A EUROPEAN INDUSTRIAL MARITIME STRATEGY

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SEA Europe's Perspective

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Why did SEA Europe push for an EMIS?

The Background (1)

- **The maritime manufacturing industry (shipyards + maritime equipment) is strategic ....**
  - For Defence
  - For Access to Trade and Blue Economy
  - For the carriage of raw materials, energy supply and food supply

- **.... Except in the EU since mid-2000s**
  - EU state aid for shipyards was abolished (contrary to the Maritime State Aid Guidelines for Shipping)
  - “Horizontal / one-size-fits-all policies” instead of tailor-made / sector-specific policies
  - No trade defence instruments for shipyards. So no tools to combat fierce & unfair global competition
  - The result ... devastating:
    - EU shipyards build only 5% of global tonnage and are virtually kicked out from large merchant shipbuilding.
    - EU maritime equipment manufactuters and EU shipowners have become dangerously dependent on Asia.

- **So SEA Europe decided to act and lobby the European Commission (“*phase 1*”)**
  - In 2018:
    - The European Commission reconsidered shipyards strategic for Europe .... But no sectoral strategy yet!!!
    - The European Commission qualified China as systemic rival. It helped to draw attention to Made in China 2025.
  - 2020 – 2023: The pandemic hit cruise shipbuilding very hard
  - Geopolitical tensions and increased trade protectionism have made the EU more receptive for strategic autonomy and supply chain resilience considerations,

The Background (2)

- **But a strategic sector needs a sectoral tailor-made strategy. So, SEA Europe launched phase 2**
  - **2022** – EESC Opinion – First EU Institution calling for EMIS
  - **2023** – Mobility Transition Pathways – Waterborne Roundtable led by SEA Europe/DG GROW
  - **2024**:
    - A political “grand slam”: All main EU Institutions call for a European Maritime Industrial Strategy (EMIS)
    - The Draghi Report recognises the industry’s global challenges and calls for action
    - U. Von der Leyen Mission Letter to Transport Commissioner Tzitzikostas
  - **2025**
    - Competitiveness Compass
    - Szczecin Declaration
    - High-Level stakeholders’ roundtable with EVP Séjourné and Transport Commissioner Tzitzikostas
    - A Stakeholders’ Call for Evidence on EMIS
    - Ongoing discussions in the European Commission and with relevantg stakeholders
- **Q1 2026: Anticipated publication of EMIS**

What is SEA Europe's Vision for EMIS?

An impactful European Industrial Maritime Strategy

Not a new LeaderSHIP 2015 or 2020 document

EMIS = 3 Objectives – The 3 "R"s

- **Objective 1 – Reinforce** Europe's global leadership
- **Objective 2 – Regain** strategic ship types
- **Objective 3 – Reap** the benefits of the Blue Economy

SEA Europe
Shipyards' & Maritime Equipment Association

EMIS must support business in 5 lead markets

1. **Strategic autonomy assets:** Naval ships, underwater assets, and patrol vessels.

2. **The blue economy**: Complex specialized vessels (e.g., offshore supply vessels, cable-layers, dredgers, fishing and research vessels, workboats, and icebreakers).

3. **Highly complex ships driving technology advancement** (e.g., cruise ships).

4. **Sustainable waterborne transport:** Shortsea and inland navigation, transport of raw materials and energy. Ferries.

5. **Sustainable retrofit and conversion:** To upgrade existing ships to meet sustainability criteria and improve efficiency.

Why these markets?

- Demand is less volatile and business conditions are more stable than in large cargo segments.
- European shipowners' demand remains strong with more orders for ships placed in Europe.
- A competitive advantage can be gained through design and technology superiority instead of merely price and standardization like for high-volume markets.
- For cruise, Europe leads in design and technology, with a strong reputation, an ability to meet shipowners' demand and a constructive producer/buyer relationship creating much EU added value

How to get there?

SEA Europe’s proposal for 6 pillars and 22 policy recommendations

Competitiveness and supply chain resilience

- Enhancing manufacturing capacity
- Upgrade of shipyards
- Investment and financing

Strengthened maritime defence, security, and resilience

- Military mobility
- Critical maritime and underwater infrastructure
- Dual use technologies

Clean vessels and maritime technologies

- Boosting demand for clean and smart ships
- Incentives for shipowners subject to European preference criteria
- Framework for ship lifecycle management

Innovation and digitalisation

- Smart manufacturing
- Research, development, and innovation
- EU research programmes (co-programmed partnership)

Skills and social dimension

- Skilling, upskilling, and reskilling
- Training centers
- Mutual recognition of training and qualifications

Boosting our market access, ensuring a level playing field and guaranteeing our economic security

- Economic security
- International partnerships & access to global markets
- Trade defence against unfair practices

EMIS in a nutshell

- Overall Goals:
  - Consolidate and boost demand in lead markets to create business opportunities for European shipyards.

- Supply side (shipyards):
  - Goal: **Investments** to modernise shipyard infrastructure and production (incl. Clean & Circular production)
  - How?
    - Support **Research and Development** to produce innovative state-of-the-art ships and technologies
    - **Easier access to dedicated public funding** (both EU and Member States), incl. better use of EU ETS revenues
    - **Guarantees to derisk private investments**, especially in circularity, robotization, innovation deployment, infrastructure, clean energy, and workforce upskilling.
  - What is needed? **An investment roadmap**

- Demand side (shipowner):
  - Goal: A **policy framework** that encourages shipowners to order ships in Europe and rewards those that choose Europe.
  - How?
    - **Incentives** that offset the extra cost compared to Asian shipyards.
    - **Non-price competitive advantages** (e.g., a life cycle approach)
    - **EU added value conditions** in public procurement and for licencing procedures or public auctions
  - What is needed?
    - A **Maritime Industrial Alliance** to identify & boost business cases
    - **Fleet renewal plans** for sustainable and digitalized fleets

The End

For any questions:

Contact SEA Europe team
https://www.seaeurope.eu/the-association/