

ANNUAL REPORT  
2019/2020

# FLYING THE BLUE FLAG



ANNUAL REPORT  
2019/2020

FLYING  
THE  
BLUE  
FLAG

Many thanks to the member companies, the French Navy and the Armateurs de France crew for their valuable contributions.

Publishing editor:  
Armateurs de France  
Design & layout: agencebside.fr  
Written by Armateurs de France, agencebside.fr  
Translation: cordial-accord.fr  
Photo credits:  
Alizés  
Armateurs de France  
Arnaud Bouissou - Terra  
Assemblée nationale - 2020  
Augustin Vandenhove -  
Louis Dreyfus Armateurs  
Boireau  
Bourbon  
Brittany Ferries  
Brittany Ferries - M. Mochet  
B. Deroche  
CMA CGM  
Dock90  
Franck Dunouau  
Getty images - Jason Edwards  
IFAW - Vanessa Mignon  
Ilago  
La Méridionale  
Louis Dreyfus Armateurs  
Marfret  
Marine Nationale  
Maxime Pontoire  
OMI  
Orange Marine  
Philippe Bauduin  
Philippe Plisson  
Ponant - Nicolas Matheus  
Ponant - Olivier Anrigo  
Ponant - Philip Plisson  
Soazig de la Moissonnière -  
Présidence de la République  
S. Lesbats  
Thierry Sommer  
TOWT.eu - H&T architecture navale  
Worldrise

CONTENTS

4

DRAWING  
THE BLUE  
LINE



6

Joint interview

Jean-Marc Roué, President of Armateurs de France, and Jean-Marc Lacave, Managing Director of Armateurs de France, take a step back and discuss the current and future challenges of shipping.

10

A look back on 2019

A reminder of the year's highlights in pictures.

16

WORKING FOR  
A BRIGHT  
BLUE FUTURE



18

Environment:  
from necessity to priority

24

Consolidating the competitiveness  
of shipping

28

Social dialogue:  
all hands on deck at Armateurs de France!

32

Safety and security:  
total determination

36

ROLLING OUT  
THE BLUE  
CARPET



38

Armateurs de France at a glance

40

Meet the crew

42

The merchant shipping fleet flying  
the French flag

43

The members of Armateurs de France

CONTENTS

# DRAWING THE BLUE LINE

DRAWING THE BLUE LINE

In a world in which maritime transport accounts for 90% of worldwide cargo transportation, Armateurs de France has all hands on deck to promote an increasingly responsible and aware shipping industry. Here are a few examples.

*Saint-Pierre,*  
Société de Transports  
Fluvio-Maritimes de l'Ouest

# FRENCH SHIPOWNERS, DRIVING THE TRANSFORMATION OF THEIR INDUSTRY

With determination, conviction and creativity, French shipowners are committed to building a responsible industry capable of rising to its economic, environmental and social challenges now and in the future. In a supporting role, Armateurs de France works to defend the competitiveness of the nation's shipping. **Jean-Marc Roué and Jean-Marc Lacave, respectively President and Managing Director of Armateurs de France, offer their thoughts on the state of play and the challenges that lie ahead.**



Jean-Marc Lacave  
and Jean-Marc Roué

## How is the French flag doing?

**JEAN-MARC ROUÉ** The merchant fleet operating under the French flag has the wind in its sails and the short sea segment is particularly buoyant. Furthermore, this year we have seen several flag transfers by vessels previously operating under the British flag, such as at CMA CGM for instance. In all, more than 20 vessels have joined the ranks of the French fleet. The French flag is renowned all over the world for its excellence, notably in terms of safety and security, but also for its environmental merits.

**JEAN-MARC LACAVE** We can add that French know-how owes much to the quality of basic education and training for seafarers.

## Are you referring to the ENSM?

**J.-M. L.** The ENSM<sup>1</sup> (French Maritime Academy) is indeed a high level institution. It prepares future officers for the challenges of modern shipping: new technology, cyber security, sustainable development, etc. Armateurs de France maintains very close relations with the ENSM to promote the recruitment of future seafarers by its members. Because this profession is always in demand: officers find a permanent employment contract inside two months! Jobs in the merchant navy remain attractive, we are seeing an increasing number of French sailors taking training and joining ships' crews. This is a positive and encouraging sign.

## How is 2020 looking in terms of business?

**J.-M. R.** Worldwide economic forecasts are not very upbeat for 2020. As it is a global industry, shipping will simply go with the flow. And the coronavirus outbreak is not likely to improve the outlook. While the economic impact is currently hard to assess with accuracy, it is nevertheless evident that shipping has already been affected. This is a subject of major concern, particularly if the situation were to continue for a long time. We also met with other headwinds at the beginning of the year. I could mention the Chinese New Year which has had a downward influence. On certain operational aspects, the entry into force of the Global Sulphur Cap 2020 has brought economic distortion to the competitiveness of shipping.

## So let's talk about the Global Sulphur Cap 2020. What are the consequences for shipowners?

**J.-M. R.** Let us first remind ourselves that this regulation, adopted by the International Maritime Organisation (IMO) in 2016 and which came into force on 1 January 2020, is a major, and even historic, step in the fight against pollution. It imposes a drastic reduction on the sulphur oxide emissions of vessels all over the world: the limit for sulphur content in marine fuels is divided by seven. Whilst welcoming this ambitious measure, Armateurs de France had, at the time, voiced its concern about the obstacles that needed to be overcome for shipping firms to be able to fully comply with the requirements of the Global Sulphur Cap. And while they anticipated difficulties ahead, shipowners continued to show a willingness to rise to the challenge and be ready on day one. Unfortunately, three months into its application, the fears we raised have proven to be justified.

## Specifically?

**J.-M. R.** Problems have arisen in terms of the availability, quality and cost of compliant fuel. Indeed, despite the entry into force of the regulation, very-low sulphur fuel oil is still hard to get. And it costs twice as much as the usual heavy fuel oil with, as a result, a substantial financial impact on shipowners. As for the alternative consisting of mixing fuels, this has a potential downside due to different densities and the risk of separation inside the storage tanks. And, over and above the difficulty in complying with regulations, mixes could affect the smooth operation of engines.

**J.-M. L.** This regulation has an impact on the strategies of firms which, depending on their market segment, cannot pass on these additional costs to their customers. The competitiveness of shipping is at risk - and yet the goal of the regulation was to promote this means of transport which is the most efficient per tonne transported.

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



#### What are shipowners doing to reduce their carbon footprint?

**J.-M. R.** To achieve decarbonisation, shipowners are displaying a proactive and creative approach. They invent and deploy an array of innovative solutions such as liquefied natural gas (LNG), wind-assisted propulsion or ship-to-shore power connections which can be used by part of the merchant navy. In 2018 and 2019, I strongly campaigned for a reduction in the speed of dry and liquid cargo ships which make up nearly two thirds of the global fleet. Reducing speed has a direct and substantial effect on fuel consumption: a bulk carrier which for example reduces its speed from 12 to 11 knots can reduce its consumption by 18%, and even by 30% if it travels at 10 knots. This measure, which can rapidly yield results, was taken up by the Government, and France brought it before the IMO.

**J.-M. L.** Environmental issues are at the heart of our concerns, but it is essential that all stakeholders are in sync. In this respect, Armateurs de France is lobbying for port infrastructure to be converted: LNG bunkering, ship-to-shore connections, multimodal platforms, etc.

#### "ON THE ROAD TO DECARBONISATION, FRENCH SHIPOWNERS ARE DISPLAYING ACKNOWLEDGED AND REMARKABLE DYNAMISM."

JEAN-MARC ROUÉ

#### How can the energy and ecology transformation be financed?

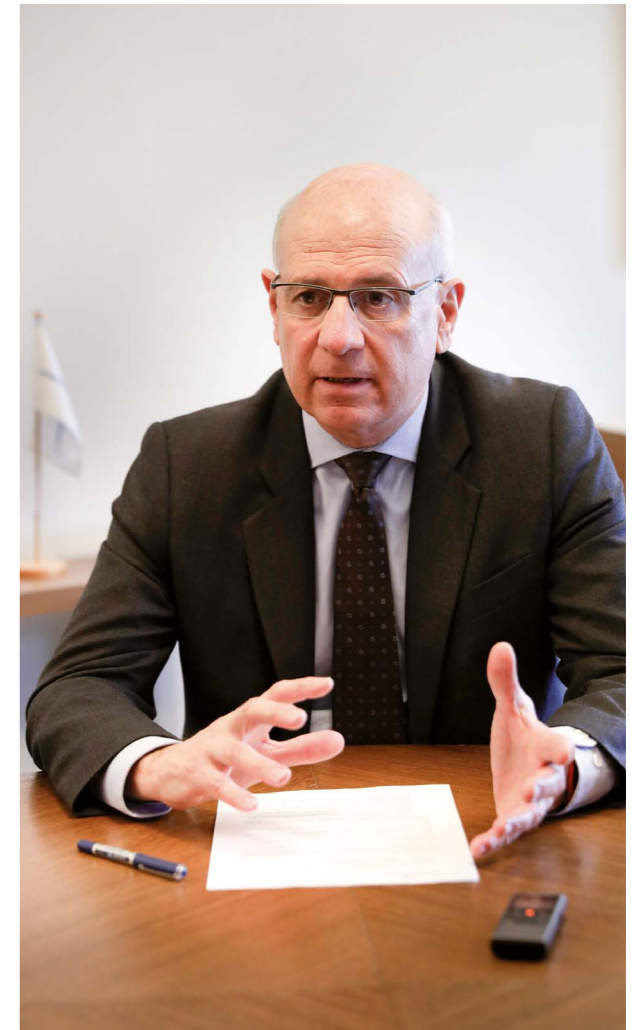
**J.-M. R.** This, naturally, is a question of critical importance to our members. Converting to greener energy methods requires substantial investment. A few investment support tools do exist. I could mention, for example, the additional tax depreciation scheme for vessels operating on alternative energy sources (hydrogen or LNG for example). However, they are not enough to make up for the financial effort made by shipowners.

**J.-M. L.** In parallel, we have observed banks beginning to take prudential measures. The decarbonisation of a fleet can only happen step by step and it is dependent on the technologies available on the market. We still need to be able to explain this and reassure our bankers who, in turn, need to become more flexible to support and secure the conversion of the fleet.

#### Where do you see shipping in 2050?

**J.-M. R.** I am optimistic and confident about the future. Economic cycles will accelerate but, thanks to their disciplined management, their values and their mindsets, our French shipping companies are well equipped to weather the storm. Our profession is not a passive one: it constantly innovates and takes risks and initiatives. It is responsible and constructive; it shows the way forward. Through the intermediary of Armateurs de France, it has the trust and consideration of French officials to whom we 'tell it like it is'. Thanks to our expertise and our proactive attitude, we manage to steer things in the direction and interests of the profession, even on a European and international level. The European Union is legitimately pursuing its ambitions on the decarbonisation of shipping. For example, it is considering extending the European emissions trading system (ETS) to the shipping sector. But legislating on this scale would be an error, because shipping is an activity which by nature is global and therefore exposed to international competition. More globally, constant dialogue with all stakeholders (institutional bodies, politicians, NGOs, manufacturers, energy providers) is the key to success.

**J.-M. L.** It is evident that we cannot meet the challenge of the ecology and energy transition alone. Everyone must play their part at an international level to co-construct the responsible and decarbonised shipping of the future. While a first milestone has been reached with sulphur compound emissions, the road ahead is still long. Not to mention our human capital, course. Our growth must be based on the three pillars of sustainable development: economic, environmental and social. These furthermore are the foundations of our Blue Charter, which we revisited last year and was signed enthusiastically by French shipowners. Armateurs de France remains at the helm to support them in meeting the challenges they face today and in the future.



#### "THE AMBITION OF ARMATEURS DE FRANCE IS TO SUPPORT THE EXCELLENCE AND YOUTH OF THE FRENCH FLEET, THE COMPETITIVITY OF FIRMS AND THE KNOW-HOW OF THE WOMEN AND MEN WHO SERVE THE SHIPPING INDUSTRY."

JEAN-MARC LACAVE

## A LOOK BACK ON 2019



15-17 FEBRUARY

### Salon de l'étudiant

As a partner of the French Maritime Academy ENSM, Armateurs de France invites officers to Paris to answer questions from young people. Aim of the game: generate new shipping vocations!

14-19 FEBRUARY

### Raising awareness of underwater noise pollution

As part of a social media campaign, Armateurs de France is interviewed by the International Fund for Animal Welfare (IFAW) to set out the sector's vision on this issue. Two weeks previously, the organisation took part in a technical workshop on the same subject at the International Maritime Organisation.



9 APRIL

### Shipping Day

Richard Ferrand, the President of the National Assembly, welcomes the shipping community to his official residence, the Hôtel de Lassay, for Armateurs de France's annual gathering. This second edition is devoted to environmental initiatives in the sector in response to public health and climate issues.



10 APRIL

### Blue Charter Trophy

On the occasion of its annual dinner held at Pavillon Gabriel in Paris, Armateurs de France awards the 2019 Blue Charter Trophy to La Méditerranée. The award acknowledges two pioneering experiments: its liquefied natural gas-fuelled ship-to-shore power connection and its particulate filter (see page 23).

### 13-17 MAY IMO Marine Environment Protection Committee

One year after the adoption of the strategy to reduce greenhouse gas emissions from ships, its mode of implementation is on the agenda. Armateurs de France is a member of the French delegation attending this 74<sup>th</sup> session.



23 MAY

### Assets, developments and prospects for the French flag

Nearly 15 years after its creation, the time has come to take stock of the progress made possible by the French Flag Register. Armateurs de France and the law firm GIDE organise a colloquium dedicated to the subject in Paris.

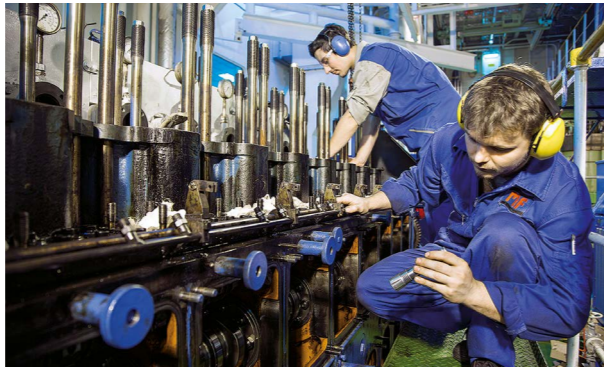
29 JUNE – 10 JULY  
The sea, size XXL

Armateurs de France jumps aboard the first edition of *La Mer XXL*, an extraordinary sea-themed exhibition organised in Nantes. On the programme: the launch of the app @Port which federates all the stakeholders involved in the port ecosystem, and a live 'pitch' in front of the general public with its partners from the Ocean & Climate Platform.



**3 JULY****Vocational training talk**

Armateurs de France invites OPCO Mobilités to answer shipowners' questions on its new missions and new funding and reimbursement arrangements.

**1-2 OCTOBER****Blue Med Days**

Armateurs de France and several of its members take to the stage at this first symposium launched by the Pôle Mer Méditerranée. They share their visions and projects to meet the challenges of transitions in digital technology and energy in the sector.

**23 JULY****SAILS Charter**

Launch of the SAILS Charter (Sustainable Actions for Innovative and Low-impact Shipping), at the Ministry for the Ecological and Inclusive Transition, in the presence of Minister Élisabeth Borne and Minister of State Brune Poirson.

**5 NOVEMBER****Parliamentary breakfast in Paris**

Armateurs de France invites members of parliament and shipowners to come together to examine solutions and tools for a French fleet at the cutting edge of environmental innovation, with journalists joining the proceedings at the end.

**23-24 AUGUST****Three highlights on the fringe of the G7 summit**

Armateurs de France and the first signatories of the SAILS Charter have an appointment at the Elysée Palace to present their environmental initiatives to the French President. Rodolphe Saadé, Chief Executive Officer of CMA CGM, makes an important announcement: his

fleet will not use the Northern Sea Route. The speed reduction measure, supported by Armateurs de France, is the first environmental measure presented by Emmanuel Macron in his declaration prior to the G7 summit. And in Biarritz, invited by its partner Surfrider

Foundation Europe, Armateurs de France takes part in the 'Ocean Pavilion', a collective mobilisation seeking to make the ocean and its preservation an integral part of international negotiations.

**18-19 NOVEMBER****The future of international ocean governance**

Armateurs de France speaks at the 2<sup>nd</sup> High Seas International Conference in Boulogne-sur-Mer. An opportunity to discuss the role of economic actors in the protection of biodiversity.

**27 NOVEMBER****Navy and shipowner gathering**

Private sector firms and military officials consolidate their collaboration in shipping safety and security at the Maritime Information Cooperation & Awareness Center, in Brest.





## 2 DECEMBER

### Signature of the new Blue Charter

On the eve of the *Assises de l'Économie de la Mer* (Sea Summit), the senior executives of Armateurs de France's members convene and sign their new Blue Charter for responsible and environmentally friendly shipping. Created in 2003, the Armateurs de France Blue Charter is the basis of their commitments to environmental protection and social responsibility.

In 2019, French shipowners decided to revisit it in three chapters:

**"1. Placing people at the heart of our concerns; 2. Acting to protect the environment; 3. Maintaining the highest levels of safety;"**

thus reinforcing their actions towards all shipping company employees. On environmental issues, French shipping players develop a participative and concerted approach with public and private sector figures. They carry out their actions in favour of environmental protection and public health, staying closely attuned to technological progress.

"With this charter, shipowners acknowledge their social and environmental responsibilities and strive to live up to them honourably. Working conditions, quality of life aboard and ashore and training are all critical subjects for shipping companies that Armateurs de France intends to preserve and defend. Our rewritten Blue Charter, reflecting today's environmental challenges, is an illustration of our dynamism and intent. French shipowners are the key actors in sustainable, responsible and proactive shipping, founded on technological innovation. Our industry continuously demonstrates its ability to promote the transition to a low carbon economy, a crucial issue for the future of our sector and, more importantly, for our planet. Armateurs de France is historically committed to a Blue Economy that cares for the environment and people, and we will continue to spearhead this battle."

**Jean-Marc Roué,**  
President of Armateurs de France

## 2-13 DECEMBER

### COP 25

Armateurs de France is invited to speak during the promotion of the Niulakita High Ambition Declaration on Shipping by French Minister Élisabeth Borne. An opportunity to share its vision as a member of an expert panel on the participation of the shipping sector in the global effort in aid of the climate.



## 3-4 DECEMBER

### Sea Economy Summit (*Assises de l'Économie de la Mer*)

The highlight of the 2019 edition is the attendance of the President of the French Republic. Emmanuel Macron speaks again of possibility of opening a way "to reconcile ecology and the economy," paying tribute to the commitment and efforts of the French shipping sector, in particular the choice of LNG propulsion, measures to restrict bulk carrier speeds and progress on wind-assisted propulsion. At this major event for the Blue Economy, the coalition for the 'ecological and energy transition of shipping' is signed by its new members, among them Armateurs de France.



## 12 DECEMBER

### AFHYPAC colloquium

To conclude a year of work with the French Association for Hydrogen and Fuel Cell Batteries (AFHYPAC) which resulted in the formulation of a Commitment for Green Growth in favour of maritime and waterway mobility,

Armateurs de France takes to the stage during a morning of talks. This commitment will be signed in 2020 between the French Government and the relevant organisations. Armateurs de France will be there!





# WORKING FOR A BRIGHT BLUE FUTURE

WORKING FOR A BRIGHT BLUE FUTURE

From environmental protection and vessel safety and security to shipping competitiveness and social dialogue, Armateurs de France is hard at work every day to reconcile economy with ecology. Here's a look back on an eventful 2019.

*Wind of Change,  
Louis Dreyfus Armateurs*



Canopée, the future cargo ship  
by Jifmar and Zéphyr & Borée

## ENVIRONMENT FROM NECESSITY TO PRIORITY

In response to the climate emergency and issues of public health and biodiversity, Armateurs de France and its members, more actively than ever, are putting forward tangible solutions and reducing the environmental impact of their activities.

**2.8%**

of overall greenhouse gas emissions come from shipping

**50%**

reduction in GHG emissions targeted between 2008 and 2050 by the IMO

**0**

plastic waste allowed to be disposed of in the sea by vessels



*"France is a leading voice at the IMO on the issue of greenhouse gases. We meet very regularly with the French administration to share expertise, represent our companies and make our positions known. We consequently supported the French submission to the IMO on the reduction of vessel speed. Today, we are working on a goal-oriented approach which has been well received by this body. However we choose to do it, we must aim to reach our goal: reduce the carbon emissions of vessels."*

**Nelly Grassin,**  
Head of environment,  
safety and security  
at Armateurs de France

**T**wenty-three years after the Kyoto protocol and four years after COP 21, the environment emergency has become a universal preoccupation. In parallel with the implementation of the Global Sulphur Cap 2020 (see interview on page 6), shipowners must find solutions to fight global warming and meet the targets set by the International Maritime Organisation (IMO) in 2018: reduce vessels' greenhouse gas emissions by at least 40% by 2030 (in tonnes per kilometre) and cut the total volume of emissions by at least 50% by 2050 compared with 2008, also continuing efforts to decarbonise maritime transport.

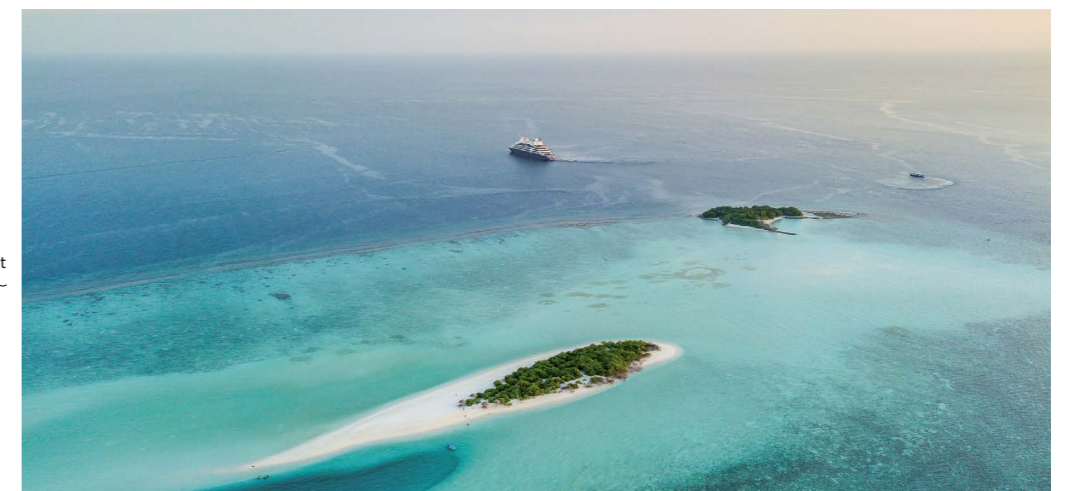
While it remains a priority to deal with these challenges, shipowners must also consider the effects of their activities on biodiversity. Indeed, in his speech at the *Assises de l'Économie de la Mer* (Sea Summit) in December 2019, the French President emphasised this point on several occasions. 2020 is set to be a crucial year in this respect, with key highlights such as the review of the national strategy for Marine Protected

Areas, the establishment of the biodiversity strategy announced as part of the European Green Deal, the hosting of the IUCN<sup>1</sup> World Conservation Congress, and the finalisation of the new United Nations treaty on the conservation and sustainable use of marine biological diversity of areas beyond national jurisdiction (referred to as the 'BBNJ'<sup>2</sup> process).

### Voicing the views of member companies

To advance collectively on these themes, Armateurs de France brings together experts from its member companies in its environment steering committee held several times a year. Issues such as the Global Sulphur Cap 2020, the planned ECA<sup>3</sup> for the Mediterranean Sea, reducing carbon emissions and underwater noise all featured at the centre of discussions in 2019. New theme-based workshops were also created. To further develop work on decarbonisation, the organisation meets with specialists in hydrogen or wind assistance to investigate tangible solutions to achieve this goal. →

Le Lapérouse, Ponant



1 International Union for Conservation of Nature  
2 Biodiversity Beyond National Jurisdiction  
3 Emission Control Area

Wind of Change,  
Louis Dreyfus Armateurs



*"Bunkering alternative fuels, providing shoreside electricity for vessels at berth or increasing the competitiveness of modal shift are all substantial technical and financial challenges for shipowners. These issues must be strongly reiterated and bring about the emergence of effective solutions for all port users. This is a message that we conveyed during talks on the national port strategy, on the occasion of the Interministerial Marine Affairs Committee and during parliamentary hearings on port competitiveness."*

**Flore Noirot-Ray,**  
Head of economics affairs,  
multimodality and ports  
at Armateurs de France



Another mission of the committee is to define the stances and orientations that Armateurs de France should advocate in the various debates taking place in European (ECSA<sup>4</sup>) and international (ICS<sup>5</sup>) trade bodies. Armateurs de France is also the mouthpiece for French shipowners in the French delegation at the IMO and always takes part in strategic committees (MEPC<sup>6</sup>) and technical subcommittees (PPR<sup>7</sup>) dealing with environmental matters. The organisation thus brings its expertise to the table, conducts monitoring and plays its part in shaping the regulation of the shipping of the future. Reiterating the diversity of sectors, being proactive and limiting regional measures are its ambitions!

### Shipowners making a stand

In 2019, shipowners decided to update the Armateurs de France Blue Charter to formalise their individual and collective commitments, on a level with the new challenges they

face (see page 14). The transition to a low carbon economy is clearly underway. Without delay, shipowners are already deploying the solutions available (see box on page 22/23). However, the real challenge is to make the shift, starting now, towards disruptive solutions that are low-carbon from well-to-wake. It is acknowledged that there will not be just one solution, but several solutions, each suited to different maritime uses: hydrogen, synthetic fuel, wind assistance or batteries. In this perspective, Armateurs de France acts within its ecosystem to ensure that progress is made on all subjects, and strives to facilitate dialogue between shipowners and technology providers who offer solutions suited to maritime transport. In the words of Jean-Marc Roué, president of Armateurs de France and its environment steering committee, "French shipowners are pioneers in the environmental field: always prepared to implement and promote the most recent solutions to protect the planet and mankind.

However, they cannot win the decarbonisation battle alone. It is essential to act today to create the supply chains of the future that can produce green fuel and support maritime innovation."

In spring 2019, Armateurs de France made an active contribution to the working group on the energy and ecological transition in French ports, launched as part of the French national port strategy. The organisation confirmed in particular that the 'greening' of maritime transport is a matter for the entire port ecosystem and that shipowners need ports to succeed in this transition. The challenges ahead are wide and varied: the development of a new supply chain for alternative fuels (sulphur-free fuel, LNG, biofuels, etc.); fitting quaysides with infrastructure to enable ship-to-shore power (terminals connecting to the national grid or connections to an LNG-fuelled power generator); improving the efficiency and fluidity of multimodal platforms to facilitate the transshipment of goods from vessels to barges or trains in order to accelerate modal shift from road to river and rail (see quote from Flore Noirot-Ray opposite). →

## 2019/2020: an active presence in international organisations

Reducing CO<sub>2</sub> emissions is a priority for French shipowners. Armateurs de France is involved in various bodies to represent the interests of its members and find the best compromise to reduce emissions, in accordance with the IMO's strategy.

**1— Armateurs de France conveys its positions to the ICS which sits on the IMO.** International shipping must speak with a single and ambitious voice whilst protecting the interests of the industry. To reduce carbon emissions, ICS is notably working on measures to be implemented before 2023 and on the creation of an R&D fund (see box on page 26).

**2— Within the French representation to the IMO, Armateurs de France, with the support of its members, has been working closely with the Maritime Affairs Department of the French Ministry for the Ecological and Inclusive Transition on the French submission aiming to reduce CO<sub>2</sub> emissions which was made in March 2020.**

The expertise of shipowners is essential in defining a measure which will be applied to all the vessels in the world. The organisation wishes for it to be effective, measurable and verifiable.

**3— In the ECSA, Armateurs de France backs the influence of the European Union in the IMO to promote ambitious decarbonisation policies whilst ensuring the implementation of measures with global scope, in contrast to regional scope which would generate competitive distortion.**



Mega Express Three,  
Corsica Ferries

4 European Community Shipowners' Associations  
5 International Chamber of Shipping  
6 Marine Environment Protection Committee  
7 Pollution Prevention and Response



*“We are strong believers in the virtues of multi-player dialogue to make progress on environmental questions. This is why Armateurs de France sits on the Executive Board of the Ocean & Climate Platform, a coalition of more than 80 members engaged in climate issues from the perspective of oceans and biodiversity. The work conducted in 2019 on the Platform’s new policy recommendations, published on the occasion of COP 25, illustrates the extent to which interactions with the scientific world and NGOs can help to advance together and efficiently.”*

**Cécile Rafat,**  
Legal adviser and environment and communications officer at Armateurs de France

### Turning to biodiversity

Seafarers are especially keen to protect their environment. Mitigating the risk of collision with cetaceans and reducing underwater noise pollution and the transfer of invasive species are just a few of the challenges that the maritime community is increasingly building into its environmental policies to reconcile its activities with the conservation of biodiversity. Armateurs de France seeks to promote the sometimes unacknowledged initiatives of shipowners in this area. During a parliamentary hearing on plastic marine pollution in September 2019, the organisation thus referenced the legal ban on plastic waste that applies to all vessels worldwide and paid tribute to the proactive work of French shipowners on the matter, who deal with the issue at source by phasing out the use of plastic on board.

In 2019, Armateurs de France furthermore entered into dialogue with WWF<sup>8</sup> and the French administration in the aim of further reducing the risk of collision with marine



mammals in the Mediterranean Sea. Armateurs de France and certain companies are also active on the issues of underwater noise, taking part in national and international expert communities or contributing to research and experimentation projects in various parts of the world.

Another noteworthy subject: the negotiations surrounding BBNJ, the planned international agreement for the conservation of biodiversity on the high seas. Armateurs de France provides negotiators with its insight on the potential effects of the future agreement on shipping. Alongside the ICS, a stakeholder in the process on an international level, Armateurs de France remains attentive to ensuring that the marine environment protection measures wished for by the industry continue to be negotiated and supervised by the

IMO, whose mandate and expertise are already acknowledged.

The maritime sector represents accounts for 90% of goods transported in the world. While it is the least polluting mode of transport per tonne carried, shipowners are more committed to the transition than ever and have set their sights on decarbonisation whilst also considering biodiversity issues. These challenges cannot be addressed alone: Armateurs de France will continue to restate this fact and focus upon the strength of collective action. —

8 World Wildlife Fund

### Tangible solutions



#### Liquefied natural gas (LNG)

This fuel which is key to the transition to a low carbon economy is a major response to public health issues. It reduces, or even eliminates, pollutant emissions. It also reduces greenhouse gas emissions by 8 to 20%. In June 2019, 318 vessels worldwide ran on LNG.

### Wind-assisted propulsion

An increasing number of shipbuilding projects use wind power either as their main form of propulsion or to assist another form of propulsion (diesel, LNG, electricity). With this renewable and free energy, wind assistance does not in itself generate any emissions at all.

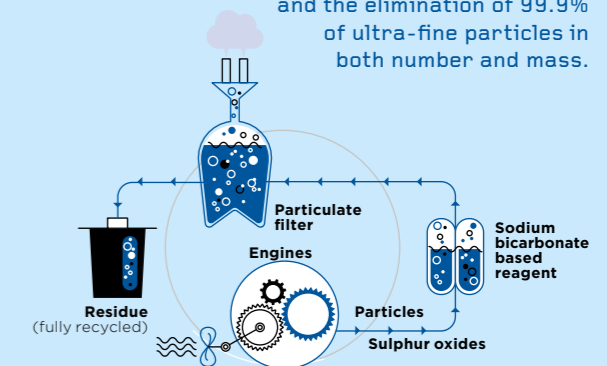


### Ship-to-shore power connection

By powering a vessel with a source of energy other than that of its engines during port stops, the solution eradicates most pollutants and greenhouse gas emissions, as well as noise pollution in ports.

### Particulate filters

La Méridionale has tested an innovative and secure particulate filter on its flagship *Piana*. The trial has proven successful, with the definitive results released at the end of 2019 showing sulphur oxide reduction compliant with the lowest MARPOL limit (0.1% SO<sub>x</sub> content) when using HSFO\*, and the elimination of 99.9% of ultra-fine particles in both number and mass.



\* High Sulphur Fuel Oil.

Bretagne,  
Brittany Ferries

## CONSOLIDATING THE COMPETITIVITY OF SHIPPING

On subjects of nationwide and international reach such as the Green Deal, tax legislation and Brexit, the experts at Armateurs de France remain at the helm to defend and reinforce the competitiveness of French shipowners and their sector.

### 125%

The amount of additional tax depreciation for the purchase of cargo or passenger vessels which use hydrogen or any other carbon-free propulsion

### 41

The number of maritime measures finally adopted in chapter 2 "Improving the competitiveness of maritime and waterway transport" in the Framework Act on Mobility

### 65 million

tonnes of freight and **15 million** passengers on average pass through French ports on their way to the United Kingdom each year



*"Our continuous actions ahead of the parliamentary debate around the Framework Act on Mobility have helped to add to, simplify and improve the legislative content, in matters relating to both social and environmental measures and to the safety and security of vessels. This is a source of considerable satisfaction, since the Government's Bill initially only included very few measures relating to shipping. Looking forward to the work on ministerial orders, Armateurs de France intends to remain an active and watchful partner of the Government to develop the French flag and French jobs in shipping."*

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

**D**efining an effective and tangible strategy for a policy to support and develop the merchant shipping fleet and its competitiveness: such was Armateurs de France's priority in 2019 in their contacts with French political and institutional counterparts, in particular during preparations for the Inter-ministerial Marine Affairs Committee and the reading of the 2020 Finance Bill. With this aim in mind, the organisation persistently reiterated its view that it was of crucial interest to maritime transport and service firms that fleet support measures (exemption from social contributions, tonnage tax and tax breaks for the acquisition of vessels) be perpetuated over the long term. These tools are essential and vital for the competitiveness of French shipowners, fostering innovation and a proactive approach from shipowners, specifically in the environmental field.

Accordingly, the entry into force on 1 January 2020 of additional tax depreciation measures for vessel

purchases or engine replacements to accelerate their shift towards eco-friendly practices, adopted the previous year following a lengthy process in which Armateurs de France played a substantial role, constituted a positive signal.

The parliamentary debate at the end of 2019 endorsed several modifications aiming to make the measures compatible with European law and fully operational. For example, the amount of additional tax depreciation applicable to vessel purchases will finally equate to a large proportion of the difference between the respective values of vessels using conventional propulsion and the same vessels using less polluting propulsion modes. Another legislative success was the inclusion in the 2020 Finance Bill of a reduced rate on an electricity tax (TICPE), applicable to berthed vessels. This necessary and welcome encouragement should lead port authorities to invest in electricity power supply

The Soléal, Ponant





*"In 2019, the European institutions were renewed. The Commission and Parliament built a shared vision based on a 'Green Deal', the cornerstone of legislative proposals to come. In June 2021, two prominent legislative draft proposals will be announced: the revision of the ETS Directive and the revision of the Energy Taxation Directive, which may jeopardise the tax exemption on bunker fuel. It is therefore important to keep an eye on these matters to ensure that they take sufficient account of our sector."*

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

terminals. →

Armateurs de France also represents and defends the interests of its members in more extensive scopes, such as in the 'Framework Act on Mobility', adopted in December 2019 after more than two years of preparation. Involved in all the consultation meetings and parliamentary hearings relating to the maritime strand of the Bill, the experts at Armateurs de France verified that the proposed measures fulfilled the needs of maritime companies as far as possible and, in so doing, contributed to several noteworthy improvements in the Bill (see quote from Laurène Niamba on page 25).

### Decarbonising - but how?

In another field, Armateurs de France is an active contributor to ongoing work in environmental policy and tax measures relating to the 'Green Deal' which aims to convert European industry to decarbonisation through the adoption of appropriate transition solutions. For the first time, the maritime sector could be included in the European Union emissions trading

system (ETS). Armateurs de France drew the attention of European and international institutions to the consequences for the sector of a system whose mechanisms are unsuited to the very nature of the vast majority of European shipping operations. Armateurs de France and the ECSA are also working in parallel on raising awareness among MEPs and the European Commission, and support the submission of the ICS proposing the introduction of an ambitious research and development fund for the maritime sector (see *Accelerating R&D* below). At the very least, Armateurs de France wishes to prevent any form of competitive distortion to maintain the competitiveness of its member companies, and therefore is opposed to any regionally-focussed measures (see quote from Mathilde Prete Capasso Torre left).

Environmental tax measures are also at the heart of the current work of Armateurs de France with the EU taxonomy, whose entry into force is likely to affect the conditions applied to borrowings from major institutions

### Accelerating R&D

**December 2019: accelerating R&D is necessary to reduce vessel carbon emissions. This is why international shipowner associations submitted a proposal to the IMO's Marine Environment Protection Committee (MEPC) to implement an R&D fund, financed by international shipping through a mandatory contribution of US\$2 per tonne of fuel purchased, and overseen by the IMO member states. The proceeds would amount to approximately US\$5 billion over 10 years which would be invested in plans to decarbonise maritime transport.**



The Esturial, Genavir



## Three questions to Gildas Maire,

Chairman of the Economy/Tax Committee at Armateurs de France and Chief Executive Officer at Louis Dreyfus Armateurs

### In what way is the question of finance crucial for Armateurs de France?

To develop internationally, maritime transport needs sufficient and affordable financing, but it is currently faced with a reduction in bank lending and an increase in its cost. The Economy/Tax Committee thus proposes concrete solutions to encourage the modernisation of the fleet.

### What is your view of the changes that are being planned on an international level?

It is essential that the initiatives undertaken both by the European regulator and by banks, as illustrated by the Poseidon Principles<sup>1</sup>, lead to competitive solutions and fair rules of play.

### What areas of vigilance have you identified?

Two matters will be receiving special attention: the implementation of stricter prudential standards for banks under the application of Basel IV, and the European Commission's threat to bunker fuel tax exemption in Europe.

in the very near future. The organisation is ensuring that the Commission builds into its thinking a series of parameters compatible with environmental transition solutions to which shipowners have access.

Maintaining measures specific to the maritime sector is also a major issue. Mission accomplished in 2019 for the tonnage tax scheme and, more generally, guiding principles with respect to state aid. Without forgetting the renewal, up until 2024 and in unchanged conditions, of the provisions of the category-based exemption rules for container ships.

### What next after Brexit?

Finally, 2019 saw the conclusion of the Withdrawal Agreement marking the United Kingdom's exit from the European Union. Armateurs de France contributed to the discussions of the ECSA's task force and, on behalf of the sector, led the talks with the French Prime Minister's administration to convey the concerns of shipowners and minimise the effect of Brexit on their activities. Armateurs de France also engaged in dialogue with the French Ministry of Economy and Finance to play a key role in the negotiation of the future relationship with the United Kingdom.

Because Brexit also provides an opportunity to sign new contracts! Armateurs de France will seek to ensure that the negotiations of the future trade agreement and the European Union's industrial strategy deliver market conditions that are as close as possible to the status quo and in no way allow competitive distortion on the Union's doorstep (see quote from Jean-Claude Charlo below). —



*"While Brexit has led to a quite unprecedented situation, DFDS Seaways is approaching this new chapter with confidence, in particular thanks to the support it receives from Armateurs de France. The organisation was a strong advocate for cross-channel firms during the no-deal anticipation period, and it will continue to stand up for the sector's stakeholders during the upcoming trade negotiations."*

**Jean-Claude Charlo,**  
Managing Director, DFDS Seaways

<sup>1</sup> A voluntary initiative launched in June 2019 setting up a standardised framework to assess the climate alignment of shipping financing portfolios in comparison with the emission reduction trajectory established by the IMO

Kincardine Offshore windfarm  
in Scotland, Bourbon



## SOCIAL DIALOGUE ALL HANDS ON DECK AT ARMATEURS DE FRANCE!

Promoting social dialogue and the training policy within professional branches is an integral part of Armateurs de France's core work. In this respect, the organisation offers its members high-quality advice on social affairs and, as their legitimate representative, acts on their behalf before government authorities.

**26,000**

direct jobs provided  
by maritime transport  
and services in France

**16,000**

seafarers: approximately 6,700  
officers and 9,300 ratings

**10,000**

sedentary staff

**O**n 31 May 2019, the Government kicked off its retirement scheme reform, with the launch of a vast consultation process conducted among citizens and social partners. The aim of this wide-ranging reform is to introduce a universal points-based retirement system, thereby bringing an end to the multiple special regimes in existence. Armateurs de France took up the issue from its inception and sought to defend the specificities of the special regime seafarers' in its discussions with the authorities. Since the end of 2019, the organisation has continually participated in pensions reform negotiations on behalf of the shipping sector.

### The main principles of the universal system

As a result of work conducted jointly with social partners and the administration, certain justified specificities of the seafarer regime have been conserved. These were reiterated in

a letter sent by the Minister of State for Transport, Jean-Baptiste Djebbari, and the Minister of State for Pensions, Laurent Pietraszewski. The ENIM (Établissement National des Invalides de la Marine) is thus maintained as the body managing the pensions and welfare scheme for seafarers. The universal retirement system will furthermore only apply to people born on or after 1<sup>st</sup> January 1987. Seafarers who have reached the age of 55 may, on completion of a cumulative period of 15 years, benefit from their pension eligibility. Finally, contribution rates will be harmonised with those of the universal system to ensure that seafarers have the same rights as the rest of the French population. The current employee contribution rate (10.85%) would thus rise to 11.25%. The current employers' contribution (ranging from 1.6% to 19.3%) would also converge towards that of all employers (16.87%). These increases will happen gradually over time and will be compensated for by the Government. →

### Judiciously negotiating the vocational training policy

The successful implementation of the Act for the freedom of choice of a future career, which notably includes the ambitious transformation of OPCAs into OPCOs, required that Armateurs de France started working with other social partners without delay. The creation of OPCO Mobilités materialises the desire not only to develop job disciplines in the merchant navy branches, but also to defend the interests of shipowners by taking on a leading role within the governance of the OPCO. Indeed, Armateurs de France is a member of the General Assembly and of the Board of Directors of the skills cluster, making it a true driving force with the ability to play a leading role in the directions taken. Moreover, in the shipping sector's professional branches, the organisation acted swiftly to form the Employment Councils for navigating personnel and sedentary personnel, the collective bodies tasked with defining the training policy and which it currently chairs.



### Three questions to Éric Derrien, Chairman of the Social Affairs Committee at Armateurs de France and of the shipping sector's collective bargaining commissions, and Managing Director of GENAVIR

**What is the role of the Social Affairs Committee?**

The Social Affairs Committee, within Armateurs de France, constitutes the main place in which discussions are held on employment and training issues in the shipping sector. It is also the employer body in which collective bargaining negotiations are prepared.

**What is your role as the chairman of the collective bargaining commissions?**

I ensure that commissions run smoothly, and I lead and steer negotiations. Furthermore, all the commissions' work is conducted in perfect coordination with employee trade unions.

**What commitments has Armateurs de France made on social matters?**

These commitments appear in the Blue Charter, i.e. guarantee good working conditions, act in favour of transparent and good quality management, promote jobs and training, foster quality of life in the workplace and encourage social dialogue.

**Outstanding business**

While certain core principles have been established, several areas remain unconcluded, to which Armateurs de France is paying the closest attention. These matters include periods subject to contributions that generate pension points, periods taken into account for early retirement entitlements and categories and base salaries. A specific working group, in which Armateurs de France is fully involved, was created by the Administration to examine these elements. The organisation welcomes the fact that the authorities has listened to its case in principle and will continue to make its members' voices heard.

**What date for implementation?**

The Parliamentary Bill on the creation of the universal retirement system was brought before the French Cabinet on 24 January 2020, and its article 7 gives the government latitude to use ministerial orders to adapt the provisions applicable to seafarers within a period of 12 months following the promulgation of the act. Currently being debated by MPs, the legal text should be brought before the Senate in June, then voted upon by MPs next summer. From that point, shipping social partners will have until summer 2021 to obtain the inclusion of the above-mentioned specificities in the relevant ministerial orders. Armateurs de France therefore continues to play an active role in this process, remains vigilant and will notify its members of all progress made in these matters.

**Conducting social dialogue**

As the only employers' representative organisation in the merchant shipping professional branches, Armateurs de France leads the negotiations on collective bargaining agreements covering its field of expertise (national collective bargaining agreements for navigating officers, ratings and sedentary personnel) to enhance the appeal of the shipping sector. In this respect, the organisation chairs and runs the secretariat of the negotiation commissions in the sector's branches (see quote from Maha Vandewalle right). It aims to be a driving force in discussions with social partners and welcomes the agreements signed in 2019. The vocation of Armateurs de France is to uphold the interests of the shipping sector and promote the best working conditions, and this requires high-quality social dialogue. This will guarantee the long-term future performance of the industry, which the organisation fervently advocates. —



*"The work to reduce the number of professional branches, which began in 2014, is not yet finished. Currently down from 942 to 200, this should drop even further. The possibility of merging the branches covered by Armateurs de France for navigating personnel with those of tug and ferry companies was proposed in June 2019. The organisation quickly responded to the government authorities, stating its desire to maintain the particularities specific to shipping's professional sectors, and it will not hesitate to reiterate this position if its voice is not heard."*

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

Le Bougainville, Ponant



**Agreements recently signed in the shipping industry's professional branches**

**1— Shipping company sedentary personnel branch**

- An amendment relating to minimum wages, signed on 10 July 2019, raising the minimum salary grids for 2019
- A PRO A agreement, concluded on 22 November 2019, implementing actions in support of re-training initiatives or promotion through block release training

- An agreement signed on 12 December 2019, creating a permanent collective-bargaining commission for negotiation and interpretation within the branch

**2— Shipping company navigating officers and ratings branches**

- PRO A agreements, signed on 22 November 2019, implementing actions in support of re-training initiatives or promotion through block release training

In 2020, the themes up for negotiation in these professional branches include minimum collective wage settlements, professional equality, working conditions, workforce and competency planning and development, compensating the effects of exposure to occupational risk factors and helping people with disabilities gain access to the employment market.

Marco Polo, CMA CGM



## SAFETY AND SECURITY TOTAL DETERMINATION

Armateurs de France continues to uphold its unfaltering commitment to ever safer navigation for vessels and their crews through its vital liaison with government authorities, the French Navy and its official counterparts.

### 360

acts of banditry or piracy were recorded in 2019 around the world, 111 of which in the Gulf of Guinea

### -50%

These incidents were halved in comparison with the peak reached in 2011 at the height of the attacks off the Somali coast

### Nearly 1/3

of all crude oil trade carried by sea passes through the Strait of Hormuz every day

**W**hile it dates back to ancient times, piracy is by no means a legend!

Operative modes have changed considerably, and this risk remains a major concern for vessels passing through certain zones, among them the Strait of Malacca - between Malaysia and Sumatra - or the Horn of Africa. But the most dangerous place in the world for piracy is the Gulf of Guinea, with 111 acts of banditry or piracy recorded in 2019. In parallel, illegal trafficking is putting crews at risk, in particular drug-trafficking which has been rising constantly in recent years, mainly from South American countries (see interview with Jacques G rault, right).

Armateurs de France takes steps to convey these concerns and find solutions. The organisation's Safety/Security Committees thus aims to promote the sharing of best practices. In the interests of efficiency, the European and international organisations are furthermore used to engage in joint and more powerful lobbying of decision-makers. In this respect, the ECSA is, for example, the main counterpart to help address the difficulties encountered with migrant rescue operations in the Mediterranean Sea. The ICS, meanwhile, represents and defends the interests of international shipping, most notably in its discussions with Nigeria on piracy off the coast of Lagos. →



### Three questions to Jacques G rault,

Chairman of the Safety/Security Committee at Armateurs de France and Institutional Advisor on French Maritime Policy at CMA-CGM.

**What zone worries you the most regarding security today?**

Unquestionably the Gulf of Guinea! In the past few months, this region has recorded an unprecedented escalation in crew kidnaps and violence. To make up for the powerlessness of national armed forces, vessels are themselves implementing security measures which are nonetheless insufficient to tackle the danger.

**What are you expecting from national and international authorities as regards piracy in general?**

Seafarers are increasingly unwilling to sail in this region, given the risks that it entails for their lives and their cargo. European or international cooperation must be initiated as soon as possible to bring an end to these violations.

**What other concerns do you have for shipping trade today?**

We are seeing an alarming upturn in drug trafficking by sea. Cartels are using vessels to carry drugs from South and Central America to Europe. In 2019, 30 tonnes of cocaine were seized on the vessels of French shipowners. This results in vessels being immobilised but more importantly seafarers being put at risk. We expect the States concerned to take more effective and concerted steps to protect shipping companies.



FREMM Normandie,  
French Navy



## Three questions to Admiral Prazuck, Chief of Staff of the French Navy

**In what way are the two navies essential for one another?**

For centuries, the role of military navies has been closely linked with the security of commercial shipping routes. With, on the one hand, the exponential growth of merchant shipping traffic over the past several decades and, on the other, the resurgence of physical threats to this traffic, this role as a guarantor of freedom of navigation is more essential than ever.

**What does 'working together every day' mean?**

We are members of the same community: we are all seafarers. We share the same values, the same lifestyles, which are sometimes very distant from those of our fellow citizens on dry land. We regularly bring assistance to a vessel in difficulty or a sailor in distress. To prevent more serious risks, we have implemented a voluntary information exchange organisation, with a control centre based in Brest, the MICA<sup>1</sup> Center.

**Whereabouts are the 'hot spots' today?**

Three geographical zones in particular require a permanent naval presence at the moment: the north of the Indian Ocean, the central and eastern Mediterranean Sea, and the Gulf of Guinea. In the Strait of Hormuz, we are now deploying a European naval force under French command which notably provides an escort to French merchant vessels on their request.

Another vector of action for Armateurs de France is about maintaining the essential bonds created between shipowners and French authorities to give French vessels the most precise overview of the situation and danger in the zone. This is notably the case for vessels passing through the Strait of Hormuz, which is currently experiencing a period of serious instability. In this area, the main contact remains the French Navy with which the organisation works closely on a daily basis (see interview with Admiral Prazuck, left). Twice a year, meetings between the Navy and shipowners see shipping company experts and officials from the Navy's central command come together to examine subjects of common interest. In 2019, at the Brest Maritime prefecture, the French security response to national shipping issues was at the centre of discussions in the presence of around 50 participants.



NC Descartes,  
Orange Marine



*"The safety of French vessels and their crews is a priority for French shipowners. We bring them together regularly in our dedicated steering committees and we take part in the Maritime Safety Committee (MSC) at the IMO where our conventions are constantly revised to take new risks into account. Terrorism, drug trafficking, piracy, cyber security: our main concerns have taken on greater importance in recent years and are consistently monitored on an everyday basis."*

**Nelly Grassin,**  
Head of safety, security and environment  
at Armateurs de France.

## Constant surveillance of cyber risks

Another issue discussed during these meetings is cyber security. The emergence of cyberspace in the shipping environment has been recognised as a major trend over the past few years. The maritime sector has taken full advantage of the explosion of information and communication technology to automate its processes, improve its efficiency, profitability and competitiveness. To harness these opportunities, this digitalisation has been accompanied by growing interconnection between information systems everywhere. This networking has not always been fully controlled and has generated serious risks which exacerbate the intrinsic vulnerabilities of the systems involved.

A strong signal of these new concerns came at the Inter-ministerial Marine Affairs Committee in 2018 when France elected to shine a light on issues relating to shipping cyber security, in terms of both protection and economic development, with the creation of a national cyber security coordination centre. The aim is to anticipate threats, manage risks and coordinate the actions of security operators. This led to the establishment of C2M2<sup>2</sup> in November 2019, with "foresight and regulation" and "risk analysis" committees in which Armateurs de France and several of its members play a role. Its purpose is to protect vessels and infrastructure, educate the sector,

be capable of responding to incidents... without forgetting to underline the specificity of shipping which requires the adoption of measures which are tailored to the sector and implemented on an international level.

## The advent of the autonomous vessel

This awareness of cyber risks has intensified with the imminent arrival of the autonomous vessel. In all events, autonomous vessels cannot operate without top quality cyber security. This issue is already under the supervision of the IMO which has taken up the subject and started to create a legal framework for these new vessels. Armateurs de France has become involved in this approach to accompany and support its pioneering members (see the example of SeaOwl below).

More than ever before, security risks and technologies are moving very fast. Armateurs de France continues to remain watchful and proactive, and fully intends to be a driving force for exchange within the sector and with its partners. —

## SeaOwl : First plans for a French autonomous vessel



In spring 2020, the maritime and offshore services company and member of Armateurs de France SeaOwl launched the first trial of an autonomous vessel in the Mediterranean Sea off the coast of the Provence coast with an 80m ship from its fleet. In partnership with Marlink, this operation will be conducted to guarantee better quality communication lines and pay greater attention to cyber security.

If its project is validated, SeaOwl will begin the construction of a 20m prototype that will work on offshore oilfields. Armateurs de France, alongside the Permanent Representation at the IMO, is involved in regulatory works governing the development of autonomous vessels.

1 Maritime Information Cooperation & Awareness  
2 Cybersecurity Council for the Shipping World

# ROLLING OUT THE BLUE CARPET

ROLLING OUT THE BLUE CARPET

As the representative trade organisation of an industry directly employing 26,000 people, Armateurs de France is the reference body in the development of a solid and prosperous economy and jobs in shipping. It draws on a team of experts who are key to successfully defending the interests of its members.  
Find out more in the following pages.

Africa Two, CMA CGM

## ARMATEURS DE FRANCE AT A GLANCE

The only trade association representing French maritime transport and service companies.

### Key figures

**1903**  
Date of establishment

- 7** fields of expertise
- European affairs
  - Legal affairs
  - Port affairs
  - Social affairs and training
  - Economics, tax and insurance
  - Environment
  - Safety and security

**60** member companies

**1,000** ships operated or controlled

**26,000** direct jobs  
= 16,000 seafarers + 10,000 land-based staff

A diverse range of sectors with multiple needs and expectations



Offshore activities



Marine sand supply



Assistance and rescue



Oceanography and undersea research



Submarine cable laying



Port services



Cargo transport



Passenger transport



A tailor-made organisation to best serve its members' interests

#### Bureau

The President + company managing directors

#### Executive Committee

The main decision-making body, made up of about 20 member companies who meet — **5 times a year** —

#### Steering Committees

- Social affairs
- Economy/Tax
- Environment
- Safety/Security

— **14 in 2019** —

#### Working groups comprising company experts in:

- Communications
- Legal affairs
- Seafaring issues
- Land-based issues

— **17 in 2019** —

**Ad hoc working group** such as the 'New Blue Charter', 'Low-carbon solutions' or 'Noise pollution' groups

— **18 in 2019** —

### Wide-scale reach



**Armateurs de France has a seat on official bodies which include:**

- the High Council of the merchant navy (*Conseil Supérieur de la marine marchande*)
- the High Council of Seafarers (*Conseil Supérieur des gens de mer*)
- the national shipping sector collective bargaining commission (*Commission nationale de la négociation collective maritime*)
- the board of directors of the French Maritime Academy (*École nationale supérieure maritime*)
- the board of directors of the Mobility Professions Skills Agency (*opérateur de compétences des métiers de la mobilité*)

**Armateurs de France is a founding member of the French Maritime Cluster.**



**Armateurs de France is a member of:**

- the European Community Shipowners' Associations
- the International Chamber of Shipping
- the Baltic and International Maritime Council



Collective missions

**Defend** and **promote** the interests of French maritime companies

**Represent** companies in French, European and international bodies

**Communicate** and **promote** the image of shipping

**Negotiate** collective bargaining agreements and industry-wide agreements

**Inform** and **advise** its members on a daily basis

Values upheld by the entire crew



**Commitment**



**Reliability**



**Proactivity**

## MEET THE CREW



Seated (from left to right): Jean-Marc Lacave, Managing Director; Maha Vandewalle, Head of social affairs and training; Nelly Grassin, Head of environment, safety and security; Laurène Niamba, Head of legal and tax affairs.

Standing (from left to right): Mathilde Prete Capasso Torre, Head of European affairs; Agnès Rincé, Head of communications; Marie-Claire Denicourt, Head of accounting and human resources; Fayrouz Chebil, Office manager; Cécile Rafat, Legal adviser and environment and communications officer; Philippe Costa, Head of general affairs; Flore Noïrot-Ray, Head of economics affairs, multimodality and ports.

## WELCOME ABOARD!



### Jean-Marc Lacave

*What's my background? I hold an engineering degree from Ponts et Chaussées and I was director of the Le Havre Port authority from 2000 to 2008 before joining the executive board of CMA CGM. I was then CEO at Météo France from 2014 to 2019, and I have been Managing Director at Armateurs de France since September 2019. Environment, economics, employment, safety, geopolitics... Shipping is a distillate of issues which in many ways reflects "the ways of the world".*

**Up close and personal :** *One of my fondest memories is of taking a pilot boat to board a large vessel and help it dock... a tricky challenge but a magnificent experience!*

### Cécile Rafat

*On my first day at Armateurs de France, I was surprised to join a team which was almost totally made up of women, in a quite male-dominated sector. Just look at the team photo! My main source of motivation? Being in tune with my times by contributing to the green energy transition: this is a noble everyday challenge that we will rise to collectively.*

**Up close and personal :** *When I was 7 on my first dinghy lesson, I drifted out to sea... talk about scary! But it all turned out well in the end.*



### Fayrouz Chebil

*I'm a young graduate: I earned a degree in English from the Sorbonne, followed by a master's degree in European and International studies. I then went to a communication and journalism college... before joining Armateurs de France. Today, if I were to list three qualities that are essential in my job, I would say without hesitation: discipline, versatility and interpersonal skills.*

**Up close and personal :** *Before I came to Paris, I always lived less than 100 metres away from the Mediterranean. My father was the legal affairs director of my town's marina. It was as if I had the keys to the place!*

### Maha Vandewalle

*Being a legal adviser requires creativity, analysis and strategy. What's more, employment law is changing all the time. I have new challenges to deal with every day, so there's not much time to be bored. And something else: here I'm in contact with areas that I knew nothing about previously: environment, energy, safety... And these issues are global!*

**Up close and personal :** *With my Mediterranean origins, I've got a soft spot for the sea. There's nothing better than its calm and serenity to recharge your batteries!*



### Mathilde Prete Capasso Torre

*Open-mindedness, challenges and complexity! Three words that describe my everyday job quite well. The contact with our members is very rewarding and helps me get to grips with what's happening on the ground and understand the issues of the various sectors represented by our organisation. Shipowners don't have a very positive ethical image, and yet the shipping world is changing fast. Our job is to tell the world, loud and clear!*

**Up close and personal :** *I grew up in Italy. As a child, I spent my weekends by the sea on Mount Circeo, one of the last stops on Ulysses' journey back to Ithaca.*

# MERCHANT FLEET OPERATING UNDER THE FRENCH FLAG AS AT 1 JANUARY 2020

Transport fleet: 186 ships

SHIP TYPE	Quantity	GT <sup>1</sup>	DWT <sup>2</sup>
CARGO	15	31,549	21,537
CEMENT CARRIER	2	4,823	6,050
CONTAINER SHIP	30	2,605,372	2,749,808
CRUISE SHIP	11	100,435	12,819
FERRY	46	776,333	146,358
GAS CARRIER	7	386,326	344,305
PASSENGER SHIP	19	10,297	2,867
RESEARCH AND SUPPLY VESSEL	1	9,403	4,871
RORO SHIP	19	148,959	65,418
TANKER	36	1 933,194	3,675,893

Service fleet: 242 ships

SHIP TYPE	Quantity	GT <sup>1</sup>
BUOY TENDER	10	3,473
CABLE LAYER	9	99,836
DREDGER	14	35,578
MARITIME WORKS SUPPORT VESSEL	15	13,431
OFFSHORE SERVICE VESSEL	64	164,174
PILOT BOAT	1	499
RESEARCH VESSEL	6	14,099
SAND DREDGER	5	10,596
TRAINING SHIP	2	1,081
TUG BOAT	116	43,381

10.5 YEARS The average age of the French fleet compared to 17 years worldwide

1 Gross Tonnage  
2 Deadweight Tonnage

# THE MEMBERS OF ARMATEURS DE FRANCE

AGENCE MARITIME DE L'OUEST • BESSÉ • BOLUDA FRANCE • BOURBON OFFSHORE SURF • BRITTANY FERRIES • CAN • CARIBBEAN LINE • CCI BAYONNE • CEDRE • CMA CGM • COMPAGNIE POLYNÉSIENNE DE TRANSPORT MARITIME • CONSEIL DÉPARTEMENTAL DE CHARENTE-MARITIME • CONSEIL RÉGIONAL DE BRETAGNE • CORSICA FERRIES • DFDS SEAWAYS • DRAGAGES, TRANSPORTS ET TRAVAUX MARITIMES • EYSSAUTIER • FILHET ALLARD • GASPE • GAZOCEAN • GENAVIR • GEOGAS MARITIME • GIE COMPAGNIE MARITIME DU LITTORAL • GREENSHIP GAS • GROUPE LHD • HELVETIA ASSURANCES • INGEPAR • IXBLUE • JIFMAR OFFSHORE SERVICES • LA MÉRIDIONALE • LD BULK • LES ABEILLES • L'EXPRESS DES ÎLES • LOUIS DREYFUS ARMATEURS • MARFRET • MARITIMA • MARITIME NANTAISE • 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 • SEA-TANKERS • SOCATRA • SOCIÉTÉ DE DRAGAGE INTERNATIONAL • SOCIÉTÉ DE TRANSPORTS FLUVIO - MARITIMES DE L'OUEST • SYNDICAT PROFESSIONNEL DU LAMANAGE DES PORTS DE LA MANCHE, DE LA MER DU NORD ET DE L'ATLANTIQUE • THOMAS SERVICES MARITIMES • TOTAL ACTIVITÉS MARITIMES • TOTAL GLOBAL LNG • TOWT — TRANSOCEANIC WIND TRANSPORT • V.SHIPS FRANCE



47, rue de Monceau, 75008 Paris — France  
Tel.: +33(0)1 53 89 52 52

[www.armateursdefrance.org](http://www.armateursdefrance.org)  
@ArmateursFR