



# LeaderSHIP 2030 - Verso una nuova strategia europea per le industrie marittime

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## CONTESTO

Scopo di questa posizione politica è invitare la Commissione europea a lanciare una Strategia industriale europea "LeaderSHIP 2030" per le industrie marittime. Per industrie marittime si intendono la cantieristica navale, l'ingegneria marittima e la produzione di attrezzature marittime.

Questo documento fa seguito ai dibattiti tra le regioni membro della CRPM, animati dalla Regione della Finlandia Sudoccidentale, e alle consultazioni con l'associazione Sea Europe.

Gli altri elementi che hanno contribuito alla sua stesura sono di seguito elencati:

- La relazione del Comitato europeo economico e sociale (CESE) "[La strategia LeaderSHIP 2020 - una visione per il settore delle tecnologie marittime: verso un settore marittimo innovativo, sostenibile e competitivo nel 2020](#)" giugno 2017, alla quale la CRPM ha contribuito;
- Lo studio della Commissione europea sulle tendenze della globalizzazione in materia di cantieristica e prodotti per la nautica ([EC Study on trends in globalisation in shipbuilding and marine supplies - Consequences for European Industrial and Trade Policy](#)) pubblicato nel 2017;
- Continuo scambio di informazioni con il Comitato delle Regioni, che sta lavorando alla relazione su "Una nuova agenda europea sulle industrie marittime" che verrà presentata per approvazione alla sua Commissione Risorse Naturali il 27 marzo 2019.

## I MESSAGGI CHIAVE

La CRPM:

- Sottolinea l'incertezza del futuro economico delle industrie europee come già illustrato nella relazione LeaderSHIP 2020, nei settori della cantieristica navale, l'ingegneria marittima e la produzione di attrezzature marittime. Nei prossimi anni questi settori saranno confrontati a una domanda globale in diminuzione ed una maggiore concorrenza internazionale;
- Ricorda l'importanza strategica di questi comparti industriali dal punto di vista dell'occupazione nelle regioni europee, e dello sviluppo di nuovi settori emergenti e strategici come le energie marine e la cantieristica navale;
- Invita l'Unione europea ad adottare la Strategia "LeaderSHIP 2030" per definire un quadro politico comune per le numerose politiche europee relative alle industrie marittime. Questa strategia si tradurrà in una comunicazione della Commissione europea. Come per la precedente strategia LeaderSHIP 2015, i livelli più alti della Commissione europea dovranno monitorare attentamente l'implementazione della nuova strategia.
- Ritiene che la futura strategia dovrà prevedere obiettivi ambiziosi in termini di protezione degli interessi europei attraverso la politica commerciale dell'UE, gli aiuti di stato e le regole sulla concorrenza; formare e attirare i lavoratori, evitare il dumping sociale, innovare per raggiungere livelli di maggiore sostenibilità e competitività del settore marittimo;
- Ritiene che la nuova strategia dovrà svolgere un ruolo fondamentale nel facilitare le sinergie tra gli investimenti cofinanziati dalle regioni e i programmi europei gestiti a livello centrale;
- Ribadisce e sostiene la richiesta del Comitato europeo economico e sociale, del Comitato delle Regioni, e dell'associazione Sea Europe di adottare una Strategia "LeaderSHIP 2030".

## ANNEX

Maritime industries are a key economic sector in CPMR Member Regions. Shipbuilding, marine energies, maritime engineering and manufacturing are important components of the maritime economy with thousands of jobs at stake. According to the [2018 Annual Economic Report on EU Blue Economy](#), 262,000 people were directly employed in the shipbuilding and ship repair sector in the European Union in 2016. In total, the sector employs around 500,000 people also taking into account the sub-contracting companies.

European maritime regions are implementing ambitious actions to support the development of these industries. As reflected in Smart Specialisation Strategies, these actions involve both support to economic sectors, as well as support to economic interactions between these sectors, via support to key enabling technologies, shared infrastructures or the adaptation of workers' skills.

The LeaderSHIP 2020 report currently acts as a European strategy. This report, to which the CPMR actively contributed, defined 19 recommendations in the areas of employment and skills, improving market and fair market conditions, access to finance, and research and development and innovation.

These recommendations, however, have not been the subject of a Communication from the European Commission. Their implementation largely depends on the spontaneous mobilisation of socio-economic actors. As the EESC study showed, only 25% of these recommendations have been implemented in 2017.

In view of the challenges facing the maritime industries in the coming years, it is necessary to provide a new impetus to implement LeaderSHIP 2020.

The European Union must now define an ambitious future strategy for its industries and industrial maritime employment in its territories. This strategy should make it possible to define objectives shared by the European institutions, socio-economic actors and regions, and to guide the mobilisation of investments at all levels.

### 1. For a holistic European Maritime Industrial Strategy

#### **European industry will face increased international competition in the coming years**

The [EC Study on trends in globalisation in shipbuilding and marine supplies - Consequences for European Industrial and Trade Policy](#), published in 2017, indicates an uncertain economic future for European industries. In the coming years these will face a weak global demand and increased international competition, in particular from Asia. China has for instance identified "Advanced marine equipment and high-tech vessels" as one of the priority sectors in its "[Made in China 2025](#)" strategy. This is new and it will generate increased competition on Europe's current specialisation sectors such as cruise ships.

According to the European Commission's study, "*the maritime technology industry in Europe cannot feel safe or be complacent and needs to take action now. The next 10 years are likely to determine whether the European shipbuilding and marine supply chain industry can survive and grow or will decline and fail*".

### **Maintaining an industrial capacity in Europe is fundamental**

Maintaining jobs and maritime industrial know-how in Europe is fundamental, not only because of the importance of current maritime industrial employment in Europe's territories, but also for the development of emerging industrial sectors.

Traditional shipbuilding industries are indeed sources of skills and infrastructures that are essential for the development of marine energies. Engineers and workers able to design and build ships have skills that are also useful to the manufacturing of industrial elements for marine energies. Space and machinery available to shipyards are also used for the development of industrial activities related to marine energy.

European maritime industrial know-how is also fundamental for defence industries, in a context where the development of military navies will be a key geopolitical element for the future of Europe.

### **Defining shared objectives for a holistic European Maritime Industrial Strategy**

European policies concerning maritime industries are numerous. They include, inter alia, European policies in the areas of competition, trade, research and innovation, energy and climate, cohesion, training, and access to finance.

Defining a holistic European strategy is necessary to define common objectives for all these policies. This is what the European Union has done for sectors such as automotive, and space sector. Like these sectors, the maritime industry must have a specific European strategy.

The new European strategy will also need to result in a Communication from the European Commission and be monitored at the highest level of the European Commission. The fact that the LeaderSHIP 2015 Strategy was monitored by a Task Force involving several European Commissioners was a key factor in the success of its implementation.

## **2. Strategic objectives for European maritime industries**

The new European strategy must make it possible to understand how the horizontal elements of European Industrial Strategy adapt to the specific context of the maritime industries. The strategy should support the strategic objectives below.

### **Promote European interests in a global context**

The EU Trade Policy and free trade agreements should create opportunities for the European maritime construction sector and the maritime services sector in terms of access to foreign markets. Unlawful subsidies should be addressed in competition-specific chapters to ensure that trade in these sectors takes place in a fair and transparent setting.

State aid and competition rules should reflect the needs of a competitive maritime industry and other maritime technologies. The situation and the need for diversification in the traditional maritime sector as well as the will to address urgent societal challenges, like climate protection, can justify more flexibility in terms of public support, as well as the need to facilitate the strengthening of European companies able to compete at global level.

### **Train and attract workers, and avoid social dumping**

Strengthening workers' skills and increasing the attractiveness of maritime industrial jobs, notably to women, is essential. The maritime industrial sector demands wide-ranging and high-level skills.

Strong contributions to these objectives are expected from the Erasmus programme, the Blue Careers programme, and the on-going blueprint exercise on skills in the area of maritime industries. This blueprint exercise should result in proposals for innovative initiatives that should inspire further developments of the EU Skills agenda.

In parallel, it is necessary for EU rules regarding the terms and conditions of employment to be applied to posted workers to be enforced, with the aim to guarantee that these rights and working conditions are protected throughout the EU, and to ensure a level playing field and avoid "social dumping" where foreign service providers can undercut local service providers because their labour standards are lower. The revision, adopted in June 2018, of the 2016 European Directive on posted workers must provide an important contribution to this.

### **Innovate for more sustainability and competitiveness**

Constant support for innovation is key to enable European industries to face new challenges, and to keep or acquire leadership at global level.

In this perspective, European industries need to tackle important challenges in terms of sustainability. Reduction of carbon emissions, of waste, as well as greater involvement in circular economy models, are among these challenges.

European industries will also need to adapt to digitalisation, which will affect and redefine the maritime industry sector and will cause major implications for European shipping companies, maritime technology companies and system providers, as well as information technology companies.

Autonomous shipping is another example of future development that challenges the traditional maritime industry sector.

Finally, diversification of industrial activities is also a key priority, notably via the development of activities in the field of marine energies by shipyards companies.

## **3. Support access to financing in synergy with Regions**

The new European Strategy for Maritime Industries should set objectives and be used to facilitate synergies between investments co-financed by the regions and European centrally-managed programmes.

Regions need leeway to invest in maritime industries, and public intervention is necessary to accompany the development of maritime sectors and ensure territorial development.

For the next period, the contribution of future smart specialisation and operational programmes of Cohesion Policy to the financing of maritime industries will be very important. The European Commission proposal to heavily prioritise ERDF funding on policy objective 1 (innovation, digital, SMEs) and policy objective 2 (climate, energy, and low carbon) will indeed enable regions to support maritime industries to a large extent.

European centrally-managed programmes should facilitate the implementation of priorities set by regions in Smart Specialisation Strategies and operational programmes' objectives in the areas covered in the new industrial strategy.

Synergies between Horizon Europe and regions' policies should be strengthened in this perspective. Horizon Europe will potentially invest massively in research and innovation in the field of maritime

industries via its three pillars. Within its second pillar, Horizon Europe will be able to support investments via its clusters “Global Challenges and Industrial Competitiveness” and “Digital and Industry”; “Climate, Energy and Mobility”. More maritime specific priorities for Horizon Europe should however be defined. These priorities should take inspiration from the objectives to be set in the future new European Strategy for Maritime Industries, and from Smart Specialisation Strategies.

Synergies with the regions for better access to finance is very much needed as well. The future InvestEU and Blue Invest platform launched by DG MARE, which are very welcome, should work in synergy with the regions, which are already implementing investment vehicles providing support in terms of access to capital to maritime industries at regional level. It is positive that the European Commission explicitly foresees the involvement of “maritime regions” in the BlueInvest platform<sup>1</sup>.

In parallel, the implementation of state aid rules must be facilitated. ESI funds should be treated in the same way as other European programmes focused on investment, such as Horizon 2020 and the EFSI. There should for instance not be any need for state aid verification for aid granted in line with the objectives of an ERDF operational programme which has been negotiated with and adopted by the European Commission.

Finally, sea basin and macro-regional strategies, as well as Interreg programmes will also be important in providing support to the maritime industry sector. Their complementarity should be strengthened via better synergies with the regions in the definition of priorities for each programme.

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<sup>1</sup> In the coming months, the European Commission will launch a “Blue Invest platform”. This platform will set up and operate a blue “investment and innovation community”, bringing together investors and businesses, provide coaching services to SMEs to become investment-ready and to close business deals with investors, and develop suggestions for a new European fund. [Terms of reference](#) of the call launched by DG MARE indicate that these activities should involve “investment vehicles set up by public bodies (in particular by maritime regions)”.



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**La Conferenza delle Regioni Periferiche Marittime d'Europa ([www.crpm.org](http://www.crpm.org)) riunisce circa 160 regioni appartenenti a 25 Stati membri dell'Unione europea e ad altri stati.**

La CRPM rappresenta quasi 200 milioni di cittadini ed agisce a favore di uno sviluppo più armonioso del territorio europeo.

Opera sia come think tank ed effettua un'azione di lobbying per conto delle Regioni. Il suo principale obiettivo verte sulla coesione sociale, economica e territoriale, le politiche marittime e l'accessibilità.

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