

Maritime Summary Note n°248 – February 2023

« French seafarers : a strategic profession »

A prominent and salient issue of the Fontenoy du Maritime conference in 2021—at the very heart of the social dumping debate in the English Channel, yet concurrently driven by corporate demand across the LNG, container ship, and MRE sectors—the French seafarer stands as much as an economic subject as a social one. Their training, employability, career path, and value represent as much a matter of public policy as a core strategy within the expansion of shipping companies. In France, the wider maritime cluster employs more than 400,000 personnel, but most notably encompasses 38,000 active merchant and fishing seafarers navigating across a variety of sectors (fisheries, aquaculture, yachting, services, and transport), injecting substantial value added into the French economy. For the merchant marine seafarer, a wide variety of activities coexists, spanning freight and passenger transport, marine scientific research, cable or maintenance works, maritime and port services, and offshore engineering. For all these specializations, seafarers must command highly sophisticated, rapidly evolving technical skills, alongside strong human qualities and an immense capacity for resilience tied to fluctuating work patterns and the harshness of the marine environment. The profession is strictly framed and regulated on an international scale by social conventions (the MLC 2006) and global training benchmarks (the STCW Convention). Socially, the equation proves inherently more thornier because the seafarer, much like workers in alternative transport modes, remains tied to their domestic national regulations while operating within globalized frameworks characterized by fierce international competition. The French seafarer is geostrategically vital for French maritime operations, presenting acute stakes regarding their training, operational professions, and global economic positioning.

Maritime training: an initiatory career path

The long-standing adage goes: "one is not born a seafarer, one becomes one." To achieve this, individuals must train across a wide palette of seafaring professions. Multiple educational pathways exist in France, scaling from the vocational aptitude certificate (CAP) to professional master's degrees in engineering, alongside the maritime higher technician certificate (BTS). These programs are dispatched within public educational institutions and private accredited bodies operating under the direct tutelage of the ministry responsible for maritime affairs. In 2021, more than 45,000 professional maritime certificates and endorsements were formally issued. The vocational maritime high schools (Lycées Professionnels Maritimes) and the ENSM (French National Maritime Academy) serve as the cornerstones for seafarers' education, training respectively 1,600 pupils and over 1,200 students across initial or continuous professional frameworks during the 2022–2023 academic year.

Nevertheless, maritime professions suffer from a chronic lack of public visibility and structural attractiveness. In late 2022, the French State Secretariat for Maritime Affairs officially launched "formationmer", a brand-new centralized internet portal dedicated to maritime training and careers.

This structural disaffection is driven for some by an expanding gap separating the aspirations of younger generations from the operational characteristics of life at sea. Balancing family life with life on board can prove highly complex. These also remain inherently high-risk professions with exposure to substantial physical hazards. Furthermore, the global maritime labor market is currently so open face to an acute worldwide shortage of seafarers that the historical fear of leaving one's employment is no longer relevant; traditional vertical promotion is no longer a sufficient factor for employee retention among upcoming generations. Finally, the global health crisis severely tarnished the image of the seafaring profession: it was marked by protracted contract extensions on board, a professional category initially denied priority status for vaccination access, and systemic crew-change bottlenecks whose disruptions still persist within selected regions of the world.

Training is structured via the Vocational Maritime and Aquaculture High Schools (*Lycées Professionnels Maritimes et Aquacoles* — LPM/LPMA), which number twelve institutions scattered across the various metropolitan maritime façades. These public high schools provide initial secondary education (maritime CAP and vocational baccalaureate) and higher education (maritime BTS) for students intending to enter seafaring professions across the fisheries, merchant marine, yachting, and aquaculture sectors. For future navigators, selected training programs are focused on the deck side (*Conduite et Gestion des Entreprises Maritimes* — CGEM), while alternative paths focus on the engine room (*Électromécanique de Marine* — EMM); a polyvalent dual-purpose vocational baccalaureate is also available. Some students subsequently transition into the ENSM to complete their education and secure watchkeeping officer or master certificates.

The maritime BTS programs are accessible to holders of non-maritime baccalaureates following a mandatory one-year bridging class (*classe de mise à niveau*). While maritime training sectors have suffered from a deficit in attractiveness for several years (-15% over a six-year period), the decline in student enrollment appears to be contained, with 660 greenfield students in 2022 compared to 618 in 2021. The background of the student body is shifting: an increasing number of high schoolers do not originate from seafaring families and, for some, reside far from the coastline. These young navigators are also more demanding regarding the integration of environmental stakes into their professional practice, as well as their working conditions. Furthermore, maritime high schools act as major operators for seafarers' continuous professional development, as navigators must revalidate their certificates and endorsements every five years. Every watchkeeping and crew profession is currently facing acute structural tension; beyond the deficit in attractiveness, employers are concurrently confronted with severe hurdles regarding employee retention.

The French National Maritime Academy (*École Nationale Supérieure Maritime* — ENSM) trains merchant marine deck and/or engine officers through initial education paths spanning from three to five and a half years. Inheriting the legacy of the historical hydrography schools and national merchant marine academies (*Hydro / ENMM*), the institution is established across four distinct campuses: Le Havre, Marseille, Saint-Malo, and Nantes. The French higher maritime education framework is fully aligned with the European harmonization of higher education degrees (the LMD *Licence–Master–Doctorat* architecture) and is articulated around two core tracks:

- Initial Education: encompassing on one hand the polyvalent (dual-purpose) track, which leads, after five and a half years of study, to the Higher Studies Diploma of the Merchant Marine (*Diplôme d'Études Supérieures de la Marine Marchande* — DESMM), followed—after a mandatory operational sea-time service of 36 or 48 months—to the unrestricted First Class Captain's Certificate (C1NM) without tonnage or propulsion power limitations. On the other hand, it encompasses the monovalent (single-purpose) tracks for deck (*OCQPi* / Captain 3000) and engine (*OCQM* / Chief Engineer 8000 kW), structured over three years and capable of being complemented by unrestricted Master or Chief Engineer programs requiring an additional year of study.
- Continuous Professional Training: comprising monovalent deck or engine tracks that train Officer of the Watch (OOW / *OCQP*) / Captain 3000 profiles, as well as Officer of the Engineering Watch (*OCQM*) / Chief Engineer 8000 kW profiles in one year, scaling up to unrestricted Captain and Chief Engineer certificates over a three-year cycle.

Since 2011, the academy has secured formal accreditation from the Engineering Title Commission (*Commission des Titres d'Ingénieur* — CTI). The ENSM has thus evolved into an institution authorized to award the certified degree of Graduate Engineer of the ENSM, split into two distinct specializations: *Sailing Engineer* (maritime officer) or *Marine Engineering and Offshore Technology Expert*. The recent structural reform of maritime training curricula addresses the perceived vulnerabilities of the legacy framework: namely, an excessive technical specialization that restricted students solely to the seafaring trade—rendering them highly vulnerable to macroeconomic shipping cycles—alongside institutional isolation and a chronic lack of public attractiveness.

This opening took the form of the creation of a *Sailing Engineer* degree alongside several engineering master's programs, explicitly designed to facilitate the recognition of educational quality, boost students' employability, and enhance the academy's public attractiveness. However, as highlighted by a 2018 report from the French Court of Auditors (*Cour des comptes*), the value added of this engineering title is not deemed essential by shipowners, who have not yet identified its practical operational benefit.

Conversely, the deployment of increasingly complex shipboard embedded systems can alternatively justify an engineering degree.

For their part, students remain deeply divided over this engineering title: some expect it to create a welcome fluidity between professions and facilitate shore-based career transitions, while others fear a standardization (*banalisation*) of their skills, smoothing away their operational uniqueness. The risk inherent to this engineering concept would thus be to produce graduates who are undeniably competent, but psychologically unprepared for the harsh realities of life on board.

The number of available slots for the competitive entrance examination of the sailing engineer curriculum—fixed annually by the supervisory authority following consultations between the academy and ocean carriers—has frequently fluctuated since the school's inception: it shifted from 190 slots in 2011 to 180 in 2022, after plummeting to a low of 120 in 2017. This structural level is primarily conditioned by the immediate capacity of shipowners to provide onboard cadet training slots during the academic curriculum, rather than by five-year medium-term hiring projections. The latter are, in fact, highly unreliable given the difficulty of forecasting labor market trends within cyclical shipping industries, compounded by the "evaporation" phenomenon of graduates whose seafaring careers are frequently short. In France, a study conducted by the Céreq (*Centre d'études et de recherches sur les qualifications*) demonstrated that the choice to stop navigating polarizes heavily between 30 and 35 years of age, translating into an average of just over seven years of active navigation. For officers, the national market has entered a phase where the volume of job openings under French contracts significantly outnumbers available navigators. Consequently, the Government's official objective targets doubling the number of trained officers graduating from the ENSM by 2027. Concurrently, the academy has deployed a 12-point strategic roadmap to maximize institutional efficiency regarding training paths, corporate partnerships, communications, and international influence.

The looming risk of an officer shortage

The intensification of short-term career patterns among merchant marine sailing officers has maintained, for over 15 years, the permanent spectrum of an acute officer shortage, despite the hyper-cyclical nature of international maritime trade. As a result, numerous institutional studies regularly sound the alarm on the imminent risk of a global officer deficit, estimated at several thousand professionals.

The conditions underpinning this structural disaffection are multifaceted:

- The difficulty of balancing family life (most notably the "second-child effect") with prolonged periods of operational navigation.
- The expanding burden of regulatory safety rules and compliance standards.
- The omnipresence of reporting mandates and procedural justifications.
- Automation tools that strip the seafarer of their traditional role as a skilled navigator, where shore-based management instructions reinforce a profound feeling of alienation (*sentiment de dépossession*) among sailing officers.
- The loss of career attractiveness for long-term seafaring pathways.
- The isolation and fragmentation of shipboard communities under the dual impact of new communication technologies and onboard multiculturalism.

Compounding this equation is an intensified demand on the shipowners' side, driven by the continuous expansion of the global merchant fleet. The cumulative consequences manifest as skyrocketing stress, operational burnout (*lassitude excessive*), and a diminishing appeal for the trade that even premium wage packages can no longer successfully offset. Seafarer retention on one hand, and recruitment attractiveness on the other, must be embodied through enhanced institutional dialogue, where the absolute predictability of embarkation cycles stands as a critical focal point.

The widespread quest for meaning at work (*quête de sens*) traversing modern civil society is equally impacting the merchant marine sector. The onboard human experience will inherently differ between a mega-container ship operated by CMA CGM, a high-value offshore unit dedicated to MRE installations, or a luxury cruise liner managed by Ponant. In this landscape, alternative propulsion modes—most notably wind-assisted shipping—represent a highly refreshing opportunity for technological and vocational renewal for upcoming generations of seafarers.

Maritime employment demographics in France

Outside shore-based personnel, maritime employment in France is split into distinct functional categories. On one hand stand the sailing crews, divided between officers and ratings (PEX — personnels d'exécution) responsible for the safe navigation and operation of the vessel. On the other hand stand the hospitality and service crews working on board passenger vessels (ferries and cruise ships).

Regarding the sailing crews, their total volume was estimated at 14,800 active seafarers in 2020 (combining ratings and officers). Between 2010 and 2020, their total headcount contracted significantly by 10%, marked by a notable 9% loss between 2019 and 2020 triggered directly by the global health crisis. International short-sea shipping (cabotage) concerns 40% of these navigators, and more than half of them operate on board passenger vessels. Furthermore, a substantial second-career track routinely materializes ashore within the corporate support and technical management functions of shipping lines.

Structurally, officers represent 47% of the sailing workforce, compared to 53% for ratings. The feminization of the officer corps posted a marginal increase of +1.1% between 2010 and 2020, reaching 3.8% of the total officer workforce in 2020. At the absolute rank of Master (capitaine), women account for a mere 2% of active profiles. However, the female seafaring population remains significantly younger than its male counterpart due to a recent acceleration in female recruitment.

Concerning the ratings (PEX), one-quarter operate as ordinary or able seafarers (matelots), specialized ratings account for 20%, and catering personnel represent 18% of the workforce. The remaining staff is distributed among cadets/trainees, motormen/mechanics, passenger reception agents, cooks, hospitality staff, and retail personnel. Female representation is structurally higher among ratings (17.2%) than within the officer corps.

Social frameworks and labor conditions

International maritime transport is, by its very nature, globalized and consequently characterized by vast social disparities. The Maritime Labour Convention (MLC 2006), which entered into force in 2013 under the aegis of the International Labour Organization (ILO), provides a universal regulatory framework for maritime labor law. It codifies the absolute minimum social standards to which seafarers are entitled, regardless of their nationality or the flag State of the vessel on board which they operate. Nevertheless, the MLC 2006 does not function as an active instrument to eradicate social dumping, but merely establishes an international baseline floor.

At the regional tier, the European free market serves as the bedrock for intra-community maritime transport and service operations. Market protections or reservations facing domestic trades can only be executed within the strict boundaries of European law, which guarantees open access to EU corporations, community registries, and EU seafarers alike. Following successive EU enlargements, nations commanding highly competitive open registries and alternative wage baselines were integrated into the European liberalization process. The internal delta in social conditions across the EU is large enough to sustain phenomena of intense over-competitiveness of certain national registries over others. Seafarers' wage scales based on their countries of origin exert a massive incidence on a vessel's operating costs (OPEX), carrying a powerful multiplier effect regarding the reception, catering, and service personnel specific to the passenger transport sector. Consequently, there are no unified, common rules governing working conditions across the EU (such as standardized leave or working hours); national legislations and branch collective agreements remain inherently divergent. France—with its mandatory 35-hour legal workweek framework and its rigid administrative management of crew roles and compensatory rest periods—operates under a model that structurally pushes social standards upward.

These employment conditions for French seafarers apply across diverse competitive market segments and under alternative national registries. Indeed, for commercial shipping and marine service operations, France commands a multi-layered registry architecture: the First Register (Premier Registre), the French International Register (RIF), and the Wallis and Futuna registry, supplemented by the specific registries of the Pacific Overseas Territories (COM) tailored for localized regional fleets. These registries outline the social framework for shipowners while securing foundational employment pillars for French seafarers.

Like many European nations, France maintains an international register that allows French, as well as foreign, shipping lines to operate vessels in France with a mandate of only 25% EU/EEA seafarers, serving as one of the primary employment reserves for French officers. This framework notably governs the mega-container ships of CMA CGM, Socatra's tankers, Orange Marine's cable ships, Bourbon's offshore service vessels, Jifmar's marine work crafts, and the fleets placed under the ship management of Geogas, Knutsen, Euronav, and Alcatel. To this architecture must be added the Wallis and Futuna register, which is strictly reserved for the cruise sector, most notably layout with the luxury company Ponant. Approximately 3,000 French seafarers operate under the RIF (Registre International Français). Their future remains fundamentally dependent on the economic performance of shipping lines within a narrow circle of employers, albeit of international stature. While the anticipated growth of the liquefied gas sector and the rapid expansion of Marine Renewable Energies (MRE) fuel structural optimism, the sudden collapse of the seismic research sector a few years ago dictates absolute caution.

The First Register trapped in competitive turmoil

The French First Register (Premier Registre) is strictly reserved for domestic cabotage, harbor, and coastal operations (freight, passenger, and marine services), island link networks, and, by explicit political choice, ferry corridors linking France to North Africa and the British Isles (companies wishing to operate under French manning rules on these lanes can do so exclusively under the First Register). France cannot legally impose the sole usage of the French flag on companies operating lines toward Corsica, as European maritime regulations permit the deployment of any EU register. Consequently, Corsica Ferries systematically deploys the Italian international register between Toulon/Nice and Corsica. French shipping lines operating under a public service delegation (DSP — Délégation de Service Public) view this as a form of unfair competition, as the Italian register brings social and labor costs that are slashed by half. Numerous stakeholders call for extreme vigilance regarding Host State Control rules (règles de l'État d'accueil), namely the strict enforcement of national regulations permitted under European frameworks. This diagnostic applies equally to the presence of European companies and flags within the emerging MRE sectors. It is thus the sole responsibility of the State to ensure that intra-European competition does not destroy the employment of French seafarers across domestic markets.

On maritime trade corridors linking France to Ireland, which are purely intra-community lanes, the choice of registers remains completely unrestricted. For Great Britain, Brexit changes nothing regarding this operational freedom, but it completely erases any constraints derived from European community labor law. In practice, only a single case of a non-European flag operates on these lanes (Polish-managed ferries flying the Bahamas flag). European Ro-Ro and ferry companies systematically utilize European registers for a straightforward macroeconomic reason: securing the fiscal opportunity of the tonnage tax. This State aid mechanism grants shipowners the faculty to opt for a corporate tax regime calculated on the net tonnage of their active fleet rather than being subject to standard corporate income tax. This rule applies across the entirety of Europe, including Malta and Cyprus. The same logic governs the net wage principle—a targeted fiscal device providing an exemption from employees' social security contributions and contributions. The objective focuses explicitly on offsetting the higher cost of domestic national seafarers.

To be absolutely clear, the employment of French seafarers under the First Register within the ferry sector does not clash against exotic flags or extra-community crews. It unfolds strictly within the European legal framework and between Europeans. Therefore, the social dumping crisis unfolding across the English Channel represents a highly specific problem. The short-sea Channel sector was severely battered by the drop in traffic tied to Brexit and the pandemic. Facing intense financial distress, P&O Ferries (a subsidiary of the Dubai-based terminal operator DP World) adopted the Cyprus register in 2019. In March 2022, the group abruptly terminated over 800 British seafarers. While sailing officers were eventually re-hired, the ratings (PEX) were internationalized through outsourced manning contracts revised sharply downward. This triggered a massive political controversy in Great Britain, setting in motion a new Seafarers' Wages Act compelling ferry companies to guarantee a domestic minimum wage for all crews calling regularly at British ports.

In 2021, the arrival in Calais of Irish Ferries under the Cyprus flag further intensified this social dumping trend permitted by European registers and offshorised crew management practices, directly threatening French maritime employment in Calais. Unfair competition, social precarity, and severe hazards to maritime safety are concrete realities. Harmonizing the stringent French social framework with minimal

international baselines remains exceptionally complex. In the short term, France and the United Kingdom must define a competitive framework that is fair and socially acceptable, whether enforced via bilateral legislation on both sides of the Channel or structured through an industry commitment charter. However, the exact criteria to be applied naturally pit social partners against one another. The deeper question remains structural and European: it demands the adoption of an enhanced, upgraded European MLC governing both wage minimums and maritime working conditions. It is as much a matter of social justice for European navigators as it is a vital prerequisite to safeguard the vocational attractiveness of seafaring trades and ensure the absolute safety of navigation at sea.

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