MARITIME UK

Annual Review 2018



Royal HaskoningDHV
Enhancing Society Together

Developing smart maritime solutions today for a more sustainable tomorrow



Royal HaskoningDHV is one of Europe's leading independent consultancy service providers specialising in maritime engineering and environmental consultancy services.

We are renowned for our technical excellence in developing, designing and delivering innovative and sustainable maritime solutions that transform your ambitions into reality.

Contact
T: + 44 (0)1444 476 668
E: Ben.Challier@rhdhv.com

royalhaskoningdhv.co.uk

MARITIME UK

Published in association with Maritime UK by
Compass Handbooks Ltd

Publisher
Andy Bullen
Editorial
Felicity Landon
Carly Fields
Ben Murray
Production Editor
Linda Roast
Cartographer
Mark Terrey
Photography
Andrew Sassoli-Walker
A&P Group
ASV Global
Associated British Ports
Baltic Exchange
Cammell Laird
Forth Ports
Fleetwood Nautical College
Hutchison Ports (UK) Limited
Inmarsat
Jeff Brown
Lloyd's Register - Eduardo Lisanve
DP World London Gateway
Maritime UK
Peel Ports
Pendennis
Rolls Royce
Rupert Peace
Southampton Boat Show
Spirit Yachts
Trinity House
UKSR Services
Print
Swallowtail Print

The opinions expressed are not necessarily those of the publisher, Maritime UK, nor any other organisation associated with this publication.
No liability can be accepted for inaccuracies of any description, although the publishers would be pleased to receive amendments for possible inclusion in future editions.
No part of this publication may be reproduced or transmitted in any form or by any means, including photocopying or scanning, without the prior permission of the publishers.
Such written permission must also be obtained before any part of the publication is stored in a retrieval system of any nature.

October 2018
ISSN 2631-3235
©2018 Compass Handbooks Ltd



Compass Handbooks Ltd
Wistaria House
15 Bexwell Road
Downham Market
Norfolk PE38 9LH, UK
Tel: + 44 (0)1366 858367
www.compass-publications.co.uk

Introduction Maritime UK Patron HRH The Princess Royal *Page 3*
Introduction David Dingle, CBE *Page 5*
Ministerial support for Maritime UK Nustrat Ghani MP, Robert Jentrick MP *Page 7*
Maritime UK's strategic objectives *Page 9*

Raising the profile of the sector *Page 11*
Maritime is big business *Page 13*
Crafting and delivering a compelling message *Page 17*
One voice at the heart of government *Page 21*

Promoting the sector overseas and international collaboration *Page 23*
The UK's maritime offer *Page 25*
Promoting the offer *Page 27*
Spotlight: Shanghai Trade Mission *Page 29*
Spotlight: Southampton Boat Show *Page 31*
Spotlight: London International Shipping Week *Page 33*
Maritime UK activity overseas *Page 35*
Spotlight: Maritime Commonwealth *Page 37*

Collaborating to drive innovation *Page 39*
Strengthening links with academia *Page 41*
Sector Deal *Page 43*
MarRI-UK: a new UK centre for maritime research and innovation *Page 45*
A blueprint for the future *Page 47*

Ensuring the skills to fuel maritime ambition *Page 49*
Setting the direction of travel *Page 51*
Jobs galore, at sea and ashore *Page 55*
The human element? People are much more than that! *Page 57*
Women in Maritime *Page 59*
Year of Engineering *Page 63*
Apprenticeships *Page 67*
Spotlight: Jack Lawson, Trinity House apprentice *Page 69*
Spotlight: Abbie Jones, Associated British Ports apprentice *Page 71*
Spotlight: Mac Bierowiec, Seadub apprentice *Page 73*
Spotlight: Scott Arrowsmith, SMS Towage apprentice *Page 75*

Realising the coastal powerhouse *Page 77*
Reimagining coastal communities *Page 79*
Bringing the UK's maritime regions together *Page 81*
Maritime UK Industry Awards *Page 83*
Joining the dots *Page 85*
Clusters: Scotland, Mersey and Solent *Page 87*

State of the industries *Page 89*
Shipping *Page 91*
UK Chamber of Shipping *Page 91*
Cruise Lines International Association *Page 93*
Nautilus *Page 95*
Trinity House *Page 97*
Ports *Page 99*
British Ports Association *Page 99*
UK Major Ports Group *Page 101*
Services *Page 103*
Institute of Chartered Shipbrokers *Page 103*
Maritime London *Page 105*
The Baltic Exchange *Page 107*
Engineering *Page 109*
Society of Maritime Industries *Page 109*
Leisure Marine *Page 111*
British Marine *Page 111*

Membership and sponsorship *Page 113*

Membership Directory *Page 115*
Advertisers index *Page 120*

1 2 3 4 5 6 7 8

Maritime & Coastguard Agency

UK Ship Register

The UK Ship Register

A quality flag for quality owners

CUSTOMER SERVICE QUALITY FLEXIBILITY REPUTATION



Email: ukshipregister@mcga.gov.uk
Telephone: +44 (0)20 3817 2461
Website: www.ukshipregister.co.uk

BUCKINGHAM PALACE

As Britain is a maritime nation, its maritime sector is most important to prosperity and national life. It enables 95% of UK global trade, linking our island to people across the world.

I was pleased to become Patron of Maritime UK at the end of 2017. Having been associated with a number of maritime organisations across the UK, I am delighted to be able to support Maritime UK's mission to bring the various parts of the maritime sector together. Encouraging our maritime industries to collaborate will enable them to achieve more than by working alone.

I welcome the opportunity to support the skills of those involved in the maritime sector and was pleased to open Southampton Solent University's new £6 million campus for Merchant Navy Officer Cadets' education and training in January this year. I also support Maritime UK's Women in Maritime Taskforce, which is showing leadership in addressing diversity.

With the International Maritime Organization resolving to reduce carbon emissions from shipping by 50% by 2050, there is an opportunity for the sector to innovate solutions that will have a global market. Collaboration is key to success, and I look forward to the UK sector playing its part. I also welcome Maritime UK's focus on international promotion and look forward to supporting a trade mission to Chile later this year. I was pleased that Maritime UK was involved in the Commonwealth Business Forum during the Commonwealth Heads of Government Meeting in London in April.

Maritime is a truly national sector and has the ability to give hope and opportunity to our coastal communities. Maritime UK's focus on regional growth is welcome and the Southampton Boat Show is an important part of raising awareness of the leisure marine which is a significant part of our national life, and the opportunity to get on the water should be strongly encouraged.

Real progress is being made and I look forward to being involved in Maritime UK's developments in the future.



ABP
www.abports.co.uk

Our network of 21 ports provide access to international markets for UK manufacturers, driving trade and growth.

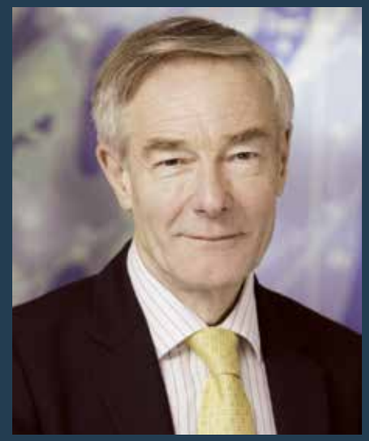
KEEPING BRITAIN TRADING

Supporting 119,000 jobs

Generating £7.5bn for the UK economy

Investing £857 million in the UK

Handling around 100m tonnes of cargo



Welcome to the first Maritime UK Annual Review. I hope you find the publication useful, and one that provides opportunity to engage further with our cross-sector programmes and initiatives. As ever, if you have any questions or suggestions, do get in touch with the team.

Since taking the chair in September 2015, much has been achieved. Today, Maritime UK is a completely different organisation and community to the one that it was. And the sector is all the better for it.

Then, Maritime UK was a loose grouping of maritime bodies in the shipping, ports and maritime services industries, mainly focused on agreeing broadly joint policy positions.

Today, we are the sector's umbrella organisation, with the engineering and leisure marine industries joining our ranks. We are also proud to include a trade union, charity partner and regional organisations amongst our number.

Now, we are running our own programmes and coordinating activity on behalf of the sector in wide-ranging areas. We are government's primary interlocutor for the sector, and partner with departments to deliver activity in support of our joint objectives. More than talking, now, we do.

My overriding feeling when reflecting on the past three years is how exciting the period has been. There's been a real energy around our National Council table, and a real support from members, companies and government. Everyone wins from greater collaboration; partners recognise that and as a result put more effort into joint working.

With particular thanks to the Department for Transport, maritime issues are now more fully understood in government, and more than that, we are now more readily seen as a partner to realise government's objectives.

This annual review would not have been possible without those companies that have supported our programmes and advertised in this publication. I thank you for your support.

The following pages highlight work across Maritime UK's strategic objectives, covering policy and politics, international promotion, partnership with government, skills and regional cluster development. You will see that much has been achieved, but in making that progress we always identify more to do. As we enter the next stage of our journey, we've got to determine how we take our joint work to the next level.

Over the coming months, Maritime UK will be shaping its future organisational and strategic strategy. The voice of government and individual companies should be heard in those discussions, and we invite you to let us know your thoughts.

Together, we've built firm foundations. The future is bright for Maritime UK and the maritime sector, and we invite you to be part of the next stage of our development.

Enjoy reading the review, and then let's get to work.

Mr David Dingle CBE
Maritime UK Chairman

Baltic Exchange

Indices
Forward curves
Dispute resolution
Escrow services
Global networking
Education

balticexchange.com

Lifeboats

WHEN THE CREW LAUNCH, YOUR GIFT GOES WITH THEM

Every rescue depends on the generosity of people like you who choose to remember the RNLI in their Will.
A legacy gift lives on, making incredible feats of bravery possible. We will ensure that every gift is used where the need is greatest to deliver our lifesaving service.

A legacy to the RNLI will be more than a gift in your Will. It will save lives at sea.

Photo: RNLI/Nigel Millard

If you would like to find out more about helping the RNLI's courageous crews with a gift in your Will, please visit **RNLI.org/legacy**, call the Gifts in Wills Team on **0300 300 0124** or email **legacy_enquiry@rnli.org.uk**

YOUR LEGACY IS OUR LIFELINE

Royal National Lifeboat Institution (RNLI), a charity registered in England and Wales (209603) and Scotland (SC037736). Regisitered charity number 20003326 in the Republic of Ireland

UK-PORTS.ORG



The reliable guide to UK ports

- Daily News Feed
- Information sourced directly from the ports
- In depth information with new features



The UK maritime sector is one of our nation's greatest success stories. It continues to grow from strength to strength adding high quality jobs, driving innovation and boosting exports. A central pillar of this success is the strong partnership between the UK maritime sector and government, and Maritime UK is at the very heart of this. Since becoming Minister for Maritime I have seen first-hand the breadth and depth of work of the Maritime UK team, and this annual report highlights recent achievements of which they should be proud.

Our partnership with Maritime UK has contributed over the last 12 months to major positive change in the maritime sector. This included my announcement earlier this year to double the funding for officer cadet training known as SMarT Plus. This is a massive boost to training the next generation of British seafarers and will see their numbers increase to 1,200 a year. The increase in funding is a clear demonstration of this Government's commitment to our maritime industries and would not have been possible to introduce without the evidence provided by Maritime UK and its members.

I am particularly proud to work with Maritime UK to increase the number of women in the maritime sector. Only 3% of UK ship's officers are women, yet they make up half the potential workforce. To ensure that the sector realises its potential it must draw on all the talent available to it. It is great to see Maritime UK taking action on this issue through the establishment of the Women in Maritime Taskforce and the development of the pledge and Charter. I look forward to working with the taskforce over the next year to encourage more women into exciting maritime careers.

SMarT Plus and improving the gender balance both share a common theme, namely preparing our maritime sector to be ready to seize the opportunities and meet the challenges of the future. To ensure that we remain a leading maritime nation we must be ready to adapt and change. Through this Government's forthcoming Maritime 2050 strategy, which is being developed with significant input from Maritime UK, we will set a clear and ambitious vision for the future of the sector. This will enable maritime businesses to plan for the long term and think strategically about how they will respond to future global and market trends. Maritime 2050 is a once in a generation opportunity and I look forward to working with Maritime UK and its members to build a stronger, even more dynamic and innovative maritime sector.

Maritime UK's annual review is a testament to the organisation's success over the past 12 months. It is great for government to have such an active and dedicated partner to work with and I look forward to deepening our partnership over the next year as we work together to grow and promote our world class maritime industries."

Nusrat Ghani MP
Parliamentary Under Secretary of State for Transport and Minister for Maritime



HM Treasury recognises the value of the maritime sector, and the important contribution it makes to the UK economy. We are working closely with industry through Maritime UK and other stake-holders to support maritime growth. I was pleased to recently hear from the sector about its priorities.

As we leave the European Union, the maritime sector is well placed to help position Britain as a productive, outward-looking and global-trading nation. I look forward to continuing our work with this industry to help deliver our ambition of being a world-leading maritime nation.

Robert Jenrick MP
Exchequer Secretary to the Treasury

Brookes Bell Group



UK +44 (0)151 236 0083
Shanghai +86 21 5860 2868
Hong Kong +852 2358 4794
Singapore +65 6539 0540
www.brookesbell.com



Raising the profile of the sector Page 11
Promoting the sector overseas and international collaboration Page 23
Collaborating to drive innovation Page 39
Ensuring the skills to fuel maritime ambition Page 49
Realising the coastal powerhouse Page 77

Raising the profile of the sector

The sector recognises that it needs to raise its profile. The various components of the sector add up to more, create a more compelling case for support, and can point to a greater contribution, as a single strong sector. Maritime UK is raising the sector's profile by:

- Commissioning independent research on the role and value of the sector
- Creating compelling messages about what the sector needs and why government should deliver support
- Delivering the maritime message at the heart of government
- Coordinating events to shine a spotlight on the sector.

Maritime is big business **13**
Crafting and delivering a compelling message **17**
One voice at the heart of government **21**

Located on the south coast close to international shipping lanes and less than 100 miles from mainland Europe, Southampton is one the UK's leading ports.



Maritime is big business

Exceeding comparable industries, maritime helps to raise billions of pounds each year for the UK.

Associated British Ports Hull Container Terminal at Queen Elizabeth Dock serving two vessels into the night.

Taken as a whole, the footprint represented by Maritime UK is one of Britain's biggest industries. Maritime UK biannually commissions independent and robust economic data on the value of the maritime sector. The Centre for Economics and Business Research (Cebr), a leading economic consultancy in the UK, published the most recent report at the end of 2017.

The report found that:

■ The maritime sector makes a substantive macroeconomic contribution to the UK turnover, Gross Value Added (GVA), employment and the compensation of employees. It is estimated that the sector directly supported just over £40 billion in business turnover, £14.5 billion in GVA and 185,700 jobs for UK employees in 2015. The marine and shipping industries are the largest constituent industries in terms of economic activity, contributing £6.5 billion and £4.3 billion in GVA respectively, and directly supporting around 99,500 jobs and 50,800 jobs respectively in 2015.

■ The substantial direct economic contribution of the maritime sector exceeds those of other comparable industries. For example, the sector's direct turnover contribution of just over £40 billion compares to £31.1 billion from the entire aerospace industry in 2015; similarly, the sector's direct GVA contribution of £14.5 billion compares favourably to £10.0 billion from the aerospace industry.

■ The direct contribution of the maritime sector through turnover, GVA and employment has increased since 2010, when turnover, GVA and employment are estimated to have been £35.5 billion, £13.6 billion and 178,800 jobs respectively. Average productivity in the maritime sector – as measured through the GVA generated by each job – exceeds that of the national average. Average productivity in each maritime industry also exceeded the national average in each year from 2010 to 2015.

■ The maritime sector also helped to raise billions of pounds each year to the UK Exchequer and made a sizeable contribution to UK trade through exports of goods and services. The sector

MGS scorecard... Industry progress against Maritime Growth Study

DfT produced a review of delivery against the MGS recommendations.

"The review showed a strong improvement of collaboration between government and industry. The structures created within both, especially the rebadged and enhanced Maritime UK have contributed much to the building of this relationship. Industry has particularly welcomed the increased exposure to ministers and the accompanying officials' forums. Maritime UK has become acknowledged as the lead organisation for the promotion of the sector as a whole.

"The formation of Maritime UK as a single promotional voice was very largely supported as benefitting the sector.

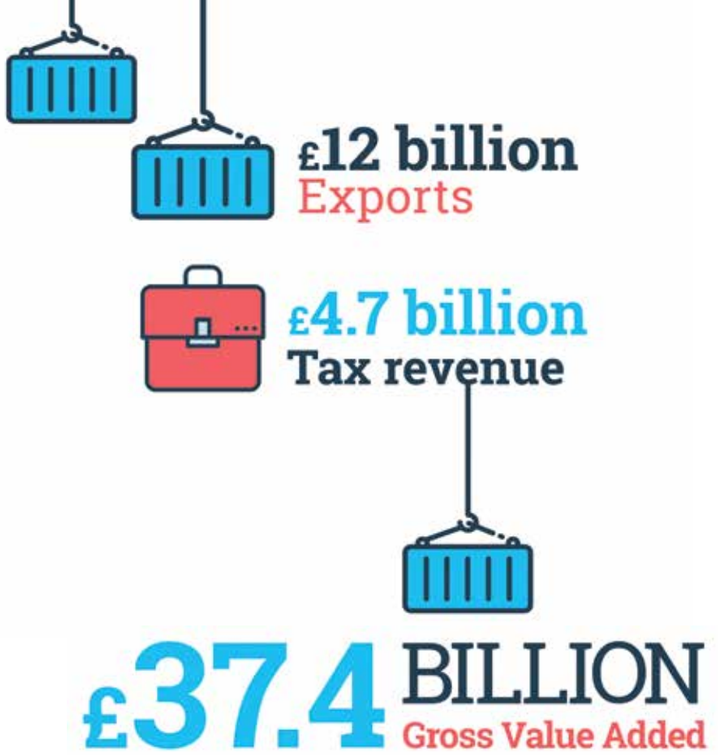
"Implementation of the recommendations dealing with the setting up of a single promotional body for industry with the necessary remit and resource to represent the sector effectively was achieved through the rebadging of Maritime UK. It was relaunched with David Dingle as the chair and has provided focus and work programmes for members to look at areas that the maritime sector needs to address in order to meet its objectives. The review found that this development has been a major contribution towards the enhanced collaboration between government and industry."

Next steps for industry

The MGS review called for:

■ Greater communication and engagement with those outside Maritime UK or London with a resulting lack of awareness about initiatives or progress.

■ Greater focus on technological innovation and its future implications.



contributed an estimated total of just under £4.7 billion in tax revenues in 2015, or 0.7% of total UK tax revenues, spread across Income Tax, NICs, VAT, Corporation Tax and Business Rates. The maritime sector exported £12 billion of goods and services in 2015, or around 2.3% of the UK total.

■ After quantifying the indirect economic impacts through the industry's supply chains and induced effects on expenditures, it is estimated that the maritime sector helped to support a total of £37.4 billion of GVA in 2015. This implies that, for every £1 in GVA directly contributed on average by the sector, a further £2.59 in GVA was generated across the UK economy.

■ These aggregate economic impacts associated with the maritime sector also extend to turnover, employment and the compensation of employees. It is estimated that the maritime sector helped to support a total of £91.9 billion in turnover, 957,300 jobs and £21.0 billion through the compensation of employees in 2015.

■ While the economic contribution of the industry is spread across all UK regions, London contributes the most to GVA and employment, both directly and more widely. In 2015, it is estimated that the industry in London directly contributed £4.3 billion of GVA (29% of the industry) and 35,800 jobs (19%). After indirect and induced effects are considered, the aggregate contribution from London rises to £8.9 billion of GVA (26%) and 236,000 jobs (28%).

Growth

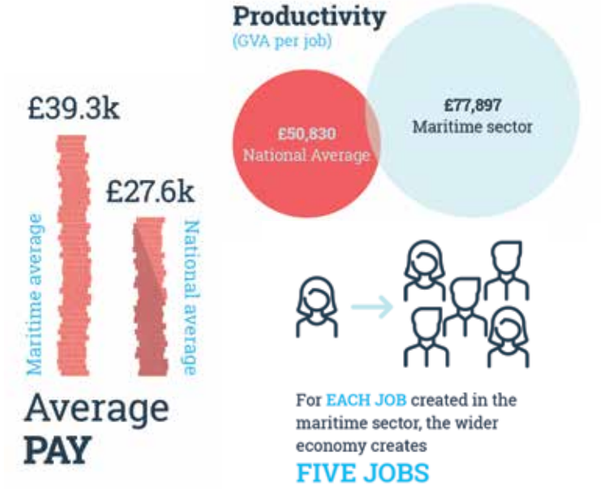
Maritime productivity, employment, turnover and contribution to GDP have increased nationwide over a five-year period, the report found.

The report, which was released to coincide with London International Shipping Week, found that over five years, the British maritime sector had experienced a 12.7% increase in turnover, 6.6% increase in GVA and 3.9% increase in employment.

It also showed that productivity per worker stood well above the UK average at £77,897, compared to £50,830, and that the sector contributes nearly £40 billion to the UK economy.

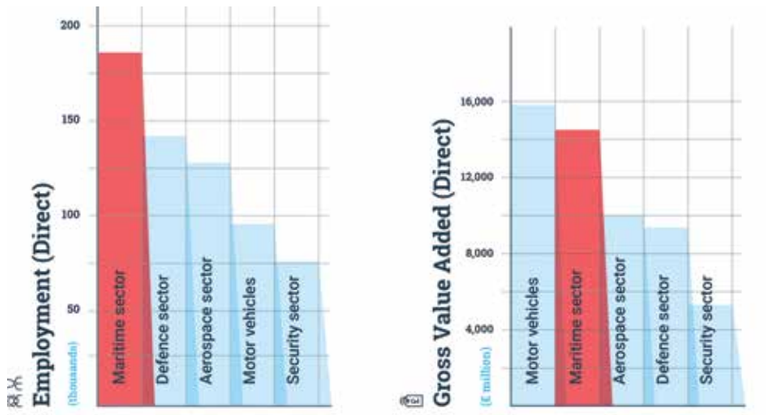
The sector continues to invest in its people, with average pay also well above the UK average at £39,300, compared to £27,600.

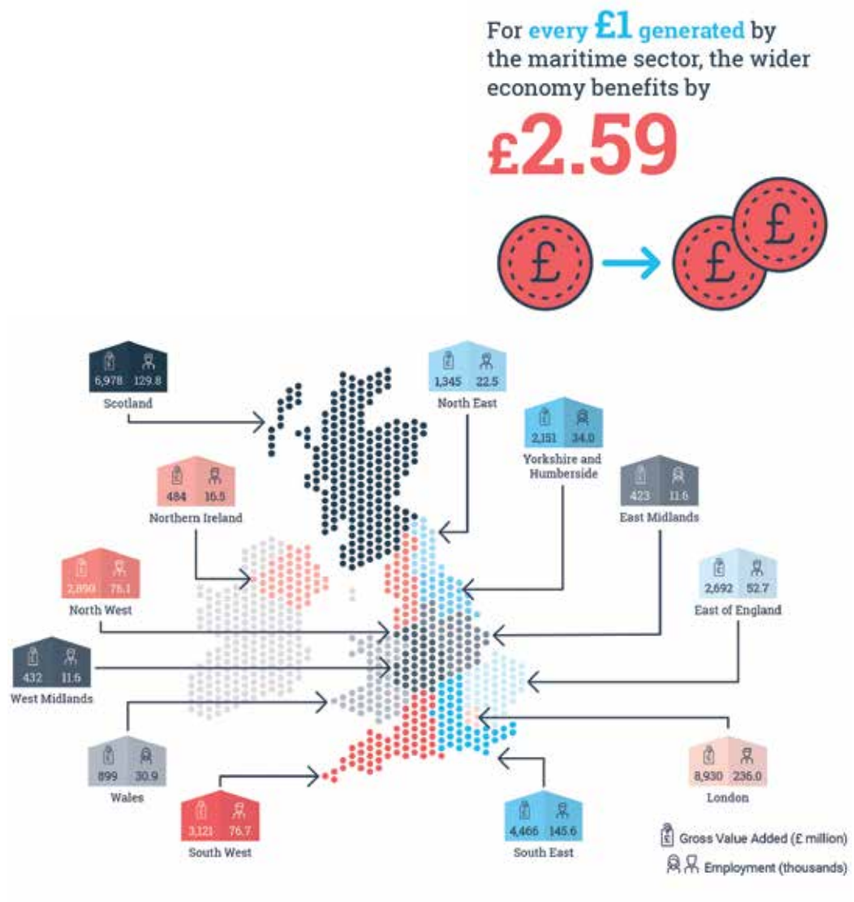
The report also provided a number of potential scenarios for the UK's departure from the European Union and the impact these would have on the maritime sector.



For EACH JOB created in the maritime sector, the wider economy creates
FIVE JOBS







Tonnage tax

The report included a section devoted to exploring the tonnage tax system's economic impact on the shipping industry. This segment used lower, middle and upper scenarios against the actual deadweight tonnage of the UK's shipping fleet (covering vessels of 500 gross tonnes or more) under the current regime — or outturn — to determine what would have happened to the UK maritime fleet if the optional tax initiative had not been brought in.

While revenues raised for the UK Exchequer from the tax option were minimal, Cebr estimated that the gains from implementing the regime, regarding economic performance, far outweighed the associated costs of deferred Corporation Tax revenues.

According to Cebr, under the lower scenario, total deadweight tonnage would have dropped as low as 6.8m tonnes by 2015, while under the middle and higher scenarios, deadweight tonnage figures would have been 3.7m and 2m tonnes respectively — against an actual 2015 outturn of 13.5m tonnes. The actual direct impact of the tonnage tax on gross value added (GVA) in 2015 was just over £4bn, while the real aggregate impact was £16bn. The lower scenario's direct impact for GVA in 2015 would have been equivalent to a loss of 0.11% of UK GDP — or the UK losing the entire direct GVA contribution from the dairy or beer manufacturing industries, or most other services incidental to water-transportation. Additionally, in 2015, the shipping industry directly supported 51,000 jobs for UK employees, but the report's middle scenario indicated that direct employment for that year would have only been 13,700 jobs — equal to a 73% decrease.

Robust evidence bases are required to convince government to effect change – research like this on tonnage tax will contribute to the development of such business cases.

Huge growth opportunities

The Government's Foresight Future of the Sea report highlighted the size and value of the maritime sector and forecast that the global maritime sector will be worth $3bn by 2030.

Both industry and government want Maritime UK to speak with a compelling and coherent voice on behalf of the sector.

Crafting and delivering a compelling message

Together, Maritime UK and its members develop joint policy positions and deliver these via lobbying, campaigns and messaging. With the organisation seeking to bring together its country's maritime sector to promote the field, drive growth and influence government, measured policy stances — formulated from input by a wide range of industry actors — is a vital and beneficial part of its activity.

Taking action on policy

Maritime UK established the Maritime UK Policy Working Group, using a workshop dynamic, to lead on the development of cross-industry policy positions. Member associations were asked to give feedback on the issues that they face, with these issues being prioritised to reach a position of alignment. During the feedback process, common themes emerged from comments from the different associations and, added to the fact that key findings were placed within the context of the UK's departure from the European Union, it was easy to identify shared areas and topics. Maritime UK thus created collaborative, sector-wide policy positions, which were first published in June 2017.

The Policy Working Group continues to meet, with a formal, face-to-face meeting held quarterly to check that the common themes and statements that it established are still relevant to Maritime UK members. Its remit is to provide Maritime UK's board with key policy issues and briefings on issues which are of concern to Maritime UK's membership as a whole. Members of the group formulate policy recommendations before delivering them to the board. Chaired by David Balston, the UK Chamber of Shipping's director of policy, the group offers members the opportunity to inform Maritime UK about the issues that they are facing through a democratic and pluralistic process.

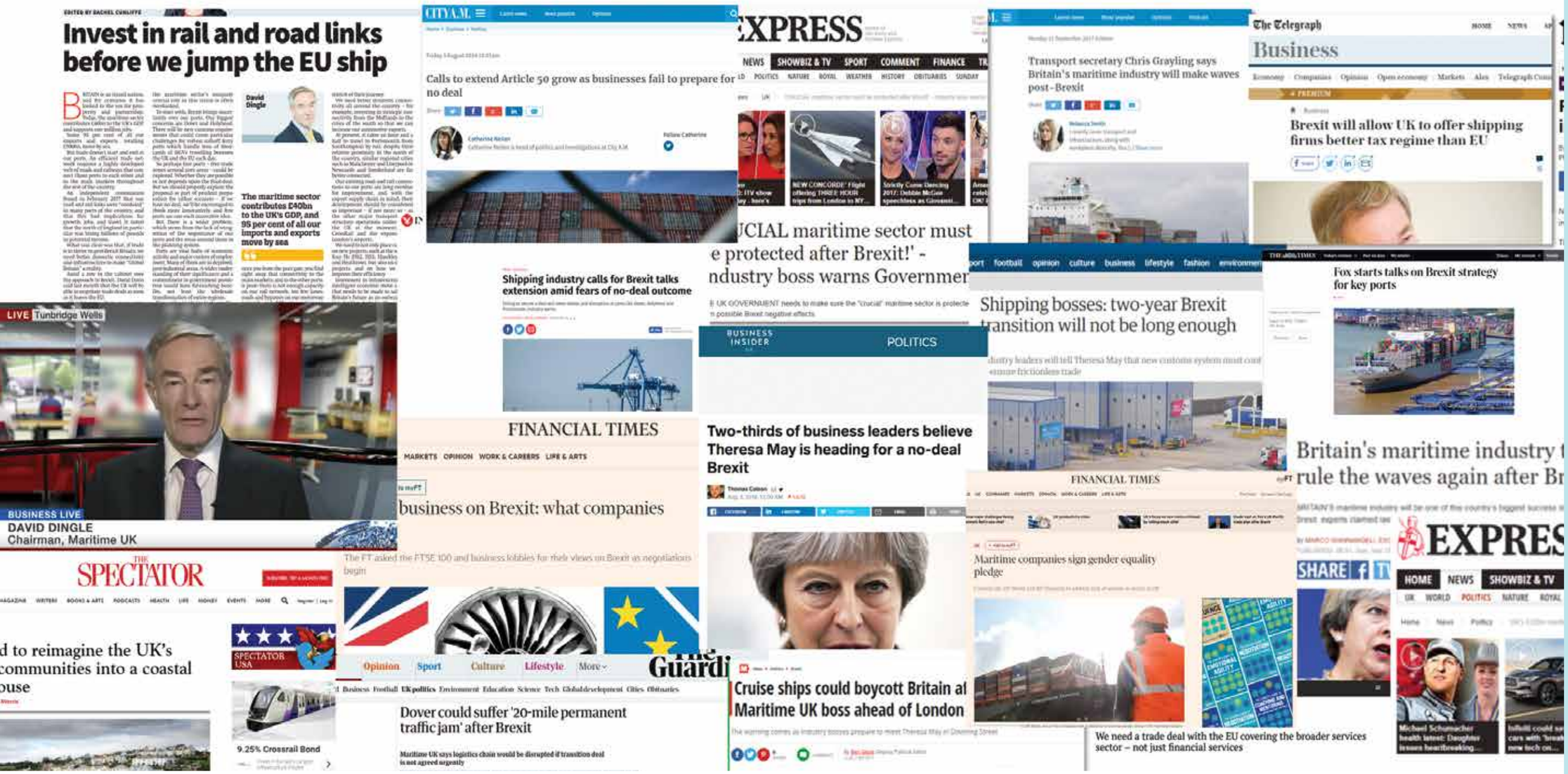
The group has other aims. One goal is to amplify existing policy positions from members where appropriate, while another is to successfully deliver activities in support of the wider objectives contained in the UK government's Maritime Growth Study.

Policy stances

Maritime UK is committed to ensuring that the UK is a competitive place to do maritime business, that the maritime sector can attract inward investment, that the UK boosts the export of its cutting-edge maritime products and services and that the maritime sector can efficiently facilitate UK global trade. Its six collaboratively formulated policy stances — agreed upon by the Policy Working

Maritime UK event at the Tory Conference.





Party conference
Maritime UK is now coordinating sector activity at party conferences. 2018's activity included a fringe event at the Conservative Party conference on the 'Coastal Powerhouse' and a private lunch at the Albert Dock during the Labour Party conference.

Group and shaping Maritime UK's Manifesto — are a reflection of these aims and, unsurprisingly, current affairs are at the heart of the standpoints.

The first, ensuring that the UK serves as an attractive business environment, offers objectives with clear relevance to Brexit, on top of discussing Brexit itself. These goals include delivering an equally favourable trading relationship to the Single Market, delivering new trade deals with the rest of the world as soon as possible to prevent tariffs being set, ensuring minimum disruption to goods and people-movement at the UK border, building a UK regulatory environment maximising the country's competitive advantage and creating a visa regime facilitating industry growth.

The second policy position is based around the theme of 'backing British'. Maritime UK believes that the UK government should deliver an ambitious industrial strategy with the maritime industry at its heart and that British businesses should be prioritised first for goods and services procurement. British jobs — including existing EU rights — should be championed, and EU funding and grants should be guaranteed after Brexit. Another goal here is to encourage more inward investment by reviewing the tonnage tax to make it more appealing.

Spending on connectivity and infrastructure encapsulates the third Maritime UK policy position. The organisation believes that the UK needs to invest in infrastructure projects that will keep it competitive, benefit all industries, help business create more jobs and deliver growth. The logistics chain should be made more robust via support for infrastructure and investment, and there should be wider recognition for port connectivity ventures across the UK. Additionally, there should be fast-tracked planning and consent regimes for port developments.

The fourth policy position covers maritime innovation. The organisation's goals under this policy standpoint are supporting the creation of a national maritime research centre, ensuring that talented students and staff within the UK maritime sector can study/work at the country's educational institutions, and providing clarity, as well as ensuring that available grants are accessible. Maritime autonomy is one of the fields of innovation featured in this policy position.

The fifth stance in the Maritime UK Manifesto is about increasing maritime exports. It focuses on the different ways that the amount of goods being shipped overseas can be boosted, arguing, for example, that a 'Team UK' approach (similar to the approach of competitor countries) should be established, and that industry and government should agree on priority export markets, aligning esources and maximising output. Ministers should lead trade missions and attend trade shows held abroad, it recommends, and there should be a bigger maritime inclusion by the UK government with promotion and communications. Another one of the stance's aims is reviewing export support for maritime vis-à-vis other sectors.

A united industry is an industry that government takes more seriously.

One voice at the heart of government

In the past year, Maritime UK, its members and supporters have successfully raised the profile of the industry and increased its influence. Work continues to ensure that the strength and breadth of the maritime sector is properly understood and its importance and needs recognised at all levels of government.

Ready to talk: Industry leaders arrive at Downing Street.



Downing Street

The sector took its message to the heart of government during London International Shipping Week.

Leading figures from across the industry visited 10 Downing Street to take part in a round table debate with government ministers. The challenges and opportunities faced by the UK's maritime sector were highlighted and discussed, and industry representatives gave their views on how the government could strengthen the country's appeal as an attractive business centre.

The round table was chaired by UK Transport Secretary Chris Grayling and was also attended by International Trade Secretary Liam Fox and the (then) Shipping Minister John Hayes. The Treasury, Department for Business, Energy and Industrial Strategy (BEIS) and DExEU were also represented.

Led by David Dingle, chairman of Maritime UK, industry representatives included shipowners and operators, and those from the ports, shipbuilding and marine, and maritime services sectors.

International shipowners who attended the meeting included Emanuele Grimaldi, Managing Director of the Grimaldi Group; Daniel Ofer, Managing Director of Zodiac Maritime; Niels Stolt-Nielsen, CEO of Stolt-Nielsen Ltd; and Dan Sten Olsson, CEO and Director of Stena AB.

"This event brought the whole of the sector together, with ministers from across the breadth of government showing the seriousness with which the government is taking maritime," says Maritime UK Director Ben Murray. "There were discussions around tonnage tax, funding for training, residency, technology, strategy and, of course, Brexit and its implications. Various work streams emerged from the discussions."

On the agenda was the SMarT Plus proposal for seafarer training, which won government support and has subsequently been approved.

There were discussions as to how a more attractive and flexible tonnage tax regime might be created. A review of the UK's tonnage tax regime is now ongoing, to consider whether it is as competitive as it could and should be, what owners want, and more detailed work is being done on ship financing and what residency rules could follow the UK leaving the European Union.

Concerns about delays at ferry ports as a consequence of Brexit were raised: "This was an opportunity to forcefully explain that the issue needs to be taken seriously," says Ben Murray.

Other topics for discussion were how connectivity between the country's ports and the hinterlands might be improved, and how the UK's industrial strategy and National Shipbuilding Strategy can be implemented effectively.

"This event was a highlight of our political engagement. It is part of our job to bring everybody together – a representative, confident group serving the interests of the sector. This also meets the government's interest in the industry being a bit more 'joined up' in its approach," says Mr Murray.

Maritime Ministerial Working Group

The Maritime Ministerial Working Group was established as a direct result of the Maritime Growth Study, its aim being to enhance collaboration across government on maritime matters. As requested in the growth study, the industry has done its bit in presenting 'one voice', and it is logical that government should do the same.

The Ministerial Working Group brings together Ministers from the Treasury, Department for International Trade, Department for Transport, Department for Exiting the European Union and Department for Environment, Food and Rural Affairs, to meet regularly with leaders from across the Maritime sector, representing shipping, ports, services, engineering and leisure marine.

The forum is used by Maritime UK and government to discuss key priorities, including how the UK is responding to the challenge of the International Maritime Organization's 50% carbon reduction target, and the opportunities for the sector that are created by this new regulation. The Ministerial Working Group is chaired by the Maritime Minister.

Just as the industry and politicians can benefit from a 'joined-up' approach, so can civil servants. A new Maritime Strategy Committee coordinated by Maritime UK and the DfT has brought together government officials, to discuss and report on maritime topics and strategy.

Maritime UK has stepped up political engagement with parliamentarians and ministers including roundtables with BEIS and Treasury ministers.

Meetings have also been held with key members of the Opposition, including Shadow International Trade Secretary Barry Gardiner and Hilary Benn, Chair of the Exiting the European Union Select Committee. A shadow Maritime Ministerial Working Group is planned.

A week to shine a spotlight on the sector

Maritime UK Week is an opportunity to shine a spotlight on the maritime sector, its role and future. A week packed with events across the breadth of the sector and length of the country is planned. The week will be held every two years in the off-year from London International Shipping Week.

Promoting the sector overseas and international collaboration

Maritime UK acts to promote the UK's maritime offer to overseas customers and investors. It works to ensure appropriate government support for the export of products and services, and seeks international collaboration to further these aims.

The UK's maritime offer **25**
Promoting the offer **27**
Spotlight: Shanghai Trade Mission **29**
Spotlight: Southampton Boat Show **31**
Spotlight: London International Shipping Week **33**
Maritime UK activity overseas **35**
Spotlight: Commonwealth **37**

Minister Ghani on a trade mission trip to China with representatives of Cosco Shipping.



The UK is a leading, outward-looking global trading maritime nation.

The UK's maritime offer

The UK is the world's maritime centre and we are proud to offer a unique and complete package for maritime business.

With cutting-edge technology, high-quality design & manufacturing, unparalleled expertise in services and major investment opportunities, the UK is the natural home for your maritime business.

Cutting-edge technology

The Global Innovation Index ranks the UK as one of the most innovative countries in the world, and the world's leader in Information Communication Technology innovation.

A culture of innovation is embedded within the UK's maritime sector, driving us to constantly innovate, challenge existing norms, create new technology and drive progress.

Right now, the UK is the place to be for maritime technology.

High-quality design & manufacturing

The UK offers high-quality and bespoke maritime design, ship building and manufacturing.

From prestigious handcrafted yachts to complex and highly technical naval systems, quality and reliability are ingrained in everything designed and made in the UK.

Unparalleled services expertise

The UK is the undisputed global leader in maritime professional services, with unmatched expertise in vessel chartering, insurance, legal, financial and educational services.

Centred on London, but with companies spread across the UK, an unrivalled range of businesses provide specialist professional services to global maritime business.

The UK sits at the heart of the international maritime industry and its professional expertise is called upon by shipowners and charterers worldwide.

The UK's world-renowned maritime professional services will support you and your business to meet the challenges of today and tomorrow.

Major investment opportunities

The UK is the perfect base from which to access markets worldwide with an unrivalled business environment, internationally competitive tax regime – including the lowest corporation level in the G20 – and an attractive tonnage tax regime for shipowners.

With few barriers to starting or growing a business, our versatile time zone, global language and access to top talent, make the UK a valued and attractive location for inward investment.

Connected infrastructure and government commitment to further significant investment add to the UK's appeal.

Whether looking to base your business in the UK, or invest in numerous exciting projects, the UK is the proven choice for global inward investment.

Inmarsat is the leader in global mobile satellite communications. Thousands of vessels rely on end-to-end service availability and coverage for operational communications and safety services.

Five-year plan

Promoting the UK's maritime offer to customers across the world requires collaboration with government. Maritime UK and the Department for International Trade are now working on a joint five-year plan for maritime exports and investment.

Target markets

In order to provide a coordinated role in promoting the UK overseas to international audiences, Maritime UK undertook detailed research to establish which countries or regions are priorities for its members.

"It was important to first of all identify where we want to focus our promotional work," says Maritime UK director Ben Murray. "We went through a process in which members were asked to identify their target markets."

There were no big surprises – China was named as the number one growth target market by everyone, but established markets in the European Union and North America were ranked highly too." Other targets include Japan, India, Singapore, South Korea and the United States.

In response to these findings, Maritime UK organised its Shanghai Trade Mission in March 2017, and there was a strong focus on China during London International Shipping Week. More events are planned in China, in Shanghai and Hong Kong.

In May 2018, Maritime UK organised a gathering of those interested in the Indian market, to discuss the opportunities in India and how these could be matched. "This event provided practical steps and was an important platform for bringing all the opportunities together," says Ben Murray.

"We are planning further trade missions and carrying out scoping work for this."

Promoting the offer

Trade missions and pavilions across the world help the UK showcase its maritime capabilities and forge new trade links with other marine nations.

Home to one of the world's most important marine sectors, the UK maritime industry has a long history of promoting itself on a global stage. The sector demonstrates its prowess through trade missions and pavilions all over the globe, unlocking trade opportunities in the process. Additionally, with the UK set to leave the European Union in March 2019, the country's maritime industry looks set to play a crucial role in ensuring that the UK maintains a prosperous and steadfast economy.

One key player in the UK maritime industry's work to boost trade with other economies is the Society of Maritime Industries (SMI). The voice for the UK's maritime engineering and business sector, the SMI backs a full programme of events in the commercial marine and defence sector to support UK companies in their efforts to increase exports.

"With the dominance of commercial shipbuilding in South Korea and China the exhibitions in these countries and surrounding nations — Singapore and Vietnam — are the core events in the industry calendar," says Tom Chant, the SMI's director of business development and secretary to SMI councils. "The European shows of SMM Hamburg, Nor-Shipping and Posidonia support the management and ownership sectors plus specialised vessel-build — although of course, the industry hunts for projects at all the exhibitions. Defence exhibitions such as Defence and Security Equipment International, PACIFIC, the Doha International Maritime Defence Exhibition & Conference, Euronaval and BALTEXPO offer the industry opportunities to meet with local defence attachés and key decision makers."

For the SMI, the goal at exhibitions is to offer a strong UK-branded environment with extra-serviced meeting space. The organisation works closely with the UK's Department for International Trade (DIT) at the shows, with the government potentially offering grants or commercial officer support.

British Marine, the leading trade association for the UK's superyacht, leisure and small commercial marine sector, also collaborates closely with the UK DIT at maritime-related events. The organisation has been involved in creating and managing UK pavilions at international boat shows, exhibitions and inward missions. Previous examples of its work include the Superyacht UK Tour of Excellence, where approximately 12 key decision makers from overseas markets from the superyacht industry were invited to the UK by British Marine association, Superyacht UK, to explore businesses in the sector.

"The objective of this inward mission was to connect the international specialists with the innovation and high quality that the UK is famous for, with a view to securing new trade relationships," says Richard Selby, Head of International Development for British Marine and Superyacht UK.

Other British Marine work has included creating and managing a trade mission to the Miami International Boat Show for the UK DIT, organising a British pavilion in the form of a showcase stand at boot Düsseldorf and showcasing the marine industry through invitations to marine journalists from across the world to join it on a tour the UK's leading boatbuilders and equipment manufacturers. In addition, the organisation hosts a pavilion under the Superyacht UK name at the Monaco Yacht Show, as well as showcasing almost 100 exhibitors in two country pavilions at METSTRADE in Amsterdam.



Promoting the Maritime industries at the Southampton Boat Show 2018.



International Maritime Xchange
The inaugural UK International Maritime Xchange brought together UK companies and international buyers during London International Shipping Week in September 2017.

The event, held at Somerset House, was designed to match the best of British maritime – including cutting-edge technology, high-quality design and manufacturing, unparalleled services expertise and major investment opportunities – with the needs of international partners.

The Xchange opened with a plenary session and delegates were then split into focused sessions to discuss marine engineering technologies, ports and inward investment, cruise technologies and services, maritime business services, education and skills, and UK export finance.

SPOTLIGHT: Maritime UK and the Department of International Trade led a three-day trade mission in March 2017.

Shanghai Trade Mission

The three-day Shanghai Trade Mission in 2017 coincided with the triggering of Article 50, signalling the UK's intention to leave the European Union, thus neatly tying in with the government message about increasing trade and trading relationships around the globe post-Brexit.

The trade mission was designed to boost UK-China maritime links and promote the UK as The World's Maritime Centre.

A seminar on the first day featured presentations on the UK offer, including technology, design and manufacturing, services, education and training, and investment opportunities. The message was clear – there were many strong advantages of being based in London but also many reasons for investing elsewhere in the UK, including in ports and in the manufacturing and distribution activities they serve. There were also one-to-one meetings organised for interested companies.

"This was the first time we had, as a whole maritime sector, decided how we should present ourselves to say – this is the UK offer, this is what it looks like, this is how we promote it overseas," says Ben Murray.

The mission, attended by senior industry and government leaders from both countries, was also timed to coincide with the *RMA Queen Mary 2's* visit to Shanghai during the cruise vessel's East Asian tour. The vessel was used to promote UK excellence across shipping, ports, marine and business services, with a reception, exhibition and networking opportunities onboard.

The programme also included visits to shipyards in the region.

Shipping and Ports Minister John Hayes and Trade Minister Mark Garnier were proactive members of the trade mission. They were joined by representatives of companies from across the UK maritime sector, some visiting China for the first time.

"This was industry and government pulling in the same direction, and it's a model we want to employ again – in China and in other locations," says Mr Murray. "It was clearly answering the question – can we better present ourselves and improve our pitch? There was no doubt about the success of the visit."

David Dingle, Chairman of Maritime UK, says: "The UK and China are two of the world's leading maritime powers, and this trade mission is designed to further strengthen relations between our two countries, delivering benefits for both markets."

The trade and investment relationship between the UK and China has deepened over recent years, and during the visit Maritime UK and the DIT had discussions with the Pudong New Area to identify new maritime trade and investment opportunities for both the UK and China.

Maritime UK intends to build on the success of the Shanghai trade mission, with potential trade missions to India and the United States, as well as a return visit to China.

"Having learned what worked well at Shanghai, we have the promotion material and the 'tool kit' for future such missions," says Ben Murray. "These missions are not just about 'going out there' – they are about providing real information, advice and resource to other people."

A trade mission to Chile is being planned for November/December 2018, as the centrepiece of a new 'UK-Chile Maritime Fortnight'. The activity will see a series of receptions, expos, conferences and ship visits, including the National Oceanographic Centre's *RRS Discovery.* The highly sophisticated research vessel *Discovery* is a multidisciplinary ship designed for undertaking seismic survey, drilling, coring, monitoring and exploration of the subseafloor.

The vessel will be a central part of the Maritime UK event, which is likely to include an expo, summit, seminar and reception, attracting delegates to Chile from across Latin America.

Shanghai Trade Mission audience comprised of key decision makers and potential partners from across the maritime centre.

SPOTLIGHT: British Marine's Boat Show in September celebrates the very best the marine industry has to offer.

Southampton Boat Show

Maritime UK member, British Marine's TheYachtMarket.com Southampton Boat Show 2018 saw around 100,000 visitors experience the fun and excitement of life on the water while offering some serious business opportunities for exhibitors and partner organisations.

Held from 14-23 September in the port city, TheYachtMarket.com Southampton Boat Show 2018 showcased more than 500 of the leading marine brands, from British boatbuilding powerhouses to global equipment manufacturers.

Visitors could explore an array of more than 600 vessels displayed across the event including 330+ moored along Europe's largest purpose-built marina. With an all-star attendance, the Show offered guests a range of marine-themed attractions. Fun was on offer for all ages, with live entertainment, watersports activities and family favourites, the Teenage Mutant Ninja Turtles and Anahita the mermaid, complementing a packed exhibition.

Alongside launching over 180 new boats and products to the market, the Show boasted an array of new features to deliver the ultimate visitor experience. This included the inaugural edition of the Harbourside Gin Festival, which showcased a selection of hand-picked local and nautical-themed gins, and the Science of the Sea Experience, an interactive educational attraction on the blue planet and how we can help improve the health of our oceans. Plus an all-new on the water obstacle assault course, fronted by "Jet", former star of ITV's hit show Gladiators.

Guests at the event included iconic British sailors, Sir Robin Knox-Johnston and Tracey Edwards MBE, and environmentalist TV personalities, Steve Backshall, Monty Halls and Miranda Krestovnikoff, plus other stars including Duran Duran frontman, Simon Le Bon, and the nation's most loved culinary duo, the Hairy Bikers.

Commenting on the event, Lesley Robinson, Chief Executive Officer of British Marine, commented: "With such an array of boats, products, services and expertise on offer at this year's TheYachtMarket.com Southampton Boat Show, it truly was a celebration of the fun, lifestyle and excitement that can be had on the water.

Ms Robinson added, "It once again offered visitors of all ages, from seasoned skippers to young beginners, the opportunity to explore the marine world and get out on the water, whether that be in a kayak, dinghy, sailing yacht or RIB."

Having just celebrated its 50th anniversary, British Marine now look to 2019's Show and how it can develop the event to accommodate a growing demand for space from exhibitors.

Ms Robinson went on to say: "This year's event was very much about looking ahead to the next 50 years whilst we acknowledged our heritage. We are proud to be Britain's biggest festival of boating, as well as being internationally renowned, and we are now set to look at how we can develop the Show to meet the level of interest we are receiving."

The Southampton Boat Show 2019 will take place from 13-22 September. For more information, visit: www.*southamptonboatshow.com*.

"The Show has been a resounding success with an exuberant atmosphere across the 10 days and I am delighted to hear reports of strong sales from across a spectrum of exhibitors."

Lesley Robinson,
Chief Executive Officer of British Marine



Britain's biggest and best festival of boating showcases a plethora of beautifully designed boats and products from over 500 global marine brands.

SPOTLIGHT: A showcase for the UK and London maritime industries to the international marketplace.

London International Shipping Week

London International Shipping Week (LISW) is very much about London and the UK's role internationally – but it is also an international shipping event.

LISW 2017 was more successful than ever, attracting 13 international delegations and up to 20,000 decision makers from the international shipping community, and generating 11 million Tweets along the way. There were 165 official events during LISW, and many more were held unofficially.

"LISW showcases London and the UK, which in themselves have a vital role in forging and moulding international shipping," says Sean Moloney, director of Shipping Innovation, which owns and organises London International Shipping Week. "As far as the international shipping community is concerned, they see London as pivotal – but LISW was also important for promoting the rest of the UK and the tremendous offering and services provided individually and collectively."

Global shipping needs London as much as London needs global shipping, says Mr Moloney. "The lawyers, the brokers, the arbitrators, the insurers are all here – and delegates come to LISW because they know it isn't just an exhibition. It is a collection of hard-hitting, top-notch events working at the highest level, and they value and benefit from it."

Importantly, LISW has total support from the industry and from the UK government, as well as from overseas governments, he says: "This is about everybody working together, about servicing international shipping, and about putting London and the UK's role at the forefront."

Maritime UK used LISW as its platform for launching its new report confirming the value of the UK maritime sector.

The Centre for Economics and Business Research (Cebr) report, 'The economic contribution of the UK Maritime sector', says 957,300 jobs are supported by the UK maritime sector, including shipping, ports and marine services.

The sector generates £37.5 billion gross value added and £4.7 billion of tax revenue, says the report. For every £1 generated by the maritime sector, the wider economy benefits by £2.59.

"This new and illuminating report shows that we are in good health and we are ready to increase our level of fitness by taking advantage of our opportunities," Maritime UK chairman David Dingle told guests at a House of Commons reception.

He added: "Half a trillion pounds worth of goods pass through our ports every year. But an efficient trade network requires a highly developed web of roads and railways that connect these ports to each other and to the rest of the country. Many of the existing connections to the ports are in some cases long overdue for improvement – and they should be considered on a par with other infrastructure projects such as HS2, Crossrail and the expansion of London's airports."

Westminster Parliament House of Commons hosted the welcome reception for London International Shipping Week.





A snapshot of Maritime UK's overseas activity in four important market places.

Maritime UK activity overseas

India

Maritime UK members have rightly recognised the scale of opportunity for UK business in India.

In May 2018, Maritime UK worked with the Department for International Trade and the UK-India Business Council to organise a Forum to increase awareness of the numerous Indian maritime opportunities to British companies. The UK's First Secretary in New Delhi joined the Forum.

India and the UK are two great maritime nations. Endowed with a vast coastline of 7500km and navigable waterways of over 14,000km, India boasts a rich maritime heritage. Thus, the maritime sector has the potential to be a hugely significant driver of Indian growth, and the Indian government has rightly recognised the scale of the opportunity. Sagar Mala and other initiatives are exciting, and the UK wants to help India realise those ambitions.

The Forum heard from companies already doing business in India, including common barriers and respective experience in overcoming them.

In September 2018, during Maritime UK Week, a further seminar was organised with the India Maritime Association in London.

The DIT plans to initiate a scoping exercise of Indian opportunities.

David Dingle visited India earlier in the year to meet with the Transport Minister. Maritime UK plans to organise a trade mission to India in 2019.

Chile

The Chilean Navy celebrates the 200th anniversary of its foundation later this year. To mark the occasion Maritime UK is organising UK-Chile Maritime Fortnight. The two weeks will see a number of major events held, including ExpoNaval. There will be a series of receptions and regattas held across the week, including at the British Embassy. The National Oceanographic Centre's *RRS Discovery* will be calling during the fornight, too. Maritime UK will coordinate a digital campaign to highlight UK-Chile maritime links. Chile, too, is a country that has indicated it interest in discussing a new free trade agreement with the UK.

Netherlands

The British and Dutch have much in common: their love of the sea, a sober outlook on life, faith in pragmatism, and a commercial disposition.

Maritime UK is working with Dutch counterparts to deliver a new UK-NL agreement on maritime collaboration, which is due to be formally launched in the coming months. The centrepiece of this enhanced collaboration between the two maritime nations will be an innovation forum at the end of 2018.

In addition, it will seek to bring commercial partners together, and both sides will organise trade missions over the coming months, including a Dutch focus at London International Shipping Week in September 2019.

Given the strong position of leisure marine within both Dutch and British maritime, there will be a heavy focus on interaction and collaborative activity at the Southampton Boat Show, METS and Monaco Yacht Show.

USA

At the time of going to print, Maritime UK and its member delegation are packing to head to New York for a maritime spectacle. The UK's new aircraft carrier, the *Queen Elizabeth* and British icon, *RMS Queen Mary 2*, are both calling at the same time. They will be the centrepiece of an 'International Trade Day' in late October. For the industry the two ships embody the breadth of the UK's offer, capacity and expertise. Maritime UK has worked with the DIT to organise the launch of the 'Maritime Nations Forum' on board the aircraft carrier. The Forum will bring together UK and US maritime interests to discuss opportunities to strengthen links and enhance collaboration. It will also offer a space to discuss barriers to trade and feed these into the DIT's consultation on a new free trade agreement between the US and UK post-Brexit.

Above: Minister Ghani in Greece with Kate Smith.
Below: Shanghai Trade Mission.





David Dingle, Maritime UK Chairman, speaking at International Shipping Week reception this year.

SPOTLIGHT: The Commonwealth presents a dynamic and fast-growing global market for maritime.

Maritime Commonwealth

The Commonwealth is an extensive network of countries with the potential to boost imports and exports all round.

The Commonwealth of Nations — the intergovernmental body comprising 53 states from Europe, North America, South America, Africa, Asia and Australasia — represents nearly a third of the global population with 2.4 billion people. In 2014, it created a nominal GDP of $10.5 trillion, equivalent to 17% of the gross world product when measured in purchasing power parity. What's more, there really is a 'Commonwealth advantage' for trade: When Maritime UK vice chair (and former Lord Mayor of London) Lord Jeffrey Mountevans spoke at the Commonwealth Heads of Government Meeting in April 2018, he noted that when two nations are part of the Commonwealth, they have reduced trading costs.

A network of possibilities

It is a time of unprecedented change for the UK. The country is facing the prospect of its imminent departure from the European Union — a multinational organisation whose net benefit to the UK could be in the area of 4% to 5% of GDP or £62 billion to £78 billion annually, according to a Confederation of British Industry review. If this proves true, and the UK is hit by a financial shortfall from its EU divorce, or Brexit, Commonwealth trade deals could be key to ensuring its economic prosperity for the future.

Writing for business-focused news source City A.M., Maritime UK chairman David Dingle said that the Commonwealth "represents a golden opportunity for Britain as it leaves the European Union". He also argued that the Commonwealth "is a network with huge potential" — and he's not wrong. Some of the world's most influential countries and maritime nations — including India, Singapore, Australia and Canada — are part of the multi-continent grouping, and what's more, Mr Dingle noted that the Commonwealth contains half of the top 20 emerging global cities. That's not forgetting the sheer size of the organisation's population on top of these features.

However, much of the Commonwealth's potential remains untapped. Discussing the potential of a large increase in trade between Commonwealth members in his City A.M. article, Mr Dingle cited the Commonwealth Trade Review 2015's argument that even without any co-ordinated policy measures, there was potential for $156 billion of additional exports, and of this, over $35 billion was made up of possible exports from the UK.

"As it is, the top ten largest Commonwealth countries — among them India, Pakistan, Australia and Canada — represent just eight per cent of our total exports," he also wrote. "And if you then include the other 43 countries of the Commonwealth, that figure rises only to nine per cent."

Boosting commerce

At the Commonwealth Heads of Government Meeting, Lord Mountevans called for heightened trade between the UK and countries of the Commonwealth. Addressing the Commonwealth Business Forum at the meeting, the Maritime UK vice chair talked of the "huge untapped trading opportunities" in the grouping, also saying that trade was the best way for nations to develop and that developed countries needed to support those that were less developed. He also spoke about the importance of the 'blue economy' and the planet's huge underwater world.

Additionally, Lord Mountevans called for the UK maritime sector to 'work together' to realise opportunities brought about by the International Maritime Organization's April commitment to reduce carbon emissions, saying that "there is a natural advantage in doing so with Commonwealth partners". And with Mr Dingle noting that factors like a shared language and similar legal systems bring down the cost of business dealings between Commonwealth member nations, now's a better time than any for those involved in UK maritime trade to get on board.

The Commonwealth... "represents a golden opportunity for Britain as it leaves the European Union."
Mr David Dingle, CBE
Maritime UK Chairman

Collaborating to drive innovation

The UK government's foresight future of the sea report predicted that the global ocean economy will total $3 trillion by 2030. The prediction is based upon future trends, challenges and opportunities for the UK from the sea.

The report recognised existing UK strengths in maritime, including engineering and marine science, but highlighted the need for increased cooperation and enhanced collaboration across industry and government to capitalise upon the identified opportunities.

Strengthening links with academia **41**
Sector Deal **43**
MarRI-UK: a new UK centre for maritime research and innovation **45**
A blueprint for the future **47**

Inmarsat owns and operates a global satellite network, offering mobile and fixed communication services for maritime, enterprise, government and aviation.

MARITIME MASTERS

Maritime UK's programme for Master's degree students promotes a culture of high quality maritime education in the UK.

Strengthening links with academia

Maritime UK has established its Maritime Masters programme, which delivers valued research supporting the work of the UK maritime sector and promotes academic excellence among Master's students on maritime courses and their universities.

Maritime UK has chosen a number of maritime-related courses at UK universities to be included in the programme, with fields of study including naval architecture, maritime economics and shipping law. Any student enrolled on one of the chosen courses is eligible for the project, with universities selecting participating students through an internal process.

Maritime UK offers each course an individual research proposal which students can adopt as the thesis for their Master's dissertation. The proposals are connected to contemporary issues for the UK maritime sector and its position within the world's maritime environment. University academic staff can tailor projects as appropriate.

Students currently on the programme will present their findings to maritime leaders at an event at Clarksons in London during November 2018, with the author of the winning research (as picked by the audience) receiving a cash prize. Additionally, students on the programme will be able to gain work experience opportunities within the industry. Universities already participating include Plymouth, Queen Mary, LJMU, Strathclyde, Southampton, Newcastle and Cass.

Chosen research topics currently include a focus on IMO policymaking, fintech, shipbuilding production, satellite communications and operational efficiency.

Ideas for future research topics can be submitted by companies. Meet the 2018 finalists: *www.maritimeuk.org/2018masters*



University of Plymouth COAST Laboratory.

A prospectus for what the industry, and Government, can do together.

Sector Deal

The idea of Sector Deals is that businesses and other stakeholders, such as universities and local leaders, should collaborate to produce a clear proposal for boosting the productivity and competitiveness of their sector – a sort of prospectus covering what the industry will do, and what the government will do to support it.

Dr Simon Quinn, of the Southampton Marine and Maritime Institute, part of Southampton University, is helping to coordinate the work.

"The maritime sector is so vast and so diverse, with so many voices – from a Government point of view, a single, industry-wide body was required to give a clear view," he says. "Maritime UK has been able to pull together this whole family of diverse interests into one single contact point and that is largely why the Sector Deal came about.

"It is up to us to come up with a series of challenges, including those which we want to start with and focus very intently on."

Numerous ideas were submitted in March 2018 and feedback followed. The government was particularly interested in the sector's ideas around attracting and retaining maritime business, automation and low carbon technology and coastal economic development. The proposals can be divided into three broad areas; it is envisaged that a final Sector Deal proposal will be submitted in early 2019.

Attracting and retaining maritime business

This area is focused on creating the most attractive business environment for global shipowners and, in doing so, supporting the strength and development of the UK's maritime sector. Bringing shipowners to London means that they are more likely to procure products and services in the UK, as well as invest in research and innovation and the training of seafarers, as shown below.

The industry activity in this area includes:

- A survey to gain shipping companies' views on tonnage tax and a report with recommendations for reform, conducted by the UK Chamber of Shipping.
- Research into the comparative competitiveness of the UK when compared to rival maritime centres – with recommendations across key areas, including residency and ship financing.

Technology and innovation

This area focuses on:

- Low-carbon technology – how can we meet the challenge set by the International Maritime Organization's decarbonisation target?
- Autonomy – how can we build upon the UK's leading position on autonomy?

Coastal economic development

Here, the focus is on:

- Connectivity – road, rail, waterborne, energy and digital; implementing the recommendations of the Port Connectivity Study.
- Planning and development frameworks: what kind of planning conditions would best unlock investment and lead to growth?
- Building capability – clusters and skills. The industry will roll out the cluster model, as developed by Mersey Maritime.



ASV Global's C-Worker 7, the UK's first fully-autonomous vessel, was admitted to the UK Ship Registry in November 2017. The 7.2 metre self-operating vessel controlled directly or remotely, can stay at sea for up to 30 days.



New national initiative for collaborative innovation between industry and academia.

MarRI-UK: a new UK centre for maritime research and innovation

Within the technology and innovation section of the sector deal proposal, Maritime UK has invited companies to register interest in joining Maritime Research & Innovation UK (MarRI-UK). This new national initiative will provide a collaborative innovation platform for UK industry and academia to work jointly in tackling major challenges such as seabed mapping, autonomy and green shipping.

The MarRI-UK project is led by foundation partners, including eight companies, four universities and one trade association; they have come together to address the present lack of coordination and resource in maritime research and development, particularly when compared to competing maritime hubs in Scandinavia and the Far East.

The partners have submitted a collaborative proposal to the UK government's Industrial Strategy Challenge Fund, and further funding proposals are planned.

MarRI-UK will use a hub-and-spoke model, drawing on research and innovation assets across the country.

"The sector coming together and collaborating on innovation, research and development is crucial to the future success of our marine industry in the UK," says John Howle, chief executive of Babcock's Marine Sector and chair of MarRI-UK.

MarRI-UK will make it easier for organisations to share ideas and integrate the roadmaps, business cases and resources needed to develop the country's maritime technologies, responding to the growing global demand for safe, green and cost-effective ships and systems, he says.

Ben Murray, director of Maritime UK, adds: "We have often looked to other sectors and envied their success in attracting significant sums for research and innovation. We urge UK companies from across the sector – shipping, ports, services, engineering and leisure marine – to get involved. Together we achieve more than we do alone. There are huge and exciting global opportunities for the sector to focus on, and we mustn't miss our chance."

The consortium behind MarRI-UK has submitted an ISCF bid which proposes using the government's ambition to map the seabed of its Economic Exclusion Zone (EEZ) to catalyse growth in the marine autonomy industry.

"This could be developed not only to map the seabed but also, in conjunction with satellite technology, to track marine pollution (possibly including plastics), to manage security, to help stop illegal fishing and to identify sites of cultural heritage," explains Mr Murray.

> **"We urge UK companies from across the sector – shipping, ports, services, engineering and leisure marine – to get involved."**
> **Ben Murray**
> **Director of Maritime UK**

Rolls Royce technical imaging.

MARITIME FUTURES

Maritime UK's futures programme will help the UK maintain its position as a global maritime leader.

A blueprint for the future

The UK holds an enviable position as one of the world's leading maritime nations. However, if this status is to be maintained, it is vital that the country sustains a forward-thinking approach. To aid that, Maritime UK has initiated a futures programme to establish the UK maritime sector's vision for the next generation.

The project will seek to understand the future shape of the UK maritime sector through the exploration of a broad range of drivers of change, ascertaining which areas will have the greatest impact. Then, having formulated a vision of what the future holds, the programme will establish what the sector needs to do to respond to and capitalise on such a scenario. Change factors that the programme will examine include urbanisation, water, climate change, convergence, demographics, food, oceans, poverty, energy and waste. The initiative will also make use of existing research, like the UK's Government Office for Science's Foresight project regarding the future of the sea, and outlook projects led by Maritime UK members — for example, British Marine's futures project or the British Port Association's.

"To best position the UK as a competitive, global maritime nation, it's vital that we understand what future we will be competing in," says David Dingle, Maritime UK's chairman. "This ambitious programme will ensure that our companies are best-placed to prepare and shape that future, while demonstrating the UK's position in world-leading maritime thought-leadership and research."

In order to set the futures programme in motion, a series of workshops are being planned. With the UK government having set an open-door challenge for the country's industrial sectors to come forward with proposals to transform their fields through sector deals, output from these events will also feed into the iterative development of a UK maritime sector bid. The first in this series of workshops is expected to take place towards the end of 2018.

Richard Westgarth, Head of Campaigns at BMT, a leading international design, engineering, science and risk management company, is leading the programme. He believes that the UK maritime sector has experienced an attitude shift in recognising how rapidly the industry is evolving.

"We have skills shortages, we see trade changing and we've seen the impact of the potential of Brexit starting to come through," he says. "I think there's a real energy now within the industry from academia, companies and the sector is really taking control of this and driving it forward. The UK government's Maritime Growth Study and subsequent review paper have been key points driving that."

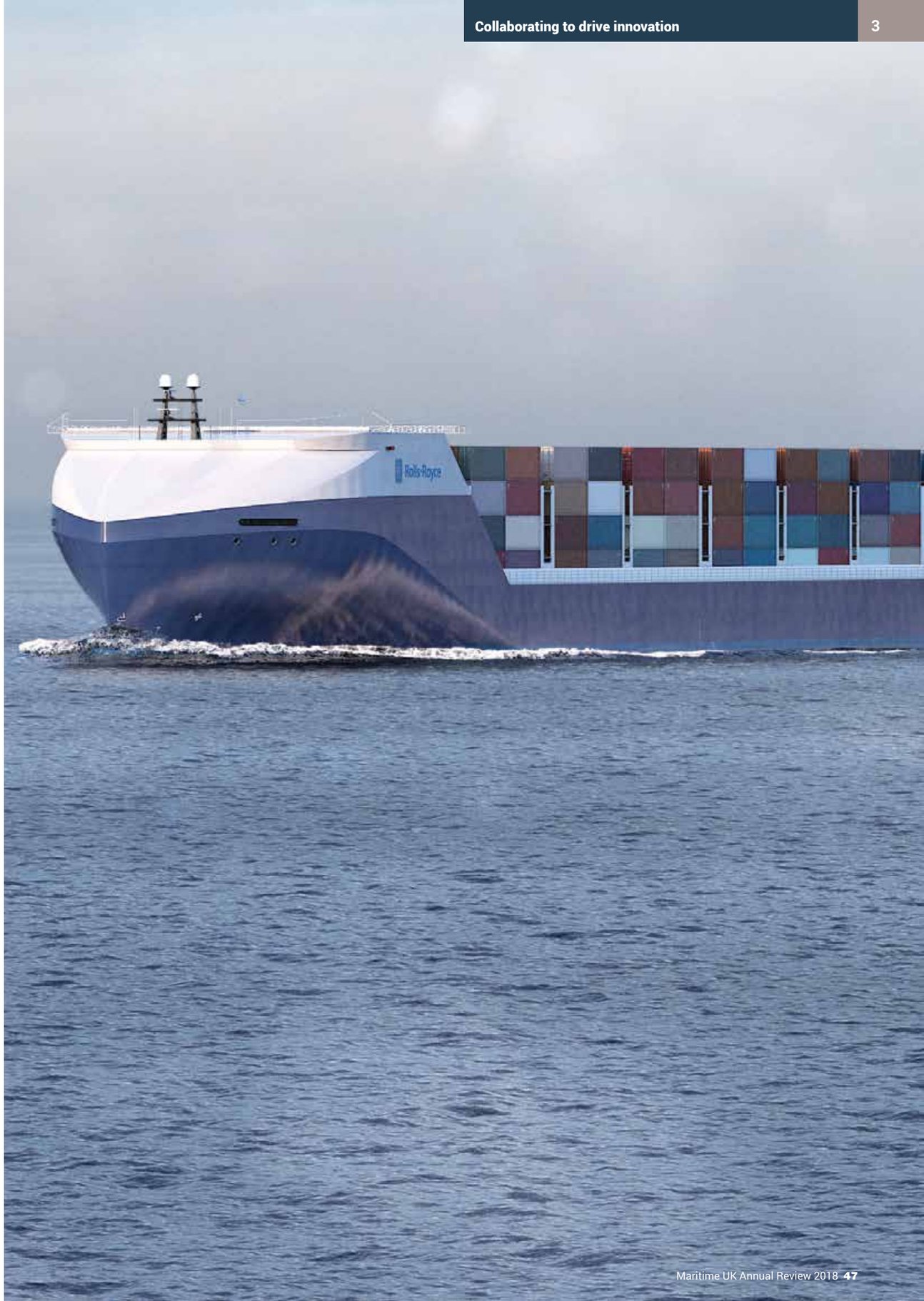
The futures programme will start by focusing on future skills and then move on to other areas. The output from each workshop will help inform those that follow. The workshops will invite participants to identify the drivers for change for the UK maritime sector, pinpointing which change-causing factors will have the largest effect on industry and determining the potential extremes of that impact. From that, the participants will determine the main areas of opportunity for the future.

"We're looking at a 2030 to 2050 timescale, so really from the macro level, rather than just focusing too quickly on where the short term sector opportunities might be," he explains. "We also see it as broader than just the technology, such as unmanned ships or smart ships. Instead, it's about the entire range of potential drivers."

The futures programme is designed to sit alongside the government's Maritime 2050 initiative, whose delivery plans will be agreed in partnership with industry.

By creating a vision for the future, Maritime UK will provide the UK with superior oversight of the industry, helping the country to sustain its position as a global leader on the world marine and maritime stage.

To best position the UK as a competitive, global maritime nation, it's vital that we understand what future we will be competing in



Automated vessels and container ships may influence future maritime skills.

Ensuring the skills to fuel maritime ambition

Understanding what the sector needs, recruiting, creating qualifications and developing a diverse workforce.

Setting the direction of travel **51**
Jobs galore, at sea and ashore **55**
The human element? People are much more than that! **57**
Women in Maritime **59**
Year of Engineering **63**
Apprenticeships **67**
Spotlight: Jack Lawson, Trinity House apprentice **69**
Spotlight: Abbie Jones, Associated British Ports apprentice **71**
Spotlight: Mac Bierowiec, Seadub apprentice **73**
Spotlight: Scott Arrowsmith, SMS Towage apprentice **75**

Lloyds Register has a long history of independent inspection to provide assurance to manufacturers.

A flourishing maritime sector depends on a talented, qualified workforce. The Skills Strategy seeks to identify the high-tech skills and training required across the industry.

Setting the direction of travel

The need for a well-defined, carefully researched Skills Strategy was highlighted in the Maritime Growth Study. The skills issues facing the UK maritime sector should be identified and prioritised by assessing the current and future need for wider skills and qualifications across the sector as a whole, said the study, and the Skills Strategy should be developed with focused objectives for addressing those concerns.

The Skills Strategy will be formalised soon, and a good deal of work is already in hand or completed. This has included an in-depth survey of Maritime UK members to pinpoint their problems and priorities.

It is a paradox that the more the maritime sector invests in technology, the more it relies on its people, says Iain Mackinnon, secretary of the Maritime Skills Alliance.

"Sophisticated technology needs sophisticated people to use it," he says. "We are long past the point where simply filling a vacancy was enough; we need to shift our attention from quantity to quality. To compete effectively, we need talented people – so we need to review how we recruit our share of the next generation's talent as they start their careers.

"We need to look, too, at those who move mid-career, and we need to be sure that the talented people we recruit stay, and contribute to the fullest extent of their ability."

This is what the Skills Strategy is all about – setting the direction of travel for a highly sophisticated industry which is competing on the 'added value' created

Inmarsat rocket launch - owners and operators of a global satellite communications network.



Funding success for SMarT Plus training approach

A coordinated, year-long campaign by the UK Chamber of Shipping and trade union Nautilus International to boost seafarer training has delivered an excellent result, with the government announcing in February 2018 that it will double funding for training.

The annual intake of cadets is likely to grow by 60% to as many as 1,200 thanks to this investment, which will be offered through the Support for Maritime Training (SMarT).

However, the new SMarT Plus approach goes much further. In return for the increased funding, shipping companies backing the policy have agreed to create an extra 450 training positions on their vessels, in order to guarantee cadets their first jobs.

"As part of our charter for jobs, we asked the government to provide the extra funding to support this industry-wide plan, which brings on board the commitment from companies who take cadets to actually give them their first tip on ships as qualified officers," says Nautilus International general secretary Mark Dickinson.

"We have seen a lot of companies taking cadets for the period of their training but not actually employing young British officers – as a result, many cadets are getting to the end of their training and have not been able to find work.

"They are then into the cycle of no experience, can't get a job, but can't get experience because they haven't got a job. SMarT Plus will ensure they have their first trips as qualified officers, so they can start progressing."

Jonathan Roberts, communications director at the Chamber of Shipping, says: "Guaranteeing cadets their first contract for a year is vitally important. This will give them enough sea time and experience to get going with their career. We know that experienced British seafarers are hugely competitive in the global jobs market, and training under SMarT Plus will provide them with the perfect platform to build a long and rewarding career."

Continued on next page

marlan
MARITIME TECHNOLOGIES

SITUATIONAL AWARENESS. ASSURED.

- Shoreline and hydrographic monitoring
- Renewable energy asset monitoring
- Port security, efficiency and safety
- Maritime border observation
- Coastal Surveillance

Your coast is changing... are you watching?

Our coastal monitoring tools are transforming the way coastlines are managed, reducing cost, energy consumption and CO_2 emissions.

Patented methods provide continuous hydrographic monitoring for evidence-based decisions, looking after coasts for future generations.





Compass *Promoting international ports for over 25 years*
Wistaria House, 15 Bexwell Road, Downham Market, Norfolk PE38 9LH, UK
T: +44 (0)1366 858367 E: admin@compass-handbooks.co.uk www.compass-handbooks.co.uk



by talented people, and identifying what else must be done to succeed in that endeavour.

"We were delighted that the well-researched proposal from Maritime UK members Nautilus International and the UK Chamber of Shipping to double the funding for Merchant Navy cadets has now won approval from the Department for Transport," says Mr Mackinnon. "We have a strong and expanding range of apprenticeships across the sector, which are an important means by which companies can attract, and properly train, home-grown talent instead of relying on overseas labour.

"We have new careers pages on our website, covering the whole of the sector, and an active Careers Forum working to get the word out to potential new recruits. And we have just launched our Women in Maritime Taskforce to address the very low numbers of women in so many parts of the sector, and the difficulties which too many of them face."

Traditionally, many shore-based maritime jobs were taken up by former seafarers coming ashore. With lower numbers employed than in the past, forward-looking employers are rethinking past assumptions and finding ways to train the people they need.

Onboard, there may be a much smaller number of seafarers – but they need to be talented, skilled and trained, with proper management arrangements in place to use their skill and talent. The same emphasis is true on the building side – ships and yachts and boats – with increasingly high-tech roles to fill. If those roles were not filled, it would take longer to meet orders, and that could mean losing work to other countries.

"What skills are needed and how do we get them? The risk of jobs disappearing entirely is overplayed but the nature of the skills involved will certainly change," says Mr Mackinnon. "We need people to be much more aware of what technology can do and how to work with it effectively, and we need training courses that reflect this." The skills strategy is available online: *www.maritimeuk.org/skills-strategy*

Rolls Royce are at the forefront of innovation and experience in the Marine sector.

The government will increase its funding incrementally, from the current £15m to £30m a year, with flexibility to ensure there is enough money for a rise in cadets. "We are keen to ensure that we don't have an unsustainable increase in cadets," says Mr Roberts. "However, we know there are companies out there who want to train more and employ more British seafarers. We know there is concern about the ageing workforce. And we know that young people do want to go to sea."

The training places will be available to anyone across the UK who has an interest in becoming a navigation officer, engineer or electro-technical officer, at a range of colleges including Warsash Maritime Academy in Southampton, City of Glasgow College, Lairdside Maritime Centre in Liverpool, Fleetwood Nautical Campus, NAFC Marine Centre, University of Plymouth and the South Shields Marine School.

Announcing the new policy, Shipping Minister Nusrat Ghani said, "We are building the maritime workforce of tomorrow and I want to encourage more young people to consider an exciting and rewarding career at sea."

The taxpayer sees a £5 return on every £1 it invests in seafarer training, so this funding will benefit the economy and the workforce, as well as the industry, said UK Chamber of Shipping chief executive Bob Sanguinetti.

"Seafarers are highly skilled and well paid, and have the opportunity to build a successful long-term career. We know this funding will help us to unlock the talents of more young people, and it goes to show what can be achieved when government and industry work together."



Maritime UK's Careers Promotion Forum coordinates existing careers activity between those promoting careers and delivers new activity on behalf of the whole sector

Jobs galore, at sea and ashore

Maritime UK careers stand at Olympia, London.

The UK plays host to one of the most vibrant and competitive maritime sectors in the world and its skilled workforce stands as one of the key reasons for its success. However, the whole sector faces an ageing labour profile and a recruitment challenge at grass roots level. If left unchecked, both could seriously hinder the effectiveness of 'UK maritime' in the future.

There is, says Nick Harvey from Maritime UK's Careers Promotion Forum's secretariat, "widespread public ignorance about the UK's dependence as an island nation on seafarers, shipping and the wider maritime industry. A lack of knowledge about maritime employment opportunities appears to exist not just inland, but also even in port cities and harbour towns. Yet, no one in the UK lives more than 70 miles from the coast."

Maritime UK has taken up the charge of promoting the diverse range of maritime careers available across the UK through the Careers Promotion Forum, which was set up under the chairmanship of Commodore Barry Bryant, the director general of Seafarers UK, in 2016. Its initial role was as a working group tasked with reporting to Maritime UK board members about the need to increase awareness of pan-sector maritime employment opportunities – especially for young people and their parents, teachers and careers advisers. Today, the Forum has 22 members, representing a diverse range of organisations all keen to promote employment opportunities across the whole maritime sector in the UK – both at sea and ashore.

Breadth of roles

Members of the Forum represent hundreds of businesses offering 'wet' and 'dry' jobs in the maritime sector, including British Marine, the Royal Yachting Association and the Society of Maritime Industries. Other members have specific targets for recruitment, like the Merchant Navy Training Board, whose Careers at Sea initiative is promoted online and in schools through a network of volunteer Ambassadors. "Whatever the level of individual interest, the challenge for our industry is to demonstrate its appeal to talented young men and women who may know nothing or little about maritime," Mr Harvey says.

The board comprises organisations spanning an extensive range of maritime job opportunities – including some that one may not initially consider when looking at a sea-related career.

"Forum member the Maritime Skills Alliance alone has 18 members including those that may otherwise be overlooked when jobs at sea are being promoted such as the British Tugowners Association, The Worldwide Yachting Association, the National Workboat Association, and Sea Fish Industry Authority," Mr Harvey says. A challenge for the entire maritime industry is to be "collaborative", he adds, with careers promotion and explain that transferable skills can unlock jobs both at sea and ashore.

2018 will be a busy year for the Forum, with its attendance at the National Career Guidance Show at Olympia in London, and its involvement in the UK Government's Year of Engineering, where it lined up maritime case studies of young people for the campaign's promotion. The Forum also delivered a digital campaign during National Careers Week 2018 to draw attention to the full range of maritime industry job opportunities. Additionally, June's Seafarers Awareness Week, organised by Seafarers UK, held to coincide with the International Maritime Organization's global Day of the Seafarer, was themed to promote UK maritime employment, with an emphasis on engineering.

Getting the message across

Maritime UK organised the first cross-sector attendance at the National Careers Guidance Show in February.

The show is put on specifically for careers advisers, teachers, parents, careers leads in schools and careers educators from any other setting.

Despite the weather, the show featured more than 200 exhibitors, plus one-to-one CPD clinics organised by the Career Development Institute (CDI). There was also a programme of expert talks. Careers 'influencers' were keen to learn more about the possible career opportunities for their students and clients.

Maritime UK's Careers Promotion Forum has decided to focus its joint promotional activity at careers influencers. Careers leads from the Merchant Navy Training Board, Institute of Marine Engineering, Science and Technology, Royal Fleet Auxiliary, Institute of Chartered Shipbrokers and Seafarers UK joined the stand.

Maritime UK's presence showcased the breadth of careers available in maritime and directed users to visit the careers section of the website *www.maritimeuk.org/careers*, which signposts users to the lead industry organisations for each part of the sector.

The Maritime Growth Study challenged industry to come together to better coordinate the promotion of the numerous career opportunities across maritime, and joint attendance at careers events is forming part of the industry response to the recommendation.

Further activity is booked for Newcastle, Leeds and Glasgow toward the end of 2018.

Seafarers UK enthusiastically welcomed the UK's Maritime Growth Study report in 2015, where half of the 18 recommendations focused on people and skills.

The human element? People are much more than that!

It goes without saying that people are the lifeblood of any thriving maritime community. At sea and ashore, UK sourced and trained men and women are prized across all sectors of our national and international nautical and marine industries.

Historically, the UK's maritime workforce tended to come from families with a tradition of service at sea. From the Royal Navy to Britain's fishing fleets, sons have followed fathers – and in many case grandfathers – into seafaring. Nowadays daughters too are increasingly attracted to careers at sea – but we need to open the eyes of a much wider potential catchment.

Ashore, naturally, dock workers are typically found living in those cities and towns where ports and harbours – and associated freight and logistics services – are major local employers. Numerically there are far more maritime jobs ashore than there are at sea, with opportunities available for people with a wide range of academic abilities.

Britain needs to maintain a home-grown maritime workforce for many reasons. Logically, the Royal Navy and Royal Fleet Auxiliary can only recruit from around the UK and Crown Dependencies. Experienced seafarers are required to go on to work as Pilots and Harbour Masters, in maritime insurance, finance, shipbroking, crew management and other services. Job migration is an important factor, for example with fishermen who are well placed to skipper vessels servicing offshore energy installations including windfarms.

As Mark Dickinson, General Secretary of the Nautilus Union observed: "Any maritime nation serious about its future must have policies in place which help to maintain a sustainable supply of domestic seafarers and a healthy national shipping industry."

Another organisation that is totally aware of our island nation's ongoing dependence on seafarers is Seafarers UK, the charity that for more than one hundred years has been supporting maritime communities across the UK.

Although best known for its funding to support welfare services for seafarers and their families, since it was formed in 1917 as King George's Fund for Sailors, Seafarers UK has always had in its Royal Charter an obligation to promote 'The education and training of people of any age to prepare for work or service at sea'.

That's why Seafarers UK enthusiastically welcomed the UK's Maritime Growth Study report in 2015, where half of the 18 recommendations focused on people and skills.

When Maritime UK was re-vitalised as the single industry body required to respond to those recommendations, it made sense for Seafarers UK to join as a full member, not least to ensure that 'people', and their personal and professional needs, were kept uppermost in the minds of industry representatives and government departments.

Having coordinated Seafarers Awareness Week annually since 2010, Seafarers UK was acutely aware that 'sea blindness' was severely hampering our maritime industry's efforts to interest young men and women in maritime careers. Unlike the Royal Navy, with its considerable recruitment budget, the rest of the 'UK Maritime' – to use that term widely – had no such funds, or indeed much evidence of concerted effort, apart from the Merchant Navy Training Board.

Although there appeared to be no shortage of candidates for Merchant Navy Officer Cadetships, elsewhere across the whole UK maritime sphere serious skills shortages had been identified, and indeed were sometimes endemic.

Seafarers UK offered to chair a new 'Careers Promotion Forum' for Maritime UK, where representatives of all sectors could be invited to share their needs and discuss how best to collaboratively promote job opportunities. This year there was an emphasis on engineering and making the sector more attractive to women.

One key member of the Forum is the Maritime Skills Alliance, representing vital sectors that are frequently overlooked: Tugs, Jack-up Barges, Superyachts, Workboats, Lifeboats, Fishing Boats, Thames Vessels, etc. Others include the Royal Yachting Association, providing qualifications for thousands of people to work on small commercial vessels.

Recommendations from the 'Careers Promotion Forum' contribute to the very popular 'careers' content on the Maritime UK website, and to the decision to attend Careers Guidance and Skills Shows around the UK.

Practical steps such as these resulted in maritime job opportunities being promoted to an audience of predominantly young people who, until now, were largely ignorant about how training and employment in the maritime industry could be hugely interesting, well-paid and a great first step on a satisfying career pathway.

Seafarers UK is pleased to be able to contribute to Maritime UK's work in this way, and to ensure that the vital role of 'the human element' is never overlooked.



The superyacht* Aquila *was refitted at the Falmouth yard of Pendennis. Superyachts are a vital workforce sector which is frequently overlooked.

WOMEN IN MARITIME

Maritime UK's new taskforce aims to address the issue of attracting more women to the maritime industry.

Women in Maritime

"Any company that is interested in good business is interested in diversity," says BP Shipping CEO, Carol Howle. And any sector that chooses to overlook over 50% of the population when seeking talent and expertise is making a huge mistake.

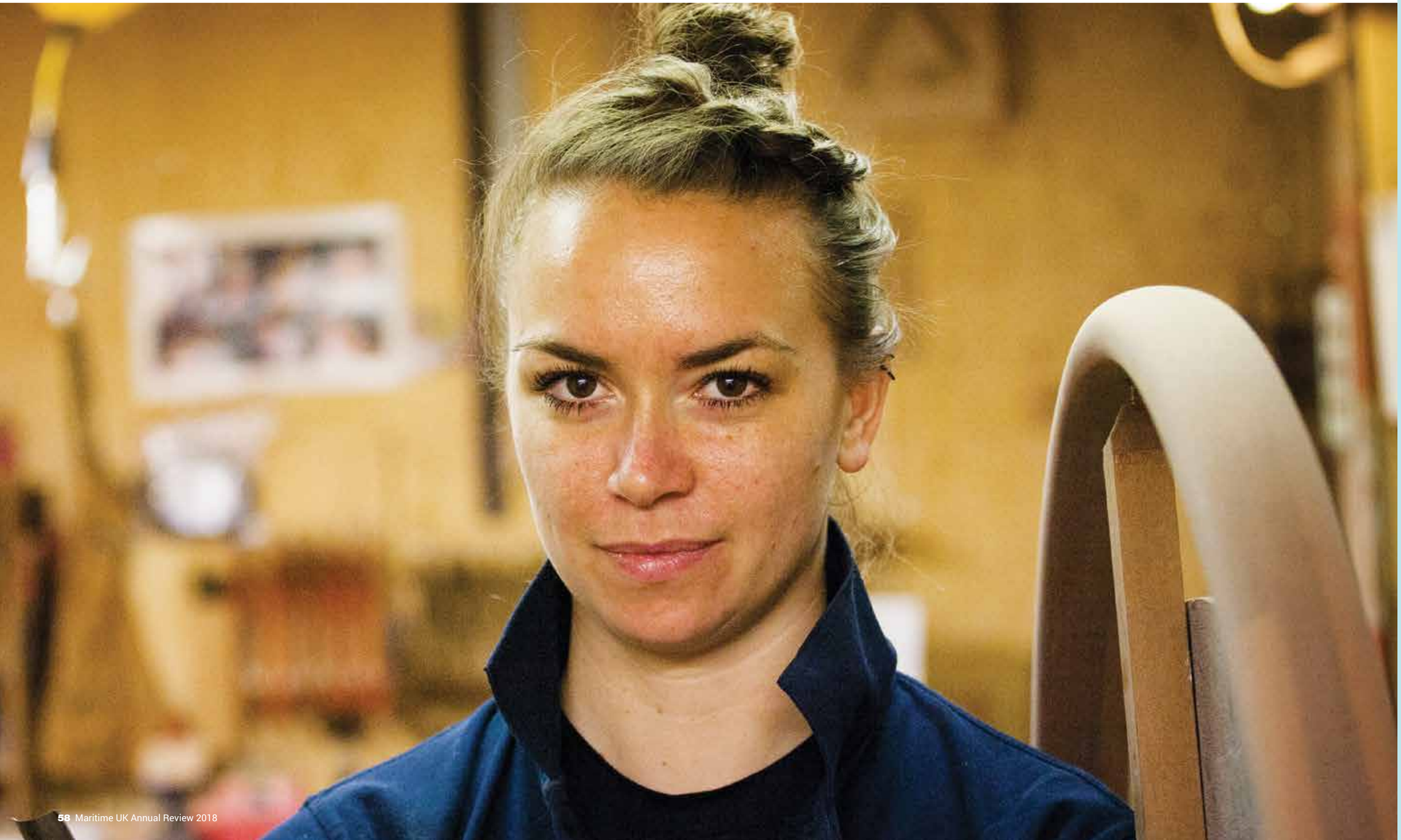
The figures speak for themselves. Across the globe, just 3% of seafarers are women. And the picture is equally poor across the rest of the sector.

Lilian Greenwood, who chairs the House of Commons Transport select committee, says: "Right now, our maritime sector is missing out on the skills and talents of an outstanding women workforce."

To address fairness, equality and inclusion within maritime, Maritime UK established the Women in Maritime Taskforce. Its aim to identify practical steps to increase the number of women in the maritime sector by making recommendations to industry and government as well as coordinating pan-sector activity and the sharing of the best. Crucially, the Taskforce also seeks to redress the balance in the number of women in senior roles across the sector, which comprises the shipping, ports, services, engineering and leisure marine industries.

Chaired by Sue Terpilowski, who holds a number of roles in the shipping industry, including that of president of the UK branch of WISTA, the taskforce is made up of leaders from across the maritime sector. Terpilowski says she has become more acutely aware of the challenges of women in maritime. "There are women of all ages and abilities wanting to be a part of our maritime future and we must make sure we don't waste any more time in not addressing this issue," she says.

UK maritime minister Nusrat Ghani MP – who herself is only the second woman



Workstreams

Beyond the Charter, the Taskforce has identified key areas in which to focus effort: Recruitment, Progression, Retention and Total Package. Subgroups have been established comprising relevant practitioners and each will feed into the Taskforce's recommendations and toolkit development, and provide a forum for knowledge sharing.

Proposals from early subgroup meetings include workshops on unconscious bias, sharing best practice on the role of job description language in attracting women applicants and sharing of HR personnel between companies.

Data is important, so the Taskforce will commission a robust survey to properly understand where we are today to ensure progress can be measured going forward.

Maritime UK's National Council – the sector's leadership – is firmly behind the initiative, and formally signed the pledge in July.

David Dingle, Chairman of Maritime UK and Carnival UK said, "Without a diverse workforce we will not be able to tackle the challenges we face – including innovating cutting-edge technology, such as that required to decarbonise shipping. A plurality of ideas and creative thinking is absolutely critical to the future success of UK maritime, one of Britain's biggest industries.

And there's reason to be hopeful according to Dingle: "I'm encouraged by the reaction from companies right across the sector. There is real determination to make progress, and to do so as an industry. Given the size of our sector, we have a real opportunity to affect significant change across the whole country."

Spirit Yachts employ women in their world class team of experts.



Trinity House had 298 'full-pay relevant employees' as at 5 April 2017 of which 69 were female.

We are committed to building an employment culture that actively supports and celebrates gender diversity, at all levels, throughout our organisation and our industry

to hold the UK Department for Transport portfolio for the sector – commended the establishment of the taskforce.

"I am delighted to see Maritime UK taking action to attract more women into our maritime industries, and I welcome this Taskforce as an important first step," she says. "The UK government challenged maritime leaders, businesses and colleges to find ways of increasing the number of women in the sector, and it is great to see them respond in this way. There is a fantastic wealth and breadth of career opportunities in maritime, and I am determined to see more women accessing these."

Lilian Greenwood added her support: "A plan to tackle gender inequality isn't just 'nice to have', it's essential."

Pledging action

One of the first initiatives from the Taskforce is the Women in Maritime pledge, taken by companies, to signal their intent to deliver change.

"We are committed to building an employment culture that actively supports and celebrates gender diversity, at all levels, throughout our organisation, and our industry"

Over 60 companies and organisations have already signed the pledge, including AMI Marine, Carnival UK, DP World, Lloyd's Register, BP Shipping, IMarEST and the Royal Navy. They are all committing to take practical steps and set measurable, ambitious goals. The Taskforce plans to support companies through the Women in Maritime Charter, launched during Maritime UK Week in September 2018. They will be supported by toolkits comprising best practice, workshops and mentoring. Performance against the Charter commitments will be monitored through a joint industry-government annual report.

Despite being behind the curve on diversity, there is now real momentum to deliver change. Starting from behind has allowed the Taskforce to learn from others and see what works. This included meeting with HM Treasury to learn from their experience in developing the Women in Finance Charter as well as with Royal Mail – a leading diversity proponent.

The Taskforce is keen to highlight and celebrate improvement. Annual awards to recognise company performance will be established.

The experience of some women in the sector testifies to the need for change. Nicola d'Hubert, global head of brand and external relations at Lloyd's Register Marine & Offshore, recalls a time in her maritime career when she felt that her gender made a difference. She was working in China on an expat posting as part of her nautical career.

"The entire system, at that time, was built around the expat employee being male," she remembers. "Not only did that mean that you had to actively push for access to the same benefits, it was also a challenge socially as the only female expat in the management team. I am not saying that my colleagues weren't fantastic…but you didn't feel automatically accepted and part of that world as you were changing the status quo from a system and process perspective. It took a lot of extra effort, although the overall experience was a positive one."

Marine engineers are in demand in an industry that offers a wide and varied range of careers.

Year of Engineering

With close to 200,000 people with engineering skills needed each year up to 2024 in the UK, according to careers website Prospects, those looking to put technical and problem-solving knowledge and skills to good use are in demand.

This is certainly true of the maritime sector, where engineering plays a crucial role in keeping a marine economy afloat. With jobs available both ashore and at sea, marine engineers focus on the design, construction, installation, operation, maintenance and repair of the machinery, systems and engines that keep the seaborne fleet moving.

Marine engineers might work on board vessels or offshore installations, on the UK's military ships, or in ports, in a career that encompasses a variety of different disciplines, including structural, mechanical and electronic engineering.

Whatever sort of role a would-be engineer is looking for, the maritime industry is likely to have it. Nowhere is this truer than in the UK, where 95% of the country's international trade moves through its ports. And with 2018 the UK government's designated Year of Engineering, there's no better time for those interested in working in this field to consider making their career in the maritime sector.

A fulfilling working life

After Zoe Stock, now an engineer for Princess Yachts in Plymouth, was made redundant from her job at an electrical firm, she heard about an open day at the company on the radio and decided to go along. That initial visit led to her joining the organisation as a Grade 3 Engineer, and she now works on a boat line at one of the shipyard's six sites in Plympton in northeast Plymouth, fitting out luxury yachts.

"If I'd known then about the engineering careers available in the marine sector, I would have joined years ago," she says. "I wish I had been in the marine sector from the start, really, but it's better late than never."

Ms Stock's work on the boat line offers a multitude of different opportunities and learning experiences. "One minute you can be on the flybridge, next minute you can be on a pre-build, so you learn a bit about everything."

Clarissa Lille-Barkes works on the same boat line as Ms Stock. She is in the fourth year of an apprenticeship at Princess Yachts, having joined the company after completing a two-year engineering course at college. She was given a vision of life as an engineer at the company when she visited the company on a stand at an open day at her college, where ex-apprentices were on hand to talk about the options available for engineers at the firm.

"That gave me an insight before I actually applied – it helped me decide that that was the kind of the job I wanted to do," she recalls.

For Ms Lille-Barkes, knowing that apprentices work on an empty hull of a boat and fit it out with everything required was what attracted her to the apprenticeship. She notes that "your work becomes someone else's pride and joy".

"To anyone considering an apprenticeship in engineering, I'd say: give it a go," she comments. "You never know if you like something until you try it. Princess even offers work experience weeks during the summer, so anyone can give engineering a bit of a trial run."



Pendennis state-of-the-art construction halls and workshops in Falmouth are used by over 440 highly skilled tradespeople creating one of the best facilities in Europe for the custom build, refit, remodel and restoration of 30m-100m superyachts.

Assisting naval forces

Captain Stuart Peters is the operational support manager for the Royal Fleet Auxiliary Service (RFA). A qualified Chief Engineer, he is based in Bristol working in the Defence Equipment & Support organisation. The RFA is a UK government-owned and managed civilian-manned flotilla of 13 ships that allows Royal Navy vessels to maintain operations across the globe. Captain Peters began his career as a junior engine room rating and worked his way up the ranks on the mechanical side of the organisation before training to become an engineer.

He explains that RFA engineers are truly helping to ensure the UK's safety and security. The RFA is now much more involved with core naval tasking and the ships are fitted with weapons to be used in self-defence which are maintained by the ship's engineering staff.

Captain Peters is enthusiastic about the opportunities engineering offers and explains how work in this field can have an important humanitarian aspect: "You get the excitement of going somewhere new and then you get to help out in something like the Ebola crisis – how much more worthwhile can you get?" he says.

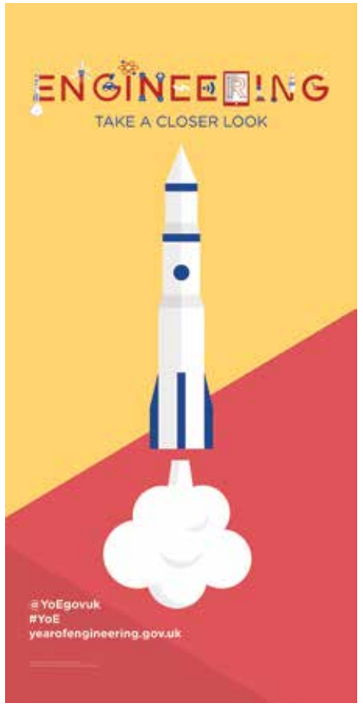
Tony Parker, a Chartered civil engineer, is director of engineering at Shoreham Port, working on developing the port's infrastructure and facilities to keep pace with the port's fast rate of expansion. He has enjoyed a varied engineering career. Before undertaking a five-year structural engineering course at university, Mr Parker spent three years working for a civil engineering contractor that focused on land sites around the UK's coastline and estuaries. After university, he moved into international engineering consultancy, specialising in maritime and designing and constructing marinas, ports, water-side developments and coast-defence systems.

"I have always had an attraction to the sea – I live near it and sail on it for pleasure — and working in the maritime sector enables me to add fulfilling Isambard Kingdom Brunel's vision of harnessing the great forces of nature for the benefit and use of mankind to my nautical affinities," he says.

"Although engineering is a huge and diverse sector of the economy with careers to suit a wide variety of people, there are shortages of skilled personnel in all areas. All you need to find a career in engineering is a practical bent, a hard-working, diligent and enthusiastic outlook, and a determination to achieve."

Though Mr Parker notes that becoming a Chartered civil engineer requires a significant number of years of study and intense development, he explains that "there are a huge range of opportunities in engineering and most of them are not so academic".

"Here at Shoreham Port, for instance, we have qualified tradesmen and technicians, apprentices and general operatives with a wide variety of skills and abilities and a broad range of academic achievement," he says.



Getting recruits on board

That said, the UK is in the midst of a skills gap when it comes to filling jobs for people with engineering skills. The UK government's Year of Engineering campaign, taking place this year, serves as a year-long mission to tackle this shortfall and increase the amount of young people joining the sector.

"Engineering is facing a big challenge regarding how to make itself attractive to the younger section of the population as a career of choice," says Captain David Smith — who is head of the RFA's Marine Engineering Specialisation. "There is an apparent and significant ignorance among parents and careers teachers of the opportunities that exist. When coupled with the drift away from choosing the science and maths-orientated subjects in favour of less science-based subjects, this has resulted in too few people applying for jobs within the profession over the last decade.

"The Science, Technology, Engineering and Mathematics (STEM) ambassadors scheme, of which I am a willing participant, seeks to address this and several big engineering companies and organisations are involved in it."

Captain Smith believes that engineers haven't "trumpeted" the importance of what they do enough, noting that engineering is not a 9-to-5 role and "it is certainly not boring". "Successes in maths and science are not something to be afraid of. We want to get the message out to young people that engineers make the world go around.

"Britain has a rich history in engineering with the likes of Brunel, Charles Parsons, James Watt, Alexander Graham Bell and more recently James Dyson contributing to our engineering success," he says.

Shoreham Port's Mr Parker adds that digitalisation, climate change and globalism are starting to inspire a period of very fast change for the UK maritime sector, and that development of the country's "ageing infrastructure" must "keep pace".

"The big challenge for engineers in the maritime sector is to drive developments in our ports and on our vessels to keep pace with a rapidly-changing world," he says.

With so much radical change set to hit the UK maritime industry, alongside the fact that the country's engineering field is crying out for new recruits, it seems like an ideal time for those interested in a marine engineering career to jump on board.

"Britain has a rich history in engineering with the likes of Brunel, Charles Parsons, James Watt, Alexander Graham Bell and more recently James Dyson."

Captain David Smith
Head of the RFA's Marine Engineering Specialisation



Cammell Laird has grasped the urgent need to train and provide experience for the young engineers who will drive maritime programmes forward.

Maritime UK is acting as the focal point to ensure that employers across the sector see the value of apprenticeships, and employ more apprentices.

Apprenticeships

Former Shipping Minister John Hayes set employers a target during London International Shipping Week 2017 – to double the number of apprentices they employ.

He was launching the joint Maritime UK/DfT booklet on apprenticeships, and asked 'every maritime business, whether they pay the Apprenticeship Levy or not, to discuss how apprenticeships can help them succeed by growing the next generation of talent'.

The drive to increase the number of apprentices employed is a major focus for Maritime UK and a key part of that is explaining their value, says Iain Mackinnon, secretary of the Maritime Skills Alliance.

"I see apprentices as a valuable tool for employers in achieving their people goals – not just for the sake of it, but because you need skilled, talented people," he says. "You need to show potential apprentices a career path and structure in order to attract them."

Mr Mackinnon, who coordinates apprenticeship work on behalf of Maritime UK, describes the government's rules as 'like the Highway Code – the employer is in the driving seat'.

"In the industry, there are some terrific champions who are pushing things hard – they see the opportunity. And there are others who don't yet 'get it' and need more persuasion and discussion to help them understand what apprenticeships are and how to go through the different steps."

There are myths to be dispelled, he says, not least that apprenticeships are only for school-leavers in entry-level positions. Apprenticeships can be suitable for much more senior roles, where what's required is a longish period of carefully structured training towards defined objectives, where what's on offer is some subsidy from the government – and where there's no need at all to call those involved 'apprentices'.

Different working groups are therefore busy looking at the potential of using the apprenticeship approach to train marine pilots, port marine operations officers, technical superintendents and marine surveyors. The potential is significant.

Measuring progress against the target is a challenge, says Mr Mackinnon. "At present there are no good statistics on maritime apprenticeships that we can usefully refer to.

"We are working towards a set of data which covers all the bases within Maritime UK's definition of 'maritime'. We need to gain sufficient detail so that we have a good grip on what's really going on and do not mislead ourselves. We are therefore meeting soon with the statistics team at DfT to find a better way forward."

As Maritime UK continues to press home the value of apprenticeships, key focus areas are ensuring that good quality information is readily available, giving presentations to employers, putting out indirect messages to employers through the trade press, and one-to-one discussions.

"It is about reviewing old standards, dispelling myths, promoting the whole notion of apprentices. The extent of current action to promote apprenticeships to employers varies a good deal between different parts of the sector."

All the copies of the apprenticeships booklet launched at LISW were snapped up and that is encouraging, says Mr Mackinnon. "Part of the task is to reach those who do not normally think much about skills, and the Apprenticeship Levy certainly helps with that; it's focusing minds."

Trinity House - the potential offered by the apprenticeship approach is considerable.



Trinity House runs a number of shore-based apprenticeships aimed at young people looking for a step in the right direction.

SPOTLIGHT: Trinity House apprentice Jack Lawson talks about his working experiences.

"Definitely the way forward"

Jack Lawson describes his four-year apprenticeship with Trinity House as an 'eye-opener' – in more ways than one. As a lighthouse technician apprentice, his job takes him to some pretty special places. Meanwhile, he has learned about the shipping and maritime world – and hopes to stay within the industry.

Jack, who is 21, grew up in Swansea, studied for a BTEC level 3 extended diploma in engineering and started work for a local civil engineering firm. A family friend told him about the opportunity for an apprenticeship with Trinity House.

"I knew nothing about Trinity House and knew nothing about the shipping industry," he says. "In the past four years, I have gained a real understanding of how the shipping and logistics industry works – it was something I took for granted before, not thinking about how the things we buy actually arrive."

Based in Swansea, Jack is part of Trinity House's Field Operations West, which covers a region stretching from Cumbria to north Devon. The team carries out electrical, mechanical and minor general maintenance work on all of the lighthouses within its area, and this includes some lighthouses offshore and further afield.

Last year Jack was part of a team that spent three weeks modernising the lighthouse on Sark, in the Channel Islands – a posting which meant staying in the lighthouse keepers' accommodation.

"Our schedule includes two planned visits a year to each lighthouse, for technical inspections, testing, reporting any issues, etc., following up with a corrective maintenance trip to remedy any faults," says Jack. "When we do a modernisation project, we strip out the old technology and install the new system. Some of the lighthouses are still using older technology – all are being upgraded and modernised."

Jack is often away for the whole working week, returning home for week-ends. Alongside the day-to-day work, he is studying for an HNC in electronic engineering – distance learning is the solution to fit around the travelling, and a course assessor comes to see him at regular intervals.

Jack's apprenticeship will finish in August 2018 and he is hopeful that a permanent post will be available for him after that. "I like what I do – everywhere you go, I have a different view. And an obvious selling point is that I often travel around in helicopters and boats!"

As for the long term, he says: "I have big respect for the shipping industry and all the obstacles it overcomes, and I enjoy being by the sea – I think I will stay in the maritime industry.

"Going through this apprenticeship has been so beneficial for me. Trinity House is a great company and has met all my training needs. Every individual has their own path – but for me, as a hands-on person, an apprenticeship was definitely the way forward. If there are others thinking of this route – it is a great route to take!"

In its capacity as General Lighthouse Authority, Trinity House employs a variety of apprentices, including in the buoy yards, stores and IT as well as lighthouse technicians. In its role as a maritime charity, Trinity House also sponsors 30 new cadets every year as part of its Merchant Navy Scholarship Scheme.

"Each individual has their own path...if there are others thinking of this route – it is a great route to take."
Jack Lawson
Trinity House apprentice





SPOTLIGHT: **Associated British Ports apprentice Abbie Jones.**

"An amazing opportunity to develop skills"

Having completed her GCSEs at school in Southampton, Abbie Jones was looking into the possible paths towards a career in engineering. An apprenticeship with Associated British Ports (ABP) fitted perfectly.

"I liked the idea that no two days would be the same – packed with adventures and challenges, so that I could never get bored," she says. She decided to write a weekly blog about her experiences as an apprentice engineering technician at ABP's Port of Southampton.

From shadowing the maintenance team as they tested electronic equipment on the quayside, to a day on the water with the hydrographic team surveying the sea bed, to scanning cars in the storage compound – clearly, she has found the variety she was hoping for.

Abbie was 17 when she began her training with ABP in 2017, studying in parallel for BTEC and NVQ qualifications at Southampton Engineering Training Association.

"I enjoy constantly learning new things and finding out more about the many different aspects involved in electrical and mechanical maintenance, especially in the context of ports," she says. "I chose to begin an apprenticeship rather than follow the traditional degree route because I was hoping it would provide me with real world experience and equip me with the right skills for a successful career, backed up by a nationally recognised qualification."

Another obvious benefit, she says, is earning while you learn. "Apprentices don't have to pay fees for their tuition and are treated as regular employees, unlike a university degree, which could cost thousands of pounds."

Abbie has spent time with the Vessel Traffic Services (VTS), port operations and project engineering teams, been out on the launch to pick up a pilot, and been through an environmental briefing. She has learned about health and safety, safeguarding and security at the port.

"In between the various departments I visited, I have spent the rest of my time with the maintenance department, which I am an apprentice for, training to be an electrical/mechanical maintenance technician," she says. "I have shadowed many jobs, such as relays being replaced, a jib crane being dismantled and crane generators being serviced. Everyone I have worked with has been really supportive."

An apprenticeship is, says Abbie, 'an amazing opportunity to develop skills you didn't even know you could gain or were capable of'.

"By the end of it, you will have such a large skill set that is very valuable in this industry. Once I have completed by apprenticeship, I want to develop my career within ABP, gain lots of experience and skills, and hopefully progress through the company ranks."

> **"I enjoy constantly learning new things and finding out more about the many different aspects involved..."**
> **Abbie Jones**
> **Apprentice with Associated British Ports**

The chance to become part of a close-knit and friendly company by becoming an ABP engineering apprenticeship.

SPOTLIGHT: Mac Bierowiec, apprentice at Seadub in Southampton.

Finding the perfect niche

Mac Bierowiec learned an important thing at university – that the degree route simply wasn't for him. He gave up his course and went travelling in Australia for three years, teaching himself some mechanical skills and working in a series of garages along the way. Back in the UK he focused on vintage car restoration.

And then, aged 24, he found his niche – as an apprentice at Seadub, the Southampton-based precision engineer company which serves the superyacht and marine industry.

Mac says he has always been passionate about engineering and all things mechanical. However, as a capable student at school he was steered firmly towards university.

"At school we were told that if you are bright you will go to university…and even if you scrape in, that's OK," he says. "Apprenticeships were presented in such a bad light, portrayed as only for less able kids. The message was that if you were not going to university, you were no good. That is totally wrong, because it strangles people."

Seadub is a relatively new company, having been set up in 2011. Mac was introduced to owners Chris Whitwam and Katie Charge. "I emailed asking if they would take on a slightly older apprentice with some transferable skills – we had a chat, I did a trial week, and I started my apprenticeship."

Mac works in all areas of the business four days a week and spends one day a week at college, where his course covers CNC machining, maths, physics, drawing, health and safety, and other topics.

An NVQ assessor comes to see Mac in the workplace once a month.

"It will take two years for me to achieve my Level 3 NVQ, and after that I would love to have further progression lined up with a college together with Seadub's support – Level 4 is a further two years," says Mac. "It has been a revelation – applying the theory to the physical work and being involved in the whole process, from design right through to manufacture and testing, including some really large projects.

"Seeing something through from start to finish, rather than just slotting into one department or one part of the work is so rewarding. We work with a variety of materials, including aircraft standard aluminium, titanium and stainless steel. Nothing gets 'samey' – the variety is really enjoyable."

Mac, who moved from his family home in Suffolk to take up the apprenticeship in Southampton, says: "It is a shame there hasn't been more focus on apprentice-ships.

"I wish I had done something like this straight out of sixth-form. An appren-ticeship like this means you are so well set for the future in terms of skills and experience."

Seadub Limited encourage input and suggestions from employees.



On the Humber: Scott Arrowsmith says his Facebook page has become all about pictures he has taken of vessels.

SPOTLIGHT: Scott Arrowsmith, apprentice at SMS Towage on the Humber.

Pulling ahead

Scott Arrowsmith isn't one to sit about. From the age of 16 he had a weekend job at KFC and, when he finished his full-time education at 18, he was offered a managerial position with the company.

He progressed through other managerial posts in the hospitality and catering sector – but found himself behind a desk, nine to five, "and that really wasn't what I wanted", he says.

By chance, Scott saw an advertisement on Facebook – SMS Towage, operating on the Humber, was looking for apprentices. "I thought this was right up my street. I live in Grimsby. I wasn't sure what I wanted to do. But I saw this advert and the more I read into it, the more I realised this was what I wanted."

After an interview with the hiring manager and a tug skipper, and an induction day, Scott was delighted to be offered a one-year apprenticeship with SMS, from September 2017.

"I started with three months at college in Whitby, with exams in December. I passed my exams and was then back onboard the tugs and it has been pretty much all practical work since then," he says.

SMS provides towage services for a huge variety of vessels heading to and from the Humber, including the ports of Grimsby, Immingham and Hull. As part of the crew, Scott spends two-week spells living and working on the tug.

"We provide towage for passenger ships, car carriers, oil tankers, cargo ships – any type of vessel coming into the river, the chances are we will be bringing it in or taking it out," he says. "I will be on the deck connecting the heave line to the messenger line, or on the winch controlling the tow rope between the two vessels. We also do a lot of maintenance and cleaning of the tug, as well as actual towing."

Scott, who is now 23, says his goal is to become a skipper of tugs himself – "It is really exciting," he says.

He already has qualifications in radio work; when he finishes his apprenticeship, he will have gained a Level 2 qualification in workboats.

"I would recommend this route to anyone," he says. "It isn't what I expected. I thought an apprenticeship would be a lot of classroom studying, but it is the opposite. It is being out there and being treated as an employee, and you learn such a lot. I am really happy with SMS – they are a great company to work for."

Scott says that despite living in Grimsby, he previously knew surprisingly little about shipping. "I had no idea what happens in the industry. But the more I learn about it, the more I enjoy it. My Facebook page has become all about pictures I have taken of vessels. It is part of my life now – and I wouldn't look back."

> **"I would recommend this route to anyone. It is being out there and being treated as an employee, and you learn such a lot."**
>
> **Scott Arrowsmith**
> **SMS Towage apprentice**



Realising the coastal powerhouse

As an island nation, the sea has always been a provider of prosperity and partnership, and there's never been a more important time to unleash the sector and transform the fortunes of our coastal communities.

Reimagining coastal communities **79**
Bringing the UK's maritime regions together **81**
Maritime UK Industry Awards **83**
Joining the dots **85**
Clusters: Scotland, Mersey and Solent **87**

Hutchison Ports' Port of Felixstowe. Approximately 13 hectares of new paved container yard is to be constructed directly behind Berth 9 at the UK's largest container port.

British industry understands the breadth of the opportunity available if we can mobilise our coastal communities.

Reimagining coastal communities

The British public vote for Brexit sent shockwaves around major cities throughout the globe. However, in many of our coastal communities in the UK, the result came as no surprise at all. Indeed, out of the top five areas to vote leave in the country, every single one was a coastal town or city. Compare this with the top five spots to vote remain in England, Scotland and Wales, where no coastal constituency features on the list.

For many of these coastal communities, people feel left out and left behind. Traditional industries have often departed and, whilst some new sectors such as renewable energy have arrived, many of the lost jobs and investment have not been replaced. A report commissioned by the BBC found the mean salary in Scarborough in 2016 was £19,925, nearly a third less than the national average, while data from the Office for National Statistics showed that in 2016 economic output per person was 26% lower in coastal communities than non-coastal communities. Across a range of economic and social indicators, we are seeing a widening gap between many coastal communities and their inland counterparts. In the face of such change and challenge, it is perhaps not surprising that coastal communities voted for change.

For the United Kingdom, these coastal communities have long served as the historical heartbeat of the nation and, despite a long and varied history, the UK has always had one constant. It has been inextricably tied to the seas that surround it.

As an island nation, the sea has always been a provider of prosperity and partnership, and there's never been a more important time to unleash the sector and transform the fortunes of our coastal communities. Maritime UK figures estimate that the sector supports £40 billion in value to the UK economy in 2015 and supports a million jobs across the UK. The sector has a unique capacity to kick-start a renaissance in the fortunes of those communities and awaken a new coastal powerhouse.

The potential is enormous. The maritime sector boasts productivity 53% higher than the national average. On top of this, the average maritime sector job generated £77,897 in value to the economy in 2015. Compare this to the average job in the UK economy which generated £50,800 – that's a third less.

The ports sector alone already invests more than £600 million per year in coastal areas and is ambitious to do more. The launch in 2018 of the RRS David Attenborough is a fitting example of the UK's high-value ship building capabilities, alongside the UK's world-leading superyacht manufacturers. Through these industries the Maritime sector is committed to high skill levels and high-quality apprenticeships, providing year round jobs. And developing skills and infrastructure benefits not only the maritime sector – the new road to a boat yard or port is also the one that brings in more tourists or takes out manufactured goods and food products.

The process to transform these communities isn't some far-flung pipe dream, nor does it require huge investment and resources from government. It does, however, require a number of specific changes and support for initiatives to unlock private investment and deliver growth. The three key areas that require change are:

- Investment in connectivity and infrastructure
- Creation of a pro jobs and trade planning environment to boost investment and development
- Support for industry-led maritime clusters embracing local government and academia

British industry understands the breadth of the opportunity available if we can mobilise our coastal communities and is working collaboratively to realise it. The maritime sector is developing a compelling case to government via an industrial strategy sector deal. government ministers have signalled their support and we now have the very real opportunity to transform our coastal communities.

This transformation will require more than direct boosts to investment and jobs around our coast – it requires us to look to the technologies of the future to place these communities at the cutting edge of the sector. This is already happening. The maritime sector is bidding to co-fund a new national centre for maritime research and innovation which would bring together the UK's leading maritime academic and research institutions, most based in coastal communities.

Together, industry and academia can tackle challenges including autonomous and green shipping as well as how we clean plastics from the oceans. government's own Foresight Future of the Sea report predicts the global ocean economy will total a staggering $3trillion by 2030. By leveraging existing expertise and collaborating in a joined-up way, we can win a sizeable slice of the international pie for the UK and our coastal communities.

We continue to argue for a pragmatic and sensible Brexit deal. However, regardless of what type of relationship we secure with Europe, it will become increasingly important to leverage our international comparative advantage in those sectors in which we excel. Maritime is certainly one of these sectors.

Our ability to reimagine coastal communities into a coastal powerhouse not only looks to redress socio-economic imbalances, but to fuel major growth across the whole country in a natural British industry. Spreading growth across each region can bring the country together, ensuring we tackle our future as an outward-looking global trading maritime nation, together. Our coastal powerhouses hold the key to a truly prosperous, global Britain.



Milford Haven, Pembroke Dock.

The newly established Maritime UK Regional Council seeks to enhance both the UK's maritime offering as a whole and those of the marine cluster organisations that are part of it.

Bringing the UK's maritime regions together

Maritime clusters bring together different maritime-related organisations, which usually derive from a particular geographical area, to act as representative and promotional bodies for these parties.

These clusters act as a voice for the interests of their members, often also seeking to enhance and develop the maritime offering of the area they cover. Though the existence of cluster organisations for the nautical sector is a relatively new development, the UK maritime industry is one of the world's most-prominent maritime sectors — and so it is unsurprising that it has embraced maritime clusters as a means of enhancing the services of the country's different marine hubs.

Up and down Britain, different organisations, focused on some of the UK's most substantial maritime regions, are working to optimise those areas' contribution to the nautical world and bring benefits to the maritime companies that they have under their umbrella. An example of such a body is the Team Humber Marine Alliance, a not-for-profit business development organisation that focuses on the Humber region. Members of the grouping include Associated British Ports, Blue Water Shipping and Siem Offshore Contractors, while UK partners and affiliations include Hull City Council, the University of Hull Business School and East Riding of Yorkshire Council. On the other side of England, in Cornwall, the Cornwall Marine Network seeks to boost the prosperity of its member companies, with firms like the Cornwall Apprenticeship Agency and the Cornwall Marine Academy included in the group. The association was formed with the intention of giving an identity and a voice to marine companies in the county.

"The cluster model is important because it is based on the whole industry working together, as opposed to sub-sectors working in isolation," says Chris Shirling-Rooke, the chief executive of Mersey Maritime — a cluster organisation for the maritime industry in the Liverpool City Region. "The cluster programme supports a holistic view of the maritime ecosystem, unearthing gaps in the supply chain and collectively finding solutions, that ultimately leads to growth and the creation of jobs within the sector."

Meeting of minds

The first meeting of the Regional Council saw representatives from maritime clusters across the UK, including those from the Solent, East of England and South Coast groupings, come together at the Maritime Knowledge Hub at Liverpool John Moores University. Those present agreed on a number of actions, including enhanced communication between clusters and national bodies. Another action point from the meeting was focusing on ensuring that the individual offer of each cluster is properly communicated as part of the UK package when promoting the UK to overseas customers.

"What was clear from the first meeting is that each cluster is unique, with different priorities and at varying stages of development within their geographical regions," said Mr Shirling-Rooke. "The challenge for the working group is that we put our own priorities to one side and look at how, as a collective, we can help to shape the UK maritime sector as a whole." The chairman added that the experience that Mersey Maritime has developed across its 15-year lifespan is being used to aid the additional development of new regional clusters all over the UK.

Additionally, Mr Shirling-Rooke said that the Maritime UK Regional Council would consider the concept of a "cluster of clusters" to bring together maritime offerings from different countries across the world to share best practices internationally.

"The key priority at this stage is to share best practice and encourage collaboration across clusters," he explained. "However, we do want the UK to continue to be recognised internationally as not just having the best regional clusters, but also having the best-joined-up, like-minded, business-friendly cluster of clusters."

Maritime UK will ensure that clusters are involved with national programmes, and that individual clusters and their initiatives are showcased through the organisation's promotional channels.

Additionally, with the UK government's Building Our Industrial Strategy Green Paper from 2017 having invited sectors to come forward with proposals to transform themselves using "Sector Deals", the Regional Council will make sure that the clusters are involved with Maritime UK's development of a Maritime Sector Deal.

Peel Ports Liverpool Port, one of the largest, busiest and most diverse ports in the UK which sits on both sides of the River Mersey.



A celebration of excellence across the maritime industries.

Maritime UK Industry Awards

In 2019, Maritime UK is to launch its industry awards. Unlike some events run by commercial outfits, the awards will be delivered by industry, for industry.

The awards will be hosted on a rotational basis by a different regional cluster organisation.

2019's will be hosted by Solent LEP alongside the Southampton Boat Show, and in 2020 by the South Coast Marine Cluster in Plymouth to coincide with the Mayflower 400 celebrations and the Marine Tech Expo.

The awards will celebrate excellence across a wide range of categories designed to highlight the breadth of depth of the UK's maritime sector – both in terms of part of the industry and geography. Rather than being a stand-alone evening event, the awards will engender activity throughout the year, both in terms of a formal launch event in London and profiles and case studies for entrants and shortlisted companies.

Progress by companies participating in the Women in Maritime programme will also be celebrated at the awards.

The awards programme is designed to bring various parts of the country together and it is envisaged that they will help build an innovation fund for UK companies to tap into. Sponsorship opportunities will be available via the Maritime UK website.

London Medway Port.

Strengthening and creating new clusters

Maritime UK has determined that it should deliver a programme of regional cluster development in order to drive sector growth across the country. Therefore, the promotional body has recently established a board that seeks to bring the nation's nautical cluster organisations into its collective work. The Maritime UK Regional Council pulls together maritime clusters from across the UK to foster collaboration and lead development in the country's marine sector. It offers the UK's different nautical areas the chance to interact and collaborate with one another for the enhancement of the maritime sector as a whole, as well as giving participating clusters the opportunity to boost their individual maritime offerings.

Chaired by Mr Shirling-Rooke, the board was created in response to Maritime UK's 2017 Strategic Plan. The roadmap's fifth objective was the provision of a regional cluster development programme to serve as a trailblazer for growth in the UK maritime sector. The objective had three subsections: for Maritime UK's membership to become truly representative of the UK as a whole; for the organisation to establish a membership structure for regional clusters, which could co-ordinate activities and share best practice; and for the body to take advantage of regional funding and political support, plus the agility of smaller regional organisations, in order to build regional strategies and deliver growth aims in a faster manner. Now, the Regional Council is well on its way to becoming a hub for UK maritime clusters, having held its first meeting at the end of January this year.

"Maritime UK already brings together the key organisations from the four maritime industries, and this initiative reflects the fact that there are a number of regional cluster organisations that should be part of our collective work too," says Ben Murray, Maritime UK Director and the Council's secretariat. "Not only does this increase collaboration, and help us to deliver our collective growth ambitions, it also means that we're able to respond to the changing devolution landscape in the UK to support and benefit from regional programmes from increasingly-powerful regional government."

A new report from the UK Department for Transport sheds new light on English port connectivity.

Joining the dots

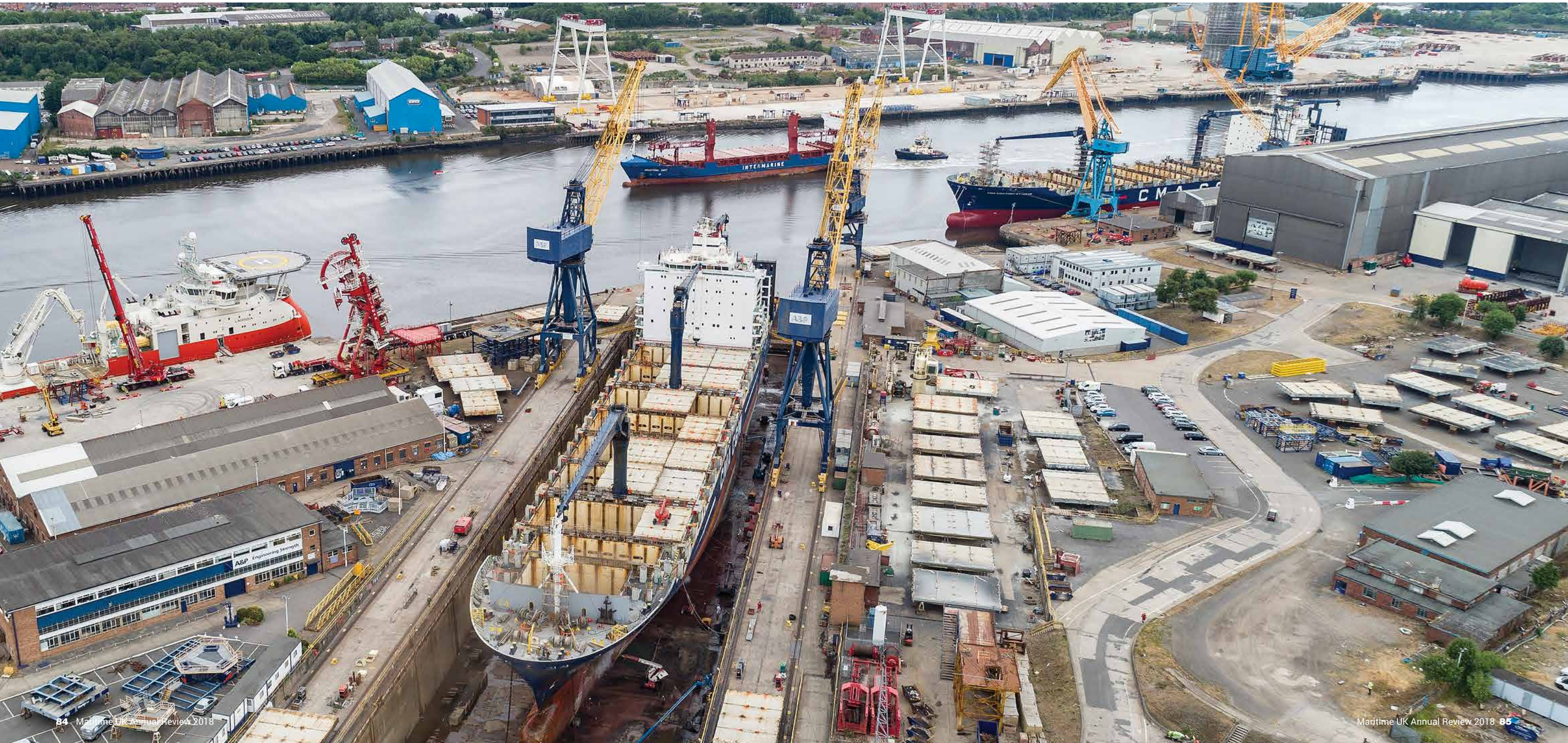
With approximately 95% of all goods entering and leaving Britain moved by sea, the role British ports play as facilitators of trade cannot be understated. Yet, UK ports have been somewhat of an unsung hero when it comes to keeping their nation's economy afloat.

"With ports located at the edges of the country and operating seamlessly in secure environments, their contribution to our prosperity often goes unnoticed by the public, the business community and even perhaps by the wider political spectrum," the UK government's maritime minister Nusrat Ghani has noted.

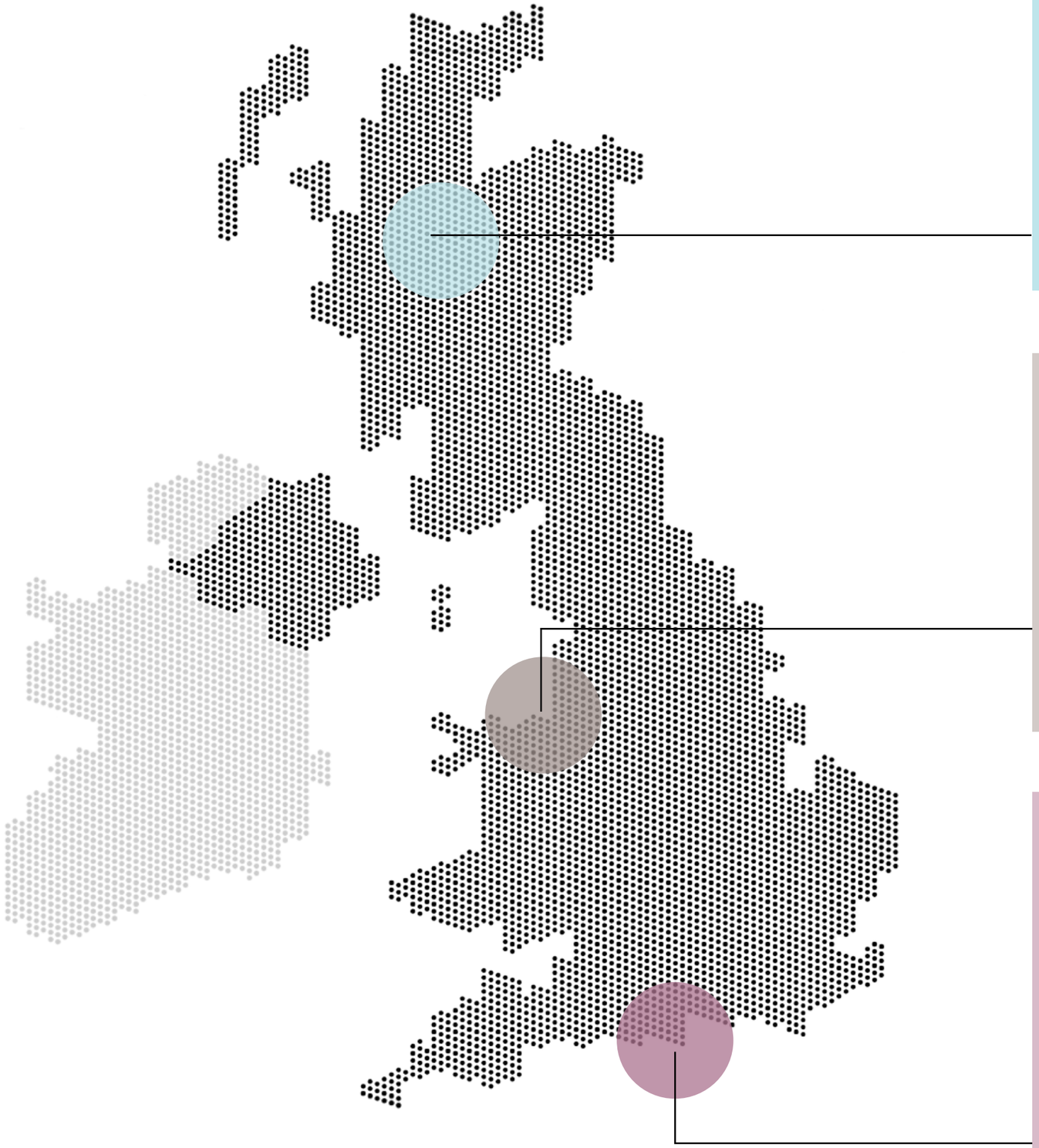
The Department for Transport Parliamentary Under-Secretary of State made the comment in a ministerial foreword to a report by her department which explored English ports' access requirements both now and in the future. The document, Transport Infrastructure for our global future: A Study of England's Port Connectivity, was commissioned to look into the current level of access to ports and the management of port connectivity problems, as well as ports' future development plans and ambitions. The report, which featured Maritime UK research, also looked to obtain a better understanding of the key transport and economic corridors serving English ports to highlight port connectivity's advantages for UK plc and to increase the profile of the port sector's "vital underpinning role".

The Study was styled on a two-pronged approach that covered both evidence and data-gathering and stakeholder and industry engagement. Priority issues raised by both ports and the broader supply chain were transformed into a set of recommendations that look to ensure that freight connectivity to and from England's major ports will catalyse trade and economic growth, as well as boost productivity and inward investment. The report claimed that recognition existed within the UK government of the need for more work to ensure that port and freight connectivity gets the attention it warrants and that its crucial part in the UK's national trading infrastructure is "preserved and enhanced".

The report had seven key recommendations. The first concerned the idea that ports are unable to operate in isolation, or that freight needs to be considered in a more holistic manner, while the second centred on constructing a base of evidence for ports and freight. The third was about understanding waterborne freight's potential, while the fourth focused on "ensuring ports are consistently part of investment, infrastructure and planning processes". The fifth recommendation said that "enriching port communication" is a sector job, but the sixth centred on this task also being something for government to adopt. The final key recommendation focused on the idea of "informing the long-term view", such as the port contribution to Maritime 2050, a long-term strategy to secure the UK maritime industry's future.



A&P Tyne is the largest commercial dry dock on the east coast of England.



Scotland sails into clustering

The Scottish Maritime Cluster is one of the UK's younger marine clusters, having started out at meeting in 2016 and becoming legally established in 2017. The cluster was initially promoted by a group of Scotland's senior maritime leaders, that recognised an increasing requirement for collaboration to help grow and sustain the Scottish maritime sector.

"We realised that while competitors in some areas, there is more that binds us together," says Patrick Carnie, one of the directors of the association, which is chaired by Douglas Lang. "We also realised that in Scotland, we have a complete through-life engineering-capability, supported by shipowners, ports and other related services."

The cluster's main focus is business growth through sales and led by industry, while its main goal is economic growth for the companies that are part of the organisation.

"Attaining recognition in Scotland is a significant step forward," says Mr Carnie. "However, for many of the members, being part of something that can assist them [in punching] above their weight in the UK, European and worldwide markets is a requisite for adding economic value."

To help with this process, the cluster is undertaking or supporting several ventures. These include engendering interaction between a multitude of Scotland's companies with maritime-related business; co-operating with industry bodies like Maritime UK; and appointing a consultancy to explore the cluster's marketplace and help the cluster develop strategies that will support its objectives.

Mr Carnie says that the cluster is focusing its energy on "identifying suitable and worthwhile growth opportunities" so that it is well motivated in these early days.

Examples of work previously undertaken by the organisation include co-operation with the University of Strathclyde to establish a new research and innovation centre, and contribution to Maritime UK's Maritime Sector Deal development.

Supporting Mersey's maritime aspirations

As one of the UK's most well-established maritime clusters, Mersey Maritime works to help support the growth and operational excellence of the maritime sector within the Liverpool City Region (LCR). The organisation, which was created in 2003 in response to disparity, plus a lack of communi-cation, across the maritime sector in region, co-operates with members, partners and stakeholders to create a global centre of excellence within the region. That centre supports innovation, skills, training and entrepreneurs and additionally influences regional and national policy. The association hopes for Liverpool to once again be recognised as a global maritime city.

"Mersey Maritime provided a platform for networking, collaboration and common goals — such as skills and training — but it also gave the industry a voice to promote the city region as a maritime centre of excellence," says cluster chief executive Chris Shirling-Rooke, reflecting on the organisation's early days.

He believes that any successful maritime cluster is epitomised by three areas: job creation and growth, innovation and skills, and political impact – all areas that Mersey Maritime has consistently nurtured.

Over the last five years, the association has grown significantly, seeing its membership increase from 40 to 200 and becoming financially viable, with a shift in the amount of funding from 80% to 10%. Additionally, the cluster is one of the core partners in the £25m Maritime Knowledge Hub at Liverpool John Moores University, which will bring together the best of local government, industry and academia to nurture both local and national maritime sectors. The centre will be available for use to other clusters and industries across Great Britain, with the project supporting the generation of some 1,063 gross employment opportunities.

Solent's premier gateway aspirations

The Solent is inextricably tied to the sea, historically and economically. Its coastal location, sheltered havens and double tides set the area apart from others and give it a unique identity that shapes its industry and people. This, together with a longstanding clustering of businesses, innovation, research and educational strengths has cemented the Solent as an internationally recognised area for maritime and places it at the heart of the UK's marine and maritime sector.

With unparalleled assets - from Southampton Marine and Maritime Institute, Warsash School of Maritime Science and Engineering, National Oceanography Centre, Lloyd's Register, National Marine Autonomy Centre, home of INEOS Team UK, and leading -edge businesses such as MHI Vestas Offshore Wind, ASV Global, and more - the Solent is a world class maritime hub, home to maritime innovation, pioneering new approaches to autonomy, environ-mental innovation and design. Home to three universities with specialist marine capabilities, the Solent is in the vanguard of innovation and technology for the marine industry, and offers an unrivalled support network for our businesses.

The Solent's international gateways - Port of Southampton, Portsmouth Naval Base, and Portsmouth Commercial Port - form a critical part of the UK maritime offering. Southampton is home to a world-leading cruise industry worth over £350m per annum to the local economy. The city is the UK's leading port for vehicle imports and exports, and home to the UK's second largest container terminal. Less than 20 nautical miles from the Shanghai-Rotterdam trade super-seaway, the port is the key artery through which the UK exports to the world. Portsmouth Naval base is the home of the Royal Navy and heart of the Solent's world-leading defence cluster, including BAE Systems, QinetiQ, Lockheed Martin, Northrup Grumman, Rolls Royce and Airbus.

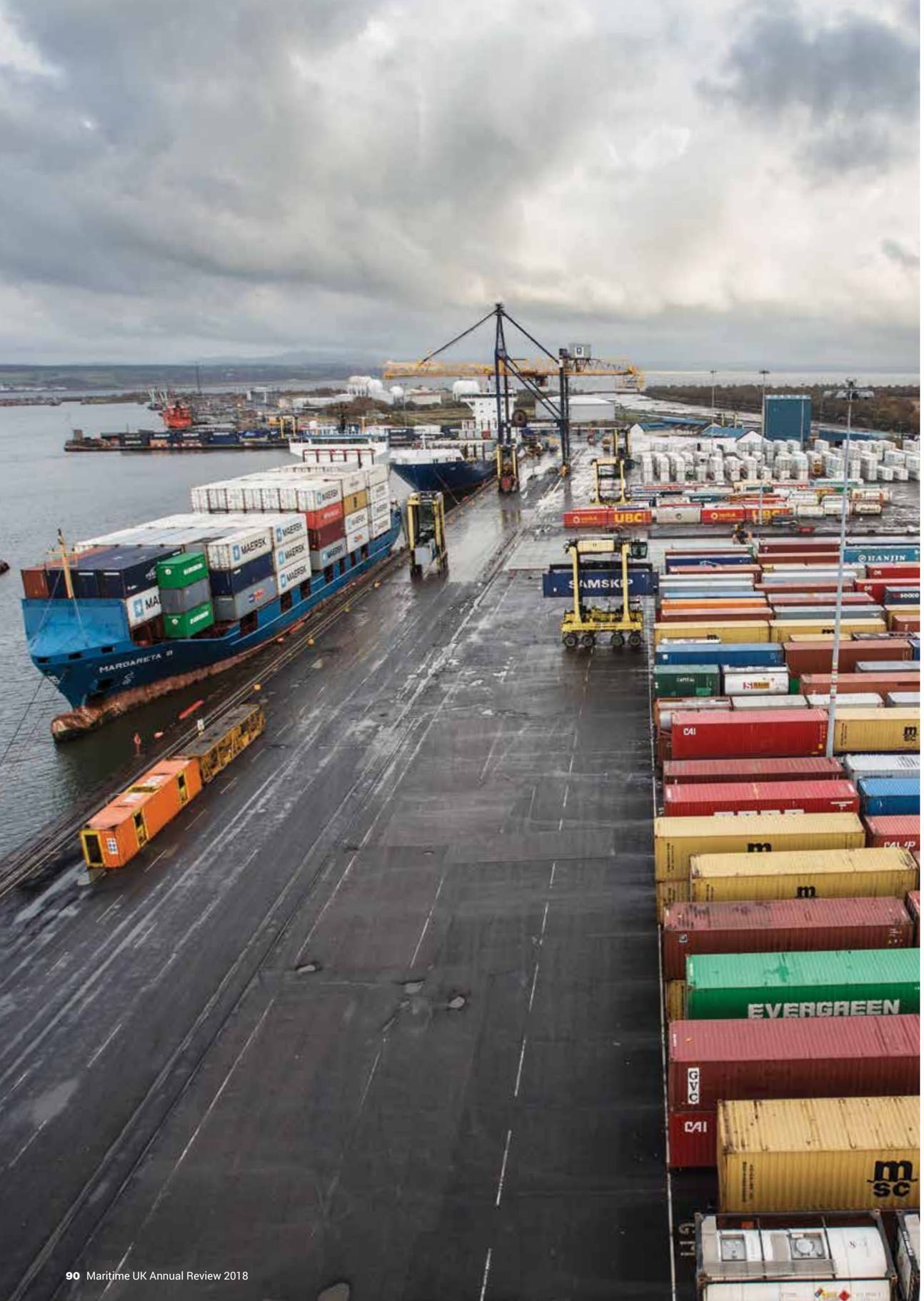
The Solent marine offering includes a leading technology cluster, an Enterprise Zone dedicated to marine engineering and advanced manufactur-ing, outstanding marina facilities at a range of locations and host of internationally recognised marine events such as the Southampton Boat show, America's Cup and Cowes week.

State of the industries

We hear from Maritime UK's national members on the latest developments in their part of the maritime sector.

Shipping 91
UK Chamber of Shipping 91
Cruise Lines International Association 93
Nautilus 95
Trinity House 97
Ports 99
British Ports Association 99
UK Major Ports Group 101
Services 103
Institute of Chartered Shipbrokers 103
Maritime London 105
The Baltic Exchange 107
Engineering 109
Society of Marine Industries 109
Leisure Marine 111
British Marine 111

Cruise ships at Southampton.



Port of Grangemouth container terminal, Scotland's largest container port.

There is a growing understanding that shipping, maritime and the sea are important.

UK Chamber of Shipping

There is a clear relationship between profile and influence, says Bob Sanguinetti, CEO of the UK Chamber of Shipping – and the developments and achievements of the past year have demonstrated that.

"The idea that the shipping industry can't raise its profile has been proved to be untrue," he says. "You need to be out there with a clear message. High-profile, vocal industries are always at the top of the red box, and we are beginning to reap the rewards of a higher profile in the policy context."

Over the past three years, the UK Chamber has become one of the most high-profile industry bodies in the country in terms of national media coverage. In 2013, the Chamber was mentioned on ten occasions in the national media; in 2017, that number rose to 230. If broadcast and syndicated news is included, the total was 1,500.

"Bit by bit we are turning ourselves into a lobbying force – and we know that played a part in our success with SMarT Plus," says Mr Sanguinetti.

More than half of the UK Chamber's media coverage has related to Brexit – hardly surprising. But the issue has certainly focused minds on trade. An opinion poll in 2017 showed that 89% of MPs and 83% of the public identified the shipping industry as being the prime mover of the UK's international trade. "There is a growing understanding that shipping, maritime and the sea are important – it is good to harness that understanding and shape it towards policy goals," he adds.

Membership support

The UK Chamber's membership has continued to grow, with maritime companies benefiting from one-to-one support on issues ranging from the Maritime Labour Convention to taxation and the challenges and opportunities posed by Brexit.

Its Introduction to Shipping course aims to fill the gaps in knowledge of younger staff and industry newcomers and foster their confidence. "We wish to build on the success of this course and we are actively looking at new ways to expand this offering to engage people who might think the Chamber is 'not for them' – because it is," says Mr Sanguinetti.

Safety and mental health

Meanwhile, through its Safety Culture work, the UK Chamber is changing the way the shipping industry thinks about safeguarding its workforce. A Safety Culture at Sea event was held on board the Saga Pearl II cruise ship in autumn 2017. The Chamber has also been active on seafarer mental health, drawing up guidelines to help members develop their own internal mental health policies.

United for Wildlife

Finally, the UK Chamber was one of the first signatories to United for Wildlife's Buckingham Palace Declaration, an action plan to tackle the trafficking of illegal wildlife products. Prince William, Duke of Cambridge, who is President of United for Wildlife, addressed the Chamber's annual dinner in February 2018.

The UK Chamber's membership has continued to grow, with maritime companies benefiting from one-to-one support

Clydeport is the busiest cruise terminal in Scotland and home to some of the biggest, deepest, busiest and most advanced facilities.

In all, 114 different ships from 52 cruise lines called in 55 British ports during 2017.

Cruise Lines International Association

The cruise industry is an exciting and fast-growing one in which the UK plays a leading role – as a major source market, an attractive cruise destination and a base for many of the world's cruise companies.

In short, cruising is a particular success story for the UK and there is every reason to expect further growth, says David Dingle, who is vice-chairman of Cruise Lines International Association (CLIA) Europe and chairman of Carnival UK.

"The direct economic benefit of the cruise industry to the UK is £3 billion, and the total benefit is £7.5 billion," he says. "This comes from the cruise companies which have based themselves in this country, the distribution of cruises to UK cruise customers, the expenditures by passengers when visiting UK ports or when starting and finishing their cruises at those ports, and the storing and maintenance of the cruise ships based here."

Some 74,000 British jobs depend on the cruise industry, and for every £1 spent on a cruise, £2.70 is contributed to the British economy.

In 2017, 1.96 million cruises were sold in the UK, continuing the long record of year-on-year growth. Half of these started in a British port, whilst the others were fly-cruises. A particularly significant development for the UK is the increase in inbound cruise tourism – overseas visitors coming into the UK. "The numbers have been growing on average 18% over the past five years, so inbound cruise tourism is really flourishing," says Mr Dingle. More than 1.2 million visits were made to UK ports of call last year. In all, 114 different ships from 52 cruise lines called in 55 British ports.

The cruise industry also has a large business base in the UK, from where ships are strategically, commercially and operationally managed. Carnival has a major listing in London – its UK interests comprising the P&O and Cunard brands are fully managed here – and Royal Caribbean has a substantial establishment in the UK. These two, as well as MSC Cruises and Saga Cruises, have many ships entered into the UK tonnage tax. Fred. Olsen and Thomson Cruises are also headquartered in the UK. "Britain is a true world centre of cruise business, and more and more cruise companies are looking our way," says Mr Dingle.

On the 'ask' list? "Whilst the movement of cruise tourists in and out of the country post-Brexit is likely to remain unchanged, as an international industry we seek no future impediment in bringing essential foreign nationals to work in the UK. Also, we are anxious to ensure that Brexit does not disturb longstanding Customs arrangements which have removed any complexities in the handling of ship's stores.

"Cruising is a vitally important growth industry, fully supporting new government opportunities such as apprentice schemes and the announced increase in SMarT funding for training. In turn, we seek government assurance that we will continue unimpeded in the post-Brexit world."

The government must follow through on SMarT Plus by setting clear targets for recruitment, says union.

Nautilus

Securing the SMarT Plus package of increased support for UK seafarer training was a major victory for the maritime professionals' union Nautilus International. But, the union warns, the struggle to rebuild the UK seafarer skills base is far from over.

The Department for Transport's annual seafarer statistics show that UK officer cadet numbers have fallen for four years in a row and forecast that, based on current trends, the number of UK deck and engineer officers is set to fall by more than one-third within the next decade.

Nautilus general secretary Mark Dickinson describes the figures as 'deeply disturbing' and says they demonstrate the urgent need for shipping companies to deliver on the promises to boost training numbers in return for the increased SMarT budget.

"Around 4,000 UK officers are due to retire over the next five to ten years, and the numbers coming in are well short of what's needed to fill the hole that will create – or to make up for the generation gap caused by the drastic decline in training during the 1980s and 90s." he adds.

"Now is the time for owners to step up and increase their investment in domestic training and to start reducing their reliance upon foreign crews."

Nautilus wants the government to follow through on SMarT Plus by setting clear targets for recruitment, improving the tonnage tax training link requirements and restricting the numbers of Certificates of Equivalent Competency (CECs) being issued to foreign nationals to work on UK ships.

In 2017, there were more than 9,200 non-UK nationals with valid CECs, at a time when several thousand UK seafarers had lost their jobs as a result of the downturn in the offshore oil sector. In response to Nautilus concerns that the ineffective controls over the bulk issue of CECs is creating a pool of cheap labour, the government has established a special working group to examine the issues.

Seafarers are presently the only group of UK workers who are excluded from the full protection of National Minimum Wage and equal pay legislation, and Nautilus is also pressing the government to end these legal loopholes to prevent unfair competition in UK waters.

The government should promote UK shipping in domestic trades and create a level playing field in social and employment conditions on vessels trading between the UK and the EU, says Mr Dickinson.

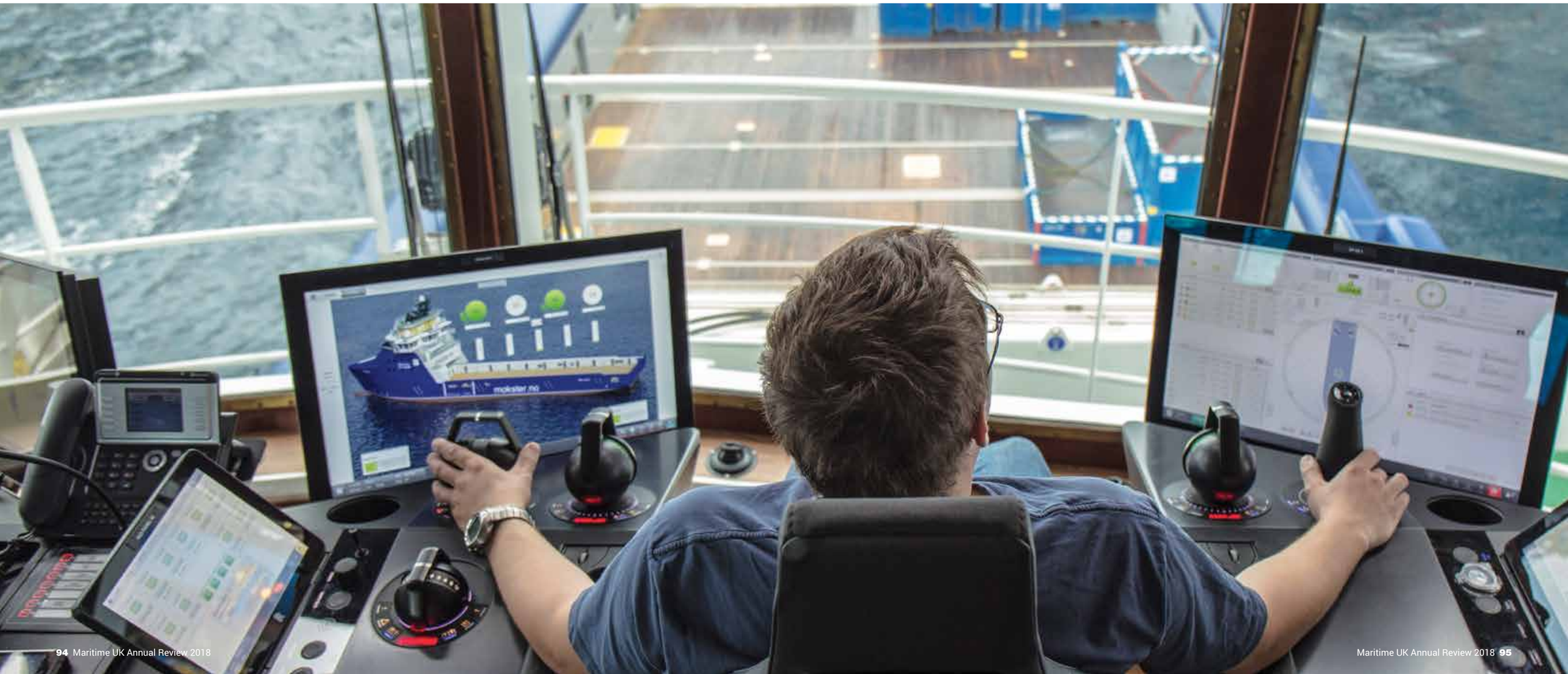
Nautilus says ministers could be doing more to maximise the employment of British seafarers in sectors such as coastal shipping, passenger and freight ferry services, offshore energy and decommissioning, and the growing offshore windfarm sector.

The union has made a substantial contribution to the government's Maritime 2050 consultation, stressing the need for the UK to ensure that its national maritime strategy is capable of competing with countries such as Singapore, Denmark, Norway and the Netherlands and sets clear targets for employment, training and fleet growth.

Nautilus is also urging the government to ensure that it uses Brexit as an opportunity to develop proactive policies for supporting the maritime sector once the UK is no longer subject to EU state aid guidelines.

Full details are contained in the ten-point Charter for Jobs, produced by Nautilus as part of its Jobs, Skills and the Future campaign.

Forecasts suggest that the number of UK deck and engineering officers is set to fall by more than one-third within the next decade..



Trinity House often uses helicopters for the safe and swift transportation of people and supplies to and from offshore lighthouses.

As a General Lighthouse Authority (GLA), Trinity House provides reliable, efficient and cost-effective aids to navigation.

Trinity House

Trinity House has been working hard in its various guises to safeguard shipping and support the mariner, both as a General Lighthouse Authority (GLA) and as a maritime charity.

Maritime safety

In its capacity as a GLA providing a wide mix of marine aids to navigation, Trinity House, among numerous other projects, continued its lighthouse modernisation programme, upgrading Europa Point Lighthouse (Gibraltar), Mumbles Lighthouse (South Wales) and Sark Lighthouse (Channel Islands). Each lighthouse received a number of improvements, perhaps the most notable being the installation at each station of LED lanterns as the main navigational light.

The new LED lights are emblematic of Trinity House's mission as a GLA to provide reliable, efficient and cost-effective aids to navigation; each station can now offer another 20 years of service. Future projects will seek to further hybridise digital technology with physical platforms, such as using Trinity House buoys to collect weather data for the Met Office or investigating 'virtual' aids to navigation to improve conspicuity at sea.

Global presence

May 2018 saw the fruition of four years of expertise, liaison and collaboration with the other member states of the International Association of Marine Aids to Navigation and Lighthouse Authorities (IALA) when the 19th IALA Conference convened in the Republic of Korea.

Working through a four-year cycle, Trinity House has chaired or otherwise sat on a number of committees at IALA covering aids to navigation requirements, engineering and sustainability, e-navigation, and legal and policy issues that affect aids to navigation and the safety of mariners around the globe.

IALA sets the 99.8% availability rate for major aids to navigation that Trinity House operates to, which ensures that mariners can take great confidence in our waters. Being a prominent presence on the IALA Council and in each of the working committees, Trinity House maintains a strong ambassadorial presence overseas and ensures rigorously high standards for maritime safety.

Maritime charity

The Trinity House Maritime Charity, one of the UK's largest endowed maritime charities, continues to provide education, support and welfare to the seafaring community and also to review and adapt to the changing requirements of the maritime welfare sector.

The Maritime Charity provides bursaries and trains Merchant Navy cadets, provides almshouses to retired mariners and awards major grants both on an ad hoc basis and as rolling multi-year programmes, including significant grants to major frontline maritime charities the Shipwrecked Mariners Society and the Sea Cadets, both on a rolling three-year grant. It has also part-funded the position of Maritime Studies Lecturer at London Nautical School in Lambeth, founded to improve seamanship and the quality of people joining the Merchant Navy.

Trinity House was one of the key drivers and sponsors of the Navigating Change report commissioned and published by the Maritime Charities Group (MCG), of which Trinity House is a member, in 2017. The report is a milestone review of the maritime welfare charity sector, following up an earlier review of the changing demands by looking at the need for change on the supply side of the equation. The report covers the ups and downs of a tumultuous decade (2005-15) and looks to future challenges over the next 35 years to 2050.

As an example of Trinity House's work to address changing welfare and training requirements, the fraternity of Younger Brethren that comprises the corporation's wider family has been brought in to make up regional grant-making committees. There are now six committees (Scotland & Northern Ireland, North, West and Wales, East, South West and South East), each of which have a certain degree of autonomy to receive, review and make grants on a regional case-by-case basis. Grants have been made so far for training vessels (repair and purchase), staff training, Sea Scouts and rowing and sail training clubs.

Another of the corporation's duties as a charity is as a deep sea pilotage authority, authorised by the Secretary of State of Transport to license deep sea pilots, whose expertise assists many ship's bridge teams unfamiliar with Northern European waters.

The charity, one of the UK's largest endowed maritime charities, continues to provide education, support and welfare to the seafaring community...





With UK ports contributing billions of pounds to the UK economy, Brexit could offer Europe's second-biggest ports industry a golden opportunity.

British Ports Association

Created in 1992, the British Ports Association represents the interests of its 100 port members, covering in excess of 350 ports and harbour facilities and terminals of all sizes across the UK, which in one form or another facilitate the majority of the UK's maritime trade.

UK ports policy is devolved, so the British Ports Association works with the UK and devolved governments, the EU and national and international bodies, representing the interests of the ports industry. As its membership comprises many ports, terminal operators and port facilities, all of varying size, location and nature, the association is able to draw upon a wide range of experience and knowledge to represent its members' interests.

The British ports industry

The ports industry plays a fundamentally important role in the country's economy. 95% of the UK's international trade – imports and exports – is carried through UK ports, which also handle 25 million international passenger journeys each year. In 2017, British ports handled nearly 500m tonnes of freight, making the UK the second biggest ports sector in Europe. Ports are investing large sums – at no cost to the Exchequer – to expand facilities to cope with increasing demand, particularly in the ro-ro, container and off-shore energy sectors. Investment of this nature is crucial if the UK economy is to remain competitive internationally. There is currently £1.7bn of privately financed port infrastructure in the pipeline.

UK ports directly employ over 101,000 people, with industry productivity 46% higher than the national average. Ports contribute £7.6bn to the UK's GVA and pay £1.5bn in taxes every year.

BPA activity

Over the last year the BPA has been busy lobbying for a Brexit that puts trade facilitation – "frictionless trade" – at the heart of the government's negotiating strategy. It have also prior-itised port connectivity and called for a new freight strategy, and crucially, a review of post-Brexit opportunities for improving the planning and consenting regimes to boost trade and economic growth.

Sustainable development resolution

A workable and pragmatic sustainable development is vital to the continuing competitiveness of the UK ports industry and the BPA laid out its commitment to a healthy environment and a thriving economy in a new sustainable development resolution, published in August 2018.

Parliamentary engagement

The BPA hosted a reception in the UK Parliament and a joint reception with the UK Chamber of Shipping in the Scottish Parliament, which has provided members with the opportunity to engage directly with elected officials as well as hearing from ministers on their views for the year ahead.

It continue to respond to enquiries in Westminster, Holyrood and Cardiff and has given oral evidence to several on a range of topics including Brexit, the Crown Estate (Scotland), Welsh Ports and Fishing.

Scottish ports brochure and energy directory

The Scottish Ports Group, facilitated by the BPA and the only forum for the ports industry in Scotland, published a new brochure highlighting the strength and breadth of the sector in Scotland. Working with Scottish Enterprise and Highlands & Islands Enterprise, the group has also published a new online directory for energy ports, helping point customers to ports that will meet their requirements.

Security and resilience group

The BPA established a new working group with the UKMPG this year for Port Security Officers to meet and share good practice on the ever-increasing challenges and regulatory requirements around security – both physical and cyber. This group has established a good working relationship with officials in the DfT and beyond and meets twice a year, in line with the practice of other policy groups.

95% of the UK's international trade – imports and exports – is carried through UK ports, which also handle 25 million international passenger journeys each year

DP World London Gateway, developed on a brownfield site on the River Thames.

UKMPG members already handle huge volumes of non-EU trade efficiently and effectively.

UK Major Ports Group

Handling three-quarters of the UK's seaborne trade – more than 70% of the UK's total trade in goods – UK Major Ports Group (UKMPG) members continue to be absolutely fundamental to the UK's economic success and all of our daily lives.

2017-18 was another year of impressive development for members, with more investment and new services – delivering more value for customers and adding prosperity and jobs to coastal communities. It has also been an exciting period of transformation at UKMPG, with a new leadership team and an ambitious agenda to support members' continued success.

The UK's future has some elements of uncertainty. But the contribution of its major ports today, and their willingness to develop and grow their contribution tomorrow, is not one of them. UKMPG looks to the future with confidence.

95% of the UK's physical trade with the world arrives or departs by sea. 75% of this trade, worth £585bn in 2017, is handled by members of the UKMPG. This includes the export of seven out of every ten cars made in the UK, and the import of nearly half of the UK's food and feed needs.

As the UK's predominant gateways to the world, major ports are vital enablers of strategic supply chains for the UK – allowing industries to export, and bringing in the food and goods that we all depend on in our daily lives. They achieve this by investing more than half a billion pounds a year.

In the past year, all members saw strong growth in key categories of their business, with record volumes handled and milestones reached in terms of sizes of vessels served.

New routes were added, both shortsea and deepsea to Asia, Africa, the Americas and New Zealand, further enhancing the UK's worldwide connections.

Significant investments were made in facilities to provide bespoke customer solutions in categories such as automotive, steel, renewable energy and food/feed. Major expansion plans were progressed at a number of ports in the drive for increased volumes and efficiency. There were also major developments on port estates – everything from distribution centres to film studios.

Major ports also continued their progress towards sustainability. Air quality measures were implemented, and electric and hybrid equipment was tested and introduced.

UKMPG has a new chair and two vice-chairs – one of which is a new role focusing on safety and people, confirming these as top priorities for UKMPG members.

Led by its new CEO, Tim Morris, UKMPG is pursuing a revitalised policy programme, focused on the themes of connectivity, innovation and sustainability, and plans to bring forward substantive, practical solutions such as on air quality and a ten-point plan for boosting port and hinterland investment.

Brexit cannot be avoided but it is not feared by UKMPG members. They already handle huge volumes of non-EU trade efficiently and effectively. There is no complacency about the technical challenges of major change, but there will also be opportunities from Brexit that should be grasped, such as setting the appropriate regulatory framework for the UK's unique port sector – high standards, but the right ones.

UKMPG members are confident that through working in partnership with customers, supply chain partners and government, they can contribute even more to the UK.

MOL Triumph ***arrives at Associated British Ports' Port of Southampton.***





The Institute of Chartered Shipbrokers has spread far and wide since its origins in London at The Baltic Exchange in 1911.

Institute of Chartered Shipbrokers

The Institute of Chartered Shipbrokers is the professional body for all members of the commercial shipping industry worldwide. It has expanded far and wide since its origins in London as the historic home of maritime businesses and now has 25 branches and 14 teaching centres in key shipping hubs around the globe, supporting professionalism through a trusted system of qualifications and membership.

Within the globally mobile maritime industry, MICS distinguishes members as true professionals, helping them to gain jobs, enhance their careers and unlock commercial opportunities.

Trust is a valuable commodity in the relationship-based world of commercial shipping, where the demands of complex transactions, coupled with the values at risk, require reliable counterparties.

ICS members in ports and shipping centres around the world are highly sought after as people who both know what they are doing (proven knowledge via a rigorous system of examinations and certification) and who can be relied upon to practise business with integrity (the principles of membership).

The ICS was founded on the floor of the Baltic Exchange in 1911 precisely for this purpose and was awarded its Royal Charter in 1920. It still shares its motto with the Baltic – 'Our Word Our Bond'.

"The ICS and Maritime UK are co-ordinating their work where separate sectors have overlying concerns, such as Brexit, funding for skills and education, government briefing and London International Shipping Week (LISW)," says Julie Lithgow, director of the ICS. For the coming year, the ICS is looking to develop apprenticeships in the port agency sector to further promote and support the maritime services field in the UK.

The ICS is also considering the impact of Brexit on the UK's maritime services sector. Ms Lithgow stresses that open trade borders must be a priority in a post-Brexit world.

Meanwhile, she raises concerns of a lack of investment in education and training within maritime companies as an important problem that the sector must contend with today.

ICS members are highly sought after around the world, for their proven knowledge and professional approach

Associated British Ports Port of Hull.

Maritime London works closely with UK government departments, through Maritime UK and independently.

Maritime London is working hard to ensure that London and the UK remain the primary maritime services hub.

Maritime London

Maritime London, the trade association for companies providing professional services to the international shipping industry, grew in terms of membership and activity in 2017-18.

New members including James Fisher, Millers, North P&I Club and Inmarsat were brought into the fold, as well as smaller firms such as Concirrus, which specialises in provide big data solutions to the marine insurance markets. Maritime London's incorporation of the IMIF also added 23 members, bringing total membership to more than 120.

By the end of 2018, Maritime London will have held more than 20 member events on subjects ranging from the effect of automation on maritime insurance, to the emergence of Africa as a generator of international trade. Whatever the subject, Maritime London is focused on looking at areas central to the evolution of the sector and providing speakers at the top of their respective fields.

Meanwhile, Maritime London continues to be proactive in promoting its members and the sector overseas. It had a strong presence at Posidonia and held an excellent seminar at the British Embassy focusing on Brexit and maritime services.

London, and the wider UK, is the leading international maritime professional services centre, says Jos Standerwick, chief executive of Maritime London. The association is working increasingly closely with UK government departments, through Maritime UK and independently, to promote and ensure that position. Working together, Maritime London and Maritime UK have created forums, such as the Ministerial Working Group, to allow the sector to engage at the highest level with relevant government departments. Through Maritime UK, Maritime London has been working with the DIT on providing a five-year strategy for maritime promotion.

In the past year, Maritime London has also been focusing on the supporting sectors that play a fundamental role in the UK's holistic offering, and highlighting the importance and extent of the whole sector. It has also been working to strengthen its ties with key maritime hubs such as those in China and Greece.

Greater diversity and access to talent is vital if London and the UK are to remain a leading cluster, says Mr Standerwick. Maritime London is therefore pleased to sit on the Maritime UK's Women in Shipping Taskforce.

In other initiatives, Maritime London, with other Maritime UK members, met with the Exchequer Secretary to discuss how the UK's business environment can be made more competitive in order to attract owners and cargo interests to the UK cluster.

Maritime London members are providing industry input into the Maritime Service Forum – instigated by the DfT, this is the first cross-departmental group created to discuss the needs of maritime professional services exclusively.

As a result of the first meeting, the DfT, in partnership with Maritime London, is commissioning a comparative study into the competitiveness of the UK as a jurisdiction to conduct shipping business. This study will complement the Maritime 2050 strategy.

Further to this, Maritime London is in discussions with BEIS and the DIT on what can be done to ensure London and the UK remain central to maritime professional services post-Brexit.

Maritime London will be coordinating an innovation in MPBS (Maritime Professional Business Services) working group focusing on crypto, blockchain, big data and automation. The working group is exploring the potential impact of these innovations and considering what the sector needs in order to adapt to and succeed in this fast-changing technological landscape.

Importantly, Maritime London is also doing what it can to fulfil its CSR obligations, says Mr Standerwick. This has included hosting the first Maritime London Officer Cadetship Programme (MLOCS) dinner at Trinity House, in conjunction with Seafarers UK.

"While Maritime London is in rude health and working harder than ever to support its members to ensure that London and the UK remain the primary maritime services hub, we could not do this without our proactive membership and engagement from supporting organisations," he says.





The historic Baltic Exchange, a global centre for maritime trade and clearing house for shipping contracts.

The Baltic Exchange

The Baltic Exchange is a key part of the UK's commercial maritime infrastructure and ensures the smooth running of the global bulk shipping markets. The Baltic Exchange and its 650 company members in London and other key international shipping hubs are at the centre of international trade. Thanks to the Baltic Exchange's independent freight market assessments, there is a thriving derivatives market which allows companies to manage their bulk shipping risks. The independent benchmarks are also used to settle physical contracts as well as benchmark company performance.

Trusted around the world, the London-based, 274-year-old institution is the home of shipbrokers, shipowners and operators, freight traders, charterers and numerous other companies involved in the business of moving bulk commodities such as grains, ores, coal and oil by sea. All its members are expected to abide by a code of conduct, whose ethos is bound up in the Exchange's moto "Our Word Our Bond".

The past two years have seen significant changes at the Baltic Exchange. It has a new owner in the form of the Singapore Exchange (SGX); new freight indices and assessments for the LNG, container and grain markets are being published; and important new services, including an escrow facility for ship transactions, have been launched. SGX's acquisition of the Baltic Exchange is an investment in London and recognises the city as a leading commercial centre for shipping.

SGX's regulatory experience adds a huge amount of value to the quality of the Baltic Exchange's freight indices and assessments. At the same time SGX's position as an important commodity exchange, particularly for iron ore, as well as a clearing house for freight, mean that the synergies between the two organisations are clear.

The Baltic Exchange is currently focusing on ensuring that its products, which are used globally to settle millions of dollars-worth of physical and derivative shipping contracts, are more transparent and robust than ever. At the same time, SGX is projecting the Baltic Exchange brand into Asia.

Trusted around the world, the London based Baltic Exchange is a 274-year-old institution

The Baltic Exchange is the world's only independent source of maritime market information for the trading and settlement of physical and derivative shipping.

The UK National Shipbuilding Strategy has been a key document for the maritime industry.

Society of Maritime Industries

The UK National Shipbuilding Strategy, published in 2017, has been a key document for the industry, says John Murray, CEO of the Society of Maritime Industries (SMI).

"As the government's response to Sir John Parker's 2016 independent report, it looked at how we can build on the benefits that we have seen from the aircraft carrier programme. That programme provided a major fillip to the industry in terms of driving up standards and production, and in investment in the infrastructure of the industry to support the aircraft carrier construction work," he says.

The shipbuilding strategy set out the plans for naval shipbuilding for the next 30 years but the creation of an industry-led Maritime Enterprise Working Group has taken the focus well beyond the 'grey' ships, looking at broader opportunities, says Mr Murray.

The group will take forward many of the strategy's recommendations on topics such as productivity improvements and skills development, vital to a wider ship-building strategy.

"We are not talking about getting back into building container ships or tankers – it is about the specialist, highly complex ships, systems and equipment that the UK can deliver," says Mr Murray. "This is where our advanced tech sector comes to the fore."

Autonomy has become mainstream in terms of industry discussions, he points out – including considerations of the regulatory framework required for autonomous vessels. "The UK has led the world in this area, being first to try to codify how we should design, build and operate, and train people, around autonomous vessels."

SMI was pleased to be involved in discussions on this topic during London International Shipping Week 2017, he adds.

Another major event for SMI was its own annual conference, opened and addressed by the Princess Royal, 'a phenomenal supporter of the industry' who also spent the afternoon meeting delegates and listening to presentations.

SMI has been lobbying the government on the need to create a maritime research and innovation centre for the UK, which would link many excellent facilities around the country on a 'hub and spoke' model. This, says Mr Murray, will bring together much expertise and offer a holistic solution to understanding and tackling the major technological challenges that will emerge over the next few years. "The industry is putting a lot of funding into this and we are expecting government investment.

"SMI is also campaigning for the strategic need to map the whole of the seabed of the UK Continental Shelf – in other words, 'explore our undiscovered land under the sea'! Currently only about 30% of this area has been mapped and in the public domain," says Mr Murray.

"Other countries have found that by mapping the seabed, they have been able to unlock commercial opportunities – from understanding what is there and being able to unlock GDP value five or six times the cost of the task."

The government recently published the Foresight 'Future of the Sea' report, which provides recommendations on how the UK's science and technological capabilities can ensure that the UK benefits from the ocean economy over the next two decades. "This has taken on a new urgency in the light of Brexit."

Since the launch of the Maritime Growth Study, there has been a step change in activity at government level, he reports. For example, a Westminster Hall debate on shipbuilding strategy in January 2018 was well attended, with backbench MPs showing clear vision and a good level of knowledge on the topic. "They understood the issues."

The launch of the *RRS Sir David Attenborough* and the intense focus on plastics in the ocean through the naturalist's Blue Planet programme have both helped to highlight the importance of the sector and the sea, says Mr Murray.

"Underlying all of this, we aspire to get more people to choose the maritime sector for their future career. Anything that raises the profile of our sector and demonstrates the good we can create for our social and economic wellbeing must surely eventually cascade down into the conscience of the general population."

Rolls Royce, which is working on autonomous technology, envisages a remotely operated local vessel being in operation by 2020 and a remotely operated autonomous vessel in international waters by 2025.



The UK's thriving marine sector, with its high-tech expertise and world-renowned craftsmanship, is attracting serious attention from government and others.

British Marine

From technical support and expert advice to training, lobbying and high-profile events – British Marine boasted a packed agenda in 2017-18.

As the leading trade association for the UK's marine industry, British Marine represents over 1,500 members drawn from the leisure marine, superyacht, small commercial marine and passenger boat sectors, with most member companies being small and medium -sized businesses.

According to the association's latest statistics, total revenue from the UK's leisure, superyacht and small commercial marine industry rose by 3.4% to reach £3.12 billion in 2017. This was the sixth consecutive rise in industry revenue, now at its highest level since the financial crisis of 2008. Full-time equivalent employment in the UK marine industry is over 33,000, says the report and the sector delivers an estimated GVA (gross value added) output of £39,000 per worker. Exports remain an important contributor to the success of Britain's marine businesses, accounting for 30.7% of the sector's total revenue and growing by 4.7% in 2017 to generate £924 million.

"As representatives of the industry, we will continue to work hand-in-hand with members and the government to ensure our sector is represented throughout the Brexit negotiations." commented Lesley Robinson, Chief Executive Officer of British Marine. She added: "We are working closely with our leading export members and the government to develop a strategic five-year export plan which fully supports trade promotion for the entire marine industry, something we believe will position us well in the post-Brexit era."

British Marine has been collaborating with its members and government at every level to address a number of key matters for the future success of the sector. These include ensuring that UK vessels maintain Union Goods status and securing VAT-paid status on second-hand boats; safeguarding the industry's access to skilled labour post-Brexit; preventing non-tariff barriers from being introduced between the UK and the EU which would significantly hamper the industry's trade outlook; maintaining, for now, alignment with the European regulatory system (for example, the Recreational Craft Directive); and scoping out markets for future trade deals.

One of British Marine's most important services is its technical support. "Over the last year, our expert technical team have continued to be fully engaged in the creation and amendment of a wide range of UK, EU and international legislation, as well as advising members on compliance," said Ms Robinson. This covers the full footprint of the industry, from the build of motor and sailing yachts, superyachts, canal boats and small commercial vessels such as offshore wind support craft, to equipment manufacturers and distributors in every aspect of the supply chain.

As well as providing expert advice as the Recreational Craft Directive was transposed into UK law, the organisation supported members in lobbying for and developing the Maritime and Coastguard Agency's Code for high-speed offshore service craft of 500gt carrying up to 60 people and supported the completion of an Inland Boatbuilding Code of Practice. The latter provides clear guidance on the design, build and operation of craft designed specifically for use on the UK's inland waterways network.

British Marine focuses strongly on ensuring its members and the industry have access to the skills and skilled labour that enable the industry to continue its growth. As well as providing a wide range of training courses and qualifications, the association is working with the government and Maritime UK to help tackle skills shortages. It is supporting a number of employer-led working groups to develop new Trailblazer apprenticeships.

Ms Robinson remarked: "In 2017, we supported the successful delivery of new apprenticeship standards, with the appropriate funding package in boatbuilding, marine engineering and marina and boatyard operative and work is under way on marine electrician and boat master standards." She added: "British Marine also works to promote careers right through the industry. We engage with schools and educational establishments from across the UK and help deliver and support a range of careers events aimed at encouraging children, teenagers and adults to consider a role in the marine industry."

The other fundamental role British Marine fulfils is as a Trade Challenge Partner, which sees the organisation collaborate with the Department for International Trade across a variety of initiatives. In 2017, it supported many UK marine businesses in attending and taking prominent positions at a number of overseas trade shows and exhibitions. This included the Monaco Yacht Show, Fort Lauderdale and Miami International Boat Shows.

To ensure the industry meets the needs of a changing consumer market, British Marine has developed a new 'Futures' strategy to help suppliers and manufacturers attract and retain current and future customers. Over the last year it has launched a cutting-edge piece of research into consumer behaviour, identifying the changing social context, emergence of digital and online activity and how to appeal to Millennials and Gen Z. It is now working with strategic partners and its members to ensure they take steps to future proof their businesses.

British Marine owns and operates the Southampton Boat Show, held in September annually. The 2018 Show attracted around 100,000 visitors and featured British Marine's eighth successful Apprentice Graduation Ceremony and fifth edition of the British Marine Awards, which recognises excellence amongst its membership.

Internationally ranked within the world's top ten boat shows, this iconic event celebrated its 50th anniversary in 2018. As noted by Ms Robinson: "This year's event was very much about looking ahead to the next 50 years whilst we acknowledged our heritage. We are proud to be Britain's biggest boating festival, as well as being internationally renowned, and we are looking at how we can develop the event further to meet the level of interest we are receiving."

The world's largest sailing catamaran,* Hemisphere, *from Pendennis, an award winning custom build and refit superyacht yard based in Falmouth, UK.

Membership and sponsorship

There are a number of ways to get involved and support Maritime UK's work through membership and sponsorship.

Membership
Maritime UK offers a number of different membership categories:

- National
- Strategic
- Regional
- Associate

Please contact the secretariat if you wish to discuss joining Maritime UK.

National membership
National members must be able to demonstrate that they are a nationally representative organisation with a robust governance structure internally to show that they are able to identify and represent the needs of their own sector.

Strategic membership
Strategic partner members are not required to demonstrate a comprehensive reflection of their sector, but should to be specialists in their area of expertise, and likely to be the thought leaders for their area.

Regional membership
Regional and devolved nation cluster members required to be a regionally representative organisation with a robust governance and auditable structure internally to aid in application for public finance and grants.

Associate membership
New membership category for 2019. Details will be available on the Maritime UK website.

Sponsorship
Maritime UK's cross-industry programmes rely on sponsorship for delivery. If you are interested in supporting existing initiatives or have ideas for new programmes, please get in touch with the team.

Recent programme sponsorships include Maritime UK's Maritime Futures programme by BMT and the Maritime Masters programme by ABP.

The* Craigleith, *a new tug delivered this year for work on the River Forth.

Membership Directory

Maritime UK brings together the UK's shipping, ports, services, engineering and leisure marine industries to promote the sector, influence government and drive growth.

British Marine **116**
British Ports Association **116**
CLIA UK & Ireland **116**
Institute of Chartered Shipbrokers **117**
London International Shipping Week **117**
Maritime London **117**
Mersey Maritime **118**
Nautilus International **118**
Seafarers UK **118**
Solent LEP **119**
The Baltic Exchange **119**
Trinity House **119**
UK Chamber of Shipping **120**
UK Major Ports Group **120**
Maritime Skills Alliance **120**

Trinity House has been providing lighthouses around England, Wales and the Channel Islands for the safety of the mariner for over 400 years.

British Marine
British Marine is the leading trade association for the UK's leisure, superyacht and small commercial marine industry. Its 1,500+ members come from a broad range of businesses including boatbuilders, chandlers, brokers, marinas, passenger boats and engines.

The core aim of the business is to deliver excellence. Both in the quality of its membership services, its representation of the interests of members and the boating community alike and most importantly, in the quality of its members.

British Marine creates, develops and maintains high quality expert services, benefits and commercial activities to promote its sector and works with its members to achieve profitable growth in home and overseas markets.

On behalf of our members, British Marine continues to:
- Promote the marine industry.
- Provide sector showcases in the UK and overseas
- Liaise and lobby governments, authorities and agencies
- Conduct research on UK and international marine markets
- Provide technical, regulatory and manufacturing information and advice
- Provide strategy, advice and practical assistance on environmental issues
- Assist with training and recruitment
- Advise and represent on legal and financial matters

www.britishmarine.co.uk

British Ports Association
Created in 1992, the British Ports Association represents the interests of its 100 full members, and numerous associate members, to the UK and devolved governments, the EU and national and international bodies.

As our membership comprises many ports, terminal operators and port facilities, all of varying size, location and nature, the Association is able to draw upon a wide range of experience and knowledge to represent its members' interests.

The BPA's aims are to:
- Dedicate resources to representing a wide variety of UK port interests to government in the UK, Europe and internationally;
- Provide a resource for its members on legislative and policy issues, as well as a forum for the exchange of knowledge and development of best practice;
- Work towards achieving an equitable and transparent ports industry and a level playing field throughout Europe;
- Promote the use of ports and shipping as an environmentally sustainable mode of transport.

www.britishports.org.uk

CLIA UK & Ireland
CLIA UK & Ireland bring together cruise lines, travel agents, associated travel partners & are dedicated to the expansion of ocean and river cruise holidays.

CLIA UK & Ireland is a member of Cruise Lines International Association (CLIA), the world's largest cruise industry trade association with representation in North and South America, Europe, Asia and Australasia.

CLIA is engaged in travel agent training, research and marketing communications to promote the value and desirability of cruise holidays with thousands of travel agency and travel agent members.

CLIA's Associate Member and Executive Partner programmes include the industry's leading providers of supplies and services that help cruise lines provide a safe, environmentally-friendly and enjoyable holiday experience for millions of passengers every year.

www.cruiseexperts.org

Institute of Chartered Shipbrokers
The Institute of Chartered Shipbrokers is the professional body for all members of the commercial shipping industry worldwide.

The Institute was founded in 1911 and awarded a Royal Charter in 1920.

The Institute of Chartered Shipbrokers sets and examines the syllabus for membership, providing the shipping industry with highly qualified professionals.

The Institute of Chartered Shipbrokers is the only internationally recognised professional body in the commercial maritime arena and it represents shipbrokers, ship managers and agents throughout the world.

We have 24 branches in key locations and 4,000 individual Members and Fellows.

Members of the Institute are committed to maintaining the highest professional standards across the shipping industry and, as part of a professional body, members enjoy the benefits of an enhanced career in the shipping industry.

www.ics.org.uk

London International Shipping Week
LISW is a 'must attend' event, offering over 160 industry functions and unique networking opportunities for leaders across all sectors of the international shipping industry – regulators, charterers, ship owners, ship managers, bunker suppliers, lawyers, ship brokers, bankers, insurers, insurance brokers, commodity traders and brokers, ship suppliers, port operators, shipping service providers and many more.

londoninternationalshippingweek.com

Maritime London
Maritime London is a not for profit promotional body for UK-based companies that provide professional services to the international shipping industry.

Maritime London's mission is to promote the UK as the world's premier maritime business centre.

Maritime London objectives in support of the mission are:
- To represent collectively and raise the profile of maritime professional business services
- To facilitate new business for members through trade promotion
- To attract shipowners, operators and cargo interests to the UK
- To build upon historic and present-day advantages of the UK as the pre-eminent base for international maritime professional business services
- To assure a professional maritime skills base through the encouragement, recruitment and retention of British seafarers
- To promote British maritime training and education
- To encourage networking between its members in order to build closer contacts
- To organise industry events aimed at bringing members up-to-date on recent developments in the maritime industry

Membership of Maritime London is open to any company that is able to demonstrate support for the UK's maritime services sector on a global basis.

The Board of Directors is elected by and drawn from the diverse membership giving Maritime London its direction. This is augmented by two member only meetings each year where suggestions and ideas for the future are received.

www.maritimelondon.com

Mersey Maritime

Mersey Maritime was set up in 2003 to represent the interests of the Ports and Maritime Sector on Merseyside, helping create the right conditions for business growth.

We operate as a not-for-profit organisation at the public-private sector interface, working with hundreds of businesses whose activities span the 33 sub-sectors that make up the industry in the Liverpool City Region. In 2015, the region's Marine and Maritime Sector comprised some 1250 businesses making a combined contribution of £3.47bn, or 13% of, the regional GDP.

These statistics – and the some of the massive infrastructure developments currently nearing completion across Merseyside – projects such as Liverpool2, Peel's new £400m deep water container terminal at the Port of LIverpool – ensure that the Maritime Sector is recognised as a key economic driver for the region.

Mersey Maritime works across four main areas of activites

- Sector Growth
- Communications
- Infrastructure
- Knowledge and Skills

Our strength lies in having a broad and independent overview of the Maritime Sector in the Liverpool City Region; what's happening, who the key players are, what the common issues might be, what the trends are and how these various strands fit together. In order to deliver real value to local businesses we build strong relationships with a wide range of policy makers, MPs, local authorities and other strategic partners, allowing us to act as an effective interface between the two.

www.merseymaritime.co.uk

Nautilus International

Nautilus International is a trade union and professional organisation representing more than 22,000 maritime professionals in the UK, Netherlands and Switzerland.

Nautilus members work at sea and ashore.

Sometimes we are referred to as the 'Merchant Navy union', but this doesn't tell the whole story.

Members include shipmasters, officers, cadets, ratings, yacht crew, VTS officers, harbourmasters, river boatmen, nautical college lecturers, maritime lawyers and even ship-based medical personnel.

www.nautilusint.org

Seafarers UK

Seafarers UK is a charity that helps people in the maritime community, by providing vital funding to support seafarers in need and their families.

We do this by giving money to organisations and projects that make a real difference to people's lives across the Merchant Navy, Fishing Fleets, Royal Navy and Royal Marines. Last year we gave grants totaling £3.5 million to over 70 maritime welfare charities.

Because Seafarers UK works closely with all of the organisations that support seafarers and their dependants, we can target donations where they will make the biggest difference. Seafarers UK receives no government funding and relies on donations and fundraising to be able to carry on providing long-term aid. Without this, there simply wouldn't be the level of support we are able to provide today and that last year gave hope and help to over 170,000 seafarers and their families when they needed it most.

www.seafarers.uk

Solent LEP

The Solent LEP is the key interface and lead for economic development in the Solent. It is a partnership organisation between the business community, the Further Education and Higher Education sector, three unitary authorities, eight district councils and one county council, all of whom are actively working together to secure a more prosperous and sustainable future for the Solent area.

Our vision is to create an environment that will bring about sustainable economic growth and private sector investment in the Solent. It will assist this globally competitive area reach its full potential, enabling existing businesses to grow, become more profitable and to be greener; enabling the creation of new businesses and attracting new businesses to the region.

www.olentlep.org.uk

Society of Maritime Industries

The Society of Maritime Industries (SMI) is the voice of the UK's maritime engineering and business sector promoting and supporting companies which design, build, refit and modernise ships, and upply equipment and services for all types of commercial and naval ships, ports and terminals infrastructure, offshore oil and gas, maritime security and safety, marine science and technology, maritime autonomous systems and marine renewable energy.

SMI provides a wide range of activities both internationally and in the UK for the benefit of the maritime engineering business community. The members' interests are represented by our six councils which focus on the markets in offshore energy, marine science and technology, commercial maritime operations, ship building, repair and equipment, naval platforms, systems and equipment, maritime autonomy, maritime security and safety, and ports and terminals infrastructure.

Our activities follow our objectives of presenting members with business opportunities, assisting with research and innovation, lobbying government and NGOs to improve the business environment, facilitating network opportunities and providing marketing and other services.

www.maritimeindustries.org

The Baltic Exchange

The Baltic Exchange is the world's only independent source of maritime market information for the trading and settlement of physical and derivative shipping contracts.

Our international community of over 600 member firms encompasses the majority of world shipping interests and commits to a code of business conduct encapsulated in the motto "our word our bond".

Baltic Exchange members are responsible for a large proportion of all dry cargo and tanker fixtures as well as the sale and purchase of merchant vessels.

Headquartered in London, with regional offices in Singapore, Shanghai and Athens, the Baltic is owned by its shareholders, most of whom are members. It is governed by a board of directors elected by shareholders and members.

www.balticexchange.com

Trinity House
Trinity House is a charity dedicated to safeguarding shipping and seafarers, providing education, support and welfare to the seafaring community with a statutory duty as a General Lighthouse Authority to deliver a reliable, efficient and cost-effective aids to navigation service for the benefit and safety of all mariners.

The Corporation of Trinity House was incorporated by Royal Charter in 1514 to regulate pilotage on the River Thames and provide for aged mariners.

With a mandate that has expanded considerably since then, we are today the UK's largest-endowed maritime charity, the General Lighthouse Authority (GLA) for England, Wales, the Channel Islands and Gibraltar and a fraternity of men and women selected from across the nation's maritime sector.

Our mission
Our mission as a General Lighthouse Authority is to deliver a reliable, efficient and cost-effective aids to navigation service for the benefit and safety of all mariners.

Our vision
Our vision is to be a trusted world class organisation and regarded as such by our stakeholders.

We work hard to ensure that we are valued as much for our work today as for our reputation earned through over five centuries of service.

Marine operations
At the business end of Trinity House we operate a fleet of vessels, working in our waters at the highest levels of seamanship.

We have been operating in the waters around England, Wales and the Channel Islands since 1741, using purpose-built tonnage equipped to the highest technical standard and manned by professionally qualified officers and crew.

Coordinated and monitored around the clock by our Planning Centre, typical vessel activities include wreck location and marking, aid to navigation maintenance, towing, buoy handling and surveying.

Working at sea is unpredictable and inherently hazardous; to preserve the safety of the mariner we take measures to make sure we can respond effectively should an incident occur, working closely with our partners at the Department for Transport and the MCA. We have a vessel ready to respond within six hours of the Strait of Dover, carrying our instantly recognisable Emergency Wreck Marking Buoys.

www.trinityhouse.co.uk

UK Chamber of Shipping
The UK Chamber of Shipping is the trade association and voice of the UK shipping industry. We work with government, parliament, international organisations and others to champion and protect the industry on behalf of our members.

It is our mission to deliver for our members trusted specialist expertise, lobbying and influence at a UK level on maritime issues across national, European and international government and governmental bodies. By combining the strength of our members with this expertise we will advance the competitive strength of the industry ensuring that the UK remains as a leader in the global maritime business.

Membership of the UK Chamber gives access to unrivalled policy expertise, an extensive network of industry influencers and a voice in government and beyond that can simply not be achieved by companies acting alone. It is also the home of the Merchant Navy Training Board (MNTB) that is the shipping industry's central body for promoting and developing seafarer education, training and skills across specific industry sectors.

We have a dedicated staff with an unparalleled breadth of specialist knowledge and access to governments at the highest level. We support our members on legislation and regulation that affects their business. As the industry association for UK shipping we create change, influencing government at Westminster, Whitehall, Holyrood, Brussels and the International Maritime Organization.

With a growing membership of 170 member companies throughout the UK, made up of shipowners, professional organisations and service companies, we do not just seek to raise awareness of shipping; we work to create an understanding of it, ensuring that member companies' commercial objectives are at the heart of the government process.

www.ukchamberofshipping.com

UK Major Ports Group
The United Kingdom Major Ports Group Ltd (UKMPG) was formed in 1993 and is the trade association representing most of the larger commercial ports in the United Kingdom. It has nine members who, between them, own and operate over 40 ports, accounting for more than 70% of the total tonnage handled in UK ports. Current members are Associated British Ports, Belfast Harbour Commissioners, the Bristol Port Company, DP World London Gateway, Forth Ports, Hutchison Ports UK, PD Ports, Peel Ports and the Port of London Authority.

UKMPG represents the interests and concerns of its members to policy makers and opinion formers in the UK and Europe, on those areas of government or EU policy which affect the industry. It also provides forums for its members to share with other ports ideas and best practice on issues including the environment, port infrastructure and navigation.

UKMPG works very closely with the other ports sector trade association, the British Ports Association (BPA) and with the ports sector skills and safety organisation, Port Skills and Safety (PSS). The three organisations share offices, close to the offices of the UK Chamber of Shipping, allowing for a high degree of joint working on a range of issues.

www.ukmajorports.org.uk

Advertisers Index

Associated British Ports 4
Baltic Exchange 6
Brookes Bell 8
Compass Handbooks 52
Marlan Maritime Technologies 52
Port Training Services Inside Back Cover
Royal Haskoning Inside Front Cover
RNLI 6
Seafarers UK 8
TTMS UK Limited Outside Back Cover
UK Ports.org 6
UK Ship Register 2

Port Training Services

LEADING PROVIDER OF TRAINING TO UK PORTS



SPECIALISTS IN PORT RELATED NVQs & APPRENTICESHIPS, DELIVERING IMPROVED **SAFETY & COMPETENCE**

More info:
+44 (0)1670 357 030
info@porttrainingservices.co.uk
www.porttrainingservices.co.uk

PORT OF BLYTH


Here.
For tomorrow.
For over 50 years we've been putting our Members first. Responding as their needs changed. And as a result we lead the way in transport and logistics insurance, insuring many of the leading operators worldwide.
But the pace of change is accelerating. And, in a radically changing landscape, the future brings with it fresh challenges and new opportunities.
We think our leadership position confers on us a responsibility. To see, anticipate and solve the challenges our members face. Now and into the future. Because we're here not only for the present. We're Here. For tomorrow.
ttclub.com/tomorrow
TT CLUB IS MANAGED BY THOMAS MILLER
TT CLUB
50 years of established expertise