COUNCIL
WORKING PARTY ON SHIPBUILDING

SHIPBUILDING WORKSHOP WITH NON-OECD ECONOMIES AND INDUSTRY

PROGRAMME

Paris, 4 p.m.-5 December 2008

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PARIS, 4-5 DECEMBER 2008

WORKSHOP THEME: The Changing Structure of the World Shipbuilding Industry

INTRODUCTION

This Workshop with non-OECD economies and industry is the latest in a series of events bringing together governments and business to discuss key issues affecting the world’s shipbuilding industry. The last event, held in December 2006, had the theme “The Global Shipbuilding Industry – a Stock-take”.

ORGANISATION ARRANGEMENTS

Venue

The Workshop will be held at the Salle des Nations, Tour Europe, 33 place des Corolles, 92049 Paris La Défense. Guidance on finding the venue can be found at Annex A.

The Workshop will commence at 15h00 on Thursday, 4 December, continuing on 5 December 2008.

Registration

Registration for the Workshop can be made by forwarding an e-mail with name, position and contact details to the Secretariat (see details below). These registrations should now be made as soon as possible so that security passes can be prepared to avoid delays to participants seeking to access OECD premises.

Presentations

Delegates wishing to make presentations on topics associated with the Workshop theme should advise the Secretariat as soon possible if they have not already done so.

Secretariat

Contact with the Secretariat on matters related to the Workshop can be made by e-mail to danny.scorpecci@oecd.org, by phone (+33 1 5424 9433) or fax (+33 1 4430 6257).

All registrations, documents and presentations (which should be sent electronically whenever possible), should be addressed to florence.hourtouat@oecd.org.
THEME OF THE 2008 WORKSHOP

The theme for the December 2008 Workshop is “The Changing Structure of the World Shipbuilding Industry” and will be conducted in three sessions:

i. **Supply/demand forecasts and price/cost developments**

   Consideration of most recent supply/demand forecasts, focusing on growth in the world economy, changes to the global fleet, future demand for various types of vessels, availability (and future availability) of shipbuilding production capacity.

   This session will also consider developments in newbuild prices and the impact on the sector of changing input costs, especially for steel, a key cost component in new vessel construction.

ii. **The changing structure of the world shipbuilding industry**

   This item will permit Delegates to take an intensive look at the industry and consider how it is changing to both meet the challenges, and exploit the opportunities, of globalisation, Foreign Direct Investment, mergers and acquisitions and the emerging environmental and climate change issues. Case studies can be presented, as well as views of future structural changes from the perspectives of policy makers who create the national and international frameworks within which the industry operates. The views of industry leaders who must make the investment decisions committing their companies to future strategies would be very welcome.

   In particular, the experience of the emerging economies that have been the recipients of considerable Foreign Direct Investment (FDI) affecting their shipbuilding and supporting industries would be valuable.

iii. **Government and industry responses to these market and structural changes**

   This session will provide an opportunity for governments and industry to explore possible (or actual) responses to changes in the structure of the world shipbuilding industry (especially the increasing foreign direct investment in shipyards), the likely future developments in supply and demand, the challenge of rapidly increasing input costs and emerging environmental and climate change issues.

   While it is possible for participants to prepare advance papers and presentations on the possible responses by governments and industry, the preferred approach would be for an interactive discussion amongst participants on possible responses, based on the material and discussions in the first two sessions.

**Participation**

The Council Working Party on Shipbuilding recognises the importance of active participation of the non-OECD economies in its work, and invitations have been sent to all those with significant or growing shipbuilding sectors. In addition, the participation of industry will also be crucial, and invitations have been sent to major shipbuilder associations, other relevant industry sectors and labour representatives.

**Chairpersons**

Separate chairs have been invited to manage the three Workshop sessions, and are listed in the Workshop Programme. Their task will be to oversee the sessions, lead the discussion after the formal presentations and provide a brief summary of key points that may arise.
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PARIS, 4 - 5 DECEMBER 2008

REVISED PROGRAMME

Workshop Theme: The Changing Structure of the World Shipbuilding Industry

Thursday 4 December

15h00 – 18h00

OPENING

Welcome and introduction to the Workshop by the Chairman of the WP6, Ambassador Harald Neple

FIRST SESSION: Shipbuilding supply and demand outlooks and price/cost developments

Chairman: Mr Reinhard Lüken, Secretary General CESA

- SAJ Global shipbuilding supply and demand outlook
  Mr Hidenori Munechika, Manager Planning & Research, SAJ

- China Analysis of the Development Trend of the World Shipbuilding Market

- KOSHIPA Review of factors affecting supply & demand for newbuildings
  Mr Sang Duk Bae – Assistant Manger

- Intertanko: Tanker Supply until 2015
  Mr Erik Ranheim

- WP6 Sec Some observations on the dry bulk sector

- IACS Experience from Implementation of Common Structural Rules for Tankers and Bulk Carriers
  Dr Kirsi Tikka

18h00 – 19h30

The OECD will host a cocktail for participants immediately after the closure of the First Session of the Workshop.
Friday 5 December
10h00 – 13h00

SECOND SESSION: The changing structure of the world shipbuilding industry

Chairman: Mr José Estebán Pérez García, Spanish Association of Naval Architects

- WP6 Sec Factors affecting the structure of the shipbuilding industry
- China Activities of World Shipbuilding FDIs in Recent Years
- Croatia: The Croatian Shipbuilding Industry
- Romania: Romanian Shipbuilding - Continuity and Competitiveness
- CESA: Innovation and Intellectual Property
- KOSHIPA Challenge, response & opportunities: Evolution of the world shipbuilding industry
  Mr Seok Joo Chung – Deputy General Manager
- Japan Recent activity in the Committee for Expertise in Shipbuilding Specifics
  Mr Hiroshi Iwamoto, Chairman, CESS
- TUAC Precarious Work-in Shipbuilding
  Mr Rob Johnston (International Metalworkers Federation – IMF)
- Lithuania Presentation by Litana Company Group

15h00 – 17h30

THIRD SESSION: Government and industry response to these market and structural changes

Chairman: Ambassador Harald Neple, Chairman WP6

- Responses by governments
  - Korea Future Agenda for the Korean shipbuilding industry
  - Japan Japanese shipbuilding policy
    Mr Koichi Kato, Director, International Affairs Office, Ministry of Infrastructure, Transport and Tourism
  - EC tba
  - China: The Development of the Chinese Shipbuilding Industry
  - Chinese Taipei Shipbuilding status upon the market turmoil

- Responses by industry and labour representatives
  - ICS The Shipowner Perspective
    Ms Emily Comyn, International Chamber of Shipping

CLOSURE AND SUMMATION BY CHAIRMAN
ANNEX A

HOW TO GET TO TOUR EUROPE

Tour Europe
La Défense 2
33 place des Corolles
92049 Paris La Défense Cedex

By car

From PORTE MAILLOT: cross over the Pont de Neuilly and take the Boulevard Circulaire. Keep to the right. Look for La Défense Secteur 1-8, the first exit off, and then look for La Défense 2 which you follow round to the left. You can park in “Les Reflets” car park (16€ per day, 4€ for up to 2 hours).

To access Tour Europe from “Les Reflets” car park: follow the OECD signs in “Les Reflets” (you can park on any floor). When in the lift press the button for Terrasse +1. Come out of the lift and walk onto the terrace. Walk straight ahead as far as you can go then turn right at the Pinocchio restaurant. The Tour Europe is straight ahead of you where you will see a large sculpture/fountain.

By taxi

Ask for La Défense 2. There is a set down area just below Tour Europe where taxis can stop on level – 2. The Tour Europe security desk on that level will call OECD security to grant access.

However, please note that the road system around La Défense is quite complicated, and some taxi drivers may have a problem finding the set-down area.

By public transport
(For more information, please see http://www.ratp.fr/)

RER: take line A to Grande Arche de la Défense, ‘Sortie F’ and, with the Grande Arche behind you, walk back towards Paris. The Tour Europe is situated on the left in La Défense 2. When you reach the restaurant Mond, 1 place des Corolles, take a hard left and Tour Europe is straight ahead.

METRO: line 1 - exit either Esplanade de la Défense or Grande Arche de la Défense. From the Esplanade de la Défense, walk towards the Grande Arche. The Tour Europe is situated on the right in La Défense 2. When you reach the restaurant Mond, 1 place des Corolles, take a hard right and Tour Europe is straight ahead.

SNCF: there are 3 lines possible to La Défense (Grande Arche):
   o St Lazare — St Nom la Bretèche
   o St Lazare — Versailles rive droite
   o St Quentin en Yvelines — La Défense

TRAMWAY : line T2 : Issy Plaine — La Défense (Grande Arche)

BUS : 14 different possibilities to La Défense (Grande Arche)
   o From central Paris — 73
   o From the west of Paris — 141, 144, 159, 258, 262, 272, 275, 278, 360, 378
   o From the north of Paris — 161, 174, 17