

2022/2023  
ANNUAL REPORT

# 120 YEARS OF FUTURE

Armateurs  de France



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## 120 YEARS OF FUTURE

We would like to thank our member companies and our partners  
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**JEAN-CLAUDE CHARLO,**  
Managing Director, DFDS Seaways

Cross-Channel shipping is experiencing a new earthquake: social dumping. Historically, the ferry companies operating on the English Channel would opt for a national flag, which would be either French or British. Irish Ferries and then P&O undermined this balance by operating under the Cypriot flag, which is socially more economical and opens the way to salaries and working conditions that are in no way comparable with those of the French flag. This allows them to have a wage bill 80% lower than those of ships under the French

flag. This competitive distortion jeopardises the economic health of the companies that did not make this choice. With the help of Armateurs de France, we are fighting to prevent social dumping from becoming the norm on cross-Channel shipping. French ferries account for three quarters of full-French seafaring jobs. It is a matter of national sovereignty. Armateurs de France is playing an active role in this battle, which brings politicians, trade unions and shipowners together around a single goal: defending the French flag.

## EDITORIAL “WE ARE FIGHTING TO PREVENT SOCIAL DUMPING FROM BECOMING THE NORM ON CROSS-CHANNEL SHIPPING”

Social dumping is not just about a competitive struggle between shipowners, in which seafarers and their rights are merely an adjustment variable. Social dumping, which is now progressively spreading to cross-Channel and Mediterranean activities, is above all the result of major deregulation that can be attributed to the vacuity of European legal texts on maritime affairs. We will not dwell on the “posted workers” directive, which deliberately “forgets” seafarers. Neither will we dwell on those unprincipled States that, having barely arrived in the European family in 2004, shamelessly sold the European passport to the highest bidder and handed over their deregulated national flags to unscrupulous shipowners. Social dumping has become a crucial issue in the last twenty years because it determines the future of the French Merchant Navy. If tomorrow there is still a merchant navy with a national flag. Because

perhaps, in the long term, the French flag no longer has any reason to exist. It is up to the Government, or rather the European Union, to say so, to confirm it and to take responsibility. If the wish of the Community authorities is to see deregulated flags win the day, exploiting seafarers without any social or salary reserves in Europe, in the name of ultra-liberalism... then the European Union should say so! But when I made my Saint-Malo plea, I noticed elected representatives from all sides and all regions joining me in advocating a different vision of Blue France and its values. A law will probably be adopted this year in France: three MPs are proposing a national framework. In the UK, a text is being voted on in the Commons. In a year's time, in the spring of 2024, the European elections will be held. It remains for us, together, to finally force the subjects of French shipping onto the agenda of this upcoming campaign!



**JEAN-MARC ROUÉ,**  
Chairman of the Supervisory Board,  
Brittany Ferries

# OUR HISTORY HAS A FUTURE



# EARLY DAYS OF ARMATEURS DE FRANCE



This mosaic of the port of Narbonne is the most ancient depiction of a boat hoist discovered to date in the world (1<sup>st</sup>-2<sup>nd</sup> centuries AD, Ostia, Italy)

## ALLIANCES DATING BACK TO ANCIENT TIMES

History shows several examples of interest groups formed by shipowners. In the second century BC, the Poseidoniasts of Berytos formed a corporation. They called themselves “merchants, shippers and warehousemen”. In France, the oldest known groups of shipowners date from the 2<sup>nd</sup> century AD: the Narbonne naviculars and the Arles naviculars. The latter were active throughout the Mediterranean world.

## BEFORE 1903

### 13 JANUARY 1903 ESTABLISHMENT OF COMITÉ CENTRAL DES ARMATEURS DE FRANCE

At the end of 1902, with the formation of large employers' unions in full swing, the need to unite behind the interests of French shipowners became obvious. The Bordeaux shipowner Adolphe Bordes managed to persuade his Marseille counterpart Alfred Fraissinet that this committee would act in accordance with regional specificities. Bordes also managed to convince André Lebon, Chairman of the Compagnie des Messageries Maritimes, and Salomon Halfon, Chairman of the Banque Transatlantique, that this grouping would firmly defend the interests of the French shipping industry at a time when maritime issues were becoming more international. Thus, the Comité Central des Armateurs de France (CCAF) was founded on 13 January 1903. Within a few months, the CCAF represented almost all French tonnage, amounting to 1.6 million net tons. André Lebon was Chairman until 1909.



André Lebon



Adolphe Bordes

### ADOLPHE BORDES, CHAIRMAN OF CCAF

This shipowner from Bordeaux, with a “robust” temperament, was part of a family that prospered thanks to a unique mode of transport: the sailing ship. At the turn of the 20<sup>th</sup> century, Armement Bordes was the world's leading sailing ship owner with its 35 magnificent clippers. Refusing to take any risks by compromising on his ships, Adolphe Bordes resigned from the chairmanship of the CCAF after clashing with Henry Chéron, the unpopular Under-Secretary of State for the Navy.

## 1909-1910

### 1910-1918 WEATHERING THE FIRST WORLD WAR

Jules Charles-Roux, a major industrialist and shipowner from Marseille, and a close acquaintance of Alfred Fraissinet, became Chairman of the CCAF at a time when the European economies were heading for war. For almost the entire duration of the war, he was able to mobilise the entire merchant navy in the vital role of supplying a nation at war. Ship safety issues were at the heart of the CCAF's concerns during his chairmanship, which ended abruptly with his death on 6 March 1918.

§ III.- Conduite à suivre quand un sous-marin ennemi est en vue.  
A.- Le Capitaine, qui aperçoit un sous-marin ennemi, ne doit pas penser à se rendre, mais doit faire au contraire l'impossible pour écarter un danger qui le menace: en manœuvrant avec décision, conformément aux indications qui seront données plus loin, il a beaucoup de chances d'y parvenir. Mais, même en supposant qu'il ne réussisse pas, la situation n'en sera pas rendue plus mauvaise pour le navire et son équipage.  
Tout navire qui se rend est en effet immédiatement coulé par l'ennemi et le personnel du bord, si on lui a donné le temps de se réfugier dans les embarcations, est abandonné sur place. Si un navire ne réussit pas dans sa tentative de résistance et est atteint par une torpille, la nature de l'avarie laissée, en général, largement le temps d'évacuer les embarcations.  
Ainsi, dans un cas comme dans l'autre, le navire est perdu et l'équipage est abandonné dans les embarcations de sauvetage.  
Donc, pas d'hésitation possible: il faut résister, puisqu'on le faisant on ne court pas plus de risques et qu'on a de grandes chances de se sauver.  
B.- Si on aperçoit à petite distance sur l'avant un sous-marin en surface ou un périscope, il faut mettre immédiatement le cap sur lui en forçant de vitesse; on l'éloigne ainsi sûrement à mesure qu'il se rapproche et on le met hors d'état de se servir de ses torpilles.

These instructions to ships on how to act in the event of a German submarine attack are from a confidential circular issued by the CCAF management to French shipowners on 11 March 1915

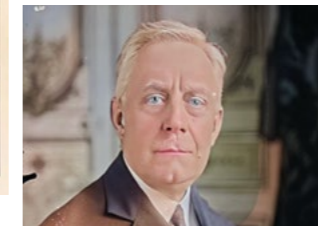


Poster advertising the French Line

## 1925-1928

### THE ROARING TWENTIES

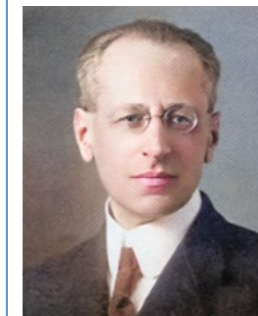
A close associate of the Pereire family, John Dal Piaz was renowned for his perpetual quest for innovation. In 1920, having risen through the ranks, he became Chairman of the French Line, which had been heavily impacted by the war. With a perfect feel for the zeitgeist of the 1920s, he successfully developed winter maritime tourism to make the company's ships more profitable. His arrival as chairman of the CCAF was marked by his desire to see France impose its maritime and merchant force on the seas, by launching “the most luxurious and beautiful liners to compete with those from Germany or America”.



John Dal Piaz

### 1928-1943 BETWEEN RECESSION AND DISSOLUTION

Chairman of the Compagnie des Messageries Maritimes since 1925, Georges Philippart became Chairman of the CCAF following the death of John Dal Piaz in 1928. While the French Merchant Navy had been experiencing a continuous decline in tonnage since 1930, he managed to turn things around in 1939. Regrettably, the fall of France in 1940 prevented him from continuing this work. He was supported by Paul de Rousiers until 1934, then by Jacques Marchegay during the Occupation. Georges Philippart protected the interests of French seafarers by subtly hindering the fulfilment of the occupier's demands. When the Vichy regime dissolved the CCAF on 2 November 1943, 66% of its assets and French merchant ships were seized by the occupier.



Georges Philippart

### AFTER 1945 THE STORY GOES ON



Louis Nicol

The CCAF was reinstated in 1945. Its new Chairman, Louis Nicol, had the onerous task of restoring the French Merchant Navy, reduced to ruins, and the freedom of enterprise of shipowners. The organisation, since renamed Armateurs de France, celebrates its 120<sup>th</sup> anniversary in 2023!

## 2022 IN PICTURES



11 FEBRUARY

### One Ocean Summit

As announced by President Macron in September 2021 at the IUCN Congress, the One Ocean Summit took place in Brest. Among the many announcements made of measures to protect the oceans, Armateurs de France can highlight two, supported at the highest echelons of government: the new dimension of the Green Marine Europe label, and the creation of an institute for the ecological and energy transition of the maritime sector (T2EM).

21 TO 25 MARCH

### Shipping Employment Week

The aim of this week was to highlight all the job disciplines in the French shipping industry, the companies looking to fill vacancies and training organisations. Armateurs de France made its contribution by notably producing a film on the job of seafarer.



OUR HISTORY HAS A FUTURE



21 APRIL

### Environment committee aboard *Le Commandant Charcot*

Armateurs de France and its members met up aboard Ponant's *Le Commandant Charcot*, the first hybrid electric polar exploration vessel. The meeting offered an opportunity to review the latest global, European and domestic regulatory developments, and facilitate discussions between shipping professionals and form common positions which would then be defended by Armateurs de France.

27 JUNE

### Green Marine Europe reveal



It was in Marseille on the eve of the EuroMaritime exhibition that this year's new GME label awardees were unveiled. The announcement conference brought together Eric Banel, Director General for Maritime Affairs, Fisheries and Aquaculture (DGAMPA), Claire Pitollat, MP for the Bouches-du-Rhône (2<sup>nd</sup> constituency), and Jean-Emmanuel Sauvé, Chairman of Armateurs de France.

15 JUNE

### ADF Social Day

For the second edition of this theme day, Armateurs de France welcomed to its offices the legal advice firm HFW, the *Agence Nationale pour l'Amélioration des Conditions de Travail* (ANACT - National Agency for the Improvement of Working Conditions) and representatives from DGAMPA. On the agenda: talks on topical social issues, training bridges, and aid for shipping employment.

26 OCTOBER

### Social dumping meeting

In response to the spread of social dumping, Hervé Berville, The Minister of State for Marine Affairs, attached to the Prime Minister, was invited to the premises of Armateurs de France at the initiative of Jean-Marc Roué, Chairman of the Supervisory Board of Brittany Ferries, in the presence of Jean-Claude Charlo, Managing Director of DFDS, as well as ratings and officers trade unions. The French cross-Channel stakeholders then met in Saint-Malo on 7 November to call on members of parliament and elected representatives to combat social dumping.



OUR HISTORY HAS A FUTURE



8 NOVEMBER

### Signature of a Marine Renewable Energy (MRE) charter at the *Assises de l'économie de la mer*

Armateurs de France, France Énergie Éolienne and the *Syndicat des Énergies Renouvelables* (Renewable energy association) came together at the *Assises de l'économie de la mer* to sign a charter of commitment to contribute to the development of a French offshore wind power services sector.



8 NOVEMBER

### Presentation of Blue Charter Trophy at the Assises de l'économie de la mer

Armateurs de France presented Marfret with the Blue Charter Trophy at the 17<sup>th</sup> edition of the *Assises de l'économie de la mer*. Committed to a greener transportation system, Marfret has opted for the most appropriate form of assisted propulsion for its vessels, by fitting the *Marfret Niolon* with turbosails. Goal: cut the ship's fuel consumption by 10 to 15%.



16-17 NOVEMBER

### Security-safety committee and French Navy - Armateurs de France meeting in Toulon

The security and safety committee met up aboard Corsica Ferries' Mega Andrea on the eve of the meeting between the French Navy - Armateurs de France Meeting. During this annual event, the French navy and Armateurs de France exchanged and shared their feedback, expertise and best practices in the field of security and the exchange of shipping information.

30 NOVEMBER

### Annual Armateurs de France gala evening

At its annual gala evening held in Pavillon Cambon in Paris, Armateurs de France signed a partnership with the *Musée national de la Marine* to promote activities and occupations in transport and shipping services to audiences of all horizons. Armateurs de France also signed a partnership agreement with French Maritime Academy (ENSM) with the aim of reinforcing collaboration supporting the academy and promoting jobs in shipping.



## THE TEAM AT ARMATEURS DE FRANCE

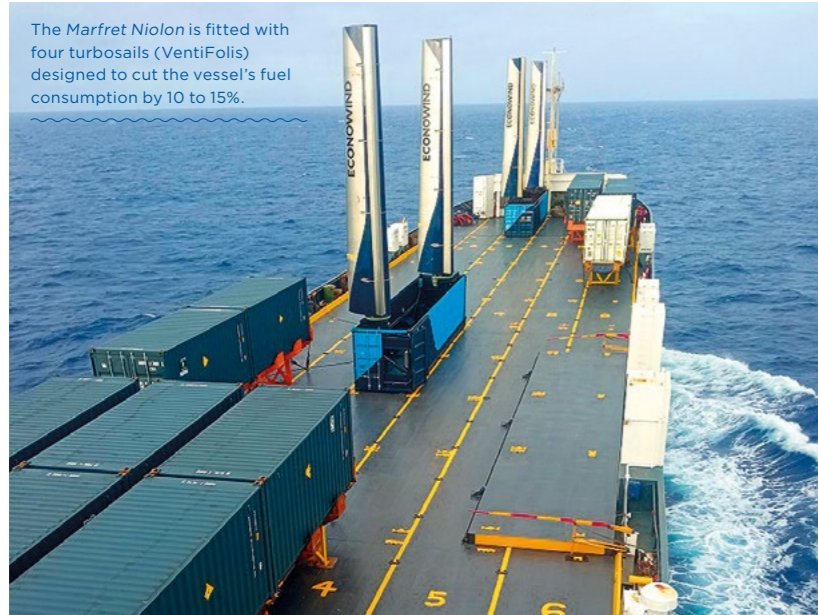


Seated (from left to right): Laurène Niamba, Head of institutional relations and legal affairs; Nelly Grassin, Head of environmental affairs; Agnès Rincé, former Head of communications; Jean-Philippe Casanova, Managing Director; Cécile Rafat, Head of economic, tax and statistical affairs; Maha Vandewalle, Head of social affairs and training.

Standing (from left to right): Martin Carceles, Economic and tax affairs officer; Marie-José Gharjos, Communications officer; Philippe Costa, Head of general affairs; Marie-Claire Denicourt, Head of accounting and human resources; Mathilde Prete Capasso Torre, Head of European affairs; Pierre-Antoine Rochas, Head of security, safety and port affairs.

## MARFRET AWARDED THE BLUE CHARTER TROPHY

The Marfret Niolon is fitted with four turbosails (VentiFolis) designed to cut the vessel's fuel consumption by 10 to 15%.



### Members of the 2022 jury

- **Jean-Michel Berud**, President of Jifmar Offshore Services
- **David Bolduc**, President of Green Marine
- **Adeline Descamps**, Editor-in-Chief of *Journal de la Marine marchande* (JMM)
- **Rémi Mejecaze**, Head of Merchant Fleet mission
- **Sophie Panonacle**, MP for Gironde
- **Sabine Roux de Bézieux**, President of *Fondation de la Mer*



*"At Marfret we are committed to making our energy transition happen and developing our position as a company apart from the rest, in particular by extending the turbosail system to other vessels in our fleet. We firmly believe in the future of containerisation and energy, and that's what led us to opt for the technology developed by eConowind. All the ingenuity of the container, the foundation in many ways of our business, has here been applied to a system to assist the ship's propulsion."*

**Guillaume Vidil**,  
General Manager of Marfret

Armateurs de France presented the Blue Charter Trophy (*Trophée de la Charte Bleue*) in 2022 to the shipping company Marfret at the 17<sup>th</sup> edition of the *Assises de l'économie de la mer* in Lille.

The jury, chaired by Jean-Michel Berud, President of the company Jifmar Offshore Services (the 2020 winner) and comprising well-known figures from the shipping world (see box above) chose to distinguish the sail project presented by Marfret. In its commitment to a greener transport sector, Marfret ran a study to choose the most appropriate assisted propulsion system for its vessels, and opted for the innovative system supplied by the Dutch firm eConowind. At the end of January 2022, the Marfret Niolon was fitted

with four turbosails (VentiFolis) designed to generate fuel savings of 10 to 15%, thereby reducing its greenhouse gas emissions. The whole system fits in a 40 foot container, while the wing-shaped sails, which are foldable, can automatically rotate to find the optimal angles in relation to the apparent wind. The quartermaster can hoist the sails by remote control depending on the weather conditions. As the eConowind containers can be easily installed and transferred from one ship to another, this flexible solution is suitable for a wide variety of vessels (ro-ro, container ships, bulk carriers, tankers). The aim is to provide an environmentally friendly system for its entire RoRo fleet in the long term. —

# OUR VALUES ARE THE FUTURE



# AN OCEAN OF OPPORTUNITIES ON THE HORIZON

All lights are green for the French shipping sector, its jobs and its decarbonisation. Here we take a look at past actions and future ambitions with Jean-Emmanuel Sauvée, Chairman of Armateurs de France and Jean-Philippe Casanova, Managing Director.



The Malaga Knutsen is the first LNG carrier of Knutsen LNG France registered under the Rif register

## What is your assessment of the past year?

**JEAN-PHILIPPE CASANOVA** 2022 was marked by the persisting symptoms of the Covid crisis on shipping, crews, and the war in Ukraine which raised many problems, the first among them being the thorny issue of Russian and Ukrainian seafarers. This series of crises is taking its toll on seafarers. Recognised as essential workers by the Government and the IMO (International Maritime Organization), they work tirelessly to keep the global economy running. I am referring to the supply chain of course, but also to services such as the maintenance of submarine cables, which are so crucial to intercontinental digital exchanges.

**JEAN-EMMANUEL SAUVÉE** In France, we can welcome the progress made as a result of the 2021 Fontenoy du Maritime process. Green asset overdepreciation is becoming established little by little, and the finishing touches are being made to the first submissions. The extension of aid for maritime employment is also excellent news for the competitiveness of the French flag. The 12 tasks of the ENSM (repositioning of courses, changes in the learning chain, etc.) and the doubling of the number of officers trained by 2027 are a step in the right direction, in response to the growth of the sector, which accentuates the need for skills. In this respect, we should salute the appointment of the academy's new leadership, which whom we entertain close relations (see box p. 17). Finally, we should emphasise the improvement in social dialogue with our crews' representative unions, which materialised with the signature of the agreement on 30 November which raises officers' minimum pay levels. There are signs of progress, even if the road ahead is still long. →

**"GREEN ASSET OVERDEPRECIATION IS BECOMING ESTABLISHED LITTLE BY LITTLE. THE EXTENSION OF AID FOR MARITIME EMPLOYMENT IS ALSO EXCELLENT NEWS FOR THE COMPETITIVENESS OF THE FRENCH FLAG."**

**JEAN-EMMANUEL SAUVÉE**

## "FRENCH PLAYERS ARE AT THE FOREFRONT OF ENVIRONMENTAL ISSUES AND INNOVATION COMPARED WITH THEIR INTERNATIONAL COMPETITORS."

JEAN-PHILIPPE CASANOVA



### How is the French Flag faring?

**J.-P. C.** We can be immensely satisfied with the resilience shown by the French flag which, in spite of the uncertainties and difficulties, is growing solidly. We should recall that the continuation of the economic recovery at the beginning of 2022, with growth in consumption that was strong in the USA and more measured in Europe, combined with the continuation of the zero-Covid policy in China, caused logistical strains. At the end of 2022, these returned to pre-Covid levels with the slowdown in global demand. This economic downturn raises fears of overcapacity in view of orders for new ships from shipowners.

### In the first six months of 2022, France held the presidency of the Council of the European Union. Did it help to make progress on subjects that are important to Armateurs de France?

**J.-P. C.** Timescales in politics are very different from timescales in business. However, although the projects may seem long in coming to fruition, they are making progress. The foundations for a European social dialogue have been laid. The question of social dumping, both outside and inside Europe, which is a predominant issue for French shipowners, was addressed at the colloquium on jobs and skills at La Rochelle on

9 February 2022. On a backdrop of global competition, French companies must be able to do battle on a level playing field, according to the same rules. Competition is healthy as long as it is fair and just.

**J.-E. S.** Fighting social dumping requires a collective response at European level. By setting down the key principles and providing for better coordination between States on the control of social standards, the convergence towards a European social model is a guarantee of competitiveness for employment. Furthermore, this harmonisation, which is indispensable, would also ensure that European guidelines on training are harmonised, to improve seafarers' professional mobility.

### 2022 was the year of a presidential election and a government reshuffle. What relations to you entertain with the Minister of State for Marine Affairs, attached to the Prime Minister

**J.-P. C.** We have a relationship of trust. Hervé Berville is a man of action who listens to concerns. He has the ambition of the shipping sector in his bones. We work cooperatively and enthusiastically to develop the French flag and jobs. The same goes for making progress on social dialogue and driving collective bargaining.

**J.-E. S.** Generally speaking, the Government's undertaking is clear and consistent, as we saw at the One Ocean Summit in February 2022. There were many announcements made on the protection of the oceans, two of which have the support at the highest echelons of the Government and with which Armateurs de France is associated: the new dimension of the Green Marine Europe label for maritime stakeholders wishing to underline their environmental credentials, and the creation, still ongoing, of an institute for the ecological and energy transition of the maritime sector.

### What are the priorities of Armateurs de France for 2023 and the following years?

**J.-P. C.** Armateurs de France is keen to support the French flag to develop jobs and social promotion. It is clear for all to see that the social elevator would benefit from being a little better oiled to enable seafarers to rise through the ranks. In 2023, we also hope to see a successful conclusion to our discussions with the unions on minimum pay levels for the rating branch.

**J.-E. S.** Social issues, training, employment and the ecological transition are all workstreams that mobilise our teams in their everyday work. We are working behind the scenes to improve decarbonation financing for ships (Bpifrance strategic project guarantee, green depreciation), and make it more affordable and pertinent. There is a lot at stake here, given that French players are at the forefront of environmental issues and innovation compared with their international competitors. Here I could mention firms like Neoline and TOWT, which innovate with novel sail-assisted cargo ships, or Zéphyr & Borée and its hybrid cargo vessel. It is also good to see some players capitalising on their economic success and choosing to reinvest a proportion of their profits in the sector. For example, we can applaud the initiative of CMA CGM which launched a 1.5 billion euro Energy Fund to accelerate the energy transition to reach net zero by 2050.

## Engaged in the success of ENSM and its students

Armateurs de France continues to provide enduring support to the French Maritime Academy (ENSM), with which it signed a new partnership agreement last November. The purposes of the agreement are to strengthen the ties between the two organisations, support the teaching staff, facilitate student support and improve joint communication actions. Shipowners played an active role in the supervisory committee set up by the ENSM to resolve the problem of the students of the previous Master 2 intake who graduated in December instead of June. Armateurs de France is currently contributing to the work on the reform of the DESMM degree<sup>1</sup> and remains attentive to the follow-up and effective doubling of the school's student headcount, a significant undertaking given by the French President.

### So is the maritime sector's energy transition underway?

**J.-E. S.** It is, but we have not yet arrived at our destination. The momentum must be encouraged. This is all the more true given that environmental regulations are going to become more ambitious. But here again, it is vital that the rules apply to everyone in the same way. There are other projects to be carried out in the name of sovereignty or economic solidarity. The strategic fleet must be understood in a broad sense. The merchant navy in its entirety is strategic: from oil tankers to cable layers, container ships and port tugs. Finally, developing business flows between French players is essential. There is a favourable ground for projects to be carried out, and it is now time to shift up a gear and make them a reality.

<sup>1</sup> *Diplômes d'études supérieures de la Marine marchande / Merchant Navy postgraduate degree*

## A CONSTANTLY EVOLVING REGULATORY ENVIRONMENT

To address international competition issues and the challenges of the energy transition, Armateurs de France speaks up for its members, and participates in the legislative or regulatory developments dealing with the merchant navy. The organisation is also developing its relations with the industry's structures, both domestically and internationally.



*"Armateurs de France took a lot of initiatives in 2022, notably through the setting up of workshops with the French Permanent Representation to the IMO, or its involvement in the work carried out by France on the governance of the high seas. In a proactive approach, our organisation aims to promote the excellence of the French flag and enhance its influence on the world stage."*

**Laurène Niamba,**  
Head of institutional relations and legal affairs at Armateurs de France



In 2022, Armateurs de France played a significant role in institutional affairs by actively contributing to the work undertaken by the French government on legislative or regulatory changes affecting the merchant navy sector. The organisation also made national representations through parliamentary hearings and various other interventions. Armateurs de France furthermore continued to develop its relations with the regional and sectorial structures and associations in the industry such as the *Club de la croisière Marseille-Provence* (Marseille Provence cruise club), the Ocean and Climate Platform – whose bureau Armateurs de France

joined this year – , WISTA, the Propeller Club de Paris, the *Association Française du Droit Maritime* (French Association for Maritime Law), and the *Académie de Marine* (of which our Chairman is vice president). These collaborations have allowed Armateurs de France to join large-scale initiatives aiming to promote the French maritime sector and reinforce both its outreach and its position in a constantly evolving economic and regulatory environment. Following its example of involvement on the domestic scene, Armateurs de France continued to engage with international issues through a better understanding of the profession's global challenges and interests. —

## OUR COMMITMENTS SHAPE THE FUTURE



Louis Dreyfus Armateurs

# THE ECO-ENERGY TRANSITION: A PRIORITY



**Interview with Nelly Grassin,**  
Head of environmental affairs  
at Armateurs de France

Reducing atmospheric pollution in response to public health concerns, lowering ship emissions in the fight against global warming, and preserving biodiversity; French shipowners are active on many fronts!



*"The decarbonisation of the maritime sector will involve meeting immense challenges – technological, energy, regulatory and financial – the most important being that of collaboration. Collaboration between the Government and the private sector, between all the players in the value chain (shipowners, ports, energy providers, shipyards, equipment manufacturers, classification, etc.), and between all stakeholders (major groups, SMEs, start-ups, laboratories, research centres, federations, hubs, the Government, etc.). MEET 2050 aims to promote this collaboration around the Zero Emission Ships and Ports programme and an institute to support all the players in this transition."*

**Erwan Jacquin,**  
MEET 2050 Project leader



The Santoña is the second ship of the Brittany fleet Ferries to be powered by LNG (liquefied natural gas)

## Where do things stand today with ship decarbonisation?

French shipowners have long been engaged in the net zero transition, and have accelerated the reduction of greenhouse gas emissions from their ships since the adoption of the IMO's<sup>1</sup> initial strategy in 2018, which aims to halve them by 2050<sup>2</sup>. International operational and technical measures (CII<sup>3</sup> and EEXI<sup>4</sup>) came into force on 1 January 2023, requiring shipowners to reduce the carbon intensity of their vessels by 40% by 2030<sup>5</sup>. French shipowners are implementing numerous solutions to reduce their CO<sub>2</sub> emissions: wind assistance, batteries, biofuels, reduced speeds, LNG, etc. To achieve net zero, the IMO may revise

its strategy in July 2023. It is already studying other economic and technical measures to encourage shipowners to further reduce their carbon footprint and receive more support for their positive actions.

## Why apply for the Green Marine Europe label?

Green Marine Europe (GME) is a label, sponsored by Surfrider Foundation Europe, that is both ambitious and robust thanks to its collaborative approach. Shipowners work with maritime experts, public authorities and environmental NGOs. GME has received support from the highest level of Government. It now has 15 French shipowners<sup>6</sup> with the label,



*"There is no doubt that synthetic fuels are part of the future of shipping, but we're going to have to capture a lot of renewable energy to produce them! In a world where the global fleet no longer uses fossil fuels, will we be able to produce enough synthetic fuels in the timeframe required by the climate emergency? It is clear that the market will be extremely tight, and I am convinced that wind propulsion will play a larger role than we might suspect. In any case, it will be necessary to carefully compare the ecological benefit of the CO<sub>2</sub> savings achieved by the use of synthetic fuels and those achieved by the wind blowing through the sails of a ship. Fair winds and following seas to everyone for 2023!"*

**Nils Joyeux,**  
CEO of Zéphyr & Borée

# 99.9%

The reduction in fine and ultrafine particle emissions achieved by a particulate filter installed on the La Méridionale ferry Piana

representing 347 ships. Armateurs de France and several of its members have been actively involved in the development and promotion of the label from its inception to the present day. Shipowners rely on GME to accelerate their eco-energy transition thanks to its criteria<sup>7</sup> which go beyond environmental regulations.

## What should we think of the Mediterranean being designated as a SECA<sup>8</sup>?

The members of Armateurs de France have always been very much in favour of this health and environmental protection regulation. The entry into force of the Global Sulphur Cap in 2020 had already required ships worldwide<sup>9</sup> to reduce the sulphur content of their fuels by a factor of seven to 0.5%<sup>10</sup>. We welcome the designation of the Mediterranean Sea Emission Control Area for Sulphur Oxides and Particulate Matter from 1 May 2025, effectively reducing this limit to 0.1%, as has been the case since 2015 in the English Channel and North Sea<sup>11</sup>.

## Was any progress made for biodiversity in 2022?

French shipowners focus much of their efforts on reducing the CO<sub>2</sub> impact of their ships. Nevertheless, biodiversity is not being neglected! Shipowners are increasingly committed to its preservation, firstly through a better understanding of the impacts of shipping. I could mention, for example, their participation in the QWIO<sup>12</sup> project – which aims to assess and reduce the underwater noise emitted by maritime traffic in the Indian Ocean – launched after the signing of the contract with the FGEF<sup>13</sup> at the One Ocean Summit. Also worth noting is the adoption of voluntary measures, for example in the north-western Mediterranean, which could be designated as a Particularly Sensitive Sea Area by the IMO, to avoid the risk of collision with cetaceans. By reducing speed and using cetacean detection and tracking equipment, shipowners are equipping themselves and changing their operating methods to preserve biodiversity. —



LNG Endeavour, Gazocéan

1 International Maritime Organization  
2 Compared with 2008  
3 Carbon Intensity Indicator  
4 Efficiency Existing Ship Index  
5 Compared with 2008

6 Brittany Ferries, CMA CGM, Compagnie Maritime Nantaise, Corsica Linea, CPTM (Aranui Cruises), Genavir – Ifremer, La Méridionale, Maritima, MSC Cruises Management, Orange Marine, Penn Ar Bed, Ponant, Socatra, Sogestran Shipping, Stena Line

7 Pollutant and GHG emissions, underwater noise, invasive species, waste management and oil discharge, ship recycling.  
8 Sulphur Emission Control Area  
9 Except in SECA zones

10 Or to use an exhaust gas cleaning system (scrubber)  
11 But also in the Baltic Sea, part of North American area and the United States Caribbean area

12 Quieter Western Indian Ocean  
13 French Global Environment Fund

# DIALOGUE, PROMOTION AND TRAINING



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

Orange Marine



*"2022 was marked by an unprecedented event: the organisation at OPCO Mobilités of the Colloque Compétences Mer (Sea Skills Colloquium) during the Semaine de l'Emploi Maritime (Maritime Employment Week). Dedicated to the attractiveness of maritime professions, it was a forum for discussions and led to the validation of an action plan with key stakeholders. The Week also facilitated the production of a collection of factsheets on seafaring and land-based maritime jobs, as well as the creation of videos, the organisation of exhibitions and forums, and the setting up of a job board, an occupations website, and an observatory website."*

**Isabelle Maimbourg,**  
General Transport, Logistics  
and Services at OPCO Mobilités

## 165

The number of accepted applicants to the merchant navy first class officer degree course in 2022  
(source: ENSM)

In 2022, Armateurs de France retained its leading role in the area of social dialogue. Minimum wage agreements, merging of branches and social promotion are all projects that were launched, completed or are under negotiation. The organisation has also invested heavily in education, in particular alongside the ENSM<sup>1</sup> and the EMTC<sup>2</sup>.

**2022 was a year that saw protracted collective bargaining negotiations over officers' minimum pay.**

**What was the outcome?**

Negotiations on the minimum pay scale for officers began at the end of 2021, with a very strong desire on the part of the shipowners to agree on a rider. The last collective agreement dated back almost ten years, and it had become urgent to change the pay scale in the interests of the companies and their employees. After many months of negotiation, we reached an agreement with the employee trade unions on 30 November 2022, raising the minimum pay scale by 10%. The organisation welcomes the high-quality dialogue with the trade union representatives on

this subject and hopes that the momentum gained will be confirmed in the months to come.

**What is the state of play with the planned merger of the officers and ratings branches?**

Discussions on merging the branches began more than two years ago, and were slowed down by the health crisis. Nevertheless, the Directorate-General for Employment resumed contact with the social partners in June 2021, informing them of its desire to pursue the merger between the branches of shipping, waterway and towage crews. The Employment Administration granted a period up to the end of 2022 to allow the social partners to proceed with a concerted merger of their branches. The interested parties

then undertook to meet again, but the discussions quickly crystallised around the reinstatement of the navigating colleges (*collèges navigants*) – a real obstruction to their representativeness, according to the unions. Armateurs de France and the employers' organisations concerned decided to lend their support to the union representatives by sending a joint letter to the Minister of Employment and the Minister of State for Marine Affairs, attached to the Prime Minister, requesting the reinstatement of these colleges subject to the application of workforce thresholds. This is indeed an essential prerequisite for work to resume on the merger. Today, we are waiting for a response.

**Has the dialogue engaged on social promotion as part of the Fontenoy du Maritime process produced results?**

Work on social promotion had been initiated as part of the Fontenoy du Maritime process, and had led to Armateurs de France and the employees' trade unions developing lines of thought. These ideas had been discussed with the Administration, but ultimately were not followed up. The social partners quite rightly wished to revive discussions on social promotion, jointly with the French secretariat of state for the sea and the DGAMPA<sup>3</sup>. A first series of meetings was therefore organised at the end of 2022. The concerns identified at this stage include the financing of five-yearly refreshers, the system for validating experience and retraining in the event of a change of college. Armateurs de France and the union representatives are working together to ensure that action can be taken quickly in this area. We

are certain, as are they, that this essential issue must produce results in 2023, and we are fully committed to this perspective, particularly given the serious labour shortages that we are currently experiencing.

**In response to increasingly prevalent cross-Channel social dumping, what has Armateurs de France done?**

On 26 October, the serious difficulties experienced by French cross-Channel companies, particularly following the P&O affair, were discussed in the presence of the Minister of State for Marine Affairs, attached to the Prime Minister, who was asked to signal his firm support. Following this meeting, the Administration launched an inquiry on social dumping, in which Armateurs de France was an eager participant. In addition, Jean-Marc Roué, Chairman of the Supervisory Board of Brittany Ferries, was recently appointed by the Chairman of the Conseil Supérieur de la Marine Marchande (CSMM – High Council for the Merchant Navy) to head a working group dedicated to social dumping in the Channel. Our organisation is naturally following development closely, in addition to the parliamentary bills recently tabled by three MPs from different parties. We remain attentive and alert to the issue of social dumping, both in the Cross-Channel and in the Mediterranean. This fight is a priority! —

**A real breakthrough in Wallis-and-Futuna**

*At the behest of Armateurs de France, and following several years of intense work with the public authorities, an agreement between ENIM<sup>4</sup> and the Wallis and Futuna Islands overseas territory was finally signed in September 2022. It now makes it possible for seafarers living in France and working on French-flagged ships registered in this overseas territory to join the social protection scheme managed by the ENIM. A significant achievement for Armateurs de France.*



*"The Social Affairs Committee and the CPPNI<sup>5</sup> are the cornerstone of our trade organisation. For several years, the shipowners have entrusted me with the chairmanship of these bodies, and I am, of course, very honoured. Social dialogue is an essential issue for our organisation, and we try to ensure that it is of high quality. In this respect, we are pleased to have reached an agreement on minimum pay for officers in 2022. Looking to 2023, the upgrading of minimum wage scales for all branches remains a priority objective for us, but it is not the only one. Social promotion, the merger of branches and vocational training are all subjects that will be the focus of future negotiations."*

**Eric Derrien,**  
CEO of Genavir

<sup>1</sup> École Nationale Supérieure Maritime / French Maritime Academy

<sup>2</sup> European Maritime Training Center

<sup>3</sup> Direction générale des Affaires maritimes, de la Pêche et de l'Aquaculture / Directorate General for Maritime Affairs, Fisheries and Aquaculture

<sup>4</sup> Établissement National des Invalides de la Marine / Seafarers' Health Service

<sup>5</sup> Commissions Paritaires Permanentes de Négociation et d'Interprétation / Permanent Collective Bargaining and Interpretation Committees

# SECURITY AND SAFETY: REINFORCING OUR SYNERGIES



**Interview with  
Pierre-Antoine Rochas,**  
Head of security, safety  
and port affairs at  
Armateurs de France

The MN Calao, a ro-ro container ship by The Compagnie Maritime Nantaise, converted for the requirements of the French Defence forces.



*"Preventing acts of terrorism and preserving the nation's interests are major challenges for France, on the eve of the Rugby World Cup and the Olympic Games. With this in mind, the Agence nationale des données de voyage (ANDV – National Travel Data Agency) is developing a system for collecting and processing data on travellers entering or leaving the country by sea. It will be deployed to all control and intelligence services responsible for safety on French soil.*

*This ambitious project benefits from the strong involvement of shipowners, whose active collaboration will be a key element of its success."*

**Prefect Seymour Morsy,**  
Director of ANDV

## 288

Maritime security incidents in 2022 (including 247 thefts and 23 attacks) representing a 5% drop compared with 2021  
(source: Bilan MICA Center 2022)



Armateurs de France is fully committed to proving the safety and security of maritime activities. The organisation works proactively with its partners in France and abroad, in particular with the French Navy and the French administration, to develop innovative solutions and interactions and the sharing of best practice.

**Is the overall drop in the number of incidents in 2022 a good reason for shipowners to reduce their vigilance and relax security measures on board their ships?**

Protecting seafarers remains the top priority for shipowners. Despite this decrease in the number of incidents, and in particular the number of acts of piracy, it is important to maintain a high level of vigilance and rigorous security protocols, particularly in the Gulf of Guinea, the Red Sea and the Arabian Gulf. In addition, these measures must be reinforced in certain areas where shipowners face a deteriorating strategic environment, such

as in the Black Sea with an upsurge in threats linked to the conflict in Ukraine, particularly mines. In our pursuit of the security and freedom of commercial navigation, Armateurs de France supports its members in synergy with its industry partners, such as ICS<sup>1</sup> and ECSA<sup>2</sup>, the French Navy and the public authorities.

**What specific actions has Armateurs de France conducted over the past year to reinforce shipping security?**

To improve mutual knowledge between the merchant navy and the French navy, a workshop organised

in the first half of 2022 at the Armateurs de France headquarters provided an opportunity to share feedback on the consequences of the conflict in Ukraine for the shipping sector, in particular on risks to shipping in the Black Sea. The organisation also supported the active participation of many shipowners in various exercises organised by the French Navy, such as the PIRATEX exercise in the Gulf of Guinea and the CONAVEX 22 exercise conducted by the MICA Center<sup>3</sup>. The latter enabled the two navies to perfect their synergies together in a mock scenario based on real threats faced by shipowners: piracy, cybercrime and hybrid threats. The traditional meeting between the French Navy and shipowners, hosted this year by the Toulon naval base in the second half of the year, enabled us to broaden the scope of our discussions on naval cooperation and cybersecurity issues. It is also by strengthening our synergies with the ANDV<sup>4</sup>, through workshops and regular consultations with shipowners, that we are supporting the development in France of a system for the acquisition and processing of shipping data (see the

ANDV testimonial opposite). Beyond key collaborations, market intelligence, analysis and meetings of the Armateurs de France security and safety committee are all vectors that are of value to the organisation's members, to strengthen maritime security.

**What can be said about cybersecurity, which remains a key issue in the shipping sector?**

The increased digitalisation of the shipping sector over the last few years and the increase in the number of ransomware attacks have made it necessary to continue our efforts to reinforce the cybersecurity of shipowners, particularly in terms of awareness and training. In 2022, Armateurs de France continued to support its members in this area by welcoming the France Cyber Maritime association as an associate member, with the aim of strengthening synergies with this federating player in the cybermaritime ecosystem, and by representing shipowners within C2M2<sup>5</sup>. In order to increase knowledge of the threats of GNSS<sup>6</sup> and AIS<sup>7</sup> interference, which ships are increasingly

encountering, and the sharing of best practices to protect against them, Armateurs de France also organised a webinar with ANFR<sup>8</sup>. Finally, to anticipate the emergence of new requirements in terms of cybersecurity at European level, with the adoption of the NIS 2 directive, the organisation also worked with ANSSI<sup>9</sup> to offer shipowners decryptions and exchange sequences on this new reference framework.

**Are there other risks and legal changes that must be anticipated?**

Whether it is a question of promoting the safety of emerging activities such as the development of offshore wind power or anticipating the emergence of risks linked to the growing use of electric batteries, for example, Armateurs de France is proactively involved in bringing the voice of shipowners to bear in the context of regulatory work and exchanges with the various stakeholders in the maritime industry. The organisation represents the sector in several national consultation bodies, such as the *Commission Centrale de Sécurité* (Central Security Commission). —

*"CONAVEX 2022 was an opportunity to further reinforce the ties between the French Navy and the shipping industry. Orange Marine provided the cable layer Pierre de Fermat to the MICA Center, a reference for naval cooperation, for a dual exchange that benefited everyone. On the Navy side, the exercise allowed the reserve officers to practice briefing a Merchant Navy crew. For my part, as CSO of Orange Marine, I was able to better understand the notion of naval cooperation when faced with a threat, and to discover how it is handled by the Atlantic Maritime Area Staff (CECLANT), the MICA Center and the seafarers."*



**Hugo Plantet,**  
QSE Director, DPA and CSO at Orange Marine

1 International Chamber of Shipping  
2 European Community of Shipowners' Associations  
3 Maritime Information Cooperation & Awareness Center

4 Agence nationale des données de voyage / National travel data agency  
5 Conseil Cyber du Monde Maritime / French Cyber Council for the Shipping World

6 Global navigation satellite systems  
7 Automatic Identification System  
8 Agence nationale des fréquences / National Frequency Agency

9 Agence Nationale de la Sécurité des Systèmes d'Information / National Cybersecurity Agency of France

# WHAT COMPETITIVITY FOR SHIPPING IN TIMES OF CRISIS?



**Interview with Mathilde Prete Capasso Torre,**  
Head of European affairs  
at Armateurs de France

Armateurs de France closely monitors legislative work on the implementation of greenhouse gas emissions trading system (ETS) and defends historical European positions in terms of the sector's competitiveness.



*"In this year of the French Presidency of the Council of the European Union, Armateurs de France was instrumental in promoting ECSA's positions at the many international maritime events planned by the organisers. Armateurs de France also coordinated external communication actions and promoted the presence of ECSA – and other European maritime transport and services organisations – at these high-level events, notably as speakers. These forums led to a strategic rapprochement with the French Presidency."*

**Sotiris Raptis,**  
Secretary General of ECSA

## What can we take away from 2022?

In 2022, the European institutions set about finalising the revision of the main text of the 'Fit for 55' legislative package: the EU Emissions Trading Scheme (ETS) Directive. The main novelty of the text lies in the extension of its scope to other sectors of activity not previously covered by the directive, including shipping.

In December 2022, an inter-institutional agreement was reached. For shipping vessels with a gross tonnage of more than 5,000 USM<sup>1</sup>, a proportion of the emissions will have to be accounted for from 2024 for payment due in 2025.

In addition, the allocation of at least 20 million ETS allowances for shipping until 2030, under the ETS Innovation Fund, is a real breakthrough for the sector, which is the only one to benefit from a dedicated revenue allocation. At current prices, 20 million allowances equate to approximately €1.5 billion.

## How is Armateurs de France dealing with this change of paradigm?

Following the publication of the parliamentary report by German MEP Peter Liese (EPP), aimed in particular at transferring 75% of the revenue generated by the ETS directly to the players in the maritime ecosystem, Armateurs de France published a position paper with the French Maritime Cluster and France Hydrogène, in support of the European Parliament's Ocean Fund project. Furthermore, Armateurs de France recalls that any regional financial mechanism will have to be evolutive, coherent and compatible with the future market mechanism set up at the IMO. The organisation is also careful to report any competitive distortions which may result from European shipowners being subjected to competition under the implementation of a financial contract.

## How were these positions defended?

Several actions were carried out directly within the framework of our organisation or through ECSA<sup>2</sup>, our European representative. Armateurs de France actively participated in the campaign to promote a fund dedicated to the sector, from the revenues of the maritime ETS.

In addition, Armateurs de France contributed extensively to the work coordinated by ECSA, in response to the European Commission's request to launch a debate with the industry in parallel with the three-way discussions on the revision of the ETS Directive. One of the main objectives was to discuss the practical conditions for reallocating the revenue generated.

## What is the background to the revision of the General Block Exemption Regulation (GBER)?

Consortia are the basis for operational cooperation between scheduled shipping lines. The block exemption that these companies have enjoyed since 1995 has contributed to the development and quality of scheduled container shipping services.

The CMA CGM Marco Polo is equipped with a new wind deflector installed on its prow. This new equipment improves the ship's aerodynamics and is intended to reduce fuel consumption by 2%.

# 20M

ETS allowances  
for shipping, equating  
to approximately  
1.5 billion euros

In August 2022, the European Commission launched the consultation process to repeal the existing rules. This regulation had been adopted in 2009 and re-evaluated in 2014 and 2020.

The supply chain disruption caused by the COVID-19 crisis has raised questions as to whether the exemption should be extended.

## Why does Armateurs de France advocate its extension in the same form?

If consortia were to be dismantled, this would have negative consequences for the entire supply chain, which would be even more damaging in times of health crises! Furthermore, consortia pool container journeys and thus reduce the environmental impact of freight transport. Finally, at a time when inflation has been exacerbated by the war in Ukraine, consortia curb the increase in goods transportation prices directly borne by the consumer.

At this stage of the legislative process, through ECSA, Armateurs de France has expressed its support for the extension of the exemption. —



*"In April 2022, Club Med became a member of the Armateurs de France family! Alongside Ponant, a long-standing member of Armateurs de France, other companies have followed and I am pleased to meet up regularly with the various experts in the sector. One of the main issues for cruise operators is obviously the recovery of our business, which has been seriously weakened by the repeated crises of recent years. This is why I have high expectations with regard to strengthening the links between Armateurs de France, ECSA and CLIA – the cruise lines international association – to promote the visibility of our industries and make our voice heard."*

**Sandrine Rossi,**  
VP Club Med Exclusive Collection,  
Club Med



<sup>1</sup> Universal Measurement System  
<sup>2</sup> European Community Shipowners' Associations

# BUILDING ON THE FONTENOY MOMENTUM



**Interview with Cécile Rafat,**  
Head of economic,  
tax and statistical affairs  
at Armateurs de France

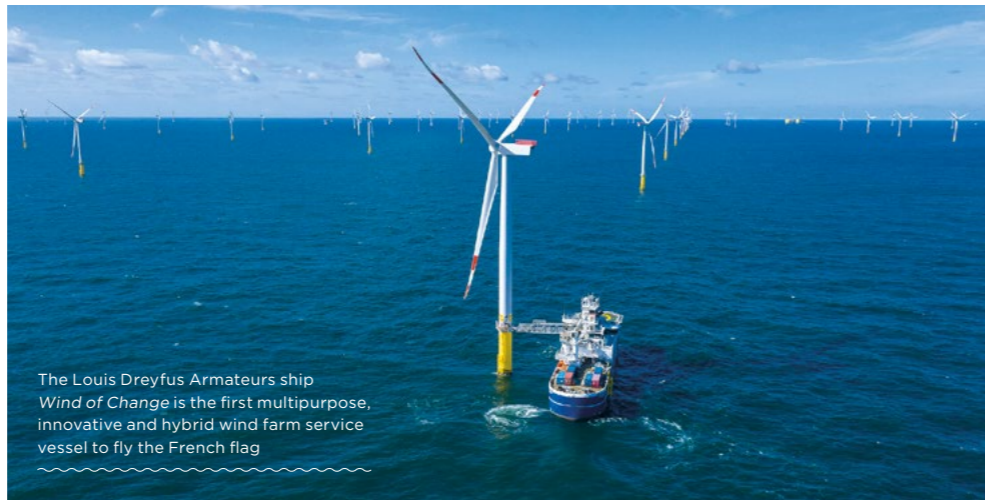


*"For TOWT, 2022 was a year of accomplishment, marked by the successful financing of its first fleet. The borrowing was innovative and diversified, thanks to the support of the Government, leading banks, private shareholders and the general public, not to mention the contribution of energy saving certificates. TOWT was the first beneficiary of the Internal Guarantee issued by Bpifrance Assurance Export, and the first French shipowner to benefit from green bonus depreciation. TOWT also enrolled its historical shareholders, some twenty new partners and around 2,000 personal investors in a record crowd funding operation."*

**Diana Mesa,**  
CEO and co-founder of TOWT  
– TransOceanic Wind Transport

## +58%

The annual increase in European supplies of LNG, equating to a total volume of 100 million tonnes



The Louis Dreyfus Armateurs ship Wind of Change is the first multipurpose, innovative and hybrid wind farm service vessel to fly the French flag

2022 was marked by the conflict in Ukraine, inflation and logistical strains arising from post-Covid recovery. Shipowners maintain their undertakings towards the energy transition and the development of new activities such as services to MRE<sup>1</sup>. The issues of finance and competitiveness are more crucial than ever.

### What actions have been conducted in the areas of tax and finance?

Throughout the year, Armateurs de France worked on sustaining the momentum created by the Fontenoy Maritime conference. We actively followed the work of the two missions launched in October 2021 by the Government, one dedicated to financing tools for French ships, and the other to the evaluation of the flat-rate tonnage tax regime. We submitted several proposals and contributions to the rapporteurs: an estimate of the cost of

replacing the fleet under the French flag (estimated at between 14 and 18 billion euros over ten years); the extension of the tonnage tax to service vessels; and a green investment subsidy scheme tailored to retrofit operations on vessels and to traditional financing. Armateurs de France also contributed, in consultation with various banks and the Ministry of Finance's Tax Legislation Directorate (DLF in French), to the evolution of the doctrine on the Green asset overdepreciation project, based on the

changes made by the 2022 Finance Act. The inclusion of service vessels is still pending at this time. Similarly, we made an unsuccessful request to build into the 2023 Finance Bill the renewal of the scheme until 2026 and its extension to new ships for the installation of low-carbon auxiliaries and ship-to-shore power. We will keep up these efforts throughout 2023. Lastly, Armateurs de France is working continuously with its contacts in the banks, the Directorates General of the Treasury and Maritime Affairs, Fisheries and Aquaculture, and Bpifrance, with a view to encouraging the issuance of guarantees to the sector.

### What progress has there been on the development of marine renewable energy (MRE)?

The past year was full of initiatives for the development and structuring of a French MRE maritime services sector, starting with the report submitted at the beginning of the year by Frédéric Moncany de Saint-Aignan, Chairman of the French Maritime Cluster. Commissioned by Annick Girardin, then Minister of Marine Affairs, this report calls for greater economic solidarity between players throughout the value chain, and an increase in the local content of projects by promoting the participation of local companies. Armateurs de France, France Énergie Éolienne and the *Syndicat des Énergies Renouvelables* worked during the year on a tripartite commitment charter, which was signed during the *Assises de l'économie de la mer*, in the presence of the Minister of State for Marine Affairs, attached to the Prime Minister, Hervé Berville. In 2023, Armateurs de France will map out the

present and future skills and resources of its members for MRE maritime services. A rapprochement with *Réseau de Transport d'Électricité* (RTE), responsible for connecting offshore wind farms to the power grid, was also initiated at the end of 2022. Finally, Armateurs de France promotes the defence of energy sovereignty and the competitiveness of the sector as part of the bill on accelerating renewable energy. Introduced by the Government in September 2022, the parliamentary bill passed into law on 10 March 2023.

### What work did the data unit oversee in 2022?

Launched in 2020 by Jean-Emmanuel Sauvée, Chairman of Armateurs de France, this unit aims to better profile the sector using figures. The aim is to help our interlocutors to better understand the issues and needs by "maritimising" them. Three papers were produced in 2022: world outlook on the merchant fleet and construction capacities; investments required for the renewal and growth of the French flagged fleet; and ship financing through maritime leasing with "green" tax relief. At the same time, we went further with the studies of the working group dedicated to the competitiveness of the French flag, initiated at the end of 2021, and drew up an inventory of the social and capital costs incurred, in comparison with other national flags. Finally, in 2022, Armateurs de France commissioned a study from the *Institut Supérieur d'Économie Maritime* (ISEMAR – Higher Institute of Maritime Economics). —

**Written by Martin Carceles,**  
economic and tax affairs officer.



*"Following the inauguration of the Saint-Nazaire wind farm at the end of 2022, the outlook is now bright for the development of offshore wind power in France, which is set to become one of the pillars of the electricity mix by 2050 (25 to 30% of electricity produced) with, at the very least, 40 GW of installed capacity. The Offshore Wind Deal, signed on 14 March 2022, commits the Government and the sector to a win-win situation: electricity production on domestic ground from the development to the operation of the farms. French shipowners are therefore an important member of this trio to meet the need for expert and competitive companies for maritime services essential to offshore wind power. Such is the purpose of the tripartite charter signed in November 2022 with Armateurs de France."*

**Matthieu Monnier,**  
Deputy CEO, Offshore,  
communities and expertise  
(EU and RG) at France Énergie  
Éolienne (FEE)

<sup>1</sup> Marine Renewable Energy (MRE)

# 416 SHIPS UNDER THE FRENCH FLAG

## Transport fleet: 187 ships

SHIP TYPE	Quantity	GT <sup>1</sup>	DWT <sup>2</sup>
CARGO	14	28,664	19,686
CEMENT CARRIER	2	4,924	6,050
PASSENGER SHIP	17	9,670	2,693
SCIENTIFIC RESEARCH AND EXPLORATION VESSEL	1	9,403	4,871
CRUISE SHIP	16	172,358	23,605
OIL TANKER	28	1,723,498	3,244,906
CONTAINER SHIP	31	3,797,302	3,748,588
RORO SHIP	19	145,328	64,544
FERRY	47	831,053	157,650
LNG TANKER	12	993,096	788,204

7.5 years

Average age of the French shipping fleet

## Service fleet: 229 ships

SHIP TYPE	Quantity	GT <sup>1</sup>
BUOY TENDER	9	3,193
CABLE LAYER	12	115,903
DREDGER	14	35,517
OFFSHORE SERVICE VESSEL	48	124,616
TRAINING SHIP	2	1,081
PILOT BOAT	1	499
RESEARCH VESSEL	7	12,822
TUG BOAT	118	59,816
SAND DREDGER	5	10,596
MARITIME WORKS SUPPORT VESSEL	13	3,264

18.4 years

Average age of worldwide fleet

Source: Merchant Fleet Mission - January 2022

1 Gross tonnage above 100 UMS (Universal Measurement System)

2 Deadweight tonnage


## THE MEMBERS OF ARMATEURS DE FRANCE

ABCRM • ALCATEL SUBMARINE NETWORKS • ALKA MARINE SOLUTIONS • ARMATEURS CALÉDONIENS • BARRY ROGLIANO SALLES • BESSÉ • BOLUDA FRANCE • BOURBON OFFSHORE SURF • BRITTANY FERRIES • BUREAU VERITAS • CARIBBEAN LINE • CATLANTE CATAMARANS • CCI BAYONNE • CÈDRE • CLUB DE LA CROISIÈRE MARSEILLE PROVENCE • CLUB MED MARINE • CMA CGM • COMITÉ MARSEILLAIS DES ARMATEURS DE FRANCE • COMPAGNIE ARMORICAINE DE NAVIGATION • COMPAGNIE MARITIME NANTAISE • COMPAGNIE POLYNÉSIEENNE DE TRANSPORT MARITIME • CONSEIL DÉPARTEMENTAL DE CHARENTE-MARITIME • CONSEIL RÉGIONAL DE BRETAGNE • CORSICA FERRIES • COSTA CROISIÈRES FRANCE • DFDS SEAWAYS • DRAGAGES, TRANSPORTS ET TRAVAUX MARITIMES • EXPÉDITION 7<sup>e</sup> CONTINENT • EYSSAUTIER • FÉDÉRATION FRANÇAISE DES PILOTES MARITIMES • FILHET-ALLARD • FIMAR • FRANCE CYBER MARITIME • FRANCE LNG SHIPPING • GASPE • GAZOCEAN • GENAVIR • GEOGAS MARITIME • GREENSHIP GAS • GROUPE LHD • HELVETIA ASSURANCES • HFW • INGEPAR • IXBLUE • JIFMAR OFFSHORE SERVICES • KARIBS LINK • KNUTSEN LNG FRANCE • LA MÉRIDIONALE • LES ABEILLES • L'EXPRESS DES ÎLES • LOUIS DREYFUS ARMATEURS • MARFRET • MARITIMA-SOGESTRAN • MEDLINK PORTS • MERCERON TP • MSC CROISIÈRES FRANCE • NEOLINE • OPSEALOG • 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 PARTNERS • SEAOWL FRANCE • SEAOWL MARINE • SOCATRA • SOCIÉTÉ DE TRANSPORTS FLUVIO-MARITIMES DE L'OUEST • SUDILES • SYNDICAT PROFESSIONNEL DU LAMANAGE DES PORTS DE LA MANCHE, DE LA MER DU NORD ET DE L'ATLANTIQUE • THOMAS SERVICES MARITIMES • TOTALENERGIES • TOWT - TRANSOCEANIC WIND TRANSPORT • V.SHIPS FRANCE • WATSON FARLEY & WILLIAMS • ZÉPHYR & BORÉE



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