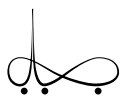


WORK PROGRAMME SEAPORTS 2014 - 2016

"All hands on deck!"





Theme 1 Dutch seaports and Europe



Theme 2 Mobility and transport



Theme 3 Entrepreneurship and the labour market



Theme 4 Sustainability and innovation



Theme 5 The seaports and their environment



Theme 6 Port cooperation and safeguarding national public interest

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1 Work Programme

The Dutch government, the five port authorities combined in the Branch Organization Seaports, the seaport industry and the Topteam Logistics / Logistics Strategic Platform are taking action, individually and conjointly, to secure and strengthen the economical competitive position of the seaports and the seaport industry. Even though the Dutch seaports are ranked highly in the international world, the choice for our ports, by shippers and investors, cannot be taken for granted. The contention for cargo is highly competitive; the petrochemical industry is in a tight corner. The international energy market is in transition and that has its repercussions on Dutch seaports. The ambition to meet these challenges head-on has resulted into a rolling work programme that periodically describes the priorities and efforts of all partners. Thus the partners, with their respective roles and responsibilities, can make optimal use of the available knowledge, visions of the future, ambition documents and ongoing policy initiatives from all participants.

Before you lies the first work programme with the actions for the period of July 2014 – December 2016. With this work programme the Dutch government, the port authorities, the seaport industry and the Topteam Logistics / Logistics Strategic Platform will reinforce the competitive position of the Dutch seaports. The ambition of these parties is for Dutch port infrastructure to continue to be the best in the world, for the market share of the Dutch ports in the Hamburg-Le Havre range to grow and for the increase of added value of the Dutch ports.

Urgent threats for Dutch seaports

This work programme focuses on the challenges faced by the Dutch seaports, the seaport industry and the government. It is aimed at providing a solution for the ongoing insecurity in international economic developments that the Dutch seaports and the seaport industry face on a daily basis and that threatens the position of the Netherlands as logistic world player and as 'Gateway to Europe'. These threats affect both the hub functions of the port regions and their function as location for local industry.

Regarding the hub function it is obvious that, especially in the container transport sector, the competition is increasing due to the scaling-up of vessels and terminals, the forming of alliances between shipping companies, more flexible worldwide trade routes, the rise of the southern European seaports and the optimization of the transport chains. In the industrial sector, we see that the petrochemical sector and the chemical processing industry mainly face the threat of higher (energy) costs in Europe, caused by the drilling of shale gas in the United States, the low CO₂ rates and the increasing refining capacity in the Middle East. Elaborating on ongoing projects and discussions from the Ministry of Economic Affairs with the sectors, this ministry is organizing a high level meeting. Here, all parties will discuss how the port regions can adequately deal with these latest developments.

This joint work programme consists of actions that have been proposed by all partners. These actions reinforce similar initiatives that have been nominated in the programmes for the top sectors and in the Dutch Social and Economic Councils Energy Agreement for Sustainable Growth.



The current trends and threatening developments demand a directed and a coordinated approach. Therein, the state focuses on a recognizable and meaningful prioritization to enable a level playing field with respect to the seaports in neighbouring countries, on rapid and uniform frameworks for decision-making and licensing, on adequate investments in the necessary infrastructures and hinterland connections, and on clear and powerful industrial and energy policies. The seaport authorities provide shipping companies and companies with a future-oriented port development with an attractive location of establishment where the seaport industry can make use of a high-quality service with co-siting, flexible multimodal connections and high-quality IT environment.

Dutch seaports operate on an international playing field. Not only do they compete with other foreign seaports in the Hamburg-Le Havre range, but also with emerging ports in southern and eastern Europe. It is of great importance that all ports abide by the same rules when it comes to legislation, standards, enforcement and tax measures. The level playing field deserves our undivided attention for the next few years. The Dutch government will commit itself to obtain more transparency from the EU and strive for the dismantling of state funding. After all, an economically healthy industry has no need for the support of state funding. In addition, interim actions will be undertaken in order to reduce the negative effects the funding of neighbouring ports has on Dutch seaports. This includes actions for a timely realization of the Hinterland connections (a third rail track in Germany, the so-called Betuweroute), an acceleration of the decision making by the Crisis- and Recovery Act, participation in the customized approach to reduce the regulatory burden, research on the international level playing field regarding inspection charges in seaports, including the internalisation of inspection costs, and the prevention of nationalised overhead. This means inter alia paying attention to the reduction of requirements based on means (how to accomplish) in favour of requirements based on the target (what to accomplish). The principle of equivalence is our starting point.



The work programme also implements the recommendations of the OECD in order to find a better equilibrium between benefits and negative impacts of the port city and the region around the seaport. The partners in this work programme accomplish this by working actively on a better added value, a better connection from the city to the port, the further professionalization of the Dutch seaports and the increase of their impact. The measures in this work programme aim to provide the necessary development space for seaports in the upcoming decades and to reduce the environmental impact of the seaports in the surrounding residential and natural areas. Special attention is paid to the Dutch Programmatic Approach to Nitrogen.

The measures in the work programme are targeted at strengthening the position of seaports in the logistical chain and at reinforcing the hinterland connections. The port infrastructure of the Netherlands is among the finest in the world, but continuous investments are necessary to keep the required quality and capacity up to speed. It is of the utmost importance to implement improvements promptly in order to prevent congestion. This priority is reflected in the required infrastructure investments in the Multiannual Programme Infrastructure and Transport and in the activities of the logistics sector. Particularly the developments surrounding rail freight require explicit attention and support in the upcoming years. With the Long-term Railway Agenda and the Strategic Plan for Freight Transport by Rail, the outlines have been drawn. The connectivity of the ports also requires a comprehensive, coherent and multimodal approach. This is designed in the new mobility approach, with an explicit focus on innovative ways to improve the deployment of existing infrastructure and to hasten processes if so required.

Finally, this work programme pays attention to the many initiatives and developments in the seaports with respect to (industrial) transitions, innovations and sustainability. These are important in order to limit the ecological footprint of the seaport industry and reinforce its licence-to-operate, but they also provide economic opportunities. This allows seaports to be incubators of innovation that will affect the rest of the Dutch economy. For all these challenges, this work programme specifies which initiatives the partners are willing to undertake, individually and conjointly, in order to create the appropriate framework and eliminate the obstructions in favour of the further reinforcement of the Dutch seaport economy.

..... but they have a strong position

Dutch ports are doing well from an international point of view. This becomes apparent when we look at their high ranking in the 'Global Competitiveness Report' and the 'Enabling Trade Index' of the World Economic Forum. The seaports form a vital infrastructure for the Dutch economy and for housing important industrial clusters. Partly for this reason, the ports of Rotterdam, Amsterdam, Zeeland, Groningen and Moerdijk have been marked as ports of national importance in the National Policy Strategy for Infrastructure and Spatial Planning. Given their European economic interest, the ports of Rotterdam and the North Sea Channel area, first and fourth port of Europe respectively, belong to the European 'core network' ports. Finally, the port of Rotterdam, being Europe's largest seaport, finds itself in a special position.

The seaport authorities and the seaport industry implement their own strategic visions and agendas. Operating from within its own specific responsibilities and possibilities, the state reinforces the position and potential for development of the seaport cluster for the good of the Dutch economy and society with the hereafter described prioritization and the deployment of its instruments.

The strong position of the Dutch seaports however, cannot be taken for granted. Due to international economic and geo-political developments, the flow of goods is more volatile than ever, the insecurity has increased and even the processing industries in the European ports are subject to strong international competition. We must therefore strive for a continuous vigilance and response from the port industry, the port authorities and the national government in order to maintain the strong position and to reinforce it when needed. The separate parties cannot do that on their own. Achieving the maximum economic yield from our seaports requires well-coordinated actions from the port industry, the port authorities and the national government. For the next two years, this work programme, which consists of 6 concrete priorities linked to a well-directed action agenda and a knowledge agenda, will give shape to these ambitions. In the upcoming years, the Minister of Infrastructure and the Environment, in cooperation with the Minister of Economic Affairs, will play a coordinating and, if so required, an initiating role in facing the challenges to come.

.... and they are of great importance to the Netherlands...

The Dutch seaports and the Dutch seaport industry are of great importance to the Dutch economy and labour market. In the last issue of the Havenmonitor, the added value of the Dutch ports was rated at 6% of the gross domestic product (362 billion Euros) and the direct and indirect employment of 284,000 workers. From a survey that was conducted by Buck Consultants in 2013, where contrary to the Havenmonitor, the forward indirect effects were also taken into account, which resulted in even higher figures; 8.8% of the gross domestic product and over 395,000 jobs emerge from the seaports. In 2013 Dutch seaports had a joint cargo handling turnover of 600 million tonnes of goods.

Seaports provide a good international accessibility of the Dutch economy and thus they contribute to the reinforcement of both the business climate in the Netherlands and its competitive strength. The seaports create a worldwide connectivity, which contributes to cost reduction and a higher security of supply for Dutch citizens and businesses. All Dutch seaports have a good competitive position in their own market segment due

to their seaward accessibility, the high-quality and efficient organization in the port complex and the quality of the multimodal networks that connect them to the European hinterland. In addition to this hub-function, the industrial clustering of high-value companies from the top sectors of (petro) chemicals, energy, logistics and water industry is also of undeniable national economic value. The Dutch seaports belong to the most diversified ports in Europe; this diversity enables them to cope with the fluctuations in the economic circumstances. Especially in the port regions where various sectors come together, there is a multitude of opportunities for cross-sectoral collaborations that lead to intensive land use, co-sitting and cost reduction. Clustering leads to unique opportunities for innovation and sustainability.

...which requires continuous attention.

The developments in the seaports are never at a stand-still and their importance for the Dutch economy is substantial. This work programme should be regarded as a snapshot, taken in the décor of current insights to discover the best actions to face the most urgent challenges together. However, the rapid succession of recent developments requires us to make intermediate adjustments and take additional measures. Given these dynamics, the idea of a Policy Note for the next ten years has been discarded; instead a rolling work programme for periods of 2 years will be used. This enables the partners of the work programme to monitor the current developments and adjust the agreements accordingly when necessary.



1.1 Guiding principles and priorities

This work programme is the result of a collaboration of all parties. In it, we seek to create the perfect balance in three 'guiding principles': to create added value through cooperation, to reinforce entrepreneurship in seaport regions and to promote interaction between seaports, established businesses and the surrounding habitat. Therefore, a limited list of agreements was selected, based on urgency, feasibility within the scope of this work programme (July 2014 – December 2016) and the expected added value compared to that of existing active initiatives. Further elaboration is carried out in accordance with competition regulations, including state funding.



This prioritization does not imply that other current (policy) operative initiatives are less important or will be annulled. On the contrary. The agreements in this programme are complementary to the active initiatives from the Ministry of Infrastructure and the Environment such as: the implementation of the National Policy Strategy for Infrastructure and Spatial Planning, the Multi-Year Infrastructure, Spatial Planning and Transport Programme (MIRT), the LongTerm Rail Agenda, the Programme for better use of existing infrastructure (Beter Benutten) and the Programme for a new comprehensive Spatial Planning Act (Eenvoudig Beter). In addition there are relevant long-term policies from the Ministry of Economic Affairs, such as modern industrial policy in the form of the Business Policies with top sector approach, the Sustainable Energy Policy and the Dutch Social and Economic Councils Energy Agreement. Furthermore there are operations in progress to reinforce the competitive position of top sector Chemistry in the refining industry.

The actions in this work programme aim to add focus and acceleration to the economic recovery of Dutch seaports for the upcoming years in a relatively short period of time. The priorities that have been mutually agreed upon by all partners converge with the importance of the ports for the Dutch economy and also the urgency of the challenges the seaports are currently facing.

1.2 Priorities

Based on the guiding principles, the partners have appointed a number of priorities from the work programme for the next two years. An action agenda and a knowledge agenda have been linked to these priorities.



1. Dutch seaports and Europe

Together, the partners strive for a level playing field for all port authorities and seaport industry in Europe. In that aspect, actions are and will be undertaken, namely towards the European Commission, in order to establish clear guidelines for state funding of seaports and the ascertainment of the European Port Package (containing financial transparency between the governments and the port authorities). The partners will also have to undertake joint initiatives to apply for as much European funding as possible for (co-)financing important Dutch infrastructural projects.



2. Mobility and transport

In recent years, the state has invested considerably in the maritime access of Dutch seaports and the hinterland connections and will continue doing so in the upcoming years. The MIRT project book includes a summary of the current projects, in various stages of exploration, plan development and implementation, which benefit the spatial development and mobility of the seaports. Within the applicable MIRT- framework, priority has been given to invest in the earning capacity of the Netherlands and as such in the mobility of the Dutch seaports. With the Crisis and Recovery Act and the upcoming environmental regulations, the decision-making and implementation of relevant port projects are being optimized. Now that the economy is showing the first small signs of growth, we must prepare for an accelerative effect on the increase in the flow of goods to and from the ports and to prevent any future stagnation and congestion in a timely manner. The partners of this work programme have a mutual and supra-local interest in good and accessible connections for all transport modes to wit: road, water (inland waterways and short sea), tracks, and pipelines to the hinterland. In line with the actions from the Logistics Top Sector, the Multi-Year Infrastructure, Spatial Planning and Transport Programme, the Long-term Railway Agenda and the new Mobility Agenda, the partners are taking action to reinforce the current and future mobility of the seaports. The knowledge agenda will help to further examine some infrastructural bottlenecks.



3. Entrepreneurship and the labour market

The National Government is working on further reduction of administrative and regulatory burdens for businesses, inter alia by further elaborating the customized approach to reduce the logistics regulatory burden and by streamlining the supervision by the regional authorities. This means that the use of regulatory requirements based on target will be explicitly favoured over requirements based on means. In addition, the port industry, in cooperation with the state, the regional and local public authorities and the social partners, is developing educational and labour market initiatives in order stimulate and link the labour potential in the

cities to the (future) needs in the ports. Thus, a connection is made to the Human Capital Agendas of the top sectors and the Technology Pact.



4. Sustainability and innovation

With this work programme, measures will be taken to support and facilitate the various sustainability initiatives regarding sustainable energy and the transition to a bio-based economy within the Dutch seaports. Furthermore the overlaps in terms of innovation will be mapped by the seaport authorities, the seaport industry and the relevant top sectors. Based on this opportunity map, the joint innovation projects are linked where possible and knowledge is shared. This opportunity map focusses on sustainability and innovations that can reinforce the competitive position of the Dutch seaports, such as logistics optimization, the use of residual heat (Deltaplan Energy - Infrastructure), Exploitation and storage of CO₂ (Rotterdam Capture and Storage Demonstration Project ROAD) and alternative fuels such as Liquid Nitrogen Gas. In this context, activities are being developed to reinforce the connection of the seaports to the scientific network, including Smartport and the NOW-programme 'the Green Brain'.



5. The seaports and their environment

Without exception, all Dutch seaports operate in the vicinity of residential, recreational and natural environments and they are continuously in active search for the balance between economy and ecology. To optimize the use of scarce space, the best practices and bottlenecks are mapped with Natura2000. The issues in Natura2000 regarding seaports are examined and addressed in consultation with the port authorities, the port industry and the public authorities. Furthermore, the nitrogen issues in the seaports require constant attention. The partners in this work programme are actively involved in the preparation of the Programmatic Approach to Nitrogen, in view of enabling the anticipated growth of the seaports under this approach. In future, they want to monitor the use of the Programmatic Approach to Nitrogen instruments for seaports.

In addition, initiatives are launched to achieve an effective seaport-transcending employment of physical space and environmental space. The focus is on the effective use of options in the Crisis and Recovery Act. In this context, experiments have been appointed for a well-aimed regional approach in Rotterdam and Delfzijl – Eemshaven; other regions may join in. The seaport authorities explore the options for optimizing the use of the physical and environmental space within and between the Dutch seaports.



6. Port cooperation and safeguarding national public interest

Port cooperation is an important precondition for effectively addressing the challenges in this work programme and for reinforcing the international competitive position. In this context, the currently active initiatives to obtain structural forms of cooperation within and between the various port areas will be further intensified.

The strong national interest regarding seaports justifies further reflection on the involvement of the national government in seaports in order to safeguard this national interest. Within the framework of the 2013 State's holding-policy paper of the national government, the national interests that need safeguarding will be described and it will be reviewed whether new State shareholding in seaports is expedient.



1.3 Final provisions

Upon signing this work programme, all partners endorse the vision and ambition as they are described. This vision and the ambition are elaborated in further work agreements in the action and knowledge agendas. The parties commit to these agreements for as far as is expedient within their role and responsibilities. The parties agree with the assigned roles for the various actions as described in the action and knowledge agendas.

Front-line participation implies responsibility for the implementation of the concerning actions, ensuring the optimal involvement of the abovementioned parties and the periodic reporting on the progress and impact thereof.

In addition to the parties involved in the work programme, the involvement of third parties may be necessary for implementation of the programme. This includes the involvement of inter alia local and regional public authorities and branch organizations that have been consulted where possible during the preparation of this work programme. Formal coordination sessions are indispensable for the implementation in view of the interests involving inter alia spatial development, the environment, nature, traffic and transport and (in some cases) the role of shareholder. It is the responsibility of the primary responsible party, which is named at each work meeting, to involve this party (or parties) in a timely manner. The agreements in this work programme are not enforceable by law.

Timeframe

This work programme will come into effect on July 1st 2014 and end on December 31st 2016. In the autumn of 2015, the parties shall start a trajectory to evaluate the implementation of this work programme and decide on an actualization and continuation of this work programme for the period after December 31st 2016.

Governance

The project group that has worked on the compilation of this work programme on behalf of the partners will be charged with the implementation, the prioritizing and the monitoring of the implementation of the agreements. These are described in the action agenda included in this work programme. The Ministry of Infrastructure and the Environment will coordinate and provide the secretariat for the implementation of the work programme.

The project group will meet once per quarter to discuss the progress of the implementation.

In case of obstacles in the implementation of the work programme, the project group will decide on the approach that is to be followed in accordance with the circumstances. In case interim developments give rise to adjusting the work programme, the parties will consult with one another, after which the agreement can be altered.

The business content of this work programme will be published in the *Staatscourant*.



1.4 Thus agreed on June 25th 2014 in Rotterdam

Partners:

Ministry of Infrastructure and the Environment

Ministry of Economic Affairs

Port of Rotterdam

Port of Amsterdam

Port of Moerdijk

Zeeland Seaports

Groningen Seaports

Deltalinqs

ORAM

Brabants-Zeeuwse Employers Cooperation

Cooperating Port Industry Eemsdelta

Topteam Logistics / Logistics Strategic Platform

colophon

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