

ANNUAL REPORT
2021

European Dredgers
work on and invest
in all Facets of
our Sustainable Future



EUROPEAN DREDGING ASSOCIATION





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

EUDA'S SUSTAINABILITY STATEMENT

Organisations as well as individual companies interact directly or indirectly with the environment through what they do and how they do it.

What dredging companies do is projects. Well-designed multiple purpose projects can contribute to sustainability by adding value to the environment, the economy and society during the entire life cycle of the infrastructure.

How dredging companies do projects can also provide substantial contributions to sustainability during the execution of the project (e.g. construction of infrastructures) by reducing impacts on or improving the state of the environment and/or society (e.g. use nature-based solutions, train & educate local workforce).

“Sustainable Public Procurement
is a major opportunity for Europe
to seize”

What EuDA does is to interface between the dredging industry and the European administrations. EuDA's contribution to sustainability results from the adaptation and improvement of the EU regulatory and governance frameworks in order to facilitate and maximise EuDA's individual members' contributions to sustainability.

How EuDA does it is referring to the environmental footprint of the secretariat's activities and the steps taken to reduce it (such as digital Annual Reports).





With its Green Deal, Europe ambitions to tackle great global challenges, such as climate change and environmental degradation, that pose existential threats to both Europe and the world.

These global challenges can be turned into opportunities for Europe and a new European growth strategy was designed accordingly by the EU.

As key enablers of the Green Deal, European dredgers exemplify the future-oriented and solution focused sectors that continuously invest to improve their environmental footprint and provide innovative sustainable solutions to their clients (including protection against sea level rise, flood protections, marine habitats restoration).

Sustainability, our common Vision.

BUILDING A LONG-TERM GREEN VISION FOR OUR SUSTAINABLE FUTURE



MESSAGE FROM THE BOARD

2021: Europe is at a Turning Point

Although the health issues and economic disruptions due to COVID are not over yet, many lessons can be drawn from the hardships we had to go through. With the disruption of the “world’s workshop”, the global supply chains in Europe and around the world were severely affected. This situation has exposed a new weakness in Europe’s global economic model: it is too reliant and dependent on the production in one country. Europe needs to become more “**strategically autonomous**”: it needs to diversify its supply chain and keep the knowledge and control over its core strategic economic activities. In the words of Ursula von der Leyen, President of the Commission:

“Europe can – and clearly should – be able and willing to do more on its own”.

Europe aims at preserving its key industries. *NextGenerationEU*, EU’s Economic Recovery Plan, will help restart and possibly reshape the economic activities around Europe. Under the circumstances, it is the right time to initiate a conversion of Europe’s economic activities towards becoming greener and more resilient:

Europe is at a turning point in terms of economy, environment, security and the protection of its core societal values (including the rule of law).

The top priority of the European Commission is the **Green Deal**. Within the three sustainability pillars, the EU Green Deal aims at rebalancing the environment with regard to the EU economy and society. With its Green Deal, Europe is taking action to tackle the most urgent negative externalities caused by its economic activities: **climate change** (by reducing emissions of greenhouse gases and boosting climate change adaptation), unsustainable **use of resources** (biological, energy, water, spatial), increased amount of **waste** (by increasing the implementation of circular economy principles in all economic activities) and **pollution** (in the air, the water and the soil).

The Green Deal’s foremost objective is to achieve the goals of the Paris Agreement and be climate neutral by 2050. The European Climate Law adopted in June 2021 is a Regulation (EU 2021/1119) part of the Green Deal package that makes cutting GHG emissions a legal obligation for the EU Member States and takes policy makers and regulators in unknown territory.

EuDA welcomes the Global Gateway which embodies Europe’s new connectivity strategy. With an improved and more diversified connectivity to the rest of the world, Europe’s strategic autonomy should be significantly reinforced.

In 2021, EuDA focused on:

- 1) the trade relations inside and outside the EU;
- 2) the EU “Fit for 55”;
- 3) the Green Taxonomy

The Trade relationships inside and outside the EU

EuDA is committed to keep improving level playing field and opening markets inside and outside Europe. This is why EuDA welcomed the recognition that China is also a ‘systemic rival’ by the EU Institutions and Member States in March 2019. The Joint Communication by the Commission and the High Representative on Foreign Affairs, *“EU-China – A strategic outlook”*, has listed 10 actions that are shaping the current and future EU trade policy. EuDA also welcomed the Commission’s guidance on the *participation of third country bidders in the EU procurement market*, which was the first completed action from the 10 requested by the European Council. However, this very useful guidance needs further promotion among the Member States’ administrations.

“Europe needs to become more strategically autonomous.”

2021 Members of the EuDA Board

Alan Lievens
(Chairman)



Jeanette Rohde
(Vice Chairman)
(Rohde Nielsen)



Peter van der Linde
(Treasurer)
(Boskalis)



Mieke Fordeyn
(Jan De Nul)



Govert van Oord
(Van Oord)



Jens Schmidt
(Hegemann - Dredging)



Kees van de Graaf jr.
(Dutch Dredging)



Éric Tancre
(DEME)



Andrea Vollebregt
(Vereniging van
Waterbouwers)



The International Procurement Instrument (IPI), the proposed regulation on Foreign Subsidies (FSR), the regulation on screening of Foreign Direct Investment (FDI screening), the EU Global Gateway are other examples of further implementation of and progress on these critical 10 actions.

EuDA has further developed and promoted its own **strategic toolbox** that contains a series of existing or needed trade instruments to fill the gaps in European law regarding the unfair trade practices used in Europe by non-EU State-owned Enterprises. The most useful instrument for preserving level playing field in the procurement for dredging as well as construction projects is a Trade Defence Instrument for Construction Services (not included in the '10 actions' list, above, because it is sector specific). Although services represent the most important part of our economies, they are still not covered by a WTO protection system like the products enjoy for decades. The challenge is

big but the dredging and construction industries are ready to rise up to the challenge and joined forces to this effect.

EU “Fit for 55”

Part of the EU Green Deal initiatives, “Fit for 55” is a package of existing initiatives and new proposals aiming to make the EU’s climate, energy, land use, transport and taxation policies fit for reducing net greenhouse gas emissions by at least 55% by 2030. EuDA welcomes this legislative package and the EuDA members are ready and willing to constructively contribute to its success. The work of EuDA on CO₂ emissions since 2008 and its **CO₂ Strategy** provide essential insights for the European dredgers’ contribution to the Green Deal. There is a clear focus on initiatives like the extension of the EU Emissions Trading System (ETS) to shipping and the FuelEU initiative where EuDA can propose practical solutions and approaches to achieve the policy objectives for the dredging industry.

The Green Taxonomy

EuDA joined the Commission’s Platform on Sustainable Finance and took part in the work on construction and civil engineering with the other nominated experts to determine technical screening criteria for significant contribution and for do no significant harm regarding the two climate change objectives (mitigation and adaptation) and the four environmental objectives (use of water resources, restoration of biodiversity and ecosystems, pollution prevention and control and circular economy).

The workload was immensely underestimated but nevertheless the criteria that will be ultimately produced by this group of experts will be crucial in determining Europe’s future path towards sustainability.

With our best regards,

Alan Lievens, Chairman

and his colleagues of the Board of EuDA.





IN MEMORIAM

Goodbye, Philippe Matheï!

Philippe Matheï has been the face of the Belgian Dredging Federation for decades. Just before COVID, he had to step down due to illness and we learned the sad news that he passed away on 14 November 2021, only days after our 2021 General Assembly.

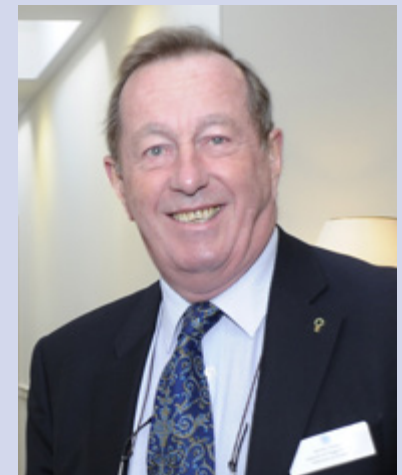
He was an experienced lawyer and accomplished diplomat who dedicated most of his career representing the interest of the Belgian contractors (in construction and civil engineering): he had been the General director of ADEB (Belgian Federation of civil works) and of the Belgian Dredging Federation. He has shaped part of the dredging legislation in Belgium.

His personal merits received royal recognitions as he was awarded the titles of “Chevalier de l’Ordre de Léopold” and “Officier de l’Ordre de la Couronne”.

On behalf of the EuDA Board of Directors and all the EuDA members, we would like to express our sincere condolences to his family and friends for the passing of Philippe Matheï and our gratitude for his dedication to EuDA for so many years.

*Thank you, Philippe
You will always be remembered!*

Alan LIEVENS, Chairman



Philippe Matheï

Balance is the basis for both sustainability and level playing field. Tackling sources of significant imbalances is a fundamental objective for achieving global sustainability and global competitiveness. The internalisation of positive and negative externalities allows for the proper consideration and integration of the impacts on the economy, on the environment, on the human working and living conditions, in order to make a sustainable investment or economic decision.

Sustainable Markets, our common Priority.

CHAMPIONING A WORLD WIDE
CHAMPIONING A WORLD WIDE
LEVEL PLAYING FIELD
LEVEL PLAYING FIELD



INTERNATIONAL MARKETS

In 2021, EuDA's work on trade issues focused on unfair trade practices by non-EU State-owned Enterprises (SoEs), market access restrictions and competition distortions in Europe and around the world.

Access to the US dredging markets

The US is still the largest economy in the world and a global free trade champion. The US also represents a huge dredging market that is closed to foreign competition for over a century. Since the creation of EuDA in 1993, European Dredgers have repeatedly attempted to open the US market. In 2013, EuDA started a long-term lobbying campaign and supported the EU Commission with negotiations for a free trade agreement with the US (Transatlantic Trade and Investment Partnership- **TTIP**). With the new President taking office in 2017, the political priorities changed and TTIP negotiations were ceased very quickly. When the political willingness to improve trade relations between the EU and US returns,



EuDA's strategy to argue for the opening of the US dredging market will be reactivated: with a minimum of legislative changes (focusing on the 1906 US Dredging Act, leaving the 1920 US Jones Act untouched), the US can open its dredging market to European contractors and obtain a significant increase of economic benefits and employment (with demonstrated added value, cost reductions and time gains) in the US.

Partial nationalisation of the dredging market in Germany

Background

In 2016, the German Federal Government opened a public tender to build a 7,500 m³ Trailing Suction Hopper Dredger (TSHD) with the aim of extending its State-owned dredging fleet from one to two TSHD's. The German government's plan was to deploy the newly built TSHD for the execution of maintenance dredging works on the Elbe. These works are so far procured via public tendering processes.



The key issue is that the German government's strategy of acquiring more dredging vessels (including possibly a second TSHDs of 7,500 m³ and water injection dredgers) will result in **further closing down 25% of its maintenance dredging market** (partial nationalisation).

Therefore, EuDA worked closely with the Vereinigung der Nassbaggerunternehmen (VdN), the German Association of Dredging Companies. The early analysis of the situation revealed that our strategy would need to be more political than legal and that action at local level should be prioritised (while action at European level should be used in a second phase).

Key points of the VdN strategy

In highlighting the important contribution of maritime transport, including the strategic maritime infrastructures, to trade and economic development in Germany, VdN (the German Association of Dredging Companies) also highlighted the high efficiency and

2020
Members
of the
MarkCom



Pierre Potvliege
(Chairman, EuDA)



Alan Lievens
(EuDA)



Kobbe Peirs
(Jan De Nul)



David Luttj
(Jan De Nul)



Yves Cornardt
(DEME)



Robert Poelhekke
(NABU)



Robert Middelhoek
(Van Oord)

reliability of the highly specialised and capital-intensive companies carrying out the dredging activities. State interventions in the economy are traditionally targeting strategic infrastructures, ensuring also a minimum level of technical know-how for decision-making. But these interventions should be kept to a minimum (and not substitute private contractors for public ones).

Public procurement is the process by which public authorities, national, regional and local, purchase from companies work, goods or services at all stages of a project.

To this end, VdN advised that the German Shipping Administration should keep **only one hopper dredger** in operation (keeping technical know-how inside the administration) to avoid further closing down its market. For the last few years, VdN has also communicated this message to German politicians and decision-makers from the national and federal

administrations, recommending “not to approve the budget to build a second hopper dredger” to replace the “Nordsee”, which would ultimately conflict with the legal requirement of a 25%/75% share between the public and private fleet for the coverage of navigational dredging in Germany.

Milestones in delivering the strategy

VdN has achieved key milestones:

- establishing itself as a competent, constructive and reliable partner with a **wide and influential political network in Germany**;
- raising awareness on and obtaining further recognition of the strategic importance of the dredging sector;
- having its position better understood, better perceived and much more generally accepted;
- establishing a structured annual dialogue with the administration in charge of the Waterways and Shipping (*Generaldirektion Wasserstraßen und*

Schifffahrt- GDWS) to constructively discuss and ensure, for instance, safe access to Germany’s ports.

Issues with the Government’s Newbuilding

The newbuilt ordered in 2016 to support the “Nordsee” (both ships were to operate in parallel) has been facing severe delays from a very early stage. After more than 2 years delay on the ship delivery, at the beginning of 2021, the shipyard stopped the production of the government procured dredger (+/- 80% completed). Following serious discussions with the authorities, the building works restarted on the commissioned new dredger with a 30% budget overrun. Later in the year the shipyard (Pella Sietas GmbH) building the new government dredger was declared bankrupt.

At this stage with 85% of the newbuilding complete, nobody knows what will happen (whether the construction would be completed and sold/kept or abandoned).



Lara Muller
(Boskalis)



Vincent
Detemmerman
(CC-CB)



Wim Vogelaar
(Boskalis)



Paris Sansoglou
(EuDA)



THANK YOU, Sigi!

In 2009, Sigmund Schlie became chairman of the Vereinigung der Nassbaggerunternehmen (VdN), the German Association of Dredging Companies. In his mandate, he ceaselessly worked in improving VdN's visibility and the understanding of dredging activities with the German authorities.



Sigmund Schlie

There was a turning point in 2016, when the German authorities took decisions that would ultimately result in a further nationalisation of Germany's dredging market. With the support of his members, he started a successful lobbying campaign, supported by a strengthened VdN secretariat. His cooperation with EuDA has always been strongly appreciated in the Board and during the AGMs.

On behalf of the EuDA Board, I would like to take this opportunity to wholeheartedly thank you, Sigmund, for the good cooperation with EuDA over the past 12 years and the significant increase of visibility you have brought to the dredging industry in Germany.

We wish you all the best in your new endeavour and welcome your successor Mr Jens Schmidt, already member of our Board and who, for many years, was part of the VdN management team and directly involved in its lobbying activities.

Thank you, Sigi. Good luck to you and Farewell!

Alan LIEVENS, Chairman



Overview of activities in 2021

German Elections

Most important political decisions were postponed in the year preceding the German elections of September 2021.

CCCC¹ in Germany

In their strategy to enter Europe, Chinese dredging contractors quickly identified Germany as the most liberal EU Member State in terms of access to its public procurement market. Therefore, many attempts of Chinese SoEs to enter the European dredging market targeted maintenance works of Germany's main rivers, such as the Weser, the Elbe and the Ems.

CCCC established a subsidiary in Hamburg with a broad scope of activities in and around construction (including dredging). The first Chinese contractor to participate in a German tender was CCCC Dredging Group, which managed to qualify in the Weser tender but was not awarded the contract. Then CCCC Dredging Group also qualified in the Elbe tender. They made the lowest bid but were ultimately disqualified (see also chapter on unfair practices by non-EU SoEs' in Europe).

German law on monitoring acquisitions

Following the acquisition of Kuka by a Chinese SoE, Germany revised its legislation to give its administration

the legal means to stop further unwanted acquisitions (of strategic companies). Thanks to these legislative changes, Germany stopped the acquisition of IMST and of 50Hertz by Chinese SoEs.

Other EU Member States dispose of similar legislations but not all. Europe needs to complement its Regulation on Foreign Direct Investment Screening with provisions to allow concrete action to be taken.

Next Steps

With the German election, a new post-Merkel era started in Germany. A new German coalition government, with the Social Democratic Party, the Greens and the Free Democrat Party, took office in December 2021. This means that there will be room for a more pragmatic and reciprocal approach towards China: no more "*Wandel durch Handel*" (*change through trade*).

Unfair trade practices by non-EU State-owned Enterprises

Background

Many of the trade practices used by non-EU State-owned Enterprises (SoEs) have the potential to significantly distort competition (with foreign State subsidies). Most of the cases affecting European Dredgers emanate from



the Chinese State-owned Enterprises. For over a decade, EuDA has been actively involved in counteracting or reducing the impact of unfair trade practices by Chinese State-owned Enterprises (SoEs) worldwide. In a position paper, EuDA described how the Chinese domestic market is de facto closed to European dredgers. EuDA was involved in countering the first case of unfair practices to win a dredging project inside Europe (the Case of Swansea Bay Tidal Lagoon in 2015). Building on these examples as well as on cases of tied financing schemes (that close markets in Africa, South America and Asia), EuDA argued against recognising the Market Economy Status of China in WTO. Since 2018, EuDA is involved in monitoring and, where necessary, reviewing standards for dredging vessels proposed under ISO TC8 WG11 led by China.

Sense of urgency

These unfair trade practices have enabled Chinese construction contractors to triple their international market share over the past ten years from 7% to 21% globally and doubled in Africa from 28% to 56% at the expense of European international construction contractors. It has also to be mentioned that without Chinese financing, many of these projects would probably not have been financed nor executed for lack of economic sustainability. But considering only

¹ CCCC stands for China Communications Construction Company Limited.

the economically feasible projects, which European contractors had a fair chance of winning, the damage already caused by these unfair practices to the European Dredgers outside Europe is undeniable though difficult to estimate.

In a November 2018 report, (*"The Dutch and Belgian Dredging Industry Exploration of the Future"*, Erasmus University), the Rotterdam School of Management identified a significant growth of Chinese dredging SoEs worldwide.

This significant growth worldwide can be explained by the following actions by China:

- **protect domestic market:** Chinese SoEs execute the vast majority of the projects; the 2020 *"dual circulation"* policy, confirms that China views its domestic market as a possible source of renewed growth for its own companies, in addition to global trade;
- **finance capture export markets:** in the framework of the Belt and Road Initiative (BRI), China finances projects outside China and ties the financing to the exclusive execution by Chinese SoEs; besides tied financing schemes, China also uses political influence, mega-package deals and any other means available to exclude non-Chinese competitors;

- **make use of dominance in exposed-captured export markets:** in the third country markets where the Chinese SoEs have established either an oligopoly or a monopoly (absence of foreign competition), they can dictate higher prices for projects;
- **capture foreign-financed export markets:** thanks to State subsidies and lower standards, Chinese SoEs can further capture projects outside China, funded or financed by the EU or the World Bank, in particular where the minimum environmental, ethical and social standards are not effectively enforced by the lending institution;
- **acquire strategic assets and strategic companies:** Chinese SoEs acquire strategic companies with the aim of forcing the transfer of key knowledge/technology or to acquire strategic assets with the aim of gaining more exclusive market access to the detriment of the local/national interests.

Now that the Chinese SoEs are entering Europe's infrastructure market, it is high time for the EU to react to ensure that fair competition and level playing field remain the norm in Europe.

The tide is finally turning in Europe

Since 2019, a core majority of European politicians realised the ambiguity of the relationship with China,

which they described as a *"cooperation partner"*, a *"negotiating partner"*, an *"economic competitor"* and a **"systemic rival"**¹.

In this Communication, in order to refine Europe's approach to be more realistic, assertive and multi-faceted, 10 concrete actions (including making full use of trade defence instruments and our public procurement rules) were presented to the EU Member States.

- The European Commission published in 2019 a *"Guidance on the participation of third country bidders and goods in the EU procurement market"*². This guidance highlights that, among key functioning principles for public procurement, *"Art. 43 of Directive 2014/25/EU does not grant secured access to the EU procurement market to all third country operators"*. More specifically, unless a country is a signatory of the WTO Government Procurement Agreement or has signed a Free Trade Agreement with the EU, its **access to the EU public procurement market is not secured** and its companies can be rejected from tenders for this reason only.

- Europe needs to prevent foreign subsidies, foreign State ownership and other unfair trade practices from distorting procurement procedures and to

¹ 2019 Joint Communication on "EU-China – A strategic outlook" by the European Commission and the High Representative.

² Communication C(2019) 5495

“In the last 20 years,
European countries transferred
through their trade deficit over
2.7 trillion euros to China.”



ensure that firms benefit from fair access to both private and public contracts. In May 2021, the European Commission proposed a new Regulation on **“levelling the playing field as regards foreign subsidies”**. The purpose of this proposed regulation is to address distortions on the internal market caused, directly or indirectly, by non-EU (foreign) subsidies. Such a regulation would empower the European Commission to take actions both in public procurement procedures and in unwanted concentrations. With this proposal, the Commission is highlighting the importance of level playing field for a well-functioning European Single Market and for Europe’s prosperity. This gives a strong signal on how important EU competition rules, trade defence instruments and public procurement rules are in ensuring fair conditions for companies to work, grow and thrive in the Single Market.

Overview of activities in 2021

Building intelligence

In 2021, EuDA continued to gather information, experiences and issues with unfair competition from non-EU SoEs that the dredgers and other construction contractors face around the world. EuDA compiled an overview of the Chinese unfair practices in construction projects in Europe and around the world.

In light of this analysis, the following key aspects of China’s ‘going global’ strategy were identified:

- Overcapacity as an economic policy and trade weapon
China’s overcapacity was initially designed to support and maintain the long-term Chinese economic growth and employment. The first phase of this strategy was completed when the Chinese domestic market was saturated. The next phase is to go global to keep the capacity occupied.

When production capacity structurally exceeds consumption needs (overcapacity), supply will exceed demand (oversupply) and consequently market prices will need to readjust (price decrease); a decrease in prices will increase economic pressure on the less performing and older capacities (more costly to operate) that ultimately, unless protected by their State, will be forced to shut down (capacity rebalancing).

When capacity is rebalanced to match effective consumption needs, this process can induce shut-downs in any country involved in the concerned globalised market.

So China’s overcapacity policy also allows the progressive elimination of foreign competitors in third country markets, which in turn become more and more dependent on Chinese SoEs (sometimes in oligopoly or monopoly).

- State-owned Enterprises
State-owned Enterprises (SoEs), especially non-EU SoEs, are benefitting from significant political support as well as significant State subsidies that they can use to (unfairly) win markets in third countries and ... in Europe (where the State Aid Regulations do not apply to non-EU companies). All the Chinese companies involved in a ‘strategic sector’ on the global stage are either State-owned or State-influenced (companies depending on the financing from the State-owned banks). The State-owned or State-influenced character of the Chinese companies often leads them to behave or make decisions not reflecting Market Economy principles. In fact, Chinese SoEs are key instruments to fulfil China’s political and economic policies and ambitions.
- Asymmetric Relationships
Since reopening to the outside world in 1978, China has always made sure to gain more from its trade and economic partners than they gain from it. The cornerstone of this asymmetry is reflected in the difficulty for foreign companies to access the Chinese domestic market, which is benefitting from heavy protectionist measures, including restricted access to foreign companies and / or from discriminatory fiscal treatment in China.

- Belt and Road Initiative

The Chinese political system and government are characterised by their undivided control over the country and its economy. This undivided control was implemented through national rules setting and controls the majority of the economic players (including ownership). To implement (undivided) control outside China is a huge challenge. To this end, China established its Belt and Road Initiative (BRI) as a long-term political framework in order to secure logistical and strategic connections with key markets and resources. The BRI aims at increasing the geopolitical influence of China at any cost (including at the cost of business ethics, environmental performance or working conditions). Fuelled by China's overcapacity strategy, the BRI is also securing the continued growth of its State-owned contractors as these Chinese financed infrastructure projects outside China are reserved for them. These tied financed projects create more and more dependence locally leading to situations of oligopoly or monopoly in 'strategic sectors' (including dredging and construction) and may also become debt traps (for low-income countries).

- China's Acquisition Strategy and Vertical Integration

A significant part of the BRI Strategy is also to take control of key logistics nodes (or of companies in

sectors considered strategic by China), either through normal or forced acquisition processes. The Chinese government acquisition strategy also tends to integrate vertically to increase its dominant position in certain markets from the extraction of resources, their processing and their transportation. This also raises the question whether governments, as centrally controlled and mono-party as China, should not be subject to the same anti-trust, anti-cartel and anti-dominant position scrutiny and rules as the big private multinational companies?

The EU has long recognised the pan-European importance of critical infrastructures, including energy and transport infrastructures. However, as the COVID pandemic seriously tested the resilience of its logistics and supply chains, Europe needed to rethink its approach to critical assets and proposed in 2020 a Directive on the “*resilience of critical entities*”.

Energy and transport infrastructures are priority and strategic assets for Europe and need to be treated as such. EuDA is of the opinion that **all transport infrastructure should be treated as strategic to Europe** (meaning their planning, design, financing, construction, operation and acquisition should be monitored and checked against key strategic European criteria).

“Should economic interventions by centrally controlled governments (and their entities) not be subject to the same anti-trust and anti-cartel rules as the big private multinational companies?”

The Case of the Elbe

In 2021, German Waterways and Shipping administration published a tender for the maintenance dredging works of the Lower and Outer Elbe between Hamburg and Cuxhaven to guarantee the navigational depth.

A consortium led by CCCC was allowed to tender, made the cheapest bid (31.88% lower than the second-best bid) but was later disqualified for lack of technical and environmental soundness.

In 2020, CCCC had made a bid for the Weser maintenance works. Without being the cheapest, its bid was within the ballpark figure of its European competitors. Although geographically close, there were significant differences in terms of operational requirements between the works in the Weser and in the Elbe. The fact that there was such a huge difference of price for the Elbe bid by CCCC tends to demonstrate that the Weser tender was used to calibrate the pricing approach of CCCC to the German dredging market. The impossibly low bid by CCCC for the Elbe works raises suspicions that State subsidies were used in order to be awarded the project to the detriment of technically stronger competitors.

What this case highlighted was that there is a general lack of effective instruments to properly address the unfair practices by non-EU State-owned enterprises and that there is an urgency to take action.

Strategic Toolbox of Policies and Instruments

From the scale and wide range of Chinese unfair trade practices faced by the European Dredging Contractors, it is clear that **there is no silver bullet** to tackle them inside and outside the EU.

It is also clear that **the EU needs to urgently fill the gaps and tackle the loopholes in its legislation**. To this end, with the help of its high-level advisor, EuDA developed a comprehensive approach comprising multiple instruments and policies: **a European Strategic Trade Toolbox**. This toolbox would build on existing instruments, adapt some or create new instruments necessary to give an adequate response to these unfair trade practices.

In its European Strategic Trade Toolbox, EuDA has identified the following instruments:

- 1° Minimum European content in EU funded projects (50% of EU content);
- 2° Reciprocal Treatment in market access (International Procurement Instrument);
- 3° Regulation on Trade Defence Instruments for Construction Services;
- 4° Apply and enforce EU State Aid regulations to all companies (including non-EU SoEs) working in the EU (Foreign Subsidies Regulation);
- 5° Apply the Green Taxonomy minimum ethical, environmental and labour safeguards in EU public procurement and all EU financed projects;
- 6° Generalise the use of the Commission's "Guidance on the participation of third country bidders and goods in the EU procurement market".

Strong Cooperation and

Alliance with the Construction Associations

In 2021, EuDA joined forces with the construction industry (FIEC and EIC) and agreed to jointly develop the concept of Trade Defence Instrument for Construction Services (TDI for Construction). With the support of some Member States, including Belgium, a request for consultation on TDI for Construction





was presented to the Commission. Due to possible overlaps with ongoing proposals for trade instruments (proposal on International Procurement Instrument and proposal on Foreign Subsidies Regulation), the Commission decided to postpone any action on a new instrument such as a TDI for Construction.

EuDA, FIEC and EIC, joined by UNIFE, launched in May 2021 a joint website (<https://soes-in-europe.eu/map.php>), to highlight **facts and figures** showing the increased activity of non-EU SoEs in the European public procurement market in just over 10 years. This neutral online information is meant for European politicians and decision makers and to raise their awareness of the imminence of the threat and the urgency to take action.

Next Steps

In the coming months, the main focus of EuDA will be on the Trade Defence Instruments for Construction Services and on the coordination of the joint lobbying with FIEC and EIC.

Issues and Lobbying activities in Australia



Background

In April 2017, the Australian Government replaced its 457 Visa, the most commonly granted working visas for hiring highly skilled workers, with the Temporary Skill Shortage (TSS) Visa. The Skilled Occupations list accompanying the TSS visas has been substantially reduced. And this is of significantly more concern for the dredging operations as a number of skilled roles, such as Ship's Master, Ship's Officer and Ship's Engineer, which were previously permitted, are no longer available.

How does this impact the European dredging companies?

The changes introduced with the TSS have had 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 fully trained, dedicated and very experienced crew and staff onboard. These critical crew members are employed on a full-time basis and

are part and parcel of a sustainable operation system unique to each vessel type and size.

EuDA Strategy

EuDA's general approach was to provide justifications to reinstate the needed skills (critical crew: Ship's Master, Officer and Engineer) in order to continue with 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.

Overview of 2021 Activities

Since the COVID lock-down in 2020, Australia has quasi-isolated itself from the rest of the world by applying very strict anti-COVID measures. As a consequence, travelling to and fro Australia was very restricted and travelling inside Australia was also very restricted.

The dredgers working locally had to keep their expats on the projects as long as tenable, as those leaving could not be replaced (by new incoming expats).

Finally, the lobbying activities by TF AUS were limited to remote contacts with Australian officials who

confirmed that managing COVID was the top priority of their government and that no decision had been taken yet regarding the broadening of the list of skills for the TSS visas. In conclusion, since 2020, literally no meaningful nor effective lobbying actions could be organised and, as a consequence, no progress could be obtained.

Next Steps

Once the COVID situation is sorted and confinement measures are lifted, a bulk of lobby work will need to be restarted towards the local government and authorities, as well as towards the unions. The TF AUS will continue to raise awareness and seek support from stakeholders including Australian port authorities.



Vincent Detemmerman

THANK YOU, Vincent!

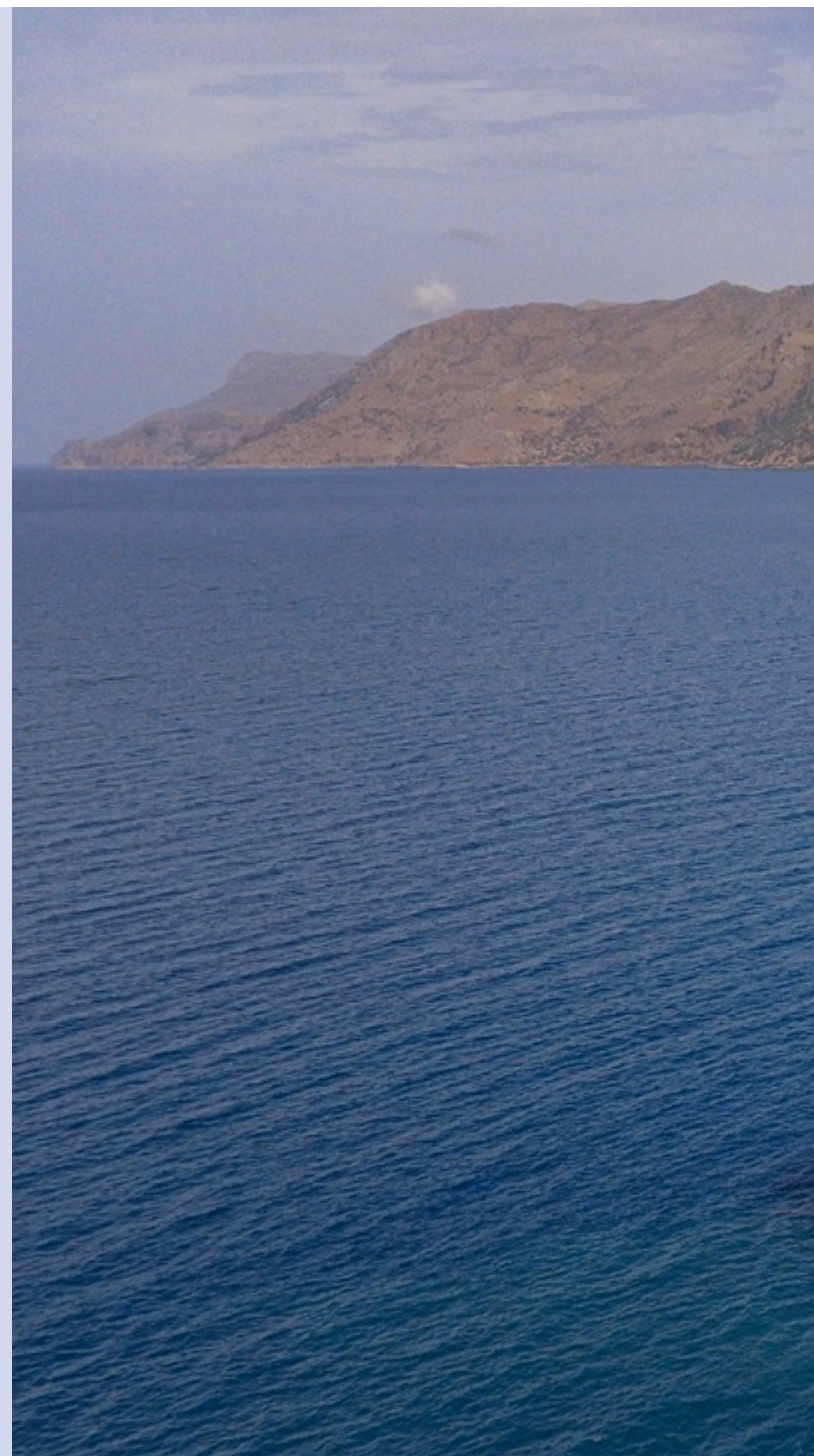
On behalf of the EuDA Market Access Committee, I would like to thank you, Vincent Detemmerman, for your excellent work and your cooperation with the dredging industry over the past years !

In the context of closer cooperation between the European dredging and construction associations, Vincent joined the work of the Market Access Committee of EuDA and was representing the Belgian construction federation. We particularly appreciated his knowledgeability of European procurement laws, his strategic contributions and his enthusiasm during the meetings. He was involved in identifying unfair trade practices by non-EU State-owned Enterprises (SoEs) and with his help and support, EuDA managed to build intelligence and political traction to take action on some of the cases inside and outside Europe.

Thank you, Vincent, for your dedication and support to our industry,

Farewell and success with your new endeavours!

Pierre Potvliege, MarCom Chairman





Industrial and economic developments are progressively reaching the limits of our planet's capacity to absorb the negative externalities produced by these activities (e.g. increase of pollution and waste or depletion of energy and biodiversity resources). The EU Green Taxonomy is defining the significant contributions to the environment required from all economic activities to restore the balance between the three sustainability pillars (economy, ecology and society). The Green Deal aims at channelling more and more EU financial flows towards green, greener and greening economic activities that will help the environment catch-up on economy and society.

Environmental Sustainability, our common Target.

NURTURING & IMPLEMENTING SUSTAINABLE SOLUTIONS

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ENVIRONMENTAL

In 2021, EuDA focused its work on:

- *the Green Deal*
- *the Green Taxonomy*
- *the 'Fit for 55' initiatives*

The EuDA CO₂ Strategy is covered in chapter 4 of this document.

European Green Deal

Background

Adopted in December 2019, the European Green Deal is the EU Plan to improve Europe's environmental footprint, to fuel its economic growth and to improve its social and working conditions. The Green Deal is the EU's top priority and its main objectives include: no net emissions of greenhouse gases by 2050 (Paris Agreement commitments), decoupling of economic growth from resource use, and a just and inclusive for all transition (no person and no place is left behind).

Among the many initiatives taken by the Commission under the Green Deal, there are two initiatives that will potentially have a significant impact on the European industry and economy: **Sustainable Finance** and the **Green Taxonomy**.

Sustainable Finance

The European Green Deal needs to be financed. Indeed, the transition to a sustainable economy will entail significant investment efforts across all sectors of the economy that both public and private financing frameworks must support to reach the 2030 climate and energy targets. Moreover, financial sustainability is also part of the challenge and particularly the increase of the financial resilience of the economy, companies and citizens. Sustainable investment will need an enabling framework, with appropriate tools and structures, such as those being prepared under the **Green Taxonomy** which will incentivise the "*financing of green activities*" and the "*greening of finance*".

Green Taxonomy

The **Green Taxonomy**¹, published in June 2020, was designed to incentivise and to promote more sustainable practices through sustainable financing in order to achieve the environmental objectives of the Green Deal. To this end, it establishes criteria for determining whether an economic activity qualifies as environmentally sustainable and to establish to what degree an investment is environmentally sustainable. This regulation covered essentially climate change objectives (mitigation and adaptation) and was based on the work concluded by the Technical Expert Group (TEG) in 2020. It is the first of a series of legislative texts that will encompass all economic activities. They will also cover 4 additional environmental objectives (combatting pollution, promoting circular economy, preserving and restoring biodiversity and improving water quality).

¹ Regulation 2020/852 on the "establishment of a framework to facilitate sustainable investment".

2021
Members
of the EuDA
Environment
Committee

Pieter van der Klis
(EnvCom Chairman,
Van Oord)



Paul Vercrujssse
(DEME)



Karel Allaert
(Jan De Nul)



Arjan Schrijen
(Boskalis)



Mark Russell
(BMAPA)



Chantal Schillemans
(Vereniging van
Waterbouwers)



Paris Sansoglou
(EuDA)



In October 2020, a new Platform for Sustainable Finance (PSF) was established with selected experts from the industry, the society and the institutions to provide technical advice to the European Commission in a science-based and objective manner. EuDA successfully applied to participate in this Platform and Mrs Lara Muller was chosen by the Commission and allowed one 'sherpa' for support and assistance: Mr Paris Sansoglou.

In order to provide support to the EuDA representatives in the Platform on Sustainable Finance (PSF), the Task Force on Green Taxonomy (TF GT) was established in December 2020 by the EuDA Board as a temporary task force. The TF GT aims to provide information, data and expert advice on possible screening criteria to determine whether an economic activity qualifies as environmentally sustainable.

“Climate change and environmental degradation are global existential threats that need to be turned into opportunities for Europe”

2021 Members of the Task Force on Green Taxonomy



Lara Muller
(Boskalis)
Chairman



Jiska Verhulst
(DEME)



Bastiaan Kooistra
(Van Oord)



Ignace Stols
(Jan De Nul)



Fokko van der Goot
(Boskalis)



Paris Sansoglou
(EuDA)

What is the Green Taxonomy?

The Green Taxonomy is a **Dictionary** and an Inventory for the Future that aims at providing:

- clarity on what is material for an environmentally sustainable activity to achieve a sustainable future;
- the market and the public with the necessary confidence on environmental performance.

The Green Taxonomy is a **Harmonisation Tool** that leverages existing work and aims at being easy to use across the EU.

The Green Taxonomy is a **Reporting Enabler**, that will enable to measure the degree of current and future environmental fitness of an investment product and the share of environmentally fit activities in a company.

The Green Taxonomy is also a **Transition Tool**, covering Turnover, CAPEX and OPEX, that will help investors and companies to plan and report on their transition. It sets the objectives and the direction of travel for different economic activities.

Finally, the Green Taxonomy is **Dynamic and Evidence/Science-Based**:

- the criteria and thresholds will evolve over time;
- the rationales for any choice (prioritisation of activities, setting of criteria...) are clearly spelled-out;

- the conceptual framework and methodology are robust.

How does the Green Taxonomy work ?

According to the Green Taxonomy, an economic activity qualifies as environmentally sustainable if it :

(a) contributes substantially (**SC**) to one or more of the following environmental objectives (listed in Art. 9):

- climate change **mitigation**;
- climate change **adaptation**;
- sustainable use and protection of **water and marine resources**;
- transition to a **circular economy**;
- **pollution** prevention and control;
- protection and restoration of **biodiversity and ecosystems**.

(b) **does not significant harm (DNSH) to any of these environmental objectives**;

(c) carried out in compliance with **minimum safeguards**:

OECD Guidelines for Multinational Enterprises and the UN Guiding Principles on Business and Human Rights, including the principles and rights set out in the eight fundamental conventions identified in the Declaration of the International Labour Organization on Fundamental Principles and Rights at Work and the International Bill of Human Rights.

(d) complies with **technical screening criteria**.

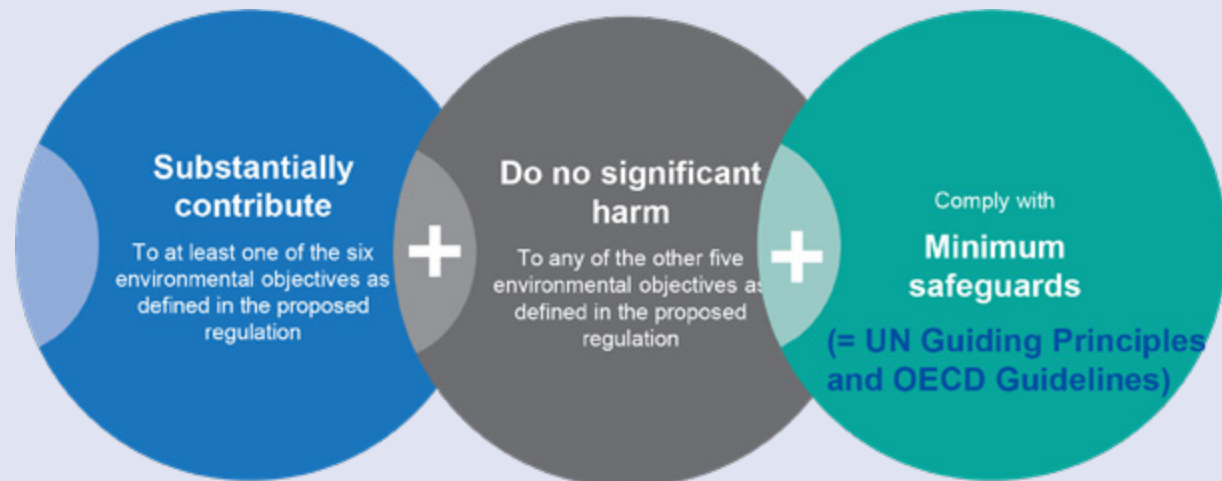
To qualify as environmentally sustainable under the Green Taxonomy, economic activities need to be:

■ **eligible**: technical screening criteria for **SC** and

DNSH have been established for their activity

(considering turnover, OPEX and CAPEX);

■ **aligned**: the performance of the (taxonomy) eligible activity is meeting the criteria for **SC** and **DNSH**.



Platform for Sustainable Finance

The Platform for Sustainable Finance (PSF) was established in October 2020 by the European Commission to provide it with science-based, evidence-based expert advice on how to implement the Green Taxonomy to most of its economic activities impacting the environment. The PSF is composed of 57 members (with one voting right each) of which 24 represent the private stakeholders from financial, non-financial and business sector. The other 33 members include representatives of financial institutions, academia, civil society and specific experts (selected in their personal capacity). The platform also counts 10 observers (with no voting right).

The Platform is structured in sub-groups created to fulfil its tasks and mandate on:

- 1° Sub-Group 1: the Technical Working Group, which is the biggest group of experts, will determine the technical screening criteria (of whether an economic activity is sustainable or not);
- 2° Sub-Group 3: extension to significantly harmful and low impact activities;
- 3° Sub-Group 4: extension to social objectives;
- 4° Sub-Group 5: data availability and usability of criteria.

NB: Sub-Group 2 (advise on Regulation review) and Sub-Group 6 (monitoring capital flows to sustainable investments) have been postponed.

EuDA was allocated to Sub-Group 1 TWG. The TWG was split into Sector Teams (grouping economic activities under the same 4 digits NACE code):

ST1	Agriculture, Forestry and Fishing;
ST2	Mining and Processing Sectors;
ST3	Manufacturing 1 (chemicals, rubber and plastics, pharmaceutical products and preparations);
ST4	Manufacturing 2 (metals, electronics, machinery);
ST5	Manufacturing 3 (textiles, wood products, food products and beverages);
ST6	Energy;
ST7	Construction and buildings, ICT, Emergency Services;
ST8	Transport;
ST9	Restoration and Remediation, Tourism;
ST10	Water Supply, Sewerage, and Waste Management.

As full member of Sector Team 7 on Construction, EuDA worked on the technical screening criteria for civil engineering, buildings and disaster risk management (published in the TWG Report published for consultation in July 2021).



EU Consultation on Climate Change Mitigation and Adaptation

With the feedback from its stakeholders' consultation of November 2020, the Commission finalised its Delegated Act on "sustainable activities for climate change adaptation and mitigation objectives" (DA CCM and DA CCA) which was formally adopted on 4 June 2021 by the EU co-legislators. A second delegated act on the remaining 4 environmental objectives of the Green Taxonomy should be published in 2023.

EuDA identified a potential issue in the adopted DA CCA: under section 6.16 "Infrastructure for water transport" of the Annex II, dredging of waterways are excluded from the scope of the substantial contribution to Climate Change Adaptation ("The economic activities in this category exclude dredging of waterways") (see also 4.2.1 hereafter). Without any further explanation nor justification, this exclusion might appear discriminatory (as there are no technical screening criteria to determine the economic activity's SC or DNSH).

The Commission considered that dredging is a key enabler for waterborne infrastructures to adapt to climate change. Therefore, EuDA is planning to develop in 2022 technical screening criteria for dredging as an enabler of CCA.

Alignment of Public Procurement rules and the Green Taxonomy Regulation

From an early stage, based on its work and understanding, EuDA was of the opinion that the requirements under the Green Taxonomy and under the Sustainable Public Procurement should be aligned to facilitate and incentivise a dynamic process of transition towards the 2030 and 2050 targets.

'Fit for 55'

Among the other Green Deal initiatives taken by the Commission, there is the 'Fit for 55' legislative package, aiming to make the EU's climate, energy, land use, transport and taxation policies fit for reducing net greenhouse gas emissions by **at least 55% by 2030**, compared to 1990 levels.

The **Fit for 55 package** is a major policy and legislative package which consists of a set of complementary and inter-connected proposals, which aim at ensuring a fair, competitive and green transition by 2030 and beyond, by applying the 'Polluter-Pays' principle. Where possible existing legislation is made more ambitious and where needed new proposals are put on the table. Overall, the package strengthens **8 existing pieces of legislation** and presents **5 new initiatives**, across a range of policy areas and economic sectors: climate,

energy and fuels, transport, buildings, land use and forestry.

Among the Fit for 55 initiatives, EuDA is following up closely and working on:

2° Extending **Emissions Trading to maritime**

The inclusion of dredging under the ETS shipping may not be immediate as the scope of ETS applied to shipping should use the same coverage of ships as under the Monitoring, Reporting and Verification (MRV) Regulation, where dredging and the other working vessels were excluded in a first phase.

EuDA plans to organise an ETS workshop at the beginning of 2022 to clarify the areas of uncertainty relating to dredging and ETS.

3° Updated **Energy taxation Directive** (the systematic taxation may improve level playing field, where it used to be voluntary among Member States);

12° FuelEU (Cleaner maritime fuels) promotes sustainable maritime fuels and creates new requirements for ships, regardless of their flag, arriving to or departing from EU ports, by imposing a maximum limit on the greenhouse gas content of the energy they use and making these limits more stringent over time.

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.

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 blockage. EuDA encourages joint working groups and approaches on (joint) policy implementation like the ones DG MOVE and DG ENV organised on the implementation of the Habitats Directive in Coastal, Estuary and River environments (*"The implementation of the Birds and Habitats Directives in estuaries and coastal zones, with particular attention to port development and dredging"* and *"Inland waterway transport and Natura 2000: Sustainable inland waterway development and management in the context of the EU Birds and Habitats Directives"*). In these guidelines, for instance, (maintenance) dredging is referred to as a measure that could be designed in such a way as to achieve or respect both environmental and navigational objectives.

Moreover, EuDA is of the opinion that net biodiversity gains should be encouraged in projects, not discouraged, including in the case of compensations.

The 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 is some sort of divide between some Northern and some Southern EU countries.

The concept of 'Circular economy' was progressively elaborated by the European Commission to stimulate the re-use/re-cycling of waste with the general motto that *"waste is a resource to be put to beneficial use"*.

Water & Marine Strategy Framework Directives

The Water and Marine Strategy Framework Directives are the cornerstones of Europe's water policy. They are built around the following concepts:

- River basin management (cross-border);
- Good Ecological Status (water quality);
- Good Environmental Status (including human activities).

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 used the so called "combined approach" of emission limit values and quality standards. 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. Although significant progress was made among the Member States, more time is needed to achieve complete GES.

The Marine Strategy Framework Directive (MSFD) aims at "filling the gaps" left by the Water Framework Directive: for instance, the geographical scale is not

restricted anymore to the coastal waters. Moreover, MSFD broadens the scope of water quality assessment by enlarging the “Good Ecological Status” (mainly chemical assessment of the water quality) to the “Good Environmental Status” (GES), introducing the human activities impacts on water quality and ecosystems.

Compared to the Water Framework Directive, the Marine Framework Directive introduced

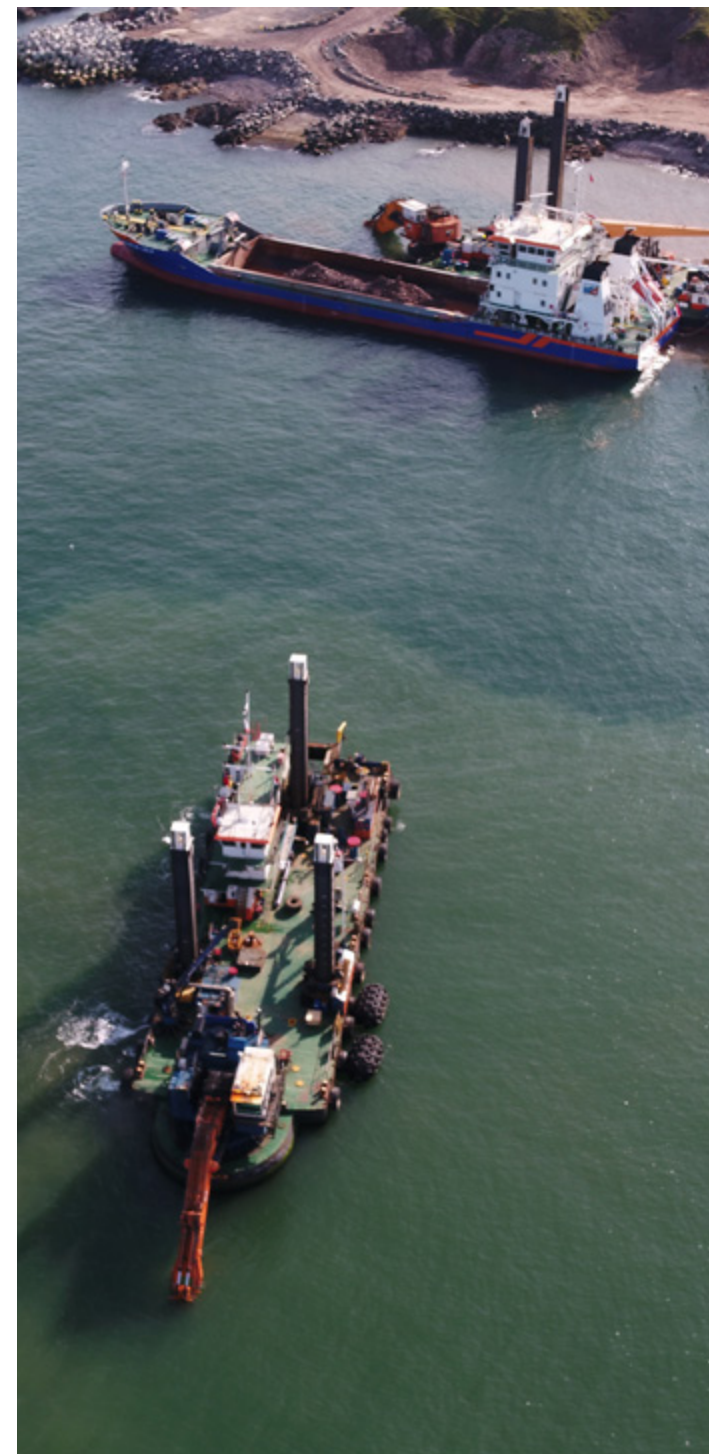
- the selection and implementation of the Measures (Descriptors), their Monitoring and adaptive Management;
- the integration and further development of the Shipping activities;
- a clarification of the handling of contaminated/ uncontaminated sediments.

Under the Integrated Maritime Policy, the Maritime Spatial Planning and Integrated Coastal Management present the main policy elements of Europe’s coastal management. With 80% of the largest population centres located in coastal areas, this new policy is a response to the increased demand for use of the coasts and the seas.

The main issues for dredging remain the need to access ‘winning areas’ and/or ‘relocation areas’ (sand,

rock, gravel, silt ...). Besides, Member States need a common framework but also flexibility (in space, time and policy) for implementation.

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



CLIMATE CHANGE AND COASTAL PROTECTION POLICY

Climate Change is accompanied with an increasing number of threats to natural habitats, human beings and economic assets, such as sea level rise and increased frequency of extreme events. Dredgers have the technology and know-how to design and build sustainable and resilient solutions to reduce the impacts of or eliminate the risks posed by these Climate Change related global threats

Climate Resilience, our common Aim.



BUILDING SUSTAINABLE DEFENCES AGAINST SEA LEVEL RISE



CLIMATE CHANGE AND COASTAL PROTECTION

From its inception in 2009, the EuDA **Emissions Working Group** (EmWG) worked towards establishing and implementing the EuDA common **CO₂ Strategy**. The main objectives of the CO₂ Strategy have been to improve internal and external understanding of the CO₂ emissions from the EuDA dredging fleet. Besides CO₂ emissions, the scope of this working group also covers the other emissions from dredging vessels since 2017.

With the consistent promotion of its CO₂ Strategy, through position papers, consultations, presentations, specialised articles, meetings, EuDA managed to raise the awareness of officials and representatives from the European Commission, the European Council (through the Member States) as well as from IMO on the views and main recommendations of the European Dredgers with regards to CO₂ matters.

In 2021, EuDA continued the implementation of its

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

CO₂ Strategy and focused on the ‘Fit for 55’ legislative package, including Emission Trading System extension to shipping and FuelEU to maritime, the European Sustainable Shipping Forum (ESSF), on the IMO Data Collection System and the EU’s Directive on Monitoring, Reporting and Verification (MRV).

EuDA CO₂ Strategy

The main objective of the CO₂ Strategy has been to build a better understanding over the CO₂ emissions from the EuDA dredging fleet. In 2009, the group established a procedure and methodology for the collection of raw data for the calculation of CO₂ emissions. The Strategy

also involved raising awareness in the International Maritime Organization (IMO).

The implementation of the EuDA CO₂ Strategy involved information gathering, internal knowledge building and specific message formulation to effectively communicate our issues to the relevant parties. Besides the contacts within the Member States, EuDA has kept regular contact with the Commission’s DG CLIMA informing the Officials and making them aware of the specific situation of the dredgers.

Industry-backed calculation method for CO₂: data update and review

In a joint Statement to IMO in 2010, EuDA and IADC highlighted that the Energy Efficiency Design Index (EEDI), as it stood, could not be implemented to the dredging vessels and proposed an alternative industry

Paul Vercrujsse
(EmWG Chairman
DEME)



Arjan Schrijen
(Boskalis)



Job Voormolen
(Van Oord)



Karel Allaert
(Jan De Nul)



Chantal Schillemans
(VvW)



René Kolman
(IADC)



Paris Sansoglou
(EuDA)



2021
Members
of the
EuDA Emissions
Working Group

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specific approach to reach the same goal. The Task Group on Emission Figures (TGEF) was established in the summer 2010 to substantiate and materialise these commitments.

EuDA compiled a set of fact based emission figures for its dredging fleet and established a transparent industry backed calculation method.

This exercise was completed in 2012 and in 2019. The second report confirmed the general evolution and trends and also that performances improved by 15% in 20 years for the 103 TSHD, 63 CSD and 30 BHD in the 2017 dataset (compared to the 2010 dataset). Moreover, the calculation methods remained unchanged.

Communicating policy and technical aspects

In 2019, EuDA organised an internal workshop on “Methodologies and Tools for Dredgers’ CO₂ Emissions”. On the basis of the discussions, the 2017 EuDA Internal Report on CO₂ performance was validated and the following documents were finalised in 2020:

- a **policy paper** (and a **1-pager**), explaining the basis for the calculations and providing policy recommendations;
- **three (internal) Technical Reports** (applying these

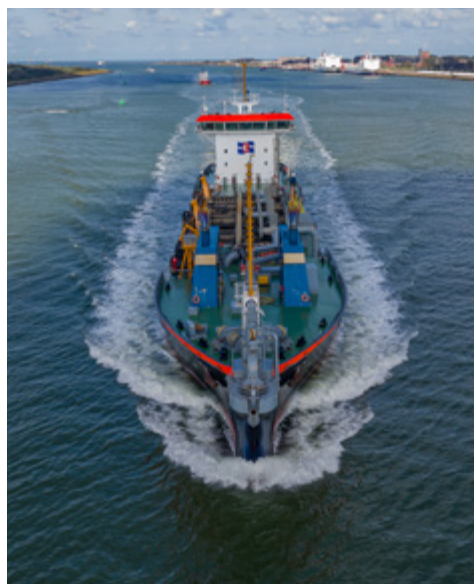
calculations to projects executed with TSHDs, CSDs and/or BHDs), to support the EuDA members’ exchanges with their Flag, national administrations and clients.

EuDA CO₂ emission figures 2020

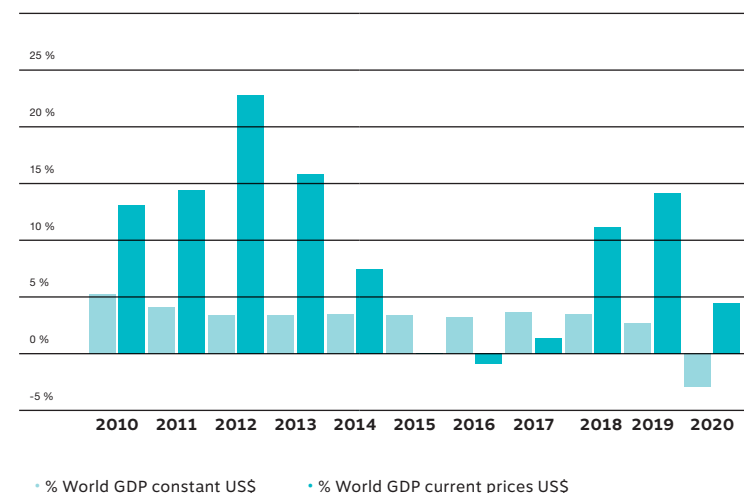
EuDA collected and compiled the 2020 data for the CO₂ emissions of the European dredging fleet.

Since before the 2015 Paris Agreement and its target to achieve the 1.5°C target and before the current context of the EU Green Deal commitments to achieve

Climate Neutrality by 2050, EuDA members had been actively researching ways to reduce their atmospheric emissions and optimise fuel consumption as well as researching alternative options to fossil fuels. They took individual steps, testing pilot initiatives (LNG propulsion, biofuels and “fumes treatment”) to lower not only the CO₂ emissions but also NO_x, CO and fine particles. They also took joint steps through EuDA by organising a strategic workshop on energy transition towards a neutral carbon footprint, finalising its second report on the CO₂ performance of the EuDA fleet and finalising a policy paper and technical reports



Graph 1:
Evolution of World GDP (2010-2020) source: IMF



“In 20 years,
the CO₂ performance
of European dredging vessels
improved on average
by 15%.”





to communicate in a harmonised and clear way the findings and main messages from the report to the outside world.

The growth of the global economy has been slowing down and has not really picked up since the financial and economic crises in 2008. With the world GDP in constant prices remaining below the level of 5.4% in 2010. In 2015, 2016 and 2017, the variations between the ratios of constant and current prices growth rates indicate possible issues with global inflation-deflation. Since 2017, the global economy grew both in current prices and in constant prices until 2020 where the GDP

in constant prices decreased by 3.3% while the GDP in current prices increased by 4.6%. The global economy has yet to confirm a continuous growth trend. In 2018 and 2019, the growth in current prices (respectively 14.5% and 15.2%) was also significantly higher than the one in constant prices (3.5% and 2.8%): this shows signs of overheating and speculation that could be linked to the international trade issues such as the trade war between US and China, which significantly impact global trade and world GDP.

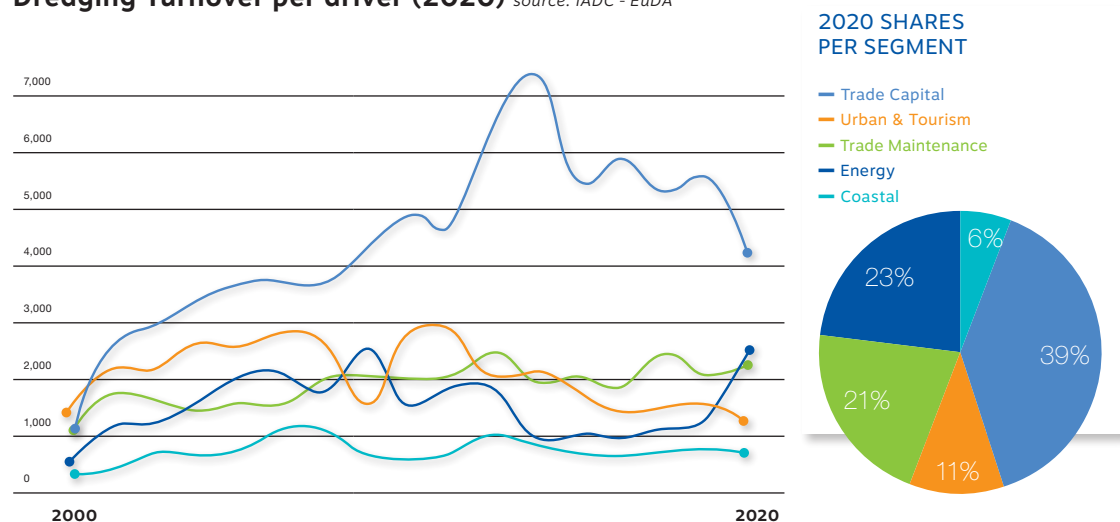
Main dredging drivers

The main drivers for the European dredging companies are various and not correlated. These uncorrelated drivers provide the dredging sector with a reasonably steady growth and a level of acyclicity (resilience to economic cycles). 2020 shows a continued decline of the capital dredging projects and a re-activation of offshore energy related projects.

Evolution of the EuDA fleet CO₂ emissions

The general trend in Graph 3 below confirms that the worldwide CO₂ emissions of the European Dredgers are steadily decreasing for the last 10 years.

Graph 2:
Dredging Turnover per driver (2020) *source: IADC - EuDA*



Graph 3:
EuDA fleet CO₂ emissions (2010-2020) *source: EuDA*

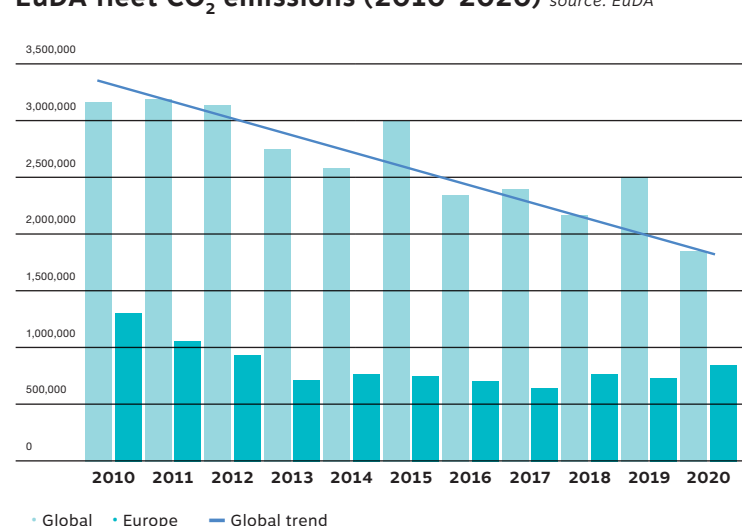


Table 1: EuDA fleet CO₂ emissions (2010-2020) source: EuDA

EuDA Sea-going dredging equipment			
Global operations	Installed power MW	Fuel consumption kton	CO ₂ emissions kton
2010	1,591	999	3,155
2011	1,779	1,003	3,163
2012	1,845	986	3,108
2013	1,666	881	2,775
2014	1,599	847	2,673
2015	1,298	959	3,033
2016	1,264	751	2,371
2017	1,516	777	2,449
2018	1,421	675	2,134
2019	1,564	768	2,430
2020	1,451	583	1,860

European operations	Installed power MW	Fuel consumption kton	CO ₂ emissions kton
2010	654	420	1,326
2011	637	357	1,126
2012	502	284	896
2013	527	220	696
2014	531	229	724
2015	409	223	713
2016	306	207	663
2017	369	195	624
2018	485	238	763
2019	500	214	682
2020	605	258	826



In absolute numbers, the world seagoing dredging fleet was estimated to have produced 6.3 Mton of CO₂ in 2008. The emissions of the European Dredgers (EuDA members) in 2008 were about 3.4 Mton. From then on, the European dredgers' CO₂ emissions continuously dropped towards 2.0 Mton. During the past 10 years, there have been isolated peaks, like in 2015, when the emissions soared to 3.0 Mton: this was mainly explained by the surge of activity linked to the expansion of the Panama and Suez Canals. Another peak occurred in 2019 with 2.5 Mton. In 2020, the emissions decreased to 1.9 Mton, below the 2 Mton mark for the first time. The decrease since 2008 was 45.9% in relative terms. The 2020 activity levels also reflected the significant impact of the COVID pandemic (and its supply chain and economic disruptions).

The reduction in the CO₂ emissions can be partly attributed to the medium-term effects of the 2008 economic crisis, that reduced the occupation rates. However, with the surge of activity due to Suez and Panama, the global emissions of the European Dredging fleet in 2015 raised to the level of 2012. Inside Europe, a similar peak occurred in 2010 corresponding to the peak of activity for the reclamation of Maasvlakte 2 in the Netherlands. For the past 7 years, the level of CO₂

emissions in Europe are steady between 600-800 ktons of CO₂, well below 2008. EuDA's global emissions in 2020 confirmed the general downward trend of the European Dredgers' emissions and amounted to 1.9 Mt and are the lowest on record so far. However, the COVID pandemic significantly impacted the 2020 activity levels.

These figures also confirm the steady progress on reduction of CO₂ emissions per m³ (relative CO₂ emissions) achieved by the European Dredging industry. However, absolute CO₂ emissions achievements cannot be disconnected from global activity in general and sector activity in particular. The achievement of absolute CO₂ emissions targets demands a Sector Strategy that would combine relative efforts on emission (CO₂ emissions per m³) with actions on atmospheric CO₂ concentrations through offsetting measures such as the restoration of blue carbon habitats. In the current context of the Green Deal and its initiatives, such as the 'Fit for 55' package and the Green Taxonomy, increased pressure is coming from the EU Member States to help achieve the goal of reducing the CO₂ emissions by 55% by 2030 (compared to 1990 levels). EuDA will cooperate with the legislators and administrations to effectively reach the goals and objectives with pragmatic and

realistic transition paths for the dredgers.

Next Steps

EuDA will further develop and implement its CO₂ strategy and work on :

- 1° using the **calculation of CO2 emissions** to provide knowledge and guidance for the transition towards CO₂-neutrality;
- 2° pursuing a closer **communication and cooperation with academia**, including non-engineers and multi-disciplinary contacts, to defining further research questions and possibly establish a multi-disciplinary centre of excellence;
- 3° cooperating with DG MOVE and DG CLIMA on regulations and policies such as the Fit for 55, the EU ETS, FuelEU, the EU MRV;
- 4° cooperating with DG FISMA and DG CLIMA on the interpretation/implementation of the EU Green Taxonomy Delegated Act on Climate Change Mitigation & Adaptation.

European Sustainable Shipping Forum (ESSF)

The European Sustainable Shipping Forum (ESSF)

is a forum established by the Commission for structural dialogue, exchange of technical knowledge, cooperation and coordination between the Commission, Member States' authorities and maritime transport stakeholders on issues pertaining to the sustainability and the competitiveness of EU maritime transport. It was first established in 2013 for a period of 5 years and its mandate was renewed in 2018 for another 5 years.

In 2013, EuDA was observer in the ESSF. In 2018, EuDA became full member of the ESSF. Paris Sansoglou represents EuDA at the plenary sessions and Hendrik Vanneste (Jan De Nul) at 2 technical subgroups ('Sustainable Alternative Power for Shipping' and 'Ship Energy Efficiency').

ESSF is also the technical platform where the EU and the Member States discuss and coordinate their respective (ideally common) positions with regard to IMO proposals, EU legislation (existing and upcoming) and other issues related to making European shipping (more) sustainable. In their positions, the European Flag authorities use the findings and content developed in the ESSF sessions.

EuDA comments on the EU Submission to IMO

EuDA took the opportunity of a joint EU Member States submission to IMO to highlight the following messages:

- *The dredging sector is ready to contribute to CO₂ emissions reductions and is helping to establish appropriate definitions, methods and proxies to this end.*
- *Because working vessels like dredgers and offshore supply vessels use energy for working and for sailing, the **Energy Efficiency Design Index (EEDI)** for newbuild vessels as it currently stands, cannot be meaningfully applied to working vessels. the same reasoning goes for the **Energy Efficiency Index for eXisting vessels (EEXI)** and Carbon Intensity Indicator (CII).*
- *Moreover, the use of energy can significantly differ from project to project as no two dredging projects are identical and, consequently, the operational profiles of dredging equipment, using energy to both sail (transport/removal of soil) and work (excavation) can also significantly differ from project to project.*
- *Clearer and more specific definitions of ship types (including working vessels) are needed and further research should be done and information collected for an alternative proxy/ies (meaningfully applicable to working vessels).*
- *More (meaningful) data needs to be collected in order to improve policy-making with regard to GHG reduction, especially when working vessels are concerned.*
- *Finally, transparency is essential, however EuDA considers more appropriate the publication of aggregated or more granular data within synthetic and analytical reports rather than providing access to raw data without a proper contextualisation and explanation (which may lead to serious misunderstandings and misinterpretations, especially when comparing performances of cargo ships with working vessels).*

CEDA held its CEDA Dredging Days® 2021 virtually.

The main theme was

“Sustainable Dredging and Innovation.

The science. The practice. The business.”.





The EU Green Deal considers that minimum ethical and social standards are needed to safeguard the Social Pillar of Sustainability. These minimum safeguards include the OECD Guidelines for Multinational Enterprises and the UN Guiding Principles on Business and Human Rights, including the principles and rights in the Declaration of the International Labour Organisation on Fundamental Principles and Rights at Work and the International Bill of Human Rights.

It is essential that all EU-financed or EU-funded projects (inside or outside the EU) require and comply to these minimum safeguards.

Social Sustainability, our common Safeguard.

INVESTING
IN THE
KNOWLEDGE
AND SKILLS
FOR OUR
SUSTAINABLE
FUTURE



SOCIAL POLICY

SocCom Vision and Communication Plan

Strategic Workshop

EuDA organised in 2018 an internal strategic workshop on “Reevaluating and Redefining the EuDA Strategy on State Aid to Maritime Transport” to identify and discuss obstacles for the European Dredging Industry, the potential solutions and priorities as well as realistic future options.

With the collected input, EuDA established its long-term social vision and associated communication plan. EuDA Social Vision and Communication Plan are living documents that drew the main strategic lines for EuDA to follow in its upcoming lobbying activities.

The EuDA Social Vision grouped the identified issues into 5 main clusters:

- 1° Unfair Competition;
- 2° Not Future Oriented Governance;
- 3° Unsited and Messy Legal Framework;
- 4° Labour Availability, Qualifications, Mobility;
- 5° Enforcement and Compliance Checking.

These clusters cover the entirety of the European Dredgers’ issues, not just the social ones. It is evident that the chapter on State Aid to Dredging will continue to have a central place in the EuDA Social Vision. But it is framed in a broader strategic long-term vision.

Among the 5 clusters, 2 priorities were clearly part of the scope of the Social Committee (3° *Unsited and Messy Legal Framework* and 4° *Labour Availability, Qualifications, Mobility*). However, with the emergence of the **EU Green Deal**, covering all aspects of sustainability,



2021 Members of the EuDA SocCom

Hans Casier
(SocCom Chairman,
DEME)



Bo Toft Franzen
(Rohde Nielsen)



Katleen De Geyter
(Jan De Nul)



Geert Klaver
(Van Oord)



Robbert Veenstra
(Boskalis)



Paris Sansoglou
(EuDA)



including social welfare and working conditions, and with the increasing **threat of non-EU State-owned Enterprises** entering Europe (without any challenge regarding the working and living conditions of their staff), the social components of the other 3 clusters were also kept as priorities and worked on.

Levelling the playing field in Europe on Social aspects

For the past ten years, European Dredgers have experienced and reported more and more unfair competition practices from Chinese State-owned Enterprises (SoEs): starting in China and its neighbouring countries then in many third market countries around the world and crossing into Europe since 2019. To respond effectively to this threat, EuDA has developed a toolbox approach whereby a set of policy and legislative instruments are identified and combined into a **European Trade Strategic Toolbox** that aims to stop these unfair competition practices by these non-EU SoEs to further harm the European Dredgers (in Europe and around the world).

In this toolbox, EuDA included the possible social and labour related instruments and reflected on ways in which social regulations (permits, visas, language/nationality requirements, ...) could be better enforced

or adapted (if necessary) to prevent non-EU SoEs from using in Europe their unfair trade practices, such as social dumping or forced labour.

In the international legislation, minimum standards are imposed by the ILO Maritime Labour Convention (MLC 2006). In the existing EU legislation, minimum standards are imposed by the Posting of Workers Directives.

Posting of Workers

The Posting of Workers Directives include:

- 1° EU Directive 96/71/EC on *“the posting of workers in the framework of the provision of services”* (16/12/1996);
- 2° EU Directive 2014/67/EU on *“the enforcement of Directive 96/71/EC concerning the posting of workers in the framework of the provision of services”* and amending IMI Regulation EU/1024/2012 on *“administrative cooperation through the Internal Market Information System”* (15/05/2014); and
- 3° Directive (EU) 2018/957 amending Directive 96/71/EC concerning the posting of workers in the framework of the provision of services (28/06/2018).

The provisions in these directives that are of relevance in the tackling of unfair social practices by non-EU

SoEs include

Art. 3 of the posting of workers Directive stipulates that Member States shall ensure equal treatment as well as the following requirements:

- **maximum work periods and minimum rest periods;**
- **minimum paid annual leave;**
- **remuneration, including overtime rates;**
- **health, safety and hygiene at work;**
- **equality of treatment between men and women and other provisions on non-discrimination;**
- [...]

These legislative provisions could be used to create social ‘filters’ by imposing restrictions on movement of selected natural persons (e.g. through restrictions on visas and work permits; requirements on training/education or qualification; requirements on licensing/certification; requirements on minimum level of social security and/or health insurance; ...). The application of these provisions would need to remain consistent and compliant with the international commitments of the EU and its Member States at the WTO.

Despite their existence, these legal provisions also need to be enforced systematically and effectively. Ideally with a ‘compliance rewarding selectivity’: that would increase checks on the regularly non-compliant entities and

reduce checks on the systematically compliant entities. At this stage, the enforcement is more perceived as a bureaucratic burden rather than a selection instrument improving level playing field in EU projects. All EU rules should apply to all companies working in the EU, including non-EU State-owned Enterprises.

ILO Maritime Labour Convention (MLC 2006)

The ILO Maritime Labour Convention (MLC 2006) imposes minimum standards and requirements for crew (nautical, not nautical), such as **Minimum wage; Worker welfare; Working conditions** provided by compulsory collective agreements.

Unfair Competition from China: the Elbe Case

As mentioned above, unfair competition from China has been a growing phenomenon for the past ten years that is now crossing Europe's borders. In 2021, Chinese SoEs took part unchallenged in the tender for the maintenance of the Elbe River in Germany. Their bid had the lowest price by far (31.88% lower than the second-best offer). EuDA considered action and quickly discovered that there were no instruments available in the existing EU legislation to stop unfair trade practices (such as heavy subsidisation or social dumping) from entering the EU and damaging the European dredging industry.

In its analysis, EuDA highlighted that social norms apply to EU and non-EU contractors. However, the main issue is the effective enforcement of these social norms. For instance, the proper enforcement of the posting of workers directives (EU 2018/957; 2014/67/EU; 96/71/EC) could provide additional safeguards.

EuDA's analysis concluded that to improve level playing field, enforcement was needed for compliance with:

- 1° **international standards** on labour rights, human rights, child labour, forced work, fraud, etc;
- 2° local minimum or if applicable **Collective Labour Agreements** (CLA) standards (we have to comply, so 3rd country companies should comply as well);
- 3° **local rules & regulations** and with **MLC requirements** (and flag & crew).

COVID 19 related issues (health, crew changes, certificates, ...)

The COVID-19 pandemic is a public health emergency. The necessary national prevention and protection measures put in place to stop the spreading of the virus have proved effective but they also severely impacted many economic activities in all the EU Member States.

As each State around the world (including in the EU) is taking its own set of measures, the issues faced by the shipping companies are mainly **country specific**. Among the main issues caused by the pandemic, the most problematic for the dredgers was from the very beginning the **difficulties to change crews**: new crews have difficulties to or cannot access the ships/projects and crews on board have difficulties to or cannot leave the ship/project to get back home. In addition, visas, work permits and other certificates tend to expire (are easily prolonged but temporarily). Finally, PPE (personal protection equipment), quarantine and testing may or may not be required.

Dredging industry

The situation for dredging has been gradually improving in Europe with regard to crew changes. EU governments provided support on trade and shipping. In some countries, dredging personnel has been recognised as 'key port's personnel', but not everywhere. Some consultations with the Unions were organised and compromises were found on various quarantine formats. Outside Europe, the situation remains problematic. In some cases, bureaucratic procedures for crew changes authorisations in projects outside the EU could take more than 3 weeks.

Overall there is still a lot of significant improvements needed regarding the crew changes in Europe and around the world, which has led to a surge of cases of depression among staff and an increase in resignations.

Finally, at the request of its members, EuDA addressed a letter to the Commission asking it to consider infrastructures (transport and energy) as strategic and priority assets by Europe (to protect them from hostile acquisitions), also asking for the administrative procedures to be accelerated. Infrastructure projects give a big stimulus for the development of local economy.

EU State Aid: follow-up on DG Competition

Recognising the strategic importance of maritime transport for the European economy in general and for the European maritime cluster in particular, the Commission introduced in 1997 the Community Guidelines on State Aid to Maritime Transport (hereinafter the “**Maritime Guidelines**”). These guidelines provide an EU-wide framework for Member States to apply on a voluntary basis **positive measures** (*not operational aid*) to counteract competition distortions and imbalances in the global maritime markets. These measures are still deemed positive today because they aim at improving the global

level playing field, at fulfilling objectives of common European interest (such as 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 also include maritime dredging, were faced in the 1990s and still are today with significant challenges, such as fierce global competition in the market of the sea-going vessels, which run the significant risk of flagging out of the EU and ultimately 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. The 2004 guidelines imposed stricter conditions for the dredgers which excluded the seagoing self-propelled cutters from the scope of

the revised guidelines and introduced 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.

The Commission confirmed in 2013 that there was no reason to remove any currently accepted benefits and extended, unchanged, the 2004 Maritime Guidelines for an undetermined period of time (without any foreseen revision date). There were however many needs for clarification in order to align the guidelines with the Commission’s decisions since 2004 on the application of these guidelines by Member States.

With regards to the next steps, a revision of the State Aid to Maritime Guidelines is needed and was announced for 2023.

Review of the EuDA Vision on State Aid

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



Building on the good work of the past and making the best use of the lessons learned, EuDA revisited its vision on State Aid with a more in-depth approach to improve the case of the Dredgers and keep the momentum of its constructive exchanges with the Commission.

DG COMP confirmed that the State Aid attributed to Maritime Dredging is considered as a positive measure as the objectives of the instrument 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).

In this approach, the EuDA list of priorities include:

- maintaining the **guidelines** for dredgers (State aid is still necessary to reduce the costs of European seafarers who are, despite the aid, still much more expensive than many of their competitors);
- removing the **'50% Rule'** for dredgers (the burden of the proof associated with this rule causes unnecessary extra costs);
- keeping **tonnage tax** for offshore services vessels.

The next steps include the updating of EuDA's position paper on the Maritime Guidelines intended for DG COMP.

EuDA's main recommendations on State Aid

In preparation for the possible revision of the State Aid Guidelines to Maritime Transport, EuDA has been collecting evidence to substantiate its recommendations for a meaningful revision of the Guidelines:

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 to the other vessels facing fierce global competition in the market sea-going vessels, running the risk of flagging out of the EU and relocating outside the EU.”

While keeping dredging in their scope, the Guidelines should exempt dredgers from the '50% Rule' and enlarge their scope to cover self-propelled ocean-going cutter suction dredging vessels.

“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



THANK YOU, Geert!

Geert Klaver joined our EuDA Social Committee in 2015 as the representative of Van Oord.

On behalf of the EuDA Social Committee, we would like to take this opportunity to thank you, Geert, for your dedication and commitment for 7 years to the EuDA Social Committee and the social legislative issues impacting on the European dredgers.



Bruno Monteyne

We wish you all the best in your new endeavours and welcome your successor Mr Bart Wellens.

*Thank you, Geert
Farewell!*

Paris Sansoglou,
EuDA Secretary General

THANK YOU, Kenneth!

Kenneth Callens only joined the EuDA Social Committee in 2020 as its Chairman and the representative of DEME.

However short, Kenneth's chairmanship refocused the Committee on its main issues of concern.

On behalf of the EuDA Board, we would like to take this opportunity to thank you, Kenneth, for your commitment and contribution to the EuDA Social Committee.

We wish you all the best in your new endeavours and welcome your successor Mr Hans Casier.

*Thank you, Kenneth
Farewell!*

Alan Lievens,
EuDA Chairman



Kennet Callens



The effective transition of economic activities towards sustainability requires significant efforts and investments in equipment, processes and technology. But it also requires significant efforts and investments in new knowledge and skills as well as in a change of mindset and governance.

Sustainability, our common Research & Innovation Objective.



GREEN LIGHT FOR

INNOVATIVE

SUSTAINABLE

SOLUTIONS



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 thanks to their drive to innovate faster than their competitors can imitate them. To provide added value to global logistics, global environment and global society, the European dredging companies are continuously investing in Research, Development and Innovation (RDI) for new vessels and equipment and for improved or new processes and operations. World leadership in global markets is not a destination but a journey of continuous self-improvement towards a constantly moving target.

In order to keep the innovation flow running, EuDA promotes innovation-friendly legislation and governance. Indeed, when innovative solutions appear, they can be hindered or blocked by too prescriptive legislation or unadapted governance. This is why EuDA promotes goal-based legislations and performance-based standards over prescriptive ones, and this is particularly true in globally competitive sectors.

EuDA also promotes the Life Cycle Assessment (LCA) of the costs and benefits of the different possible alternative solutions for a project. Typically, only the costs of the

building phase are considered for attributing projects while the possible added-value or cost reductions occurring afterwards (during operations, maintenance, or during decommissioning) are usually not taken into consideration. It is a well-known fact however that *“the cheapest solution at the point of purchase/procurement means a more expensive asset to hold and manage”*. By integrating long-term metrics and impacts in the decision-making, the life cycle approach opens up the range of solutions to more sustainable solutions (from hard solutions to soft solutions) and provides decision-makers with the proper long-term assessment tools to invest in sustainable assets.

The Green Deal is the top priority of the European Commission and has the potential to become a game changer in the coming years, as in improving Europe's environmental footprint it will also offer opportunities to the greener and more innovative companies. Significant investments are needed for this transition including in new technologies, equipment and processes. European Dredgers are continuously investing in new equipment and technology (e.g. over €11.1 bn invested in new equipment from 2008-2017) to improve their environmental impacts, including in RDI to improve the efficiency of their operations and systems. EuDA members are already investing in the Green Deal.

Co-Programmed Partnership on Zero-Emission Waterborne Transport

The European Commission is also encouraging new technologies, new fuels or new solutions to be found for the maritime industries via major research frameworks, co-funding major research programmes such as the Co-Programmed Partnership on Zero-Emission Waterborne Transport (CPP).

WATERBORNE TP is an industry-oriented Technology Platform gathering waterborne (maritime, inland navigation and lakes) stakeholders such as classification societies, shipbuilders, shipowners, ports, maritime equipment manufacturers, infrastructure and service providers, universities or research institutes, as well as representatives from the EU Institutions and the Member States.

A few years back, WATERBORNE TP had to reinvent itself and adapt to the new requirements of the European research funding environment. The restructuring of the platform involved the creation of a permanent secretariat and management structure as well as the creation of a flagship **Co-Programmed Partnership (CPP)** on *“Zero-Emission Waterborne Transport”* within the framework of Horizon Europe.

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



The CPP secured around 530 M€ from Horizon Europe until 2027 for the waterborne transport to develop technologies and innovations to achieve zero-emission waterborne transport by 2030. The CPP plays a central role in providing and mainstreaming technological solutions for shipping to achieve the Green Deal’s “Fit for 55” objectives and achieve the Paris Agreement targets.

**European Maritime Days 2021, in Den Helder:
“Towards a sustainable blue economy and ocean
literacy for all”**

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 20th May every year and aims to raise the visibility of a Maritime Europe.

The 14th edition of the European Maritime Day (EMD) was broadcasted (held virtually) on 20 & 21 May 2021 from Den Helder, The Netherlands. Its flagship theme was “*Towards a sustainable blue economy and ocean literacy for all*”.



In his opening speech, the European Commissioner for Environment, Oceans and Fisheries, Mr Virginijus Sinkevičius stated: “A sustainable blue economy is essential to achieve the Green Deal’s objectives: it promotes ocean conservation whilst generating wealth and jobs through solutions based on the sustainable use of marine resources. **No green without blue**”.

Innovation challenging International Standards

In 2015, China Communications Construction Company Limited (CCCC) obtained the creation of a WG 11 “Dredgers” under the jurisdiction of ISO Ships and Marine Technology Committee ISO/TC8 for the purpose of proposing new standards. Since then WG 11 and other ISO/TC8 WGs have been actively producing standard proposals for dredging equipment and processes, some of which have completed the process and become new ISO standards. These standard proposals are usually pushed through fast-tracking procedures, which tend to elude their opposition’s attention due to the added time pressure on the voting participants.

Most of these dredging standards were introduced under the shipbuilding side of dredgers and not the earthworks (hydraulic fill) side: hence their focus on the product (equipment) rather than its output (purpose of the equipment). However, these standards may well

create issues for dredging operations (e.g. negatively impacting innovative processes).

EuDA’s analysis revealed that in most cases these proposals are clearly **not output standards** and do not address the **quality level of the output**, but rather prescriptive descriptions on how to do the dredging works or mere lists of definitions with often no common structure. Prescriptive legislations or standards are known to be detrimental to innovation. EuDA, instead, promotes goal-based legislations and performance-based standards. Moreover, the general impression is that the initiated dredging standards proposals also aimed at gathering (missing/lacking/new) knowledge, understanding and information about the processes on board the concerned dredgers.

EuDA created in 2015 an ad hoc Task Group on Dredging Standards to ensure that the adopted standards for dredging vessels, equipment and projects are of the highest quality and that unnecessary standards proposals are stopped. However, since 2020, due to COVID confinement measures, most activity regarding the ISO proposed standards was stopped in ISO/TC8 WG 11.



2021
Members of the Task
Group
on Dredging
Standards



Paris Sansoglou
(TG DS Chairman,
EuDA)



Patrick van Eerten
(Boskalis)



THANK YOU, Robby!

Robby De Backer joined the EuDA Task Group on Dredging Standards from its inception in 2015. Together with the other members of the group, we developed an understanding of the ISO standard building processes. We identified unnecessary standards and managed to stop them from affecting dredging activities. With your support, we improved some of the standards.

We appreciated your keen work, availability and cooperation. We wish you all the best in your new endeavours and welcome your successor Mr Gunter Servaes.



Robby De Backer

*Thank you, Robby.
Farewell!*

Paris Sansoglou, TG DS Chairman

THANK YOU, Bart!

Bart Verboomen joined the EuDA Task Group on Dredging Standards from the very beginning in 2015. Together with the other members of the group, we worked to understand ISO processes. We managed to stop unnecessary standards from getting through in dredging. With your support, we reshaped the standards into more appropriate and useful reference documents.



Bart Verboomen

We appreciated your keen work, motivation and cooperation. We wish you all the best in your new endeavours and welcome your successor Mr Jan Gabriel.

*Thank you, Bart.
Farewell!*

Paris Sansoglou, TG DS Chairman



Robby De Backer
(Jan De Nul)

Maarten Sanders
(Van Oord)

Bart Verboomen
(DEME)

Bo Franzen
(Rohde Nielsen)

“No Green Deal without sustainable Blue Economy.”

Under the umbrella of the European Dredging Association (EuDA), the European Dredgers have united their minds and voices for nearly 30 years to jointly promote market openness, global level playing field and sustainability towards the European and International Institutions.

Sustainability, our common Future.



UNITED WE WORK TOWARDS
OUR SUSTAINABLE
FUTURE



MEMBERS



Belgium

Baggerwerken Decloedt & Zoon N.V.
DEME Building Materials N.V. (DBM)
DEME Environmental N.V.
DEME Offshore BE N.V.
Dredging International N.V.
Dredging & Contracting Belgium N.V.
Ecoterres S.A.
Fédération du Dragage Belge A.S.B.L.
Jan De Nul N.V.
Van den Herik N.V. (Brugge)



Bulgaria

Boskalis Offshore Subsea Contracting B.V.



Cyprus

BKW Dredging & Contracting Ltd.
Boskalis Westminster Middle East Ltd.
Boskalis Westminster Marine (Cyprus) Ltd.
Dredging International Services (Cyprus) Ltd.
Van Oord Middle East Ltd.



Denmark

Rohde Nielsen A/S



Estonia

Terramare Eesti OU



Finland

Terramare Oy



France

Atlantique Dragage S.A.R.L.
CBD S.A.S.
Eco Systèmes de Dragage
Granulats de la Manche Orientale GIE (GMO)
Société de Dragage International S.A. (SDI)
Sodranord S.A.R.L.
Sodraco International S.A.S.



Germany

DEME Offshore DE GmbH
HDC Wasserbau GmbH Nord
Hegemann GmbH / Dredging
Heinrich Hirdes GmbH
Jan De Nul Nassbaggerei und Wasserbau GmbH
Nordsee Nassbagger-und Tiefbau GmbH
OAM-DEME Mineralien GmbH
Strabag Wasserbau GmbH
Van den Herik GmbH
Van Oord Wasserbau GmbH
Vereinigung der Nassbaggerunternehmen E.V.



Gibraltar

Van Oord (Gibraltar) Ltd.



Ireland

Irish Dredging Company
Van Oord Ireland Ltd.



Italy

Boskalis Italia Srl
Branch DEME Environmental Italy
Dravo S.A. Italy Branch
Societa Italiana Dragaggi SpA (SIDRA)



Latvia

Dredging International NV Filiale Latvija



Lithuania

UAB Boskalis Baltic



Luxembourg

DEME Offshore LU S.A.
Dredging and Maritime Management S.A.
Dredging International (Luxembourg) S.A.
Société de Dragage Luxembourg S.A.



Netherlands

Aannemingsmaatschappij de Vries & van de Wiel B.V.
Baggerbedrijf De Boer B.V. / Dutch Dredging B.V.
Baggermaatschappij Boskalis B.V.
Boskalis Nederland B.V.
Boskalis International B.V.
Boskalis Offshore B.V.
DEME Building Materials B.V. (DBM)
DEME Offshore NL B.V.
Dredging and Contracting Rotterdam B.V.
Mijnster zand- en grinthandel B.V.
Paans van Oord B.V.
Royal Boskalis Westminster N.V.
Van den Herik Kust- en oeverwerken B.V.
Van der Kamp International Dredging B.V.
Van Oord Dredging and Marine Contractors B.V.
Van Oord Nederland B.V.
Vereniging van Waterbouwers
Wicks B.V.



Norway

DEME Environmental Contractors N.V. (Branch 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. Portugal Branch
Dredging International N.V. (Branch Portugal)



Romania

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



Spain

Boskalis B.V. Sucursal en España
Dravo S.A.
Dredging International España S.A.
Sociedad Española de Dragados S.A.



Sweden

Boskalis Sweden A.B.
Branch DEME Environmental Sweden



UK

Boskalis Westminster Ltd.
British Marine Aggregate Producers Association
(BMAPA)
DEME Building Materials Ltd.

DEME Environmental Contractors UK Ltd.

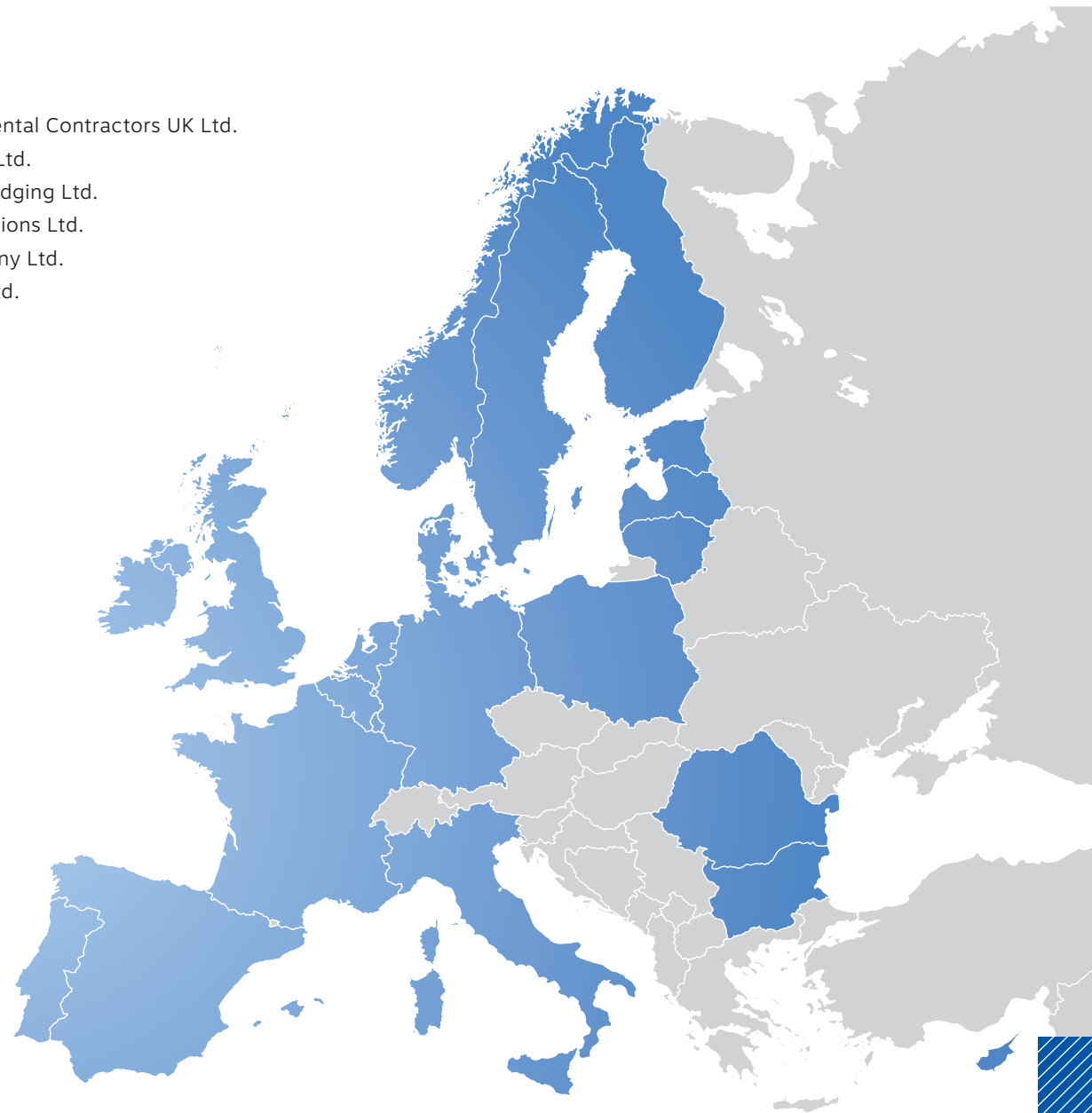
Jan De Nul U.K. Ltd.

Llanelli Sand Dredging Ltd.

NewWaves Solutions Ltd.

Rock Fall Company Ltd.

Van Oord U.K. Ltd.



EUDA VERIFICATION COMMITTEE

The purpose of the Verification Committee is to independently verify EuDA's annual accounts 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.

2021
Members of
the Verification
Committee



Mieke Fordeyn
(Jan De Nul)



Hilde Vermeire
(DEME)



EuDA celebrates
its 30th Anniversary
in 2023

ABOUT EUDA

Celebrating its 30th Anniversary in 2023, 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, OECD 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 8.2 bn Euro in 2020. 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.



EuDA Secretariat Paris Sansoglou, Secretary General Vassia Nikolopoulou, secretary

148, Avenue Grandchamp 1150 Brussels Belgium T. +32 (0)2 646 81 83 F. +32 (0)2 646 60 63 E-mail info@euda.be www.european-dredging.eu