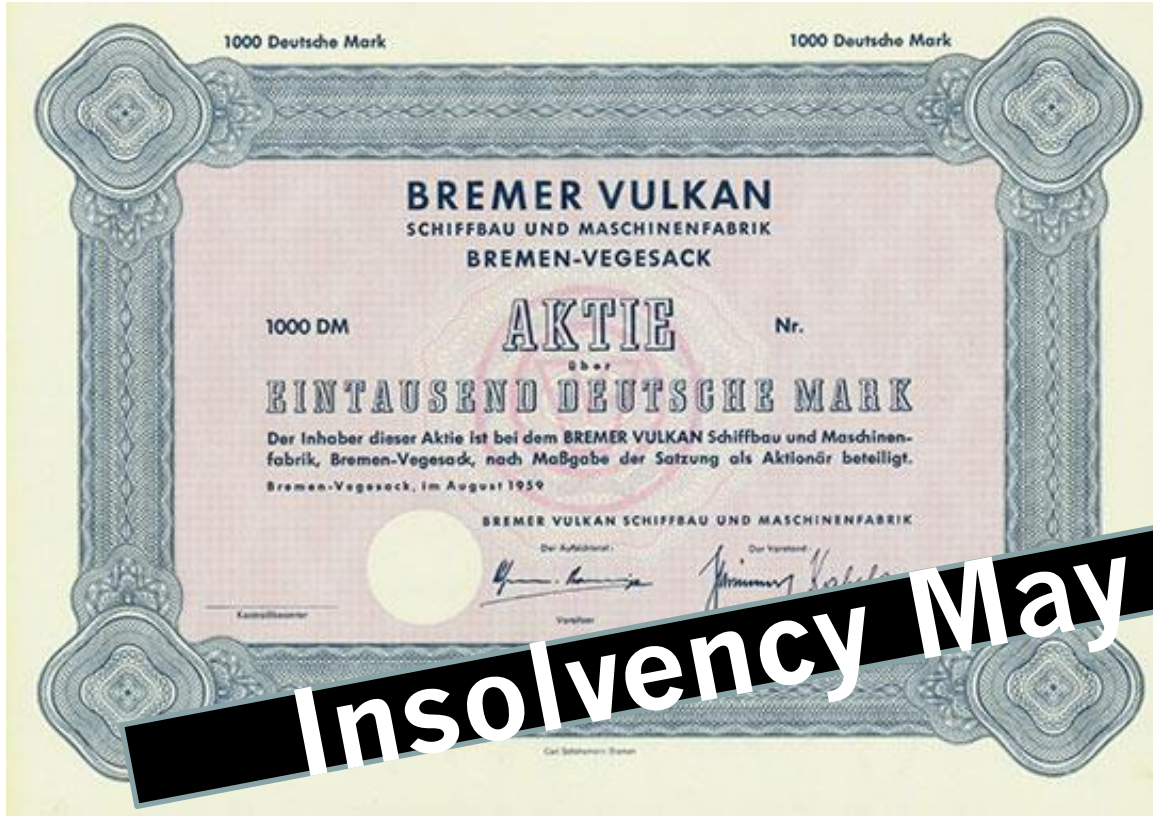


Naval Shipbuilding in Europe

A brief overview

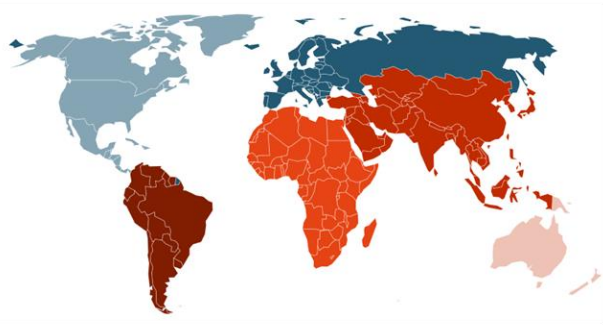
25 years ago - a historical reference...



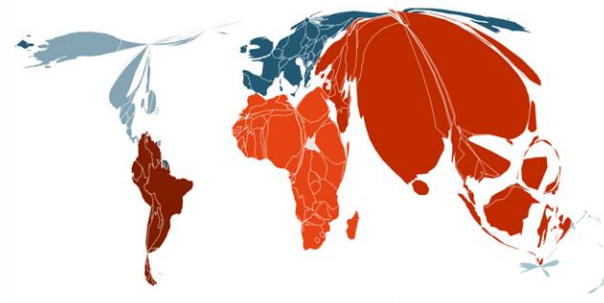
Insolvency May 1996

We look all at the same world...

... but the world looks different depending on **what criteria one is based on.**



Classic view
(according to Tom Patterson)



Where most people live
(2021)



Emission giants
(2019 by CO₂-emissions)

We look all at the same world...

... but the world looks different depending on **where you live**.



From a world atlas for German pupils

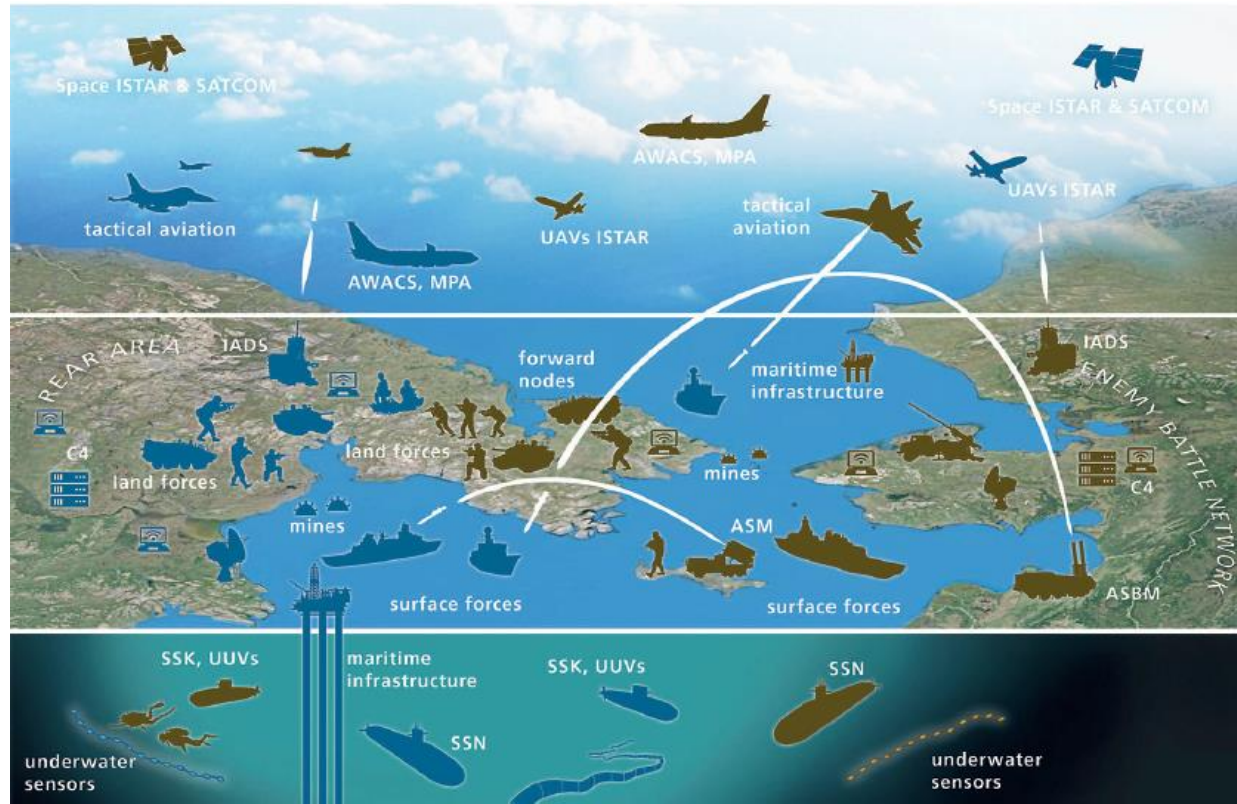


Seen in a chinese hotel

To talk about European Naval Shipbuilding means to talk about...

- ... industrial „overcapacities“
- ... (protected) national markets
- ... inconsistent export regulations
- ... options for consolidation
- ... uncoordinated (cross-border) cooperation
- ... last but not least: employees

To talk about European Naval Shipbuilding means to talk about the role of Navies in future military strategies



Europe's navy in comparison (2020)

Country/ Region	Frigates	Destroyers	Corvettes	Submarines	Mine Warfare	Aircraft Carriers	Total Vessels	Coastline (km)
China	46	50	72	79	36	2	285	14.500
USA	(0)	92	21	68	8	11	200	19.924
EU (+UK)	(105)	21	32	68	164	6	485	66.000

Major naval shipyards in Europe - selected companies

Company	Country	Revenue 2019 (in billion Euro)	Employees 2019	Ownership
Babcock	UK	5,19 (Marine 1,065)	3.5000	Public company
BAE Systems	UK	23,31 (15% maritime)	83.000 (16.000 maritime)	Public company
Chantiers de l'Atlantique	France	1,867	3.227	State owned 84,3 % French state; 11,7 % Naval Group
Damen	Netherlands	2,4	13.000	Private Company
Lürssen Group	Germany	1,087	2.700	Private Company
Naval Group	France	3,7	11.653	State owned 62,25 % French state; 35% Thales
Fincantieri	Italy	5,849	19.823	State owned(public 71,32 CDP Industria S.p.A
Navantia	Spain	1,11	3.800	State owned 100% SEPI
Naviris	Italy, France			50% Naval Group, 50% Fincantieri
SAAB Kockums AB	Sweden	3,49	1.157 (17,420 at Saab)	Public company 100% Saab Group
ThyssenKrupp Marine Systems (TKMS)	Germany	1,75	6.013	Public company 100% ThyssenKrupp
Remontowa Shipbuilding	Poland	0,1	442	Private company 100% Remontowa Holding SA

Major naval shipyards in Europe - Portfolio

Company	Country	Submarines	Patrol Boats	Corvettes	Frigates	Mine warfare vessels	Aircraft Carriers	Naval support
Babcock	UK	X	X	X	X	X	X	X
BAE Systems	UK	X	X	X	X	X	X	X
Chantiers de l'Atlantique	France		X	X	X	X	X	X
Damen	Netherlands	X	X	X	X	X		X
Lürssen Group	Germany	X	X	X	X	X		X
Naval Group	France	X	X				X	
Fincantieri	Italy		X	X	X	X	X	X
Navantia	Spain	X	X	X	X	X	X	
Naviris	Italy, France	X	X	X	X			
SAAB Kockums AB	Sweden	X	X	X	X			
ThyssenKrupp Marine Systems (TKMS)	Germany	X		X				
Remontowa Shipbuilding	Poland		X					X

European variety of ship types: The example of submarines

- Appr. 34% of all spending for new construction naval platforms in Europe will go toward submarines.
 - Europe: 60bn US\$ over the next two decades
 - 75% of that will spend by UK and France)
- 10% of all European naval platforms purchased by 2040 will be for submarines.
- Similar to other segments of the naval fleet there are different European shipyards involved in submarine production – competing with different sub-types:

Country	Preferred builder	Sub Acquisition Cost as % of Country's Total Naval Platform Cost (2020-2040)
France	Naval Group	65
UK	BAE Systems	59
Germany	TKMS	7,5
Norway	TKMS/Kongsberg	82
Sweden	SAAB	53
Netherlands	SAAB/Damen	23
Poland	tbc	18
Italy	Fincantieri	14
Spain	Navantia/Naval Group	20
Romania	tbc	35

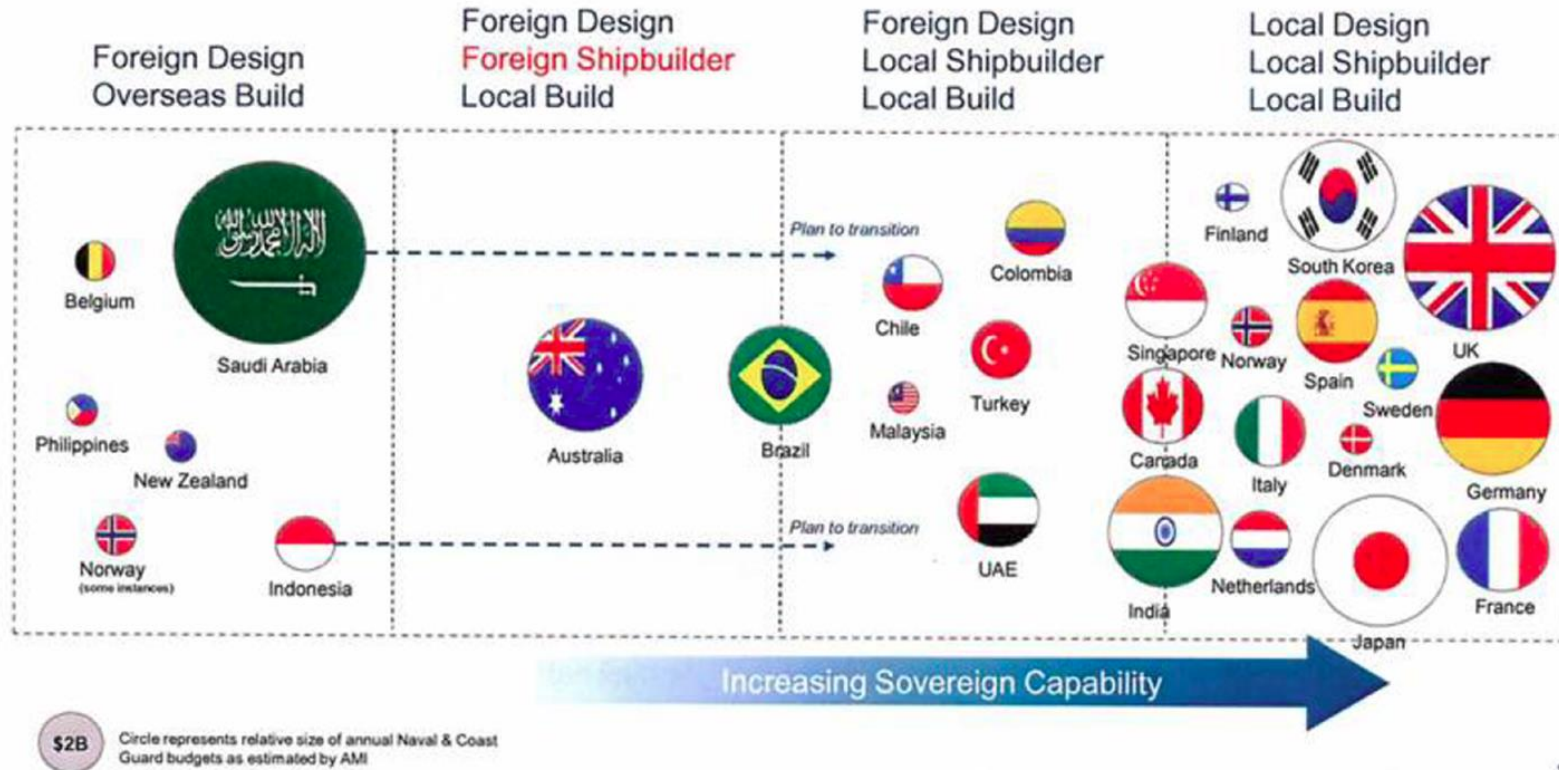
Uncoordinated (cross-border) cooperation

- On EU level, there is the European Maritime Force, 'a non-standing, pre-structured, multinational maritime force', and the Spanish–Italian Amphibious Battlegroup.
- Co-operation and capability integration on bi- and multi-lateral level has also developed, including maritime domain awareness regimes like
 - Surveillance Co-operation Finland–Sweden,
 - the Sea Surveillance Co-Operation Baltic Sea,
 - the European Defence Agency's long-running Maritime Surveillance Project,
 - naval arrangements such as the UK-led Joint Expeditionary Force, the Swedish–Finnish Naval Task Group, the Belgian–Dutch BeNeSam naval integration etc..

Uncoordinated (cross-border) cooperation

- In 2018, 13 multinational armaments programs were coordinated and managed by OCCAR, including three naval programs
 - Frigate Europee Multi-Missione Programme - FREMM
 - Logistic Support Ship - LSS
 - Multipurpose Patrol Ship Programme - PPA
- At the end of 2020, the EDA managed 123 ad hoc R&T and capability programmes and projects as well as some 240 other activities.
 - European Patrol Corvette (IT, France, Spain, Greece)

Securing Sovereign Capabilities – on national or European Level?



Naval Shipbuilding in Europe

THNAK YOU