. These maintenance dredging works were till today procured via public tendering processes and as such, the expansion of the State-owned



dredging fleet can be considered as a nationalisation case. EuDA was consequently approached by the Vereinigung der Nassbaggerunternehmen (the German Association of Dredging Companies, VdN) and was asked for help and support.

In coordination with its German members, EuDA created a dedicated Task Force on Germany to support the local German Task Group of experts.

The key issue in Germany is the closing of a further 25% of the maintenance dredging market by the new acquisition strategy of the national government (which is rumoured to also acquire a second TSHDs of 7,500 m<sup>3</sup> as well as new water injection dredgers) financially supported by the German central government in Berlin. The first legal analysis revealed no irregularities but nevertheless several options were further investigated, particularly in the light of some identified Case Law. State Aid is the main source of Case Law, however, the main issue is market access restrictions as the German market

could be closed de facto and normal competition will be seriously impaired.

Regarding State Aid, there appears to be a possible case of State Aid to a German shipyard, which won a newbuilding public tender for a price nearly double the 'normal' market price. EuDA considered the possibility of a formal complaint procedure but decided otherwise and opted not to antagonise the VdN Strategy with this legal recourse.

The VdN and EuDA strategies will be more political than legal. EuDA's Task Force role is to support the process under the lead of Vereinigung der Nassbaggerunternehmen (VdN). In order to support its lobbying in Germany, VdN has tasked the Institute of Shipping Economics and Logistics (ISL), a well-reputed Bremen-based institute in maritime logistics research, to do a fact-finding study. ISL is to assess the economic impact of the proposed German nationalisation in terms of jobs and costs per m<sup>3</sup>.

### Lobbying Strategy

VdN established an ad hoc Task Group of Experts that met regularly in 2017.

Looking at the political scene in North Germany, it is under the governance of Christian Democratic Union of Germany (CDU) and Social Democratic Party (SPD), who are promoting the new built of State-owned TSHD's with the argument of creating more competition in public tendering and employment opportunities in the public sector.

Seeing this political scene and the difficulty to convince the mainstream political parties, VdN reinforced its lobbying with professional support from a specialised public affairs consultant. Since then, the VdN lobbying strategy was further implemented and more relevant politicians approached. After the German elections (24/09/2017) and formation of a new government, VdN will speak at a breakfast meeting for the newly elected CDU Parliamentarians.

On the occasion of the EuDA Annual Conference, AGM 2017 Theme: *"Protectionism: Medicine to a Right Illness or Poison Pill?"*, the case of the nationalisation of the German dredging sector was briefly presented and discussed.



## EUDA 2017 ANNUAL CONFERENCE (15 NOVEMBER 2017)

### Conference's Summary:

The recent rise of populism around the world is often accompanied with the rhetoric that protectionism is the “panacea” that will revive economic growth and create more “national” jobs. By hindering or blocking foreign workers or companies from accessing the domestic market, protectionism offers an apparently comfortable cocoon that provides a temporary relief to the domestic economic issues ... but it often proves to be a short-term solution or a short-sighted decision.

Indeed, in the medium- or long-term, the disconnection from global trade and the “protection” from global competitors provide major disincentives for these protected companies and jobs to further develop, invest or innovate. They will be “frozen in time” and while the quality of their products and services will at best stagnate, their processes will progressively grow obsolete and inefficient with regards to the global market. Their costs and prices will rise and cripple their global competitiveness. By freezing these selected sectors, protectionism progressively transforms them into a liability to their national economic partners.

As global free trade champions, Europeans promote free market access and a level playing field worldwide. In the words of Jean-Claude Juncker: “As far as we [Europe] are concerned, there is no protection in protectionism”.

Moreover, reciprocal treatment is essential when dealing with global sectors and may prove to be a key part of a healthy strategy to erode and ultimately eliminate protectionism.

The conference opened with a short description of the possible globalisation illness affecting Europe. Then the speakers considered whether protectionism was a medicine to a right illness or poison pill and considered whether realism and reciprocity could lead the way to a globalisation wellness for Europe. Selected cases of dredging against protectionism were presented and were followed by an open lively discussion that concluded the conference.

### Conference's Speakers

#### ■ Conference Moderation:

##### **Mr Eric Van den Eede,**

Special Adviser on Waterborne Transport Infrastructure, Chairman of Flanders' Maritime Cluster, Conference Moderator

#### ■ *Is there a Globalisation Illness? from Globalisation Illness to Wellness ...*

##### **Prof. Jonathan Holslag,** Professor of International Politics, Free University Brussels (VUB)

#### ■ *Protectionism and Realism? Fight against Protectionism and Need for Reciprocity*

##### **Mrs Signe Ratso,** European Commission – DG TRADE, Director for Trade Strategy and Analysis

#### ■ *Dredging against Protectionism*

##### **Mr Paris Sansoglou,** Secretary General of the European Dredging Association

#### ■ *Open Discussion and Conclusions*

### Summary of the Conference's key messages:

- During negotiations for Free Trade Agreements (FTAs), in order to follow a pragmatic approach targeting real barriers – including border measures, unjustified regulatory barriers, subsidies etc., the input and support of industry is very important for the EU negotiators to understand exactly which barriers and limitations they need to address as a priority, and how to address them; Dredging is part of the solution and, as world leaders, the European dredgers provide their full support to the EU in its trade negotiations;

- Globalisation analysis should evolve from the traditional liberal interpretation, that it is the product of the private industry, to a form of economic realism, where it is also a product of political strength; the global economic cycles, that countries follow in their development, are reflected in their trade policies: prioritising protectionism for their local infant industry, then promoting market opening worldwide when their industry has reached a level of mature development and finally retrenching behind protectionism when their local industry stagnates or is on the decline;

“There is no protection  
in protectionism.”

Jean-Claude Juncker

- Protectionism is NOT a protection against unfair trading practices but a measure that in the long-term negatively impacts economic growth and welfare of the country and of the potentially exporting countries; in fact, protectionism is an example of unfair trading practices or policies introducing trade restrictions between countries (*market access restrictions, tariffs & non-tariff barriers, quotas*) that distort competition and affect the proper functioning of markets;

- In a world becoming more transactional, protectionism is on the rise, as confirmed by the 2017 EU Report on Trade and Investment Barriers. To tackle protectionism worldwide, the EU has established a *Market Access Partnership*, where EU officials, Member States and European industry representatives work together to remove trade barriers and this reinforced EU Market Access Strategy is delivering in tackling barriers;
- Substantial restrictions on ‘cabotage’ are still common practice around the world and very difficult to overcome or reduce. When trying to access dredging markets, essential trade barriers need to be tackled in the area of public procurement. Public procurement is often seen as an instrument of domestic economic policy whereby accompanying protectionist measures often impose various types of “local content” requirements;
- In his State of the Union speech, President Juncker called for reciprocity and stressed that “we [Europeans] are not naïve” and that “Europe must always defend its strategic interests”; when considering *reciprocity*, it is striking to note that the EU’s public procurement market is open; there are probably some reciprocal restrictions to ‘re-introduce’ when dealing with less open trade partners; moreover, this reciprocal treatment would provide additional leverage for the EU to negotiate better FTAs;

when considering *strategic interests*, Juncker’s investment screening plan is an essential policy instrument to identify and possibly trigger a countermeasure against third countries’ tactics or strategies targeting strategic European interests, knowledge and companies;

- The “buy local” requirements used by major industrialised countries in their public tenders are often used as a justification by third countries to follow the bad examples, with a risk of widespread snowball effect. For instance, the increase of “buy local” conditions in the various Buy American programmes has generally negatively impacted international trade with and investment in the US;
- When analysing today’s globalisation paradigms, the State Capitalism model of China transformed the country into a major economic power; China’s remaining ambition is to become a world super-power aiming for a new world order dominated by Chinese rules;
- China became the world’s workshop and further developed its strategy to conquer markets worldwide by controlling the pricing of the products and services delivered by its heavily supported and fully controlled State-owned Enterprises (SoEs) and by heavily providing easy access to cheap financing to the targeted customers; but China is reaching its peak and switches

towards new paradigms to challenge the Western lead in globalisation; the Chinese Statecraft translated its economic nationalism policy into the One Belt One Road and allocated 1 trillion US\$ to be spent in 5 years;

- The Chinese Globalisation strategy can be summed up as a military campaign to conquer the world:
  - 1° 'Divide and rule' to diversify exports (from developed to developing countries); *China benefits the most from weakening international organizations (WTO, ISO, IMO, ...)*
  - 2° Make a strategic use of their 'war chest' of foreign exchange reserves, towards acquiring strategic assets and industries around the world and towards financing their way into the global markets and their competitors out. *Export credits and concessional loans of China alone are twice the amount of the other OECD members!*
  - 3° Conclude package deals that can often not be matched by its competitors *combining transport infrastructure, resources exploitation and local investments.*
- China's 'Sino-centric' globalisation model creates an unequal trade partnership where China's partners are forced towards the lower end of the trade where China imports their resources and low added value products and services and exports higher added value products and services; in this model China's 'partners' develop with huge trade deficits;

- China's strategy makes use of the massive surpluses from its trading partners to create an unfair playing field of global proportions; so far there has been no visible resistance around the world; the Achilles' tendon of the Western countries is, on one hand, the fragmentation and disorganisation of their private companies and, on the other hand, the fragmented and uncoordinated responses from their politicians when faced with China's Communist 5-year plan championed by its army of SoEs under the direct rule of Beijing;

- Can the traditional economic diplomacy overturn economic 'warfare' at global scale ?; traditional Trade Defence Instruments are no longer dissuading China which has developed and refined its trade arsenal far beyond dumping (e.g. sophisticated tied financing schemes); Chinese won't make concessions by themselves, Europe needs more economic intelligence to build a long-term perspective with an integrated strategic approach between selected policy domains and strategic economic sectors: a unified European Industrial Policy, 360° policy exercise including a financial powerhouse (e.g. European ExIm Bank) matching those of its competitors;

- Can democracy overturn the competitive advantage created by dictatorship?

Europe cannot speak with one voice but should instead speak like one harmonious choir, composed of today still 28 voices singing the same song together while keeping their individual characteristics and identities and building together on each other's strengths;

- Dredging is facing protectionism around the world: cases with the US, China were discussed but one, closer to home, Germany, was described in more specific details;

US: when negotiating Transatlantic Trade and Investment Partnership (TTIP), access to public contracts in dredging was one of the EU's top priorities;

however, since 2017, TTIP has been frozen for an undetermined period of time; building on TTIP's momentum, European Dredgers have however continued their dialogue with the US to further explain the win-win situation of opening the US dredging market;

China: while promoting market opening worldwide, China keeps its domestic dredging market still hermetically closed;

With its One Belt, One Road (OBOR) Strategy, China intends to eliminate all competition involved in

infrastructure building from the third countries traversed by the ancient silk roads;

with its divide and rule approach, China intends to (and sometimes succeeds to) enter the European contractors' market; this situation of non-reciprocal treatment and non-identical market access was designed to help China in its transition; the 20 year transition is over, China is a major global economic player and reciprocal treatment needs to be enforced and become the norm;

moreover, when State Capitalism buys what it can't research or find by itself, when markets are closed down to competition because of the use of massive tied financial schemes, innovation is probably not going to be enough to remain world champion;

Germany recently decided to acquire one TSHD of 7,500m<sup>3</sup> and probably a water injection dredger. Officially aiming at improving competition in Germany, this can be considered as another nationalisation case;

indeed, the nationalisation of dredging is a process whereby particular dredging services are no longer provided by competing private companies but by the State, without the use of public tender, which means without open competition between bidders;

in a currently low global demand for dredging, with a lot of available capacity and fierce competition, it is particularly difficult to understand how a competition eliminating measure can improve competition;

moreover, the impact of such a decision could in fact significantly increase the yearly dredging costs (to be paid by the German taxpayer) and could cost more jobs than it may create but more importantly, this decision could also have an impact in the long-term on the competitiveness of the waterborne infrastructures (including ports) in Germany;

- Are there more meaningful alternatives to nationalisation of dredging?
  - 1° to improve competition, the tender should be screened and revised to eliminate possible competition-restricting requirements;
  - 2° the tendered newbuilt should be used to replace the old one (on the Jade River);
  - 3° the open parts of the German market should be kept open;
  - 4° a fleet of public dredgers should not be built to replace the better-performing privately-owned dredgers;
  - 5° Germany should introduce measures that increase level playing field, not reduce it !

- In the case of the dredging market, nationalisation is
  - 1° a form of protectionism, as without public tender, all competition is eliminated;
  - 2° NOT providing protection against unfair trading practices;
  - 3° an unfair trading practice that will negatively impact the domestic economic growth and welfare (increasing costs, reducing jobs and limiting added value);
- Concluding remarks:

Protectionism is clearly not a medicine but rather a poison pill;
- Unless a suitable answer is found, the competition from China and other emerging countries will continue to grow in the next years, with sometimes 'erosive' consequences for the Western economies: *unfair competition practices are like coastal erosion: markets are eroded and lost at a steady pace; left untackled in the long-term, they can wear out even the most resilient of companies.*

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“Protectionism is clearly not a medicine but rather a poison pill.”

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## PARTICIPANTS AND GUESTS AT THE EUDA 2017 ANNUAL CONFERENCE

Held every year around the 15 November in Brussels, the EuDA 2017 Annual Conference took place in Stanhope Hotel and gathered eminent representatives from the industry, the European and national administrations as well as other key stakeholders.









## EuDA promotes worldwide Market Access and Level Playing Field

Under the European Dredging Association (EuDA), the European Dredgers have united their voice for more than 20 years to promote market openness and global level playing field to the European and international organisations.



## MEMBERS



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Baggerwerken Decloedt & Zoon N.V.  
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DEME Environmental Contractors N.V. (DEC)  
Dredging International N.V.  
Dredging & Contracting Belgium N.V.  
Eraerts Dragages et Entreprises S.A.  
Fédération du Dragage Belge A.S.B.L.  
GeoSea N.V.  
Jan De Nul N.V.  
Kalis S.A.  
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Boskalis Westminster Marine (Cyprus) Ltd.  
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### Estonia

Terramare Eesti OU



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### Gibraltar

Van Oord (Gibraltar) Ltd.



### Ireland

Irish Dredging Company  
Van Oord Ireland Ltd.



### Italy

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Societa Italiana Dragaggi SpA 'SIDRA'



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Baltic Marine Contractors SIA  
Dredging International N.V. (Latvian Branch)



### Lithuania

UAB Boskalis Baltic



### Luxembourg

Dredging and Maritime Management S.A.  
Dredging International (Luxembourg) S.A.  
GeoSea (Luxembourg) S.A.  
Societe de Dragage Luxembourg S.A.



### Netherlands

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Baggermaatschappij Boskalis B.V.  
Boskalis Nederland B.V.  
Boskalis International B.V.  
Boskalis Offshore B.V.  
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Vereniging van Waterbouwers



#### Norway

Van Oord Norway A.S.



#### Poland

Boskalis Polska Sp. z o.o.  
Van den Herik Polska Sp. z.o.o.



#### Portugal

Boskalis Sucursal em Portugal  
Dragapor Dragagens de Portugal S.A.  
Dravo S.A.  
Dredging International N.V. (Branch Portugal)



#### Romania

Van Oord Dredging and Marine Contractors  
Boskalis International B.V.



#### Spain

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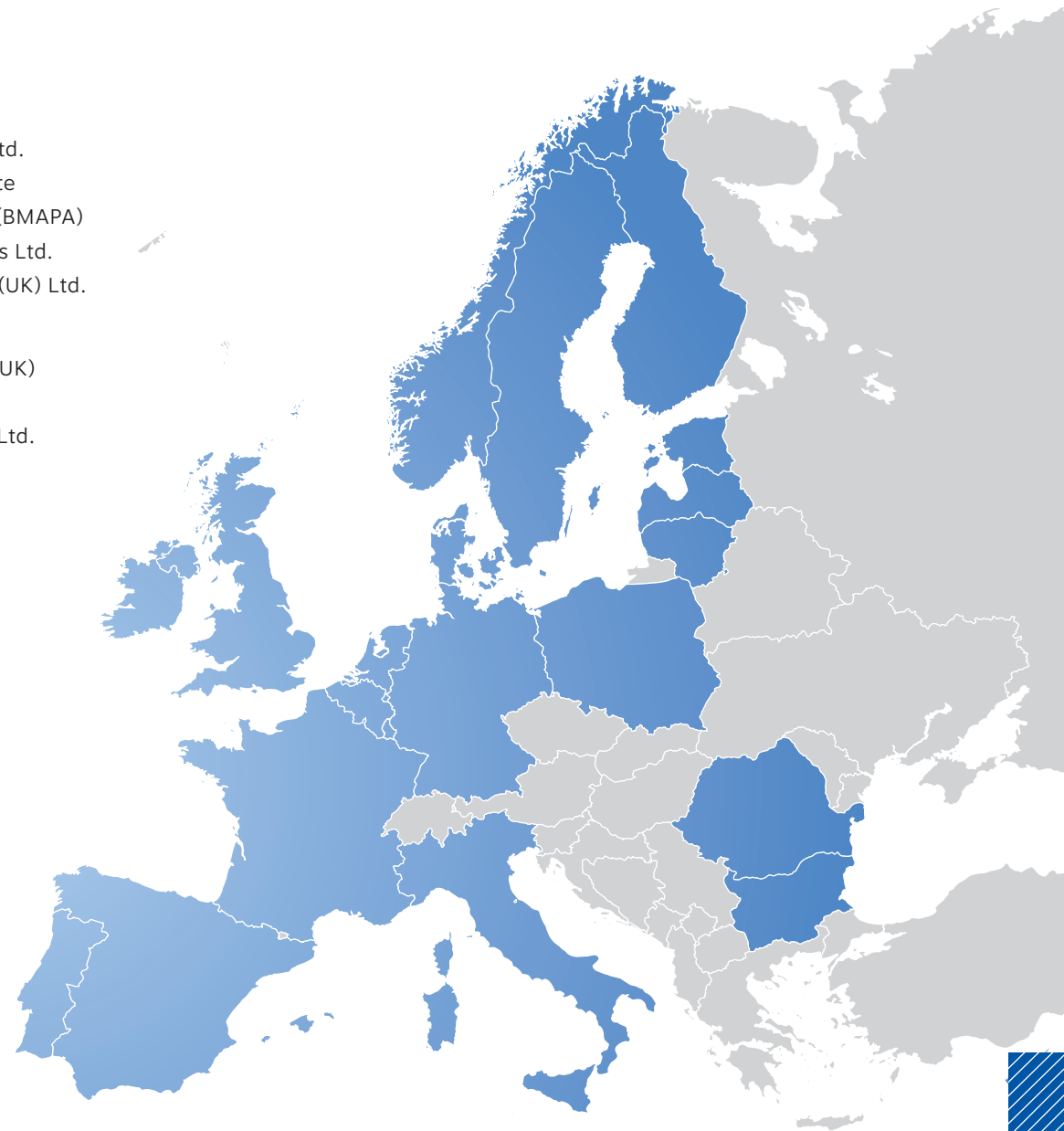
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#### UK

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British Marine Aggregate  
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DEME Building Materials Ltd.  
Dredging International (UK) Ltd.  
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Llanelli Sand Dredging Ltd.  
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## EUDA VERIFICATION COMMITTEE

The purpose of the Verification Committee is to independently verify the annual accounts of EuDA and certify that they are true, transparent and without irregularities towards all the members of EuDA gathering at the Annual General Meeting. The Members of this Committee are necessarily from a different member organisation than the EuDA Treasurer's.

2017  
Members of  
the Verification  
Committee



Mieke Fordeyn  
(Jan De Nul)



Hilde Vermeire  
(DEME)



EuDA will  
celebrate its  
25<sup>th</sup> Anniversary  
in 2018

## ABOUT EUDA

Celebrating its 25<sup>th</sup> Anniversary in 2018, the European Dredging Association ("EuDA") was founded in 1993 as a non-profit industry organisation for European dredging companies and related organisations to interface with the various European Union's ("EU") Institutions and also some International Organizations (such as IMO, HELCOM or ILO). EuDA members employ approximately 25,000 European employees directly "on land and on board of the ships" and more than 48,300 people indirectly (through the suppliers and services companies). The combined fleet of EuDA's members counts approximately 750 seaworthy EU-flagged ships.

Dredging activities are not well known by the wider public, but as a matter of fact, the European dredging companies, members of EuDA, are world market leaders with about 80% share of the worldwide open dredging market and a turnover of 7.7 bn Euro in 2016. Although 70% of operations take place outside Europe, 90% of the returns flow back to Europe.

The Association assists its members with all kinds of requests related to dredging issues, presently strongly focusing on Social, Environmental, Technical and Trade issues. These issues are coordinated by the Secretariat and executed by its specialised working groups composed of experts from the member companies.

EuDA has registered as Interest Representative Nr 2492574893-58 under the EU transparency register. The Association will pursue its goals by endorsing policies to create fair and equitable conditions for competition; commits to respecting applicable national, European and international rules and regulations; commits to operating its fleet safely, effectively and responsibly.



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