

ANNUAL REPORT
2020/2021

OCEANS OF CHALLENGES

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4

STRENGTH IN THE STORM



6

Recovering and building a strong French maritime policy

Interview with the President of Armateurs de France

10

The French flag takes centre stage

12

Lifting barriers to crew changes, an absolute priority

14

CURRENTS OF CHANGE



16

Stepping up commitments to the environment

20

Attracting and retaining talent

22

Revitalising French shipping

24

Safety and security: protecting our seafarers

26

European affairs: constant vigilance

28

ALL HANDS ON DECK



30

A quite particular year

32

Collective missions

33

Canopée receives the honours

34

Merchant fleet operating under the French Flag

35

The members of Armateurs de France

STRENGTH IN THE STORM

A look back on the big events of the past year: the resilience displayed by the sector in response to Covid-19, the national maritime ambition embodied by the creation of a new ministry, a fast-changing environment and fresh new challenges.



RECOVERING AND BUILDING A STRONG FRENCH MARITIME POLICY

Elected President of Armateurs de France in April 2020, Jean-Emmanuel Sauvée took up office in the midst of the health crisis. Another challenge for the seafarer turned shipowner, who is above all proud of the companies he represents and who have shown themselves to be up to the task. With his optimistic outlook, he, too, is convinced that “the 21st century will be a maritime century” and devotes all his energy to guaranteeing the sector’s long-term future.



Jean-Emmanuel Sauvée, President of Armateurs de France

You were elected President of Armateurs de France in April 2020. What does this mandate mean for you?

JEAN-EMMANUEL SAUVÉE The cruise line I founded in 1988, Ponant, has been a member of Armateurs de France for 25 years, and today my peers have entrusted me with the office of President. As a former seafarer, it is a great honour for me to represent our community. It is a huge undertaking and a great responsibility towards French shipowners and our crews. The tone that I wish to give to this term of office is one of ambition and conquest. The crisis represents a major challenge for many of us; however, I am convinced that our fundamentals will enable us not only to bounce back, but also to stay on track towards the high ambition to which we have been aspiring for many years.

The Covid-19 crisis illustrated the strategic importance of French shipping activities for the country. Can you give us an example?

J.-E. S. The French shipping sector is very diversified. It encompasses offshore activities, oceanography and undersea research, submarine cable laying and maintenance, the transport of passengers and all types of goods, cruises but also assistance and rescue, port services and the supply of marine aggregates and many other activities. All these sectors have been affected by the crisis in a complex global environment, with strained international trade relations, increasing acts of piracy and fluctuating raw material costs, and much more besides. Passenger transport may have been brought to an abrupt halt, but goods have never stopped moving. Some segments have even remained highly active, and fortunately so, because if 90% of world trade had been affected by this crisis, the consequences would clearly have been disastrous, maybe irreversible. The entire global economy might have collapsed! Shipping is an essential link in supply chains, critical to the continuity of the economy and the very lives of citizens. Shipping companies have battled

against all odds to transport essential goods and products, power energy networks and maintain submarine cables that carry 99% of digital data. They have worked tirelessly, and continue to do so today, to facilitate crew changes, which have been severely constrained by preventive health measures, border closures and the lack of air transport. Hundreds of thousands of seafarers around the world have been stranded on board their ships after the expiry of their initial contracts, without knowing when they could be reunited with their loved ones. We can be proud of our seafarers, who have once again displayed their unwavering commitment. They are the invisible heroes of our daily lives, workers who are more essential than ever. Ensuring their safety and well-being on board is a priority. We can also salute the commitment of the port workers, without whom the goods could not be unloaded. It is therefore all the maritime players, essential links in the logistics chains, who have shown themselves to be up to the task of getting through this exceptional situation.

The crisis has also had serious repercussions. Can you tell us more?

J.-E. S. The French shipowners most affected by the Covid crisis are those who carry passengers on their ferries, cruise ships or those operating local island services. The activity of these companies has fallen by up to 90%. Let us just remind ourselves that in normal times, they carry about 50 million passengers a year, which is the equivalent of half of the customers flown by Air France KLM. Companies operating cross-Channel services have been hit by a double whammy, with both the impact of the coronavirus crisis and the effects of Brexit. Regarding cruises, how could we conceive that the 350 cruise ships from all over the world, which have enjoyed increasing popularity over the past 40 years, could all be at a standstill for more than a year? We had never experienced a shock of such violence in the history of the merchant navy, with 100% of a sector such as the world ocean liner fleet at berth. →

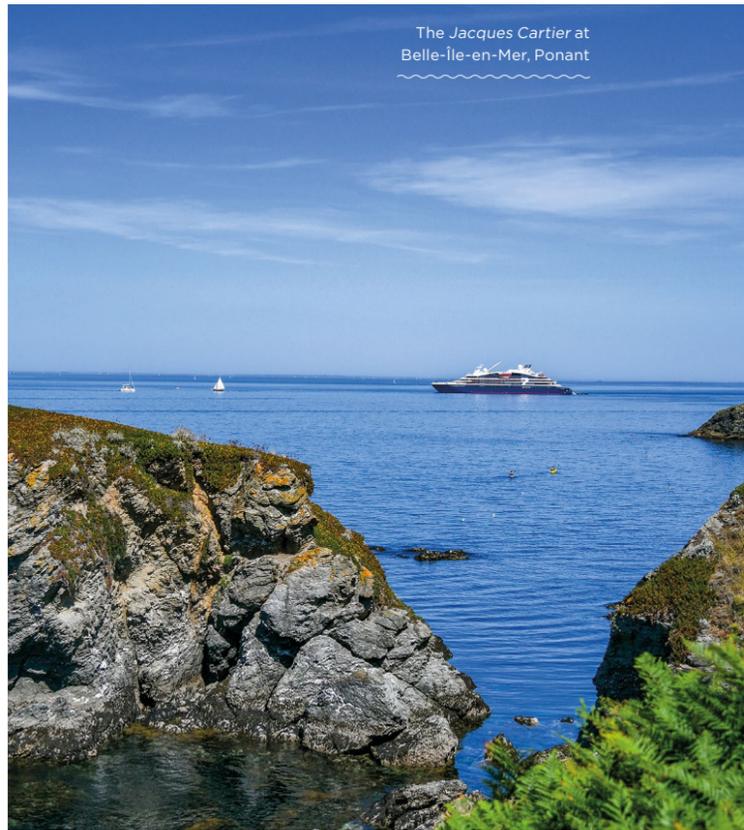
"IT IS INDEED ESSENTIAL FOR A COUNTRY LIKE FRANCE THAT THE SHIPPING SECTOR, A LINK BETWEEN PEOPLE, GOODS AND CONTINENTS, BE ELEVATED TO THE HIGHEST LEVEL OF GOVERNMENT."

JEAN-EMMANUEL SAUVÉE

Finally, this crisis raises questions for all of us, collectively, about issues of sovereignty, the diversification of our supplies, the repositioning of our manufacturers, responsible and sustainable tourism, regional procurement contracts and the logistics circuits connected with them... Challenges in which shipping will always have a role to play!

You have also set about drawing up a Strategic Plan for the Merchant Navy. What aims do you have in mind for it?

J.-E. S. What we are particularly driven by is the substantial contribution we can make to the ambition often reiterated by the President of the Republic. Emmanuel Macron declared: "The 21st century will be a maritime century!" at the "Assises de la Mer" in December 2019, then announced "the acceleration of our maritime strategy" after the first lockdown last spring. Another strong signal for the blue economy that we look upon favourably is the creation, in 2020, of the Ministry of Marine Affairs. It is indeed essential for a country like France that the shipping sector, a link between people, goods and continents, be elevated to the highest level of Government. Our Strategic Plan for the Merchant Navy echoes this ambition and serves two major objectives. The first is to have a French fleet, a genuine strategic tool for the nation and its sovereignty issues, working for the benefit of national economic players for all types of transport and services, in all circumstances, based on the values of economic



The Jacques Cartier at Belle-Île-en-Mer, Ponant

solidarity. The second is to shape a merchant fleet under the French flag that is exemplary from environmental and social perspectives, meeting the most advanced regulations, while deliberately making the transition to a low-carbon future. In concrete terms, this plan is structured around four priorities and 40 measures, which are all tangible and necessary solutions that we propose to implement to achieve this maritime ambition (see details on page 11).

The launch of the Fontenoy du Maritime consultation is another positive development. What is your view?

J.-E. S. I'd just like to mention that shipowners are very fond of this Place de Fontenoy on which the Ministry of the Merchant Navy was built at the beginning of the 1930s. Initially, in our strategic plan, we wanted to give this name to a broad, co-constructed consultation between seafarers

and shipowners with a view to reviewing the maritime labour code and the disciplinary code of the Merchant Navy, which date back to 1926. Then the Minister for Marine Affairs, Annick Girardin, took up this name, extending it further, and last autumn launched the Fontenoy du Maritime. It is a collective project to improve the competitiveness of our sector and we want to make a major contribution to it. Indeed, how could you possibly devise a maritime policy without shipowners, without French seafarers and without ships under the French flag? We must be the spearhead of this Fontenoy because it will be up to us, if it is to be successful, to carry out the projects that are approved.

2021 is a pivotal year for French shipping. What message would you like to send to the members of Armateurs de France and to the entire French shipping sector?

J.-E. S. A message of optimism, ambitions, projects and the maritime ideal! I would like to appeal to all those involved in the maritime sector, especially young seafarers: set sail towards new times! The entire maritime industry can assert itself as a laboratory for new energies and ideas. Shipowners must open up more, beyond the shipping world. We will develop new forms of synergy between us and increase cooperation with our partners: French Maritime Cluster, French Marine Industry Group, Union of French Ports, the transport chain as a whole, the scientific world and, of course, the French Navy. Similarly, a strengthened partnership must be implemented with our regions, our coastal communities, our departments and, of course, overseas territories. It is by working together that we will build a strong maritime policy for France! —

Curriculum vitae

Jean-Emmanuel Sauvée, 56, President of Armateurs de France since April 2020, for a two-year term.

Graduated from the French Maritime Academy in 1986.

Worked on the vessels of Brittany Ferries, Bourbon Offshore and subsequently CGM (now CMA CGM).

At the age of 23, created the Ponant cruise line, all of whose ships fly the French flag.

He has been CEO of Ponant for 33 years and has fond memories of the early years of his career as a seafarer.

He follows a long family tradition: his grandfather was a journalist and founded the weekly newspaper *Le Marin* in 1946 and his father was General Administrator of Marine Affairs.

His favourite island or holiday spot

"The Ponant islands, of course, but also all the islands in France and its overseas territories; in particular New Caledonia, where I lived for five years. Among the Ponant islands, I have a soft spot for Belle-Île-en-Mer, where my mother comes from, and in fact bears the name of one of its villages: Bedex."

THE FRENCH FLAG TAKES CENTRE STAGE



Armateurs de France General Assembly on 28 October 2020, in the presence of Annick Girardin, Minister for Marine Affairs

2020 was a watershed year for Armateurs de France, from the drafting of the Strategic Plan for the Merchant Navy to the launch of the Fontenoy du Maritime industry consultation, which should lead, in 2021, to operational measures keenly awaited by the French shipping sector. Read the timeline of events as they unfolded.

ACT 1

Spring 2020. In view of the coronavirus crisis, the new President of Armateurs de France Jean-Emmanuel Sauvée brought the shipowner profession to establish an ambitious plan for the merchant navy (under the acronym PSMM). Its purpose: to fulfil the French flag's goals of business recovery, economic solidarity, and social and environmental exemplarity.

ACT 2

Once it had been structured in the form of a document comprising four pillars and 40 actions, the report was submitted in person to Annick Girardin, Minister for Marine Affairs, on her appointment in July 2020, and to the members of the Government and parliamentarians involved in shipping issues. Other recipients included trade unions in the clear belief that the sector, supported by the values of solidarity which unite seafarers, is more than ever capable of working and progressing together.

ACT 3

Aware of the strategic challenges raised by this sector in all its diversity, Ms Girardin personally attended the Armateurs de France General Assembly on 28 October 2020. She announced her intention to draw inspiration from the proposals in the PSMM to start up the Fontenoy du Maritime consultation.

ACT 4

There subsequently followed an initial phase in which the views of the relevant stakeholders - more than 60 shipping players - were heard by members of her cabinet and the Directorate for Maritime Affairs. Shipowners made a significant contribution to this input phase and took advantage of the opportunity to make their expectations known and formulate concrete proposals.

ACT 5 To be continued!

2021 will be the landing year for the process, and shipowners continue to harbour high expectations. Following a stimulus plan and a CIMER¹ which did not specifically address the sector, the Fontenoy is the crucial project on which all hopes rest. It must send out a strong message in respect of challenges such as economic recovery, investment, decarbonisation, jobs, training and skills, economic solidarity, innovation... All of this, on an increasingly complex and competitive European and international backdrop.

In view of these major issues, Armateurs de France will make every effort to enrich the process with contributions made in a constructive spirit of partnership. —



"With the Fontenoy du Maritime, France is giving itself the wherewithal to establish its maritime power and extend the influence of the French flag. Working in concert with our shipping ecosystem, we will succeed in concluding a competitiveness agreement by summer 2021."

Annick Girardin,
Minister for Marine Affairs,
before the French National Assembly, 17 November 2020

¹ Inter-ministerial Committee for Marine Affairs

The four pillars of the Strategic Plan for the Merchant Navy

ECONOMIC SOLIDARITY

Goal: encourage economic solidarity between French players, to guarantee the country control over a proportion of its supplies and exports, and thereby promote the development of the French flag.

SOCIAL AND SOCIETAL

Goal: develop the employment branch of seafarers, officers and sedentary personnel, the excellence of their training and the conditions and appeal of their jobs, their careers, etc.



ENVIRONMENT AND SUSTAINABLE TRANSPORT

Goal: create the conditions for a dynamic, innovative and competitive ecological transition.

PRODUCTIVE INVESTMENT

Goal: facilitate the funding of a highly capital-intensive activity committed to the transition.

LIFTING BARRIERS TO CREW CHANGES, AN ABSOLUTE PRIORITY

Due to the coronavirus crisis, 2020 and the first half of 2021 have been and remain challenging for seafarers. They must continue to serve logistics and the global economy in spite of the serious consequences on their private and work lives. Here we take a closer look.



"We are attentive to seafarers' well-being and safety, even more so in the current health environment; Armateurs de France has therefore initiated a process to improve their working conditions. To this end, the organisation has sent a letter to companies to encourage them to protect the health and safety of their employees by adopting measures on the length of service periods on board and preserving a work-life balance. In particular, shipping companies are encouraged to conclude a company agreement on service periods on board. We are certain that this type of initiative will send a strong signal to the crews who work so hard on board vessels every day in difficult conditions."

Maha Vandewalle,
Head of social affairs
and training
at Armateurs de France

Up to
400,000
seafarers have been
stranded on land
or at sea

In December 2020,
45
States recognised
seafarers as essential
workers

Austral, Ponant

- 1 Direction des affaires maritimes / Directorate of Maritime Affairs
- 2 Établissement National des Invalides de la Marine / Seafarers' Health Service
- 3 Registre International Français / French Flag Register

- 4 International Chamber of Shipping
- 5 European Community Shipowners' Associations
- 6 International Maritime Organisation
- 7 World Health Organisation

in solidarity with the 150,000 seafarers who were stranded on land or at sea at the time (a figure which rose to 400,000 at the end of 2020!). Another highly symbolic milestone, on 1 December 2020: a UN¹⁰ resolution called on Member States to designate seafarers as essential workers - as France has done - and to implement measures to facilitate crew changes. In addition, parliamentarians gave their public support to the profession, both to manage the crisis and to bring about the right conditions to rescue and revitalise the hardest-hit companies.

Protecting these everyday heroes

On a national level, Armateurs de France worked on many issues connected with this crisis: facilitating access to serological and virological tests - especially for seafarers spending more than seven days aboard -; extending the validity of certain individual administrative rulings, monitoring ENSM⁹ cadets embarking or disembarking for their training courses, etc. On a day-to-day basis, priority had to be given to dealing with all the cases reported by shipowners and resolving some very complicated situations. The lack of visibility for seafarers and shipowners as to the timing of their crew changes was a particular cause for concern. In parallel, the year was marked by some very solemn occasions for the shipping community. On 1 May 2020, for example, vessels from all over the world sounded their horns

The necessity of taking stock

It is, naturally, too early to draw any conclusions: the crisis is not yet over, and new issues are emerging every day, in particular the vaccination of seafarers, a subject on which Armateurs de France sent a question to the Minister for Marine Affairs at the beginning of 2021. In any case, taking stock of this event at both national and international levels will be a fundamental necessity in order to consolidate the resilience of this strategic sector, which is essential to the world economy. In the meantime, it is to be hoped that the companies and seafarers will be able to get through the crisis without irreparable personal and collective damage. This justifies, at the very least, that very careful attention be paid to shipping activities, whose stakeholders have demonstrated exemplarity in the performance of their duties. —



"The guichet unique (single point of contact) assists shipowners with the organisation of seafarers' rotations and movements. It acts as an interface with the various competent Government departments, mainly the diplomatic network and the border police. In the spring of 2020, we received more than 600 requests for assistance: refusal to embark and disembark seafarers, difficulties in getting them recognised as essential workers, problems with visas, availability of tests, access to flights, quarantine conditions... We had to respond to a lot of critical situations quickly and reactively."

Stéphane Garziano,
Head of the RIF *guichet unique*

While they are efficiently orchestrated in 'normal' times, the organisation of crew changes has been considerably disrupted by governments' restrictions. As one, but not always at the same time, governments have been obliged to enforce strict rules to permit seafarers to set foot in their country and return to their ship or get to an airport and be reunited with their families. The possible ports of call, the availability and reliability of tests, the provision of masks, quarantine locations, transit visas, land transport and air flights: all these factors have taken on unprecedented proportions. This has ultimately resulted in longer service periods on board for hundreds of thousands of seafarers.

Total mobilisation

From the very beginning of the crisis, Armateurs de France mobilised its resources on all fronts to contribute operational solutions to the problems encountered. Regular meetings were programmed with the trade

unions of both seagoing and sedentary personnel. A discussion group also met every week to interact effectively with the administrative bodies dealing with the crisis (DAM¹, ENIM², the seafarers' health agency, RIF³ office, etc.). The shipowner community salutes and offers its heartfelt thanks for the commitment of all these services, which have exemplified the values of solidarity in the shipping world and which succeeded in mobilising other ministries even more broadly, notably the Ministry of Foreign Affairs and its network of embassies and consulates. Beyond this essential social aspect, particular attention was paid to economic aspects, in the aim of supporting companies in implementing the tools offered by the public authorities (Government-backed loan, furlough, etc.) and, above all, highlighting the specificities of our sector. The international dimension of the pandemic also called for a great deal of work with organisations such as the ICS⁴ and ECSA⁵.

Armateurs de France deals with an array of challenges: helping the French shipping sector recover while stepping up its environmental commitments, attracting and retaining talent, and making safety an absolute priority - all on a complex European and international backdrop.



CURRENTS OF CHANGE

STEPPING UP COMMITMENTS TO THE ENVIRONMENT

In spite of the health crisis, Armateurs de France has maintained its determination to fight global warming while also acting to address public health issues and preserve biodiversity.



Orca, Bourbon



"Wind propulsion is one of the most appropriate solutions to immediately decarbonise the sector. In October 2020, we teamed up with the NGO Wind Ship to organise a workshop on this energy source, which is free and available all over the world. The presentation of the players in this emerging and promising sector brought together around a hundred participants from all walks of life, eager to learn more about these projects and the French dynamic in this field."

Nelly Grassin,
Head of quality and technical safety, security and environmental affairs at Armateurs de France



View of Neoliner, Neoline

The energy mix: multiple challenges ahead

To meet the targets set by the IMO, it is imperative to combine different energy sources, given that there is not yet one single solution to decarbonise all types of vessels. Among the solutions under consideration, France can pride itself on a wind-propulsion industry of excellence, represented in particular by the new members of Armateurs de France, Zéphyr & Borée, TOWT and Neoline, who have opted for this energy source to decarbonise their vessels. Renewable by nature, wind can be used as the main source of propulsion or for assistance, from the construction of the ships or retrofitted, depending on the technology chosen: flexible or rigid sails, kits, masts, etc. Armateurs de France supports the development of this promising sector and dedicated a workshop to it in 2020 (see the quote from Nelly Grassin).

The use of hydrogen, whether in liquid form or in synthetic fuels, is another essential solution for shipowners, although it still lacks maturity for large-scale maritime application. This brought Armateurs de France to organise a technical day last October with France Hydrogène

at the ArianeGroup site in Vernon. Its aim was to encourage dialogue between shipowners and hydrogen professionals on the technological solutions available and how they can be applied to different categories. Many challenges exist for on-board hydrogen: storage and sufficient power of fuel cells, fuel storage, safety. And other obstacles have yet to be overcome, such as the production of green hydrogen in sufficient quantity, sufficient fuel supply, and its cost. The widespread development of hydrogen is therefore only a medium-term perspective, but there are an increasing number of experiments and demonstrators underway to promote momentum for the entire ecosystem.

With two years to go before the IMO's short-term measures come into force, and although disruptive solutions are not yet available, shipowners are already working towards decarbonisation. Their initiatives are manifold: ordering ships powered by liquefied natural gas (LNG), connecting ships to shore to prevent emissions during port calls, using biofuels, taking on battery packs, improving hull, propeller and rudder design, reducing and optimising vessel speeds, etc. →

The shipping sector has not been spared by the Covid-19 pandemic but remains resolutely committed to reducing greenhouse gas (GHG) emissions from its activities. According to the IMO's initial strategy in 2018, shipping must reduce CO₂ emissions from vessels by 40% by 2030 (per tonne per kilometre), and reduce its total emissions by at least 50% by 2050 compared with 2008. While the coronavirus crisis has hampered IMO's work, the institution has made major strides in developing robust emission reduction measures that should apply to vessels as early as 2023.

Closely monitoring the negotiations underway in the MEPC², Armateurs de France regularly brings together its members to discuss with the French Administration and Perma-

nent Representation to the IMO to ensure that these measures are applicable throughout the world, without distortion of competition and in compliance with the Paris Agreement which recently celebrated its fifth anniversary. In 2015, the signatory Governments had collectively pledged to keep the average temperature increase below 2°C.³

According to the 4th IMO report published last August, in 2018 maritime shipping⁴ accounted for 2.89% of anthropogenic CO₂ emissions worldwide, making it the most environmentally responsible freight transport mode in comparison with land and air transport. Nevertheless, shipping is committed to playing its part in the fight against global warming.



Geneviève Van Rossum, Ambassador Permanent Representative of France to the IMO, speaks at the wind workshop

The majority of ships built after 2022 will be **30%** more energy efficient¹ than those built before 2013

1 EEDI - Energy Efficiency Design Index
2 IMO Marine Environment Protection Committee
3 Compared with pre-industrial levels, and pursue efforts to limit it even further to 1.5°C
4 International, domestic and fishing



“The Ocean & Climate Platform is a coalition that today brings together more than 90 members from a variety of sectors, all committed to the preservation of the oceans, the climate and biodiversity. Armateurs de France was there at its inception, and its involvement has continued to grow. As a member of the Board of Administration since 2018, the organisation brings the shipping industry’s perspective and expertise to the table, and also acts as a relay for its commitment. Its valuable expertise enriches and strengthens the scope of our actions”

Romain Troublé,
President of the Ocean & Climate Platform

Between 2008 and 2018, ships improved their energy efficiency¹ by **31.8%**

4th IMO greenhouse gas report

80%
of plastic waste found in the ocean comes from the land

Preserving biodiversity with NGOs

The imperative of environmental protection does not stop at the reduction of emissions. Shipowners are increasingly standing up for biodiversity and the oceans in general: reducing the use of plastic on board, managing ballast water to limit the risk of spreading invasive species around the world, reducing the risk of collisions with cetaceans and underwater noise, working with the scientific community, etc.

To support this dynamic as effectively as possible, Armateurs de France is a member of the Ocean & Climate Platform (OCP) committed to ocean protection. The OCP is both a forum for debate between



Atalante and Pourquoi pas ?, Genavir

maritime stakeholders from different backgrounds and a place for converging actions and advocacy with a view to sharing expertise. In 2020, Armateurs de France in fact contributed to the platform’s biodiversity manifesto and co-organised a webinar on the environmental challenges of shipping (see quote from Romain Troublé).

In its belief that there is strength in unity to meet environmental challenges, the organisation is in permanent contact with many NGOs and more broadly with all maritime stakeholders. The launch in 2020 of the European programme Green Marine Europe is a strong illustration of this (see the quote from Antidia Citores and the page opposite).



“The project of a European label for shipowners emerged following a discussion between Surfrider Foundation Europe and Armateurs de France about ten years ago. We have come a long way from the inception of this idea to the launch of the Green Marine Europe label in April 2020.

Armateurs de France is still one of its key players. Its expertise, the dynamism of its team and its cooperation were decisive in the creation of the label and will continue to be valuable in its future development”

Antidia Citores,
Green Marine Europe Label Development Manager and spokesperson for Surfrider Foundation Europe

GREEN MARINE EUROPE OR VOLUNTARY ENVIRONMENTAL PERFORMANCE



Green Marine Europe has awarded the label to six French shipowners: Brittany Ferries, Corsica Linea, Ifremer and its subsidiary Genavir, La Méditerranéenne, Orange Marine and Socatra.

Inaugurated in April 2020, the GME² label, initiated by Surfrider Foundation Europe among others, is the result of collaboration between numerous maritime stakeholders from industry, civil society, administrations, etc. Armateurs de France and several of its members have been active in the governance of the label since its inception and now sit on the advisory and steering committees.

GME is the European adaptation of Green Marine, a voluntary environmental certification programme for the North American marine industry, launched in 2007 at the initiative of a group of shipowners. Its philosophy is to improve the environmental performance of maritime stakeholders, above and beyond regulatory requirements, in a number of areas: pollutant and GHG emissions, underwater noise, invasive species, management of waste and oily discharges, vessel recycling, etc.

GME constitutes a genuine performance driver since, in order to keep the label, shipowners

are obliged to demonstrate year-on-year improvement in different areas. Its strength lies in its vocation of covering all environmental issues, and the rigour of the labelling process. Its development in Europe is a true opportunity to collectively display the commitment and proactivity of the European shipping sector in environmental matters.

To take part in the programme, candidates must carry out a self-assessment on all the criteria using a rating scale from 1 to 5, with 1 reflecting regulatory monitoring and 5 a level of excellence and leadership. The processes and results are then audited by an independent GME accredited verifier every two years. Shipowners must then agree to the publication of their individual results. For its first year, GME has awarded the label to six French shipowners: Brittany Ferries, Corsica Linea, Ifremer and its subsidiary Genavir, La Méditerranéenne, Orange Marine and Socatra. —

1 EEOI - Energy Efficiency Operational Indicator
2 Green Marine Europe

ATTRACTING AND RETAINING TALENT

Armateurs de France has many employment-related missions: negotiating collective bargaining agreements with unions, coordinating the training and employment policy of its branches, promoting social dialogue and defending the interests of its members before a range of stakeholders. Here, we take a look back on 2020.



Cap Finistère, Brittany Ferries

The maritime transport and services sector currently employs 25,000 people.

They include 16,300 seafarers (42% officers and 57% ratings) and 8,700 sedentary workers. Armateurs de France is keen to rapidly increase the seafarer headcount, particularly officers, to meet various challenges.

Recruiting French seafarers, a priority

One of the main goals of the Strategic Plan for the Merchant Navy drawn up by Armateurs de France is to develop an exemplary merchant fleet flying the French flag. This entails, among other things, promoting and developing French employment.

Furthermore, French seafarers are internationally renowned for the quality of their training. The standout feature of the majority of officers is their versatility. This is a key asset for shipowners, particularly when it comes to manoeuvring new LNG-

powered ships, for example. The talent and skills of these French seafarers are therefore crucial for the shipping lines of today and tomorrow.

Observe and act

Another finding is the increasing willingness of companies to take on board students during their schooling and recruit trained officers, owing to the recent growth of the fleet and the quantity of vessels on order. The resulting new jobs are not all covered by the numbers graduating from the French Maritime Academy (ENSM), through either its engineering course or its monovalent course.

Shipping companies therefore have substantial and immediate needs. To meet them, Armateurs de France sees the solutions lying mainly in improving training processes and increasing the number of ENSM students. Indeed, the cohorts could be increased in both the general and

monovalent courses. In such an eventuality, the academy should see its budget increased in turn. These solutions were raised and shared by attendees of the National Symposium on Maritime Employment organised by Sophie Panonacle, the MP for the Bay of Arcachon. Thought processes were also initiated on the development of links with the French Navy and on internal promotion. Armateurs de France expressed its concerns and wishes in a letter addressed to the Minister for Marine Affairs in September 2020: a message that was received loud and clear, since a chapter dedicated to employment and training has been added to the Fontenoy du Maritime consultation process. The organisation remains strongly mobilised on these subjects.

The importance of social consultation

In 2020, Armateurs de France continued its efforts to promote the interests of the merchant navy sector and the best working conditions for its employees. These efforts were reflected, among other things, in the negotiation of collective bargaining agreements falling within its scope of competence. This year, an amendment was signed in the sedentary personnel branch on the

industry minimum wage, while an agreement on professional gender equality was also signed in all three branches. Through these contracts, the social partners reaffirmed the need for equal treatment in terms of pay, career development and training. The agreements thereby encourage the sector's stakeholders to pursue active policies in this area. In addition, a Standing Joint Committee for Negotiation and Interpretation (CPPNI in French) was set up within the officers and ratings branch. The CPPNI is the cornerstone of employer-employee relations and its role is to represent the branches in their support to companies and towards government authorities, but also to monitor work and employment conditions. It negotiates agreements and amendments to the collective bargaining agreement, records companies' own collective agreements, produces an annual report and issues opinions on the interpretation of the collective agreement. Finally, work was carried out to affiliate shipowners to a new insurer, AG2R LA MONDIALE, for the provident scheme for seafaring personnel. The result of this change was lower contributions and better guarantees. —



"ENSM's main mission is to deliver higher education for merchant navy officers and engineers in the fields of maritime and para-maritime activities. In the face of accelerating transitions and changes, Armateurs de France can count on the academy to detect talent, recognise passion for the sea, educate, invent the world and the jobs of the future to cater to the need for qualified officers. More than 360 seafarers are educated at the school each year, about a third of whom as part of vocational training."

Caroline Grégoire,
Director General of ENSM



Croze, Orange Marine

Measuring the employer audience, a real challenge for social dialogue

As part of the overhaul of employer representativity following the Act of Parliament of 5 March 2014, the audience of employer organisations must be measured at national and interprofessional level, and in each professional branch, every four years. This process determines which employer organisations can be qualified as "representative". This is an important issue, since collective bargaining agreements can only be applied industry-wide ("extended") if they have been negotiated by "representative" employer organisations. In addition, being qualified as representative gives the organisation the right to object to the extension of agreements and is necessary for the receipt of public funding for social dialogue. Calculated for the first time in 2017, the employer audience is scheduled to be measured again in 2021 and Armateurs de France has naturally offered to conduct the exercise in order to continue to play a major role in collective bargaining.

The French maritime transport and services sector currently employs

25,000

employees, of which

16,300

seafarers and

8,700

sedentary staff

REVITALISING FRENCH SHIPPING

At a time of low-carbon transition and post-Covid recovery, the French shipping sector is more dependent than ever on Government support to consolidate existing finance mechanisms, guarantee its competitiveness and ultimately safeguard its future.

The VB Typhon, Boluda France, helps The Fort de France, CMA CGM



The coronavirus crisis in 2020 generated an array of difficulties for many shipping and maritime service companies: a slowdown in the global economy, a total lack of visibility and very tough market conditions, with some market segments recording significant losses in revenue. In these circumstances, shipowners are facing a tricky task in securing financing and diversifying their resources.

Constructive dialogue

The need to facilitate and increase the attractiveness of shipping-related investments has long been advocated by Armateurs de France and was the focus of the “Stimulus and Financing” workshop scheduled by the organisation in October 2020. Bringing together parliamentarians committed to the blue economy, representatives of banking organisations (public and private), and shipping company managers, the meeting provided an opportunity to discuss

the challenges of vessel financing and offered a starting point for essential collaborative work (see quote from Alexandre Amedjian).

Concrete proposals

Armateurs de France furthermore defends several proposals intended to maintain the stability of the commitments of French shipping companies in a particularly strained global economic environment. These proposals, listed in the “Productive Investment” pack of the Strategic Plan for the Merchant Navy, were also discussed by organisation’s Economy/Tax Committee. They consist primarily of consolidating and amplifying the three fiscal and social benefits on which the shipping industry relies: the tax lease system, taxation by tonnage and social contribution exemptions, whose effectiveness has gradually diminished. Armateurs de France has identified three main issues and set out a series of concrete measures relating to them.

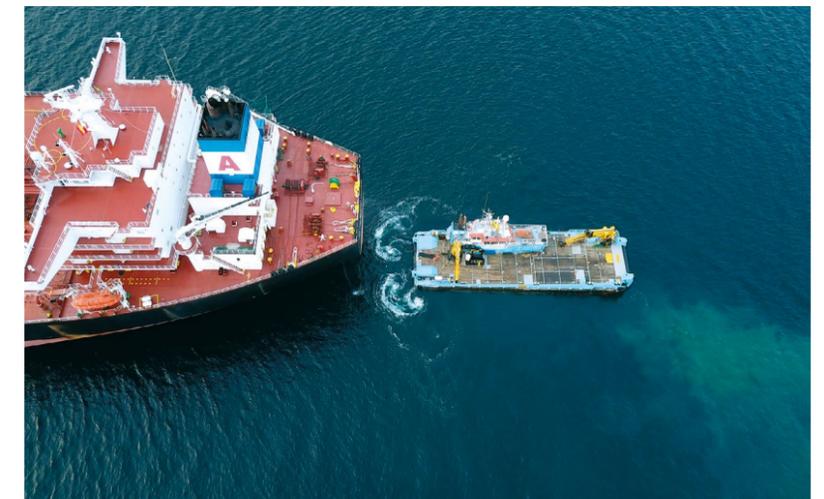


“On 28 October 2020, Armateurs de France brought together parliamentarians, banking representatives and company leaders to discuss the challenges of shipping financing. With my counterparts, we presented an overview of ship financing on a global scale, taking stock of regulatory and prudential constraints and their consequences on banks’ investment decisions. This meeting also gave us an opportunity to explain how our organisations are rising to the challenge of decarbonising the shipping sector. At the same time, we noted the genuine momentum and ambitions of French shipowners in this transition, and therefore the need to find the most appropriate ways to move forward together in a dialogue of trust.”

Alexandre Amedjian,
Head of Shipping Finance for Europe, Middle East & Americas

11.5 bn
tonnes transported
in 2020 by the global
shipping industry

Jif Artemis, Jifmar



First, there is the desire to improve the mechanism provided for under the tax lease systems so as to maintain its appeal. In practice, this measure would result in shortening vessel depreciation periods and increasing the declining depreciation coefficient. These adjustments would help increase shipowners’ capacity to develop and renew their fleet, so that they can more rapidly adapt to technological progress that is likely to intensify further in the years to come.

Secondly, the introduction of measures to broaden financing resources would specifically help cater to the significant increase in equity capital for any new investment, which will become obligatory starting next year due to the entry into force of the Basel IV regulation. Indeed, it appears essential to broaden the range of current financing resources available for French ships to other corporate finance sources that might be interested in participating, alone or alongside traditional investors from the banking sector, in the development of French shipping. Armateurs de France thus proposes the creation of alternative financing tools, such as the “Maritime Investment Certificate”, designed to finance merchant ships whose first registration is under the French flag,

in order to encourage the renewal of the fleet by drawing capital from outside the banking system. Finally, another fundamental issue is the effective implementation of the Public Investment Bank’s (BPI) public guarantee arrangements, which are powerful levers for banks to accompany projects between shipowners and French shipbuilding yards or equipment manufacturers. In particular, Armateurs de France calls for the unreserved application of the BPI’s Strategic Projects Guarantee to the benefit of French shipowners.

A determined partnership

With the extra costs associated with the eco-energy transition estimated to amount to around 20% for new vessels or those retrofitted during their lifetime, financing the fleet’s renewal remains a crucial topic for French shipping. Consequently, Armateurs de France aims to remain a constructive and determined working partner in the development of the competitiveness agreement that the Minister for Marine Affairs has timetabled for spring 2021. It is crucial that this work facilitates the obtaining of sufficient and affordable financing, which is a prerequisite for the maintenance and development of a high-quality French merchant navy. —

SAFETY AND SECURITY: PROTECTING OUR SEAFARERS

Even during times of crisis, seafarers remain exposed to increasing threats to the security of maritime activities. Armateurs de France supports its members in developing best practices and strengthening exchanges with public partners, in particular the French Navy and the Directorate of Maritime Affairs.



Astella, Socatra

The numbers speak for themselves: acts of piracy in 2020 were not slowed down by the Covid-19 crisis. Worse still, in the Gulf of Guinea, the area of greatest concern, attacks are shifting increasingly further from the coast, where local navies are less capable of reacting. In 2020, 41% of the 114 events linked to piracy or robbery recorded by the MICA¹ Center in this region occurred more than 40 nautical miles from the coast. Alongside this serious extension of the threat, the pirates are also diversifying their modes of action and the number of seafarers kidnapped in 2020 remained at the all-time high that it had already reached in 2019.

This is not a new problem, but it requires existing solutions to be reinforced and new ones to be

found to halt the escalation. Armateurs de France is pushing for greater engagement in the Gulf of Guinea: more patrols by local navies; better protection for ships at anchor; and a stronger military presence beyond territorial waters, with a coordinated international or European naval mission able to contain the threat close to shore, where local navies are most effective. The organisation is also working to facilitate the use of armed guards on board ships, which is currently prohibited in the territorial waters of many States in the region.

The approach undertaken is particularly complex due to the many stakeholders involved, both on a local scale - with a variety of States with unequal ambitions and means - and on an international scale. On this point, Armateurs de France

welcomes France's participation in numerous cooperation and information-sharing initiatives, such as the MDAT-GoG² and the G7+-FoGG³, which brings together the members of the G7, the States of the Gulf of Guinea, and partner States and international organisations (EU, UNODC⁴, etc.). Shipowners also rely on the regular monitoring and information provided by the MICA Center.



"In the Gulf of Guinea, piracy continues to threaten the lives of seafarers. This menace, whose origins can be traced back to land, requires long-term treatment. France, which deploys permanent resources in the region (Operation Corymbe, prepositioned forces), is working to improve the capacities of the region's navies and supports the Yaoundé Architecture. But the need is immediate, and the local authorities are struggling to respond to this need. We therefore support the European initiative for coordinated maritime presences. Today, cooperation between shipowners and armies, in particular the French Navy and the MICA Center, the implementation of BMP⁶ West Africa and the sharing of information with MDAT-GoG, are all more essential than ever."

Admiral Hervé Hamelin,
Ministerial coordinator
for maritime safety
and security

The organisation actively collaborates with its partners in the French Navy, in particular during the annual Navy-Shipowners' Meetings, which bring together security experts from shipping companies and representatives of the Navy's General Staff. These events provide an opportunity to discuss the main threats to maritime traffic security, with productive conversations on common concerns and current or future initiatives. Armateurs de France also organises meetings dedicated to piracy in the Gulf of Guinea to encourage the sharing of best practices between shipowners, and takes an active part in the ICS working group on the subject.

Cybersecurity: new rules and synergies

Another growing challenge for shipping companies is cybersecurity, linked with the digitalisation and progressive automation of their activities. It is not only a question of protecting information systems and vessels, but above all of protecting seafarers and passengers. Cybersecurity is neither the core business of shipowners nor that of seafarers, and it requires significant technical, financial and human resources.

Armateurs de France is campaigning for the constraints and solutions to protect from cyber risks to be tailored to the diversity of its members' activities. All ships are different, and it is important that the rules developed at international level are applied in consideration of the specificities of each ship. In this respect, the organisation is satisfied with the recommendations developed by the Directorate of Maritime Affairs for the implementation of the international regulations that came into force on 1 January 2021, which require the consideration of cyber risk on board ships. These recommendations allow each shipowner to adapt the level of requirement to its needs.

To facilitate the application of these new rules, Armateurs de France regularly organises steering committees and theme-based meetings. Its members can share their best practices and exchange with public bodies such as the ANSSI⁵. Its involvement in the creation of the France Cyber Maritime association is further proof of the organisation's commitment to this issue, which needs to be addressed proactively. —



Amphibious helicopter carrier Dixmude, French Navy

375

acts of maritime piracy and robbery reported worldwide

2020 MICA Center report

142

seafarers kidnapped in the Gulf of Guinea

2020 MICA Center report

1 Maritime Information Cooperation & Awareness
2 Maritime Domain Awareness for Trade - Gulf of Guinea
3 Friends of the Gulf of Guinea

4 United Nations Office on Drugs and Crime
5 National Agency for Information System Security
6 Best Management Practices

EUROPEAN AFFAIRS: CONSTANT VIGILANCE

On issues such as the Green Deal, taxonomy and Brexit, Armateurs de France fully exploits its power of influence within European bodies to ensure that the measures taken reflect the specific characteristics of French shipping and preserve the competitiveness of the sector.



"ECSA represents European shipowners' associations. Armateurs de France sits on all ECSA's working groups and governance bodies, contributing to its technical work and to its political and institutional influence. This collaboration is highly useful and beneficial for both parties: ECSA allows constructive exchanges with the various European stakeholders, while Armateurs de France expresses the expectations of its member shipowners and relays the sector's concerns to the national institutions. It is these synergies that make us collectively stronger."

Martin Dorsman,
Secretary General of ECSA



Mega Express Four and Corsica Marina Seconda, Corsica Ferries

Supporting decarbonisation

The European Commission has wasted no time in beginning to implement the European "Green Deal". A preliminary impact assessment to broaden the current scope of the EU ETS¹ directive and a consultation relating to it have both been published. Armateurs de France, on behalf of its members, responded to this consultation and also contributed to the public position of its European counterpart, ECSA. While French shipowners do wish to find solutions for the decarbonisation of the sector, these must be international and not speculative in order to respect the competitiveness of European shipowners and preserve their cash flow visibility.

The organisation strongly urged the European Commission to carry out a thorough economic impact assessment. The study should examine the merits of introducing a

fund within the framework of the market mechanism, all of whose revenues would support research, development and innovation projects for zero and low-carbon fuels and clean propulsion technologies that are not yet available today.

Another concern is that smaller shipowners may find it difficult to cope with the additional administrative burden and, above all, hard to trade their allowances on the market on fair economic terms.

In parallel, Armateurs de France experts are monitoring the implementation of the carbon border adjustment mechanism, which will be developed in 2021 and would regulate distortions of competition with international shipping companies. Any financial mechanism will have to be progressive, coherent and compatible with the future market mechanism adopted by the IMO.



"2020 was disastrous for Brittany Ferries and the first half of 2021 is just as challenging. We first suffered the effects of Brexit following the announcement of the referendum result, then those of the halt in traffic with lockdowns on both sides of the Channel and public health measures, but also a general atmosphere that doesn't lend itself to travel. We lost 80% of our passenger volumes in 2020. We are really counting on serious support from the public authorities."

Jean-Marc Roué,
Chairman of Brittany Ferries

76%
of EU exports travel by sea

40%
of the world fleet sails under the flags of EU member states

Economic impact of shipping:
€147 Bn
of EU GDP

Preserving access to finance

Meanwhile, the Taxonomy regulation came into force in June 2020. It sets out financial and non-financial reporting obligations for public and private financing authorities that are directly applicable in national law. The European Commission has drafted its first delegated act aimed at listing all sustainable economic activities to guide financial institutions in their investments.

Armateurs de France also responded to this consultation. One of the issues at stake is to include shipping companies, and more particularly to qualify LNG carriers and oil tankers on the same footing as other vessels. Developments are to be expected in 2021, as the delegated act has not been finalised following an informal block by the European Council. A social taxonomy is also programmed for 2023.

Brexit: writing the future

Another European milestone closely monitored by Armateurs de France was the signing of a trade coopera-

tion agreement between the EU and the UK on 24 December 2020. The agreement includes a chapter on international shipping services and other aspects likely to have an impact on French shipping companies, such as the issues of the "level playing field", Government aid for shipping and rules of origin for certain exporters. Generally speaking, the aspects mentioned in the chapter on international shipping services are more consensual for our operators and for European operators. The content is very close to that proposed by the Commission during the negotiations, with which Armateurs de France and ECSA were generally in agreement. Among the points of increased vigilance, one could mention cabotage, which is not covered by the agreement. There is no provision that only UK-flagged vessels will be able to operate between two UK ports. Armateurs de France is particularly attentive to the respect of this point, which is vital for cross-Channel operators and for service vessels operating in British waters. —

Cross-Channel Parliamentary Meetings



On 11 February 2021, the French Maritime Cluster organised several debates on the question: "In the run-up to the future vote on the distribution of the EU Brexit Compensation Fund, what fiscal, social, legal and competition solutions does the legislator have?" Due to Covid precautions, only a few parliamentarians and representatives of manufacturers concerned were present alongside Frédéric Moncany de Saint-Aignan, Chairman of the French Maritime Cluster, and Jean-Emmanuel Sauvée, Chairman of Armateurs de France. Some 30 other guests joined in remotely, including an administrator from the European Affairs Committee, parliamentarians, representatives of the three cross-Channel regions, port CEOs and journalists.

¹ Emissions Trading System

ALL HANDS ON DECK



The choppy year that we have experienced has led to profound changes in our lives, and yet the values of Armateurs de France have remained intact throughout. From the team's commitment to defending the French flag to the award of the Blue Charter Trophy, its fundamentals haven't been washed away in the storm!

A QUITE PARTICULAR YEAR

The crew members at Armateurs de France share their impressions and highlights of 2020 and those of 2021, a year which is already well underway.



"No one spared any effort in a year when the notion of service was more than ever the leitmotif of the Armateurs de France teams. In the midst of the COVID-19 pandemic, we ensured that our members were informed in real time about quarantine measures, furlough arrangements, Government-backed loans, the stimulus plan, transit visa issues, renewal of seafarers' certificates, etc. We supported them both collectively and individually! The two highlights for our organisation were the development of our Strategic Plan for the Merchant Navy and the launch of the Fontenoy du Maritime consultation by the new Minister for Marine Affairs. We hope that the results of these transformational initiatives will be up to the challenges!"

Jean-Marc Lacave, Managing Director of Armateurs de France

"In 2020, tenacity was the watchword within the team. In addition to the various issues related to COVID-19, we also sought solutions to organise our meetings with members who could not travel. We tested several video-conferencing systems and software. Zoom ended up earning the unanimous support of both the team and, above all, of our contacts. Let's hope that 2021 will be a sign of general recovery, an end to the crisis for our members who have been severely affected, and that our exchanges will no longer take place exclusively by webcam!"

Philippe Costa, Head of general affairs



"The past year was obviously a tough one to go through... however, the return to the office and to a social life after the first lockdown was a real relief. Like all our member companies, Armateurs de France pays particular attention to environmental protection and employee well-being, even in times of crisis. The recent introduction of a mobility bonus for team members who cycle to the office is an excellent illustration of this!"

Marie-Claire Denicourt, Head of accounting and human resources

"The health crisis has not made the climate crisis go away: indeed, quite the contrary. Environmental issues are still a priority, and our commitments to the issue are growing! As our activities are international in nature, I have been very taken up by the work of the IMO, particularly with the development of short-term measures, a major step towards reducing CO₂ emissions from vessels. Closer to home, I am delighted to have organised, despite the crisis, a workshop devoted to wind propulsion: this solution has many advantages and has its place in the energy mix to decarbonise the sector."

Nelly Grassin, Head of quality and technical safety, security and environmental affairs



"If I had to sum up 2020 in one word, I would say rewarding. The hard work and energy we devoted to our jobs helped our members find solutions and gain visibility in a very uncertain period. Fortunately, we had plenty of team spirit, efficiency and solidarity! I spent a lot of time on defending the specific needs of our members before public institutions so that they could benefit from appropriate support. I was also lucky enough to see my duties evolve towards increasingly institutional missions."

Laurene Niamba, Head of public and legal affairs

"Given the coronavirus situation, we remained more mobilised than ever to respond as best we could to the changing needs of shipowners. In particular, the European institutions published or proposed numerous legal texts to adapt the existing measures to the crisis. We had to be very reactive! Another highlight was the Brexit deal on 24 December 2020. This is a major concern for cross-Channel operators, but also for service vessels operating off the British coast. We were very much in demand on this subject. Fortunately, the Armateurs de France team always remained cohesive and full of anticipation."

Mathilde Prete Capasso Torre, Head of European affairs



"Promoting the emergence of concrete and effective solutions to strengthen the appeal of financing in the shipping sector; preserving, and if necessary consolidating, the mechanisms that enable French shipowners to be competitive on the international market... I have several new objectives! Having previously been a lawyer, working on environmental issues and communication, I took on new duties at the beginning of the year which bring their own set of challenges. However, this is a change in continuity: protecting of the planet means investing - and therefore financing!"

Cécile Rafat, Head of economic, tax and statistical affairs

"On Friday 1 May, International Labour Day, vessels sounded their horns in ports all over the world, in tribute to the 1.6 million seafarers, essential workers and unsung heroes of our daily lives. Coordinated by the ICS and in a spirit of solidarity, all the national shipowners' associations wanted to raise public and Government awareness of the situation of seafarers stranded at sea or on land. A very moving operation that I will never forget!"

Agnès Rincé, Head of communications



"2021 is off to a flying start for me! I joined Armateurs de France in January after having been an intern a few months previously. I am very excited to be back in the team! My main challenge for 2021? To respond as well as I can to the concerns of our members: piracy, cybersecurity, port issues... The prospect of being ever more present for our contacts, being able to exchange face-to-face with them again soon, is a source of energy and motivation."

Pierre-Antoine Rochas, Technical, security, safety and port affairs officer

"This extraordinary year was very busy! First of all, because we had to adapt to a way of working that was very different from what we were used to. But also because our member companies needed more support. The pandemic generated new and unexpected problems to which we had to respond quickly. Crew changes, length of service time on board, furlough, vaccinations... all of these concerns marked the year, and they're not going to go away any time soon."

Maha Vandewalle, Head of social affairs and training



COLLECTIVE MISSIONS

2020 at a glance



Defending and promoting the interests of French shipping companies

- Drafting of the **PSMM** (see pages 10-11)
- 55** meetings on the Covid crisis, with ministries and the French Directorate for Maritime Affairs
- 5** plenary meetings of the CSMM¹



Representing companies before French and international bodies

- 12** meetings with French parliamentarians
- 100+** ECSA meetings
- Creation of a "maritime taxonomy" **task force**
- Contribution to Introduction of **QWIO**² project



Communicating about and promoting the image of shipping

- 1** infographic on "Underwater noise caused by shipping traffic" in partnership with IFAW³
- More than **30** interviews in the media and more than **100** "shipping" press articles quoting Armateurs de France
- 43%** more LinkedIn followers
- 15%** more Twitter followers



Informing and advising its members

- 3** General Assembly and **5** executive committee meetings
- 200** social consultations
- 5** meetings dedicated to changes in GHG regulations at the IMO
- 320** market intelligence reports published, dealing with all the organisation's fields of expertise



Negotiating collective bargaining and branch agreements

- 9** meetings of social affairs committee
- 16** joint committees
- 4** branch agreements signed



As a holder of Quali'OP certification, Armateurs de France constantly ensures it provides high-quality services.

¹ High Council for the Merchant Navy
² Quiet West Indian Ocean: a programme running to 2025 consisting of scientifically measuring the noise emitted by shipping activities and assessing its effects on sea life in the West Indian Ocean and, working in collaboration with the private sector and the relevant authorities,

introduce concrete measures, accepted by governments, shipowners, ports and international authorities, to avoid collisions and mitigate noise.
³ International Fund for Animal Welfare. Other partners: Ministry for the Ecological Transition, Ministry for Marine Affairs, French Office for Biodiversity.



CANOPEE RECEIVES THE HONOURS



View of Canopée, Jifmar and Zéphyr & Borée

In 2020, Armateurs de France awarded its Blue Charter Trophy to the company Jifmar Offshore Services for its future hybrid-powered cargo vessel: *Canopée*. A pioneering and inspirational project for the eco-energy transition of world shipping.

Make no mistake about it: French shipowners are key movers in sustainable and responsible shipping, founded on technological innovation and social responsibility. Back in 2003, Armateurs de France created its Blue Charter, the concrete illustration of its long-standing efforts in favour of high-quality, safe shipping that is respectful of people and the environment. Since then, French shipowners have illustrated their desire to go even further by introducing new commitments into the Charter that reflect their high ambitions and new challenges, revolving around three main priorities: placing people at the heart of concerns, acting to protect the environment and maintaining the highest levels of safety. One noteworthy event in 2020 was the incorporation of the Blue Charter into Armateurs de France's articles of association,

making membership of both the organisation and the Charter inseparable. It is within this framework that the Blue Charter Trophy pays tribute every year to the environmental and social exemplarity of the French shipping sector. In 2020, the judging panel, chaired by Benoît Delahaye, Executive Vice-President of the company La Méridionale (the 2019 winner) chose to award the Trophy to the *Canopée* project developed by Jifmar. Operated by Alizés, the joint venture concluded in 2019 between Jifmar and Zéphyr & Borée - a new member of Armateurs de France - , *Canopée* will come into service in 2022, transporting the parts of the Ariane 6 launcher from Europe to French Guiana. Fitted with a conventional main propulsion system and four automated wing-sails, connected to a weather routing system that will make it easier to navigate with the wind, the vessel will be capable of reducing its sulphur, nitrogen, particulate matter and CO₂ emissions by up to 30%. A true concentrate of exemplary technological innovations that can be replicated on an industrial scale! —

The 2020 judges

- **Catherine Chabaud**, Member of the European Parliament
- **Damien Chevallier**, Alternate Permanent Representative at the IMO and Maritime Attaché to the French Embassy in the UK
- **Françoise Gaill**, Vice-President of the Ocean & Climate Platform and Emeritus Research Director at CNRS¹
- **Thibaud Teillard**, Journalist at *Le Marin*

Judges' Special Award

Among the other candidates which also included Orange Marine and TOWT, the judges presented a special award to **Louis Dreyfus Armateurs** for its continued implementation of a wide-ranging environmental policy. Its service operation vessel *Wind of Change* (see page 28), launched in 2019, earned the plaudits of the judges who also wished to acknowledge the unstinting political commitment of Philippe Louis-Dreyfus to the acceleration of the energy transition, all over the world, in particular through his campaign to reduce vessel speed.

¹ National Centre of Scientific Research

MERCHANT FLEET OPERATING UNDER THE FRENCH FLAG

Transport fleet: 186 ships

SHIP TYPE	Quantity	GT ¹	DWT ²
CARGO	16	34,994	22,695
CEMENT CARRIER	2	4,823	6,050
CONTAINER SHIP	19	10,297	2,867
CRUISE SHIP	1	9,403	4,871
FERRY	12	110,423	14,178
GAS CARRIER	36	1,933,194	3,675,893
PASSENGER SHIP	28	2,487,620	2,617,598
RESEARCH AND SUPPLY VESSEL	18	145,514	64,260
RORO SHIP	46	784,502	146,339
TANKER	8	504,612	428,549

Service fleet: 240 ships

SHIP TYPE	Quantity	GT ¹
BUOY TENDER	10	3,473
CABLE LAYER	10	104,637
DREDGER	15	36,446
MARITIME WORKS SUPPORT VESSEL	58	148,059
OFFSHORE SERVICE VESSEL	2	1,081
PILOT BOAT	1	499
RESEARCH VESSEL	6	14,099
SAND DREDGER	119	44,939
TRAINING SHIP	5	10,596
TUG BOAT	14	13,091

426

ships under the French flag

10 YEARS

The average age of the French fleet compared to 15 years worldwide³

Source: Mission Flotte de Commerce (Merchant Fleet Mission)

1 Gross Tonnage
2 Deadweight Tonnage
3 At 1 July 2020

THE MEMBERS OF ARMATEURS DE FRANCE

ABCRM • AGENCE MARITIME DE L'OUEST • ALKA MARINE SOLUTIONS • BESSÉ • BOLUDA FRANCE • BOURBON OFFSHORE SURF • BRITTANY FERRIES • CAN • CARIBBEAN LINE • CATLANTE CATAMARANS • CEDRE • CCI BAYONNE • COMPAGNIE POLYNÉSIENNE DE TRANSPORT MARITIME • CMA CGM • COMITÉ MARSEILLAIS DES ARMATEURS DE FRANCE • CONSEIL DÉPARTEMENTAL DE CHARENTE-MARITIME • CONSEIL RÉGIONAL DE BRETAGNE • CORSICA FERRIES • DFDS SEAWAYS • DRAGAGES, TRANSPORTS ET TRAVAUX MARITIMES • EYSSAUTIER • FÉDÉRATION FRANÇAISE DES PILOTES MARITIMES • FILHET ALLARD • FIMAR • FRANCE LNG SHIPPING • GASPE • GAZOCEAN • GENAVIR • GEOGAS MARITIME • GREEN SHIPPING HOLDING • GREENSHIP GAS • GROUPE LHD • HELVETIA ASSURANCES • INGEPAR • IX BLUE • JIFMAR OFFSHORE SERVICES • KARIBS LINK • LA MÉRIDIONALE • LD BULK • LES ABEILLES INTERNATIONAL • L'EXPRESS DES ÎLES • LOUIS DREYFUS ARMATEURS • MARFRET • MARITIMA-SOGESTRAN • MARITIME NANTAISE • MEDLINK PORTS • MERCERON TP • NEOLINE • ORANGE MARINE • PENN AR BED • PILOTES DE DUNKERQUE • PILOTES DE LA GIRONDE • PILOTES DE LA LOIRE • PILOTES DE LA SEINE • PILOTES DE NICE/CANNES/VILLEFRANCHE • PILOTES DES PORTS DE MARSEILLE ET DU GOLFE DE FOS • PILOTES DU HAVRE/FÉCAMP • PLASTIC ODYSSEY EXPEDITION • PONANT • PWC PARTNER • SEAOWL FRANCE • SEAOWL MARINE • SOCATRA • SYNDICAT PROFESSIONNEL DU LAMANAGE DES PORTS DE LA MANCHE, DE LA MER DU NORD ET DE L'ATLANTIQUE • SGS FRANCE • SOCIÉTÉ DE TRANSPORTS FLUVIO-MARITIMES DE L'OUEST • ST MANAGEMENT • SUDILES • THOMAS SERVICES MARITIMES • TOWT - TRANSOCEANIC WIND TRANSPORT • TOTAL ACTIVITÉS MARITIMES • V.SHIPS FRANCE • ZÉPHYR & BORÉE



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