

Europe

Jørlunde, 12th November 2013

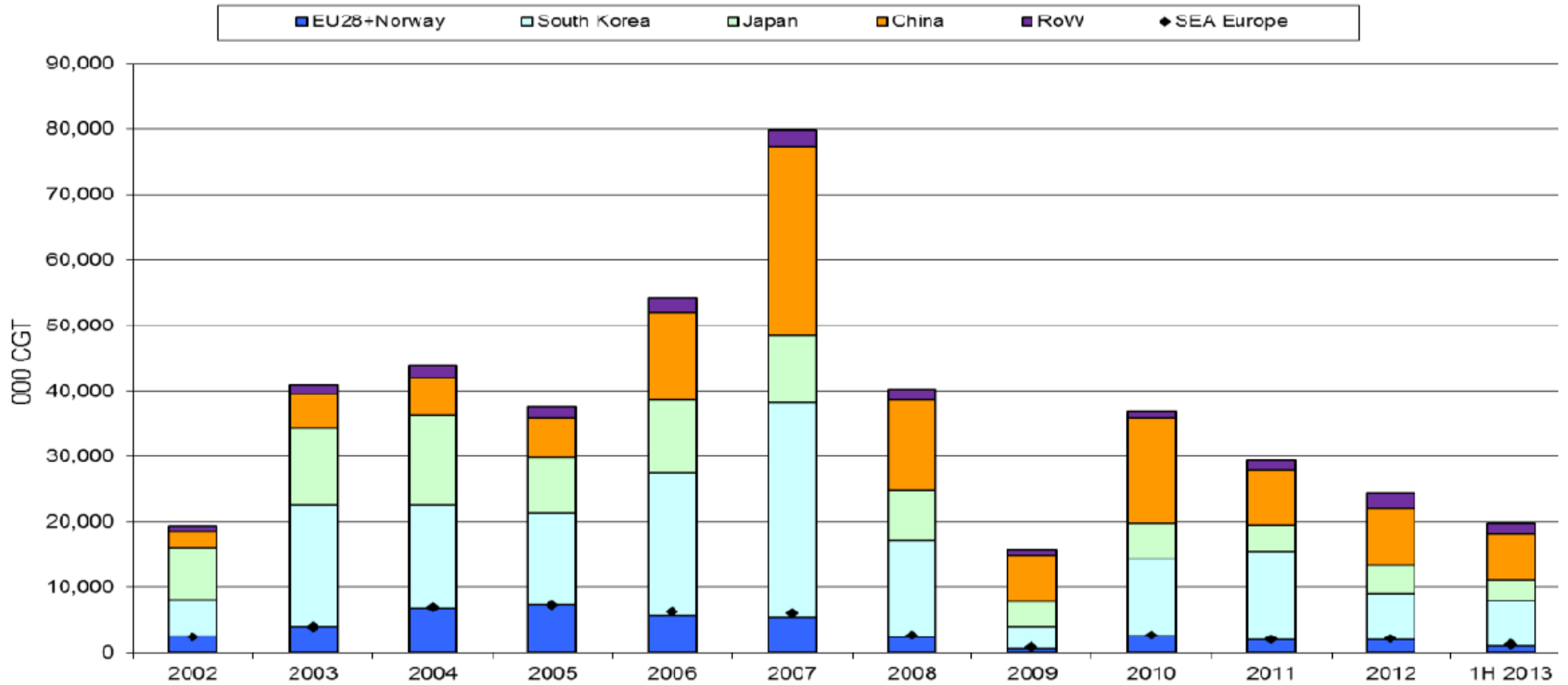
IndustriALL Global Meeting

Shipbuilding - Shipbreaking

Content

1. General situation Europe
2. Recent initiatives

New Orders by Main Shipbuilding Areas



Data source: IHS Fairplay

General situation in Europe

- Increasing differences North/South
 - Northern Europe sees almost stabilization during last semester, on low levels of activity
 - Southern Europe (incl. Balkans) experience further decrease of activities: Short-time working schemes down to 10% of activity (compared to 2007/2008)
- Strategies towards diversification/specialization
 - Offshore, cruise ships, mega-yachts
 - Shipbreaking, -recycling
 - “Classical” business (container) almost disappears

- Order-books only for a short perspective
- Restructuring and inactivity in defence sector
- Southern Europe: yards being sold to competitors (transfer of know-how)
- Liquidity still difficult to get from banks
- Working conditions difficult
 - Precarious work increasing (specific forms)
 - Subcontracting of parts with low added value

EU Institutions

- LeaderSHIP 2020 report (Feb. 2013):
 - Employment and skills
 - Improving market access and fair market conditions
 - Access to Finance
 - Research, development and innovation
 - (<http://ec.europa.eu/enterprise/sectors/maritime/shipbuilding/leadership2015/>)

Content

1. General situation Europe
2. Recent initiatives

- Sectoral Skills Council (within the SSDC)
 - Joint initiative on skills needs, initial and vocational training
 - Coordination with SEA Europe
 - Communication towards EU Institutions
- Follow-up on LeaderShip 2020 (SSDC)
 - Focussing on employment and E&T aspects
 - Pressure for (useful) industrial policy for the sector

Social Standards



- “Joint Statement on Social Standards in the European Shipbuilding and Ship Maintenance, Repair and Conversion Sector,” 15th Oct. 2013
 - Coverage by collective agreements
 - The right of association and workers’ representation
 - Health, safety and environment

- ... Social Standards (continued)
 - Training, development of human resources and fostering innovation
 - Working conditions
 - Restructuring
 - Suppliers and sub-contractors
- *Missing:*
 - Wages (explicitly)
 - Supply-chain issues (explicitly)

Questions? Comments?

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Founding Organizations:

- Ex-EMF: <http://www.emf-fem.org/>
- Ex-EMCEF: <http://www.emcef.org/>
- Ex-ETUF-TCL: <http://www.etuf-tcl.org/>