Session 3. Cooperation between maritime industries: views from selected industries

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OVERVIEW

- SEA Europe

- Setting the scene

- Types of cooperation

- Assessment
Who is SEA Europe?

European Shipyards

and

European Maritime Equipment Manufacturers
• 22 Member (National) Associations
• 18 countries
• Representing >22,000 companies
The Maritime Technology Sector: A Key Industry for Europe

- Marine Equipment: €60bn
- Commercial Newbuilding: €9.5bn
- Naval Newbuilding: €10.8bn
- Mega Yachts Newbuilding: €3.2bn
- Commercial SMRC: €3.2bn
- Naval Maintenance: €4.2bn

Total: €91bn

> 500,000 highly skilled workforce
Orderbook Value in Bn $ by end of 2015

EUROPE: 131.5
KOREA: 107.1
CHINA: 106.5
JAPAN: 49.6
USA: 204.5

Data source: Clarkson
SMRC Turnover in Million Euros

Source: SEA SMRC WG – Ship Maintenance, Repair, and Conversion
Equipment Suppliers Market Shares
Global production volume average = 125.5 bn €

- European Companies supplied volume (EU28+Norway)
- RoW supplied volume

Source: Balance
Setting the scene

- Cooperation in the maritime industries
  - From a regulatory perspective
  - From a R&D perspective
  - Not from an economic perspective (= company matter)
Types of cooperation

(1) Regulatory cooperation

(2) R&D – related cooperation
Regulatory Cooperation

- Maritime Industries Forum
- Industry Alliance for Multimodal Connectivity and Logistics for Growth
Maritime Industries Forum (M.I.F.)

- Created in 1992
- Led by the European Commission
- Industry-driven
- Discuss challenges and priorities for the maritime industries.
  - E.g. Maritime Industry R&D Master Plan
- Seek common approach: “together we are stronger”
- Raise the industries’ profile.
- However, the activities of the Forum were stopped mid-2000s.
Industry Alliance for Multimodal Connectivity & Logistics for Growth

- New industry-led but informal platform.
- Created in November 2016.
- The alliance aims at enhancing the dialogue between the various actors of the maritime and logistics’ industries (covering multimodal transport).
- The aim is to find a common approach where possible in order to better influence the policy-making process.
R&D-related cooperation

- Waterborne Technology Platform
- Vessels for the Future Research Association
Waterborne Technology Platform

- Created in 2005 – Associations-based platform
- Resulting from the R&D Committee of the M.I.F.
- Various maritime industry associations
- To update the European Commission’s agenda on research, development and innovation
- Background is safety and environmental agenda
- Research & Strategic Agenda, Vision 2030
- Subgroups
  - Transport / Blue growth / Infrastructure & logistics
Vessels for the Future

- European Research Association (legal entity)
- Created in 2014
- Mix of companies, associations, research institutes & academic organisations
- The aim is to obtain a contractual Public Private Partnership with the European Commission
- To stimulate investments in future ship innovation
- RDI road map on various topics (energy management, hull/water interaction, safety, etc).
Assessment

- Together we are stronger
- More (political) weight => More changes to be heard
- More influence on the EU institutional agenda

- But
- Many different interests within the various fora make it difficult to find a compromise and to cooperate
- Preparing good documents and papers still require lobbying and communication => room for improvement
Thank You

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