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The Shipbuilding and Maritime Technology Pact for Skills

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SEA Europe
Shipyards' & Maritime Equipment Association

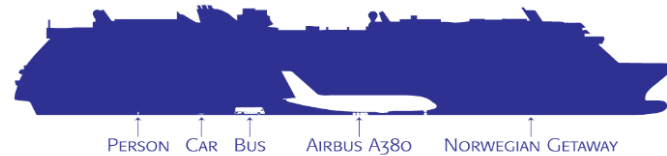
The European Shipbuilding and Maritime Technology Industry

- **+300 Shipyards and 22.000 equipment and service suppliers** (€ 125bn annual production value)
- **+1million jobs** linked to building + repair of ships and offshore structures
- **Highly skilled workforce** (35% HE/Engineering, 60% VET and technical education)
- **Global leader** in the design, construction, maintenance and retrofitting of **high- tech vessels** (civil and military)
- **Front runners** in delivering the most advanced **maritime equipment and tech** (+50% global sales)
- **Strategic manufacturing industry for Europe**
 - Smart and sustainable mobility & decarbonisation of waterborne transport
 - Defence and Security
 - Offshore strategy

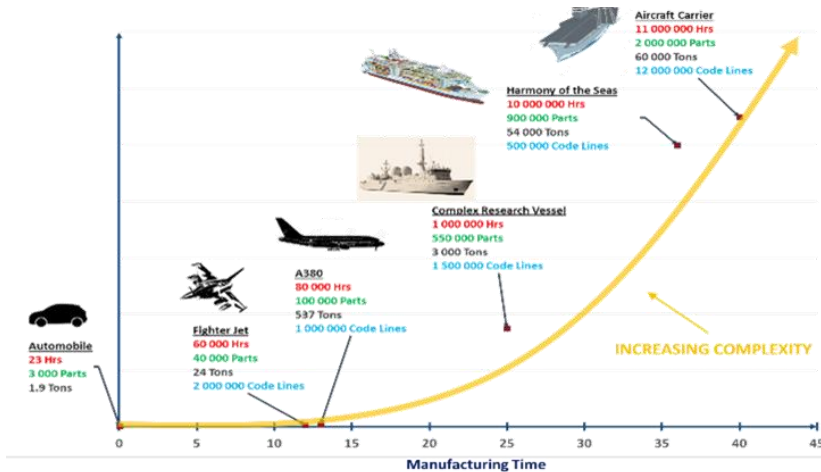


The European Shipbuilding and Maritime Technology Industry

Complexity, size and uniqueness of the product make a difference on the building process, work organisation and skills requirements



PERSON CAR BUS AIRBUS A380 NORWEGIAN GETAWAY



- Specific regulatory requirements/environment (high seas, ECAs, offshore, arctic..)
- **Each vessel is a prototype**, hardly built in series!
- **Building time: 24 to 48 months**
- **Number of suppliers in 1 project: 100 to 1.000**
- **Number of workers in 1 project:**
 - 6.000 to build 1 cruise ship,
 - From 500 to 2.000 for a repair project (3 to 6 weeks projects)

Current challenges in the Shipbuilding & MT sector

- **Covid-19 crisis:** decrease of **+80% of new orders for European companies**. No recovery forecasted until 2023-2024. High risk of losing critical capabilities, talent and knowhow.
- Need of adapting skills to the **Shipyard 4.0** and **digitalisation of design and production** processes
- *Green Deal* and industry's goal and responsibility to deliver the first **zero emission ships by 2030**
- An **ageing workforce**. 40% of the current workers will be retiring in the next 10 years.
- High **mobility** of workers: need to ensure a **highly skilled EU-wide supply chain**
- **Scarcity of sectoral training** offer and the difficulty to adapt it to the fast-changing needs of the industry
- **Company training and in-house "shipbuilding schools"** to overcome the shortage of training and skills
- **Difficult to attract talent** to the sector and to find people with sectoral skills.

Shipbuilding Pact for Skills: ATTRACT, TRAIN AND RETAIN TALENT to reinforce the competitiveness of the industry by

- Upskilling and reskilling 200.000 workers (7 % employees/year until 2030)
- Attracting 230.000 new talents
- Mobilising 1 bn€ of public/private investment



- ✓ Strong industry & Social partners engagement
- ✓ EU wide (16 countries)
- ✓ Main Shipbuilding Groups + SMEs
- New-building
- Repair and Retrofitting
- Civil and Military
- ✓ Regions and Clusters
- ✓ Education providers
- ✓ EU Sectoral Social Partners

Background – Where do we come from?

The Social Dialogue Committee on Shipbuilding engaged in numerous projects, studies and discussions on SKILLS, TRAINING and ANTICIPATION OF CHANGE since 2003

European Shipbuilding Social Dialogue Committee



HR Research Study:
“Demographic Change & Skills Requirements
in the
European Shipbuilding & Ship Repair Industry”

Authors: Pieter 't Hart / Dick Schotte




Identifying the Actors in the Shipbuilding Sector in View of Setting up a European Council on Employment and Skills

Final Report (ref. 23760 v02)

31st October 2012

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SEA Europe
Ship & Marine Equipment Association

industriAll
EUROPEAN TRADE UNION

EVOLUTION OF SUPPLY, EMPLOYMENT AND SKILLS IN THE EUROPEAN MARITIME TECHNOLOGY SECTOR



SEA Europe

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With the Support of the European Commission

Final Report of the EU-Funded Project “Creating a European Skills Council for the Maritime Technology Sector” (2014-2016)



Forecasting trends & challenges for a 4.0 Shipbuilding Workforce in Europe

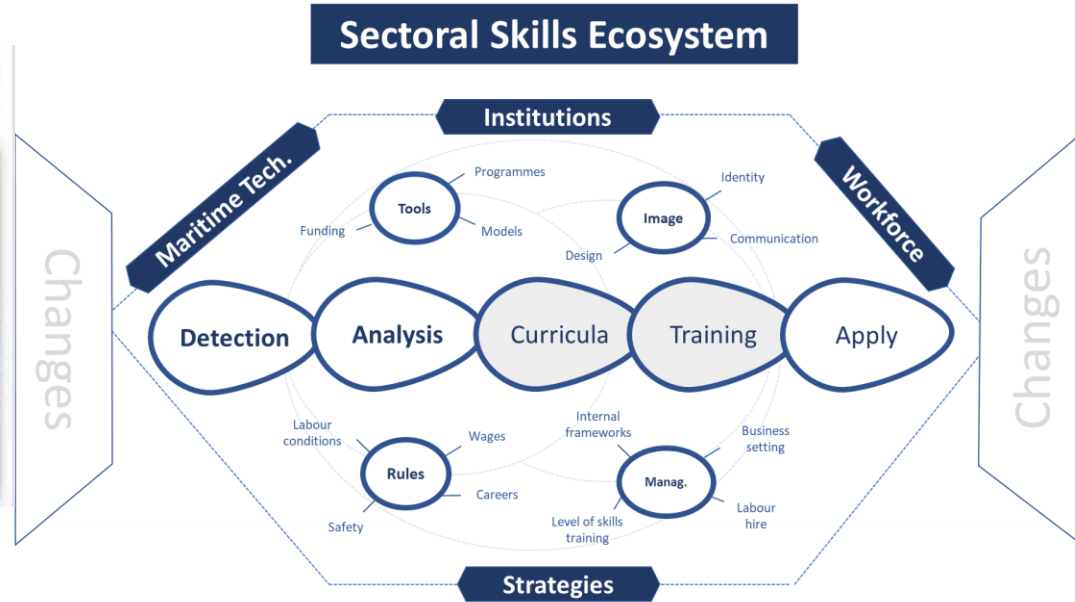
2020



Co-funded by the Erasmus+ Programme of the European Union



The Pact builds on USWE Project's Methodology and Outcomes



- State of the Art Analysis
- Forecast 4.0
- Results of Skills Survey
- Booklet on VET Career Opportunities in Shipbuilding
- Methodology for identification of skills gaps and updating curricula matching industry needs

Pact for Skills: 4 Pillars for Action and Dedicated Working Groups:

1. Skills Analytics:

- **Gather intelligence** at EU level on sectoral demographics, skills; employment and training and **forecast future needs**

Based on available data at EU, national and company level, the partners will gather intelligence on current sectoral demographics, skills, employment, and training and will forecast future needs. This exercise will be done based on the methodology developed by USWE Project, developed by the EU-Social Partners.

2. Improve sectoral education and training offer

- Develop a sectoral **EU Qualifications Framework** for the recognition of training, skills and qualifications -> facilitate mobility and contracting of workers and the cooperation between education institutions at transnational level
- Develop a **European network of sectoral VET** centres which can share information, develop joint training courses and facilitate the mobility of students –in close relation with companies
- Develop **Master and specialisation programmes** and modules at HE institutions to support the specialisation in shipbuilding / maritime tech domains

Pact for Skills: 4 Pillars for Action and Dedicated Working Groups:

3. Up and re-skill current workforce

- Develop and pilot **common training for up and re-skilling workers** (special courses, micro-credentials): e-learning + WBL
- Develop European **MOOCs (Massive Online Open Courses)** open to workers in several companies and countries:
- Promote and facilitate **company and intercompany training**
- Identify best practices and financing possibilities to facilitate **training from big Companies to SMEs and suppliers.**
- **Identify financing** possibilities

4. Attract talent to the industry

- Promote and facilitate **Apprenticeships** in the Industry (including SMEs)
- Coordinate collective campaigns and actions for the **promotion of career opportunities**, international student contests, etc

Pact for Skills Future Funding

Erasmus + Calls

1. Alliances for Innovation. Alliances for Sectoral Cooperation on Skills (Pact for Skills)
2. Centres of Vocational Excellence