

Anticipating Future Trends in Shipbuilding and Shipbreaking Industries

Report on Europe

Rio de Janeiro, 19th November 2012

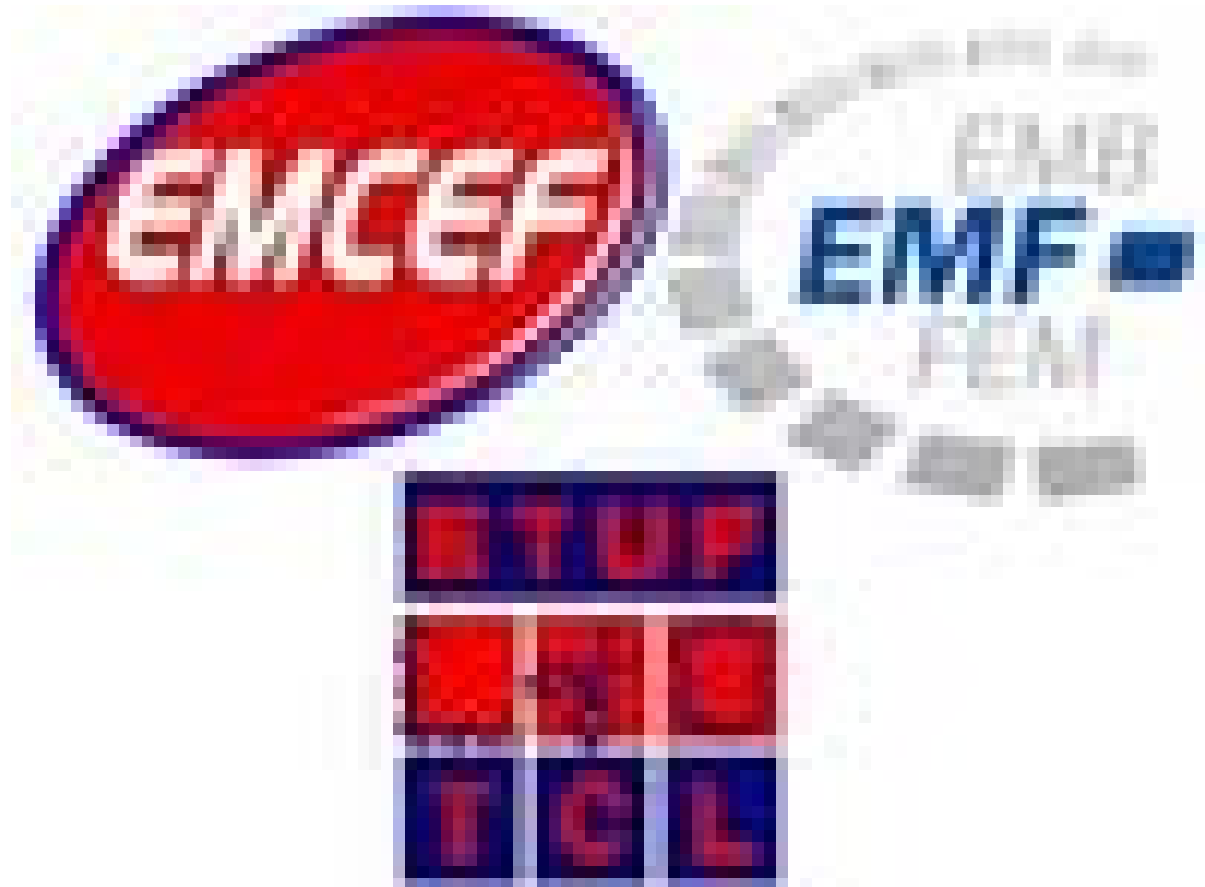
Content

1. industriAll – European Trade Union
2. Shipbuilding sector in Europe

(1)

INDUSTRIALL – EUROPEAN TRADE UNION

Founding Congress



Brussels, 16th May 2012



industriAll

EUROPEAN TRADE UNION

Founding Organisations

EMF: 4.8 M. members

EMCEF: 1.8 M members

ETUF:TCL: 500,000 members

Total affiliated organisations 196

Total members 7.1 millions

(2)

SHIPBUILDING SECTOR IN EUROPE

General context

- “Financial crisis”
- Austerity programmes
- Recession in the Euro area
- Public budgets reduce spending and investment
- Consequences on social policies
- Roll-back of social rights (not only of workers)
- Deregulation of labour markets
- Rising unemployment

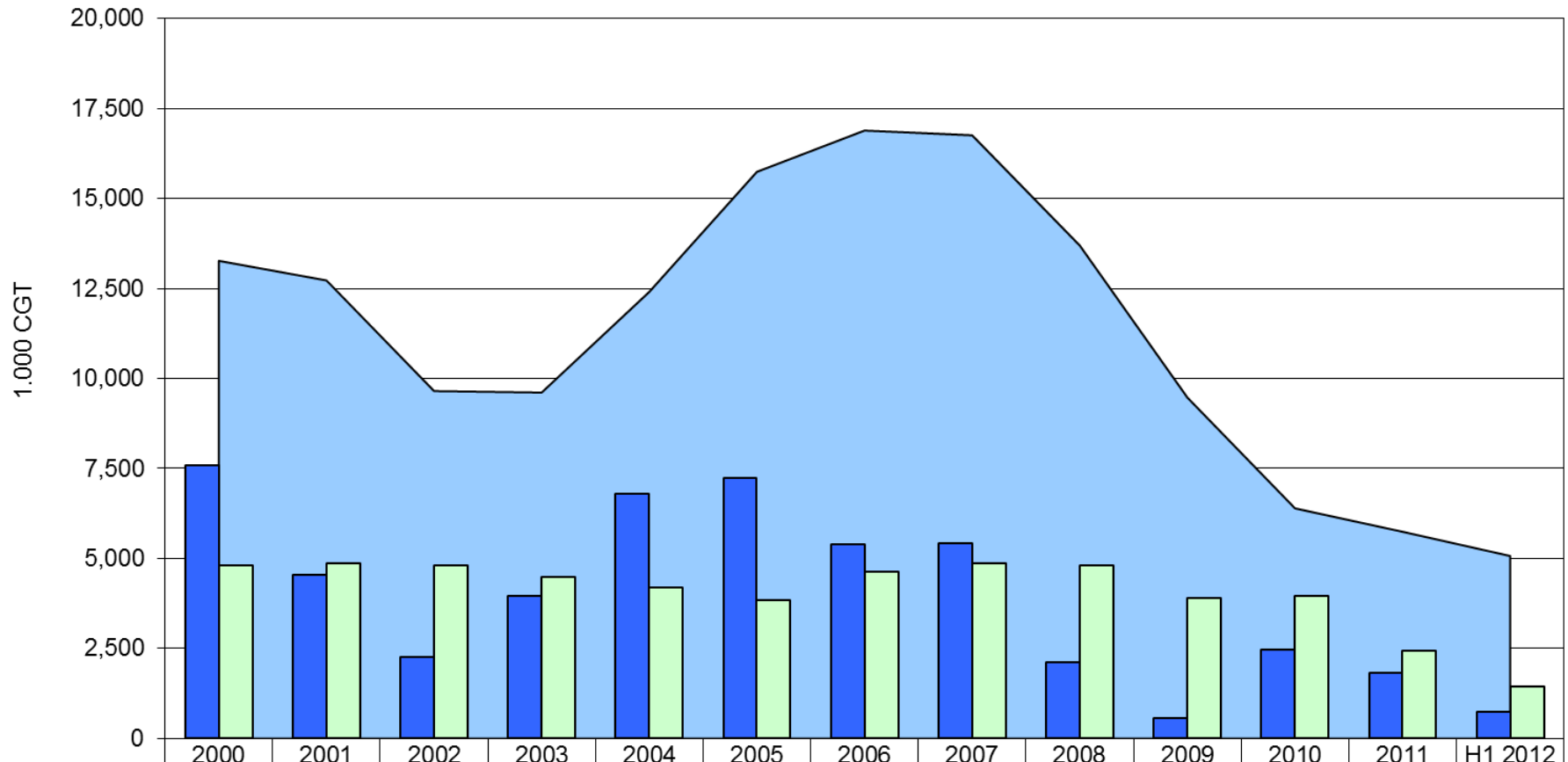
Economic situation

- A sector in crisis for at least two decades
- Declining employment and shop closures
- However: uneven distribution geographically:
 - Consolidation in Germany since last year;
 - Restructuring, especially in the south
- Medium-term outlook: order books are empty
 - Situation worsened since last year
- Employers talk about overcapacities
- “European shipyards have received almost 25% of the Non Cargo vessels ordered and continue to dominate the passenger ships segment, albeit the absolute figures in this segment remain low” (SEA Europe)

Shipbuilding activity

CESA Commercial Shipbuilding Activity

orderbook new orders completions



orderbook	13,267	12,724	9,652	9,610	12,406	15,738	16,885	16,752	13,692	9,470	6,394	5,744	5,071
new orders	7,591	4,534	2,262	3,951	6,798	7,226	5,379	5,425	2,114	561	2,459	1,822	735
completions	4,794	4,870	4,817	4,479	4,194	3,851	4,642	4,870	4,820	3,895	3,947	2,446	1,437

Strategies

- Specialisation of shipyards
- Reorientation/diversification
 - Offshore industries
 - Renewable energies (windpower)
- Bridging downturn in activity
 - Employers talk about overcapacities
 - Short-time working schemes?
 - Training/reskilling for workers

Specific topics

- Demographics
 - Ageing workforce
 - Lack of training and apprenticeships
 - Difficulties to recruit skilled workers (and engineers)
- Quality of employment
 - Increase of precarious work
 - Outsourcing (partly on-site)

Questions? Comments?

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Founding organisations:

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