

19 JULY 2024

Ursula VON DER LEYEN

President of the European Commission
Brussels
Belgium

Subject: Urgent call for a European Maritime Industrial Strategy

Dear Ms Von der Leyen,

As representatives of the European shipyards and maritime equipment manufacturers, we write to you to emphasise **the critical strategic importance of shipbuilding and its supply chain for Europe's defence, strategic autonomy, global maritime leadership, twin transition, and economic prosperity.**

Looking at the EU decarbonisation and digitalisation ambitions, and at the competitiveness and security challenges currently faced by the maritime sector, Europe should rapidly act to make sure that we maintain and consolidate a strong maritime industrial capacity, both civil and military.

Therefore, we call upon the next European Commission to urgently issue a new European Maritime Industrial Strategy to properly support the sector. This request has also been supported by the Council of the European Union in its conclusions on "A competitive European industry driving our green, digital and resilient industrial future" (24 May), and by the European Parliament in its resolution on "Building a comprehensive European ports strategy" (17 January).

With 9% of its annual turnover invested in research, development and innovation, the maritime technology industry is one of Europe's most innovative industries. European shipyards are integrators of (advanced) systems, equipment, and technologies produced by a supply chain of European maritime equipment manufacturers and technology suppliers. They also provide strong expertise in fixed and floating platforms (including for wind energy), as well as in ship maintenance, repair, conversion, and retrofit.

European shipyards and their supply chain also build, equip and maintain naval ships and platforms, and produce military systems, equipment or technologies that are paramount for Europe's defence, security, border protection, and protection of critical infrastructure both at sea and underwater. Commercial and military shipbuilding are closely connected with a cross-fertilisation of innovations and overlapping supply chains. This cross-fertilisation is an asset for Europe that should not be lost. For this reason, it remains of utmost importance for Europe to safeguard its industrial civil shipbuilding capacity in order to safely maintain its capacity in naval defence.

Europe's reliance on maritime trade is profound, with 80% of its external trade and 40% of its internal trade carried by sea. Ships and platforms built in Europe - with European-manufactured technologies, systems and equipment - enable the safe, efficient, and environmentally-friendly transport of goods, energy, and people, and are vital for emerging sectors of the Blue Economy (such as offshore renewable energy). Throughout their long lifespan, ships need to be periodically retrofitted in ship repair yards, to ensure compliance with new regulations and to integrate the latest green and digital technologies.

However, **Europe's strategic autonomy in shipbuilding and ship repair, as well as its current maritime technological leadership, are under threat from a longstanding unfair competition.** Distortive practices including subsidies and trade protectionism continually undermine the global level playing field for European shipyards, whilst maritime equipment manufacturers are confronted with increasing trade obstacles. Without adequate and sectoral measures, Europe's maritime industrial capacity will further decline and even disappear at a time of geopolitical tensions and business opportunities arising from the green and digital transitions.

To reverse this situation and reinforce Europe's maritime technological leadership, under the umbrella of SEA Europe, **we ask to the incoming European Commission to ensure the swift adoption and implementation of a European Maritime Industrial Strategy.**

Enclosed to this letter you can find the SEA Europe Manifesto, **our strategic plan to consolidate Europe's global leadership in complex shipbuilding and maritime equipment manufacturing by 2035, whilst - at the same time - regaining strategic or emerging shipbuilding and ship repair segments for the European Blue Economy.** The plan is based on the following building blocks:

- 1. Industrial sovereignty and competitiveness:** Introduce "made in Europe" requirements in strategic public procurement markets and provide financial and fiscal incentives for shipowners to build and retrofit vessels in Europe, with the aim to secure a domestic shipbuilding critical mass, thereby strengthening Europe's supply security.
- 2. Supportive regulatory framework:** Establish an Industrial Alliance and a Maritime Industry Act to support the business case for sustainable and digitalised ships and create the necessary collaborative framework for success.
- 3. Technological leadership:** Continue supporting research, development, and innovation in maritime technologies through dedicated funding mechanisms, to ensure Europe remains at the forefront of maritime technology.
- 4. Skilled workforce:** Promote workforce retention, upskilling, and mobility across Europe through targeted initiatives and educational programs.

In conclusion, **urgent policy action is imperative to safeguard Europe's strategic autonomy and reinforce its industrial capacity and technological leadership in the maritime domain.** Failure to act decisively risks relinquishing our critical industrial capacity and compromising our economic and defence interests as well as the achievement of the green and digital transitions. We stand ready to collaborate with the incoming European Commission to ensure the swift implementation of a robust Maritime Industrial Strategy.

Yours sincerely,

The signatories listed below

Enclosure: Setting Sail to Build in Europe 10,000 Sustainable and Digitalised Vessels by 2035 - SEA Europe's call for a European Maritime Industrial Strategy.

Nuno Antunes dos Santos

Chief Executive Officer of Lisnave Shipyards

Florent Battistella

Chief Executive Officer of Chantier Naval Couach

David Bellot

Director General of Issartel

René Berkvens

Chairman of the Shipyards' & Maritime Equipment Association of Europe

Philippe Berterottiere

Chairman of the Board and Chief Executive Officer of GTT

Derk te Bokkel

Chief Executive Officer of Royal IHC

Thomas Buret

Chief Executive Officer of Exail

Laurent Castaing

Director General of Chantiers de l'Atlantique

Kåre Groes Christiansen

Chief Executive Officer of Odense Maritime Technology

Arnout Damen

Chief Executive Officer of Damen Shipyards Group

Klaus Deleroi

Managing Director of REINTJES GmbH

Vice-President of Verband für Schiffbau und Meerestechnik e.V.

Anne-Mette Elsborg

Chief Executive Officer of PJ Circular

Harald Fassmer

Managing Director of Fassmer GmbH & Co. KG

President of Verband für Schiffbau und Meerestechnik e.V.

Vincent Faujour

Chief Executive Officer of Piriou

Pierroberto Folgiero

Chief Executive Officer of Fincantieri

Ricardo Dominguez García-Baquero

Presidente of NAVANTIA (Grupo SEPI)

Hervé Guillou

Chairman of the Board of Exail

Jacques Hardelay

Honorary President of Chantier Naval de Marseille

Roland Joassard

Chairman of the Board of OCEA

Peter Krogsgaard Sørensen

Executive Vice-President of FORCE Technology

Dr. Uwe Lauber

Chief Executive Officer of MAN Energy Solutions

Vice-President of Verband für Schiffbau und Meerestechnik e.V.

Almudena López del Pozo

Chief Executive Officer of PYMAR

Bernard Meyer

General Manager of MEYER WERFT GmbH & Co. KG.

Vice-President of Verband für Schiffbau und Meerestechnik e.V.

Jorge Monteiro

Chief Executive Officer of Navalrocha - Sociedade de Construção e Reparação Navais SA

Fabien Napolitano

Director General of Exail

Christina Ørskov

Director of Orskov Yard

Pierre Eric Pommellet

Chairman and Chief Executive Officer of Naval Group

Serge Quaranta

Chief Executive Officer of Constructions Mécaniques de Normandie

David Queva

Chief Operating Officer of Monaco Marine

Patrik Rautaheimo

Chairman of the Board of Elomatic

Hervé Ridoux

Executive Director of AXIMA

Kim Salmi

Managing Director of Helsinki Shipyard

Olivier Sanquer

Director of Vinci Energie

Anders Skibdal

Chief Executive Officer of PureteQ

