

CANADA'S NATIONAL SHIPBUILDING STRATEGY

2019
ANNUAL
REPORT



Government
of Canada

Gouvernement
du Canada

Canada

CANADA'S NATIONAL SHIPBUILDING STRATEGY



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MINISTER'S MESSAGE



I am pleased to present the fourth annual report on Canada's National Shipbuilding Strategy (NSS), covering 2019.

Along with my colleagues, the Honourable Harjit S. Sajjan, Minister of National Defence, the Honourable Bernadette Jordan, Minister of Fisheries, Oceans and the Canadian Coast Guard, and the Honourable Navdeep Bains, Minister of Innovation, Science and Industry, I am proud to lead the renewal and maintenance of the Royal Canadian Navy (RCN) and Canadian Coast Guard (CCG) fleets, while creating jobs and generating significant economic benefits to communities across Canada.

As you will read in this year's report, 2019 was marked by important achievements, including the delivery of the first 2 large ships built under the NSS, the first and second Offshore Fisheries Science Vessels, to the CCG.

We also announced further investments in the CCG fleet, with up to 24 additional large ships. This includes up to 16 multi-purpose vessels to be built at Seaspan's Vancouver Shipyards, 2 adapted Arctic Offshore Patrol Ships (AOPS) at Irving Shipbuilding Inc., as well as 6 new program icebreakers to be built at a third Canadian shipyard. The process to select the third shipyard is underway.

In 2019, the Government of Canada made progress toward renewing the RCN fleet, by selecting a design for the future Canadian Surface Combatants. The RCN's first AOPS also began sea trials, and we signed new contracts with three Canadian shipyards to maintain the Navy's existing Halifax-class frigates until the Canadian Surface Combatants are delivered.



The NSS continued to help stimulate the Canadian economy, with approximately \$3.3 billion in new contracts having been awarded to Canadian companies in 6 different provinces in 2019. Of note, NSS contracts issued between 2012 and December 2019 are estimated to contribute over \$17.04 billion (\$1.54 billion annually) to gross domestic product, and create or maintain more than 15,500 jobs annually, through the marine industry and its Canadian suppliers from 2012 to 2022.

Progress and successes are no doubt being achieved. But shipbuilding is highly complex, and we must continue to work with shipyards to address ongoing challenges facing the NSS, including costs, timelines and productivity.

The Government of Canada remains firmly committed to the NSS, and we are working hard to ensure it continues delivering important benefits for Canada.

The Honourable Anita Anand

Minister of Public Services and Procurement



THE YEAR IN REVIEW

Large ship construction

In 2019, approximately \$0.8 billion worth of new construction contracts were announced or awarded to Seaspan's Vancouver Shipyards (VSY) and Irving Shipbuilding Inc. (ISI).

These contracts are estimated to contribute more than \$1.04 billion (\$261 million annually) to gross domestic product (GDP), and create or maintain more than 2,550 jobs annually, through the marine industry and its Canadian suppliers from 2019 to 2022.

Progress at Seaspan's Vancouver Shipyards

- In May 2019, the Government of Canada (GC) announced that VSY will build up to 16 new multi-purpose vessels for the Canadian Coast Guard (CCG).
- The first Offshore Fisheries Science Vessel (OFSV), the Canadian Coast Guard Ship (CCGS) Sir John Franklin, was delivered to the CCG in June 2019.
- The second OFSV, CCGS Capt Jacques Cartier, was delivered in November 2019.
- Construction continued on the third and final OFSV, the future CCGS John Cabot, which is expected to be delivered in summer 2020.
- Construction continued on the initial early blocks of the first Joint Support Ship (JSS) for the Royal Canadian Navy (RCN).



Progress at Irving Shipbuilding

- In February 2019, the GC and ISI selected Lockheed Martin Canada for the design of the 15 new Canadian Surface Combatants (CSC) that will be built by ISI. The vessels will be based on the BAE Systems Type 26 global combat ship.
- In May 2019, the GC announced ISI will build 2 additional Arctic and Offshore Patrol Ships (AOPS) that will be customized for the CCG.
- Construction also began on the fourth AOPS in May 2019.
- In November 2019, ISI conducted initial testing at sea for the first AOPS. It is expected to be delivered to the RCN in 2020.
- The second AOPS, the future Her Majesty's Canadian Ship Margaret Brooke, was launched in November 2019.

Small ship construction

In 2019, the GC awarded approximately \$120.2 million in new small ship construction contracts to Canadian shipyards. All of this work is being performed by small and medium-sized enterprises with fewer than 250 full-time employees.

These NSS contracts are estimated to contribute close to \$69 million (\$17 million annually) to GDP, and create or maintain more than 170 jobs annually, through the marine industry and its Canadian suppliers from 2019 to 2022.



Progress during the reporting period

- In April 2019, the GC awarded a \$102-million contract to Ocean Industries Inc., of Isle-aux-Coudres, Quebec, to construct 4 naval large tugs for the RCN. Construction is expected to begin in 2020.
- In July 2019, a \$2.1-million contract was awarded to Canadian Maritime Engineering Ltd., of Port Alberni, British Columbia, to build 4 steel barges for Canadian Forces Base Esquimalt. The project is expected to be completed in 2020.
- In June and July 2019, the CCG accepted the fifth and sixth search and rescue lifeboats, the CCGS Conception Bay and CCGS Sacred Bay, into its fleet. Hike Metal Products of Wheatley, Ontario, and Chantier Naval Forillon of Gaspé, Quebec, are building a total of 20 lifeboats for the CCG (10 at each yard).
- In December 2019, the GC awarded a \$1.3-million contract to Robert Allan Ltd. of Vancouver, British Columbia, for the design of 1 new Near-shore Fishery Research Vessel for the CCG.

Repair, refit and maintenance

In 2019, the Government of Canada awarded approximately \$2.3 billion in new or amended repair, refit and maintenance contracts to Canadian companies.

These NSS contracts are estimated to contribute more than \$3.0 billion (\$758 million annually) to GDP, and create or maintain more than 7,600 jobs annually, through the marine industry and its Canadian suppliers from 2019 to 2022.

Additionally, in May 2019, the GC announced it will invest more than \$2 billion in vessel life extensions for the existing CCG fleet. This will help the CCG continue to deliver critical services while new ships are being built under the NSS.

Progress during the reporting period

- During the summer of 2019, the GC awarded 3 contracts to Seaspan's Victoria Shipyard, ISI and Chantier Davie of Lévis, Quebec, initially totalling \$1.5 billion¹, to carry out maintenance work on the RCN's Halifax-class frigates. This is part of a \$7.5-billion investment to provide necessary, ongoing maintenance for the frigates until they are retired in the 2040s.

¹This amount excludes taxes.

- In fall 2019, a competitive process was launched for the next in-service support contract for the RCN's Victoria-class submarines.
- In October 2019, the GC awarded a \$1.6-million contract to Heddle Marine Service Inc. of Hamilton, Ontario, for refit work on the CCGS Caribou Isle.
- In September 2019, the GC awarded a \$1.9-million contract to Verreault Navigation Inc. of Les Méchins, Quebec, for vessel life extension work on the CCGS Samuel Risley.
- In May 2019, the GC awarded a \$3.6-million contract to Heddle Marine Service Inc. for refit work on CCGS Pierre Radisson.
- In April 2019, the GC awarded a \$7.1-million contract to Chantier Davie for the dry-dock refit of CCGS Louis S. St-Laurent, the CCG's largest icebreaker and the flagship of its fleet.
- In February 2019, the GC awarded a \$10-million contract to Newdock St. John's Dockyard Limited of St. John's, Newfoundland and Labrador, for the refit of CCGS Hudson.
- Public Services and Procurement Canada (PSPC) continued to host marine industry workshops across the country to help advance small vessel and repair, refit and maintenance program strategies. The Marine Industry Advisory Committee held meetings in March, June and November 2019.

Selecting a third shipyard

- In August 2019, the GC launched a competitive process, through an Invitation to Qualify, to select a third Canadian shipyard as a strategic partner under the NSS. Given the urgent need to renew the CCG's fleet to ensure that essential operational requirements are met, this shipyard will build 6 new program icebreakers.
- In December 2019, the GC announced that Chantier Davie pre-qualified through the Invitation to Qualify, having demonstrated it met initial requirements related to experience, capability and capacity.
- Chantier Davie moved to the next stage in the selection process, the Request for Proposal (RFP) and evaluation stage. The selection process is expected to be completed by the end of 2020.
- This process is similar to the one used to select Seaspan and Irving as partners under the NSS in 2011.

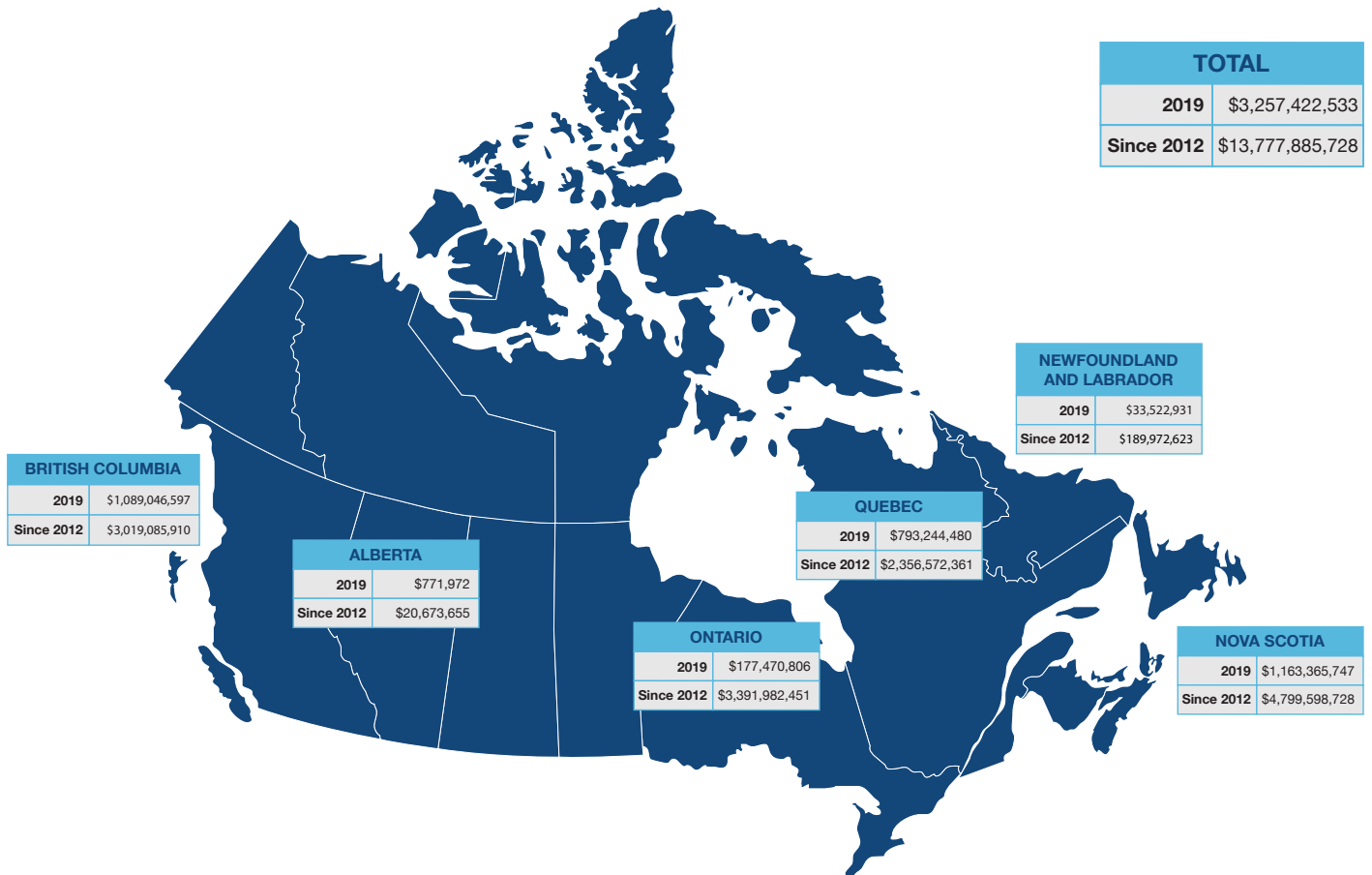




Other marine procurement projects

- In June 2019, the GC announced Chantier Davie will build 2 new ferries for Transport Canada. The new ferries will replace the Motor Vessel (MV) Madeleine, which is currently used for service between Îles-de-la-Madeleine, Quebec, and Souris, Prince Edward Island (PEI), and MV Holiday Island, 1 of 2 vessels used to provide service between Wood Islands, PEI, and Caribou, Nova Scotia.
- In February 2019, the first Request for Information (RFI) was issued to industry for the procurement of an existing light icebreaker for the Canadian Coast Guard. The second RFI, which included the draft RFP, was released in December 2019. This ship will provide critical icebreaking capacity in Atlantic Canada, the St. Lawrence, and Great Lakes region, and will supplement the CCG's existing fleet during vessel life extension and repair periods.
- Conversion work on the second and third interim icebreakers, CCGS Jean Goodwill and CCGS Vincent Massey, continued to progress at Chantier Davie. These vessels are expected to enter into service in 2020-2021, and will backfill the CCG's existing fleet during vessel life extension and repair periods to maintain critical levels of service. The first interim icebreaker, CCGS Captain Molly Kool, joined the fleet in December 2018.
- PSPC continued to work with Transport Canada, CCG, Fisheries and Oceans Canada, Environment and Climate Change Canada, Crown-Indigenous Relations and Northern Affairs Canada and Natural Resources Canada to support the Oceans Protection Plan. For example, a \$1.2-million contract was awarded to J & J Trailers Manufacturers and Sales Inc., from Scarborough, Ontario, for the acquisition of 23 boom trailers and associated services and products. A boom is a temporary flotation barrier used to contain pollution spills in marine waters. Boom trailers are used to transport booms to locations where they are needed.

Contracts awarded by province





ECONOMIC BENEFITS FOR CANADIANS

The National Shipbuilding Strategy (NSS) is revitalizing the domestic shipbuilding and greater marine industry, creating jobs, and generating socio-economic benefits and prosperity in communities across Canada. In 2019, the NSS made significant headway on this commitment.

During 2019, the Government of Canada (GC) awarded approximately \$3.3 billion in new contracts to Canadian companies under the NSS. Of that amount, approximately \$186.7 million went to small and medium-sized businesses (SMBs) with fewer than 250 full-time employees.

In addition, Seaspan's Vancouver Shipyards (VSY) and Irving Shipbuilding Inc. (ISI) continue to provide supplier development opportunities to companies across Canada to meet commitments under the Industrial and Technological Benefits Policy. Since the launch of the NSS, ISI and VSY have supported Canadian SMBs by investing close to \$735 million between 2012 and 2018. They also made additional commitments of over \$26 million to SMBs in 2019.

NSS contracts awarded between January and December 2019 are estimated to contribute more than \$4.1 billion (\$1.0 billion annually) to Canada's gross domestic product and will result in approximately 10,365 jobs annually during the period covering 2019 to 2022.

The average salary in Canadian shipyards is 30% higher than the manufacturing average. Overall, the Canadian marine industry is innovative, and supports skilled workers, with a 2.5-times higher share of employment in science, technology, engineering and mathematics fields (such as engineers, scientists and researchers) than total manufacturing.



Hundreds of Canadian businesses are securing work through contracts with the selected large vessel shipyards, which in turn supports innovation and skills development. Furthermore, the NSS is supporting the creation of a sustainable domestic supply chain.

Since the inception of the NSS, both ISI and VSY have been engaging Canadian firms through sub-contracting activities. As reported by the shipyards, to date more than \$2.27 billion in supplier development opportunities have been provided to 988 Canadian companies. SMBs have been awarded approximately 53.7% (\$1.22 billion) of the value of these opportunities, with that amount being shared among 782 firms. During 2019 alone, the value of supplier development opportunities to Canadian firms increased by \$313 million, and further, 124 new Canadian firms were engaged as suppliers to ISI and VSY.

The NSS continues to provide fair opportunities in the marine sector to businesses led by under-represented groups in the shipbuilding industry, including women, Indigenous Peoples and persons with disabilities. Partnerships are being forged with the 2 large vessel shipyards, federal departments, academic institutions, research organizations and other joint ventures to increase the participation of under-represented groups in the sector.

For example, in order to diversify the workforce available to build ships in eastern Canada, ISI has worked in collaboration with the Nova Scotia Community College and other community partners to establish the Irving Shipbuilding Centre of Excellence. The Centre currently offers bursaries



for under-represented groups in shipbuilding, and the marine sector overall, through the students' program, Pathways to Shipbuilding for African Nova Scotians, as well as Mi'kmaw and Indigenous Canadians and also has a partnership with Women Unlimited, a well-established program in Nova Scotia that seeks to optimize opportunities for women to work in the marine industry.

In order to ensure increased opportunities for traditionally under-represented groups to participate in the trades in western Canada, VSY supports job training, apprenticeship programs and the promotion of employment opportunities for Indigenous peoples and women through funding initiatives, mentorship programs and partnerships with educational institutions that focus on shipbuilding educational initiatives. VSY also has a long-term partnership with three Indigenous training and employment organizations, named the Coastal Aboriginal Shipbuilding Alliance, which seeks to deliver quality training and employment programs to people of First Nation or Indigenous descent living in Vancouver and Vancouver Island.

Industrial and Technological Benefits Policy and National Shipbuilding Strategy value proposition

Shipyards are meeting and exceeding their required commitments under the Industrial and Technological Benefits (ITB) Policy as the National Shipbuilding Strategy Value Proposition (NSS VP).

Canada's ITB Policy is playing an important role in leveraging Canada's defence and security spending to generate economic benefits for the country. Under the ITB policy, shipyards and their major suppliers are undertaking business activities in Canada equal to the value of the contract, and providing important investments into targeted areas, such as:

- work in Canada directly related to the procurement, including opportunities for Canadian suppliers
- investments in innovation through research and development activities in Canada
- skills development and training
- export opportunities

Through the Policy, hundreds of Canadian businesses are securing work through contracts with the selected large vessels shipyards, and in turn are investing in innovation and securing exports.

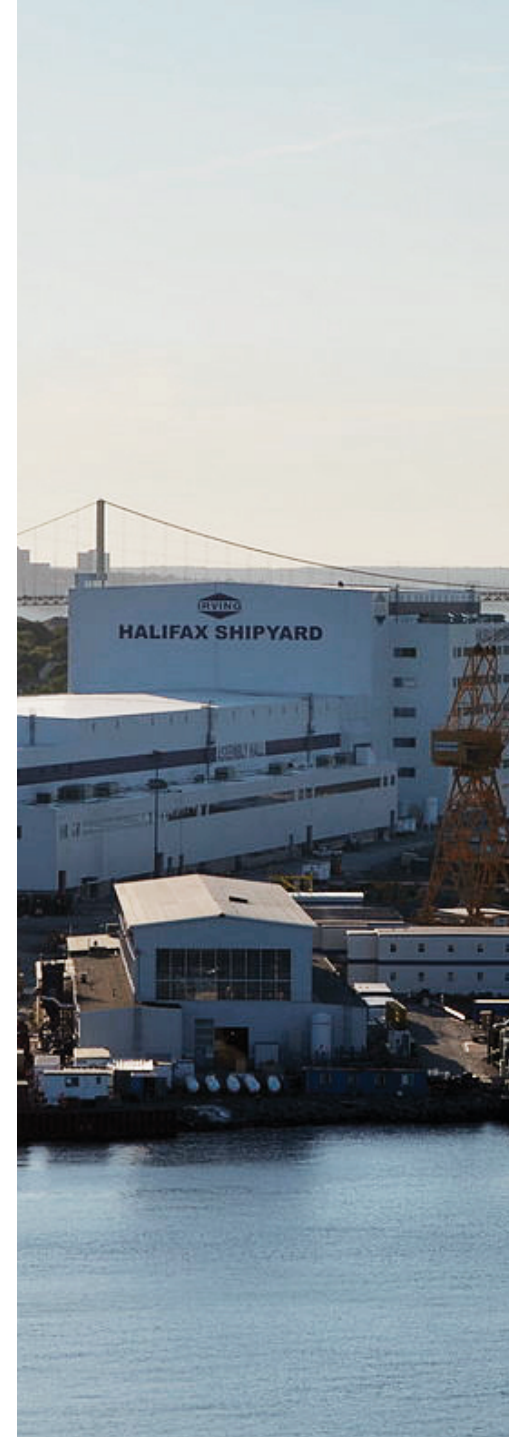
ISI has an Industrial and Regional Benefit (IRB) obligation of nearly \$4.3 billion, of which \$2.6 billion has been completed to date and another \$396.3 million is underway for the Arctic and Offshore Patrol Ships project, modernizations to the Halifax-class frigates, and the Canadian Surface Combatant definition contract.

On the West Coast, VSY is making progress on its IRB obligations for the vessels under the NSS's non-combat package, including the OFSV, the Offshore Oceanographic Science Vessel and the JSS. To date, VSY has completed \$1.0 billion in IRBs, with \$251 million in activities underway as part of its total IRB obligation of \$1.7 billion across these 3 projects.²

The NSS VP is designed to benefit the greater Canadian marine industry and help ensure its long-term sustainability. Under the NSS VP, shipyards are required to invest 0.5% of the value of NSS-awarded contracts into the Canadian marine industry to support human resources development, technology investment and industrial development.

As of December 31, 2019, of the \$19.8 million in obligations under the NSS VP, more than 100%, or \$21 million have either been completed or are in progress or planned.

²Current obligations are based on the value of contracts awarded as of January 2019 for design and engineering, equipment and systems integration, and ship construction. These values will increase in future reports as work progresses on existing projects under the NSS and new activities begin in 2020 for the Canadian Surface Combatant, as well as planned future maintenance support services for Halifax-class frigates.





ADDRESSING CHALLENGES

The Government of Canada (GC) is continuously working in concert with shipyards to monitor improvements in shipyard productivity, manage and adhere to timelines, and to closely monitor costs, all while investigating and implementing opportunities to minimize any potential work disruptions related to fluctuations in production.

Earlier this year, the GC and its shipbuilding partners demonstrated how the National Shipbuilding Strategy (NSS) provided the flexibility in addressing these challenges. For example, fluctuations in production and sustaining a skilled workforce at shipyards have been mitigated by re-sequencing the Joint Support Ship (JSS) and Offshore Oceanographic Science Vessel projects, as well as adding the construction of a sixth Arctic and Offshore Patrol Ship (AOPS). This allowed for uninterrupted work at the shipyard, mitigating the risk of potential layoffs and fluctuations in production between builds.

In 2019, the government faced new challenges with emerging shipbuilding needs. In order to ensure capacity to deliver important services that save lives, protect the environment, and help our economy grow, while keeping Canada's waters safe, secure, and open, the Canadian Coast Guard (CCG) needed new vessels to do their important work. In May 2019, the GC announced the construction of up to 18 new large vessels to renew the CCG fleet:

- 2 new AOPS (7 and 8) modified for the CCG to be built at Irving Shipbuilding Inc. (ISI)
- up to 16 multi-purpose vessels with icebreaking capacity to be built at Seaspan's Vancouver Shipyards (VSY)

Adding these vessels will keep both shipyards working to capacity until the late 2030s to 2040s. This long production run will better allow shipyards to generate efficiencies that will ultimately benefit Canada, ensure greater workforce stability, and minimize production slow-downs.



With urgent icebreaking needs and to support future shipbuilding requirements, and attract more talent and good jobs to communities through the country, the GC launched a competitive process to add a third Canadian shipyard as a strategic source of supply. The shipyard will be called to build 6 new program icebreakers for the CCG. The addition of a third shipyard will also increase the capacity to deliver new vessels in a timely manner.

Furthermore, the GC continued to address current and future fleet maintenance needs by announcing new contracts for the maintenance of the Royal Canadian Navy's (RCN) 12 Halifax-class frigates. Initial contracts worth \$1.5 billion were awarded to ISI, Seaspan's Victoria Shipyard and Chantier Davie. These shipyards will provide the necessary ongoing maintenance for the frigates until they are retired in the 2040s. These contracts are expected to create and sustain an estimated 400 direct jobs at each of the three respective shipyards and hundreds of spin-off jobs for material suppliers and sub-contractors.

The next classes of ships to be built, the Canadian Surface Combatants at ISI and the JSS at VSY, are highly complex projects. One of the challenges to be addressed in order to avoid fluctuations in production at the shipyards is a current shortage of experienced white and blue collar labour in the shipbuilding industry. Furthermore, it was previously acknowledged that original budgets for large vessel construction projects were set many years ago and were guided by limited experience and projections. Budgets have been updated, through the benefit of actual build experience at the yards, and continue to be closely monitored. For some large vessel construction projects, budgets remain under review and adjustments may be necessary.

We continue to leverage lessons learned to ensure future projections are realistic and achievable.



RISKS

The Government of Canada (GC) has developed a formal and robust risk management plan for the National Shipbuilding Strategy (NSS). The plan is informed by international best practices, and helps to predict, identify and mitigate the key risks facing the NSS. Risk management also helps to implement corrective actions to the NSS in order for us to be well-positioned to meet the long-term objectives of the Strategy. Risks are managed at the project, program (combat, non-combat and small vessels and sustainment) and over-arching NSS levels. Risks are also considered by the appropriate governance committees and are escalated as necessary from the working level to senior executives and the shipyards.

In addition to the challenges referenced earlier in the report, the NSS faces the following key risks:

- [Timely analysis and decision making](#)
- [Human resources capacity](#)
- [Communications](#)

Timely analysis and decision making

The NSS is a large and complex endeavour involving multiple projects, shipyards, departments and agencies. To prevent costly delays or impede achievement of greater efficiencies, it is important that information makes its way to decision makers in a timely manner. To mitigate this, the risk management team has been expanded, with the addition of more human resources. A number of third-party consultants have been added in various areas that touch on the NSS (such as insurance advisors, third parties on policy work and fairness monitors).



Human resources capacity

Ensuring sufficient human resources capacity exists to sustain Canada's industrial base is a risk common to all sectors. For the marine sector, and more specifically shipbuilding, there is a risk of insufficient human resources capacity needed to manage and execute complex, specialized shipbuilding projects. This risk includes project management and cost-estimating capacity within government and experienced, skilled resources, such as tradespeople and specialists at the shipyards.

For example, to retain the workforce at Seaspan's Vancouver Shipyards, a change was made in the sequencing for the construction of the Joint Support Ships (JSS), which will ensure focused engineering resources on each of the projects, while allowing for time between construction of the first and second JSS to incorporate lessons learned. Moreover, this allows for uninterrupted work at the shipyard, mitigating the risk of potential layoffs and fluctuations in production between builds.

This risk is also being mitigated by hiring more procurement officers, training government analysts on estimating cost, continuing to support training and apprenticeship programs, partnerships with colleges and universities, seeking out innovative recruitment approaches, and ensuring succession planning is in place. Also, a new PSPC directorate was created during 2019 that is focusing on creating a human resource strategy to address the growing challenge of labour shortages in support of the NSS.



Communications

The NSS is an ever-evolving portfolio of complex, long-term work. It can sometimes be a challenge to clearly communicate aspects of the NSS to both internal and external audiences. To mitigate the risk of ineffective internal communications, the GC has co-located project teams from implicated departments and implemented ongoing and robust governance that includes representation from the 2 main shipyards. Departments such as Innovation, Science and Economic Development Canada, National Defence, the Canadian Coast Guard and Public Services and Procurement Canada (PSPC) collaborate on a daily basis to help ensure ongoing, consistent communications with key strategic partners.

With respect to external communications, the GC keeps the public informed by publishing annual reports and providing information about the NSS, including status of projects, on the PSPC website. Announcements are held when major project milestones are achieved, and the government continues to seek opportunities to provide Canadians with timely information about the NSS. Moving forward, additional emphasis will be placed on increasing transparency around shipbuilding risks and realities.

Additionally, this year, a key element of external communications included social media from PSPC, CCG and National Defence to highlight not only the social and economic benefits, but also progress being achieved under the NSS. Over 400 posts were made on different social media platforms such as Facebook, Twitter and LinkedIn. The people building the ships are often profiled, and these posts have helped us reach a wider audience.



THE YEAR AHEAD

Looking forward to 2020, several key milestones are projected for the National Shipbuilding Strategy (NSS).

For example, the Canadian Coast Guard (CCG) expects to take delivery of its third and final Offshore Fisheries Science Vessel in summer 2020. The construction of the Offshore Oceanographic Science Vessel is expected to start at the end of 2020.

The Royal Canadian Navy (RCN) expects to take delivery of the first Arctic and Offshore Patrol Ship in 2020, while construction continues on the second, third and fourth ships. To ensure that we are able to berth these new ships, jetty infrastructure is being upgraded on the east and west coasts, as well as in the Arctic. Construction of the new B jetty at Canadian Forces Base Esquimalt is expected to be completed in the late 2020s. Additionally, work to establish a docking, replenishing and refuelling facility in Nanisivik, Nunavut, is underway, and is expected to be operational in 2020.

For the Canadian Surface Combatant, design work will progress with Irving Shipbuilding Inc. (ISI) and its subcontractor, Lockheed Martin Canada.

To support the RCN's and the CCG's operational requirements, Canadian shipyards other than ISI and Seaspan's Vancouver Shipyards (VSY) will continue to undertake the construction and delivery of vessels under 1,000 tonnes, including the delivery of the next set of search and rescue lifeboats.

The process to select a third shipyard under the NSS will continue, with the Request for Proposal and evaluation stage. This will include a third-party assessment of Chantier Davie's infrastructure, submission of a formal proposal, and a due diligence process to ensure the shipyard is financially



capable of performing the work and making any necessary upgrades to its infrastructure. This assessment is similar to the process previously undertaken to select ISI and VSY as strategic partners under the NSS in 2011.

Given the importance of icebreaking capacity, the government is also exploring options to ensure the Polar Icebreaker is built in the most efficient manner, but no decisions have been taken yet.

Through the NSS, the Government of Canada will continue to work with shipyards across the country to support shipbuilding requirements, including the recapitalization of the ageing CCG fleet and the construction of ferries for Transport Canada, announced in Budget 2019.

Finally, the worldwide COVID-19 crisis will have an effect on some NSS-related projects. The Government of Canada will work with the shipyards to evaluate and mitigate impacts on the budget and schedule due to the pandemic so that important work to renew the fleets of the RCN and the CCG is completed as quickly as possible.

More information

If you would like more information about the NSS, please consult the following links:

- [Infographic: Canada's National Shipbuilding Strategy—2019 year in review](#)
- [Shipbuilding projects to equip the Royal Canadian Navy and the Canadian Coast Guard](#)
- [National Shipbuilding Strategy annual reports](#)
- [Royal Canadian Navy patrol frigates](#)
- [Canadian Coast Guard fleet](#)
- [Industrial and technological benefits](#)
- [Value proposition](#)