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Policy and market developments in non-WP6 economies

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1. Executive summary

In 2022, the share of non-WP6 economies in global ship deliveries showed an increase compared to the previous year. It accounted for 53.8% of world total, an increase from 47.5% in 2021. People's Republic of China's (hereafter 'China') remained the largest shipbuilding economy in global ship completions in 2022. China represented 46.6% of all CGT delivered worldwide, a slight increase from 46.4% in 2021. China was also listed on the top on support measures, with 9 out of 31 measures found by the Secretariat. As agreed in its Programme of Work and Budget (PWB) for 2023 and 2024, this report provides an overview of the measures supporting the shipbuilding industry and of the development of the shipbuilding market in selected non-WP6 members.

Over the last twenty years, the share of non-WP6 economies in global ship deliveries has more than doubled, from 23.6% in 2002 to 53.8% in. This rise was mostly driven by the rapid growth of China's ship completions, which reached 46.6% of global completions in 2022, up from 9.1% in 2002. China's share of ship deliveries by non-WP6 economies also more than doubled, from 38.5% in 2002 to 86.6% in 2022. This is attributable to the large-scale expansion of facilities by China's shipbuilders from 2003 to 2008 and the Chinese government's policy efforts to promote the shipbuilding industry as a major strategic export industry since 2001. About half of new orders between 2018 and 2022 came from Chinese ship-owners. In 2022, China remained the largest shipbuilding economy in terms of both ship completions and new contracts. Eleven non-WP6 members ranked in the top economies in terms of ship completions and new orders in terms of compensated gross tonnes (CGT). The Secretariat analysed the shipbuilding market developments in these selected eleven economies including China, Viet Nam, the Philippines, Indonesia, France, Chinese Taipei, United States, Malaysia, Bangladesh and India.

Since the mid-2010s, the Philippines, Indonesia, Chinese Taipei and Malaysia have experienced a substantial decline in their production of seagoing vessels. By contrast, Viet Nam, Bangladesh and India's shipyards performed relatively well. Especially, new orders to Vietnamese shipyards increased 3.6 times from 2020 to 2022. France recovered its pre-COVID-19 trend in terms of ship completions which increased 1.6 times in 2022 compared to 2019.

Table 1. Completions and new contracts of seagoing vessels in terms of CGT by selected non-WP6 economies, 2018-2022

Completions			Contracts		
	Economy	Million CGT		Economy	Million CGT
1	China	64.4	1	China	81.2
2	Viet Nam	2.16	2	Viet Nam	2.25
3	Philippines	2.15	3	Philippines	1.47
4	Indonesia	1.69	4	Russia	1.24
5	France	1.47	5	France	0.97
6	Russia	0.84	6	Indonesia	0.94
7	Chinese Taipei	0.74	7	Chinese Taipei	0.49
8	United States	0.74	8	United States	0.39
9	Malaysia	0.48	9	Malaysia	0.34
10	Bangladesh	0.47	10	India	0.32
Others (30 economies)		3.06	Others (29 economies)		1.75
Total (40 economies)		78.2	Total (39 economies)		91.4

Source: OECD calculations based on Clarksons (2023, World Fleet Register, https://www.clarksons.net/wfr.

The Secretariat found 31 measures in this report (see Table 2 below) compared to 22 last year. The categories of support measures are the same as in the WP6 Inventory exercise. The types of support measures from A to O in the Table 2 are explained in Table 26. Research of support measures is difficult given the lack of official information in most economies. The Secretariat needs to rely on indirect sources, often press articles. This means that there is a high risk that various support measures taken by non-WP6 economies are not mentioned in this report given the fact that information on them is not publicly available or has not been found by the Secretariat.

China used the largest number of support measures (9), followed by the United States (6) as was the case last year. Looking at previous editions of the inventory of support measures taken by non-WP6 members, it seems that economies are using a wide variety of support measures depending on their needs and are not using specific types of support for a given economy. Many of the support measures to protect the domestic market (category M) have been announced by China; the UK is leading the number of measures for support for research and development (category K).

In terms of categories, the most frequent type of support measures, found seven times, is the Protection of the domestic market (category M) which is similar to the number of measures found in the previous report. They are followed by six support measures found for the category A (Direct transfer of funds by Governments) and four support measures of each for the category H (Government revenue that is foregone or not collected), the category K (Support for Research and Development) and the category O (Other official regulations and practices). All these measures can be very distorting for the international shipbuilding markets.

Table 2. Number of support measures reported in the WP6 Inventory of non-WP6 economies*

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	**Total**
Argentina					1											**1**
Bangladesh	1		1													**2**
Canada	1															**1**
China									1		1		4		3	**9**
India	2												1	1		**4**
New Zealand												2				**2**
Philippines								2								**2**
United Kingdom											3				1	**4**
United States	2			1				2					1			**6**
Total	6		1	1	1			4	1		4	2	6	1	4	**31**

* In alphabetical order
Source: OECD calculations

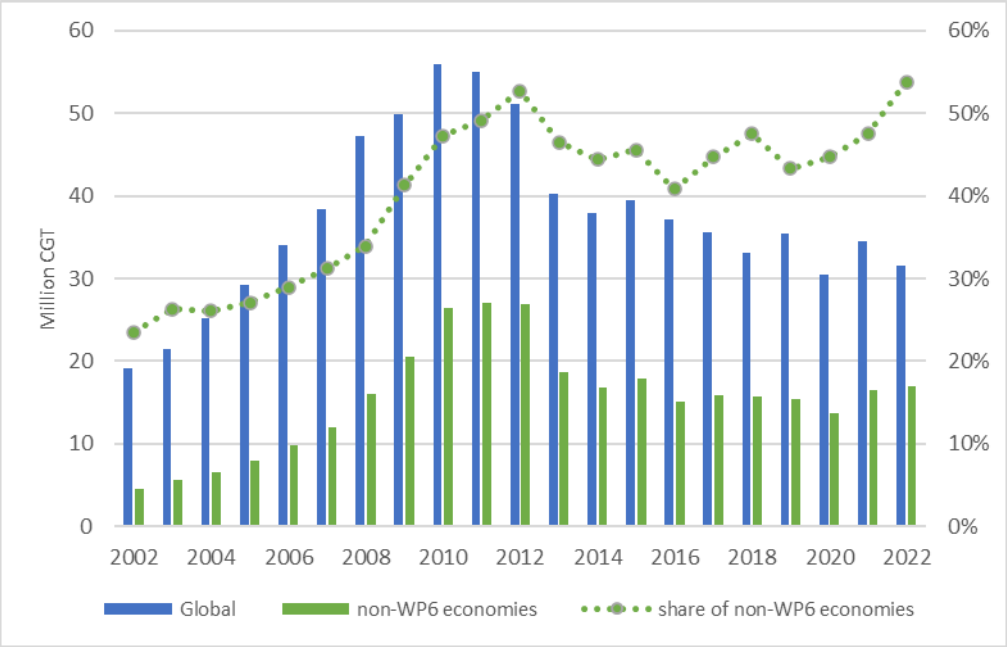
2. Shipbuilding market developments in non-WP6 economies

2.1. Overview

Over the last twenty-one years, the global market share of non-WP6 economies has been steadily increasing (Figure 1). The global share of ship completions by shipyards in non-WP6 economies increased from 23.6% in 2002 to 52.7% in 2012 and has fluctuated between 40 and 50% since then. In 2022, ship completions by non-WP6 economies amounted to 17.0 million CGT, accounting for 53.8% of world total.

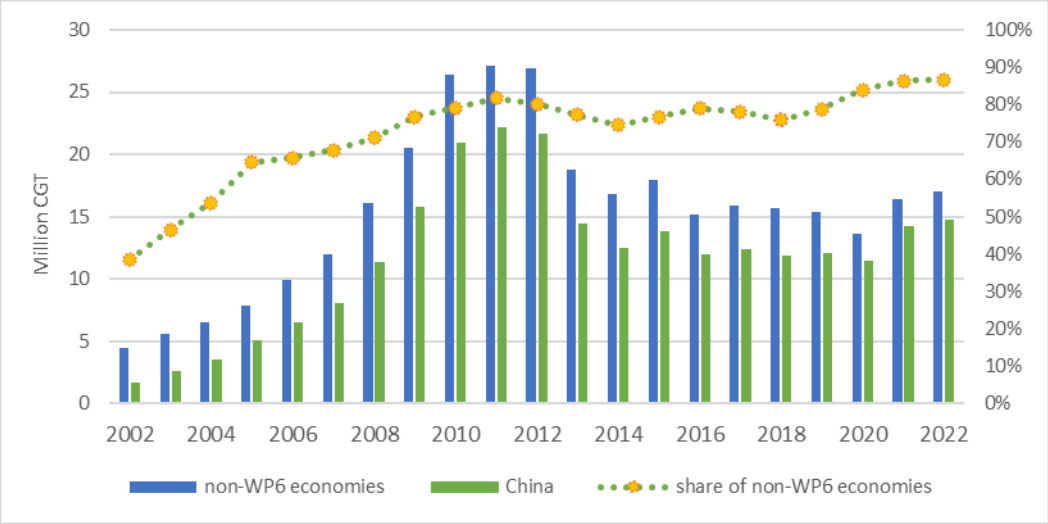
The increase in the share of non-WP6 economies in global ship completions is largely due to the rapid growth of China' ship production since 2001 (Figure 2). From 2002 to 2012, the twelve-fold increase of China's ship production led China to become the world's largest shipbuilding economy in 2010. This is attributable to the large-scale expansion of facilities by China's shipbuilders during the historic boom period from 2003 to 2008 and the Chinese government's policy efforts to promote the shipbuilding industry as a major strategic export industry since 2001. Accordingly, China's share of ship completions in non-WP6 economies also nearly doubled from 38.5% in 2002 to 80.2% in 2012. In 2022, China remained the largest shipbuilding economy with seagoing vessel completions amounting to 14.7 million CGT, representing 46.6% of the world total. China's share of non-WP6 economies reached 86.6% in 2022.

Figure 1. Completions in CGT and global market shares, 2002-2022



Note: This Figure includes all seagoing vessels from 100 GT. WP6 economies include WP6 members at the end of 2022.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Figure 2. Share of China in non-WP6 economies in terms of CGT, 2002-2022



Note: This Figure includes all seagoing vessels from 100 GT. WP6 economies include WP6 members at the end of 2022. Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

At the end of 2022, the orderbook of non-WP6 economies' shipyards included 2,964 vessels on order, amounting to 56.8 million CGT and representing 50.7% of the world total (Table 3). China accounted for 44.4% of the global orderbook in terms of CGT. France and Vietnam followed China with 1.1% of the global orderbook, respectively.

Table 3. Orderbook of selected non-WP6 economies, December 2022

Economy	Number of ships	Million CGT	% of total CGT
Global	4747	112.06	100%
WP6 economies	1783	55.26	49.3%
Non WP6 economies	2964	56.80	50.7%
China	2108	49.78	44.4%
France	14	1.27	1.1%
Viet Nam	99	1.23	1.1%
Russia	91	1.14	1.0%
Philippines	58	0.99	0.9%
United States	56	0.34	0.3%
India	45	0.23	0.2%
Indonesia	104	0.23	0.2%
Singapore	42	0.23	0.2%
Spain	41	0.17	0.2%
Chinese Taipei	9	0.16	0.1%
Bangladesh	63	0.16	0.1%
Malaysia	65	0.12	0.1%
Unknown	23	0.03	0.0%
Others (25 countries)	146	0.71	0.6%

Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2. Recent market developments of selected shipbuilding economies

According to Clarksons' World Fleet Register, during the last five years (2018-2022), 40 non-WP6 economies have built more than one seagoing vessel (100 GT or more) and 39 economies have received more than one new order.

Eleven of these economies ranked in the top economies for ship completions and new orders in terms of CGT (Table 4). The Secretariat analysed the shipbuilding market developments in these economies including China, Viet Nam, the Philippines, Indonesia, France, Russia, Chinese Taipei, United States, Malaysia, Bangladesh and India.

Table 4. Completions and new contracts of seagoing vessels in terms of CGT by selected non-WP6 economies, 2018-2022

Completions			Contracts		
	Economy	Million CGT		Economy	Million CGT
1	China	64.4	1	China	81.2
2	Viet Nam	2.16	2	Viet Nam	2.25
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Others (30 economies)		3.06	Others (29 economies)		1.75
Total (40 economies)		78.2	Total (39 economies)		91.4

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.1. China

China' shipbuilding companies can be classified into three broad categories according to ownership structure: state-owned enterprises (SOEs), private domestic shipbuilding enterprises, and joint ventures of foreign and domestic companies (Table 5). In terms of completions in CGT, 46 of the largest 100 Chinese shipyards are owned by the central and local governments and thus are SOEs. The share of completions by SOEs owned by local governments is 6 % of top 100 shipyards in China. It is much smaller than that of completions by SOEs owned by national government, 58.1%. For private companies, the share of completions by the shipyards owned by domestic owners is larger than that of completions by the shipyards owned by foreign owners. The top 100 Chinese shipyards represented about 98% of all CGT delivered in China in 2020.

Table 5. Ownership structure of the top 100 Chinese shipyards in 2020

Ownership Type	SOEs		Private companies	
	National government	Local government	Domestic owner(s) only	Foreign owner(s)
Number of shipyards	36	10	47	7
Completions in CGT ('000s)	6 343	653	3 345	583
% of completions	58.1%	6.0%	30.6%	5.3%

Note: This table includes all seagoing vessels from 100 GT. The ownership type is based on the information on yard administration (meaning a majority state ownership) in World Fleet Register of Clarksons Research Services.
Source: OECD calculations based on Clarkson Research Services Limited (February 2021), World Fleet Register, https://www.clarksons.net/wfr.

The largest Chinese shipbuilding conglomerate is the China State Shipbuilding Corporation (CSSC), which was created in 2019 by the merger of the two largest state-owned shipbuilders, China Shipbuilding Industry Corporation (CSIC) and CSSC. As of 2022, the shipyards owned by CSSC accounted for 28.7% of all CGT delivered in China. Considering that the figure in 2021 was 35.2%, the share decreased a bit. This is because CSSC's production decreased slightly from 4,562 thousand CGT in 2021 to 4,238 Thousand CGT in 2022 while overall completion in China increased from 12,956 Thousand CGT in 2021 to 14,745 Thousand CGT in 2022.

Another major shipbuilding conglomerate is COSCO Shipping Heavy Industry, which is a subsidiary of the COSCO shipping group (*i.e.* the largest state-owned shipping operator in China). COSCO Shipping Heavy Industry owns nine shipyards. Major shipyards under its direction are COSCO HI (Zhoushan), COSCO HI (Yangzhou), COSCO HI (Guangdong), COSCO HI (Dalian), Nantong COSCO KHI, and Dalian COSCO KHI. As of 2022, the shipyards of COSCO shipping heavy industry accounted for 10.3% of all CGT delivered in China.

The Yangzijiang Shipbuilding Group, established in 1956, is China's largest private shipbuilder. The group owns four shipyards, which are located along the Yangtze River in the province of Jiangsu. These yards are Jiangsu New Yangzi Shipbuilding, Jiangsu Yangzi Xinfu Shipbuilding, Jiangsu Yangzijiang Offshore Engineering, and Jiangsu Yangzijiang shipbuilding. As of 2022, the shipyards of Yangzijiang Holdings accounted for 11.5% of all CGT delivered in China.

Table 6. Ship completions of major shipbuilding groups of China in 2022

Group	Ownership	Completions	
		CGT('000)	% of total
CSSC	State-owned	4,238	28.7%
COSCO Shipping HI	State-owned	1,519	10.3%
China Merchants	State-owned	890	6.0%
Yanzijiang Holdings	private	1,698	11.5%
New Century Shipbuilding	private	634	4.3%
Others		5,766	39.1%
Total		14,745	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Despite the weak demand in the global shipbuilding market and the restructuring of the Chinese shipbuilding industry, China' seagoing vessel production has been fluctuating

between 11 million and 14 million CGT per year since 2014 (Figure 3). In 2022, China remained the largest shipbuilding economy in both ship completions and new contracts. China represented 46.6% of all CGT delivered worldwide and 49.5% of all CGT contracted in 2022, a slight increase from 46.4% and 49.2% in 2021.

Figure 3. Completions and new contracts of seagoing vessels by Chinese shipyards, 2011-2022

Note: This figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

China's shipyards have been producing almost all kinds of vessel types in the past twelve years (Table 7). Bulk carriers, tankers and container ships are the main ship types manufactured by Chinese shipbuilders, accounting for 78% of total CGT delivered in China for the past twelve years.

Table 7. Completions of seagoing vessels by ship type in China, 2011-2022

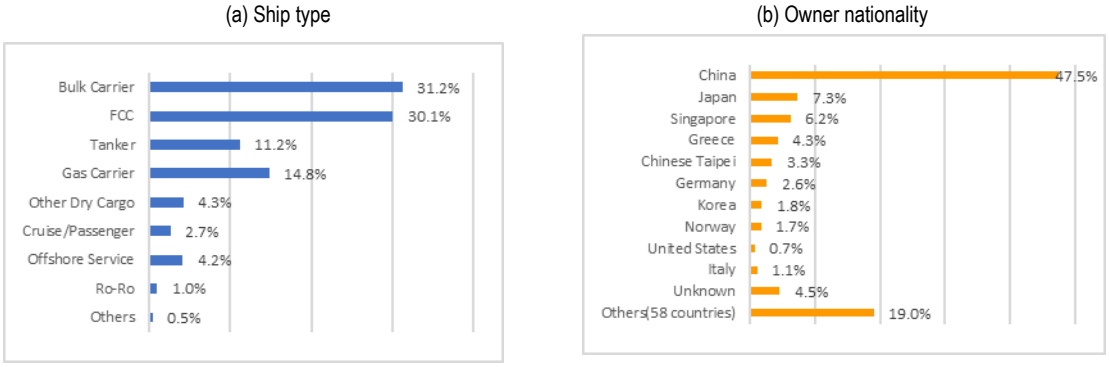
Type	CGT ('000)	% of share
Bulk Carrier	80,024	46.2%
Tanker	29,807	17.2%
FCC	25,342	14.6%
Offshore Service	11,012	6.4%
Other Dry Cargo	10,684	6.2%
Gas Carrier	5,418	3.1%
Cruise/Passenger	3,627	2.1%
PCC	1,929	1.1%
Ro-Ro	1,320	0.8%
Reefer	449	0.3%
Others	3,725	2.1%
Total	173,338	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Recent new orders to Chinese shipbuilders have been concentrated in three major ship types; bulk carriers, tankers and containerships account for 72.5% of total CGT contracted between 2018 and 2022. Notably, gas carriers accounted for 5.5% of total CGT contracted

between 2018 and 2021, however it increased to 14.8% between 2018 and 2022. New orders for gas carriers in 2022 increased nearly 4 times compared to 2021. According to Clarksons Research, Chinese owners ordered a record of 29 LNG carriers of 3.1m GT in 2022, accounting for 24% of total tonnage ordered by Chinese owners and exceeding Chinese owners' total LNG carrier ordering across the last decade[1]. Chinese shipbuilders won new orders from 68 countries in the last five years. About half of the new orders came from Chinese ship-owners. As of February 2023, China's shipowners owned the second largest fleet in the world, after Greece, representing 238.6 million GT, and accounting for about 15.4% of the world total[2]. Most of China's shipping companies are SOEs.

Figure 4. New contracts in Chinese shipyards by ship types and by ship owner nationalities, 2018-2022, in terms of CGT



Note: This figure includes all seagoing vessels from 100 GT. The percent share is based on CGT and China includes Hong Kong. Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.2. Viet Nam

Viet Nam's shipyards can be divided into three categories: subsidiaries of the Shipbuilding Industry Cooperation (SBIC), other state-owned enterprises, and foreign invested enterprises (Table 8). The SBIC is the largest state-owned shipbuilding corporation in Viet Nam, which produces various types of vessels, including tankers, bulk carriers, container ships, car carriers and passenger ships.

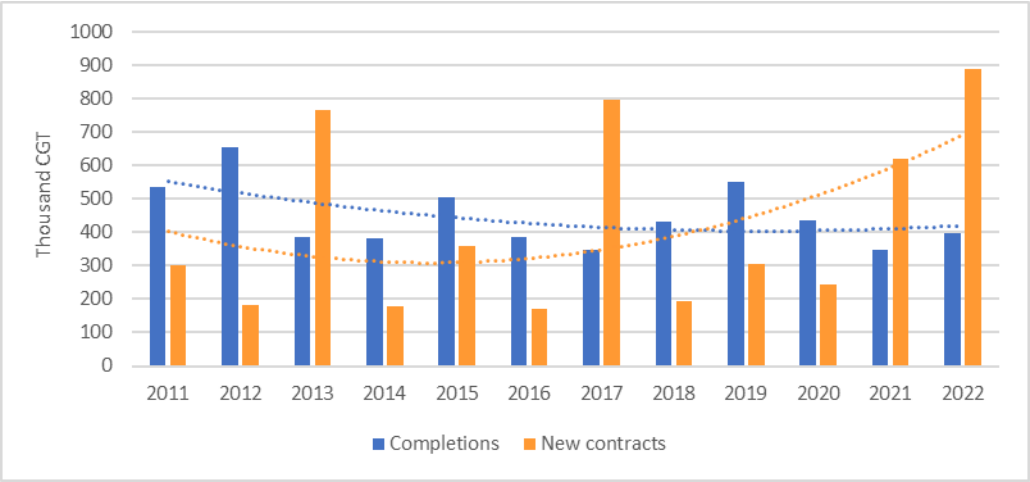
Table 8. Major shipyards in Viet Nam

Category	Name of Shipyard
SBIC	Ha Long Shipbuilding, Pha Rung Shipyard, Nam Trieu Shipbuilding Industry, Bach Dang Shipbuilding Industry, Song Cam Ship, Thinh Long Shipyard, Cam Ranh Shipyard, Saigon Shipbuilding Industry, Saigon Shipbuilding and Maritime Industry, 76 Shipyard
Other SOEs	Lilama Shipyard, Dung Quat Shipyard, PTSC Mechanical and Construction, PV shipyard, Hong Ha Shipyard, Z189 Shipyard, Ba Son Shipyard, Song Thu Shipyard
Foreign Invested Enterprises	Damen Song Cam Shipyard, Hyundai Viet Nam Shipbuilding, Strategic Marine Shipyard, Piriou Viet Nam, Vard Viet Nam, Oshima Shipbuilding Viet Nam

Source: "Viet Nam Maritime Industry", Presentation at ASEF 9th Forum[3].

Despite the downturn in global shipbuilding market, the production of seagoing vessels in Viet Nam has remained rather stable around 0.4 million CGT per year since 2013 (Figure 5). New orders to Vietnamese shipyards show an increasing pattern since 2018. Orders increased 3.6 times from 243 730 CGT in 2020 to 886 635 CGT in 2022.

Figure 5 Completions and new contracts of seagoing vessels by Vietnamese shipyards, 2011-2022



Note: This figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Vietnamese shipyards have been producing a variety of vessel types over the last twelve years, including tankers, bulk carriers, other dry cargo ships, offshore service vessels, cruise/passenger ships, container ships, car carriers and gas carriers. Tankers and bulk carriers have been the main ship types produced by Vietnamese shipyards, accounting for 68.8% of total CGT delivered for the past twelve years.

Table 9. Completions of seagoing vessels by ship type in Viet Nam, 2011-2022

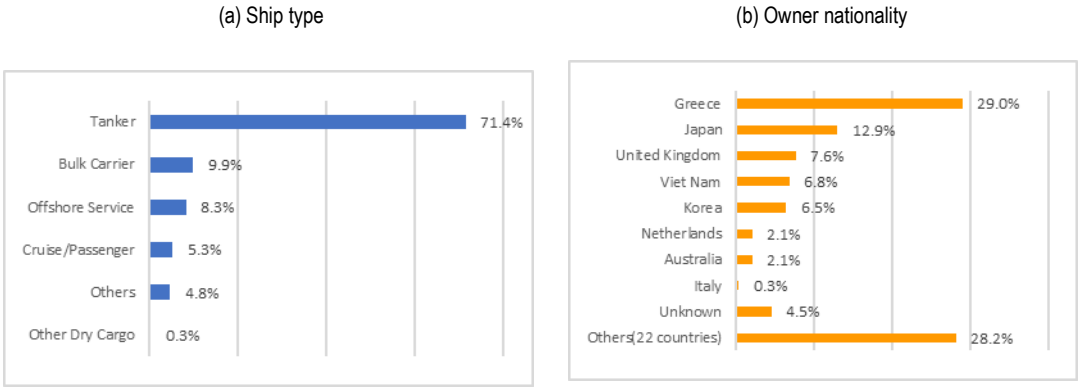
Type	CGT('000)	% of total
Tanker	2,404	44.9%
Bulk Carrier	1,281	23.9%
Other Dry Cargo	579	10.8%
Offshore Service	440	8.2%
Cruise/Passenger	187	3.5%
FCC (Fully Celluar Container)	62	1.2%
PCC (pure car carrier)	29	0.5%
Gas Carrier	20	0.4%
Others	352	6.6%
Total	5,354	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

During the last five years (2018-2022), Vietnamese shipyards received new orders for a total of 2,251,831 CGT seagoing vessels. Tankers made up the largest category in these new contracts, accounting for 71% of total CGT contracted in Viet Nam with Hyundai Vietnam Shipbuilding Corporation receiving all the tanker orders (44 vessels of tonnage between 50,000 DWT and 115,000 DWT). Hyundai Vietnam Shipbuilding was established in 1999 as a joint venture between SBIC and Hyundai Mipo Dockyard (HMD) of Korea and has become the leading shipyard in Viet Nam with an annual capacity of 20 vessels[4].

In the last five years, Vietnamese shipyards received new orders from 30 countries; about 49.5% of the total CGT contracted was from ship owners in Greece, Japan, and the United Kingdom (Figure 6). The share of domestic orders was only 7.6%.

Figure 6. New contracts in Vietnamese shipyards by ship types and by ship owner nationalities, 2018-2022, in terms of CGT



Note: This figure includes all seagoing vessels from 100 GT. The percent share is based on CGT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.3. Philippines

According to the Maritime Industry Authority (MARINA) of the Philippines, there are 115 registered shipbuilding and ship repair entities in the Philippines as of 2019: 6 large, 15 medium and 94 small shipyards. There are also many service providers that are not labelled as shipyards by MARINA in the Philippines. They are listed as contractors or afloat repair.

Most of the medium and small sized shipyards are domestic companies. Most of the large and export-oriented shipyards are foreign-owned. Among the six largest shipyards in the Philippines, four are subsidiaries of foreign shipbuilding companies (Table 10).

Table 10. Major Shipbuilding companies in the Philippines

Company name	Location	Ownership	Facilities	Manpower
Herma Shipyard	Bataan	The Philippines	Graving dock: 15 000 GT Floating dock: 1 600 GT	Permanent: 60 Contract: 353
Keppel Subic shipyard	Subic	Singapore	Graving dock: 550 000 DWT	Permanent: 152 Contract: 300
Subic Drydock Corporation	Subic	USA (Subsidiary of Cebras Marine Corp)	Floating dock: 18 000 DWT 4 000 DWT	Permanent: 35 Contract: -
Keppel Batangas Shipyard	Batangas	Singapore	Graving dock: 400 000 DWT	Permanent: 170 Contract: 187
F.F. Cruz & Co.	Iloilo	The Philippines	Floating dock: 500 GRT	Permanent: 43 Contract: 35
Tsuneishi heavy industries (Cebu)	Cebu	Japan	Floating dock: 20 000 DWT 8 500 ton	Permanent: 75 Contract: 804

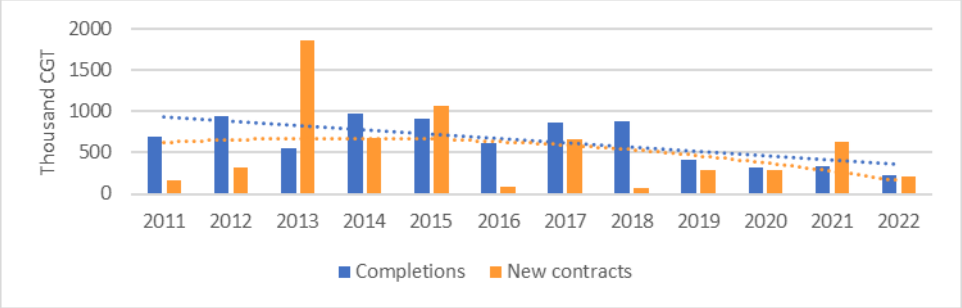
Note: Manpower includes skilled and technical employees.
Source: MARINA and Websites of each company.

The large shipyard of Hanjin Subic, which was one of the major shipyards that contributed to the Philippines' success to become one of the major shipbuilding economies in the world, filed for court receivership in January 2019. In 2019, at least eight foreign companies reported expressed interest in the shipyard to officials in the Philippines. By the summer of

2021, the Subic Bay Metropolitan Authority was reporting that a U.S. firm, Cerberus, had been selected. [5].

Over the last twelve years, production of seagoing vessels in the Philippine and new orders to Philippine shipyards have been fluctuating in response to the developments in the global shipbuilding market (Figure 7). In terms of ship completions in CGT, their production sharply decreased by more than half from 873 141in 2018 to 406 486 in 2019, reflecting the bankruptcy of Hanjin Subic shipyard. New orders have been oriented upwards since 2018 based on CGT, however, both completions and new contracts in 2022 dropped compared to 2021.

Figure 7. Completions and new contracts of seagoing vessels by the Philippines' shipyards, 2011-2022



Note: This figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

The Philippines' shipyards have been producing a variety of vessel types over the last twelve years, including bulk carriers, container ships, tankers, gas carriers, passenger ships, reefer vessels and offshore service vessels (Table 11). Bulk carriers and container ships have been the main ship types made by Philippine shipyards, accounting for nearly 90% of total CGT delivered for the past twelve years.

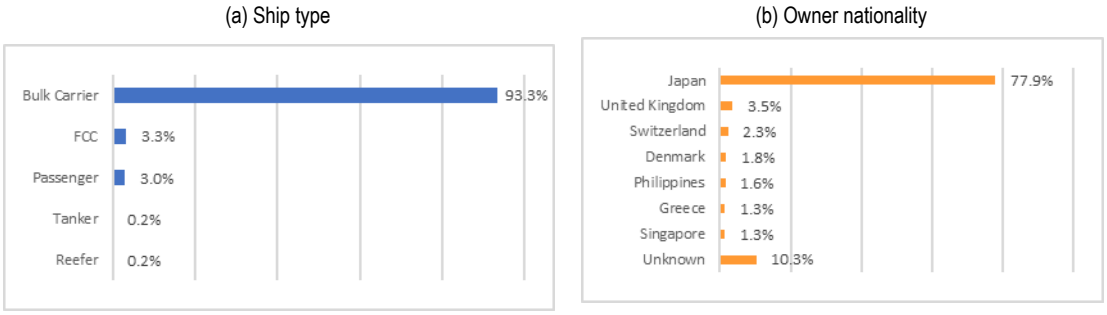
Table 11. Completions of seagoing vessels by ship type in the Philippines, 2011-2022

Type	CGT('000)	% of total
Bulk Carrier	4520	58.6%
FCC (Fully Cellular Container)	2414	31.3%
Tanker	436	5.6%
Gas Carrier	163	2.1%
Passenger	123	1.6%
Reefer	31	0.4%
Offshore Service	15	0.2%
Others	14	0.2%
Total	7716	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

During the last five years (2018-2022), Th Philippines' shipyards have won orders for seagoing vessels representing a total tonnage of 1,486,887 CGT. More than 90 percent of these new contracts were concentrated in bulk carriers. Japanese ship owners accounted for 77.9% of these new contracts in terms of CGT (Figure 8).

Figure 8. New contracts in the Philippines' shipyards by ship types and by ship owner nationalities, 2018-2022, in terms of CGT



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2.2.4. Indonesia

Two hundred-fifty shipyards are located in Indonesia, mostly centred in Batan, Jakarta, Lampung and East Java. Total annual production capacity of Indonesian shipyards is about 1 million DWT for new shipbuilding and about 12 million DWT for ship repair. Almost 80% of the shipyards are categorized as small and medium sized shipyards, with production facilities up to 5,000 DWT.

The two largest shipbuilders in Indonesia are PT PAL and PT Dok Dan Perkapalan Kodja Bahari, both of which are state-owned and build ships for commercial and military purposes.

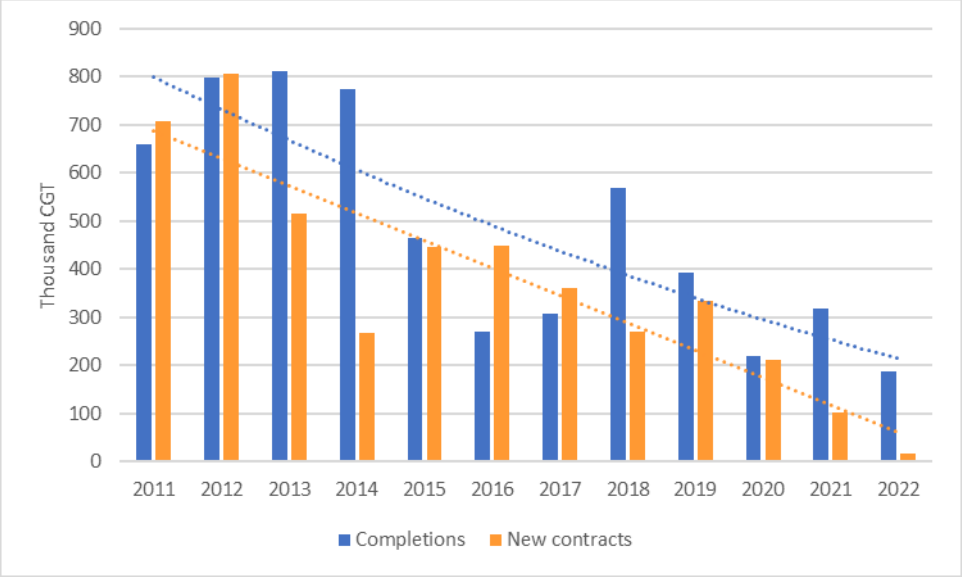
Table 12. Overview of the two major shipyards in Indonesia

Name	Ownership	Facilities
PT PAL Indonesia (https://pal.co.id)	State-owned	· Naval shipbuilding, commercial shipbuilding and ship repair · Production capacity of 1 600 ton per month, or the equivalent of 3 ships per year (two 30 000 DWT tankers and one 17 500 DWT tanker) - Bulk Carrier up to 50 000 DWT, Container ships up to 1 600 TEUs, Tankers up to 30 000 DWT, Passenger ships up to 500 PAX, etc.
PT Dok Dan Perkapalan Kodja Bahari (Persero) (https://dkb.co.id)	State-owned	· Commercial shipbuilding and ship repair, naval shipbuilding - Shipbuilding up to 17 500 DWT and ship repair up to 30 000 DWT

Source: Websites of each company.

Over the last twelve years, production of seagoing vessels in Indonesia and new orders to Indonesian shipyards have been steadily declining based on CGT (Figure 9). In 2022, contracts decrease by 83% compared to the previous year while completions decreased by 41%.

Figure 9. Completions and new contracts of seagoing vessels by Indonesian shipyards, 2011-2022



Note: This figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Indonesian shipyards have been producing a variety of vessel types over the last twelve years, including tugboats, passenger ships, offshore service vessels, tankers, dry cargo ships, bulk carriers, buoy/lighthouse tenders and work/repair vessels (Table 13). Tugboats accounted for 53% of total CGT delivered in Indonesia. These tugs are typically used in smaller ports where regular sized vessels cannot access.

Indonesia was the largest tugboat producer worldwide in the past twelve years, followed by China and Malaysia (Table 14). Due to high demand for inter-island transportation of bulk materials, Indonesia has the world's largest tug fleet at around 3,600 vessels, and domestic tug numbers are expected to grow over the next five years as ports are upgraded and population growth drives demand for bulk product transportation, particularly coal[6]. Therefore, the high domestic demand for tugboats seems to have contributed significantly to the growth of Indonesian tugboat builders.

Table 13. Completions of seagoing vessels by ship type in Indonesia, 2011-2022

Type	CGT('000)	% of total
Tug	3083	53.4%
Passenger	982	17.0%
Offshore Service	610	10.6%
Tanker	488	8.4%
Other Dry Cargo	478	8.3%
FCC (Fully Cellular Container)	47	0.8%
Bulk Carrier	9	0.2%
Buoy/Lighthouse Tender	35	0.6%
Work/Repair Vessel	35	0.6%
Others	9	0.2%
Total	5777	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

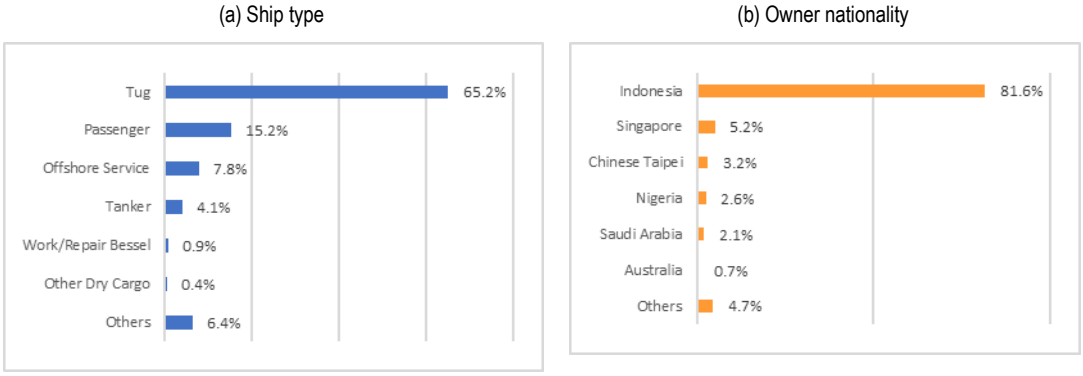
Table 14. Completions of tugs by building economies, 2011-2022

Economy	CGT('000)	% of world total
Indonesia	3087	28.1%
China	2143	19.5%
Malaysia	1191	10.8%
United States	581	5.3%
Türkiye	681	6.2%
Netherlands	370	3.4%
Viet Nam	346	3.2%
Japan	333	3.0%
Brazil	239	2.2%
Spain	189	1.7%
Others (43 countries)	1820	16.6%
Total	10980	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

More than half of the new orders at Indonesian shipyards in the past five years were tugboats (Figure 10). In addition, unlike neighbouring countries such as the Philippines and Viet Nam, about 82% of all new orders to Indonesian shipyards were from domestic ship owners.

Figure 10. New contracts in Indonesian shipyards by ship types and by ship owner nationalities, 2018-2022, in terms of CGT



Note: This figure includes all seagoing vessels from 100 GT. The percent share is based on CGT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.5. France

According to GICAN (the French marine industry association), as of 2022, the total turnover of French marine industry amounted to EUR 13.5 billion, compared to EUR13.2 billion in 2021. 54% of the activity is intended for export, against 52% in 2021. Also, these proportions are varied according to the sectors, defence and civil. For the defence sector, 39% of turnover is for export in 2022, but it is 89% for the civil sector. (Table 15).

Table 15. Key figures of the French shipbuilding industry in 2022

Turnover: 13.5 billion Euros	
Activity of the French shipbuilding industry by type of activity and market (in turnover, %)	Activity of the French shipbuilding industry by market (in turnover, %)
- Defence: In France 61%, Internationally 39%	- In France: 46%
- Civilian maritime: In France 11%, Internationally 89%	- Internationally: 54%

Source: GICAN, The French naval industry in figures, 2022-2023.

The main shipyards in France are listed in Table 16 by their main business activities. Most French shipyards build both defence and civilian ships and there are some shipyards dedicated to the defence sector only such as Naval group. Except for the defence sector shipyards, Chantiers de l'Atlantique is the largest shipyard in France, followed by PIRIOU and OCEA S.A..

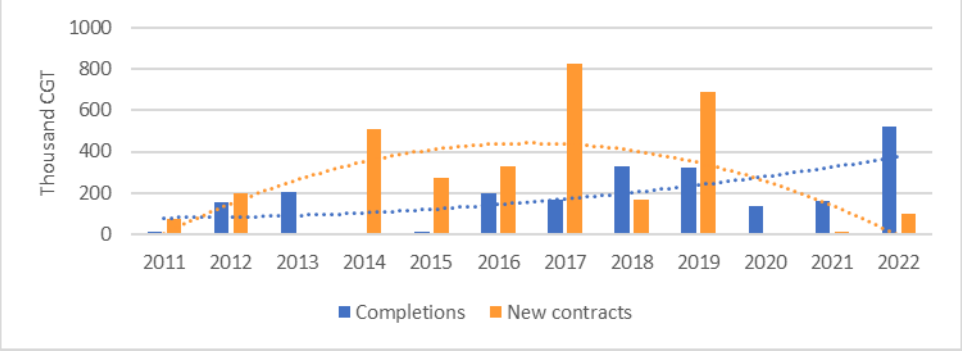
Table 16. Main shipyards in France

1. Civil and Defence	2. Defence	3. Ship repair yard
- Chantiers de l'Atlantique, PIRIOU, OCEA S.A., Socarenam, Chantier Naval COUACH (CNC), ZODIAC MILPRO International, EFINOR	- Naval group, CMN (Constructions Mécaniques de Normandie), Kership, UFAST	- Monaco Marine, Chantier Naval de Marseille (CNDM), DAMEN Ship repair Brest, Damen Ship repair Dunkerque

Source: GICAN

Despite the sluggish movement of the global shipbuilding market after the global financial crisis, French shipyards' activity has been recovering quickly (Figure 11). Chantiers de l'Atlantique received numerous orders for large cruise ships since 2010. However, because of the impact of the COVID-19 pandemic on the cruise shipbuilding market, between 2020 and 2021, French shipyards did not receive any orders for cruise vessels based on Clarksons database. In 2022, French shipyards received 5 Sea-going Merchant Vessels more than 100 GT including 2 cruise vessels. Overall, compared to 2021, completions have tripled and new contracts have increased eightfold.

Figure 11. Completions and new contracts of seagoing vessels by French shipyards, 2011-2022



Note: This figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Cruise ships are the main ship type built by French shipyards, accounting for 96% of total CGT delivered for the past twelve years. France is the third largest cruise shipbuilder worldwide after Italy and Germany (Table 18). 97% of new orders for cruise ships came from Switzerland and American ship owners.

Table 17. Completions of seagoing vessels by ship type in France, 2011-2022

Type	CGT('000)	% of total
Passenger	32	1.4%
Cruise	2135	96.2%
Tug	18	0.8%
Offshore Service	9	0.4%
Others	24	1.1%
Total	2219	100.0%

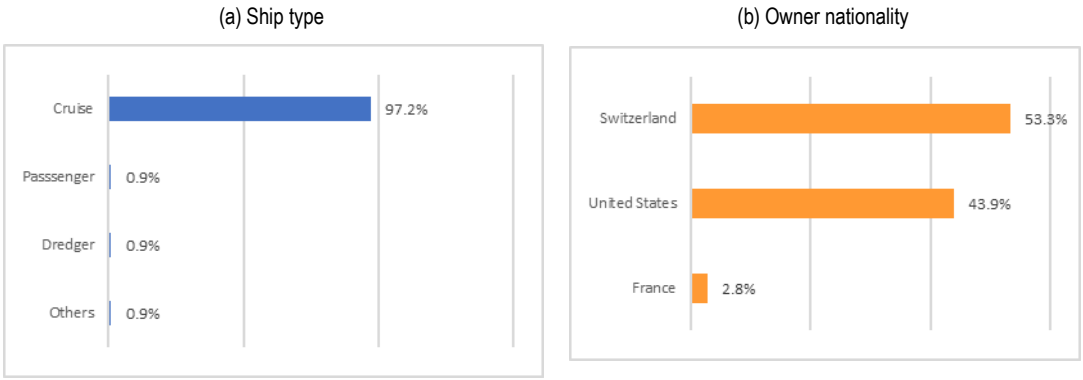
Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Table 18. Completions of cruise ships by building economies, 2011-2022

Economy	CGT('000)	% of world total
Italy	5064	37.3%
Germany	3602	26.5%
France	2135	15.7%
Finland	1381	10.2%
Norway	517	3.8%
Japan	266	2.0%
Others	603	4.4%
Total	13569	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Figure 12. New contracts in French shipyards by ship types and by ship owner nationalities, 2018-2022, in term of CGT



Note: This figure includes all seagoing vessels from 100 GT. The percent share is based on CGT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.6. Chinese Taipei

According to the Ministry of Economic affairs of Chinese Taipei, as of 2019, Chinese Taipei has 188 shipbuilding establishments employing 7,442 employees[7]. Of these, 86% are small businesses with fewer than 50 employees (Table 19).

The Chinese Taipei International Shipbuilding Corporation (CSBC) is the largest shipbuilder in Chinese Taipei with two large shipyards in Keelung and Kaohsiung. It was partly privatised through an Initial Public Offering (IPO) in 2008, but the Chinese Taipei government is still the largest shareholder.

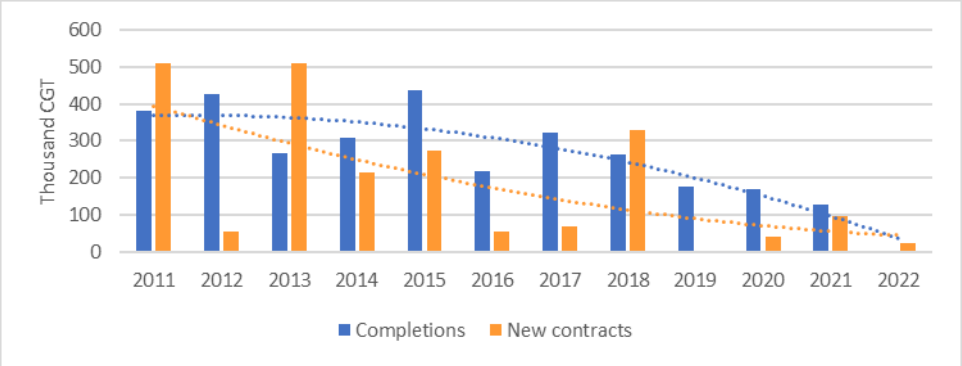
Table 19. Classification of Chinese Taipei shipbuilding industry

Classification	Shipyards	Business items
Large	Kaohsiung and Keelung of CSBC	Building container ships, bulk carriers, oil tankers, military and police ships.
Medium-sized	CITIC, Coating, Longde, Sanyang, Xinshengfa, Jiahong, and Unilai	Building official ships, bulk carriers, transportation ships, port service ships, work ships, yachts and fishing boats.
Small	-	Engaged in the production of fishing boats and ship repairs.

Source: Chinese Taipei Shipbuilding Industry Association (https://www.tsba.org.tw)

Over the last twelve years, completions of seagoing vessels in Chinese Taipei and new orders to Chinese Taipei's shipyards have been declining in terms of CGT (Figure 13). Compared to 2011, completions in 2022 decreased by 99% and new orders in 2021 by 95%.

Figure 13. Completions and new contracts of seagoing vessels by Chinese Taipei shipyards, 2011-2022



Note: This figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

The ship types produced in Chinese Taipei between 2011 and 2022 were container ships, bulk carriers, offshore service vessels, tankers, tugboats, dry cargo ships, reefer vessels, and passenger ships (Table 20). While Chinese Taipei's shipbuilders have been producing a variety of ship types, the Chinese Taipei shipbuilding industry is particularly known for the CSBC's ability to build large-capacity cellular container ships at comparative prices. The CSBC has built 64 container ships (1.8 million CGT) over the last twelve years, which has led Chinese Taipei to become the world's fourth largest containership building economy, after Korea, China and Japan (Table 21).

Table 20. Completions of seagoing vessels by ship type in Chinese Taipei, 2011-2022

Type	CGT('000)	% of total
FCC (Fully Cellular Container)	2435	78.5%
Bulk Carrier	313	10.1%
Offshore Service	149	4.8%
Tanker	77	2.5%
Tug	36	1.2%
Other Dry Cargo	26	0.8%
Reefer	23	0.7%
Passenger	18	0.6%
Others	25	0.8%
Total	3101	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

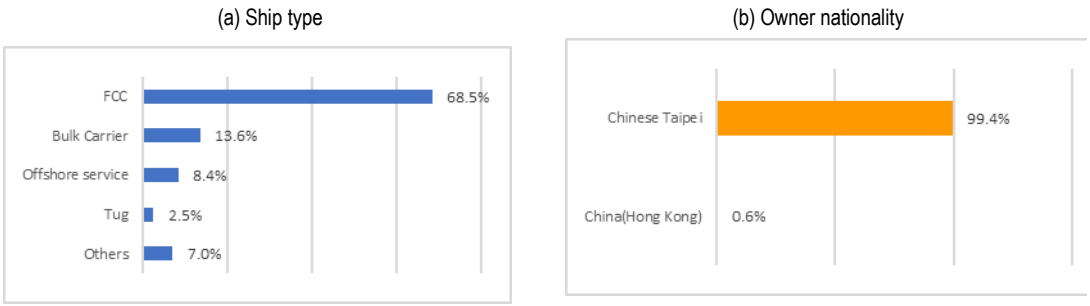
Table 21. Completions of FCCs by building economies, 2011-2022

Economy	CGT('000)	% of total
Korea	35912	48.6%
China	25342	34.3%
Japan	6706	9.1%
Chinese Taipei	2435	3.3%
Philippines	2414	3.3%
Romania	596	0.8%
Others (12 economies)	500	0.7%
Total	73905	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Recent orders to Chinese Taipei shipyards were concentrated in container ships, bulk carriers, and offshore service vessels (Figure 14). In particular the CSBC received the contracts of containerships and bulk carriers. Almost 100% of the orders was from Chinese Taipei ship owners (Figure 14). As of January 2023, Taipei owned the 10th largest fleet in the world, representing 40.3 million GT[8].

Figure 14. New contracts in Chinese Taipei's shipyards by ship types and by ship owner nationalities, 2018-2022, in term of CGT



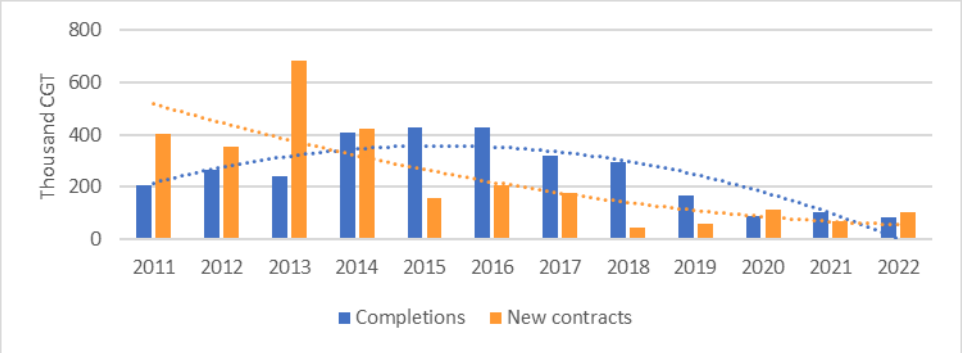
Note: This Figure includes all seagoing vessels from 100 GT. The percent share is based on CGT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.7. United States

According to the U.S. Maritime administration's 2021 report[9], there were 154 active shipyards across 29 states and more than 300 shipyards engaged in ship repair or capable of building ships but not actively engaged in shipbuilding. In 2019, total revenues of the American shipbuilding and repair industry amounted to USD 27.9 billion and 78.7% of the revenues came from military shipbuilding and repairs.

Over the last twelve years, completions of seagoing vessels in the United States peaked at 429,799 CGT in 2016 and has been declining since then. New orders to American shipyards have also been oriented downwards since 2013 (Figure 15).

Figure 15. Completions and new contracts of seagoing vessels by American shipyards, 2011-2022



Note: This figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

The ship types produced in the United States over the last twelve year were offshore service vessels, tugboats, tankers, cruise/passenger ships, roll-on/roll-off (Ro-Ro) vessels, container ships and dredgers (Table 22).

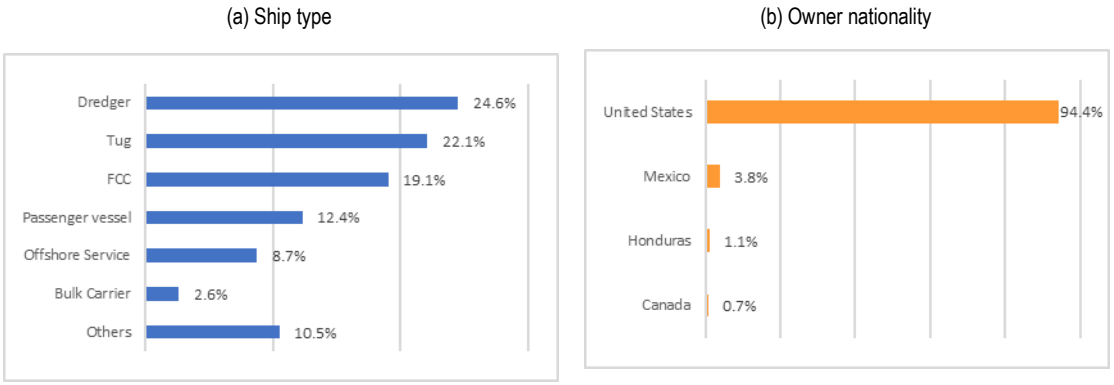
Table 22. Completions of seagoing vessels by ship type in the United States, 2011-2022

Type	CGT('000)	% of total
Offshore Service	1220	40.2%
Tug	581	19.1%
Tanker	551	18.2%
Cruise/Passenger	315	10.4%
Ro-Ro (roll-on/roll-off)	140	4.6%
FCC (Fully Cellular Container)	131	4.3%
Dredger	55	1.8%
Others	40	1.3%
Total	3034	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Recent orders to American shipyards were concentrated in dredgers, tug boats, container ships and passenger ships. These ship types accounted for 78% of total CGT ordered between 2018 and 2022. Most of the orders were from American ship owners (Figure 16).

Figure 16. New contracts to American shipyards by ship types and by ship owner nationalities, 2018-2022, in term of CGT



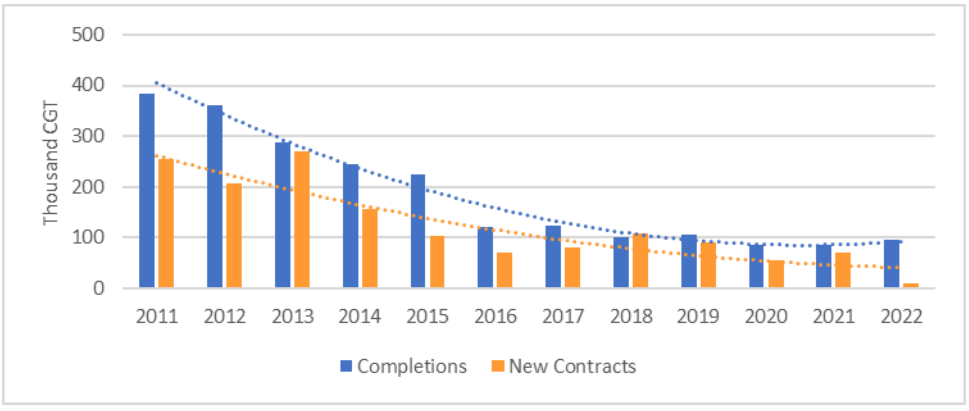
Note: This figure includes all seagoing vessels from 100 GT. The percent share is based on CGT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.8. Malaysia

According to the Malaysian Investment Development Authority[10], there are 99 registered shipyards undertaking Shipbuilding and Ship Repair Industry activities in Malaysia. Among them, 31 shipyards are located in Peninsular Malaysia and 68 shipyards are located in the states of Sabah and Sarawak. The largest shipbuilding company in Malaysia is Malaysia Marine and Heavy Engineering (MMHE), a state-owned enterprise. MMHE belongs to Petronas Group, a Malaysian oil and gas company owned by the Government of Malaysia. As of 2021, the total yard size is 2,005,540 m^2; the revenue was RM 13.1 million and the labour force amounted to 2,649 employees[11].

Over the past twelve years, production of seagoing vessels in Malaysia and new orders to Malaysian shipyards have been steadily declining in terms of CGT (Figure 17). Compared to 2011, completions decreased by 75% and new orders decreased by 96% in 2022

Figure 17. Completions and new contracts of seagoing vessels by Malaysian shipyards, 2011-2022



Note: This Figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Tugs, offshore vessels and dry cargo vessels are the main ship types produced in Malaysia over the last twelve years. Of these, tugs ranked the first, accounting for 54% of total CGT

delivered in Malaysia between 2011 and 2022. Malaysia is the third largest tugs shipbuilder worldwide after Indonesia and China (Table 23).

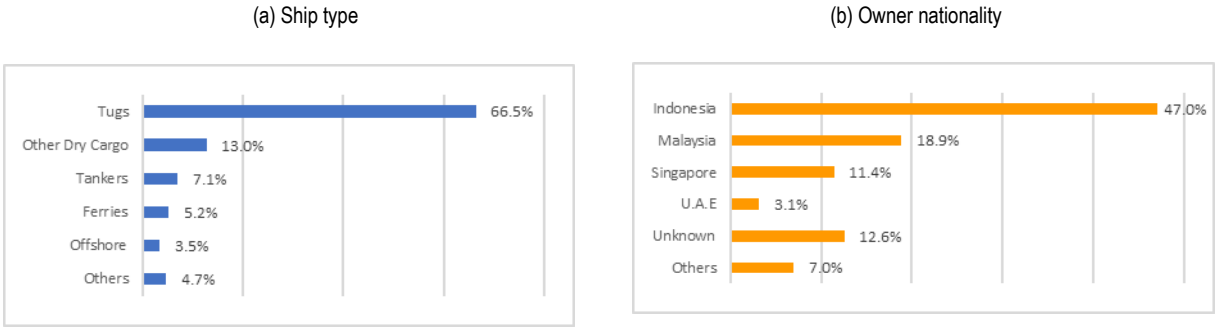
Table 23. Completions of seagoing vessels by ship type in Malaysia, 2011-2022

Type	CGT('000)	% of total
Tug	1191	53.5%
Offshore	518	23.3%
Other Dry Cargo	257	11.5%
Passenger	68	3.0%
Tankers	60	2.7%
Bulk carrier	38	1.7%
Dredger	32	1.4%
Ro-Ro	11	0.5%
Others	50	2.3%
Total	2224	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Recent orders to Malaysian shipyards were concentrated in tugs, accounting for about 67% of total CGT contracted between 2018 and 2022. About 77% of recent orders were from Indonesia, Malaysia and Singapore ship owners.

Figure 18. New contracts in Malaysian shipyards by ship types and by ship owner nationalities, 2018-2022, in term of CGT



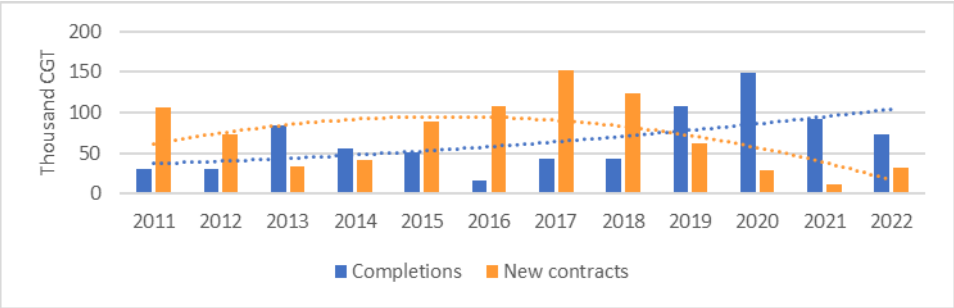
Note: This Figure includes all seagoing vessels from 100 GT. The percent share is based on CGT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.9. Bangladesh

The two largest shipbuilders in Bangladesh are Western Marine Shipyard (WMS) and Ananda Shipyard and Shipways Limited (ASSL), both being state-owned and producing various types of vessels. The yard of Western Marine Shipyard stands over 42 acres of land, and the production area of ASSL is 80,000 square meters[12].

Over the past twelve years, completions of seagoing vessels in Bangladesh and new orders to Bangladeshi shipyards have fluctuated significantly (Figure 19). Completions in Bangladesh have been growing between 2016 and 2020, although they decreased by 51% in 2022. New contracts of seagoing vessels in Bangladesh have been declining since 2017, however, in 2022, they increased 2.7 times compared to 2021.

Figure 19. Completions and new contracts of seagoing vessels by Bangladeshi shipyards, 2011-2022



Note: This figure includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

The Bangladeshi shipyards have been producing a variety of vessel types over the last twelve years including dry cargo vessels, tankers, gas carriers, dredgers and passenger ships. Of these, dry cargo vessels and tankers are the main ship types, accounting for 89% of total CGT delivered in Bangladesh between 2011 and 2022.

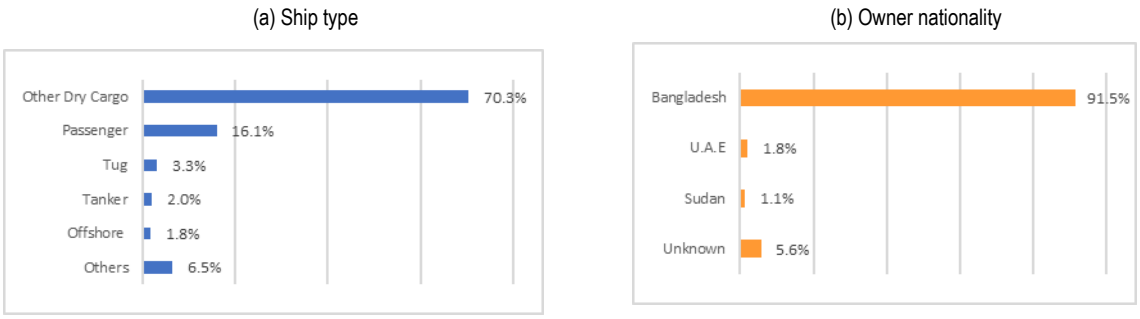
Table 24. Completions of seagoing vessels by ship type in Bangladesh, 2011-2022

Type	CGT('000)	% of total
Other Dry Cargo	443	56.9%
Tankers	249	32.0%
Gas carrier	43	5.6%
Dredgers	18	2.3%
Ferries	8	1.0%
FCC	7	0.9%
Others	10	1.3%
Total	778	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

Recent orders to Bangladeshi shipyards were concentrated in dry cargo vessels, accounting for about 70% of total CGT contracted between 2018 and 2022. About 92% of recent orders were by domestic ship owners.

Figure 20. New contracts in Bangladeshi shipyards by ship types and by ship owner nationalities, 2018-2022, in term of CGT



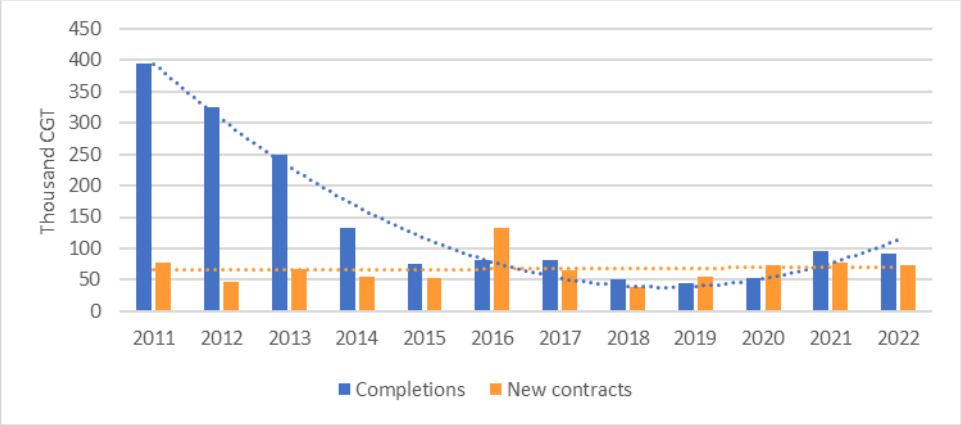
Note: This figure includes all seagoing vessels from 100 GT. The percent share is based on CGT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

2.2.10. India

India currently has 28 shipyards, 6 in the Central Public Sector, 2 owned by State governments, and 20 in the private sector[13]. As of March 2021, according to the Ministry of Ports, Shipping and Waterways, amongst public sector companies, Cochin Shipyard Ltd. (CSL) has the largest ship building capacity (110 thousand DWT) followed by Hindustan Shipyard Ltd. (HSL) (80 thousand DWT). CSL is under the administrative control of the Ministry of Shipping and HSL is under the control of Ministry of Defense. Amongst the reporting private companies, Shoft Shipyard Pvt. Ltd. has the largest ship building capacity (9 thousand DWT).[14]

Over the past twelve years, completions of seagoing vessels in India and new orders to Indian shipyards have fluctuated significantly (Figure 21). In 2020, under the impact of COVID-19 pandemic, the completions decreased by 71% in terms of CGT compared to 2019, and new orders decreased by 40%. Completions increased slightly in 2021 compared to 2020, but the new orders decreased continually.

Figure 21. Completions and new contracts of seagoing vessels by Indian shipyards, 2011-2022



Note: This Figure includes all seagoing vessels from 100 GT. Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

The main ship types produced in India over the last twelve years were dry cargo vessels, offshore vessels, bulk carriers and passenger ships. Those four types accounted for 92% of total CGT delivered in India between 2011 and 2022.

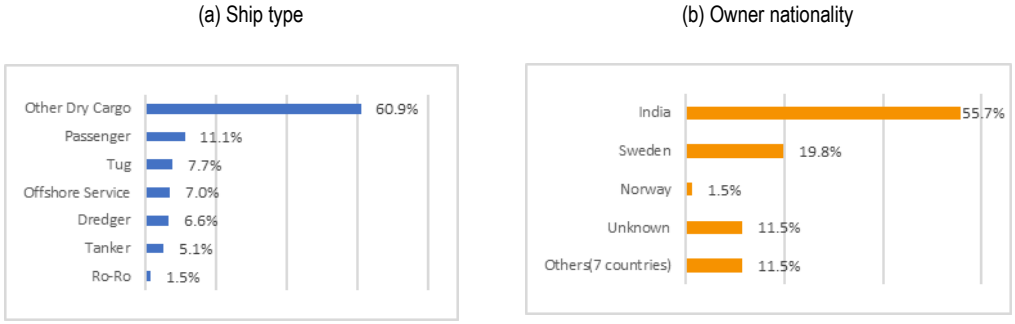
Table 25. Completions of seagoing vessels by ship type in India, 2011-2022

Type	CGT('000)	% of total
Other Dry Cargo	676	40.5%
Offshore Service	395	23.7%
Bulk Carrier	269	16.1%
Passenger	189	11.3%
Tanker	56	3.4%
Tug	50	3.0%
FCC (Fully Cellular Container)	5	0.3%
Others	28	1.7%
Total	1668	100.0%

Note: This table includes all seagoing vessels from 100 GT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr

Recent orders to Indian shipyards were concentrated in dry cargo ships and passenger ships, accounting for about 72% of total CGT contracted between 2018 and 2022. About 56% of recent orders were from domestic owners.

Figure 22. New contracts in Indian shipyards by ship types and by ship owner nationalities, 2018-2022, in term of CGT



Note: This Figure includes all seagoing vessels from 100 GT. The percent share is based on CGT.
Source: OECD calculations based on Clarkson Research Services Limited (January 2023), World Fleet Register, https://www.clarksons.net/wfr.

3. Policy developments in selected non-WP6 economies

3.1. Criteria for including support measures in the report

In preparing the list of support measures, the Secretariat used the following criteria:

- The categories of support measures are the same as in the WP6 Inventory exercise [C/WP6(2022)18] (see categories in the table below);

Table 26. Types of support measures covered in the WP6 Inventory

Type	Description
A	Direct transfer of funds by Governments
B	Indirect transfer of funds by Governments
C	Loans on terms and conditions more favourable than those commercially available
D	Loan guarantees that support loans on terms and conditions more favourable than those commercially available
E	Export or Home Credits
F	Governments taking over, or otherwise absolving the industry from debts
G	Government acquisition of interest in a yard or yards
H	Government revenue that is foregone or not collected
I	Provision by government of infrastructure (other than general infrastructure), goods or services on non-commercial conditions
J	The purchase of goods or services from the industry by government at above market rates
K	Support for Research and Development
L	Any form of income or price support
M	Protection of the domestic market
N	Domestic build or domestic content requirements
O	Other official regulations and practices

Source: WP6 Inventory questionnaire. [C/WP6(2022)18].

- Information on support measures is derived from public sources only. This most likely means that not all measures are reported in this document;
- The focus is on support measures that came into force from April 2022 to April 2023;
    - In case no information is found on the actual date at which the support measures were taken, the Secretariat included support measures that are likely to be taken in the considered time period;
    - In case it is expected that certain support measures are terminated, the Secretariat did not include these support measures in this report;
- In case no information is found on the amount of support provided or the authority/agency responsible for the support measures, the relevant fields are left blank;
- The Secretariat made efforts to include selected barriers to trade that may affect the shipbuilding sector (e.g. measures which could lead to the protection of the domestic market) either directly or indirectly, but did not include general and horizontal trade barriers (e.g. foreign direct investment limitations and customs procedures);

- Strategies, objectives or plans for the domestic shipbuilding industry without concrete measures are not included in this report;
- The Secretariat has contacted economies for which support measures have been included in this report and requested comments to the extent possible. The Secretariat is waiting for possible comments, which could be addressed in a revised version of this report.

3.2. Measures by categories and economies

3.2.1. Summary

The report lists support measures taken by selected non-WP6 economies. The Secretariat found 28 measures in this report (see Table 27 below) compared to 22 last year. Research of support measures is difficult given the lack of official information in most economies. The Secretariat needs to rely on indirect sources, often press articles. This means that there is a high risk that many support measures taken by non-WP6 economies are not mentioned in this Document given the fact that information on them is not publicly available or has not been found by the Secretariat.

Within the research period, 28 support measures are found in 9 economies. China used the largest number of support measures (9), followed by the United States (6) as was the case last year. Looking at previous editions of the Inventory of support measures taken by non-WP6 members, it seems that economies can use all types of support measures depending on their needs however, about half of the total support measures are reported in three categories which are the category A (Direct transfer of funds by Governments), the category H (Government revenue that is foregone or not collected) and the category M (Protection of the domestic market).

In terms of categories, the most frequent types of support measures (each used six times), are Direct transfer of funds by Governments (Category A) and Protection of the domestic market (category M) which is similar to the number of measures found in the previous report. They are followed by four support measures found for the category H (Government revenue that is foregone or not collected) and the category O (Other official regulations and practices. All these measures can be very distorting for the international shipbuilding markets.

Table 27. Number of support measures reported in the WP6 Inventory of non-WP6 members*

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	**Total**
Argentina					1											**1**
Bangladesh	1		1													**2**
Canada	1															**1**
China									1		1		4		3	**9**
India	2												1	1		**4**
New Zealand												2				**2**
Philippines								2								**2**
United Kingdom															1	**1**
United States	2			1				2					1			**6**
Total	6		1	1	1			4	1		1	2	6	1	4	**28**

* In alphabetical order
Source: OECD calculations

3.2.2. Measures by categories

Category A (Direct transfer of funds by Governments) includes six support measures. They aim to directly protect or improve the economic health of the domestic shipbuilding industry.

- Ministry of Industries announced, "Shipbuilding Industry Development Policy 2021" (Bangladesh)
- Davie Shipbuilding has become the third strategic partner in the country's National Shipbuilding Strategy (NSS) (Canada)
- New approvals of financial assistance supported by the Shipbuilding Financial Assistance Policy (SBFA) (India)
- CCEA has approved extension of timeline and budgetary support INR 1.53 billion for total (India)
- Small Shipyard Grants (United States)
- Inflation Reduction Act (IRA) of 2022 (United States)

Category C (Loans on terms and conditions more favourable than those commercially available) includes one support measure.

- Bangladesh Bank has formed a BDT 20 billion refinance scheme to support the shipbuilding sector (Bangladesh)

Category D (Loan guarantees that support loans on terms and conditions more favourable than those commercially available) includes one support measure.

- The Federal Ship Financing Program (Title XI) promotes U.S. Merchant Marine fleet and U.S. shipyard growth and modernization. (United States)

Category E (Export or Home Credits) includes one support measure.

- The government of Argentina launched a line of financing as an amount of $10 billion (Argentina)

Category H (Government revenue that is foregone or not collected) includes four support measures.

- FIRB approved the tax incentives for the operations of a proposed PHP 1.5 billion Cebu City-based shipping vessel (Philippines)
- FIRB provided special corporate income tax and exempted import duties and VAT (Philippines)
- Construction Reserve Fund (United States)
- Capital Construction Fund (United States)

Category I (Provision by government of infrastructure (other than general infrastructure), goods or services on non-commercial conditions) includes one support measure.

- Expansion plan of the pilot Free Trade Zone (FTZ) Ningbo into a global shipping hub, an influential oil and gas resource allocation centre, a supply chain innovation centre and a high-quality smart manufacturing demonstration area (China)

Category K (Support for Research and Development) includes one support measure.

- Strategic cooperation between China's Maritime Safety Administration and CSSC focusing on sectors of smart ships and maritime environmental protection (China)

Category L (Any form of income or price support) includes two support measures.

- The New Zealand Customs Service granted general import tariff concessions on the importation of certain goods (New Zealand)
- The New Zealand Customs Service granted general import tariff concessions on the importation of spare and service parts of the vessel Takutai Chief (New Zealand)

Category M (Protection of the domestic market) and ***N*** (Domestic build or domestic content requirements) share many common points. They aim to increase or protect the domestic shipbuilding industry. There are seven support measures included in these two categories.

- Possible order for six LNG carriers for China National Offshore Oil Corporation (CNOOC) (China)
- China Development Bank Financial Leasing (CDB Leasing) has a total of 42 ships on order (China)
- COSCO and CNPC ordered 3 liquefied natural gas carriers at domestic shipyards (China)
- OOCL ordered 7 containerships at domestic shipyards (China)
- INR 1 billion allocated for financial assistance policy for shipbuilding (India)
- Make in India Order (India)
- Executive order on public procurement to maximize the use of goods produced in, and services offered in, the U.S. – Update (United States)

Category O (Other official regulations and practices) includes four measures.

- Legal guidelines limiting liabilities of shipyards and shipping companies (China)
- Framework cooperation between Guandong province government, CSSC and CNOOC aimed at reducing emission from the shipping industry (China)
- Decarbonisation deal between China Classification Society (CCS) and China COSCO Shipping Group (China)
- UK Government to invest GBP 4 billion in refreshed National Shipbuilding Strategy (United Kingdom)

3.1. Measures taken by selected non-WP6 economies

3.1.1. Argentina

1. Type of the measure of support and its title	
E Export or Home Credits *Financing line of USD 10 billion by the government of Argentina*	
2. Authority/agency responsible for the measure and legal authority	
The Ministry of Productive Development, together with the National Bank	
3. Outline/explanation of the measure	
In October 2021, the government of Argentina announced the establishment of a new credit line to support the shipping sector. The Ministry of Productive Development, together with the Banco de la Nacion Argentina, launched a new line of financing for the acquisition or construction of new ships and naval artifacts built in shipyards located in the national territory. With an initial amount of USD10 billion in financing available, the line for the naval sector provides financial predictability to national vessels, also strengthening the enormous potential of the Argentina naval industry. The loans will have a term of 120 months and with the possibility of obtaining up to 24 months of grace period applied to the capital in the case of construction.	
4. Estimated value	USD 10 billion
5. Start and end date	Announced on 19 October, 2021
6. References	
Global Trade Alert (2021): "Argentina: New long-term credit line in favour of the shipping sector", https://www.globaltradealert.org/state-act/61221/argentina-new-long-term-credit-line-in-favour-of-the-shipping-sector , accessed on 31 March 2023 Official website of the Argentina State (2021): "$10 billion to finance the purchase and construction of ships in the country", https://www.argentina.gob.ar/noticias/10000-millones-para-financiar-la-compra-y-construccion-de-buques-en-el-pais , accessed on 31 March 2023	

3.1.2. Bangladesh

1. Type of the measure of support and its title	
C Loans on terms and conditions more favorable than those commercially available *Bangladesh Bank has formed a BDT 20 billion refinance scheme to support the shipbuilding sector.*	
2. Authority/agency responsible for the measure and legal authority	
Bangladesh Bank	
3. Outline/explanation of the measure	
Bangladesh Bank has formed a BDT 20 billion about USD 250 million refinance scheme to support the shipbuilding sector which become prey of the COVID-19 pandemic-linked global economic slowdown. Under the scheme, the ship builders will get loans at 4.5%, the highest rate of interest for 12 years period with three years grace period. The scheme is taken under the 'Shipbuilding Industry Development Policy 2021' to help recoup the promising sector which first exported an ocean-going vessel to a Danish company back in 2008. Amid repeated calls from the shipbuilders, the government now came forward to help the sector and set a target to fetch USD 4 billion through ship exports by 2025. The government also plans to lower taxes to support the shipbuilding industry.	
4. Estimated value	BDT 20 billion (USD 250 million)
5. Start and end date	Applications will be accepted under the scheme until 30 June 2024.
6. References	
Newspaper Container News (2022): " Bangladesh forms USD 250 million refinance scheme for shipbuilding industry", https://container-news.com/bangladesh-forms-us250-million-refinance-scheme-for-shipbuilding-industry/ , accessed on 29 March 2023 Global Trade Alert (2022): " Bangladesh: Refinance scheme for the shipbuilding industry", https://www.globaltradealert.org/intervention/104158/state-loan/bangladesh-refinance-scheme-for-the-shipbuilding-industry , accessed on 29 March 2023 Newspaper The Daily Star (2022): "Tk 2,000cr refinance scheme for shipbuilding", https://www.thedailystar.net/business/economy/news/tk-2000cr-refinance-scheme-shipbuilding-3032896 , accessed on 31 March 2023	

1. Type of the measure of support and its title	
A Direct transfer of funds by Governments *Ministry of Industries announced "Shipbuilding Industry Development Policy 2021"*	
2. Authority/agency responsible for the measure and legal authority	
Ministry of Industries	
3. Outline/explanation of the measure	
Ministry of Industries, government of the People's Republic of Bangladesh, announced "Shipbuilding Industry Development Policy 2021" which contains 13 projects to accelerate industrialization for private sector in order to accomplish economic growth. The following action plan will be adopted through united participation of the public and private sectors: 1. Various shipbuilding materials including ships 2. Engineering and logistics support to the mega development projects 3. Investment facilities/incentives for export oriented and local shipbuilding industries 4. Duty reforms on imported raw materials/machinery/equipment 5. Linkage Industries/Sub-sectors 6. Identifying appropriate areas 7. Ultra-modern and Modernization	
4. Estimated value	
5. Start and end date	Start date: 2021; End date: 2026
6. References	
Ministry of Industries: "Shipbuilding Industry Development Policy 2021", https://moind.portal.gov.bd/sites/default/files/files/moind.portal.gov.bd/page/66b4934c_1ad2_4ab3_a9f8_329331d9b054/12.%20Ship%20building%20Industry%20Development%20Policy%202021.pdf , accessed on 10 April 2023	

3.1.3. Canada

1. Type of the measure of support and its title	
A Direct transfer of funds by Governments *Davie Shipbuilding has become the third strategic partner in the country's National Shipbuilding Strategy (NSS)*	
2. Authority/agency responsible for the measure and legal authority	
Canadian government	
3. Outline/explanation of the measure	
Davie Shipbuilding has become the third strategic partner in the country's National Shipbuilding Strategy (NSS). This agreement between the company and the federal government marks the start of negotiations for contracts to support Canada's future shipbuilding needs and create good jobs. This will include the construction of six program icebreakers and one polar icebreaker for the Canadian Coast Guard. Canada's National Shipbuilding Strategy (NSS) is a long-term, multi-billion-dollar initiative launched by the Canadian government in 2011 to renew and modernize the country's naval and coast guard fleets, as well as to revitalize the domestic shipbuilding industry. The strategy is structured around non-combatant (including icebreakers, offshore science vessels, and support ships) and combatant vessels (such as frigates and Arctic offshore patrol ships). Since 2012, the Canadian Government has awarded more than $21 billion in shipbuilding-related contracts.	
4. Estimated value	
5. Start and end date	Announced on 4 April, 2023
6. References	
Prime Minister of Canada(2023): "Renewing Canada's fleets and supporting good middle-class jobs in Quebec", Renewing Canada's fleets and supporting good middle-class jobs in Quebec | Prime Minister of Canada (pm.gc.ca) , accessed on 16 May 2023	

3.1.4. China

1. Type of the measure of support and its title	
M Protection of the domestic market *Possible order for six LNG carriers for China National Offshore Oil Corporation (CNOOC)*	
2. Authority/agency responsible for the measure and legal authority	
Not applicable	
3. Outline/explanation of the measure	
China is looking for ways to boosts its building capacity for LNG carriers and there are two shipbuilders in China that are set to do this. It is expected that the contracts will be signed soon, and the ships delivered in 2025 and 2026. In June 2021, two Chinese LNG giants ordered jointly three LNG carrier newbuildings for USD 620 million with the aim to charter to CNOOC. These LNG carriers are expected in 2024 and 2025.	
4. Estimated value	unknown
5. Start and end date	Start date: 2022; End date: 2026
6. References	
Newspaper Trade Winds (2022): "Chinese yards to snare more domestic LNG carrier orders", https://www.tradewindsnews.com/gas/chinese-yards-to-snare-more-domestic-lng-carrier-orders/2-1-1180391, accessed on 22 March 2022 Newspaper Trade Winds (2021): "Chinese LNG giants order newbuilding trio for CNOOC", https://www.tradewindsnews.com/gas/chinese-lng-giants-order-newbuilding-trio-for-cnooc/2-1-1028121, accessed on 23 March 2022	

1. Type of the measure of support and its title	
K Support for research and development *Strategic cooperation between China's Maritime Safety Administration and CSSC*	
2. Authority/agency responsible for the measure and legal authority	
Maritime Safety Administration of the Ministry of Transport	
3. Outline/explanation of the measure	
China's Maritime Safety Administration signed a strategic cooperation with China State Shipbuilding Corporation (CSSC) focusing on sectors of smart ships and maritime environmental protection. Under this agreement, cooperation is foreseen on the development of smart ships, a smart transport management system, smart inspection, and monitoring systems, as well as a development plan for the smart shipping industry. Further aspects of the collaboration include research and development of new energy-powered ships and energy saving and environmental protection devices.	
4. Estimated value	
5. Start and end date	Agreement on 15th of July, 2020
6. References	
Newspaper Hellenic Shipping News (2020): "China to promote smart ships development, maritime environmental protection", https://www.hellenicshippingnews.com/china-to-promote-smart-ship-development-maritime-environmental-protection/, accessed on 16 March 2021. Newspaper Offshore Energy (2020): "Chinese government teams up with CSSC on smart ships", https://www.offshore-energy.biz/chinese-government-teams-up-with-cssc-on-smart-ships/, accessed on 16 March 2021. Newspaper The Maritime Executive (2020): "Chinese Government and CSSC Cooperate to Develop Shipping Technologies", https://www.maritime-executive.com/article/chinese-government-and-cssc-cooperate-to-develop-shipping-technologies, accessed on 16 March 2021. State-owned Assets Supervision and Administration Commission of the State Council (2020): "CSSC, China MSA Join Hands in Building China's Strength in Transportation, Maritime", http://en.sasac.gov.cn/2020/07/21/c_12149.htm, accessed on 3 April 2023.	

1. Type of the measure of support and its title	
O Other official regulations and practice *Legal Guidelines limiting liabilities of shipyards and shipping companies*	
2. Authority/agency responsible for the measure and legal authority	
Supreme People's Court of China	
3. Outline/explanation of the measure	
The Supreme People's Court of China has issued legal guidelines that limit the liabilities of shipyards and shipping companies affected by the COVID-19 pandemic. According to the supreme court's instruction, carriers and shippers can terminate the transport contracts if vessels cannot arrive at loading or discharge ports due to the pandemic. Furthermore, carriers can be exempted from the liabilities for delayed deliveries that result from COVID-19 if they inform the shippers in time. Shipbuilders and repair yards can delay their deliveries due to a shortage of workers or equipment, but lower courts need to take individual situations into consideration. While English law applies to most shipbuilding and international shipping contracts, the supreme court's instruction is expected to affect legal cases governed by Chinese law.	
4. Estimated value	
5. Start and end date	Start date: 2020; End date: unknown
6. References	
Newspaper Trade Winds (2020): "China's top court limits coronavirus liabilities for shipping firms and yards", https://www.tradewindsnews.com/law/chinas-top-court-limits-coronavirus-liabilities-for-shipping-firms-and-yards/2-1-829834, accessed on 16 March 2021.	

1. Type of the measure of support and its title	
M Protection of the domestic market *China Development Bank Financial Leasing (CDB Leasing) has a total of 42 ships on order*	
2. Authority/agency responsible for the measure and legal authority	
Not applicable	
3. Outline/explanation of the measure	
China Development Bank Financial Leasing has in January 2022 the equivalent to 6% of the current orderbook by Chinese shipowners.	
4. Estimated value	
5. Start and end date	Start date: 2022; End date: unknown
6. References	
Newspaper Trade Winds (2022): "CDB Leasing tops newbuilding league table for Chinese owners", https://www.tradewindsnews.com/shipyards/cdb-leasing-tops-newbuilding-league-table-for-chinese-owners/2-1-1165359, accessed on 22 March 2022.	

1. Type of the measure of support and its title	
O Other official regulations and practice *Strategic Cooperation between Guandong Province Government, CSSC and CNOOC – Update*	
2. Authority/agency responsible for the measure and legal authority	
Guandong province government	
3. Outline/explanation of the measure	
Guandong province government has signed a framework cooperation with China State Shipbuilding Corporation (CSSC) and China National Offshore Oil Corporation (CNOOC), which is aimed at reducing the emission from the shipping industry. Under the project, the plan is to retrofit approximately 1,500 ships and build 19 LNG fuelling stations in the province by 2025. The project, upon completion, will replace the annual consumption of 390 000 tonnes of fuel products with demand for 400 000 tonnes of LNG. **Update:** Before the end of 2021, China's Guangdong province plans to begin the construction of six LNG bunkering stations for inland river waterways. Moreover, by 2022 complete the construction of additional eight LNG bunkering stations for the main navigation channels on arterial waterways – including two coastal stations. This was announced November 9, 2021 by the Guangdong Development and Reform Commission.	
4. Estimated value	
5. Start and end date	Start date: 2020; End date: 2025
6. References	
Newspaper Lloyd's List (2020): "Guandong to convert 1,500 ships to LNG", https://lloydslist.maritimeintelligence.informa.com/LL1132522/Guangdong-to-convert-1500-ships-to-LNG, accessed on 18 March 2021. Newspaper Offshore Energy (2020): "China's Guangdong plans big inland LNG conversion project", https://www.offshore-energy.biz/chinas-guangdong-plans-big-inland-lng-conversion-project/, accessed on 18 March 2021. Newspaper S&P Global (2021): "China's Guangdong to build LNG bunkering stations in inland waterways", https://www.spglobal.com/commodity-insights/en/market-insights/latest-news/lng/111021-chinas-guangdong-to-build-lng-bunkering-stations-in-inland-waterways, accessed on 23 March 2022.	

1. Type of the measure of support and its title	
M Protection of the domestic market *3 liquefied natural gas carriers orders by Cosco and CNPC – Update*	
2. Authority/agency responsible for the measure and legal authority	
Not applicable	
3. Outline/explanation of the measure	
A joint venture consisting of Chinese shipowner COSCO and China National Petroleum Corporation (CNPC) has placed an order for three liquefied natural gas carriers at Hudong Zhonghua Shipbuilding. The price for each of the 174,000 cubic meter LNG carriers is USD 185 million. The vessels will be used by CNPC's Hong Kong (China)-listed unit PetroChina. **Update:** A similar order has been placed and agreed from PetroChina in June 2021 of three more liquified natural gas carriers from Hudong Zhonghua Shipbuilding. It is mentioned that this co-operation contributes to China hitting its decarbonisation targets as well as securing China's energy supply. December, 2021: COSCO orders three LNG carriers for USD 554 million at Hudong Zhonghua Shipbuilding, these will also be chartered by PetroChina. The delivery of these carriers is scheduled between October 2023 and April 2024.	
4. Estimated value	USD 600 million; USD 554 million
5. Start and end date	Start date: 2020; End date: 2024
6. References	
Newspaper Offshore Energy (2020): "Cosco, CNPC to order LNG carrier at Hudong", https://www.offshore-energy.biz/cosco-cnpc-to-order-lng-carrier-trio-at-hudong/, accessed on 18 March 2021. Newspaper Offshore Energy (2020): "China COSCO Shipping orders LNG tro at Hudong", https://www.offshore-energy.biz/china-cosco-shipping-orders-lng-trio-at-hudong/, accessed on 18 March 2021. Newspaper Lloyd's List (2020): "Cosco's LNG tanker investment linked to US export projects", https://lloydslist.maritimeintelligence.informa.com/LL1132095/Coscos-LNG-tanker-investment-linked-to-US-export-projects, accessed on 18 March 2021. Newspaper Lloyd's List (2021): "PetroChina to order trio of LNG carreirs at Hudong-Zhongua", https://lloydslist.maritimeintelligence.informa.com/LL1137250/PetroChina-to-order-trio-of-LNG-carriers-at-Hudong-Zhonghua, accessed on 23 March 2022. Newspaper Lloyd's List (2021): "Cosco adds three LNG carriers to orderbook", https://lloydslist.maritimeintelligence.informa.com/LL1139196/Cosco-adds-three-LNG-carriers-to-orderbook, accessed on 23 March 2022.	

1. Type of the measure of support and its title	
M Protection of the domestic market *7 containership orders by OOCL – Update*	
2. Authority/agency responsible for the measure and legal authority	
Not applicable	
3. Outline/explanation of the measure	
Orient Overseas Container Line Limited (OOCL) has ordered seven 23,000-teu containership newbuildings at two Chinese shipyards. Contracts have been signed with Dalian COSCO KHI Ship Engineering Corporation (Dacks), which will build four vessels costing USD 157.71 million each, and Nantong COSCO KHI Ship Engineering Corporation (Nacks), which will construct three ships costing USD 157.68 million each. They are expected for delivery between the third quarter of 2023 and the third quarter of 2024. The latest seven orders bring the number of 23,000-teu containerships ordered by OOCL in 2020, with total capital expenditure amounting to more than USD 1.88 billion. **Update:** OOCL has ordered ten eco-friendly 26,000 TEU containerships in September 2021; the newbuildings are worth close to USD 1,575.80 million.	
4. Estimated value	USD 677.88 million
5. Start and end date	Start date: 2020; End date: 2024
6. References	
Newspaper Trade Winds (2020): "OOCL ups mega-size containership tally by seven with new order worth $1.1bn", https://www.tradewindsnews.com/containerships/oocl-ups-mega-size-containership-tally-by-seven-with-new-order-worth-1-1bn/2-1-904326, accessed on 18 March 2021. Newspaper Offshore Energy (2020): "OOCL orders 7 more 23,000 TEU boxships in China", https://www.offshore-energy.biz/oocl-orders-7-more-23000-teu-boxships-in-china/, accessed on 18 March 2021. Newspaper Offshore Energy (2021): "OOCL orders ten eco-friendly 16,000 TEU boxships", https://www.offshore-energy.biz/oocl-orders-ten-16000-teu-boxships-in-china/, accessed on 23 March 2022. Newspaper Trade Winds (2021): "OOCL strikes $1.6bn deal for 10 neo-panamax containerships", https://www.tradewindsnews.com/containerships/oocl-strikes-1-6bn-deal-for-10-neo-panamax-containerships/2-1-1061762, accessed on 23 March 2022.	

1. Type of the measure of support and its title	
O Other official regulations and practices *Decarbonisation deal between China Classification Society (CCS) and China COSCO Shipping Group*	
2. Authority/agency responsible for the measure and legal authority	
Not applicable	
3. Outline/explanation of the measure	
The China Classification Society (CCS) and COSCO Shipping group signed a framework agreement where the aim is to find solutions to reduce greenhouse gas (GHG) emissions in the maritime sector. This is a direct action to assist China's "carbon peak, carbon neutral" development target and both organisations will pool resources to support this. The main commitments of this agreement will be to work together on the development of key core technologies, promoting the establishment of industry standards and build an international cooperation platform.	
4. Estimated value	
5. Start and end date	Start date: 2021; End date: unknown
6. References	
Newspaper Trade Winds (2021): "Cosco Shipping Group signs decarbonisation deal with CCS", https://www.tradewindsnews.com/technology/cosco-shipping-group-signs-decarbonisation-deal-with-ccs/2-1-1028503, accessed on 23 March 2022. Newspaper Offshore Energy (2021): "CCS, COSCO team up to support maritime decarbonization", https://www.offshore-energy.biz/ccs-cosco-team-up-to-support-maritime-decarbonization/, accessed on 23 March 2022. Newspaper Hellenic Shipping News (2021): "China Classification Society and COSCO Shipping Group sign new agreement to support maritime decarbonisation", https://www.hellenicshippingnews.com/china-classification-society-and-cosco-shipping-group-sign-new-agreement-to-support-maritime-decarbonisation/, accessed on 23 March 2022.	

1. Type of the measure of support and its title	
I Provision by government of infrastructure (other than general infrastructure), goods or services on non-commercial conditions *Expansion of pilot FTZ Ningbo*	
2. Authority/agency responsible for the measure and legal authority	
State Council of the People's Republic of China	
3. Outline/explanation of the measure	
In September 2020, the Council of the People's Republic of China released plans for the establishment of new and the expansion of existing Free Trade Zones (FTZs). According to the plan, Ningbo will be allowed to expand its pilot FTZ. The provincial government has made specific plans to build the zone into a global shipping hub, an influential oil and gas resource allocation centre, a supply chain innovation centre and a high-quality smart manufacturing demonstration area. With a focus on shipping, Ningbo-Zhoushan Port will strengthen the linkage of the sea port, the airport, the inland port and the information port, improve the port's intelligent infrastructure construction, and make efforts to develop high-end shipping services including finance and insurance, international marine affairs, and shipping trade and transactions. It will also build the high energy-level shipping service platforms and construct the globally first-class port with strong radiation and service functions as well as the important hub of the national comprehensive transportation system. The expansion area in Ningbo will be located in Beilun District, which is home of five-state level development zones.	
4. Estimated value	
5. Start and end date	Start date: 2020; End date: unknown
6. References	
The State Council of the People's Republic of China (2020): "Free trade zones rise to 21 with new approvals", http://english.www.gov.cn/policies/policywatch/202009/22/content_WS5f693628c6d0f7257693c63a.html, accessed on 17 March 2021. Newspaper Hellenic Shipping News (2020): "Ningbo to build expansion area for Zhejiang Pilot Free Trade Zone", https://www.hellenicshippingnews.com/ningbo-to-build-expansion-area-for-zhejiang-pilot-free-trade-zone/, accessed on 17 March 2021.	

3.1.5. India

1. Type of the measure of support and its title	
A Direct transfer of funds by Governments *New approvals of financial assistance supported by the Shipbuilding Financial Assistance Policy (SBFA)*	
2. Authority/agency responsible for the measure and legal authority	
The government of India, Ministry of Ports, Shipping and Waterways	
3. Outline/explanation of the measure	
The Indian Government has sanctioned financial assistance of USD 20.13 million (INR 1.55 billion) for 47 ships under the Shipbuilding Financial Assistance Policy (SBFA). The combined contract value of these vessels stands at USD 110.39 million (INR 8.5 billion). Financial assistance will be granted to Indian Shipyards equal to 20% of the lower of "Contract Price" or the "Fair Price" or actual payments received of each vessel built by them for a period of at least 10 years commencing 2016-17. This rate of 20% will be reduced by 3% every three years. An official was quoted by Economic Times as saying: "The focus of the policy is to make domestically produced ships competitive with Chinese ones. Till date, we have not rejected any request for financial assistance under the policy.	
4. Estimated value	INR 1.55 billion (USD 20.13 million)
5. Start and end date	Start date: 01 April 2016; End date: 31 March 2026
6. References	
Newspaper Ship technology (2022): "Indian Government approves financial assistance for building 47 vessels", https://www.ship-technology.com/news/india-financial-assistance-vessels/ , accessed on 24 March 2023 Newspaper The Economic Times (2022): "Centre okays Rs 155 crore for building 47 ships", https://economictimes.indiatimes.com/industry/transportation/shipping-/-transport/centre-okays-rs-155-crore-for-building-47-ships/articleshow/90037808.cms , accessed on 24 March 2023 Government of India Ministry of Ports, Shipping and Waterways Transport Research Wing (2022): "STATISTICS OF INDIA'S SHIP BUILDING AND SHIP REPAIRING INDUSTRY 2020-21", https://shipmin.gov.in/content/statistics-indias-ship-building-and-ship-repairing-industry-2020-21 , accessed on 24 March 2023 Ministry of Ports, Shipping and Waterways (2018): "Financial Assistance Policy Shipyards", https://pib.gov.in/Pressreleaseshare.aspx?PRID=1523349, accessed on 22 March 2022.	

1. Type of the measure of support and its title	
M Protection of the domestic market *INR 1 billion allocated for financial assistance policy for shipbuilding*	
2. Authority/agency responsible for the measure and legal authority	
Ministry of Ports, Shipping and Waterways	
3. Outline/explanation of the measure	
Ministry of Ports, Shipping and Waterways has released an amount of financial assistance on shipbuilding of INR 261 million in FY 2019-20 and about INR 580 million in 2020-21. Update: Allocation under R.E. 2021-22 was INR 1 billion for financial assistance policy for shipbuilding. Out of INR 1 billion, an amount of subsidy of INR 350 million has been released under settlement of subsidy claims under the shipbuilding subsidy scheme, 2002-2007. Further, an amount of subsidy of INR 350 million has been released under financial assistance policy (2016-26). Bills of INR 300 million have been sent by DG (S) to PAO for release of subsidy which will be released shortly.	
4. Estimated value	INR 1 billion
5. Start and end date	Start date: 2021; End date: unknown
6. References	
Government of India Ministry of Ports, Shipping and Waterways Transport Research Wing (2022): "Statistics of India's Ship Building and Ship Reparing Industry 2020-201STATISTICS OF INDIA'S SHIP", https://shipmin.gov.in/content/statistics-indias-ship-building-and-ship-repairing-industry-2020-21 , accessed on 24 March 2023 Department-Related Parliamentary Standing Committee on Transport, Tourism and Culture (2022): "Action Taken by the Government on the Recommendations/Observations of the Committee contained in its Three Hundred Sixteenth Report on Demands for Grants (2022-23) of Ministry of Ports, Shipping and Waterways", https://rajyasabha.nic.in/rsnew/Committee_site/Committee_File/ReportFile/20/173/335_2022_12_12.pdf, accessed on 4 April 2023	

1. Type of the measure of support and its title	
A Direct transfer of funds by Governments *CCEA has approved extension of timeline and budgetary support INR 1.53 billion for total*	
2. Authority/agency responsible for the measure and legal authority	
Ministry of Ports, Shipping and Waterways	
3. Outline/explanation of the measure	
CCEA has approved extension of timeline and budgetary support beyond 31.03.2014 for release of committed liability of shipbuilding subsidy through budgetary support of approximatively INR 1.53 billion for a total number of 51 vessels, including retained subsidy for 47 vessels and full subsidy for 4 vessels. This subsidy is to be released in financial years 2019-20, 2020-21 and 2021-22. Guidelines have been formulated. Ministry has released subsidy of about INR 160 million in FY 2019-20 and INR 920 million in FY 2020-21.	
4. Estimated value	USD 20.13 million (INR 1.53 billion)
5. Start and end date	Start date: 2019; End date: 2022
6. References	
Government of India Ministry of Ports, Shipping and Waterways Transport Research Wing (2022): "STATISTICS OF INDIA'S SHIP BUILDING AND SHIP REPAIRING INDUSTRY 2020-21", https://shipmin.gov.in/content/statistics-indias-ship-building-and-ship-repairing-industry-2020-21 , accessed on 24 March 2023 Newspaper Shipping Tribune: "CCEA nod for shipbuilding subsidy to yards on a scheme that ended 12 years ago", https://www.shippingtribune.com/news/shipping/CCEA+nod+for+shipbuilding+subsidy+to+yards+on+a+scheme+that+ended+12+years+ago , accessed on 4 April 2023	

1. Type of the measure of support and its title	
N Domestic build or domestic content requirements *Update: Make in India order for a high-capacity dredger*	
2. Authority/agency responsible for the measure and legal authority	
The Ministry of Shipping	
3. Outline/explanation of the measure	
Update on previously mentioned support measure "Make in India Order" (2021): Initiated by the Make in India program, the Dredging Corporation of India has signed a contract with Cochin Shipyard on 17 March 2022 for construction of a high-capacity dredger for EUR 104 million.	
4. Estimated value	
5. Start and end date	Announced 16 of March 2022
6. References	
Newspaper Business Standard (2022): "Dredging Corporation of India to sign contract with Cochin Shipyard", https://www.business-standard.com/article/news-cm/dredging-corporation-of-india-to-sign-contract-with-cochin-shipyard-122031600187_1.html, accessed on 22 March 2022. Newspaper Marine Insight (2022): "Historic Agreement Inked For Construction Of India's Largest Dredger To Be "Made In India", https://www.marineinsight.com/shipping-news/historic-agreement-inked-for-construction-of-indias-largest-dredger-to-be-made-in-india/, accessed on 22 March 2022.	

3.1.6. New Zealand

1. Type of the measure of support and its title	
L Any form of income or price support *The New Zealand Customs Service granted general import tariff concessions on the importation of certain goods*	
2. Authority/agency responsible for the measure and legal authority	
New Zealand Customs Service	
3. Outline/explanation of the measure	
On 14 April 2022, the New Zealand Customs Service granted general tariff concessions on spare and service parts of certain vessels. They also granted certain firm-specific tariff concessions. Aaron Samuel, Supervising Customs Officer, Revenue and Assurance, New Zealand Customs Service, acting pursuant to section 8 of the Tariff Act 1988 under delegated authority hereby in accordance with Part II of the Tariff approve in respect of the entry of goods listed in the First Schedule to this notice the rates of duty or exemptions from duty specified in that Schedule with effect from the first day of the month so specified. FIRST SCHEDULE-Tariff Concessions Approved Spare and service parts of the vessels: Valentine [IMO 9166625], Kaitaki [IMO 9107942], Aratere [IMO 9174828], and Kaiarahi [IMO 9147291], (regardless of tariff classification), excluding consumable items (e.g., those items which are not permanently fixed to, or which form part of, the vessel)	
4. Estimated value	
5. Start and end date	Start date: March 2022; End date: Indefinite
6. References	
Global Trade Alert (2022): " New Zealand: Introduction of Tax Concessions on 14 April 2021", https://www.globaltradealert.org/state-act/65927/new-zealand-introduction-of-tax-concessions-on-14-april-2021 , accessed on 31 March 2023. New Zealand Customs Service (2022): "Tariff Concession Approval Notice No. 2020/14.", https://www.customs.govt.nz/globalassets/documents/tariff-concession-notices/tariff-concession-approval-notice-14-2022-.pdf , accessed on 31 March 2023.	

1. Type of the measure of support and its title	
L Any form of income or price support *The New Zealand Customs Service granted general import tariff concessions on the importation of certain goods*	
2. Authority/agency responsible for the measure and legal authority	
New Zealand Customs Service	
3. Outline/explanation of the measure	
On 1 December 2022, the New Zealand Customs Service granted general import tariff concessions on the importation of certain goods. Tony Peebles, Supervising Customs Officer, Revenue and Assurance, New Zealand Customs Service, acting pursuant to section 8 of the Tariff Act 1988 under delegated authority hereby in accordance with Part II of the Tariff approve in respect of the entry of goods listed in the First Schedule to this notice the rates of duty or exemptions from duty specified in that Schedule with effect from the first day of the month so specified. FIRST SCHEDULE-Tariff Concessions Approved Spare and service parts of the vessel Takutai Chief (IMO 951932) (regardless of tariff classification), excluding consumable items (e.g. those items which are not permanently fixed to, or which form part of, the vessel)	
4. Estimated value	
5. Start and end date	Start date: September 2022; End date: Indefinite
6. References	
Global Trade Alert (2022): " New Zealand: Introduction of Tariff Concessions on 1 December 2022", https://www.globaltradealert.org/state-act/70875/new-zealand-introduction-of-tariff-concessions-on-1-december-2022 , accessed on 31 March 2023. New Zealand Customs Service (2022): "Tariff Concession Approval Notice No. 2022/50", https://www.customs.govt.nz/globalassets/documents/tariff-concession-notices/tariff-concession-approval-notice-50-2022.pdf , accessed on 31 March 2023.	

3.1.7. Philippines

1. Type of the measure of support and its title	
H Government revenue that is foregone or not collected *FIRB approved the tax incentives for the operations of a proposed PHP 1.5 billion Cebu City-based shipping vessel*	
2. Authority/agency responsible for the measure and legal authority	
The Fiscal Incentives Review Board (FIRB)	
3. Outline/explanation of the measure	
The Fiscal Incentives Review Board (FIRB) approved the tax incentives for the operations of a proposed PHP 1.5 billion Cebu City-based shipping vessel, specializing in roll on roll off (RoRo) passenger and cargo operations. The grant includes four years of income tax holiday, five years of enhanced deductions, and 11 years of duty exemption on importations. Finance Secretary and FIRB Chairman Carlos Dominguez III emphasized that the tax incentive approval for the transportation player "aligns with the national government's aim to modernize transportation and to increase competition in the shipping industry in the Philippines." With increased access to sea transportation, the project is expected to stimulate a higher flow of goods and services between the cities of Cebu and Cagayan de Oro, Rodolfo said.	
4. Estimated value	PHP 1.5 billion
5. Start and end date	Announced on 16 March 2022, four years of income tax holiday, five years of enhanced deductions, and 11 years of duty exemption on importations
6. References	
Global Trade Alert (2022): " Philippines: Import duty exemptions provided for shipping vessel companies in Cebu City", https://www.globaltradealert.org/state-act/62576/philippines-import-duty-exemptions-provided-for-shipping-vessel-companies-in-cebu-city , accessed on 31 March 2023. Department of Finance(2022): "FIRB approves tax incentives for Cebu City-based RoRo shipping vessel", https://www.dof.gov.ph/firb-approves-tax-incentives-for-cebu-city-based-roro-shipping-vessel/ , accessed on 31 March 2023. Fiscal Incentives Review Board(2022): "FIRB approves tax incentives for Cebu City-based RoRo shipping vessel", https://firb.gov.ph/firb-approves-tax-incentives-for-cebu-city-based-roro-shipping-vessel/ , accessed on 3 April 2023	

1. Type of the measure of support and its title	
H Government revenue that is foregone or not collected *FIRB provided special corporate income tax and exempted import duties and VAT*	
2. Authority/agency responsible for the measure and legal authority	
The Fiscal Incentives Review Board (FIRB)	
3. Outline/explanation of the measure	
In May 2022, the Fiscal Incentives Review Board of the Philippines (FIRB) provided special corporate income tax and exempted import duties and VAT for Cerberus Capital Management on its project to develop and operate the Hanjin commercial shipyard in the Subic Bay. The project was granted special corporate income tax (SCIT), value-added tax (VAT) exemption from importation, VAT zero-rating on local purchases, and duty exemption on importation. Finance Secretary and FIRB Chairman Carlos Dominguez III supported the approval of the tax perks for Project AGILA with a total project cost of PHP 17 billion as the rehabilitation of the Hanjin shipyard presents economic potential, given its strategic location near the West Philippine Sea (WPS). He said, "The resumption of operations in the shipyard will also prompt development and productivity in the area, which can attract more investment opportunities into the country." Furthermore, the project will cater to both the Philippine Navy (PN) and potential export locators. It will be beneficial, specifically to the Navy, as it will involve the safety and efficiency of the Philippine government ships' performance and, consequently, strengthen national security.	
4. Estimated value	PHP 17 billion
5. Start and end date	Announced on 10 May 2022
6. References	
Global Trade Alert (2022): " Philippines: FIRB provided special financial incentives to Cerberus Capital Management", https://www.globaltradealert.org/state-act/63743/philippines-firb-provided-special-financial-incentives-to-cerberus-capital-management , accessed on 31 March 2023. Fiscal Incentives Review Board (2022): " FIRB approves tax perks for Project Agila, supports Hanjin shipyard rehabilitation", https://firb.gov.ph/firb-approves-tax-perks-for-project-agila-supports-hanjin-shipyard-rehabilitation/ , accessed on 31 March 2023.	

3.1.8. United Kingdom

1. Type of the measure of support and its title	
O Other official regulations and practice *UK Government to invest GBP 4 billion in refreshed National Shipbuilding Strategy*	
2. Authority/agency responsible for the measure and legal authority	
The Ministry of Defence	
3. Outline/explanation of the measure	

UK has reiterated its commitment to boost domestic shipbuilding with a GBP 4 billion (USD 6.6 billion) pledge to support construction of more than 150 new naval and merchant vessels over the next three decades.

More specifically, the strategy includes following actions:

- Establish an empowered National Shipbuilding Office (NSO)
- Provide clarity on future orders by setting out a 30 Year Cross-Government Shipbuilding Pipeline including the new National Flagship and the policy objectives which will underpin Government procurement programmes. Revised MOD shipbuilding procurement policy in DSIS is prepared
- Develop a model for a Home Shipbuilding Credit Guarantee Scheme to level the playing field for domestic shipbuilding orders with UK Export Finance (UKEF)
- Enable the commercialisation of critical shipbuilding technologies, particularly green technology by investing £206 million to establish a UK Shipping Office for Reducing Emissions (UK-SHORE) in DfT
- Support the shipbuilding sector to develop new technologies, including manufacturing and production technologies through UK Research and Innovation (UKRI) and Innovate UK program
- Proactively pursue export opportunities through a coordinated approach with Government and industry, underpinned by the Maritime Capability Campaign Office (MCCO) within the Department for International Trade (DIT) which will act as the exports arm of the NSO; and
- Work with industry to better understand the demand and supply of skills by creating a UK Shipbuilding Skills Taskforce reporting into the NSO

Regarding competitions which are part of a suite of interventions to be launched by the UK Shipping Office for Reducing Emissions (UK SHORE), following competitions has been announced

- The Clean Maritime Demonstration Round 2 competition has two strands:
  Strand 1: Clean Maritime Demonstration Competition Round 2 - Feasibility
  Strand 2: Clean Maritime Demonstration Competition Round 2 – Collaborative R&D

- The Clean Maritime Demonstration Round 3 competition has two strands:
  Strand 1: Clean Maritime Demonstration Competition Round 3 – Vessel or Infrastructure demonstrations
  Strand 2: Clean Maritime Demonstration Competition Round 3 –Vessel and Infrastructure combined demonstrations

- The Zero emission vessel and infrastructure competition is funding multiyear demonstrations across 3 strands:
  Strand 1: Battery electric vessels and charging infrastructure
  Strand 2: Shore power technologies, shore-side and vessel-side
  Strand 3: Alternative fuel vessels and refuelling infrastructure

4. Estimated value	GBP 4 billion
5. Start and end date	Announced 10 March 2022, funding over the next 30 years
6. References	

Ministry of Defence, Refresh to the National Shipbuilding Strategy (2022): "A refreshed strategy for a globally successful, innovative and sustainable shipbuilding enterprise", https://www.gov.uk/government/publications/refresh-to-the-national-shipbuilding-strategy , accessed on 22 March 2022.
Newspaper Lloyd's List (2022): "UK relaunches shipbuilding support scheme", https://lloydslist.maritimeintelligence.informa.com/LL1140116/UK-relaunches-shipbuilding-support-scheme , accessed on 22 March 2022.
UK Government (2022): "Clean Maritime Demonstration Competition Round 2 – Feasibility", https://apply-for-innovation-funding.service.gov.uk/competition/1190/overview , accessed on 24 Jan 2023.
UK Government (2022): "CMDC Round 3 – Vessel or Infrastructure demonstrations", https://apply-for-innovation-funding.service.gov.uk/competition/1313/overview/d85ba3d5-5f6f-4caf-978a-c00c21069024 , accessed on 4 April 2023
UK Government (2023): "ZEVI: Shore power technologies, shore-side and vessel-side", https://apply-for-innovation-funding.service.gov.uk/competition/1429/overview/b3f0710e-dad6-4ce4-a556-ddc04dbdfef1 , accessed on 4 April 2023

3.1.9. United States

1. Type of the measure of support and its title	
A Direct transfer of funds by Governments *Small Shipyard Grants – Update*	
2. Authority/agency responsible for the measure and legal authority	
U.S. Department of Transportation, Maritime Administration (MARAD)	
3. Outline/explanation of the measure	
The Maritime Administration's Small Shipyard Grant Program is designed to support small shipyard projects that make capital and related improvements; or provide training for workers in shipbuilding, ship repair, and associated industries. Supporting these types of projects drives efficiency, competitive operations, and quality ship construction, repair, and reconfiguration across the industry. The Small Shipyard Grant Program was authorized under Consolidated Appropriations Act, 2023 Pub. L. 117-328, December 29, 2022 (Small Shipyard Grant Program Codified at 46 U.S.C. § 54101). USD 20,800,000 is currently available for Small Shipyard Grants to: (1) make capital and related improvements to qualified shipyard facilities that will be effective in fostering efficiency; competitive operations; and quality ship construction, repair, and reconfiguration; and (2) provide training for workers in shipbuilding, ship repair, and associated industries. Potential applicants are advised the number of applications will likely exceed the funds available and that only a small percentage of applications will be funded. Historically, the program has selected roughly 15 to 30 applications to receive funding and the average grant amount has been approximately $1 million. In 2022, by following HR 2471, the FY 2022 Consolidated Appropriations Act, the law funds all government operations through the end of this fiscal year and includes USD 20 million for the next round of Small Shipyard Grants. Granting applications would be due around May 16, 2022 and awards should be announced around July 13, 2022.	
4. Estimated value	USD 20,800,000 in 2023
5. Start and end date	Start date: 2008; Applications must be submitted by 5:00 p.m. E.S.T. on February 27, 2023.
6. References	
U.S. Department of Transportation Maritime Administration (2023): "Small Shipyard Grants", https://www.maritime.dot.gov/grants-finances/small-shipyard-grants , accessed on 3 April 2023. Newspaper Lloyd's List (2023): "US grants $20m in funding to develop small shipyards", https://lloydslist.maritimeintelligence.informa.com/LL1143723/US-grants-$20m-in-funding-to-develop-small-shipyards , accessed on 24 Jan 2023. Magazine Workboat (2022): "Small Shipyard Gran program gets $20 million in funding", https://www.workboat.com/small-shipyard-grant-program-gets-20-million-in-funding, accessed on 22 March 2022. Congress US (2022): "H.R.2471 – Consolidated Appropriations Act, 2022", https://www.congress.gov/bill/117th-congress/house-bill/2471/text, accessed on 22 March 2022.	

1. Type of the measure of support and its title	
D Loan guarantees that support loans on terms and conditions more favourable than those commercially available *Federal Ship Financing Program (Title XI)*	
2. Authority/agency responsible for the measure and legal authority	
US Department of Transportation, Maritime Administration (MARAD)	
3. Outline/explanation of the measure	
• The Federal Ship Financing Program promotes U.S. Merchant Marine fleet and U.S. shipyard growth and modernization. Through long term debt repayment guarantees, the Program encourages U.S. ship owners to obtain new vessels from U.S. shipyards cost effectively. It also assists U.S. shipyards in modernizing their facilities for building and repairing vessels. The repayment term allowed under the program generally is much longer and the interest rates are lower than those available from the commercial lending market because the obligations guaranteed by the U.S. Government. • The approximate subsidy available in 2022 is to be determined and is currently unknown. • Recent agenda: Pending Applications - as of February 23, 2023 Outstanding Guarantees - as of September 2, 2022 Previously Approved Applications - as of September 2, 2022	
4. Estimated value	https://www.maritime.dot.gov/grants/title-xi/pending-applications
5. Start and end date	Start date; 1937
6. References	
U.S. Department of Transportation, Maritime Administration (2022): "Federal Ship Financing Program (Title XI)", https://www.maritime.dot.gov/grants/title-xi/federal-ship-financing-program-title-xi , accessed on 3 April 2023. U.S. Department of Transportation Maritime Administration (2021): "Subsidy Availability & History", https://www.maritime.dot.gov/grants-finances/title-xi/subsidy-availability-history, accessed on 22 March 2022.	

1. Type of the measure of support and its title	
H Government revenue that is foregone or not collected *Construction Reserve Fund*	
2. Authority/agency responsible for the measure and legal authority	
US Department of Transportation, Maritime Administration (MARAD)	
3. Outline/explanation of the measure	
• The Construction Reserve Fund (CRF) is a financial assistance program that provides tax deferral benefits to U.S.-flag operators. Eligible parties can defer the gain attributable to the sale or loss of a vessel, provided the proceeds are used to expand or modernize the U.S. merchant fleet. The primary purpose of the CRF is to promote the construction, reconstruction, reconditioning, or acquisition of merchant vessels that are necessary for national defense and to the development of U.S. commerce. • A CRF may be established by any citizen of the United States who owns, in whole or in part, a vessel operating in the foreign or domestic commerce of the United States or in the fisheries. Additionally, a citizen who is operating such vessel or vessels owned by another individual may establish a CRF. The benefits available to the non-owner operator, however, are limited. In the event of sale or actual constructive total loss of a vessel, the CRF allows the non-recognition of gain for purposes of Federal income taxes. Funds deposited in the CRF must be used for the construction, reconstruction, or acquisition of a new vessel constructed or reconstructed in the United States and documented under the laws of the United States.	
4. Estimated value	None performed
5. Start and end date	Start date: 1936
6. References	
US Department of Transportation, Maritime Administration (2019): "Construction Reserve Fund", https://www.maritime.dot.gov/grants/construction-reserve-fund , accessed on 3 April 2023.	

1. Type of the measure of support and its title	
H Government revenue that is foregone or not collected *Capital Construction Fund*	
2. Authority/agency responsible for the measure and legal authority	
US Department of Transportation, Maritime Administration (MARAD) US Department of Commerce, National Oceanic and Atmospheric Administration	
3. Outline/explanation of the measure	
• The Capital Construction Fund (CCF) program was created to help owners and operators of United States-flag vessels secure the capital necessary to modernize and expand the U.S. merchant marine. The program encourages construction, reconstruction, or acquisition of vessels through the deferment of Federal income taxes on certain deposits of money or other property placed into a CCF. Participants must meet U.S. citizenship requirements. • Vessels built with CCF funding must be built in the United States and documented under the laws of the United States for operation in the nation's foreign, Great Lakes, short-sea shipping or non-contiguous domestic trade or its fisheries. • The CCF Program was significantly expanded in December 2022 with the passage of the National Defense Authorization Act for Fiscal Year 2023. Section 3544 of the Act expanded the use of the program to all U.S. built vessels which are engaged in the domestic or foreign commerce of the United States, doing away with limitations on the availability of the CCF program to certain geographic trades that had been in effect.	
4. Estimated value	
5. Start and end date	Start date: 1970s
6. References	
US Department of Transportation, Maritime Administration (2023): "Capital Construction Fund", https://www.maritime.dot.gov/grants/capital-construction-fund, accessed on 3 April 2023. US Department of Transportation, Maritime Administration (2023): "2023 Capital Construction Fund (CCF) Listing", https://www.maritime.dot.gov/grants-finances/2023-capital-construction-fund-ccf-listing, accessed on 3 April 2023.	

1. Type of the measure of support and its title	
M Protection of the Domestic Market *Executive order on public procurement to maximize the use of goods produced in, and services offered in, the U.S. – Update*	
2. Authority/agency responsible for the measure and legal authority	
Executive Office of the President	
3. Outline/explanation of the measure	
The executive order directs agencies to strengthen requirements about purchasing products and services from U.S. workers and businesses. Consistent with applicable law, the United States should use terms and conditions of Federal financial assistance awards and Federal procurements to maximize the use of goods, products, and materials produced in (and services offered in) the United States. Furthermore, the executive order indicates that the United States Government should, whenever possible, procure goods, products, materials, and services from sources that will help American business compete in strategic industries and help America's workers thrive. Additionally, to promote an accountable and transparent procurement policy, each agency should vest waiver issuance authority in senior agency leadership, where appropriate and consistent with applicable law. The executive order reiterates the support for the Jones Act, in the way that "Made in America Laws" include laws requiring domestic preference for maritime transport, including the Merchant Marine Act of 1920 (Public Law 66-261), also known as the Jones Act. **Update**: In April 2021, the President opened the new Made in America office which reviews proposed waivers of Made-in-America laws and guides agencies on the use of taxpayer dollars to support U.S manufacturing.	
4. Estimated value	
5. Start and end date	Strat date: January 2021; End date: unknown
6. References	
The White house (2021): "FACT SHEET: Biden-Harris Administration Issues Proposed Buy American Rule, Advancing the President's Commitment to Ensuring the Future of America is Made in America by All of America's Workers", https://www.whitehouse.gov/briefing-room/statements-releases/2021/07/28/fact-sheet-biden-harris-administration-issues-proposed-buy-american-rule-advancing-the-presidents-commitment-to-ensuring-the-future-of-america-is-made-in-america-by-all-of-americas/, accessed on 22 March 2022.	

1. Type of the measure of support and its title	
A Direct transfer of funds by Governments *U.S. Senate approved the Inflation Reduction Act (IRA) of 2022*	
2. Authority/agency responsible for the measure and legal authority	
U.S. Senate	
3. Outline/explanation of the measure	
On 7 August 2022, the U.S. Senate approved the Inflation Reduction Act (IRA) of 2022, combining the twin objective of reducing the inflationary effects of the global energy crisis whilst tackling the climate change crisis. "The bill's USD 40 billion investment in domestic clean energy manufacturing and shipbuilding is an important down payment that will unleash the vast potential of offshore wind and localize a supply chain on American shores creating thousands of good-paying jobs." said Liz Burdock, president and CEO of the Business Network for Offshore Wind. A total of USD 369 billion will be disbursed, dedicated to improving energy security and achieving climate change goals. The IRA includes USD 3 billion in grants and rebates for port authorities and marine terminals to purchase zero-emission cargo-handling equipment until September 2027. The goal is to address air pollution in and around ports.	
4. Estimated value	USD 40 billion
5. Start and end date	Approved on 7 August 2022
6. References	
Newspaper Marinelog (2022): "Inflation Reduction Act: Good news for offshore", https://www.marinelog.com/offshore/inflation-reduction-act-good-news-for-offshore/ , accessed on 10 April 2023 IEA (2022): "Inflation Reduction Act 2022: Sec. 60113 and Sec. 50263 on Methane Emissions Reductions", https://www.iea.org/policies/16317-inflation-reduction-act-2022-sec-60113-and-sec-50263-on-methane-emissions-reductions , accessed on 10 April 2023 Newspaper Hellenic Shipping News (2022): "4 ways the Inflation Reduction Act could impact supply chains", https://www.hellenicshippingnews.com/4-ways-the-inflation-reduction-act-could-impact-supply-chains/ , accessed on 10 April 2023	

Endnotes

[1] Chinese Owners' Newbuild Orders in 2022 (Clarksons research, 31 January 2023)

[2] World Fleet Monitor by Clarksons research, WFM Vol 14 No 2 February 2023 (clarksons.net)

[3] Microsoft PowerPoint - 19. ASEF 9th Forum - SBIC Presentation on VIETNAM MARITIME INDUSTRY (26Nov 2015).ppt [互換モード] (asef2015.com)

[4] https://www.hellenicshippingnews.com/hyundai-vietnam-shipbuilding-company-exports-ships-to-16-countries/

[5] Former Hanjin Subic Bay Shipyard in Philippines Being Sold to Cerberus (maritime-executive.com)

[6] https://www.rivieramm.com/opinion/opinion/indonesia-has-20-of-the-global-tug-fleet-26858

[7] It is the result of factory operation census conducted by MOEA. It includes ship builders, boat builders, and floating structure manufactures.

(https://www.moea.gov.tw/MNS/english/content/ContentMenu.aspx?menu_id=32940).

[8] World Fleet Monitor by Clarksons research, WFM Vol 14 No 2 February 2023 (clarksons.net)

[9] Economic Contributions of U.S. Shipbuilding and Repairing Industry.pdf (dot.gov)

[10] https://www.mida.gov.my/industries/manufacturing/transport/

[11] MHB-Integrated-Annual-Report-2021-website.pdf

[12] http://www.wms.com.bd/, http://www.anandashipyard.com/

[13] MaritimeIndiaVision 2030 Report.pdf (sagarmala.gov.in)

[14] SBR FINAL 2020 21.pdf (shipmin.gov.in)