4 DECEMBER 2025

Press release

Is the new EU Economic Security Doctrine an Economic Complacency Doctrine?

SEA Europe warns of a missed opportunity for Europe's maritime manufacturing industry

SEA Europe, the voice of European shipyards and maritime equipment manufacturers (known as maritime manufacturing industry), acknowledges an accurate diagnosis of Europe's global economic security risks in the European Commission's new Economic Security Doctrine. Nonetheless, SEA Europe is very disappointed that the Communication fails to move beyond well-known observations and does not provide any actionable solutions for strategic industrial sectors such as the maritime manufacturing industry.

For more than three years, the geopolitical tensions and economic disruptions affecting global markets have been evident. The risks highlighted in the Economic Security Doctrine – ranging from strategic dependencies to state-driven market distortions – have long been recognised and repeatedly documented. For shipbuilding, there have already been acknowledged for almost 4 decades. Yet, this new communication merely reiterates the known concerns without addressing their real-world implications for Europe's industrial base.

While this Doctrine refers to risks affecting also shipbuilding, especially third-country non-market policies and practices that lead to distortions in global and regional markets, it offers no targeted measures, no concrete proposals to restore fair competition, and no (trade defence) tools to mitigate the impact of third-country state interventionism on Europe's strategic industries. For shipbuilding, in particular, the European Commission fails once again to offer a solution for the industry's longstanding and known trade defence gap nor does it make any attempt to make Regulation (EU) 2016/1035 on protection against injurious pricing of vessels applicable. This trade defence instrument was designed to address the specificities of the shipbuilding sector by imposing a levy on foreign builders of injuriously priced vessels causing injury to the European shipbuilding industry. However, this regulation is currently ineffective as its entry into force is conditional upon the ratification of the OECD Shipbuilding Agreement of 1994.

This manifest failure is especially concerning given that the European Commission has itself recognised shipbuilding and maritime equipment manufacturing as a strategic ecosystem for Europe's resilience, competitiveness, and security. Moreover, the European Commission is currently preparing a new Industrial Maritime Strategy aimed at strengthening the industry's competitiveness. Ignoring the international trade dimension – and the concrete threats the maritime manufacturing industry faces – risks undermining the effectiveness of that future strategy. Europe's maritime industrial value chain plays a critical role in defence, energy transition, transport security, Blue Economy, and technological leadership. Failing to address external distortions and unfair practices does not just jeopardise industrial competitiveness; it weakens Europe's ability to safeguard its own strategic autonomy.

"For these reasons, SEA Europe considers today's Economic Security Doctrine to fall short of what the current geopolitical context requires. Instead of offering a robust response to the structural challenges our industry faces, the document risks becoming an Economic Complacency Doctrine – a strategy that recognises the dangers but fails to act on them," says Christophe Tytgat, SEA Europe's secretary general.

SEA Europe therefore urges the European Commission to ensure that the forthcoming Industrial Maritime Strategy includes strong and concrete trade-related measures to restore a level playing field and protect Europe's ability to compete, innovate, and thrive in an increasingly distorted global market, considering SEA Europe's submission to the Call for Evidence for this Strategy.

In particular, SEA Europe reiterates its request to the European Commission to establish an EU Maritime Economic Security Office within the European Commission to monitor strategic economic risks and threats to supply chain resilience in the maritime sector, including monitoring developments in global shipbuilding markets.

Background Note:

SEA Europe represents close to 100% of the European shipbuilding industry in 17 nations, encompassing the production, maintenance, repair, and conversion of all types of ships and floating structures, commercial as well as naval, including the full supply chain with the various producers of maritime systems, equipment material, and services. As an NGO observer at the International Maritime Organisation (IMO), CESA represents the shipbuilding industry and its supply chain from EU Member States, Norway, and Turkey.

For further information please visit www.seaeurope.eu or contact: Christophe Tytgat, Secretary General ct@seaeurope.eu