

STUDY ON EU SEAFARERS EMPLOYMENT

FINAL REPORT

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1. FOREWORD

Even if direct interest in the employment of Nationals and European seafarers can differ between the actors of maritime industry in EU, the opinion on the need to maintain a good level of employment of European seafarers on European ships is largely shared by the flags States authorities, the shipowners and the unions. The large campaigns' promotion on jobs at sea and recruitment, launched these past years in most of the European countries, demonstrate that social partners and National Administrations are aware of the risk of losing European know-how in the maritime industry, both on board ships but also in the maritime clusters' activities ashore, where employment of past seafarers is an essential work-force.

As a **Task Force** on maritime employment and competitiveness has been set up by the DG-MOVE, it appeared that the lack of existing statistics in the field of maritime employment would cause a considerable difficulty to consider correctly the question of employment of seafarers in EU.

After general considerations on the number of seafarers in EU countries, and well recognised downward trends in favour of seafarers from third countries, it is clear that detailed data on maritime employment is scarce, sometimes outdated and often not reliable. Moreover, **the great differences from a country to another in data collect and presentation of results prevent all serious analysis on employment structure and evolution.**

In the light of the above consideration, the DG-MOVE wanted to clarify the information available on the employment of seafarers in EU with a specific study to provide a picture on the employment of European officers and ratings on-board EU and EU controlled ships.

The objective of the study was not to embark upon a long exercise, mobilizing important means, but in a rather short term, try to have a most comprehensive view of seafarers' employment in Europe, clearly organised in a consistent way. In this aim, three main axes have been defined:

- Make an inventory of existing data and fill the gaps by providing supplementary information when the latter is missing or poor, and by updating information when it is out of date.
- Provide a structure overview of the current employment of EU seafarers working on board EU, non EU ships and EU controlled ships.
- Provide reliable data helping to assess the scope of challenges impacting the shipping industry (shortages or surpluses of seafarers) in order to provide solid material for the Task Force to make recommendations for the future maritime social agenda.

It seems that such an approach has never been carried out before. It quickly appears that the challenge was high and despite enlarged researches in the field of data about seafarers' employment in Europe, **the result of the study can seem rather disappointing.** In particular, the original project of the study, which was to present the detailed employment of officers and ratings for each country (by ship's type and department for Intra-EU/Extra EU traffics, and foreign flag ships, age profile and women employment) under a **standardized table form**, appeared to be impossible to

achieve because of a **lack of available data in most countries, and for some of them of no existing data at all.**

At least, the study, as others before, highlights the need to set up a harmonised collecting data system in Europe in the field of seafarers' employment.

Again, the purpose of the study was not to make an attempt to estimate, by any theoretical method, the supply and demand of seafarers, but to collect and compare objective and reliable data. This has been achieved through the methodology described hereafter.

2. METHODOLOGY

To fulfil the objective of the present study, the first step was to collect as much data as possible about seafarers' employment. This has been achieved through an extensive research and review of existing studies, statistics and documents.

Comments are developed in the next part 3, “**Supporting studies**” mainly on three international studies, including the ISF/BIMCO Manpower Study, 2010 updated, considered by the Industry as the most reliable existing worldwide material on seafarers' employment. Further comments are made on different European studies and other sources used for the present report.

Websites of national administrations of the 24 maritime countries of EU, plus Norway, were systematically consulted (landlocked countries except Luxembourg have not been included in this study), going through the Ministry of Transport's website, which exists in all countries. In some countries, a web-link exists toward a dedicated maritime administration or statistics authority.

Through these national websites, access to statistics, or annual reports, are sometimes possible. Most of the websites have an English version, in totality or in abstract. Unfortunately, some countries do not offer this facility.

Detailed national reports were found available on line for France, Denmark, France, Germany Greece and UK.

ECSA and National shipowners' association websites (no association or no website found for Ireland, Estonia, Latvia and Romania) were also visited, and annual reports extracted when on line. Very few of them give sufficient information regarding seafarers' employment. **ETF** was also approached and searches carrying out to organisations as **ILO, ITF, ISF, BIMCO, INTERTANKO, maritime universities** or other bodies with an interest in the maritime industry.

Information on national fleets was also collected, as it was imperative to have a view on number of ships registered in each country to be compared with number of seafarers. The main source of information regarding merchant fleet at international level is the **IHS-Fairplay** data, but for the scope of the study, the **ISL Bremen** data 2010 (issued from the precedent) has been used as being in a more readable form. National authorities and shipowners' associations have also figures on national fleets.

Regarding harbour fleets, the **European Tugs Association** has been consulted but has not been in a position to provide information on number of tugs in EU and related employment of seafarers.

As said above, the purpose of this study was not to engage in a new large survey on employment of seafarers in EU. However, because of the few positive results given by the existing material, a **questionnaire** was sent to every maritime administration in countries where data was insufficient or non-existent. This questionnaire is shown in **Annex E** with countries where it has been sent. The questionnaire has been voluntary limited in its form and in the number of data required in the hope to obtain answers. Direct telephone contacts with some administrations complemented the

information.

Figures have been extracted from these different sources to have a view on the situation of supply and demand of officers and ratings in Europe in the **Part 4** of the study. An attempt on very simple basis is also made to consider the need of additional seafarers for the next ten years in Europe.

Additional collated information is in the **Part 5**, regarding age structure of European seafarers, women employment, wages elements and employment in maritime clusters.

A standard form was established for each European maritime country (except Slovenia and Slovakia) showing the available information on national fleets, seafarers' employment and conditions for each country. The result constitutes the **Part 6** of the study.

3. SUPPORTING STUDIES

A - The ISF/BIMCO Study Manpower 2010 Update

The most comprehensive study about global supply of and demand for merchant seafarers is the **ISF/BIMCO Study**, produced for the first time in 1990 and regularly updated. The last update, 2010, has been made recently available and remains an excellent tool of evaluation of worldwide seafarers' employment. The study gives especially an extremely useful view on trends in the future of supply and demand of seafarers and has been certainly in these past years a motor in the decision to take actions at national level, including in Europe, to improve recruitment of cadets.

If the study gives precious information on current supply situation of officers and ratings by individual countries, trends on the demand and future situation are shown for five broad geographical groupings: OECD, Eastern & Central Europe, Africa/Latin America, Far East and Indian Sub-continent. EU is not considered as a specific area and therefore is included both in OECD and Eastern Europe. This is logic regarding the general aim of the study and this factual remark is in no manner a criticism. But it makes difficult to use the study to predict demand evolution for seafarers in EU.

If the supply of seafarers is based on a questionnaire sent to national administrations, the current and future demands are estimated through a rather sophisticated process provided by the Warwick Institute for Employment Research. It takes into account the types and size of national fleets by age-blocs, the average manning for each category of ship and back-up ratio specific to the region. The future demand includes the fleets evolution (scrapping and new building), the age profile of active seafarers, the predicted wastage and the number of new entrants. All these elements are processed globally for each of the five areas.

The 2010 update has been considerably improved, with data from more countries than in the past years and by including a broader range of vessels. On this last point however, looking at the number of vessels considered by country, and by comparison with other sources, the conclusion for Europe is that these numbers are generally underestimated. In particular, harbour tugs and small coastal vessels are probably not included while employment in these sectors is far to be neglected regarding national seafarers in some EU countries. But it is assumed that the study is worldwide oriented and can't be considered as a tool for individual country to determine its own future demand for seafarers.

Discussion with ISF and BIMCO about the possibility to extract data relating to EU countries highlighted the difficulty to isolate a group of specific countries from the global process to obtain reliable regional data at a rather small scale. Further investigation with Warwick Centre would be needed to advance on this way and obtain a cost estimation of such a project.

B - THE DREWRY Manning Report 2010

The consultant **Drewry** produces every year well known and recognised surveys on the evolutions in the shipping industry. One report is dedicated to **Manning** and has been used for the present study. Drewry estimates the worldwide demand and supply of seafarers with a method developed by **Precious Associates Limited**. The study divides the seagoing workforce in four great geographical areas: West Europe, East Europe, Far East/India and Others. As the scope of each group is not necessary the same as the ISF/BIMCO groupings, cross comparisons have been made in the present report to obtain a view on the situation in Europe. The size of the world fleet estimated by in the two studies is broadly the same with 57 000 ships for ISF/BIMCO and 54 800 for Drewry.

Globally, Drewry estimates a bigger worldwide shortage of officers than ISF/BIMCO, in 2010, but projection on the supply/demand figures for 2014 shows less shortage than ISF/BIMCO 2015 predict. Both studies estimate worldwide availability of ratings in balance or exceeding the demand.

The Drewry study contains nine countries reports with detailed information on employment conditions, including wages, leave rate and voyage. These reports include four European countries: Latvia, Poland, Romania and UK.

C - THE JAPANESE INSTITUTE OF TRANSPORT STUDY 2010

In May 2010, the **Japan International Transport Institute and The Nippon Foundation** produced a study on the “Future Global Supply and Demand for Seafarers and Possible Measures to Facilitate Stakeholders to Secure a Quantity of Quality Seafarers”.

Based on a 2010 worldwide number of ships of 35 623 (counting only ships of GT2000 and over) and using manning scales by type of ships, the study estimates a demand for officers and ratings in 2010 and projects the demand in 2020, taking into account a number of economic and manning factors. The study concludes that some 32 000 additional officers and 47 000 ratings would be needed to man the projected fleet in 2020. The study doesn't give indication on the current and future supply of seafarers.

D - EUROPEAN STUDIES, OTHER STUDIES AND DOCUMENTATION

Several studies on seafarers' employment were carried out in the European Union in a more or less recent past:

- A first attempt to estimate the gap between the supply and the demand in OECD countries was made in a study for this organisation in 2003 by **Precious Associates Limited (UK)** (“Availability and training of seafarers”). The study contains useful information on seafarers' employment in OECD countries and projections includes a large part of technical evolution of the ships in the future. However, figures used date from ten years and the scope of the study remains too large to reflect the current situation in European Union's Member States.
- In 2005, in the scope of the 6th Framework Program of the Maritime Transport Coordination Platform, the **World Maritime University** produced a Study on the Supply & Demand of EU Officers/ Ratings and Manning, but without definitive conclusion, due to a limited time and mainly to “*a lack of uniform seafarer data maintained by the Member States*”.

- In 2006 the consultant **ECOTEC** (UK)* produced for the DG Fisheries and Maritime Affairs an important study on employment in sea related sectors (“An exhaustive analysis of employment trends in all sectors related to sea or using sea resources”). The present study refers to this analysis for the employment in the Maritime clusters.
- In 2007 the consultant **ECORYS** (NL)* produced for the DG-TREN a study on the impact assessment of the entry into force of the ILO MLC with some consideration on manning (“Impact Assessment on the entry into force of the ILO maritime labour standards consolidated Convention”).
- In 2009, the European Parliament produced a report (**Buck Consultant -B-** and others) on the shortage of qualified personnel in maritime and inland waterway transports. This study was itself a compilation of existing data and highlighted the great difficulty to obtain reliable information regarding seafarers' employment (“The lack of centralised and harmonised data collection poses problems. In fact, all data regarding current employment in the maritime industry and the additional number of seafarers required in the coming years are based on either incomplete or fragmented data” P. 28).
- In 2009, **ECORYS** produced for the DG Energy and Transport (Directorate G – Maritime transport) a comprehensive study on “The labour market and employment conditions in Intra-Community regular maritime transport services carried out by ships under Member States' or Third Countries' flags”. This study contains much information on employment in Intra-EU traffics, social security, crew costs and supply/demand of seafarers. The study has been used as a reference for the section on Intra-EU employment in the present report.
- More recently, **ETF** has undertaken statistical researches on seafarers for selected countries to be used in the scope of the ETF Workshop “Seafarers Recruitment and training in Europe” (Nathan Lillie, Groningen University, 2010). These countries are: Germany, Greece, Norway, Poland and UK. Information from these studies has also been used in this report.
- Mention is made when necessary of other consulted studies.

**ECOTEC and ECORYS joined in 2010 under the name ECORYS*

4. NUMBERS OF SEAFARERS

4.1 NUMBERS OF OFFICERS AND RATINGS IN THE EU IN 2010

The estimated number of active seafarers in maritime EU Member States in 2010, plus Norway, (as extracted from ISF/BIMCO Manpower up-date study 2010) are **143 967** officers and **110 152** ratings, for a total of **254 119** seafarers.

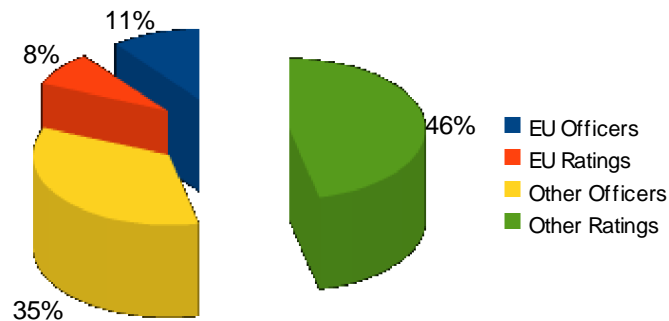
N°	COUNTRY	ISF/BIMCO 2010			Number of ships
		<i>Estimated supply 2010</i>			
		OFFICERS	RATINGS	TOTAL	
1	BELGIUM	498	92	590	99
2	BULGARIA	10 890	22 379	33 269	67
3	CYPRUS	2 907	514	3 421	855
4	DENMARK	2 762	1 176	3 938	409
5	ESTONIA	2 700	6 300	9 000	35
6	FINLAND	3 000	1 200	4 200	176
7	FRANCE	4 568	9 128	13 696	299
8	GERMANY	3 997	6 256	10 253	663
9	GREECE	9 993	2 970	12 963	1305
10	IRISH REPUBLIC	1 510	1 602	3 112	49
11	ITALY	9 560	11 390	20 950	990
12	LATVIA	5 509	2 383	7 892	33
13	LITHUANIA	2 916	2 479	5 395	58
14	LUXEMBOURG	2 272	2 164	4 436	106
15	MALTA	274	2 162	2 436	1552
16	NETHERLANDS	3 014	560	3 574	827
17	NORWAY	16 082	7 300	23 382	1381
18	POLAND	17 923	4 746	22 669	72
19	PORTUGAL	419	1 802	2 221	64
20	ROMANIA	18 575	5 768	24 343	34
21	SLOVAKIA	258	318	576	0
22	SLOVENIA	544	100	644	0
23	SPAIN	3 181	3 862	7 043	116
24	SWEDEN	5 958	4 965	10 923	356
25	UK	14 657	8 536	23 193	944
	TOTAL	143 967	110 152	254 119	10 490

Source: ISF/BIMCO 2010

On a global supply estimated worldwide at **1 371 000** seafarers,
EU plus Norway represents about **18,50%** of the total workforce,
23% of the **officers** and near **15%** of the **ratings**.

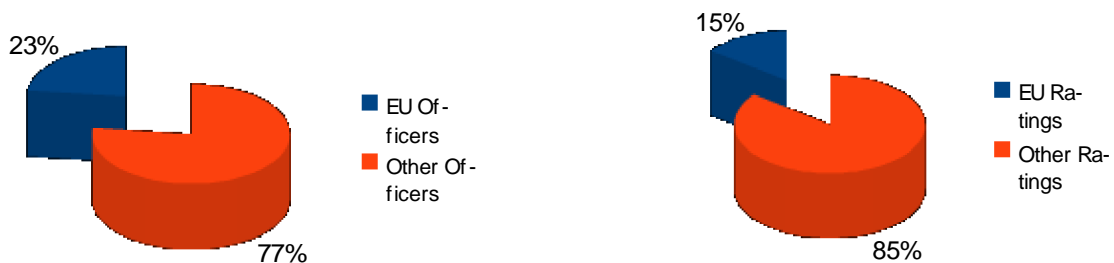
The **total worldwide workforce** is shared between EU and Norwegian seafarers and seafarers of the rest of the world as follows:

Source: ISF/BIMCO 2010



Source: ISF/BIMCO 2010

Numbers of **EU officers and EU Ratings** (plus Norway) on the **worldwide total** Of officers and ratings:



Source: ISF/BIMCO 2010

In 2010, European seafarers are supposed to man a total of about **10 490 ships** registered in EU Members States (plus Norway), as estimated by ISF/BIMCO, but up to **14 770** as shown in **ECSA** annual report 2010.

Detailed Data on EU Fleets are shown in Annexes A to D

ISF/BIMCO notes that method to estimate the number of ships has been improved since 2005, in order to take a better account of smaller ships. However, when looking at figures on number of ships under European flags from other sources, as national authorities, shipowners' associations or ECSA, ISF/BIMCO figures seems underestimated.

Differences in estimated supply figures

Depending on the source, **significant differences** are observed in the number of national seafarers. The table below gives a comparison between ISF/BIMCO 2010 figures and estimation in Drewry's Annual report on Manning 2010/2011, for 11 countries detailed by the latter.

	Estimated supply			Estimated supply		
	OFFICERS	RATINGS	TOTAL	OFFICERS	RATINGS	TOTAL
BULGARIA	10 890	22 379	33 269	3 000	3 500	6 500
DENMARK	2 762	1 176	3 938	5 200	2 000	7 000
GREECE	9 993	2 970	12 963	17 000	15 000	32 000
GERMANY	3 997	6 356	10 353	6 700	3 000	9 700
LATVIA	5 509	2 383	7 892	6 000	9 000	15 000
NETHERLANDS	3 014	560	3 574	3 600	900	4 500
POLAND	17 923	4 746	22 669	20 000	10 000	30 000
ROMANIA	18 575	5 768	24 343	9 000	6 200	15 200
SWEDEN	5 958	4 965	10 923	5 000	8 000	13 000
SPAIN	3 181	3 862	7 043	4 600	5 500	10 100
UK	14 657	8 536	23 193	15 400	5 000	20 400
TOTAL	96 459	63 701	160 160	95 500	68 100	163 400

Source : ISF/BIMCO 2010 & Drewry 2010

**Although totals are broadly the same in both studies,
important differences appear by countries.**

Information collated **for the present study** are shown by individual countries in the next table, showing a comparison between ISF/BIMCO data and data from other sources when they exist. Higher figures from other sources have been systematically noted.

	ISF/BIMCO			Other sources			
	OFFICERS	RATINGS	TOTAL	OFFICERS	RATINGS	TOTAL	
BELGIUM	498	92	590			0	
BULGARIA	10 890	22 379	33 269			0	
CYPRUS	2 907	514	3 421			0	
DENMARK	2 762	1 176	3 938	2 896	1 882	4 778	<i>DMA 2010</i>
ESTONIA	2 700	6 300	9 000			0	
GERMANY	3 997	6 356	10 353	4 066	2 701	6 767	<i>FlottenKommando 2010</i>
GREECE	9 993	2 970	12 963	6 821	8 028	14 849	<i>Nat. stat. 2006</i>
FINLAND	3 000	1 200	4 200			0	
FRANCE	4 568	9 128	13 696	3 642	6 234	9 876	<i>Observ. 2009</i>
IRISH REPUBLIC	1 510	1 602	3 112			0	
ITALY	9 560	11 390	20 950			21 700	<i>Confitarma 2010</i>
LATVIA	5 509	2 383	7 892	5 509	6 273	11 782	<i>SKEMA 2010</i>
LITHUANIA	2 916	2 479	5 395	3 083	3 584	6 667	<i>Lithuanian MSA 2011</i>
LUXEMBOURG	2 272	2 164	4 436			0	
MALTA	274	2 162	2 436			0	
NEIHERLANDS	3 014	560	3 574	1 700	530	2 230	<i>Nederlandse cluster 2010</i>
NORWAY	16 082	7 300	23 382				
POLAND	17 923	4 746	22 669			40 000	<i>Minst. Transport 2011</i>
PORTUGAL	419	1 802	2 221			0	
ROMANIA	18 575	5 768	24 343	21 391	9 291	30 682	<i>Minst. Transport 2011</i>
SWEDEN	5 958	4 965	10 923	3 324	4 340	7 664	<i>Swed stat Bureau 2010</i>
SLOVENIA	544	100	644			0	
SLOVAKIA	258	318	576			0	
SPAIN	3 181	3 862	7 043			0	
UK	14 657	8 536	23 193	14 620	11 340	25 960	<i>UK dept Transport 2010</i>
TOTAL	143 967	110 252	254 219				

Source: ISF/BIMCO 2010 & Other

Some figures are rather consistent between the two sources, **other are questionable** (number of German ratings, number of Dutch officers, number of Latvian ratings, number of Swedish officers, number of British ratings and total number of Polish and Norwegian seafarers).

For France, figures are from the Seafarers' Observatory Survey 2008/9 and are supposed to cover about 80% of the total of French seafarers, which is coherent with ISF/BIMCO figures.

In **2009**, in the study on the labour market and employment conditions in Intra-Community regular maritime transport services, **ECORYS** gives an estimation by country of the supply (and demand) of officers and ratings in Europe. The supply figures of this study are shown in the table next page, compared with the last ISF/BIMCO estimation (EU plus Norway).

COUNTRY	ISF BIMCO			ECORYS		
	<i>Estimated supply 2010</i>			<i>Estimated supply 2008</i>		
	OFFICERS	RATINGS	TOTAL	OFFICERS	RATINGS	TOTAL
BELGIUM	498	92	590	13879	7118	20997
BULGARIA	10890	22379	33269	7812	5363	13175
CYPRUS	2907	514	3421	na	701	59
DENMARK	2762	1176	3938	7432	10812	18244
ESTONIA	2700	6300	9000	7167	0	7167
FINLAND	3000	1200	4200	738	458	1196
FRANCE	4568	9128	13696	15285	13958	29243
GERMANY	3997	6256	10253	8552	0	8552
GREECE	9993	2970	12963	14524	4430	18954
IRELAND	1510	1602	3112	na	na	0
ITALY	9560	11390	20950	13369	3041	16410
LATVIA	5509	2383	7892	7065	8695	15760
LITHUANIA	2916	2479	5395	2927	2755	5682
LUXEMBOURG	2272	2164	4436	0	0	0
MALTA	274	2162	2436	67	64	131
NETHERLANDS	3014	560	3574	17722	5575	23297
NORWAY	16082	7300	23382	na	na	0
POLAND	17923	4746	22669	13436	6891	20327
PORTUGAL	419	1802	2221	1000	4000	5000
ROMANIA	18575	5768	24343	12746	12807	25553
SLOVAKIA	258	318	576	na	na	0
SLOVENIA	544	100	644	623	820	1443
SPAIN	3181	3862	7043	15842	10840	26682
SWEDEN	5958	4965	10923	7498	2378	9876
UK	14657	8536	23193	28439	na	28439
TOTAL	143967	110152	254119	196123	100706	296187

ECORYS indicates that figures were provided by national authorities in most cases, or calculated by aggregating the number of certificates issued in the past five years (including renewals). This method probably explains the huge differences that can be noted for some countries between ISF/BIMCO and ECORYS figures and results of the latter are certainly over estimated regarding the real number of available seafarers.

4.2 COMPARATIVE SITUATION BETWEEN WEST AND EAST EUROPE

Although European Union is an entity for employment, there is a strong imbalance of situation for seafarers between Western and Eastern Member States. From ISF/BIMCO data, the total number of seafarers in Western Europe countries (EU plus Norway) is **146 231 (81 652 officers and 64 579 ratings)** and the number from East Europe **107 988 (62 315 officers and 45 673 ratings)**. These figures are to be compared to the total number of ships as determined by ISF/BIMCO: **9 025** registered in West Europe and only **388** in East Europe.

The following table shows the number of officers and ratings in EU (plus Norway) separated for West an East Europe, with an additional part including other OECD and Eastern Europe countries as selected by ISF/BIMCO. Size in number of national fleets as in the ISF/BIMCO study is reported for each country.

WEST EUROPE	OFFICERS	RATINGS	TOTAL	FLEET	EAST EUROPE	OFFICERS	RATINGS	TO TAL	FLEET
BELGIUM	498	92	590	99				0	
			0		BULGARIA	10 890	22 379	33 269	67
CYPRUS	2 907	514	3 421	855				0	
DENMARK	2 762	1 176	3 938	409				0	
			0		ESTONIA	2 700	6 300	9 000	35
			0		FINLAND	3 000	1 200	4 200	176
FRANCE	4 568	9 128	13 696	299				0	
GERMANY	3 997	6 356	10 353	663				0	
GREECE	9 993	2 970	12 963	1 305				0	
IRSIH REP	1 510	1 602	3 112	49				0	
ITALY	9 560	11 390	20 950	990				0	
			0		LATVIA	5 509	2 383	7 892	33
			0		LITHUANIA	2 916	2 479	5 395	58
LUXEMBOURG	2 272	2 164	4 436	106				0	
MALTA	274	2 162	2 436	1 552				0	
NETHERLANDS	3 014	560	3 574	827				0	
NORWAY	16 082	7 300	23 382	1 181				0	
			0		POLAND	17 923	4 746	22 669	72
PORTUGAL	419	1 802	2 221	64				0	
			0		ROMANIA	18 575	5 768	24 343	34
			0		SLOVAKIA	258	318	576	0
			0		SLOVENIA	544	100	644	0
SPAIN	3 181	3 862	7 043	116				0	
SWEDEN	5 958	4 965	10 923	356				0	
UK	14 657	8 536	23 193	944				0	
TOTAL EU	81 652	64 579	146 231	9 815		62 315	45 673	107 988	475
OTHER OECD Countries					OTHER EAST EUROPE COUNTRIES				
AUSTRALIA	4 760	3 500	8 260	203	UKRAINE	27 172	11 000	38 172	297
CANADA	13 994	3 109	17 103	356	CROATIA	11 704	6 954	18 658	194
JAPAN	21 297	7 308	28 605	3 874	RUSSIA	25 000	40 000	65 000	1511
NEW ZELAND	600	900	1 500	53					
USA	21 810	16 644	38 454	722					
TURKEY	36 734	51 009	87 743	1 075					
TOTAL OTHER	99 195	82 470	181 665	6 283		63 876	57 954	121 830	2002
GEN TOTAL	180 847	147 049	327 896	16 098		126 191	103 627	229 818	2477

Source: ISF/BIMCO 2010

It must be noted that the OECD countries grouping by ISF/BIMCO doesn't reflect the reality of this Organization, as some Member countries are included in the Eastern Europe group (Finland, Poland, Slovakia, Slovenia – and Estonia which became a Member at the end of 2010). To keep harmonised reference, ISF/BIMCO grouping has been used in this study.

In OECD and Eastern Europe countries, the workforce sharing of officers and ratings citizens of EU Member States (plus Norway) and other countries of these two parts of the world is as follows:

% Share OECD				% Share E Europe			
EU	45,15	43,92	44,6	EU	49,38	44,07	46,99
OTHER	54,85	56,08	55,4	OTHER	50,62	55,93	53,01
TOTAL	100	100	100	TOTAL	100	100	100

Source: ISF/BIMCO 2010

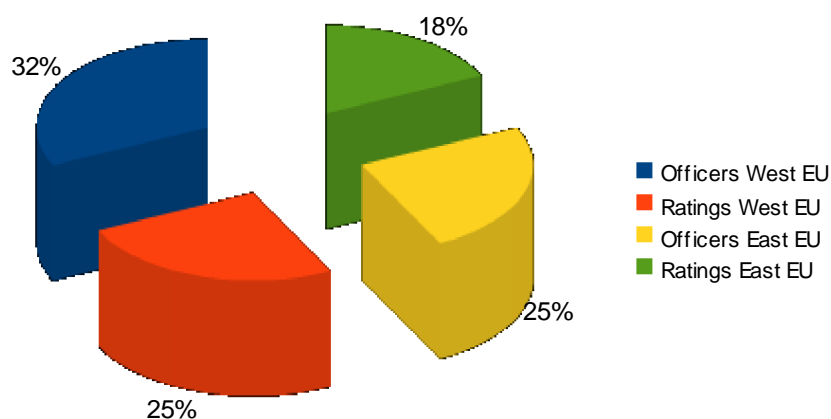
44,6% of the total of OECD seafarers are European Citizens (EU plus Norway), of which **45,15%** are officers and **43,92%** are ratings.

Inside European Union, the distribution between Western Europe (plus Norway) and Eastern Europe seafarers is as follows (in total and percentage):

	OFFICERS		RATINGS		TOTAL	
TOTAL EU W	81 652	56,72	64 579	58,57	146 231	57,52
TOTAL EU E	62 315	43,28	45 673	41,43	107 988	42,48
TOTAL	143 967	100	110 252	100	254 219	100

Source: ISF/BIMCO 2010

Finally, the **general distribution** of officers and ratings **inside EU** (plus Norway) is as follows:



Source: ISF/BIMCO 2010

4.3 NUMBER AND PERCENTAGE OF OFFICERS AND RATINGS BY COUNTRY

The two tables below give the distribution by country of the total number of EU and Norwegian officers and ratings:

COUNTRY	OFFICERS	%
ROMANIA	18 575	12,90
POLAND	17 923	12,45
NORWAY	16 082	11,17
UK	14 657	10,18
BULGARIA	10 890	7,56
GREECE	9 993	6,94
ITALY	9 560	6,64
SWEDEN	5 958	4,14
LATVIA	5 509	3,83
FRANCE	4 568	3,17
GERMANY	3 997	2,78
SPAIN	3 181	2,21
NETHERLANDS	3 014	2,09
FINLAND	3 000	2,08
LITHUANIA	2 916	2,03
CYPRUS	2 907	2,02
DENMARK	2 762	1,92
ESTONIA	2 700	1,88
LUXEMBOURG	2 272	1,58
IRLAND	1 510	1,05
SLOVENIA	544	0,38
BELGIUM	498	0,35
PORTUGAL	419	0,29
MALTA	274	0,19
SLOVAKIA	258	0,18
TOTAL	143 967	100

COUNTRY	RATINGS	%
BULGARIA	22 379	20,32
ITALY	11 390	10,34
FRANCE	9 128	8,29
UK	8 536	7,75
NORWAY	7 300	6,63
ESTONIA	6 300	5,72
GERMANY	6 256	5,68
ROMANIA	5 768	5,24
SWEDEN	4 965	4,51
POLAND	4 746	4,31
SPAIN	3 862	3,51
GREECE	2 970	2,70
LITHUANIA	2 479	2,25
LATVIA	2 383	2,16
LUXEMBOURG	2 164	1,96
MALTA	2 162	1,96
PORTUGAL	1 802	1,64
IRLAND	1 602	1,45
FINLAND	1 200	1,09
DENMARK	1 176	1,07
NETHERLANDS	560	0,51
CYPRUS	514	0,47
SLOVAKIA	318	0,29
SLOVENIA	100	0,09
BELGIUM	92	0,08
TOTAL	110 152	100

Source: ISF/BIMCO 2010

Western Europe countries, as other OECD countries, remain in 2010 an important source of seafarers, when **East Europe** has significantly increased officers numbers during these past years.

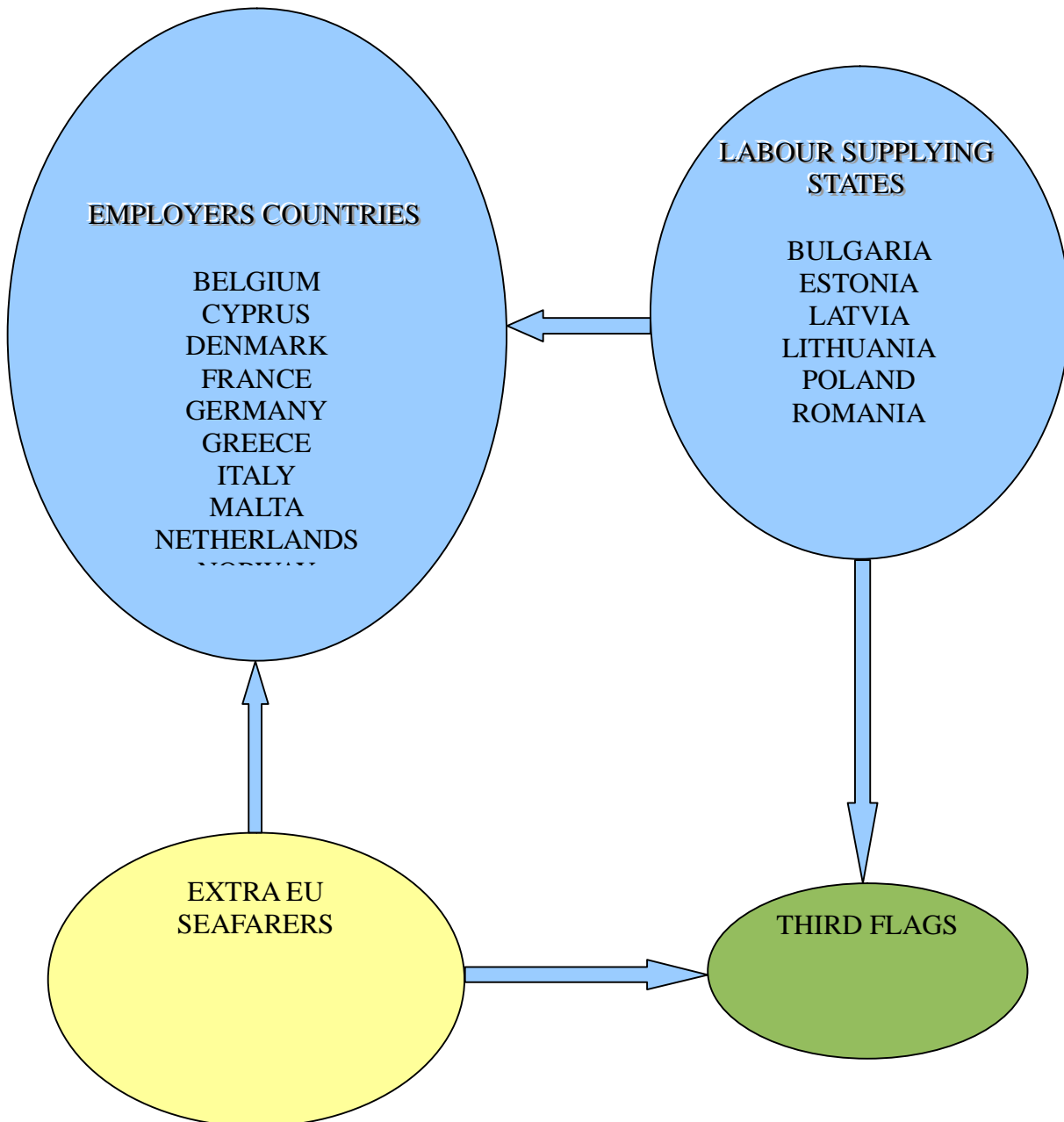
However, **information on cross employment** of European seafarers on EU ships registered under an other flag than national flag, is in practice non-existent, except in the ECORYS 2009 study for Intra-community traffics. Such situations are certainly limited in West Europe, but employment of Eastern seafarers, (mainly from Bulgaria, Poland and Romania for a near total of 50 000 officers and 33 000 ratings - probably underestimated figures), both on Western Europe ships and on ships under third flag, makes difficult to have a solid approach of global employment of EU seafarers in the Union. More details are given for Intra EU traffics.

4.4 NUMBER OF EU SEAFARERS ON EU SHIPS

When crossing individual size of national fleets with number of seafarers in each European country, a general seafarers' manpower circulation scheme can be deduced as shown here after. It takes into account that European supplying countries may have also nationals seafarers employed under third flag and that European employers countries also use extra EU seafarers manning resources.

The scheme below is an attempt to have a better view of cross employment of European seafarers in EU, in the absence of detailed statistics provided by individual countries.

Finland, Irish Republic, Spain are not considered as employers nor suppliers in this scheme.



This very simplified scheme doesn't reflect specific cases where EU seafarers can be employed on third flags ships, often at management level.

The **ECORYS 2009** study on the labour market and employment conditions in Intra-community regular maritime transport services gives for each EEA country the **percentage of national officers and ratings employed on ships flying the national flag**, based on the total demand for that flag

The table below is extracted from this study for the EU countries, plus Norway. It confirms the situation of employment of foreign seafarers in most of Western countries.

% of national officers and ratings on ships flying the national flag:

COUNTRY	% OF NATIONALS		
	OFFICERS	RATINGS	TOTAL
BULGARIA	100	100	100
POLAND	99	100	100
ROMANIA	100	100	100
FINLAND	98	95	96
SPAIN	98	81	87
FRANCE	88	81	82
LITHUANIA	96	69	80
ITALY	99	66	79
ESTONIA	35	87	78
SWEDEN	88	72	77
LATVIA	56	74	69
GREECE	92	55	67
UK			67
GERMANY	74	55	63
DENMARK	77	42	56
NETHERLANDS	53	7	27
PORTUGAL	21	24	27
BELGIUM	15	3	8
LUXEMBOURG	0	0	0
MALTA	0	0	0
CYPRUS			na
IRELAND			na
NORWAY			na

Source: ECORYS 2009

Because of employment policy by shipping companies, it is not clear if the resort to foreign seafarers is due to shortage of nationals or chosen for economic reasons. However, ECORYS notes that most of the companies consulted for the study in 2008 indicated **a shortage of nationals**, and that **overall surplus can co-exist with local shortage**.

The legal situation has also to be considered in the different countries regarding employment of non-EU seafarers under national flag, although second registers, where this option is always opened, are included as full national flag in the present study. The second part of the ECORYS 2009 study gives indications of legal regime regarding employment of non EU seafarers on national EU flags.

The next table shows for the countries of **West Europe** (EU Member States plus Norway), where the data is available, the number of national seafarers and the number of **EU and non EU** seafarers employed under national flag in 2010. It is supposed that the national seafarers are employed broadly under national flag (as far as these countries are not supplying countries and as the number of seafarers employed on controlled ships is considered as no significant).

Data on foreign seafarers was collected for the present study.

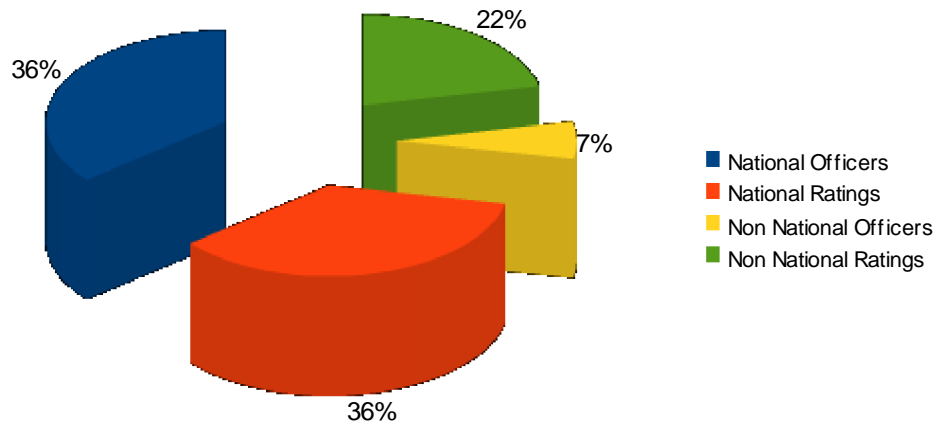
COUNTRY	Nationals			EU			Non EU			Total Non Nationals		
	OFFICERS	RATINGS	TOTAL	OFFICERS	RATINGS	TOTAL	OFFICERS	RATINGS	TOTAL	OFFICERS	RATINGS	TOTAL
BELGIUM												
CYPRUS												
DENMARK	2896	1882	4878	314	596	910	979	2844	3823	1293	3440	4733
FINLAND												
FRANCE	3642	6234	9876	665	1458	2123	261	1436	1697	926	2894	3820
GERMANY	4066	2701	6767							2512	5376	7528
GREECE	6821	8028	14849							511	6166	6677
IRLAND												
ITALY	9560	11300	20950			250			13690			13940
LUXEMBOURG												
MALTA												
NEIHERLANDS	1700	530	2230	980	340	1320	1750	7850	9600	2730	8190	10920
NORWAY	6922	10694	17616							2109	2277	4386
PORTUGAL												
SPAIN												
SWEDEN	3324	4340	7764							638	1818	2456
UK	14620	11340	25960			5265			7298			12563
TOTAL	53551	57049	110890	1959	2394	9868	2990	12130	36108	10719	30161	67023

In these **9** countries, the total number of employed seafarers is about **178 000** of which **111 000 (62,3%) are nationals and 67 000 (37,7 %) non nationals (EU and non EU).**

For the five countries where distinction is made between foreign EU and non EU seafarers, the table shows a total of 109 800, of which

63 900 (58%) are nationals, 9870 (9%) EU seafarers and 36 110 (33%) non EU

On the total of **155 900** seafarers, the distribution between National and Non nationals is as shown below:



4.5 PAST EVOLUTION IN NUMBERS OF EU SEAFARERS

The next table shows the evolution in numbers of officers and ratings by country, based on a comparison between ISF/BIMCO 2000 and 2010 manpower studies (EU plus Norway).

COUNTRY									
	2010	2000	Diff	2010	2000	Diff	2010	2000	Diff
	OFFICERS			RATINGS			TOTAL		
BELGIUM	498	546	-48	92	133	-41	590	679	-89
BULGARIA	10 890	2 075	8 815	22 379	3 072	19 307	33 269	5 147	28 122
CYPRUS	2 907	50	2 857	514	1 950	-1 436	3 421	2 000	1 421
DENMARK	2 762	5 353	-2 591	1 176	4 522	-3 346	3 938	9 875	-5 937
ESTONIA	2 700	2 152	548	6 300	7 000	-700	9 000	9 152	-152
GERMANY	3 997	6 021	-2 024	6 356	8 462	-2 106	10 353	14 483	-4 130
GREECE	9 993	17 000	-7 007	2 970	15 500	-12 530	12 963	32 500	-19 537
FINLAND	3 000	4 000	-1 000	1 200	6 000	-4 800	4 200	10 000	-5 800
FRANCE	4 568	2 833	1 735	9 128	6 595	2 533	13 696	9 428	4 268
IRISH REPUBLIC	1 510	1 452	58	1 602	2 089	-487	3 112	3 541	-429
ITALY	9 560	9 500	60	11 390	14 000	-2 610	20 950	23 500	-2 550
LATVIA	5 509	6 170	-661	2 383	8 135	-5 752	7 892	14 305	-6 413
LUXEMBOURG	2 272	514	1 758	2 164	465	1 699	4 436	979	3 457
NETHERLANDS	3 014	2 707	307	560	5 937	-5 377	3 574	8 644	-5 070
NORWAY	16 082	12 000	4 082	7 300	10 200	-2 900	23 382	22 200	1 182
POLAND	17 923	5 944	11 979	4 746	6 162	-1 416	22 669	12 106	10 563
PORTUGAL	419	419	0	1 802	1 802	0	2 221	2 221	0
ROMANIA	18 575	4 794	13 781	5 768	5 763	5	24 343	10 557	13 786
SWEDEN	5 958	4 500	1 458	4 965	5 100	-135	10 923	9 600	1 323
SLOVENIA	544	140	404	100	185	-85	644	325	319
SLOVAKIA	258	37	221	318	68	250	576	105	471
SPAIN	3 181	4 000	-819	3 862	6 000	-2 138	7 043	10 000	-2 957
UK	14 657	13 285	1 372	8 536	10 860	-2 324	23 193	24 145	-952
			0						
TOTAL	140 777	105 492	35 285	105 611	130 000	-24 389	246 388	235 492	10 896

Source: ISF/BIMCO 2000/2010

Note: Two countries (Malta and Lithuania) were not listed in 2000 and have been withdrawn from this table. Portugal shows the same figures in 2000 and 2010.

Direct comparisons of figures from ISF/BIMCO manpower study 2000 and 2010 must be considered with great caution, as changes in sources or counting methodology may have occurred for some countries during this period.

Even considering that differences between 2000 and 2010 may not be fully reliable, the table gives a trend **in the manpower changing** in EU during this period.

The next table shows these changes in percentage (EU plus Norway):

COUNTRY	OFFICERS	RATINGS	TOTAL
BELGIUM	-8,79%	-30,83%	-13,11%
BULGARIA	424,82%	628,48%	546,38%
CYPRUS	5714,00%	-73,64%	71,05%
DENMARK	-48,40%	-73,99%	-60,12%
ESTONIA	25,46%	-10,00%	-1,66%
GERMANY	-33,62%	-24,89%	-28,52%
GREECE	-41,22%	-80,84%	-60,11%
FINLAND	-25,00%	-80,00%	-58,00%
FRANCE	61,24%	38,41%	45,27%
IRISH REPUBLIC	3,99%	-23,31%	-12,12%
ITALY	0,63%	-18,64%	-10,85%
LATVIA	-10,71%	-70,71%	-44,83%
LUXEMBOURG	342,02%	365,38%	353,12%
NEIHERLANDS	11,34%	-90,57%	-58,65%
NORWAY	34,02%	-28,43%	5,32%
POLAND	201,53%	-22,98%	87,25%
PORTUGAL	0,00%	0,00%	0,00%
ROMANIA	287,46%	0,09%	130,59%
SWEDEN	32,40%	-2,65%	13,78%
SLOVENIA	288,57%	-45,95%	98,15%
SLOVAKIA	597,30%	367,65%	448,57%
SPAIN	-20,48%	-35,63%	-29,57%
UK	10,33%	-21,40%	-3,94%
TOTAL	33,45%	-18,76%	4,63%

Source: ISF/BIMCO 2000/2010

Note: The spectacular increase of Cypriots officers is probably due to a severe underestimated number in 2000 (50)

If the total number of European seafarers remained more or less the same during these past ten years, showing a slight increasing of about 4,5%,
the number of officers increased of about one third,
when ratings lost near 20% of jobs.

Again, a **separate view** of respective situations in **Western and Eastern** parts of the Union is necessary to have a better assessment of these changes (*EU plus Norway; Finland incorporated in West Europe*):

COUNTRY	West Europe		
	OFFICERS	RATINGS	TOTAL
BELGIUM	-8,79%	-30,83%	-13,11%
CYPRUS	5714,00%	-73,64%	71,05%
DENMARK	-48,40%	-73,99%	-60,12%
GERMANY	-33,62%	-24,89%	-28,52%
GREECE	-41,22%	-80,84%	-60,11%
FINLAND	-25,00%	-80,00%	-58,00%
FRANCE	61,24%	38,41%	45,27%
IRISH REPUBLIC	3,99%	-23,31%	-12,12%
ITALY	0,63%	-18,64%	-10,85%
LUXEMBOURG	342,02%	365,38%	353,12%
NEIHERLANDS	11,34%	-90,57%	-58,65%
NORWAY	34,02%	-28,43%	5,32%
PORTUGAL	0,00%	0,00%	0,00%
SWEDEN	32,40%	-2,65%	13,78%
SPAIN	-20,48%	-35,63%	-29,57%
UK	10,33%	-21,40%	-3,94%
TOTAL	0,24%	-36,14%	-19,48%

COUNTRY	East Europe		
	OFFICERS	RATINGS	TOTAL
BULGARIA	424,82%	628,48%	546,38%
ESTONIA	25,46%	-10,00%	-1,66%
LATVIA	-10,71%	-70,71%	-44,83%
POLAND	201,53%	-22,98%	87,25%
ROMANIA	287,46%	0,09%	130,59%
SLOVENIA	288,57%	-45,95%	98,15%
SLOVAKIA	597,30%	367,65%	448,57%
TOTAL	164,63%	38,21%	90,33%

Source: ISF/BIMCO 2000/2010

If the total number of officers has broadly remained the same as ten years ago in **Western Europe**, some countries have **lost a significant number of officers** and **number of ratings has decreased** in most countries.

Number of officers

During the same period, number of **Eastern European officers** increased, notably in Bulgaria, Poland and Romania, where a clear trend of decreasing of ratings may be seen. (*Slovenia and Slovakia show huge increase of officers and rating for the latter, but absolute numbers of seafarers for these two countries remain very low*)

In **Western countries**, the comparison makes sense only when looking at the fleet change under national flag on the same period.

As **ISF/BIMCO 2000** doesn't give the number of ships by country, the next table is based on the UNCTAD Fleets tables 2000 and 2010 (Ships of GT 1000 and over).

(*EU plus Norway; some countries are not mentioned in the UNCTAD tables 2000 and/or 2010*)

COUNTRY	2000		2010	
	Fleet	Number	Fleet	Number
BELGIUM	24	546	85	498
CYPRUS	na	50	129	2 907
DENMARK	418	5 353	360	2 762
GERMANY	498	6 021	458	3 997
GREECE	752	17 000	741	9 993
FINLAND	na	4 000	na	3 000
FRANCE	177	2 833	180	4 568
IRISH REPUBLIC	na	1 452	na	1 510
ITALY	489	9 500	608	9 560
LUXEMBOURG	na	514	na	2 272
NETHERLANDS	548	2 707	528	3 014
NORWAY	905	12 000	820	16 082
PORTUGAL	na	419	na	419
SWEDEN	174	4 500	136	5 958
SPAIN	33	4 000	173	3 181
UK	405	13 285	357	14 657
TOTAL		84 180		84 378

Source: UNCTAD 2000 & 2010

These figures must be considered with great caution, as high uncertainties remain on the adjustment between number of ships and number of officers. Notably, number of ships from UNCTAD tables (compiled on the basis of Lloyd's Maritime Information Services in 2000 and IHS-Fairplay in 2010) takes into account ships only of GT 1000 and over, when number of seafarers as determined by ISF/BIMCO and collated from national administrations are supposed to include all active officers in the country.

The next table shows the difficulty to conclude final trends about officers employment during these past years without a deeper knowledge of national fleets changes, notably to take into account national coastal navigation or growing maritime activities, as oil or wind offshore fields.

In the six big maritime countries where merchant fleet has decreased during the ten past years, the number of officers has decreased in three of them and increased in the three others.

COUNTRY	Decreasing fleet	Diff Officers
DENMARK	-58	-2591
GERMANY	-40	-2024
GREECE	-11	-7007
NORWAY	-85	4082
SWEDEN	-38	1458
UK	-48	1372

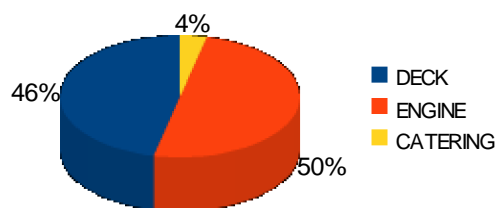
4.6 NUMBER OF OFFICERS AND RATINGS BY DEPARTMENT

Few data are available about seafarers' number details by departments on board.

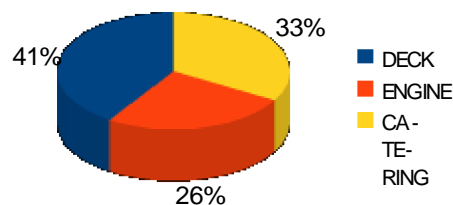
9 countries* provide this information in the national statistics. The table and graphs below are the result of a compilation of the national data collated for this study and gives an idea of this distribution:

	NATIONALS			TOTAL
%	DECK	ENGINE	CATERING	
OFFICERS	43,97	47,31	3,46	57,43
RATINGS	40,56	25,92	33,16	42,57

Officers



Ratings



ISF/BIMCO study 2010 also shows the evolution of ranks' distribution between 1995 and 2010, for the five geographical areas of the survey. The two next tables give this sharing up for officers in OECD and East & Central Europe:

(Percentage is of the world total workforce).

**Bulgaria, Germany, Greece, Latvia, Lithuania, Romania, Sweden, UK, plus Norway.*

OECD

Level	Deck		Engine		Other
	Management	Operational	Management	Operational	
	%	%	%	%	%
1995	54,40	32,40	51,40	33,00	35,60
2000	48,80	26,90	44,20	26,00	30,30
2005	27,50	15,30	25,60	15,20	35,30
2010	12,20	7,70	10,10	7,40	6,60

Source: ISF/BIMCO 2010

East & Central Europe

Level	Deck		Engine		Other
	Management	Operational	Management	Operational	
	%	%	%	%	%
1995	14,70	14,20	14,50	16,00	20,70
2000	16,40	15,30	18,30	15,50	15,50
2005	36,60	25,20	38,00	25,80	14,70

Source: ISF/BIMCO 2010

These figures clearly confirm the **strong decline** of numbers of officers from **developed countries** during the past years in the total of active officers in the world. This decline has been compensated by an increasing number of officers from Eastern countries, partly European and largely from far East.

4.7 EMPLOYMENT OF EU AND NON EU SEAFARERS ON INTRA-EU TRAFFICS

4.7.1 Number of seafarers

The European Union, regarded as an entity for employment is certainly a unique situation in the world, where Intra-EU sea traffics creates a very specific situation about seafarers' employment. This situation has a strong impact on employment of national seafarers, when international studies are more oriented on worldwide exchanges, without consideration of regional and local traffics.

If numerous data are published about tonnage traffics and ports activities, information on seafarers working on ships engaged in Intra-EU voyages are rare at national levels. In this context, the **ECORYS (2009) study on the labour market and employment conditions in intra community regular maritime transport services (DG Energy and Transport)** is certainly the only reliable source to contemplate the employment of these seafarers.

From this study, the next table shows the number of ships per Member state (plus Norway) per ship type engaged in Intra-EU operation in 2008.

	Container Feeder	Passenger Ferries	Ro-Ro	Total
BELGIUM	15	16	30	61
BULGARIA	4	8	0	12
CYPRUS	1	9	5	15
DENMARK	120	84	27	231
ESTONIA	0	32	5	37
FINLAND	10	74	45	129
FRANCE	55	105	17	177
GERMANY	93	126	33	252
GREECE	7	379	50	436
IRISH REPUBLIC	11	25	7	43
ITALY	11	386	61	458
LATVIA	0	3	3	6
LITHUANIA	3	7	0	10
LUXEMBOURG	0	0	0	0
MALTA	0	15	2	17
NETHERLANDS	50	31	27	108
NORWAY	5	413	136	554
POLAND	6	38	6	50
PORTUGAL	8	37	1	46
ROMANIA	4	4	2	10
SLOVANIA	0	3	0	3
SLOVAKIA	0	0	0	0
SPAIN	19	83	24	126
SWEDEN	2	132	31	165
UK	31	187	46	264
TOTAL	455	2197	558	3210

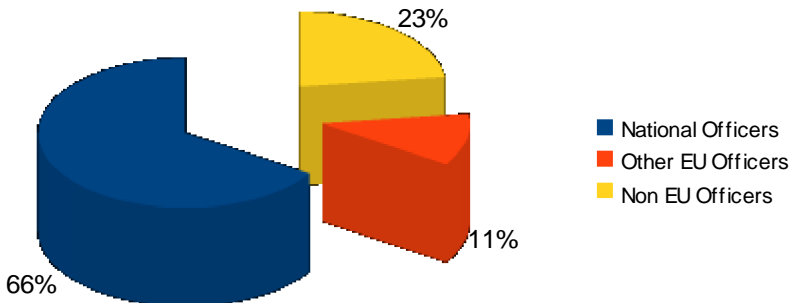
Source: ECORYS 2009

These **3 210** EU ships (including Norway) represent
28% of the total EU Fleet as determined by ISF/BIMCO
 or near **20%** according to ECSA 2010 report.
 Ferries are for near **77%** of the total number of ships engaged in Intra-EU traffics.

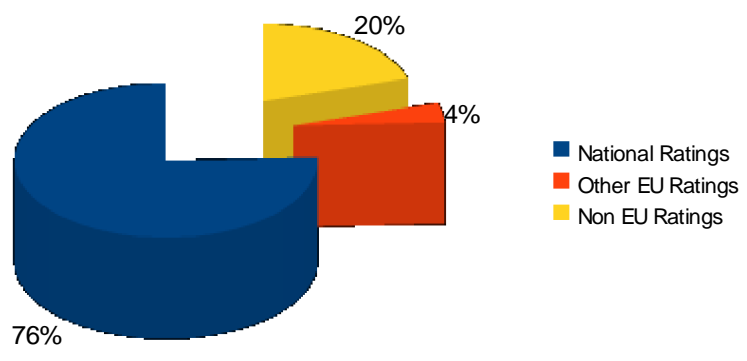
According to ECORYS, the nationalities distribution of seafarers working on these ships is as follows:

*Officers and ratings employed on regular Intra-EU ships flying an EU flag (plus Norway)
By nationality*

Officers



Ratings



Source: ECORYS 2009

Intra-EU traffics offer about **18 500** jobs for officers (**13%** of the total number of EU and Norwegian officers) and **63 300** for ratings (**57, 5%** of the total number). This high percentage for the latter can be explained by employment on the **2 197** ferries, where the crew number is favourable to ratings, especially in hotel department. There is no indication about the continuity of these jobs all around the year, while employment of seasonal personnel is a major factor to estimate full time equivalent jobs.

According to ECORYS, main nationalities of **non-nationals** (EU and non EU) on board EU ships engaged in Intra-community traffics are:

EU officers: Polish, Bulgarian, Greek, Romanian, Swedish,
Non EU officers: Ukrainian, Filipinos, Russian, Croatian, Moroccan,
Non EU ratings: Filipinos, Russian, Ukrainian, Indonesian, Moroccan.

4.7.2. Development of Intra-community regular maritime transports

In the 2009 study, ECORYS has estimated an evolution of the number of ships engaged in Intra-Community traffics, based on the freight forecast and including estimation of the growing of ships size. This estimation shows for the year 2018 a strong increasing of containers ships, from 460 to more than 600, but a slight decreasing of passenger ship (less 87) and ro-ro ships (less 65).

In term of employment, these forecast changes will probably have a negative impact for ratings.

4.8 EMPLOYMENT OF EU SEAFARERS ON THIRD FLAGS SHIPS

According to ISL 2010, **7 392** ships are under control of companies based in EU (See Annex B) and registered in an other country than the country of the parent company. It is supposed that these ships are owned by the parent company or long term bare-boat chartered. No indications are given on flags and there is no distinction between EU flags and third countries flag.

No data were found on employment of EU seafarers on these ships except for France (2009) and Greece (2006). The number may be high, as for instance in the case of a ferry, or null in the case of a Liberian ship manned with a full Filipino crew. It is assumed that employment of Western EU seafarers on third countries foreign flag ships remains probably marginal, even when a link is maintained with the original European employer, with some exceptions as for British, German and Greek officers, especially at management level (For instance, in 2006, 588 Greek officers were employed on foreign flag ships on a total of 6 821 officers).

Finally, no data exist in any country about European seafarers employed under free-lance contracts by non European foreign companies.

4.9 SUPPLY/DEMAND OF SEAFARERS IN EU

4.9.1. Worldwide situation

When estimating worldwide supply/demand balance of seafarers in 2010, ISF/BIMCO notes the existence of a “modest shortage of officers” (of about **13 000**, **2,1%** of the total) and an approximate balance for ratings. Drewry estimates a more important shortage for the officers at near **30 000** (no estimation is given for ratings).

In **2014/15**, officers' gap estimation is reversed when looking at ISF/BIMCO and Drewry results. The first predicts a growing of the shortage up to **30 000** and the second a decreasing by the half. Then at the horizon of 2020, ISF/BIMCO figures show a slight shortage of officers, more pronounced for ratings but far from a worrying scenario.

In a study on the “Future global supply and demand for seafarers” dated May 2010, the **Japanese International Transport Institute** estimates the global demand of officers and seafarers at a lower level than ISF/BIMCO and Drewry. JITI doesn't calculate supply, estimating that, globally; the labour market permanently adapts the balance.

The next table shows the worldwide estimated situation as projected by the ISF/BIMCO, Drewry and the JITI up to 2020:

	ISF/BIMCO			DREWRY			JITI		
	SUPPLY	DEMAND	GAP	SUPPLY	DEMAND	GAP	SUPPLY	DEMAND	GAP
	2010			2010			2010		
OFFICERS	624062	636543	-12481	532400	562200	-29800	na	445055	
RATINGS	747000	747000	0	758400	na		na	648914	
	1371062			1290800				1093969	
	2015			2014					
OFFICERS	690199	720440	-30241	606900	621200	-14300			
RATINGS	764000	803000	-39000	na	na				
	2020						2020		
OFFICERS	764281	772198	-7917				na	477208	

4.9.2. Situation in Europe

Looking firstly at the situation in OECD group by ISF/BIMCO, the shortage of officers is more notable, with a **gap** of **45 000** between supply and demand for officers, and of **145 000** for ratings. In East Europe group, **surplus** in 2010 are of **95 000** officers and **73 000** ratings.

(These figures reflect the “Benchmark scenario” of the ISF/BIMCO study; for the years 2015 and 2020, the two other alternative demand scenarios “hot” and “cold” have not been considered in this study in order to remain in a rather simple context. The estimated growing of the world fleet is around 2,3% per year).

Estimated Supply/Demand in OECD Countries			
	SUPPLY	DEMAND	DIFF
2010			
OFFICERS	184000	229000	-45000
RATINGS	143000	288000	-145000
2015			
OFFICERS	194000	257000	-63000
RATINGS	117000	309000	-192000
2020			

Estimated Supply/Demand in Eastern Europe			
	SUPPLY	DEMAND	DIFF
2010			
OFFICERS	127000	32000	95000
RATINGS	109000	36000	73000
2015			
OFFICERS	140000	35000	105000
RATINGS	108000	36000	72000
2020			

The **gap** will grow for OECD countries in the next ten years, up to **70 000** officers and **221 000** ratings, when the **surplus** of Eastern Europe seafarers will be **118 000** officers and **73 000** ratings. (*Drewry doesn't provide projected demand in 2014 by region*).

During the same period, the number of active officers is supposed to grow in both OECD and East Europe (respectively of 11,4% and 21,2 %) , when the number of ratings will decrease in OECD (less 33,5%) and will stay broadly the same in East Europe.

The **ECORYS 2009** study established estimation on supply/demand of seafarers in Europe in order to assess a potential shortage of seafarers by countries. However, as reported in part 1, the supply numbers of seafarers in this study, reflecting the numbers of issued certificates by country, including renewals, appears too far from the numbers of seafarers really available for service in 2010 and therefore has not been considered for the purpose of the present study.

It seems hazardous to precisely estimate the future demand for EU countries without a solid process, as developed by Warwick University or Precious Limited for the purpose of ISF/BIMCO or Drewry studies.

Some assumption can nevertheless be deducted from existing studies regarding the situation in EU for both officers and ratings.

For the two categories, the gap will continue to be filled with Eastern workforce (inside European community, plus Ukrainian, Croatia, Russia) and Indian and South East Asia seafarers.

Considering that general conditions of the “OECD” grouping in the ISF/BIMCO study are globally applicable to Western EU countries and Norway (ageing workforce, number of new entrants, wastage ..) the number of officers in these countries will have to grow in the next 10 years of about **10%** to meet the supply estimation and remain more or less at the 2010 level. This must be counted on the need to keep EU officers at management level on board and to ensure sufficient availability for maritime clusters.

If the same hypothesis is kept for Eastern Europe grouping, the growing of officers will have to be of about **20%** in this part of EU.

According to the projection, the number of ratings is severely decreasing between 2010 and 2020 in OECD countries. This confirms again that the existing trend of workforce transfer from developed countries towards India subcontinent and East Asia will continue during the coming years.

Inside EU however, a particular attention regarding employment of ratings will be focused on all Intra-community or national traffics and activities at sea, in order to keep sufficient workforce to meet local needs.

In order to keep the 2010 equivalent situation regarding the weight of European officers in the worldwide workforce, number of officers will have to grow in the next 10 years of :
10% in Western EU countries
20% in Eastern EU countries

5. OTHER ELEMENTS

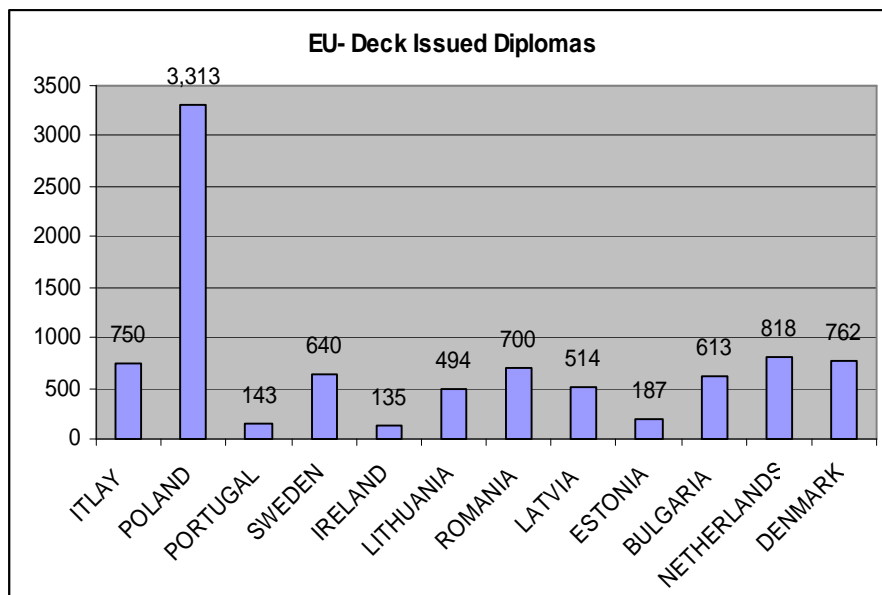
5.1 RECRUITMENT AND TRAINING

As for other data, information on number of students in EU maritime colleges or academy attending STCW certificates courses are not systematically available in individual countries. The number of trainees on board national ships is rarely indicated, although this information is of high importance to assess the future availability of officers and ratings.

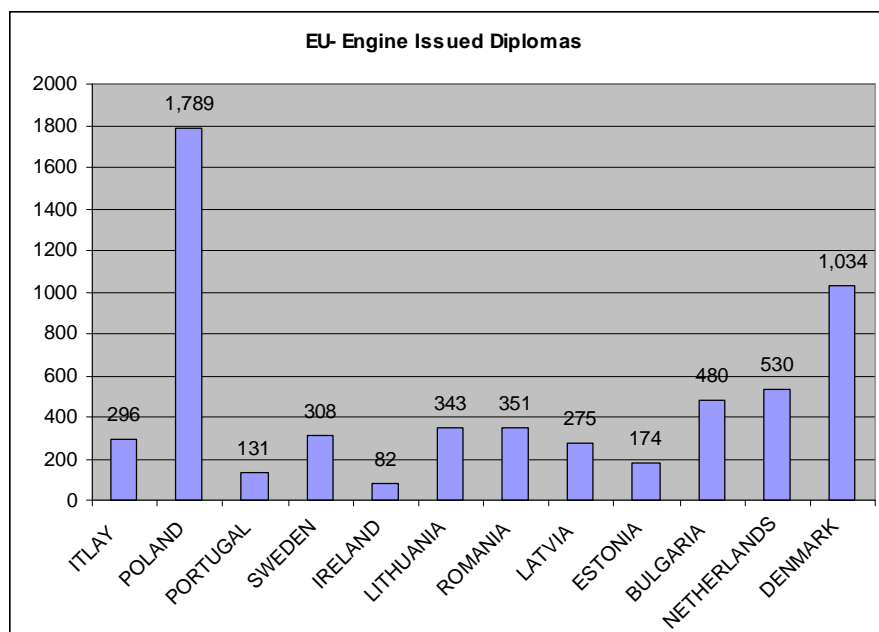
As **EMSA** is in the process of operating a data-basis to collect the certificates delivered each year by the Member States to national seafarers and equivalence to non nationals (STCW-Information System), the Agency has been asked by the consultant about current availability of data. The answer of the Agency indicates that the System will not fully operate before 2012.

However, some data from selected countries are already available, as shown here after. The numbers as reported in these two tables represent the total of deck and engine certificates issued from the given countries between years from 2005 to 2009.

Source: EMSA



Source: EMSA



These figures are not specific enough for a detailed analysis. The term Diploma is too vague and there is no distinction on STCW level of the certificates. They only give a general view on the capacities of these countries to train new seafarers.

Poland has been clearly a major provider of new seafarers during these past years, for the benefit of foreign flags. On these examples, the number of engine certificates issued (for a total of 5793 on the period) is much lower than deck certificates (8989). This must be questioned while most of the shipowners are claiming for engine officers.

For the present study, information about numbers of cadets or new entrants in maritime education for years 1009/2010 was collated from different sources. They are shown in the table below, though some of these figures are questionable as there is no clear indication of what they exactly represent.

COUNTRY	Source	NUMBER OF STUDENTS IN MARITIME EDUCATION	Year	NUMBER OF CADETS ON BOARD			Year	NUMBER OF CERTIFICATES ISSUED		Year
				Deck	Engine	TOTAL		Nationals	Non Nationals	
		<i>Nationals</i>								
BELGIUM										
BULGARIA										
CYPRUS										
DENMARK	DMA 2011	1516	2009					872		2009
ESTONIA										
FINLAND										
FRANCE	Seafarers' Observatory					714	2008			
GERMANY	ETF	755	2009							
GREECE	National Statistics Bureau	3745	2003	756	488	1244	2006			
IRELAND										
ITALY										
LATVIA	Latvian Maritime Academy	922	2011					426		2010
LITHUANIA										
LUXEMBOURG										
MALTA										
NETHERLANDS	Nederlandse Maritime Clust							540	200	2009
NORWAY	ETF	546	2006							
POLAND	ETF	2115	2008			760	2008	338		2008
PORTUGAL										
ROMANIA				3427	1858	5285				
SLOVAKIA										
SLOVENIA										
SPAIN										
SWEDEN										
UK	UK Seafarers Statistics	754	2010	1830			2010			

ECORYS study 2009 mentions information on the total number of certificates issued in 2007 by each EU country, but the numbers include renewals (as STCW rules) and therefore can't give a clear view on the number of students or cadets.

The study gives also the number of "new entrants" for which it is understood that for some countries is the number of students and for other the number of graduates. The next table is extracted from ECORYS 2009 (figures given for year 2007, EU plus Norway).

COUNTRY	OFFICERS	RATINGS	TOTAL
BELGIUM	56	131	187
BULGARIA	440	452	892
CYPRUS	488	59	547
DENMARK	508	1839	2347
ESTONIA	140	115	255
FINLAND	392	464	856
FRANCE	650	400	1050
GERMANY	942	0	942
GREECE	1930	742	2672
IRELAND	35	0	35
ITALY	1500	na	1500
LATVIA	1371	1757	3128
LITHUANIA	297	294	591
LUXEMBOURG	0	0	0
MALTA	3	64	67
NETHERLANDS	621	0	621
NORWAY	na	na	0
POLAND	968	na	968
PORTUGAL	23	46	69
ROMANIA	1355	1207	2562
SLOVAKIA	na	na	0
SLOVENIA	na	na	0
SPAIN	na	na	0
SWEDEN	819	466	1285
UK	3012	na	3012

Source: ECORYS 2009

ECORYS mentions national statistics and maritime educational institutes as sources for these figures. However, due to a lack of data, some figures are estimated or extrapolated. Grey cells indicate number of graduates.

A comparison with the previous table, where some figures are also coming from national statistics, and even with two years interval, makes difficult to estimate precisely the training potential of each country.

It is clear that these data is **insufficient** and not detailed enough to provide a good view of the number of EU new officers and ratings entering the labour market year by year.

This is particularly prejudicial in a context of ageing of the European seafarers. At least, the EMSA System will be a precious tool for a better knowledge of the maritime training and the future manning resources.

5.2 WOMEN EMPLOYMENT

Only **6** countries (*Bulgaria, Germany, Lithuania, Norway, Sweden, UK,*) provide detailed information in national statistics on women employment, from which the two below tables were drawn up:

The first one shows the percentage of women employment on the **total of seafarers**, by department:

	TOTAL WOMEN EMPLOYMENT		
%	DECK	ENGINE	CATERING
OFFICERS	26,85	7,47	65,68
RATINGS	5,98	0,65	93,17

The second shows the repartition **by department** of the **total of women seafarers**:

	% OF TOTAL SEAFARERS			TOTAL
%	DECK	ENGINE	CATERING	
OFFICERS	1,07	0,28	33,26	1,75
RATINGS	1,85	0,32	35,28	14,91

The only comprehensive study on Women employment in the maritime industry seems to be an **ILO** survey carried on by the **Seafarers International Researcher Centre** (Cardiff, UK) in 2003 (Women seafarers, Global employment policies and practices). From this study, women in Scandinavian countries make up more than 10% of the seafaring workforce, 8, 3% in the UK, 4, 2% in Germany, when figures for other European countries are negligible. Individual results for the four above countries are broadly in line with these figures 8 years after.

The **ILO** survey highlighted that women seafarers were concentrated in **hotel personnel on passenger ships**.

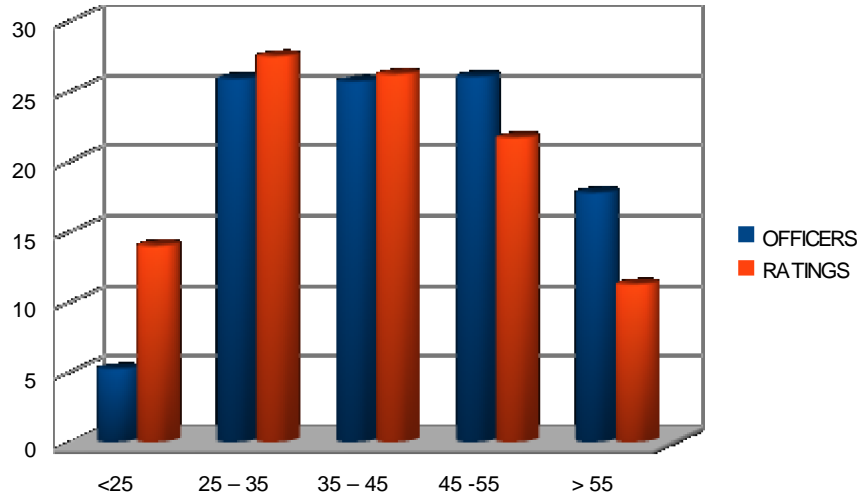
Above figures certainly reflect employment in EU and Norway on passenger vessels, mostly ferries. Numbers of women officers or ratings **in other departments remains negligible**, although the number of women in the maritime schools has increased over these past years

Compared with figures of 2003, the 2010 results remain disappointing although efforts have been made during these past years by both shipowners and unions to attract young women towards sea-careers.

No information was found on **employment conditions**. Regarding deck and engine department, it is assumed that there is no salary discrimination, as most of shipping companies use standardized ranks salary scales. This situation certainly also applies to leaves ashore and duration of voyage, subject to further researches. Situation can be of course quite different on passenger ships in hotel department, especially on cruise ships, where hotel staffs are recruited through crewing agencies.

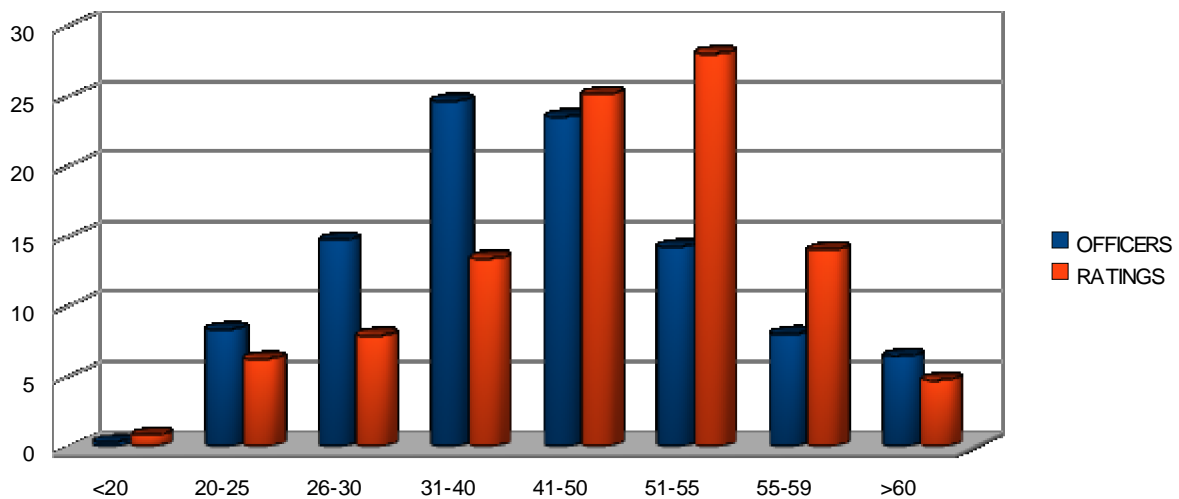
5.3 AGE PROFILE

Information on age profile was found in national statistics for only 5 countries (*Bulgaria, Lithuania, Norway, UK and Greece*). Therefore, the next table, reflecting ages of active officers and ratings in these countries must be regarded more as an exercise than an accurate basis for projections.



ISF/BIMCO 2010 study shows detailed tables of age structure for each of the five regions. The tables are based on data from company questionnaire and certainly well reflect the situation in these companies. As for others data, it is not possible to isolate proper EU figures.

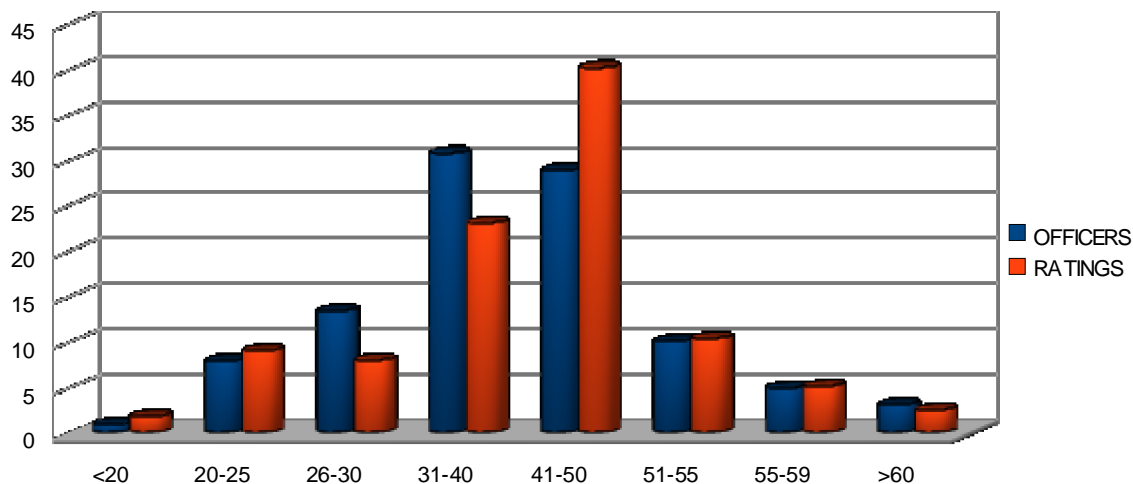
The age structure for OECD seafarers in ISF/BIMCO study is as follows:



More than 25% of officers are over 50 years old and the total older than 40 is more than 50%. However, the age structure seems more balanced than it was ten years ago. It can be assumed that most of seafarers over 50 will remain at sea up to retirement. The challenge for the industry is certainly to day to make sea-careers attractive enough to prevent young people to turn on jobs

ashore. Wastage remains a great uncertainty to adjust recruitment in order to meet future demand.

The age structure for Eastern Europe seafarers in ISF/BIMCO study is as follows:



Not surprisingly, the table shows that the youngest population of seafarers come from the Eastern and Central Europe.

Age structure is one of the main factor, with wastage, used by **ISF/BIMCO** to estimate future supply.

The 2010 study notes that seafarers from OECD countries “*tend to be rather older than average*” and that differences between OECD and Far East and Indian Sub-Continent are “*not as marked as a few years ago*”.

5.4 WAGES

The intention here was to have an idea about **seafarers wages compared with ashore workers' salaries** with the same educational level. This has been difficult to achieve in the scope of the present study, the question of wages of EU seafarers certainly requiring a dedicated study since the subject is large and cannot be considered without other elements of working conditions, as leave ashore and voyage length or for some countries, fiscal facilities granted to seafarers.

In general, there is no published information on real seafarers' salaries at national level. Legal minimum salaries exist in some countries, or wages as from collective agreements, which both do not reflect necessary real wages. Moreover, collective agreements' wages tables include generally several ships' type, and refer to bonus or supplements not easy to understand when they are applicable or not.

International wages standards, as **ILO minimum** or **ITF TCC** agreements (applicable to ships under “flag of convenience” as specified by ITF) have not been considered as relevant for European seafarers (Though ITF agreements can exist for employment conditions of Eastern Europe seafarers on Western Europe ships).

ECORYS study 2009 provides indications on gross wages in intra EU shipping (from shipping companies), but on this point, the scope of the study is uncertain. **Drewry** annual reports give wages indications and trends for the selected countries of the study, but including per month served on board basic wage, vacation and guaranteed overtime or bonus. The great variation of these last elements makes difficult to estimate the basic monthly wage itself to be compared with salaries ashore (*e.g. : leave rate from 9 to 30 days by month at sea*).

Regarding salaries ashore in the EU, the only reliable harmonized source is **Eurostat**, which provides data on average earnings by job-types in selected sectors. However the last publication, (2009 published in March 2010), contains some data from 2006.

Some national statistics give examples of gross earnings in the industry or other activities, but in too many different sectors to set up a reliable reference table.

The first table on next page gives some indications, from these different sources, to be read with all reservations above. The average monthly salaries for manager, technician and worker are extracted from Eurostat 2010 (wages 2009). Comparison is made at equivalent level for a captain, an officer (3rd mate or engine officer) and an AB with figures coming from ECORYS (officer and AB only) and other sources (in Euros, converted from US Dollars for Drewry data). As significant differences exist between tankers and dry ships, the column *mini* refers in general to small dry cargo, when *maxi* reflects wages on larger tankers and gas ships.

The second table is also extracted from Drewry survey 2010 and gives total wages (*in Euros converted from US Dollars*) for Filipinos, Chinese and Indian seafarers, as a comparison with European seafarers

AVERAGE MONTHLY SALARIES (Euros)

	MANAGER	CAPTAIN		TECHNICIAN	OFFICER			CRAFT WORKER	AB			Source
		min	max		ECORYS	min	max		ECORYS	min	max	
BELGIUM	5945			3177	3980			2414	2000			
BULGARIA	474			284	2170			201	1020			
CYPRUS	4327			2294	2650				1200			
DENMARK	6313	6500	11000	4338	3980			3325	2000			Drewry 2008
ESTONIA	1388			913	2650				800			
FINLAND	5402			2978	3920			2499	2600			
FRANCE	5323	5000	9000	2705	4510	3500	5500	1917	2450	2000	2500	Companies
GERMANY	6434	5750	6230	3651	4560	4100	4450	2519	1900	3370	4000	ETF
GREECE	3502	10073	11458	1911	6890	5283	6250	1755	2650	3000	3300	Greek survey
IRELAND	5469			4102	3710			3430	1650			
ITALY	5895			2679	4530			1856	2750			
LATVIA	911	5780	8000	601	4240	2250	2550	413	1500	1230	1240	Companies
LITHUANIA	956			551								
LUXEMBOURG	7688			4304	3980			2499	2000			
MALTA	2278			1456	1300				330			
NEIHERLANDS	4365			3253	3980			2750	2000			
NORWAY	6385			4742	4190			3644	2100			
POLAND	1743	4900	14000	818		1960	5250	607		1260	1400	Drewry 2010
PORTUGAL	3471			1712				803				
ROMANIA	926	4200	12250	388		2100	4200	299		700	1400	Drewry 2010
SLOVAKIA	1418			705				493				
SLOVENIA	3074			1475				959				
SPAIN	4315	5400	11000	2271	2650			1569	1500			Drewry 2008
SWEDEN	5054			3351	3800			2595	2320			
UK	6013	10000	14000	3887	3710	3700	6300	3187	1650	3700	4550	Drewry 2010
EU average	4876			2285	3748			1854	1812			

Source: Eurostat 2009 for wages ashore, ECORYS 2009, Drewry and others for seafarers.

		CAPTAIN		OFFICER		AB	
		mini	maxi	mini	maxi	mini	maxi
PHILIPPINES	Tankers	5950	9800	2450	2800	840	1260
	Dry	4550	5950	2310	2660	700	840
CHINA	Tankers	7000	8750	1750	2100	560	700
	Dry	4200	4900	1540	1960	420	700
INDIA	Tankers	7700	11200	2450	3360	700	1050
	Dry	5600	7000	1750	2100	560	700

Source : Drewry 2010

Officers' wages in EU remain certainly **higher** than average salaries ashore, although **the difference is more marked for operational officers** than at management level.

It is clear that this difference becomes much more important in favour of seafarers from **Eastern Europe**.

5.5 EMPLOYMENT IN MARITIME CLUSTERS

Two main studies have been produced these past years on “Maritime clusters” in Europe and their economical weight in term of added value and employment.

In 2006, a study by **ECOTEC** Research & Consulting (UK) for DG Fisheries and Maritime Affairs “*An exhaustive analysis of employment trends in all sectors related to sea or using sea resources*” provided a general picture of European maritime clusters, with an attempt of a harmonised approach on clusters' composition. The study identified 13 sectors as being relevant of maritime clusters, generating approximately 5 Million jobs in 2004/2005. About 3 Million jobs being related to coastal tourism, with unreliability on data in this sector, the estimate number of jobs for the “traditional maritime industries” was at this time 1.9 Million.

A graph and a table extrapolated from this study are reported in the next page, showing the number of jobs for the different sectors.

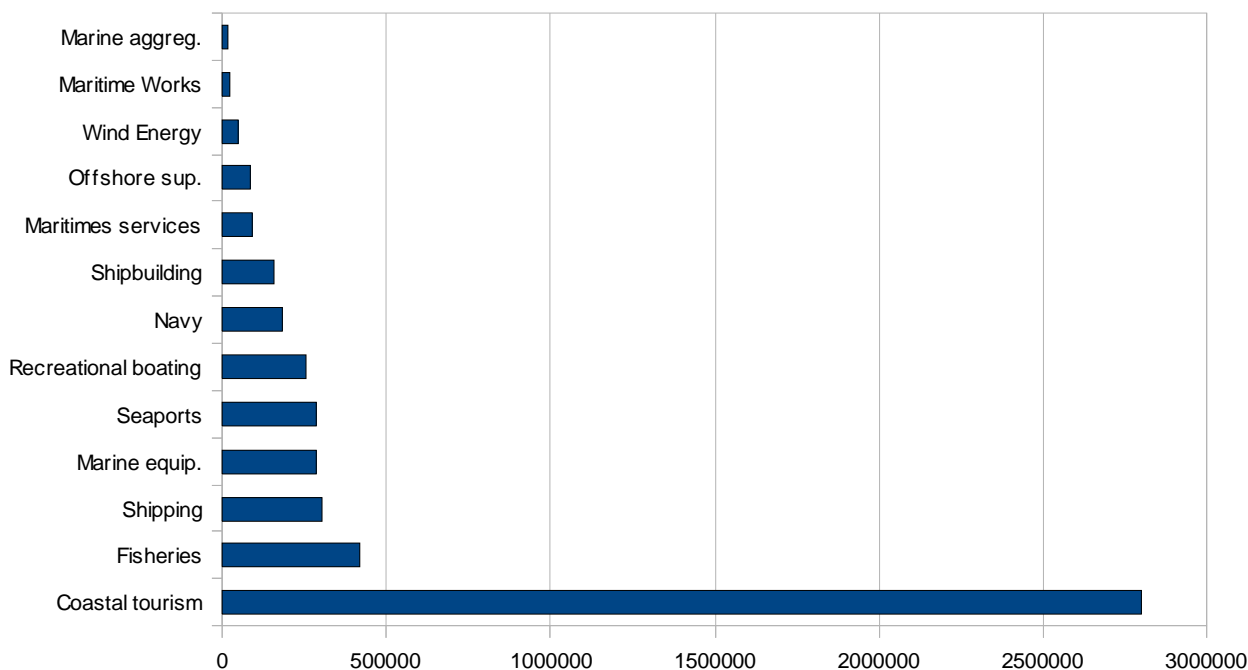
A second study (“*The role of maritime clusters to enhance the strength and development of European maritime sectors*”), executed by **Policy Research Corporation** (B) in 2008 for the same DG, gives the added value and number of employments in 11 sectors. Employment data found in this study are largely coming from ECOTEC with adjustment made by Policy Research. The study gives a view of added value and employment of maritime clusters in the European countries and estimates the total number of jobs at 4, 78 Million.

It will be noted that in the chapter “Seafaring expertise ashore”, ECORYS 2009 study also refers to ECOTEC 2006 figures. Little information was found from national clusters' website or annual reports regarding employment in different sectors.

Employment of **seafarers at sea** is included for the two studies in the data of the “shipping” sector, but it is not clear if employment figures in other sectors as offshore, maritime works (dredging or other) or maritime services and coastal tourism include or not seafarers. Moreover, no exploitable data are found on employment **ashore** of active or past-seafarers in the shipping sector and in other maritime related industries.

In the absence of detailed data on employment of **officers and ratings** in the different sectors of the maritime clusters, it seems difficult to evaluate the future need of **experienced seafarers** ashore in these sectors.

Share of different maritime sectors (2004/2005)



Source: ECOTEC 2006

Number of employments generated in the different sectors (years 2004/2005)

Sectors	Employment	%
Coastal Tourism	2 800 000	56,74
Fisheries	420 000	8,51
Shipping	303 000	6,14
Marine Equipment	287 000	5,82
Seaports	284 000	5,76
Recreational Boating	253 000	5,13
Navy	180 000	3,65
Shipbuilding	153 000	3,10
Maritimes Services	88 000	1,78
Offshore Supply	81 000	1,64
Wind Energy	48 000	0,97
Maritime Works	20 000	0,41
Marine Aggregates	17 800	0,36
Total	4 934 800	

Source: ECOTEC 2006

6. COUNTRIES DATA

For each of 23 EU maritime countries (25 less Slovenia and Slovakia where sufficient information was not available), and Norway, an individual standard form shows:

1 - Total number (officers and ratings) of national and non national seafarers (when available) from different sources if any.

The figures proposed by ISF/BIMCO 2010 update have been systematically reported as they are the only harmonised data in this field.

Data from other sources, as national administrations or shipowners' association is shown when available. In very few cases, it is possible to make a distinction between EU and non EU seafarers and data are provided by function on board.

- Training

Number of students in Maritime schools, colleges or academies and number of cadets on board when available.

- Number of seafarers (officers and ratings) by occupation on board (Deck, engine, other) when available.

The data is not available for all EU countries. When they are, again the lack of coherence in the national statistics can make difficult a harmonised presentation. The distinction between officers and ratings is sometimes not clear. To avoid a too much detailed table without added value, the functions were grouped as follows:

Officers :

Deck : Captains and deck officers

Engine: Chief engineers, engineers, general purpose, technical or electrician officers

Other: Pursers, hotel officers, catering officers or other officers.

Ratings:

Deck: Deck seafarers and other deck occupation

Engine: Engine seafarers and other engine occupation

Other: hotel and catering staff, other occupation.

Most of the seafarers entering in the category "Other" are in fact catering and hotel personnel. In some countries, these personnels can be considered as "no seafarers" and therefore not reported in the statistics.

2 - Size and ship-types of national fleet.

Except data from national administrations and shipowners' association, the only source about fleets size and structure is IHS-Fairplay (which manages the IMO ship and company numbering scheme on behalf of the IMO). This firm regularly produces very detailed information regarding the fleet evolution in the world. But synthetic and more readable reports are produced from IHS-Fairplay publications by ISL Bremen (Institut für Seeverkehrswirtschaft und Logistik). Reports of the latter have been used for this study.

The ship-type table model uses the ISL classification: tankers, bulk carriers, containers,

general cargo and passengers ships.

- Number of controlled ships under foreign flags (EU or non EU when available).

This information was collected from different sources, with some question about the reliability of the data. The definition of a “controlled ship” can vary from a source to another, the most accurate is a ship owned or long-bare boat chartered by a national company but registered in an other country. In principle, other chartered ships without manning and technical control by the mother company are not included, but it is difficult to have a clear view on this question in the scope of this study and further investigation would be necessary to identify the impact of the number of controlled ships on the employment.

3 - Women employment.

Detailed data on women seafarers are available for some countries and are reported in this section.

4 - Age profile (national seafarers).

Very few information are available on age profile in countries' statistics. When available, these data are shown under the following distribution:

<25	25 - 35	35 - 45	45 - 55	> 55
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5 - Wages elements.

Figures from ECORYS 2009 are reported, and from other sources when available. The reference used for wages ashore is the Eurostat publication “Labour market statistics” 2010, from where three average salaries were extracted: manager, technician and craft worker, to be compared with captain, officer and AB.

Some national statistics gives examples of gross earnings in the industry or other activities, but in too many different sectors to build up a reliable reference table.

6. Employment in maritime clusters.

The result of the ECOTEC study, 2006, “An exhaustive analysis of employment trends in all sectors related to sea or using sea resources” was systematically reported in this section, as being the only harmonized data source on employment in Maritime clusters. Mention is made of other sources when necessary.

BELGIUM

1. NUMBER OF SEAFARERS – 0,005% of the Population (10 839 900)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO	498	92	590
Non nationals			
			na

2. NATIONAL MERCHANT FLEET

2.1 Number of ships registered in the country including second register:

2.1.1 ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	38	3441
Bulk carriers	20	2705
Container ships	4	122
General Cargo	15	113
Passenger ships	2	1
Total	79	6382

2.1.2 The Public Federal Service for mobility and transport publishes the exhaustive list of ships registered under Belgian flag (All sizes included):

Type	Number
Tankers	31
Bulk carriers	18
Container ships	6
General Cargo	20
Passenger ships	4
Harbour & Offshore	94
Total	173

Source: Belgian Public Federal Service for Mobility and Transports

2.2 Number of controlled ships: **103** (dwt: 6 102 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 3980

AB: 2000

Average salaries ashore:

Eurostat 2009

Manager : 5945

Technician: 3177

Craft worker: 2414

Institut National des Statistiques 2009

Executive manager: 7 624

Middle manager: 5 416

Employee: 1 965

6. MARITIME CLUSTER

na

BULGARIA

1. NUMBER OF SEAFARERS – 0,14% of the Population (7 560 710)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO	10890	22379	33269
MARAD*	11504	7292	18796
Non nationals			
MARAD*	3	7	10

*Bulgarian Ministry of Transport - European Union, International Affairs and Projects Directorate

1.2 Details by department on board

	Nationals	Non nationals	Total
Officers			
Deck	3860	3	3863
Engine	3575		3575
Dual Purpose	4069		4069
Ratings			
Deck	2669	7	2676
Engine	4623		4623
Other			
Total	18796	10	18806

Source: MARAD

2. NATIONAL MERCHANT FLEET

2.1 Number of ships registered in the country including second register:

ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	8	28
Bulk carriers	16	464
Container ships		
General Cargo	14	130
Passenger ships	1	5
Total	39	627

2.2 Number of controlled ships: na

3. WOMEN EMPLOYMENT

	Deck	% of Total	Engine	% of Total	Total	% of Total
Officers	19	0,5	13	0,36	32	0,28
Ratings	5	0,18	1	0,02	6	0,08
<i>Total</i>	24	0,68	14	0,38	38	0,33

Source: MARAD

4. AGE PROFILE

	< 25	25 - 35	35 - 45	45 - 55	> 55	Total
Officers	406	3142	3657	2830	2607	12642
%	3,21	24,85	28,93	22,39	20,62	
Ratings	35	894	1944	2525	2134	7532
%	3,21	24,85	28,93	22,39	20,62	
<i>Total</i>	441	4036	5601	5355	4741	
%	3,21	24,85	28,93	22,39	20,62	

Source: MARAD

5. WAGES ELEMENT

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 2170

AB: 1020

Average salaries ashore:

Eurostat 2009

Manager: 474

Technician: 284

Craft worker: 201

The average monthly salary ashore in 2009 was 302 Euros (Source: Vienna Institute for International Studies)

CYPRUS

1. NUMBER OF SEAFARERS – 0, 36% of the Population (803 150)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO	2907	514	3421
Non nationals			
			na

2. NATIONAL MERCHANT FLEET

2.1 Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	154	10568
Bulk carriers	262	14053
Container ships	190	4813
General Cargo	195	1820
Passenger ships	27	103
Total	828	31357

- Cyprus Shipowners' Association: 1026 ships in 2009 (third fleet in the EU).

2.2 Number of controlled ships under foreign flags: **134** (dwt: 3 897 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENT

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 2650

AB: 1200

Average salaries ashore:

Eurostat 2009

Manager: 4327

Technician: 2294

Craft worker: 1200

6. MARITIME CLUSTER

na

DENMARK

1. NUMBER OF SEAFARERS – 0, 09% of the Population (5 534 740)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO	2762	1176	3938
DMA*	2896	1882	4878
Non nationals			
EU & EAA*	314	596	910
Other nationalities*	979	2844	3823

Total number of seafarers under Danish flag: 9611 (Officers: 4289 – Ratings: 5322)*

*Danish Maritime Authority 2011 (Figures 2009) Including second register DIS

Important note: According to the DMA, the number of seafarers as shown in the DMA report reflects the number of officers and ratings **signed on** per 30 September 2009. A back-up ratio of about 1, 5 to 1, and 6 has to be applied to obtain the total number of active Danish seafarers.

1.2 Training

Source DMA 2011: Number of graduates in 2009: 872 (Merchant marine).

Intake of students in maritime training programmes in 2010: 1516.

It is not clear to determine the number of students attending classes for merchant navy and for fishing vessels.

2. NATIONAL MERCHANT FLEET

2.1 Number of ships registered in the country including second register:

ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	156	5993
Bulk carriers	4	497
Container ships	89	6867
General Cargo	81	327
Passenger ships	46	95
Total	376	13779

- DMA 2011 (ships of 100GT and over): under Danish flag (DAS&DIS) **536**.
- Danish Shipowners' Association : **536**

2.2 Number of controlled ships under foreign flags:

- ISL SSMR 2010 (ships of 1000GT and over) : **573** (dwt : 20 907 000)
- DMA 2011 (ships of GT 100 and over) : **826**

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 3980

AB: 2000

Drewry 2008 (Includes vacation, granted overtime and bonus)

Captain: 6500 - 11000

Average salaries ashore:

Eurostat 2009

Manager:

Technician:

Craft worker:

6. MARITIME CLUSTER

Sectors	Number	%
Navy	na	0
Marine equipment	20459	25.71
Shipping	16243	20.41
Seaports	na	0
Shipbuilding	3595	4.52
Recreational boating	na	0
Offshore supply*	1493	1.88
Maritime services	34101	42.86
Inland navigation	na	0
Maritime works	na	0
Coastal tourism	na	0
Fisheries	3681	4.63
Total	79572	100

Source: DMA 2011 – Figures 2006

*According to DMA, approximately 10% of the direct employed in the offshore sector have a background as maritime officers, of which most of them are marine engineers. 15% of ships in the Danish International Register are engaged in the offshore sector, including wind power industry. This amount to a total of more than 100 small vessels, of which 46 are registered as supply vessels.

ESTONIA

1. NUMBER OF SEAFARERS – 0, 67% of the Population (1 340 130)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	2700	6300	9000
Non nationals			
			na

2. NATIONAL MERCHANT FLEET

2.1 Number of ships registered in the country including second register: **21**
ISL SSMR 2010 (ships of 1000GT and over) No detailed fleet available.

2.2 Number of controlled ships under foreign flag: **77** (dwt: 305 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 2650
 AB: 800

Average salaries ashore:

Eurostat 2009

Manager: 1388
 Technician: 913
 Craft worker: 800

6. MARITIME CLUSTER

Sectors	Number	%
Navy	300	1.53
Marine equipment	1500	7.65
Shipping	4500	22.94
Seaports	10300	52.52
Shipbuilding	2701	13.77
Recreational boating		0
Offshore supply		0

Maritime services	312	1.59
Inland navigation		0
Maritime works		0
Coastal tourism		0
Cruise tourism		0
Fisheries		0
Total	19613	100

Source: ECOTEC 2006.

FINLAND

1. NUMBER OF SEAFARERS – 0, 78% of the Population (5 351 430)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	3000	1200	4200
Non nationals			
			na

2. NATIONAL MERCHANT FLEET

Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	11	609
Bulk carriers	1	4
Container ships	3	37
General Cargo	58	383
Passenger ships	20	69
Total	93	1102

- Finnish Shipowner's Association 2010 : **114**

2.2 Number of controlled ships under foreign flags: **51** (dwt: 1 112 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENT

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 3920

AB: 2600

Average salaries ashore:

Eurostat 2009

Manager: 5402

Technician: 2978

Craft worker: 2499

6. MARITIME CLUSTER

Sectors	Number	%
Navy	2300	1.91
Marine equipment	19000	15.82
Shipping	11295	9.4
Seaports	3529	2.94
Shipbuilding	4823	4.01
Recreational boating	4500	3.75
Offshore supply	661	0.55
Maritime services	na	0
Inland navigation	na	0
Maritime works	249	0.21
Coastal tourism	73770	61.41
Cruise tourism	na	0
Fisheries	na	0
Total	120127	100

Source: ECOTEC 2006

FRANCE

1. NUMBER OF SEAFARERS – 0,021% of the Population (64 714 080)

ISF/BIMCO 2010	Officers	Ratings	Total
Nationals	4568	9128	13696

Observatory 2009*	Officers	Ratings	Total	
Nationals	3642	6234	9876	72.00%
Non nationals EU	665	1458	2123	16.00%
Non EU	261	1436	1697	12.00%
Total	4568	9128	13696	

*National Observatory for seafarers' employment

2. NATIONAL MERCHANT FLEET

Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	65	5469
Bulk carriers	2	345
Container ships	24	1741
General Cargo	20	72
Passenger ships	55	175
Total	166	7802

- Ministry of Transport 1st Jan 2011 – *Ships of GT 100 and over, tugs, dredgers not included.*

Type	Number	1000 dwt
Tankers	70	
Bulk carriers	3	
Container ships	25	
General Cargo	49	
Passenger ships	75	
Total	222	6369

- French Shipowner's Association Armateurs de France: 600 ships, including offshore supply vessels.

2.2 Number of controlled ships under foreign flags: **144** (dwt: 5 379 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE STRUCTURE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 4510

AB: 2450

French Shipowner's Association

Captain: 5000 - 9000

Officer: 3500 - 5500

AB: 2000 - 2500

Average salaries ashore:

Eurostat 2009

Manager: 5323

Technician: 2705

Craft worker: 1917

6. MARITIME CLUSTER:

Sectors	Number	%
Navy	50000	16.89
Marine equipment	na	0
Shipping	19500	6.59
Seaports	40000	13.51
Shipbuilding & Marine Equipment	40000	13.51
Recreational boating	40500	13.68
Offshore supply	29000	9.8
Maritime services	20100	6.79
Inland navigation	na	0
Maritime works	na	0
Coastal tourism	na	0
Cruise tourism	na	0
Fisheries	56950	19.24
Total	296050	100

Source: The French Maritime Cluster 2010

GERMANY

1. NUMBER OF SEAFARERS – 0,008% of the Population (81 802 260)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO	3997	6356	10353
ETF*	6600	2800	9400
FLOTTEN KOMANDO 2010**	4066	2701	6767
Non nationals			
ETF*	1900	3000	4900
FLOTTEN KOMANDO 2010**	2152	5376	7528

*Based on German Social Assurance System & BAA 2009

** *Fakten und Zahlen zur maritimen Abhängigkeit der Bundesrepublik Deutschland, Jahresbericht 2010. (FK)*
The report specifies that there are no figures available on German seafarers signed on foreign vessels.

1.2 Details by department on board

	Nationals	Non nationals	Total
Officers			
Deck	2636	1189	3825
Engine	1430	963	2393
Ratings			
Deck	965	2530	3495
Engine	791	1281	2072
Other	945	1565	2510
Total	6767	7528	14295
<i>Trainees</i>	<i>678</i>	<i>10</i>	<i>688</i>

FlottenKomando 2010

These figures are confirmed in the ETF report.

The ETF report notes a shortage of officers, particularly affecting technical officers.

1.3 Training

ETF report gives some indication on German training system and number in different training programs.

In 2009, 400 young people were under the Training Alternative program and 355 attended classes in Vocational school or Polytechnic. It is not clear to determine how many students are trained in deck or engine department.

2. NATIONAL MERCHANT FLEET

2.1 National flag

Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over) :

Type	Number	1000 dwt
Tankers	30	704
Bulk carriers	7	860
Container ships	294	15165
General Cargo	58	407
Passenger ships	30	86
Total	419	17222

- ETF report 2010 : 3371 ships over 100 tons (645 First register, 474 ISR,)
- FK 2010 : 1065 (624 First register, 441 ISR)

2.2. Number of controlled ships under foreign flags:

- ISL SSMR 2010 (ships of 1000GT and over) : 3 271 (dwt : 109 938 000)
- ETF report 2010: **99** under foreign flag, **2599** bare boat.
- FK 2010: **103** foreign flags, 2823 bare boat.

The German shipowners' Association reports at the end of 2009 that the German merchant fleet consisted of **3 548** vessels, without details on flags. 900 ships are under command, of which 243 are container ships.

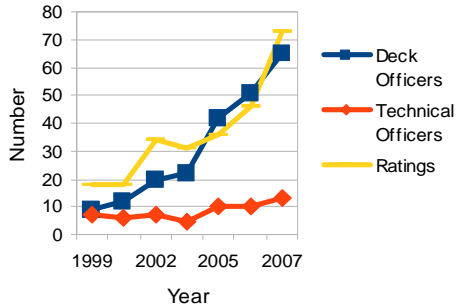
3. WOMEN EMPLOYMENT

	Nationals	Percentage of total	Non Nationals	Percentage of total
Officers				
Deck	82	3,10	16	1,34
Engine	14	0,98	3	0,30
Ratings				
Deck	24	2,48	12	0,47
Engine	17	2,15	8	0,62
Other	221	23,38	40	2,55
Total	358	5,30	79	1,09
Trainees	49	7,23	0	-

Source: FlottenKomando 2010

The *ETF – Statistic on seafarer employment (Nathan Lillie 2010)* shows the following table:

Number of Female Seafarers



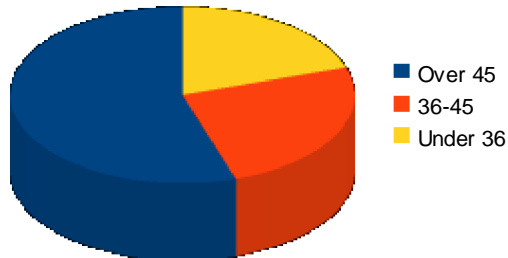
There is no information available on women's employment conditions and equality of treatment.

4. AGE PROFILE

No information in the FK report about age profile.

The only available information found regarding age profile of German seafarers is from *ETF – Statistic on seafarer employment (Nathan Lillie 2010)* and is given for deck officers only as follows (the scheme is adapted from Hoffman report (2004) and the figures are from 1995) :

Age Profile for Deck Officer, 1995



5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 4960
AB: 1900

ETF

Average monthly wages in 2009 (no precision about gross or net earning):

Deck rating: 3372-3975
Deck officer: 4100-4442
Captain: 5755-6233
Technical officer: 4100-4442 (from collective agreement)

Average salaries ashore:

Eurostat 2009

Manager: 6434
Technician: 3651

Craft worker: 2519

Other sources:

Mean Gross yearly earning in Euros:

Worker in the industry: 43940

French Social Security report 2010

Data Engineer: 48870

Mechanical Engineer: 40633

Pay Scale 2010

6. MARITIME CLUSTER:

Sectors	Number	%
Navy	24559	8.55
Marine equipment	72000	25.06
Shipping	11072	3.85
Seaports	7500	2.61
Shipbuilding	23600	8.22
Recreational boating	15602	5.43
Offshore supply	17220	5.99
Maritime services	13720	4.78
Inland navigation	9075	3.16
Maritime works	3150	1.1
Coastal tourism	70385	24.5
Cruise tourism	2963	1.03
Fisheries	16409	5.71
Total	287255	100

Source: *ETF – Statistic on seafarer employment (Nathan Lillie 2010)*
Policy Research Corporation.

The report notes: "The numbers issued by PRC are of dubious reliability. Some are clearly drawn from older sources such as ECOTEC (2006), which makes them at least 4 years old. They do not appear to include employment in the shipping company offices, for example (maritime services in the ECOTEC report cover the public sector, but the PRC report claims to include also private sector firms). However, the figures are sufficient to give a rough sense of the economic importance of the maritime cluster."

GREECE

1. NUMBER OF SEAFARERS – 0, 13% of the Population (11 305 120)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	9993	2970	12963
National Stat Bureau 2006	6821	8028	14849
Non nationals			
National Stat Bureau 2006	511	6166	6677

	Nationals	Non nationals	Total
Officers			
Deck	3316	289	3605
Engine	3055	220	3275
Catering	450	2	452
Ratings			
Deck	3375	2868	6243
Engine	1347	1999	3346
Catering	3306	1299	4605
Total	14849	6677	21526
<i>Trainees</i>	<i>1139</i>	<i>120</i>	<i>1259</i>

Source: National Statistics Bureau 2006

Training

According to the national Greek Statistics Bureau, the number of cadets in 2006 was:

Under Greek flag:

Deck: 700 nationals, 56 foreigners

Engine: 439 nationals, 64 foreigners

Under foreign flags:

Deck: 49 nationals, 7 foreigners

Engine: 19 nationals, 7 foreigners

2. NATIONAL MERCHANT FLEET

2.1 Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt

Tankers	403	45333
Bulk carriers	262	22415
Container ships	34	2456
General Cargo	67	275
Passenger ships	123	308
Total	889	70787

- Greek National Statistics Services (ships of GT 100), May 2009 : 2106, of which:
620 Dry cargo ships
547 Tankers
939 Passenger ships

2.2 Number of controlled ships under foreign flags: 2376 (dwt: 131 855 000)
ISL SSMR 2010 (ships of 1000GT and over)

According to the Review of Maritime Transport (2009), Greece has the **second greatest number of controlled fleet in the world** (15, 33%) of the world total. 69% of Greek controlled ships are registered under foreign flags (mainly Liberia, Malta and Panama).

According to Greek Shipowner's Association, Greek owned tonnage held the second position internationally, amounted to 2974 vessels. 748 new ships were on order at the end of 2009.

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 6890

AB: 2650

Greek survey

Captain: 10073 - 11458

Officer: 5283 - 6250

AB: 3000 - 3300

Average salaries ashore:

Eurostat 2009

Manager: 3502

Technician: 1911

Craft worker: 1755

6. MARITIME CLUSTER:

Sectors	Number	%
Navy	na	0
Marine equipment	3281	1.19
Shipping	41961	15.23
Seaports	na	0
Shipbuilding	3174	1.15
Recreational boating	4270	1.55
Offshore supply	na	0
Maritime services	9961	3.62
Inland navigation	na	0
Maritime works	na	0
Coastal tourism	212878	77.26
Cruise tourism	na	0
Fisheries	na	0
Total	275525	100

Source: ECOTEC 2006

IRELAND

1. NUMBER OF SEAFARERS – 0, 07% of the Population (4 467 850)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	1510	1602	3112
Non nationals			
			na

2. NATIONAL MERCHANT FLEET

2.1 Number of ships registered in the country including second register: 16

No details available

ISL SSMR 2010 (ships of 1000GT and over)

2.2 Number of controlled ships under foreign flags: **21** (dwt: 88 000)

ISL SSMR 2010 (ships of 1000GT and over)

The Irish Shipowner's Association estimates in 2010 the number of owned managed and operated ships by Irish shipping companies at **232** vessels.

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 3710

AB: 1650

Average salaries ashore:

Eurostat 2009

Manager: 5469

Technician: 4102

Craft worker: 3430

6. MARITIME CLUSTER:

Sectors	Number	%
Navy	na	0
Marine equipment	na	0
Shipping	700	9.31
Seaports	1958	26.05

Shipbuilding	na	0
Recreational boating	800	10.64
Offshore supply	na	0
Maritime services	210	2.79
Inland navigation	na	0
Maritime works	12	0.16
Coastal tourism	3836	51.04
Cruise tourism	na	0
Fisheries	na	0
Total	7516	100

Source ECOTECH 2006

ITALY

1. NUMBER OF SEAFARERS – 0,035% of the Population (60 340 330)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	9560	11390	20950
Confitarma 2010			21700*
Non nationals			
Confitarma 2010			13690

*Including EU seafarers other than Italian.

Shipowners' Association **Confitarma** reports for the year 2009 a total of **49500** seafarers employed under Italian flag, covering **35390** on board positions.

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	263	9091
Bulk carriers	80	5952
Container ships	22	1086
General Cargo	119	1607
Passenger ships	183	765
Total	667	18501

- According to Confitarma report 2010 (figures 2009), the total number of ships under Italian flag was **1570**, of which 768 of a GT over 1000 and 802 under.

2.2 Number of controlled ships under foreign flags: 20 (dwt: 6 271 000)

ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 4530

AB: 2750

Average salaries ashore:

Eurostat 2009

Manager: 5985

Technician: 2679

Craft worker: 1856

6. MARITIME CLUSTER

Sectors	Number	%
Navy	na	0
Marine equipment	na	0
Shipping	26300	21.49
Seaports	26048	21.28
Shipbuilding	12033	9.83
Recreational boating	11719	9.58
Offshore supply	na	0
Maritime services	na	0
Inland navigation	na	0
Maritime works	na	0
Coastal tourism	na	0
Cruise tourism	na	0
Fisheries	46286	37.82
Total	122386	100

Source: Italian Maritime Cluster – Federazione del mare report 2004 (last report available on the website)

The report gives an additional total number of 211224 jobs linked upstream and downstream with the sectors in the table above.

LATVIA

1. NUMBER OF SEAFARERS – 0, 5% of the Population (2 348 370)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	5509	2383	7892
Latvian Seamen Registry 2010	5509	6273	11782
Non nationals			
			na

Nationals:

Officers	5509
Deck	2437
Engine	3072
Catering	
Ratings	6273
Deck	na
Engine	na
Catering	na
Total	11782

Source: Latvian Seamen Registry 2010

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register: 5
ISL SSMR 2010 (ships of 1000GT and over)

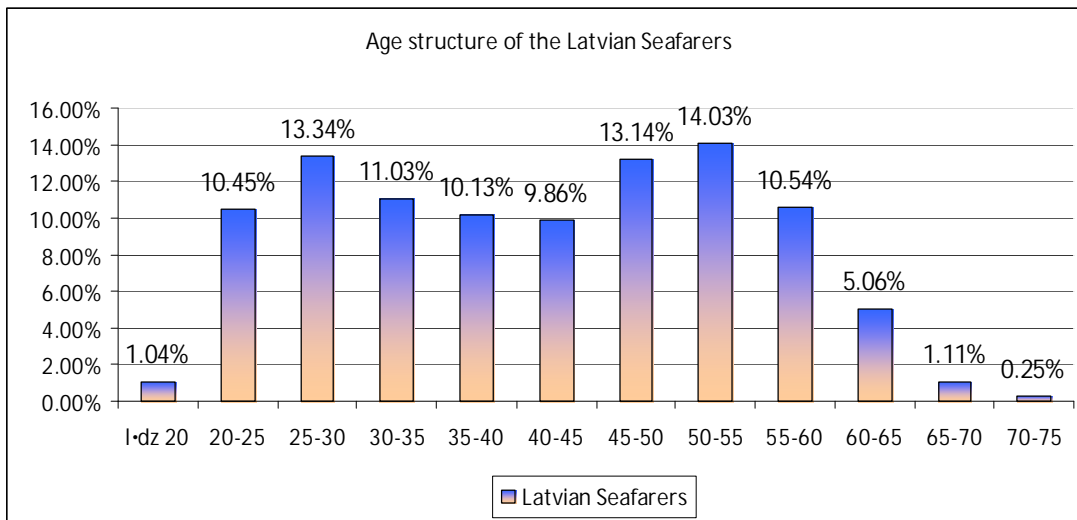
2.2 Number of controlled ships under foreign flags: 82 (dwt: 1 329 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

Table next page on the age structure of Latvian seafarers.



Source: SKEMA - 7th Frame Programme 2011

5. WAGES ELEMENT

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 4240
AB: 1500

Companies survey

Captain: 5780 - 8000
Officer: 2250 - 2550
AB: 1230 - 1240

Other elements

	Tankers	General cargo ships	Difference in salaries on tankers/cargo ships	Average salary
Masters	\$11,360.00	\$8,250.00	38%	\$9,805.00
Chief Officers	\$8,870.00	\$5,855.00	51%	\$7,362.50
2nd Officers	\$4,300.00	\$4,085.00	5%	\$4,192.50
3rd Officers	\$3,650.00	\$3,220.00	13%	\$3,435.00
Chief Engineers	\$10,850.00	\$7,800.00	39%	\$9,325.00
2nd Engineers	\$8,875.00	\$5,810.00	53%	\$7,342.50
3rd Engineers	\$4,300.00	\$4,085.00	5%	\$4,192.50
4th Engineers	\$3,650.00	\$3,200.00	14%	\$3,425.00
Reef. Engineers	-	\$3,200.00		\$3,200.00
Gas Engineers	\$6,000.00	-		\$6,000.00
Electrical engineers	\$5,700.00	\$4,900.00	16%	\$5,300.00
Ratings	\$1,762.50	\$1,768.00	0%	\$1,765.25

Source: SKEMA – 7th Frame Programme 2011.

Average salaries ashore:

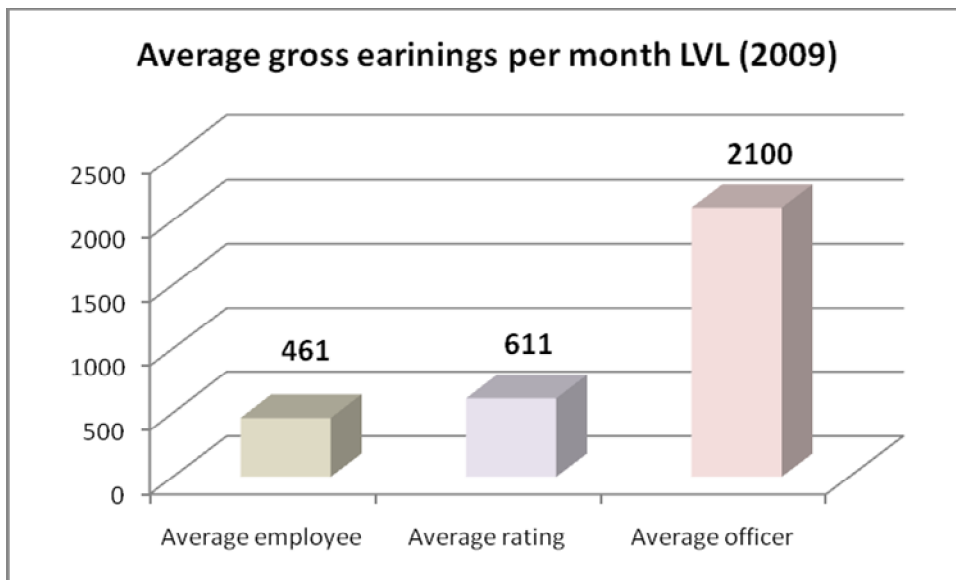
Eurostat 2009

Manager: 911

Technician: 601

Craft worker: 413

Comparison elements between shore worker salary in Latvian and seafarers:



Source: SKEMA - 7th Frame Programme 2011

6. MARITIME CLUSTER

Sectors	Number	%
Navy	na	0
Marine equipment	1435	2.37
Shipping	18842	31.07
Seaports	11046	18.22
Shipbuilding	2542	4.19
Recreational boating	491	0.81
Offshore supply	na	0
Maritime services	3243	5.35
Inland navigation	na	0
Maritime works	1700	2.8
Coastal tourism	21336	35.19
Cruise tourism	na	0
Fisheries	na	0
Total	60635	100

Source: ECOTEC 2006

LITHUANIA

1. NUMBER OF SEAFARERS – 0, 20% of the Population (3 329 040)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	2916	2479	5395
Lithuanian MSA 2011	3083	3584	6667
Non nationals			
Lithuanian MSA 2011	49	50	99

Lithuanian Maritime Shipping Administration (2011):

	Nationals	Non nationals	Total
Officers			
Deck	1579	20	1599
Engine	1504	29	1533
Total	3083	49	3132
Ratings			
Deck	2018	35	2053
Engine	554	15	569
Other	1012		1012
Total	3584	50	6766

Lithuanian Maritime Shipping Administration (2011)

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register: 33
No details available

2.2 Number of controlled ships under foreign flags: 27 (dwt: 108 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

	Deck	Engine	Catering & Other	Total
Officers	2			2
Ratings	5			5
<i>Total</i>	7	0	0	7

Lithuanian Maritime Shipping Administration (2011)

4. AGE PROFILE

	< 25	25 - 35	35 - 45	45 - 55	> 55	Total
Officers	98	715	684	989	597	3083
%	3.18	23.19	22.19	32.08	19.36	
Ratings	412	589	359	647	565	2572
%	16.02	22.9	13.96	25.16	21.97	
<i>Total</i>	510	1304	1043	1636	1162	

Lithuanian Maritime Shipping Administration (2011)

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: na

AB: na

Average salaries ashore:

Eurostat 2009

Manager: 956

Technician: 551

Craft worker: na

6. MARITIME CLUSTER:

Sectors	Number	%
Navy	644	2.08
Marine equipment	na	
Shipping	11832	38.14
Seaports	2730	8.8
Shipbuilding	4902	15.8
Recreational boating	130	0.42
Offshore supply	3514	11.33
Maritime services	1738	5.6
Inland navigation	na	
Maritime works	1426	4.6
Coastal tourism	4105	13.23
Cruise tourism	na	
Fisheries	na	
Total	31021	100

Source: ECOTECH 2006

LUXEMBOURG

1. NUMBER OF SEAFARERS – 0, 88% of the Population (502 500)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	2272	2164	4436
Non nationals			
			na

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	20	261
Bulk carriers	4	192
Container ships	10	237
General Cargo	13	125
Passenger ships	3	2
Total	50	817

- According to Maritime Cluster Website, **210** ships were registered under Luxembourg flag as at 1st January 2010.

2.2 Number of controlled ships under foreign flags: 16 (dwt: 1 098 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 3980

AB: 2000

Average salaries ashore:

Eurostat 2009

Manager: 7688

Technician: 4304

Craft worker: 2499

6. MARITIME CLUSTER

Information about maritime cluster in Luxembourg are from year 2000 in the ECOTEC report and gives only 130 jobs in maritime services and 1700 for shipping. The Luxembourg Maritime Cluster has no employment figures available.

MALTA

1. NUMBER OF SEAFARERS – 0, 58% of the Population (412 970)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	274	2162	2436
Non nationals			
			na

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register:

Type	Number	1000 dwt
Tankers	447	22263
Bulk carriers	521	29596
Container ships	91	3343
General Cargo	440	3675
Passenger ships	66	235
Total	1565	59112

ISL SSMR 2010 (ships of 1000GT and over)

2.2 Number of controlled ships under foreign flags: na

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENT

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 1300

AB: 330

Average salaries ashore:

Eurostat 2009

Manager: 2278

Technician: 1456

Craft worker: na

6. MARITIME CLUSTER

na

NETHERLANDS

1. NUMBER OF SEAFARERS – 0,013% of the Population (16 574 990)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	3014	560	3574
NMC*	1700	530	2230
Non nationals			
EU*	980	340	1320
Non EU*	1750	7850	9600

*Nederlandse Maritime Cluster 2009 – In addition, the NMC takes into account a total of 8610 “non maritime personnel” on board Dutch ships.

1.2 Training

According to the NMC, 540 Dutch, 20 EU and 180 non EU cadets were on board Dutch ships in 2009.

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register: 830

Type	Number	1000 dwt
Tankers	94	1008
Bulk carriers	3	195
Container ships	73	1632
General Cargo	627	4969
Passenger ships	33	201
Total	830	8005

ISL SSMR 2010 (ships of 1000GT and over)

2.2 Number of controlled ships under foreign flag: 190 (dwt: 2 757 000)

ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENT

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 3980

AB: 2000

Average salaries ashore:

Eurostat 2009

Manager: 4365

Technician: 3253

Craft worker: 2499

6. MARITIME CLUSTER:

Most recent figures in ECOTEC 2006 study are from 2002.

Sectors	Number	%
Navy	16110	7.41
Marine equipment	13500	6.21
Shipping	19850	9.13
Seaports	26750	12.3
Shipbuilding	10270	4.72
Recreational boating	15130	6.96
Offshore supply	19080	8.78
Maritime services	9560	4.4
Inland navigation	na	0
Maritime works	5170	2.38
Coastal tourism	81990	37.71
Cruise tourism	na	0
Fisheries	na	0
Total	217410	100

Source: ECOTEC 2006 – Figures from 2002 except for Marine equipment and Coastal tourism 2005.

NORWAY

1.1 NUMBER OF SEAFARERS – 0, 48% of the Population (4 858 200)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	16082	7300	23382
NIA*	6922	10694	17616
Non nationals			
NIA*	2109	2277	4386

*National Insurance Administration

Note from the Norwegian administration (Seafarers working and living conditions Unit): Figures for non nationals are given only for foreign seafarers domiciled in the EEA. Therefore, seafarers employed under NIS registry living outside this area is not included (mostly from Asia, South America and East Europe).

1.2 Details by department on board

	Nationals	Non nationals	Total
Officers			
Deck	4588	1122	5710
Engine	2334	987	3321
Total	6922	2109	9031
Ratings			
Deck	4588	676	2564
Engine	1167	546	1713
Dual purpose	210	28	238
Catering	4710	1027	5737
Total	10694	2277	12971

Source: National Insurance Administration

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	255	11707
Bulk carriers	56	4124
Container ships	1	7
General Cargo	226	3367
Passenger ships	119	116
Total	657	19321

- According to the Norwegian Shipowners' Association, as at 1st January 2010, 844 ships were registered under Norwegian first register, 584 under NIS and 408 under a foreign flag.

2.2 Number of controlled ships under foreign flags: 926 (dwt: 26 612 000)
 ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

In percentage

	Deck	Engine	Dual purpose	Catering & Other
Officers	1,53%	0,69		
Ratings	4,34	1,29	3,37	42,1

Source: National Insurance Administration

4. AGE PROFILE

	< 25	25 - 39	40 - 49	50 - 59	> 60	Total
Officers	207	2211	1634	1793	1085	6930
%	2,99	31,9	23,58	25,87	15,66	
Ratings	2231	3211	2296	2283	665	10686
%	2,99	31,9	23,58	25,87	15,66	
Total	2438	5422	3930	4076	1750	
%	2,99	31,9	23,58	25,87	15,66	

Source: National Insurance Administration

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 4190

AB: 2100

Average salaries ashore:

Eurostat 2009

Manager: 6385

Technician: 4742

Craft worker: 3644

6. MARITIME CLUSTER

Sectors	Number	%
Navy	na	0
Marine equipment	25220	26
Shipping	28130	29
Seaports	na	0
Shipbuilding	20370	21

Recreational boating	na	0
Offshore supply	na	0
Maritime services	23280	24
Inland navigation	na	0
Maritime works	na	0
Coastal tourism	na	0
Cruise tourism	na	0
Fisheries	na	0
Total	97000	100

SOURCE: Maritime Forum (The Norwegian Maritime Cluster) 2007

POLAND

1. NUMBER OF SEAFARERS – 0, 10% of the Population (38 167 330)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	17923	4746	22669
Ministry of Transports*			40000
DREWRY PAL 2009	20000	10000	30000
Non nationals			
			na

*The Polish Ministry of Transports estimates that 40000 Polish seafarers are employed around the world (information from Polish crewing agencies). Only 31 (Thirty one) Polish seafarers are employed under Polish flag in April 2011. Polish Shipowners' Association gives a number of approximately 4900 seafarers employed by Polish ship-owners.

1.2 Training

According to the report for Poland of ETF project "Seafarer recruitment and training in Europe" (Nathan Lillie 2010), 2115 students in navigation were in the Polish maritime academies (Gdynia and Szczecin) in 2008. The total number of graduates for the same year is of 338.

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register: 9
ISL SSMR 2010 (ships of 1000GT and over)
No details available

2.2 Number of controlled ships under foreign flag: 103 (dwt: 2 681 000)
ISL SSMR 2010 (ships of 1000GT and over)

According to Polish Shipowners' Association, **146** ships were controlled by Polish companies as of 1st January 2010, of which 18 were under Polish flag.

3. WOMEN EMPLOYMENT

The report for Poland of ETF project "Seafarer recruitment and training in Europe" (Nathan Lillie 2010) quotes a study (Belcher) dating 2003 finding that of the 12165 Polish seafaring union members, 96 were women (less than 0, 8%).

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

Dreary 2010 (Includes vacation, granted overtime and bonus)

Captain: 4900 - 14000
Officer: 1960 - 5250
AB: 1260 - 1400

Average salaries ashore:

Eurostat 2009

Manager: 1743
Technician: 818
Craft worker: 607

6. MARITIME CLUSTER

Sectors	Number	%
Navy	16000	8
Marine equipment	80000	40.02
Shipping	35000	17.51
Seaports	9727	4.87
Shipbuilding	18700	9.36
Recreational boating	3000	1.5
Offshore supply	475	0.24
Maritime services	3185	1.59
Inland navigation	na	0
Maritime works	303	0.15
Coastal tourism	33500	16.76
Cruise tourism	na	0
Fisheries	na	0
Total	199890	100

Source: ECOTEC 2006 – Some figures from 2003

Policy Research Corporation estimates that Polish maritime cluster employed **147 000** persons in 2008.

PORTUGAL

1. NUMBER OF SEAFARERS - 0, 02% of the Population (10 737 710)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	419	1802	2221
Non nationals			
			na

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register:

Type	Number	1000 dwt
Tankers	33	682
Bulk carriers	8	120
Container ships	8	81
General Cargo	48	258
Passenger ships	18	45
Total	115	1186

ISL SSMR 2010 (ships of 1000GT and over)

2.2 Number of controlled ships under foreign flag: 14 (dwt: 779 000)

ISL SSMR 2010 (ships of 1000GT and over)

According to the Portuguese Shipowners' Association, **36** ships were flying the Portuguese flag at the beginning of 2010 (13 under first register, 23 under second register, Madeira International Register) and **16** ships were controlled under third flag.

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENT

Monthly gross wages (in Euros)

No information available on seafarers' wages

Average salaries ashore:

Eurostat 2009

Manager: 3471

Technician: 1712

Craft worker: 803

6. MARITIME CLUSTER

There is no identified maritime cluster in Portugal.

Sectors	Number	%
Navy	14745	22.28
Marine equipment	na	0
Shipping	3206	4.84
Seaports	na	0
Shipbuilding	4336	6.55
Recreational boating	2480	3.75
Offshore supply	na	0
Maritime services	2002	3.03
Inland navigation	na	0
Maritime works	509	0.77
Coastal tourism	38894	58.78
Cruise tourism	na	0
Fisheries	na	0
Total	66172	100

Source: ECOTECH 2006 – Most of figures from 2003

ROMANIA

1. NUMBER OF SEAFARERS – 0, 14% of the Population (21 462 200)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	18575	5768	24343
Ministry of Transport	21391	9291	30682
Non nationals			
			na

Romanian Ministry of Transport and Infrastructure (04/2011):

TOTAL Seaman's books	27415	19859	7556
MASTER	1643	1512	131
CHIEF MATE	2082	1545	537
CHIEF ENGINEER	1619	1480	139
SECOND MARITIME ENGINEER OFFICER	1826	1273	553
CHIEF ELECTRICIAN	289	225	64
MANAGERIAL	7459	6035	1424
DECK OFFICER	3981	2196	1785
ENGINEER OFFICER	9003	5200	3803
ELECTRICIAN OFFICER	948	774	174
OPERATIONAL	13932	8170	5762
DECK CADET OFFICER	3427	2461	966
ENGINEER CADET OFFICER	1447	936	511
ELECTRICIAN CADET OFFICER	411	293	118
CADETS	5285	3690	1595
OFFICERS	26676	17895	8781
RATINGS+MARITIME PORTS OFF.	9291	7090	2201

TOTAL CERTIFICATES	35967	24985	10982
AUXILIARYS	5027	2435	2592

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register: 9
ISL SSMR 2010 (ships of 1000GT and over)

No details available

2.2 Number of controlled ships under foreign flag: 34 (dwt: 640 000)
ISL SSMR 2010 (ships of 1000GT and over)

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

Drewry 2010 (Includes vacation, granted overtime and bonus)

Captain: 4200 - 12250

Officer: 2100 - 4200

AB: 700 - 1400

Average salaries ashore:

Eurostat 2009

Manager: 926

Technician: 388

Craft worker: 299

6. MARITIME CLUSTER:

No identified maritime cluster.

Romania was no covered by ECOTEC 2006

SPAIN

1. NUMBER OF SEAFARERS – 0,015% of the Population (45 989 020)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	3181	3862	7043
Non nationals			
			na

2. NATIONAL MERCHANT FLEET

2.1 Number of ships registered in the country including second register:

- ISL SSMR 2010 (ships of 1000GT and over)

Type	Number	1000 dwt
Tankers	42	1856
Bulk carriers	7	35
Container ships	9	85
General Cargo	40	202
Passenger ships	42	107
Harbour & Offshore		
Others		
Total	140	2285

- Spanish shipowners' Association ANAVE 2010: 149 (GT 23 09 000).

2.2 Number of controlled ships under foreign flag:

- ISL SSMR 2010 (ships of 1000GT and over) : 138 (dwt : 3 344 000)
- ANAVE : **247**

Type	Number
Tankers	39
Bulk carriers	10
Container ships	13
General Cargo	70
Passenger ships	69
Total	247

3. WOMEN EMPLOYMENT

na

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 2650

AB: 1500

Drewry 2008 (Includes vacation, granted overtime and bonus)

Captain: 5400 - 11000

Average salaries ashore:

Eurostat 2009

Manager: 4315

Technician: 2271

Craft worker: 1569

6. MARITIME CLUSTER

Sectors	Number	%
Navy	na	0
Marine equipment	14523	0.83
Shipping	8000	0.46
Seaports	35000	1.99
Shipbuilding	5419	0.31
Recreational boating	25240	1.44
Offshore supply	na	0
Maritime services	1562	0.09
Inland navigation	na	0
Maritime works	742	0.04
Coastal tourism	1665234	94.85
Cruise tourism	na	0
Fisheries	na	0
Total	1755720	100

Source: ECOTEC 2006.

Some figures older than 2006. Number of employment in the coastal tourism sector is a broad estimation as no studies have been carried out regarding this sector.

SWEDEN

1. NUMBER OF SEAFARERS – 0, 08% of the Population (9 340 680)

	Officers	Ratings	Total
Nationals			
ISF/BIMCO 2010	5958	4965	10923
Swedish official statistics Bureau	3324	4340	7664
Non nationals			
Swedish official statistics Bureau	638	1817	2455

Swedish Official Statistics Bureau:

	Nationals	Non nationals	Total
Officers			
Deck	1818	240	2058
Engine	1176	255	1431
Hotel	330	143	473
Total	3324	638	3962
Ratings			
Deck	1724	585	2309
Engine	714	227	941
Hotel	1902	1005	2907
Total	4340	1817	6157

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register:

Type	Number	1000 dwt
Tankers	43	590
Bulk carriers	4	19
Container ships		
General Cargo	74	1218
Passenger ships	42	199
Total	163	2026

ISL SSMR 2010 (ships of 1000GT and over)

2.2 Number of controlled ships under foreign flags: 376 *Swedish Transports Agency*

The Swedish Transport Agency indicates on January 1st 2010 a number of **242** ships over GT 300 under Swedish flag, and **376** controlled ships flying foreign flags (in decreasing order: Bermuda, NIS, UK and Denmark)

3. WOMEN EMPLOYMENT

	Number	% of total seafarers
Nationals	1438	18,80
Non nationals	583	23,75

Swedish Official Statistics Bureau – Nationals and non nationals.

	Officers	% of total seafarers*	Ratings	% of total seafarers*
Deck	58	2,80	161	7,00
Engine	18	1,25	14	1,50
Hotel	197	41,65	1573	54,10
Total	273	6,90	1748	28,40

Swedish Official Statistics Bureau – Nationals and non nationals.

**Nationals and non nationals*

4. AGE PROFILE

na

5. WAGES ELEMENTS

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 3800

AB: 2320

Average salaries ashore:

Eurostat 2009

Manager: 5054

Technician: 3351

Craft worker: 2595

6. MARITIME CLUSTER

Sectors	Number	%
Navy	5670	5.22
Marine equipment	na	0
Shipping	14000	12.9
Seaports	6500	5.99
Shipbuilding	2635	2.43
Recreational boating	5000	4.61
Offshore supply	1300	1.2
Maritime services	2401	2.21
Inland navigation	na	0

Maritime works	35	0.03
Coastal tourism	71023	65.42
Cruise tourism	na	0
Fisheries	na	0
Total	108564	100

Source: ECOTEC 2006 – Figures from 2002 to 2005

UK

1. NUMBER OF SEAFARERS – 0, 04% of the Population (62 008 050)

	Officers	Ratings	Total
<i>Nationals</i>			
ISF/BIMCO	14657	8536	23193
UK Statistics*	14620	11340	25960
<i>Non Nationals</i>			
EU*			5265**
Non EU*			7298**

*UK Statistics Department 2010

**Number of seafarers holding a British Certificate equivalent of competency. Therefore, these figures doesn't reflect necessary the number of active non nationals seafarers on UK ships.

UK Statistics Department 2010:

Officers	
Deck	6020
Engine	5250
Technical	1460
Hotel	1890
Total	14620
Ratings	
Deck	3220
Engine	1000
Other	7110
Total	11340
<i>Trainees</i>	1830

1.2 Training

During the year 2010, 1830 cadets were embarked on UK ships; the number of new entrants in Maritime Academies was 754

2. National Merchant Fleet

2.1 Number of ships registered in the country including second register:

Type	Number	1000 dwt
Tankers	278	14665
Bulk carriers	72	7559
Container ships	198	9476
General Cargo	192	1784
Passenger ships	79	335
Total	819	33819

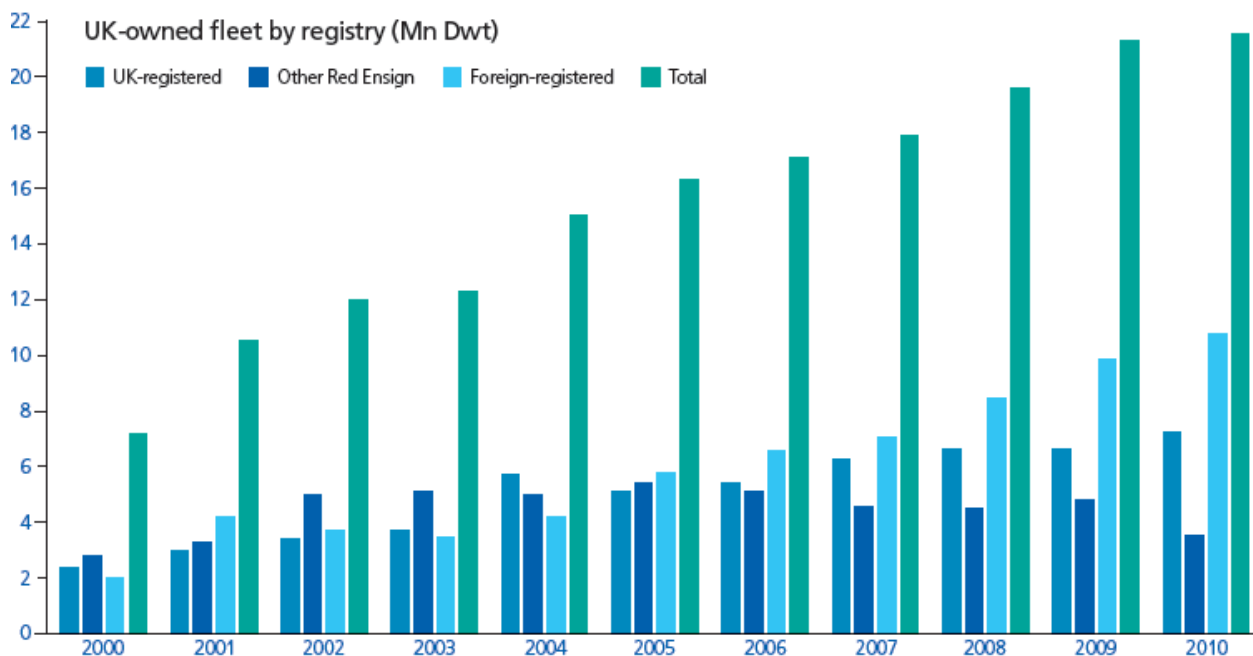
Source: ISL 2010

2.2 Number of controlled ships under foreign flags: 374 (dwt: 22 452 000)

Source: ISL 2010

- According to the UK Chamber of Shipping report 2010, 912 ships were registered under UK flag in 2010. This figure probably includes ships under all Red Ensign registries.

The table below is extracted from the UK CoS report 2010.



Source: UK CoS report 2010

3. WOMEN EMPLOYMENT

In percentage of total national seafarers: 31, 5%

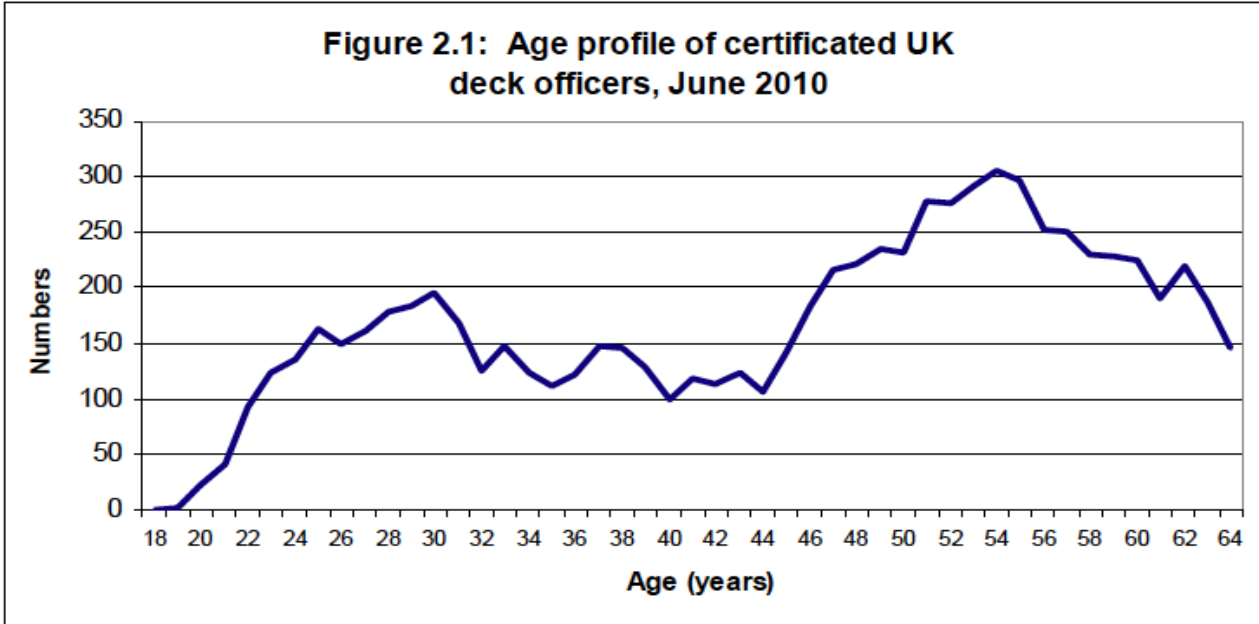
	Deck	Engine	Hotel
Officers	2,2	0,6	36,6
Ratings	1,1	0	41,1

UK Statistics Department 2010

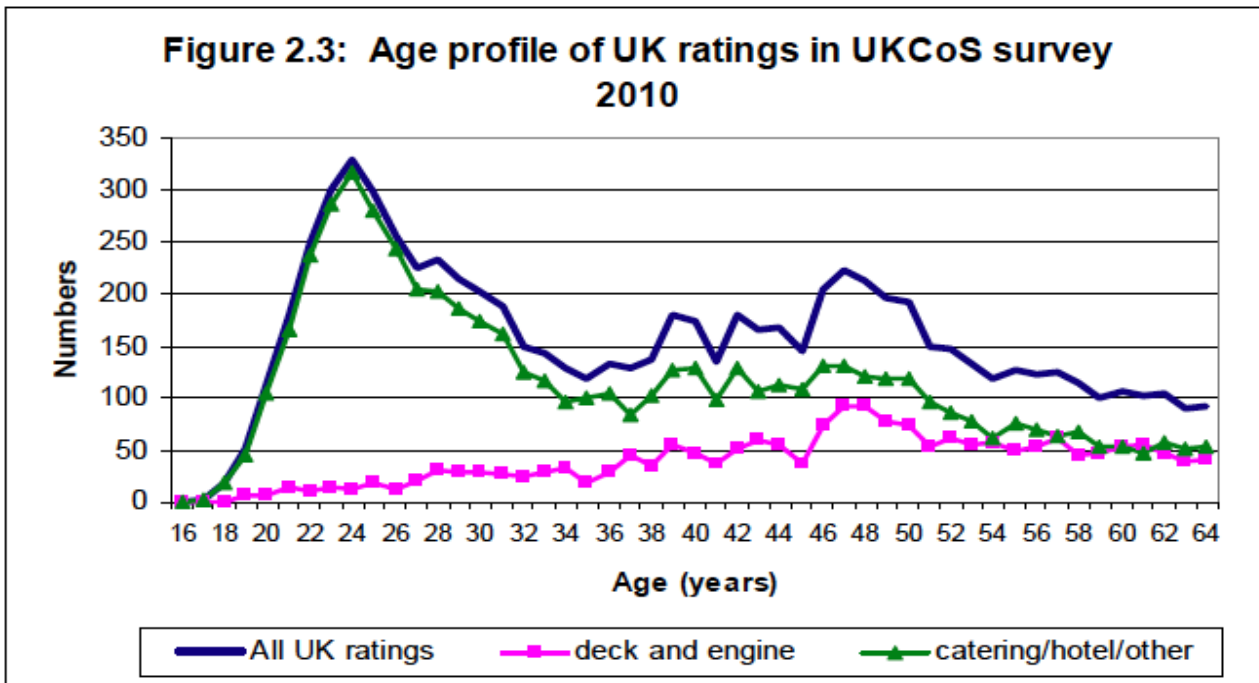
4. AGE PROFILE

Officers	<25	25-35	35-45	45-55	>55
Deck	219	849	517	816	642
Engine	184	638	390	793	686
Hotel	80	459	370	299	137
Technical	20	240	354	448	270
Total	503	2186	1631	2356	1735
% of Total	6,00	26,00	19,40	28,00	20,60

Ratings	<25	25-35	35-45	45-55	>55
Deck	54	207	348	543	296
Engine	13	35	68	102	57
Hotel	1173	1708	970	894	374
Other	7	93	136	185	71
Total	1247	2043	1522	1724	798
% of total	17,00	27,85	20,75	23,50	10,90



Source: UK seafarers statistics 2010



5. WAGES ELEMENT

Monthly gross wages (in Euros)

ECORYS 2009

Officer: 3710

AB: 1650

Drewry 2010 (Includes vacation, granted overtime and bonus)

Captain: 10000 - 14000

Officer: 3700 - 6300

AB: 3700 - 4450

Average salaries ashore:

Eurostat 2009

Manager: 6013

Technician: 3887

Craft worker: 3187

6. MARITIME CLUSTER

Sectors	Number	%
Navy	61500	10.99
Marine equipment	na	0
Shipping	26250	4.69
Seaports	42150	7.53
Shipbuilding	24000	4.29
Recreational boating	28605	5.11
Offshore supply	30000	5.36
Maritime services	27402	4.9
Inland navigation	na	0
Maritime works	na	0
Coastal tourism	319859	57.14
Cruise tourism	na	0
Fisheries	na	0
Total	559766	100

Source: ECOTEC 2006

The English Maritime Cluster “**Maritime UK**” gives a number of around **500 000** jobs in the maritime sectors.

A study carried out in 2009 by **Oxford Economics** “*Economic contribution of the UK shipping industry*” estimated the number of jobs related to shipping industry at **212 000**.

7. ANNEXES

ANNEX A

EUROPEAN FLEETS (plus Norway)

EUROPEAN FLEETS (Total number of ships by flag)					
Number of ships at 1 st January 2010					
National flags including second registers					
	ISF/BIMCO*	ECSA** GT>100	ISL *** GT>1000	UNCTAD****	
				GT>1000	GT>100
BELGIUM	99	182	79	85	246
BULGARIA	67	116	39	na	na
CYPRUS	855	1058	828	129	1026
DENMARK	409	639	376	360	490
ESTONIA	35	89	na	na	na
FINLAND	176	270	93	na	na
FRANCE	299	591	166	180	165
GERMANY	663	854	419	458	948
GREECE	1305	1552	889	741	1517
IRISH REPUBLIC	49	86	na	na	na
ITALY	990	1522	667	608	1635
LATVIA	33	67	na	na	na
LITHUANIA	58	78	na	na	na
LUXEMBOURG	106	125	50	na	na
MALTA	1552	1674	1565	na	1613
NETHERLANDS	827	1192	830	na	1332
NORWAY	1181	1656	657	820	560
POLAND	72	173	na	na	na
PORTUGAL	64	244	115	na	na
ROMANIA	34	138	na	na	na
SLOVANIA	na		na	na	na
SLOVAKIA	na	37	na	na	na
SPAIN	229	552	140	173	
SWEDEN	356	463	163	136	
UK	944	1409	819	357	1697
TOTAL	10403	14767	7895	4047	11229

Sources

*ISF/BIMCO 2010 : based on IHS-Fairplay

**ECSA : Clarkson

***ISL 2010 : based on IHS-Fairplay

****UNCTAD report 2010 : based on IHS-Fairplay for the 35 first flags of registration with the largest dwt

ANNEX B

CONTROLLED FLEET

(Attributable to parent companies indicating country of controlling interest)

Ships of 1000gt and over

COUNTRY	TANKERS	BULK	CONTAINER	GENERAL	PASSENGER	TOTAL
BELGIUM	26	8	10	42		103
BULGARIA						na
CYPRUS						134
DENMARK	189	76	135	106		573
ESTONIA						77
FINLAND	8			19		51
FRANCE		22	72	16		144
GERMANY	412	294	1476	1040	31	3271
GREECE	749	1056	160	252	6	2376
IRISH REPUBLIC						na
ITALY	71	8		49		209
LATVIA						82
LITHUANIA						27
LUXEMBOURG						16
MALTA						na
NETHERLANDS		8				190
NORWAY	220	103	23	434		926
POLAND						103
PORTUGAL		3				14
ROMANIA						34
SLOVANIA						25
SLOVAKIA						na
SPAIN	37	12	7	35	13	138
SWEDEN	76			57	3	191
UK		28				374
TOTAL	1788	1618	1883	2050	53	7392

Source: ISL 2010

ANNEX C

NEWBUILDINGS ON ORDER

NEWBUILDINGS ON ORDER AS AT MAY 2010 – ECSA							
	DRY CARGO	CONTAINER	TANKER	BULK	RO-RO	PASSENGER	TOTAL
BELGIUM	4		15	33	3		55
BULGARIA				7			7
CYPRUS	34	25	18	29			106
DENMARK	44	55	67	100	1	1	268
ESTONIA						2	2
FINLAND				1			1
FRANCE		50	5	37		6	98
GERMANY	293	184	92	219	13	6	807
GREECE	1	13	198	340	32	4	588
IRISH REPUBLIC	8						8
ITALY	11		65	68	20	15	179
LATVIA	1		5				6
LITHUANIA							0
LUXEMBOURG							0
MALTA							0
NETHERLANDS	177	22	44	23	1		267
NORWAY	26		66	16	32	10	150
POLAND				19			19
PORTUGAL	1		3	3			7
ROMANIA							0
SLOVANIA							0
SLOVAKIA							0
SPAIN	1		1	1			3
SWEDEN	1		16			4	21
UK	18	2	27	40	9	6	102
TOTAL	620	351	622	936	111	54	2694

NEWBUILDINGS ON ORDER AS AT JUNE 2010 – ISL							
TOTAL EU + Norway	668	387	605	1030		43	2733

Source: ECSA & ISL 2010

The number of new buildings on order by shipping companies doesn't reflect the number of ships which will be registered under EU flags when delivered.

ANNEX D

EU FLEET DEVELOPMENT

EU Fleet development from 2006 up to mid 2010 – Ships of GT 300 and over																		
	TOTAL			TANKERS			BULK			CONTAINER			GENERAL CARGO			PASSENGER		
	2006	2010	growth	2006	2010	growth	2006	2010	growth	2006	2010	growth	2006	2010	growth	2006	2010	growth
REGISTRED FLEET	7669	8370	2,2	1825	2263	5,5	1163	1247	1,8	932	1103	4,3	2469	2461	-0,1	1280	1296	0,3
<i>% SHARE WORLD TOTAL</i>		17,7			18,2			16,2			22,2			13,7			30,9	
CONTROLLED FLEET	9824	11614	4,3	2293	3061	7,5	1845	2080	3,0	1709	2460	9,5	3271	3285	0,1	706	728	0,8
<i>% SHARE WORLD TOTAL</i>		31,1			30,5			28,4			52,8			24,9			32,7	

Source: ISL 2010

ANNEXE E

QUESTIONNAIRE

The questionnaire (next page) was sent to the national administrations of the following countries:

Belgium	:	info@mobilit.fgov.be
Bulgaria	:	bma@marad.bg
Cyprus	:	seafarers@dms.mcw.gov.cy
Denmark	:	kfs@dma.dk
Estonia	:	eva@vta.ee
Finland	:	merimiesksikko@trafi.fi
Ireland	:	maritimetransport@transport.ie
Italia	:	segreteria.dsis@mit.gov.it
Latvia	:	laima.rituma@sam.gov.lv
Lithuania	:	msa@msa.lt
Malta	:	info.tm@transport.gov.mt
Norway	:	post@sjofartsidr.no
Poland	:	dsieminska@mi.gov.pl
Romania	:	relpub@mt.ro
Sweden	:	jan.ostlund@sika-institute.se

Returns from (May 18th, 2011):

Bulgaria – completed with available information
Lithuania – completed with available information
Romania – completed with available information
Norway – completed with available information
Poland – by telephone
Sweden – by telephone

COUNTRY:

Data collected for Year:

1.1 NUMBER OF SEAFARERS:

Total number of active seafarers (including back up for Nationals)

	National flag ships*					Foreign flags controlled ships**	
	Deck	Engine	Dual Purpose	Catering & Others	Total	EU flags	Non EU flags
Nationals							
Officers							
Ratings							
<i>Total</i>							
Non Nationals							
Officers							
Ratings							
<i>Total</i>							

**Including second register if any*

***Number of national seafarers employed on foreign flags ships controlled by national companies*

1.2 Estimated numbers or percentage of national seafarers employed on Intra EU Traffics only:

Officers:

Ratings:

2. WOMEN EMPLOYMENT

National seafarers only; In figures or percentage

	Deck	Engine	Dual Purpose	Catering & Others
Officers				
Ratings				
<i>Total</i>				

3. AGE PROFILE

National seafarers only; In figures or percentage

	<25	25-35	35-45	45-55	>55
Officers					
Ratings					

Note:

Please note that rough figures are acceptable for the purpose of the study.

If some data are not available, thank you to note down "na" in the corresponding box.

If there is in your country a website where this information is in all or partly available in English Language, please indicate the address hereafter:

WWW.

Your name and position:

Your telephone and email address:

Thank you for completing this questionnaire.