Department
for Transport

Maritime Growth Study: *keeping the UK competitive in a global market*

Call for Evidence

January 2015

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Chair’s Foreword

When I launched the Maritime Growth Study in November I was clear that it could only be a success if Government and industry worked together. It is essential that we gather the wealth of knowledge and experience available throughout the sector to take full advantage of this opportunity to secure the UK’s position as a world centre for maritime business and generate continued growth.

This study is an opportunity for the UK to look carefully at the measures we can take to help our sector grow and remain competitive in this global market. We cannot rely on our history to keep the UK at the top of an increasingly competitive field in the future, we need to put ourselves in the best condition possible to compete successfully with other maritime centres. I believe this study is vital to the health of the UK maritime sector and the effectiveness of the study will be determined by the strength of its evidence base.

This Call for Evidence is an important step that will underpin the conclusions of the final report. We are seeking views on a range of issues, encompassing the breadth of the maritime sector. Freight is a vital component with about 95% of our international trade in goods transported by sea, but the sector is not just about exports and imports. The UK is a world leading maritime centre, whose business services are relied on globally. As the goals of this study are not just limited to shipping and ports, neither must be the evidence we gather. They extend to the service sector, which provides high skilled, high income employment and the focus of the questions contained in this document reflect that scope.

The increasingly competitive nature of global business raises challenges to maintaining the UK’s status, but also presents enormous opportunity. We need to understand the scale of that opportunity and also where action can be taken to make the UK maritime sector even more competitive internationally and able to continue supporting growth in the wider UK economy.

This is the first stage in that process and I hope that we will see a large and enthusiastic response. I will be relying on your responses to help shape the work, as only by engaging widely and sharing knowledge as part of this evidence collection process can we achieve the goals of the study. It is vital that our conclusions reflect the real experiences of each and every part of the maritime industry.

We all need to work together to grow our maritime sector and to ensure that the UK is the first place that global companies turn to for their maritime business.

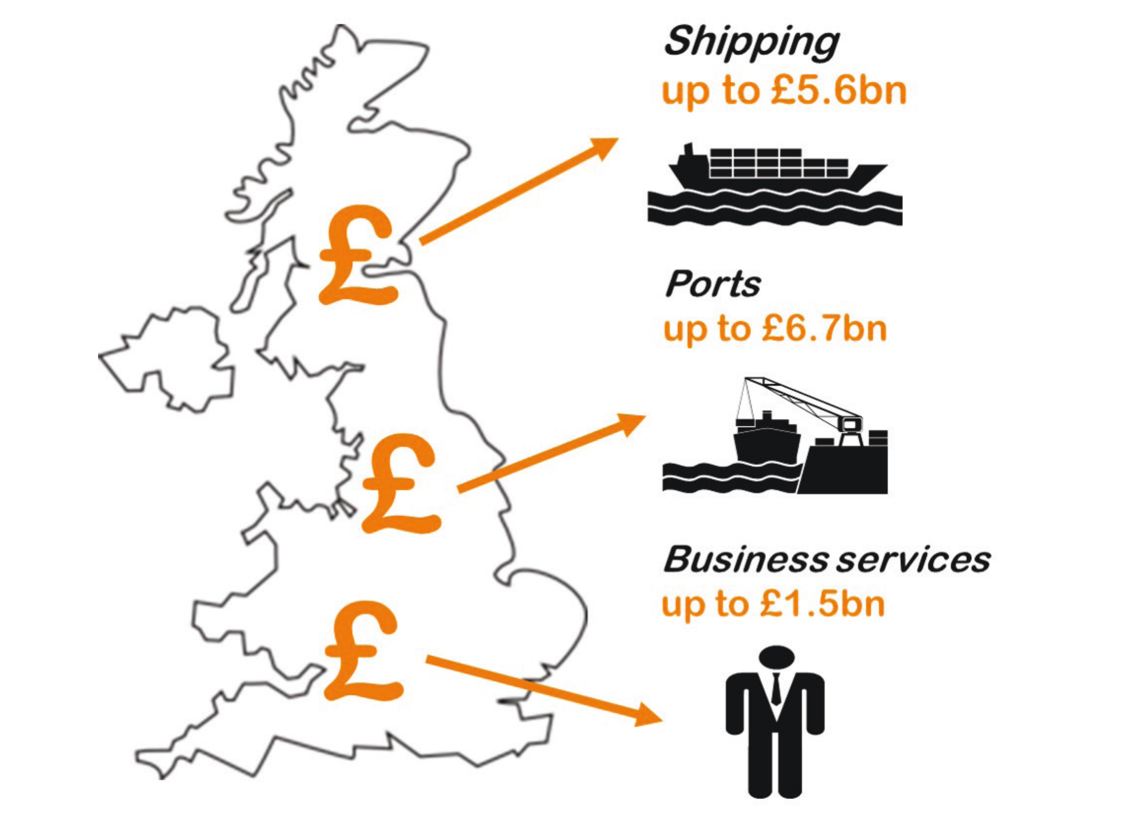
Alderman Jeffrey Evans
Chair, Maritime Growth Study

Executive Summary and questions

1. As an island trading nation, the United Kingdom maritime sector has played a key role in our history and continues to make a vital contribution to our economy.

2. The UK shipping, ports and maritime business services markets are estimated to directly contribute between around £8 and £14 billion a year to our economy and directly employ up to around 260,000 people (see Chapter 4 for more details). The sector also has a number of other important impacts. For example, by enabling the UK to trade the sector underpins almost every aspect of our economy.

Figure 1: UK maritime sector's direct contribution to the economy[1]



3. However, after the marked growth of the sector over a number of years, the sector now faces strong competition, particularly from the Far East, with some expressing concern that the UK shipping sector is increasingly

1 Oxford Economics (2013) 'The economic impact of the UK Maritime Services Sector', A report for Maritime UK http://www.ukchamberofshipping.com/media/filer_public/c9/ea/c9ea03a4-2344-43ee-bb60-dc5386e3c08c/economic_impact_of_uk_maritime_services_sector_-_feb_2013_including_regional.pdf

challenged. A recent decline in several indicators of UK shipping interests may be a possible early symptom of this.

4. Both Government and industry are keen to ensure that the UK position as a world-leading maritime centre is maintained and, where possible, to exploit opportunities for further growth. The Government has therefore launched the Maritime Growth Study: *keeping the UK competitive in a global market* to identify where and how improvements can be made to the sector's ability to compete internationally and grow further.

5. This Call for Evidence gives industry, wider business and individuals the opportunity to contribute to the evidence gathering process that will inform the study. This will help us to develop the strongest evidence base to support any conclusions and recommendations that emerge from the study.

6. We are interested in views on the full range of maritime activities undertaken in the UK, including, but not necessarily limited to:

- Ship financing, ownership and operation;
- The provision of maritime business services, including shipbroking, insurance, legal services, classification societies and financial services;
- Maritime education, skills, research and technology;
- Government administration of maritime activities, including ship registration;
- Government regulatory and policy activities affecting the maritime sector;
- Marine manufacturing and engineering.

7. Other elements of the sector may also be relevant, for example, the opportunities available to the ports industry to help contribute to the growth of the maritime industry.

8. We are particularly interested in understanding what will help the UK maritime sector to compete internationally and grow, specifically:

a. what attracts maritime businesses to locate in the UK; and

b. what impacts on the ability of maritime businesses located in the UK to compete in the global market.

9. In terms of maritime businesses, we welcome responses from those located in the UK, those using UK based maritime services, those who have done business in the UK in the past or those who are, or might be, considering doing business in the UK. We also welcome responses that cover several elements of the UK maritime sector or that focus on a single industry or specialisation within the sector.

10. The questions that we are looking for your views on are set out below. Although the questions are framed to elicit responses from businesses, we welcome responses from anyone with experience in or of this area. We also recognise that not all of these questions will be relevant to those answering, so respondents should focus on those sections that they feel able to respond to.

11. We also welcome the submission of any data, analyses or other evidence in support of respondents' answers to the questions.

12. At the end of the list of questions below, you are invited to provide evidence on any other relevant issues not covered by the preceding questions.

Questions

The attractiveness of the UK as a place for maritime businesses to locate

Question 1: What are the key factors that determine in which country you locate your activities?

Please detail the factors that are typically considered when deciding the country in which maritime businesses locate their activities e.g. location of key clients, availability of key services, skills, transport links or international mobility. With regard to shipowners, we are particularly interested in whether ship registration is a key factor, and if so, how it impacts decisions about which country activities are located.

Question 2: What do you think the key strengths and weaknesses of the UK are as a location for maritime businesses?

Please provide an assessment of the key strengths and weaknesses of the UK as a location for maritime businesses. For example, the linkages between industries within the UK maritime sector and with other sectors or the role played by Government administration of maritime activities, including activities such as ship registration.

Question 3: In your experience, how internationally competitive is the UK as a place for maritime businesses to locate compared to other countries?

Please provide an assessment of how internationally competitive the UK is as a place for maritime businesses to locate compared to other countries. In particular, which key countries are competing with the UK as a place for maritime businesses to locate and what are the key factors that are used to determine how internationally competitive the UK is as a place for maritime businesses to locate compared to these countries.

The ability of UK based maritime businesses to compete internationally

Question 4: What are the key factors that determine which country's maritime services you use?

Please outline and explain the factors that are typically taken into account in deciding which service providers (shipping, ports, insurers, trainers, shipbrokers etc.) to use (e.g. price, skills, reputation, geographical proximity, linkage with country of vessel registration etc).

Question 5: What are the key strengths and weaknesses of the UK maritime sector in supplying maritime services?

Please provide an assessment of the key strengths and weaknesses of the UK in supplying maritime services and that influence the sector's ability to compete internationally. For example, the linkages between industries within the UK maritime sector and with other sectors, the role played by Government administration of maritime activities.

Question 6: In your experience, how internationally competitive are UK based maritime businesses compared to those in other countries?

Please provide an assessment of how internationally competitive UK based maritime businesses are compared to those in other countries. In particular, where are the key international competitors of UK based maritime businesses located. Also what are the key factors that are used to determine how internationally competitive UK based maritime businesses are compared to those in other countries. Evidence on the recent performance of UK based maritime businesses and key international competitors, specifically which industries in the sector have done best and why, would be particularly welcome.

Opportunities and challenges

Question 7: What are the key opportunities for growing the UK maritime sector in the UK over the short, medium and long-term?

Please provide an assessment of the key opportunities for growth in the sector going forward.

Question 8: What are the key challenges to the growth of the UK maritime sector over the short, medium and long-term?

Please provide an assessment of the key challenges to the growth of the sector going forward.

Question 9: What are the key actions that Government and UK based industry could take to encourage more maritime businesses to locate in the UK?

Please identify specific actions that Government and industry could take either separately or together, in particular, non-fiscal initiatives that would have a significant effect. For example, what actions could Government and industry take to improve the promotion of the UK as a place that is open for maritime business and are there any lessons that the UK could learn from other countries and other maritime administrations.

Question 10: What are the key actions that Government and UK based industry could take to encourage more businesses to use UK based maritime services?

Please identify specific actions that Government and industry could take either separately or together, in particular, non-fiscal initiatives that would have a significant effect. For example, what actions could Government and industry take to improve the promotion of the UK as a place that is open for maritime business and are there any lessons that the UK could learn from other countries and other maritime administrations.

Measuring the performance of the UK maritime sector

Question 11: What metrics could the Government use to assess the UK maritime sector's performance now and in the future?

In particular, please provide views on the metrics that are discussed in Chapter 4 (e.g. Gross Value Added, Employment, Tax Revenues), and suggestions on any other metrics that the Government could use to assess the UK maritime sector's performance now and in the future.

Question 12: Do you have any views on the analytical approach we should use to measure the performance of the UK maritime sector?

In particular, please provide views on how we could estimate the UK maritime sector's direct contribution to the UK economy, the number of people that are directly employed by the UK maritime sector and the UK maritime sector's direct tax revenues; also how we can produce a time series of the UK maritime sector's direct contribution to the UK economy in constant prices; and estimate the UK maritime sector's indirect and induced impacts.

Question 13: Are you able to provide us with any additional evidence on the size of the UK maritime sector, and the size of its key competitors?

In particular, please provide any further evidence on the size of the UK maritime sector, and any relevant international evidence on the size of industries within the maritime sector globally and at the country level.

Question 14: Do you have any views on any of the evidence discussed in Chapter 4 and the sources listed in Annex 1?

In particular, please provide views on the strengths and weaknesses of these sources of evidence. For example, for the purposes of assessing the UK maritime sector's performance now and in the future, the robustness of the analytical approaches that have been used, and how frequently the sources are updated.

The role played by maritime businesses in supporting the broader UK economy

Question 15: How could the maritime sector improve its role in supporting the competitiveness of other parts of the UK economy?

Please identify any actions that the maritime sector could take to improve its role in supporting the competitiveness of other parts of the UK economy.

Question 16: Are you able to provide us with any additional evidence on the role played by the maritime sector in supporting the broader UK economy and the ways in which the sector increases the competitiveness of other UK industries?

Please provide any additional evidence on the role played by the maritime sector in supporting the broader UK economy and the ways in which the sector increases the competitiveness of other UK industries. For example, the role of the maritime sector as a key enabler of international trade and in other transport services.

Any other issues

Are there any other relevant issues which are not covered by the questions above that you wish to submit a response and/or evidence on?

Please outline and explain any other issues that could be of relevance to the Maritime Growth Study.

1. How to respond

1.1 The Call for Evidence began on 16 January 2015 and will run until 27 February 2015. Please ensure that your response reaches us before the closing date. If you would like further copies of this document, it can be found at https://www.gov.uk/government/consultations/maritime-growth-study-call-for-evidence or you can contact the Maritime Growth Study Secretariat (details below) if you would like alternative formats (Braille, audio CD, etc).

You can respond by completing the electronic survey at:
https://www.surveymonkey.com/s/maritime-growth-study

Please use the following details for responses in any other format:

Maritime Growth Study: Call for Evidence
UK Maritime Study Secretariat
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Great Minster House
33 Horseferry Road
London SW1P 4DR

Phone number: 020 7944 4542
Fax number: 020 7944 2933

E-mail: ukmaritimestudy@dft.gsi.gov.uk

About you

1.2 To help us understand your responses, please include the following information in your response about you or your organisation or the business that you represent.

1.3 Which of the following categories is most applicable to you?

- I am responding as an individual.
- I am responding as or on behalf of a business organisation.
- I am responding as or on behalf of a non-business organisation (includes industry bodies, trade union, non-governmental organisation and representative bodies etc)*
- I am responding in some other capacity (please provide details)*

**Please give a short description of who your organisation represents and how the views of members have been assembled.*

1.4 What is the approximate size of your business or organisation?

- Up to 9 employees

- 10 to 49 employees
- 50 to 249 employees
- 250 or more employees

1.5 If you would be happy for us to contact you for further information regarding your responses, please supply your contact details with your response.

Freedom of Information

1.6 Information provided in response to this Call for Evidence, including personal information, may be subject to publication or disclosure in accordance with the Freedom of Information Act 2000 (FOIA) or the Environmental Information Regulations 2004.

1.7 If you want information that you provide to be treated as confidential, please be aware that, under the FOIA, there is a statutory Code of Practice with which public authorities must comply and which deals, amongst other things, with obligations of confidence.

1.8 In view of this it would be helpful if you could explain to us why you regard the information you have provided as confidential. If we receive a request for disclosure of the information, we will take full account of your explanation, but we cannot give an assurance that confidentiality can be maintained in all circumstances. An automatic confidentiality disclaimer generated by your IT system will not, of itself, be regarded as binding on the Department.

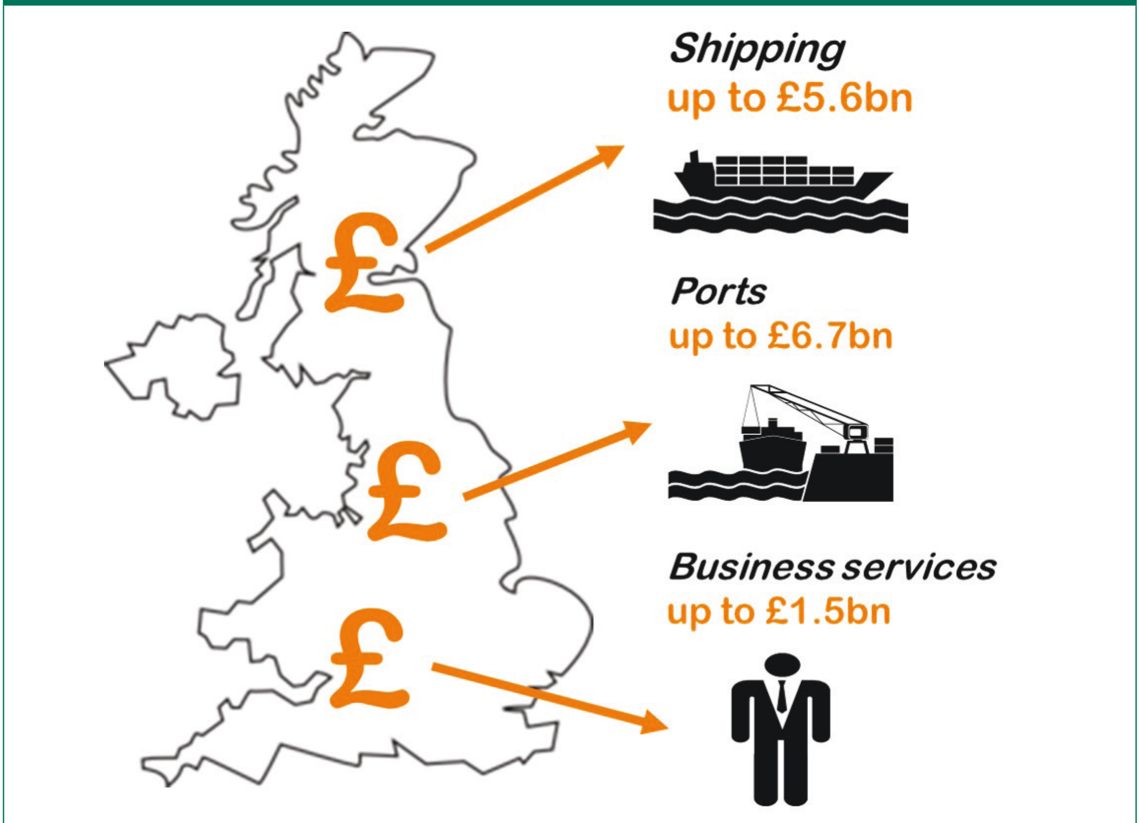
1.9 The Department will process your personal data in accordance with the Data Protection Act (DPA) and in the majority of circumstances this will mean that your personal data will not be disclosed to third parties.

2. Introduction

2.1 As an island trading nation the maritime sector has played a key role in the UK's history and continues to make a vital contribution to the UK economy. Around 95%[2] of the UK's imports and exports of goods currently arrive and depart by sea and therefore the maritime sector is critical to supplying the daily needs of the population. UK maritime business services, such as insurance, are also crucial in keeping world trade moving.

2.2 In addition, the UK shipping, ports and maritime business services sectors are estimated to directly contribute between around £8 billion to £14 billion a year to the UK economy and directly employ up to around 260,000 people (see Chapter 4 for more details). Through their role in enabling the UK to act as a trading state and other wider economic impacts, the overall contribution is very much larger.

Figure 2: UK maritime sector's direct contribution to the economy[1]



2.3 However, after the marked growth of the sector over a number of years, the sector now faces strong competition, particularly from the Far East, with some expressing concern that the UK shipping sector is increasingly

2 Department for Transport (DfT) Statistics

challenged. A recent decline in several indicators of UK shipping interests may be a possible early symptom of this.

2.4 Both Government and industry are keen to ensure that the UK's position as a world-leading maritime centre is maintained and, where possible, to exploit opportunities for further growth. The Government has therefore launched the Maritime Growth Study: *keeping the UK competitive in a global market* to identify where and how improvements can be made to the sector's ability to compete internationally and grow further.

Overview of the Maritime Growth Study

2.5 The Maritime Growth Study is a comprehensive study of the UK maritime sector that will look at all aspects of the sector and:

a. assess the current competitive positioning of individual subsectors in the global market;

b. review the challenges and opportunities going forward, and where appropriate, identify drivers and barriers to further growth; and

c. make recommendations for both Government and industry to improve the sector's international competitiveness.

2.6 The Minister of State for Transport, the Right Honourable John Hayes MP, has appointed Jeffrey Evans (a director at international shipbroker Clarksons and the chairman of Maritime UK) to chair the study. The chair will be supported by a departmental secretariat. A challenge function will be delivered through an industry advisory group led by Michael Parker (Chairman CMA CGM (UK) Holdings Ltd), with members drawn from across the maritime sector.

2.7 The study is due to report in summer 2015 and will include the following stages:

- Stage 1: evidence collection stage. In addition to this call for evidence, this will include research, a literature review and engaging directly with stakeholders.
- Stage 2: consideration and prioritisation of key issues and barriers.
- Stage 3: identification and development of policy recommendations and/or solutions.

2.8 The study's full terms of reference are available to download at https://www.gov.uk/government/publications/maritime-growth-study-terms-of-reference.

Proposed areas of focus within the UK maritime sector

2.9 We are interested in views on the full range of maritime activities undertaken in the UK, including, but not necessarily limited to:

- Ship financing, ownership and operation;
- The provision of maritime business services, including shipbroking, insurance, legal services, classification societies and financial services;

- Maritime education, skills, research and technology;
- Government administration of maritime activities, including ship registration;
- Government regulatory and policy activities affecting the maritime sector;
- Marine manufacturing and engineering.

2.10 Other elements of the sector may also be relevant. For example, the opportunities available to the ports industry to help contribute to the growth of the UK maritime sector.

Defining the international competitiveness of the UK maritime sector

2.11 We are particularly interested in understanding what will help the UK maritime sector to compete internationally and grow, specifically:

a. what attracts maritime businesses to locate in the UK; and

b. what impacts on the ability of maritime businesses located in the UK to compete in the global market.

2.12 Within this, the Maritime Growth Study will consider the relationships between the international competitiveness of maritime businesses in different parts of the UK maritime sector, such as through the impacts of clustering (e.g. businesses may derive productivity benefits from being located close together).

Aim of the Call for Evidence

2.13 This Call for Evidence gives industry, other stakeholders and individuals the opportunity to contribute to the evidence gathering process that will inform the study. This will help us to develop the strongest evidence base to support any conclusions and recommendations that emerge from the study.

2.14 Chapter 3 covers a range of issues under the international competitiveness of the UK maritime sector. The nature of international competition is considered, as well as the relative performance of the UK maritime sector. The chapter also looks at the key factors influencing the ability of the UK maritime sector to compete in the global market, as well as the opportunities and challenges facing the UK maritime sector in the short, medium and long-term.

2.15 Chapter 4 outlines the performance of the UK maritime sector, providing an overview of the sector and the evidence that we have access to on the performance of the sector.

2.16 Chapter 5 looks at the role played by maritime businesses in supporting the broader UK economy and increasing the competitiveness of other UK industries. It considers the way in which international trade is an important driver of economic growth and how maritime is a key enabler of this.

3. International competitiveness of the UK maritime sector

3.1 The primary focus of this Call for Evidence is on the international competitiveness of the UK maritime sector, specifically:

a. what attracts maritime businesses to locate in the UK; and

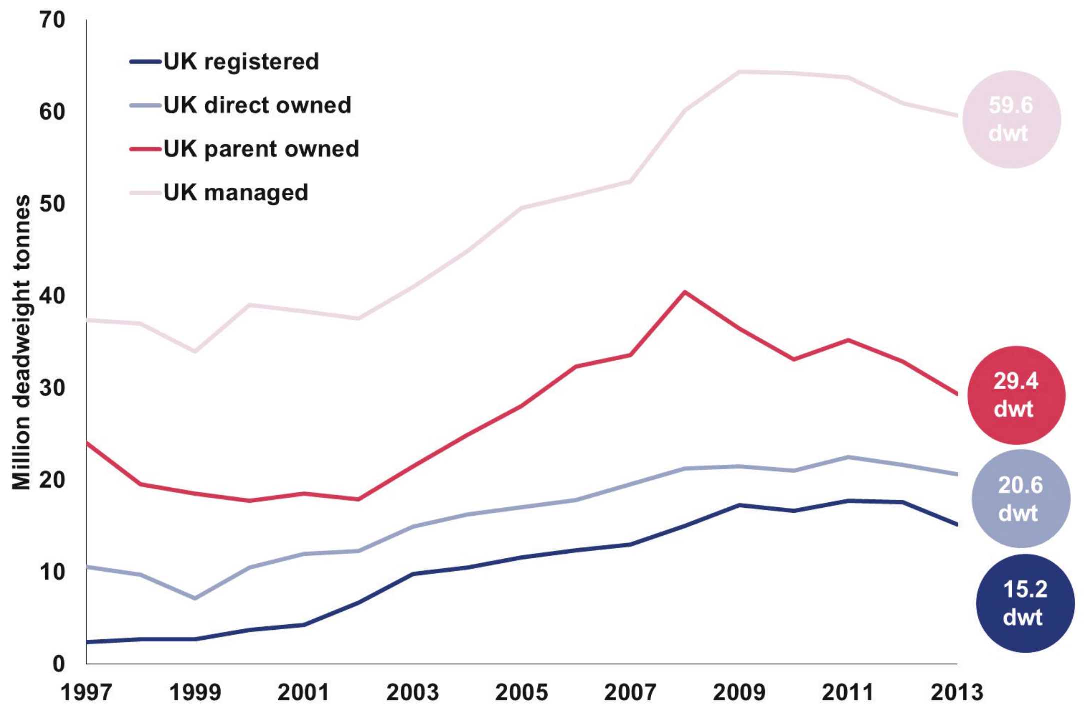
b. what impacts on the ability of maritime businesses located in the UK to compete in the global market.

3.2 The Government is focused on generating an environment in which the maritime sector can thrive. This includes maintaining an attractive Tonnage Tax regime, cutting back on red tape affecting the sector, financially supporting maritime training, collaborating with industry to publish Strategic Partnership Plans (shipping and ports so far) and playing a leading role in London International Shipping Week, which was successfully held for the first time in 2013.

3.3 However, after the marked growth of the sector over a number of years, the sector now faces strong competition, particularly from the Far East, with some expressing concern that the UK shipping sector is increasingly challenged. A recent decline in several indicators of UK shipping interests may be a possible early symptom of this.

3.4 There is no single figure that is appropriate to measure the extent of a country's interests in shipping, but an overview can be provided by looking at the four separate measures shown in Figure 3. According to all four measures, the 'UK fleet' experienced substantial growth between the late 1990s (the previous low point) up until around 2008 (the UK recession).

Figure 3: UK interests in trading vessels over 100gt, 1997 – 2013[3]



3.5 The UK was ranked 10th in the world in 2013, in terms of the deadweight tonnage (dwt) (a measure of carrying capacity) of its registered vessels. The UK's position as a top 10 flag and the strong growth in its flag since 1999 can be largely attributed to the contribution of Crown Dependency registered vessels which make up its total (see Figure 4). If Crown Dependency registered vessels are excluded, the UK's global position drops to 15 and the dwt of its registered vessels shows a fall of 12 per cent since 2009[3] (see Figure 5).

3 Department for Transport (DfT) (2014) 'Shipping fleet statistics: 2013' https://www.gov.uk/government/statistics/shipping-fleet-statistics-2013

Figure 4: Trading vessels registered to the UK, 100gt and over by deadweight tonnage 2009 – 2013[3]

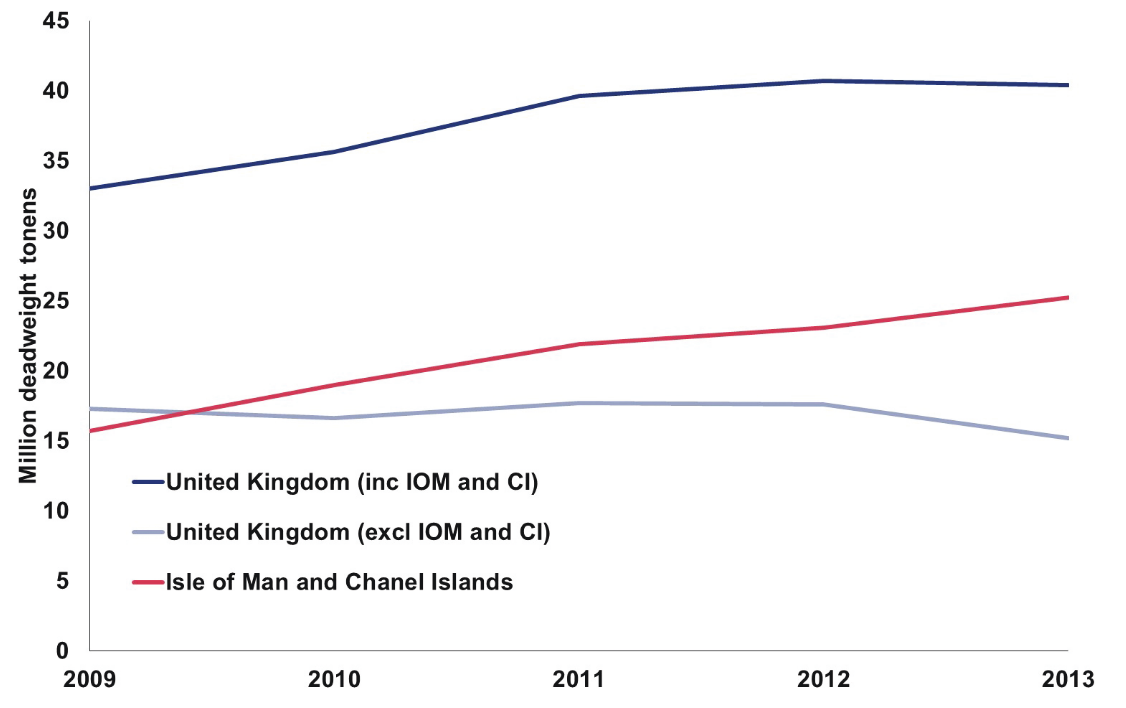
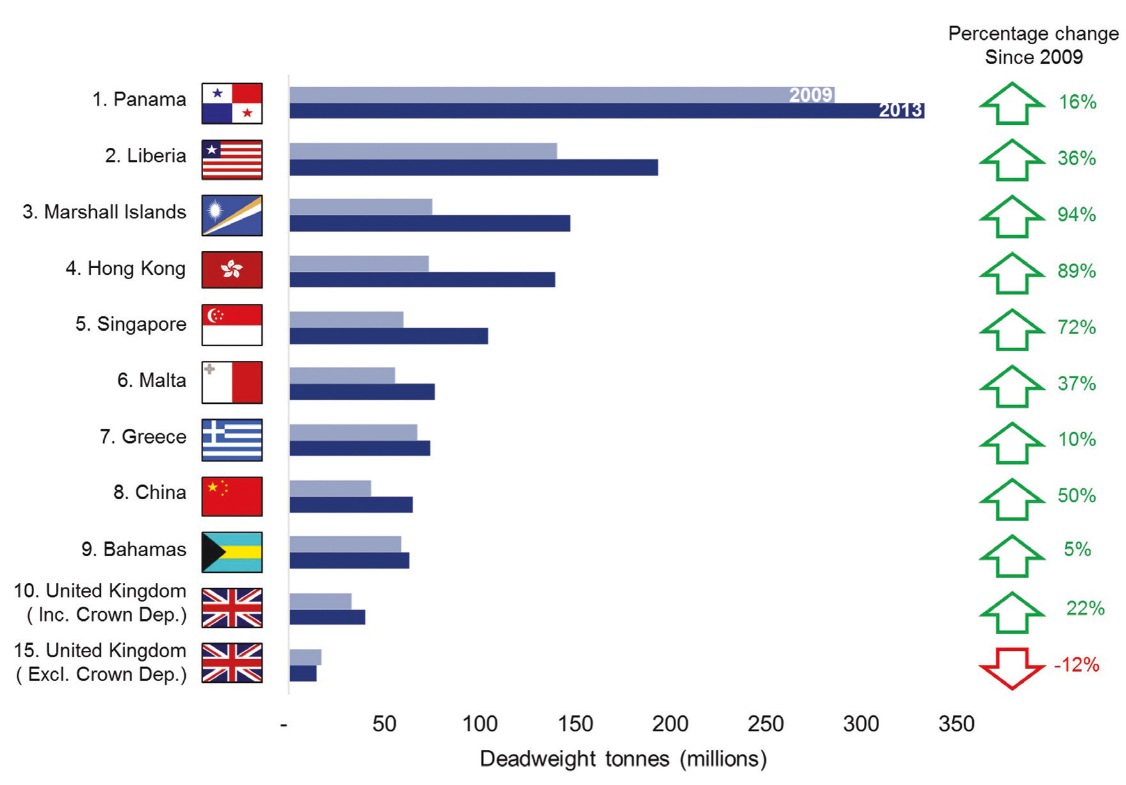


Figure 5: Top 10 Countries registered trading vessels 2013[3]



3.6 Both Government and industry are keen to ensure that the UK's position as a world-leading maritime centre is maintained, and, where possible, to exploit opportunities for further growth. The Government has therefore launched the Maritime Growth Study: *keeping the UK competitive in a global market* to identify where and how improvements can be made to the sector's ability to compete internationally and grow further.

3.7 As well as seeking your views on what improvements could be made, we are keen to develop our evidence on the nature of the international competition faced by the sector; the recent performance of the sector; the sector's strengths and weaknesses; and the opportunities and challenges in the short, medium and long term.

3.8 In addition to this Call for Evidence and other forms of engagement, such as stakeholder events and interviews, the department has commissioned specific research into the international competitiveness of the UK maritime sector. This will complement the responses to the Call for Evidence, and provide further evidence on the international competitiveness of the UK maritime sector now and how this is likely to evolve in the future.

The nature of the international competition facing the UK maritime sector

3.9 A key aspect of assessing the international competitiveness of the sector is to determine the nature of international competition faced by the UK. We believe one of the most important factors is the extent to which a maritime activity could be undertaken in a variety of international locations i.e. its 'international mobility'. For example, shipowners have a wide degree of choice as to where they register their ships. We are therefore particularly interested in understanding the international mobility of maritime activities, including what the key determinants are of this and how it varies across industries within the sector.

Relative performance of the UK maritime sector

3.10 To enable us to develop our assessment of the international competitiveness of the UK maritime sector, we also want to understand how the UK is currently performing relative to its key competitors. We are therefore interested in developing our evidence on both the recent performance of the UK maritime sector and of our key competitors, and how this compares. For example, we would like to understand better the extent to which trends within the sector differ between the UK and our key competitors.

3.11 Chapter 4 summarises our current evidence base on the performance of the UK maritime sector. With respect to the recent performance of our key competitors, we propose looking at the performance of the relevant industries globally and at the country level. In preparing this Call for Evidence, we have undertaken an initial literature review (see Annex 1 for a list of sources that we have identified). We will be undertaking a more detailed evidence review in parallel to the Call for Evidence, and would welcome any additional sources that you are able to identify.

Key factors influencing the international competitiveness of the UK maritime sector

3.12 Another key step in developing our assessment is to identify the main factors that influence the UK's international competitiveness across the UK maritime sector's industries. This includes both the UK's strengths and weaknesses and that of its key competitors. Again, we are interested in understanding this in the context of the attractiveness of the UK as a location for businesses and the ability of UK businesses to compete internationally and whether and how this varies across the industries within the UK maritime sector.

Relationships within the UK maritime sector and with other sectors

3.13 An area that we are keen to understand better is the relationship between industries in different parts of the UK maritime sector and how this affects their international competitiveness. This includes the benefits that arise from maritime businesses being located close together (i.e. clustering) and the linkages between the attractiveness of the UK as a location for maritime businesses and the ability of businesses in other parts of the sector to compete internationally. For example, the impact of the UK's ability to attract shipowners to locate here on the capability of UK maritime business services, such as shipbroking, to compete in the global market.

The role of Government administration of maritime activities

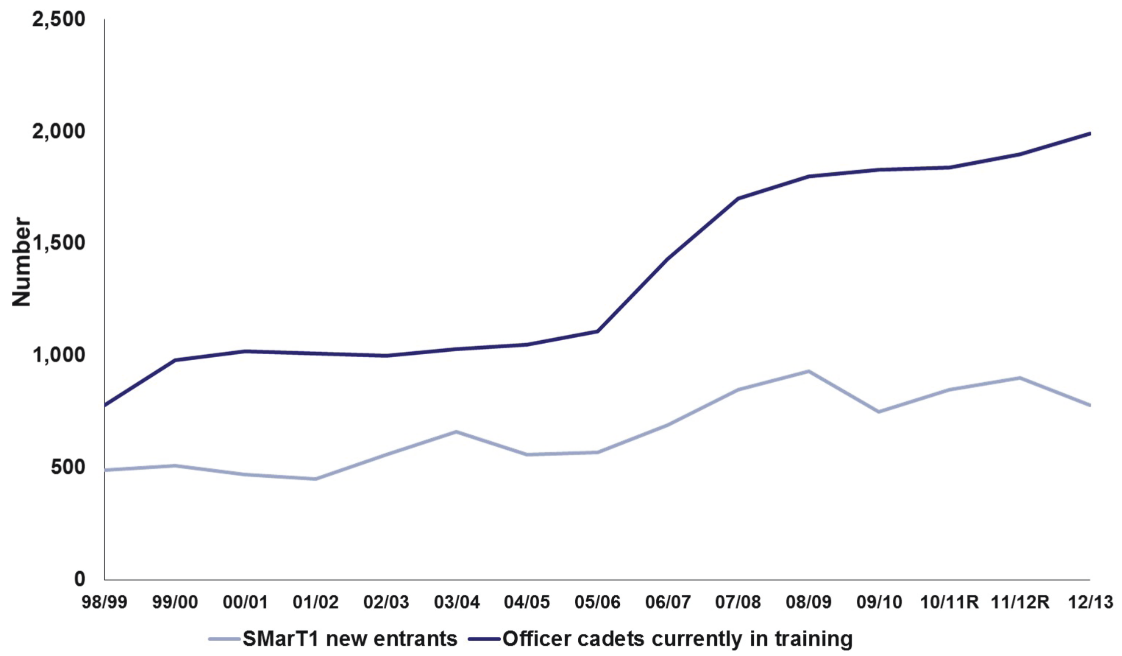
3.14 The Department has overall responsibility for maritime policy in the UK. However, the Department for Business, Innovation and Skills leads on maritime issues such as marine manufacturing/engineering, maritime business services and apprenticeships. HM Treasury has responsibility for tonnage tax policy. In addition, there are other parts of Government that deal with other associated or related maritime/marine activity.

3.15 The Department is supported by the Maritime and Coastguard Agency (MCA), the Marine Accident Investigation Branch (MAIB) and the General Lighthouse Authorities (GLAs) which provide a range of maritime delivery functions.

3.16 The MCA is an executive agency of the Department with responsibilities including the administration of the UK Ship Register, the provision of search and rescue facilities and the development and implementation of international and domestic safety standards. The MAIB is an independent unit within the department which investigates marine accidents involving UK-flagged vessels worldwide and all vessels in UK waters. The GLAs are executive non-departmental public bodies responsible for aids to navigation.

3.17 As the maritime sector operates on a largely international basis, there is a significant role for governments to play to ensure the safety and security of shipping and its people around the world. In light of the UK's rich maritime heritage, the Government has taken a key interest in ensuring that trading by sea can operate peaceably and without undue interference. The Government has continued to invest in the UK Ship Register, give advice to shipowners and operators and to promote its excellent training and educational facilities. The Government provides £15m of support to Maritime Training (SMarT), which contributes significantly towards the costs of training Merchant Navy ratings and officer cadets, as well as existing seafarers who undertake further professional training. In 2012/2013, there were 780 new entrants on the Government's SMarT1 training scheme, 39 per cent more than 10 years ago. In the same year the estimated total number of officer cadets in training reached a high of 1,990 (see Figure 6). This was 5 per cent higher than the previous year and a 99 per cent increase on 10 years previously[4].

Figure 6: UK officer cadets: 1999 – 2013[4]



3.18 As a result of this interest, the Government has played an active role at the International Maritime Organization (IMO) and other international bodies to determine the appropriate level of standards for ships, the appropriate rules for navigation and safe passage and for the wellbeing of crew members. At the IMO in London, in other Governmental negotiations, and in its administration of maritime activities both internationally and domestically, the UK has maintained its reputation as a quality flag with excellent historical insight and with a background of providing high educational and training standards.

3.19 However, the latest evidence shows that in terms of total deadweight tonnage, the UK Ship Register (excluding Crown Dependencies) has declined by 12% since 2009. In the same timeframe, the top 9 ship registers in terms of deadweight tonnage have all seen an increase in total deadweight tonnage (see Figure 5)[3]. So, a specific area that we would welcome your input on is the relationship between the performance of the UK Ship Register, and the international competitiveness of the UK maritime sector.

4 Department for Transport (DfT) (2014) 'Seafarer statistics: 2013' https://www.gov.uk/government/statistics/seafarer-statistics-2013

3.20 We would also welcome your input on the role of Government administration of maritime activities more generally in determining the international competitiveness of the UK maritime sector. In particular, we would welcome your views on the relative merits of the delivery model adopted by the UK at present, and how this differs from the approach taken by our key competitors.

Promotion of our maritime activities

3.21 London International Shipping Week in September 2013 was a remarkable success, as it demonstrated how effective a joint Government and industry initiative could be in showcasing what the UK maritime sector has to offer the rest of the world. A similar event is planned for September 2015. While this type of event can play its part, we would welcome your views on how Government and industry can work together and separately to promote the UK as a location to do maritime business.

3.22 We would be particularly interested in learning from previous examples of successful initiatives or campaigns. These examples may be maritime related, but could also come from other sectors, where Government has supported an industry to promote the UK. We would also be keen to understand where other countries have been successful at promoting their maritime businesses and how the Government's administration of maritime activities could generate opportunities for promotion.

Opportunities and challenges facing the UK maritime sector in the short, medium and long-term

3.23 It is also important to assess how the international competitiveness of the UK maritime sector is likely to evolve in the future, and consider what actions that Government and industry could take to improve the sector's international competitiveness and generate growth.

3.24 To enable us to understand better how the international competitiveness of the UK maritime sector is likely to evolve in the future, we are particularly keen to develop our evidence base on the key factors that will influence the growth of the UK maritime sector, and the key opportunities and challenges facing the UK as a result. For example, we would welcome any forecasts of future growth in, and technology developments likely to affect, the maritime sector that respondents are able to provide.

3.25 With respect to the actions that Government and industry could take, we would particularly welcome your views on what actions could be taken to encourage more maritime businesses to locate in the UK, improve the ability of maritime businesses to compete in the global market; and better promote the UK as a place that is open for maritime business.

Questions

The attractiveness of the UK as a place for maritime businesses to locate

Question 1: What are the key factors that determine in which country you locate your activities?

Please detail the factors that are typically considered when deciding the country in which maritime businesses locate their activities e.g. location of key clients, availability of key services, skills, transport links or international mobility. With regard to shipowners, we are particularly interested in whether ship registration is a key factor, and if so, how it impacts decisions about which country activities are located.

Question 2: What do you think the key strengths and weaknesses of the UK are as a location for maritime businesses?

Please provide an assessment of the key strengths and weaknesses of the UK as a location for maritime businesses. For example, the linkages between industries within the UK maritime sector and with other sectors or the role played by Government administration of maritime activities, including activities such as ship registration.

Question 3: In your experience, how internationally competitive is the UK as a place for maritime businesses to locate compared to other countries?

Please provide an assessment of how internationally competitive the UK is as a place for maritime businesses to locate compared to other countries. In particular, which key countries are competing with the UK as a place for maritime businesses to locate and what are the key factors that are used to determine how internationally competitive the UK is as a place for maritime businesses to locate compared to these countries.

The ability of UK based maritime businesses to compete internationally

Question 4: What are the key factors that determine which country's maritime services you use?

Please outline and explain the factors that are typically taken into account in deciding which service providers (shipping, ports, insurers, trainers, shipbrokers etc.) to use (e.g. price, skills, reputation, geographical proximity, linkage with country of vessel registration etc).

Question 5: What are the key strengths and weaknesses of the UK maritime sector in supplying maritime services?

Please provide an assessment of the key strengths and weaknesses of the UK in supplying maritime services and that influence the sector's ability to compete internationally. For example, the linkages between industries within the UK maritime sector and with other sectors, the role played by Government administration of maritime activities.

Question 6: In your experience, how internationally competitive are UK based maritime businesses compared to those in other countries?

Please provide an assessment of how internationally competitive UK based maritime businesses are compared to those in other countries. In particular, where are the key international competitors of UK based maritime businesses located. Also what are the key factors that are used to determine how internationally competitive UK based maritime businesses are compared to those in other countries. Evidence on the recent performance of UK based maritime businesses and key international competitors, specifically which industries in the sector have done best and why, would be particularly welcome.

Opportunities and challenges

Question 7: What are the key opportunities for growing the UK maritime sector in the UK over the short, medium and long-term?

Please provide an assessment of the key opportunities for growth in the sector going forward.

Question 8: What are the key challenges to the growth of the UK maritime sector over the short, medium and long-term?

Please provide an assessment of the key challenges to the growth of the sector going forward.

Question 9: What are the key actions that Government and UK based industry could take to encourage more maritime businesses to locate in the UK?

Please identify specific actions that Government and industry could take either separately or together, in particular, non-fiscal initiatives that would have a significant effect. For example, what actions could Government and industry take to improve the promotion of the UK as a place that is open for maritime business and are there any lessons that the UK could learn from other countries and other maritime administrations.

Question 10: What are the key actions that Government and UK based industry could take to encourage more businesses to use UK based maritime services?

Please identify specific actions that Government and industry could take either separately or together, in particular, non-fiscal initiatives that would have a significant effect. For example, what actions could Government and industry take to improve the promotion of the UK as a place that is open for maritime business and are there any lessons that the UK could learn from other countries and other maritime administrations.

4. Performance of the UK maritime sector

4.1 As part of this Call for Evidence, we are keen to develop our evidence base on the performance of the UK maritime sector:

- to enable us to understand better how the UK is currently performing relative to its key competitors; and
- in order to be able to better assess the UK maritime sector's performance in the future, including when assessing the impact of actions taken in response to any recommendations of the Maritime Growth Study.

4.2 This section summarises the evidence that we have access to on the performance of the UK maritime sector.

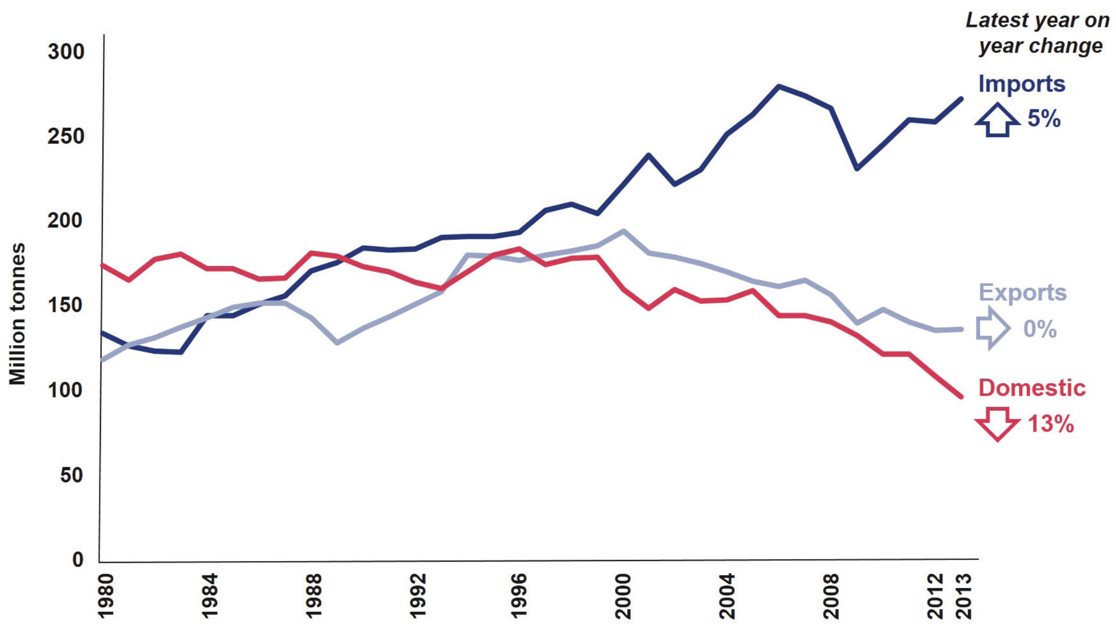
Overview of the UK maritime sector

4.3 Shipping is a complex international business and many different parties, often based in different countries, may have a commercial interest in a single vessel. The UK's shipping sector has commercial interests in a range of vessel types from bulk carriers to passenger ships. For example, in total there were 655 trading vessels, owned by a UK company (excluding the Channel Islands and Isle of Man) as at the end of 2013 with a cargo carrying capacity of around 20.6 million deadweight tonnage (dwt) in total (1.3% of the global total)[3].

4.4 Port traffic covers a diverse range of cargo types from bulky raw materials to manufactured consumer goods. In total, UK ports handled around 503 million tonnes of port traffic in 2013 (see Figure 7), including around 4.9 million containers. Ports are located at a wide variety of locations across the UK and often specialise in certain cargo types. For example, the Port of Milford Haven in Pembrokeshire handled the most liquid bulk whereas the Port of Felixstowe in Suffolk was the busiest port for containers[5].

5 Department for Transport (DfT) (2014) 'Port freight statistics: 2013 final figures' https://www.gov.uk/government/statistics/port-freight-statistics-2013-final-figures

Figure 7: Freight handled by UK ports, 1980 – 2013[5]



4.5 Maritime business services include shipbroking, maritime insurance, maritime legal services, classification societies and maritime financial services. The UK maritime business services sector is geographically concentrated in London and has substantial commercial interests in all of the key maritime business services. Table 1 below summarises the available evidence on UK businesses' share of the global market in these services from a recent TheCityUK report[6].

Table 1 – International market share of UK maritime business services in 2011[6,7]

Ship finance	9%
Insurance – underwriting	21%
Insurance – P&I Clubs	61%
Lloyd's Register	18%
Shipbroking (estimates)	
• Tanker chartering	50%
• Dry bulk chartering	30% to 40%
• Second hand tonnage	50%

4.6 The UK maritime education, skills and training sector includes 24 universities and colleges[6], and comprises both specialised research and teaching, and vocational education and training (e.g. in 2012/13, there were

6 TheCityUK (2013) 'Maritime Business Services, September 2013' http://www.thecityuk.com/assets/Uploads/Maritime-Business-Services-2013-L.pdf

7 The original sources are as follows: International Union of Marine Insurance, Lloyd's Register, Baltic Exchange, TheCityUK estimate.

1,990 officer cadets in training in total, an increase of 155% on 1998/99[4]). In total, the available evidence from a TheCityUK report indicates that there were over 10,000 students undertaking maritime-related courses[6] in 2010/11.

Direct, indirect and induced impacts

4.7 There are several ways in which we can assess the performance of the UK maritime sector.

a. **Direct impacts** are the economic impacts that directly arise as a result of creating the goods and/or services that are supplied by the sector ('the sector's output'). For example, a direct impact of the UK shipping sector is the number of people that are directly employed by businesses in the sector.

b. **Indirect impacts** are the economic impacts that arise indirectly in other sectors as a result of the expenditure on the goods and services that are used as inputs to create the goods or services that are supplied by the sector (the sector's 'intermediate consumption'). For example, an indirect impact of the UK shipping sector is the number of people working in the fuel industry due to the UK shipping sector's expenditure on fuel.

c. **Induced impacts** are the economic impacts that arise due to expenditure on goods and services elsewhere in the economy by workers in the sector. For example, an induced impact of the UK shipping sector is the number of people that work in the food retail industry due to the expenditure by workers in the UK shipping industry on food.

4.8 When assessing the performance of the UK maritime sector, the Department has focussed on assessing the direct impacts of the sector to date. However, the industry-backed research undertaken by Oxford Economics has also estimated the indirect impacts and induced impacts of the sector. We are interested in any evidence that respondents can provide on each of these impacts.

Direct contribution to Gross Value Added

4.9 Gross value added (GVA) measures the net contribution of a sector to the UK economy. It is calculated as the value of the sector's output minus the value of its intermediate consumption. On the basis of the available evidence for 2011, the UK maritime sector is estimated to directly contribute around £7.6 billion to £13.8 billion of GVA to the UK economy. This is broken down into:

a. Shipping GVA: £4.7 billion (2011/ONS)[8] to £5.6 billion (2011/Oxford Economics)[1];

8 DfT estimates using ONS (2014) 'Annual Business Survey, 2013 Provisional Results' and ONS (2014) 'Input-Output Supply and Use Tables, 2014 Edition'
http://www.ons.gov.uk/ons/rel/abs/annual-business-survey/2013-provisional-results/index.html
http://www.ons.gov.uk/ons/rel/input-output/input-output-supply-and-use-tables/2014-edition/index.html

b. Ports GVA: £1.4 billion (2011/ONS)[8] to £6.7 billion (2011/Oxford Economics)[1]; and

c. Maritime Business Services GVA: £1.5 billion (2011/Oxford Economics)[1].

4.10 The full list of sources that we have access to is presented in Annex 1. The summary above is based on departmental estimates using Office for National Statistics (ONS) Input-Output Supply and Use Tables and the ONS Annual Business Survey; and the results of the research undertaken by Oxford Economics. We are in the process of refining the approach that we use to estimate the UK maritime sector's direct contribution to GVA, and would welcome any views that you have on this issue. In particular, we want to improve our evidence base on the trends in the UK maritime sector's direct contribution to GVA. Given that this can be distorted by inflation, we want to improve our evidence on the trends in GVA in constant prices; this is GVA after removing the effects of inflation by holding prices constant.

Direct employment

4.11 On the basis of the maritime-specific sources that we have access to, the UK maritime sector is estimated to directly employ up to around 263,000 people. This is broken down into:

a. Shipping employment: 146,000 (2011/Oxford Economics)[1];

b. Ports employment: 58,000 (2009/10/DfT)[9] to 107,000 (2011/Oxford Economics)[1]; and

c. Business Services employment: 10,000 (2011/Oxford Economics)[1].

4.12 The full list of sources that we have access to is presented in Annex 1. As with the GVA estimates, we are in the process of refining the approach that we use to assess the number of people that are directly employed by the UK maritime sector, and would welcome any views that you have on this issue. In particular, we are interested in better understanding the pros and the cons of the different approaches that we could use.

Direct tax revenues

4.13 We want to improve our evidence base on the direct tax revenues from the UK maritime sector. The only source that we currently have access to is the work undertaken by Oxford Economics (see Annex 1). Oxford Economics estimate that the UK maritime sector's direct tax revenues were around £3 billion in 2011[1].

4.14 We are keen to explore any alternative approaches that could be used. We would welcome any views that you have on this issue.

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9 DfT (2010) 'Port Employment and Accident Rates 2009/10' https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/236125/port-employment-and-accident-rates-full-report-2009-10.pdf

Indirect and induced impacts

4.15 We want to improve our evidence base on the UK maritime sector's indirect and induced impacts. The only source that we currently have access to is the work undertaken by Oxford Economics (see Annex 1). For example, Oxford Economics' estimate that including the indirect and induced impacts increased the UK maritime sector's contribution to GVA to around £32 billion in 2011[1]. We are keen to explore any alternative approaches that could be used, and would welcome any views that you have on this issue.

Questions

Measuring the performance of the UK maritime sector

Question 11: What metrics could the Government use to assess the UK maritime sector's performance now and in the future?

In particular, please provide views on the metrics that are discussed in Chapter 4 (e.g. Gross Value Added, Employment, Tax Revenues), and suggestions on any other metrics that the Government could use to assess the UK maritime sector's performance now and in the future.

Question 12: Do you have any views on the analytical approach we should use to measure the performance of the UK maritime sector?

In particular, please provide views on how we could estimate the UK maritime sector's direct contribution to the UK economy, the number of people that are directly employed by the UK maritime sector and the UK maritime sector's direct tax revenues; also how we can produce a time series of the UK maritime sector's direct contribution to the UK economy in constant prices; and estimate the UK maritime sector's indirect and induced impacts.

Question 13: Are you able to provide us with any additional evidence on the size of the UK maritime sector, and the size of its key competitors?

In particular, please provide any further evidence on the size of the UK maritime sector, and any relevant international evidence on the size of industries within the maritime sector globally and at the country level.

Question 14: Do you have any views on any of the evidence discussed in Chapter 4 and the sources listed in Annex 1?

In particular, please provide views on the strengths and weaknesses of these sources of evidence. For example, for the purposes of assessing the UK maritime sector's performance now and in the future, the robustness of the analytical approaches that have been used, and how frequently the sources are updated.

5. The role played by maritime businesses in supporting the broader UK economy

5.1 The terms of reference for the Maritime Growth Study explain that the study will have regard for the role played by the maritime sector in supporting the broader economy and ways in which the sector increases the competitiveness of other UK industries. This section outlines what we currently know about this role and highlights where additional evidence could be helpful.

International trade is an important driver of economic growth

5.2 The UK trade to Gross Domestic Product (GDP) ratio was 65.3 in 2012, up from 54.5 in 2002. This meant that, in 2012, the UK had the second-highest trade to GDP ratio in the G8 behind Germany[10].

5.3 International trade is vital to any successful modern economy. In recent decades, the degree to which countries are engaging in and prospering from international trade has risen considerably. For example, there was a quadrupling of the volume of trade in goods between 1980 and 2008 – twice the rate of growth in global GDP[11].

5.4 At the national level, international trade is closely linked with economic growth. International trade contributes to economic growth by improving productivity and innovation across the UK economy, including by enabling UK businesses to benefit from economies of scale by providing them with access to larger markets, increasing the competition faced by UK businesses and facilitating the dissemination of knowledge and innovation through our economy[12].

10 Department for Business, Innovation & Skills (BIS) (2013) 'Openness to trade: exports plus imports as a share of GDP, ranked against major competitors' https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/269948/BIS_performance_indicators_Openness_to_trade_2_.pdf

11 BIS estimates based on World Trade Organization data. Source: BIS (2011) 'Global context – How has world trade and investment developed, what's next?' https://www.gov.uk/government/publications/global-context-how-has-world-trade-and-investment-developed-whats-next-trade-and-investment-analytical-papers-topic-1-of-18

12 See, for example, BIS (2011) 'Economic openness and economic prosperity' https://www.gov.uk/government/publications/economic-openness-and-economic-prosperity-trade-and-investment-analytical-papers-topic-2-of-18

Maritime is a key enabler of international trade

13. Transport and distribution are two of the key considerations for businesses that are engaged in the import and export of goods around the world. In particular, it is important that they choose the right mode of transport to ensure that their operation is as efficient and cost-effective as possible.

5.5 Maritime transport is therefore essential to international trade as it enables the shipment of large volumes of goods at comparatively low transport costs, resulting in a rapid rise in world seaborne trade in recent decades[13].

5.6 As an island nation, maritime is particularly important for the UK. In 2014, the UK's liner shipping connectivity was ranked 9th in the world according to analysis by the United Nations Conference on Trade and Development (UNCTAD)[14], and the quality of port infrastructure in the UK was ranked joint 16th in the world according to a World Economic Forum survey[15].

5.7 By weight, the UK relies on maritime for around 95% of its imports and export[2]. Maritime specialises in transporting products with a low value to weight ratio. As a result, maritime transport moves a smaller proportion of the international trade in goods by value than by weight. For example, in 2013, the proportion of the total trade between the UK and non-European Union (EU) countries that was transported by sea is estimated at around 98% by weight and around 48% by value. These goods were worth around £192.3 billion, comprising around £67.8 billion of exports and around £124.6 billion of imports[16]. Figure 8 below shows the breakdown of the goods exported, illustrating the particular importance of machinery and transport equipment. Much of this relates to the UK automotive industry, reflecting the key role of the maritime sector in supporting this important sector.

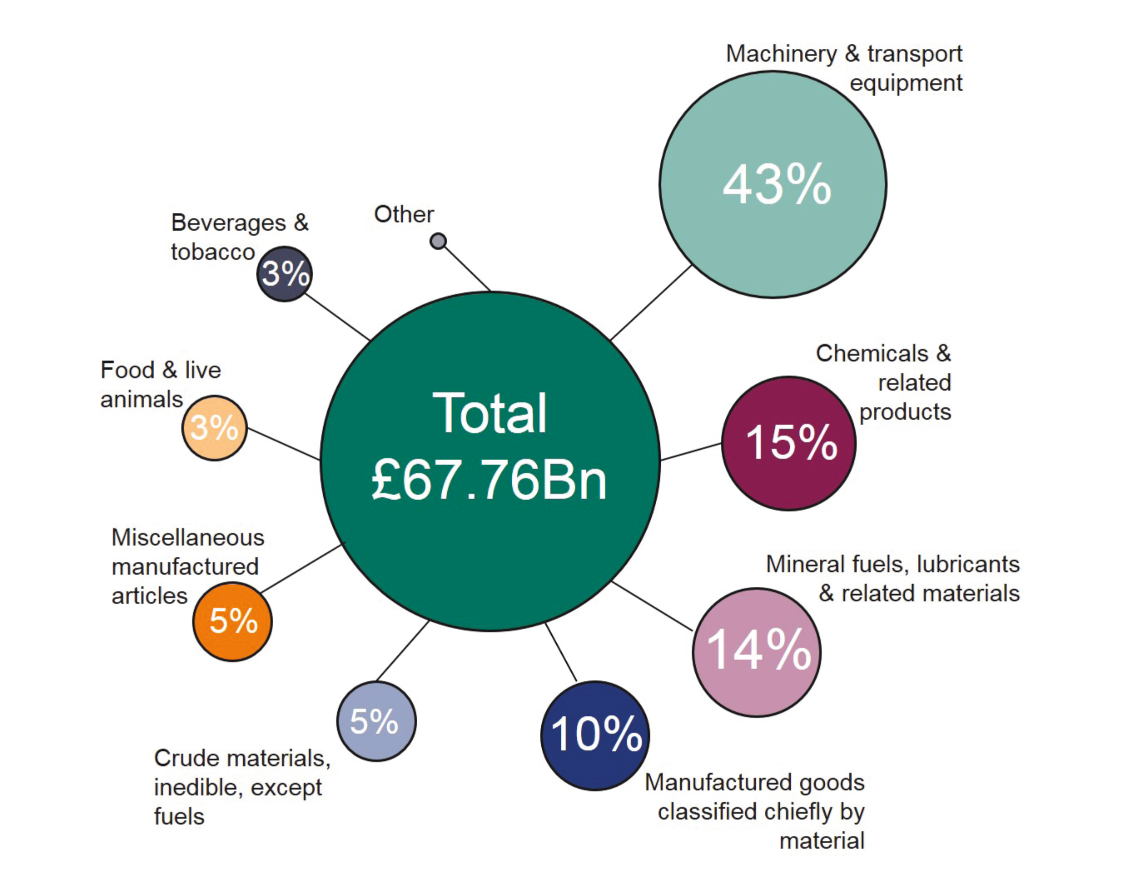
13 For example, United Nations Conference on Trade and Development (UNCTAD) data on world seaborne trade indicates that total goods unloaded increased by approximately 250% between 1970 and 2011 (Source: UNCTADstat 'World seaborne trade by types of cargo and country groups, annual, 1970-2011' http://unctadstat.unctad.org/wds/TableViewer/tableView.aspx?ReportId=32363).

14 Liner shipping connectivity index computed by UNCTAD. Source: The World Bank 'Liner shipping connectivity index' http://data.worldbank.org/indicator/IS.SHP.GCNW.XQ

15 Data from the World Economic Forum's Executive Opinion Survey. Source: The World Bank 'Quality of port infrastructure, WEF' http://data.worldbank.org/indicator/IQ.WEF.PORT.XQ

16 HM Revenue and Customs (HMRC) (2013) Overseas Trade Statistics

Figure 8: UK sea freight exports (extra-EU) by value, 2013[16]



5.8 Other modes of transport have different advantages and disadvantages, and contribute to international transport in other ways. However, although the aviation sector dominates long distance international passenger transport, maritime continues to have an important role in transporting passengers. Maritime transport also proves to be desirable for specific reasons. For example, sea passenger travel continues to be crucial when taking a car abroad; and around 1.9 million passengers went on cruises in 2013, approximately 15 times more than 30 years ago[17].

17 Department for Transport (DfT) (2014) 'Sea Passenger Statistics: Final 2013' https://www.gov.uk/government/statistics/final-sea-passenger-statistics-2013

Questions

The role played by maritime businesses in supporting the broader UK economy

Question 15: How could the maritime sector improve its role in supporting the competitiveness of other parts of the UK economy?

Please identify any actions that the maritime sector could take to improve its role in supporting the competitiveness of other parts of the UK economy.

Question 16: Are you able to provide us with any additional evidence on the role played by the maritime sector in supporting the broader UK economy and the ways in which the sector increases the competitiveness of other UK industries?

Please provide any additional evidence on the role played by the maritime sector in supporting the broader UK economy and the ways in which the sector increases the competitiveness of other UK industries. For example, the role of the maritime sector as a key enabler of international trade and in other transport services.

Annex 1. Sources

A1.1 This Annex lists the main sources of evidence that we have access to on the size of the UK maritime sector, and the relevant international evidence that we have access to on the size of the industries within the maritime sector globally and at the country level.

A1.2 For each of the Office for National Statistics (ONS) data sources that are listed, we have also clarified which metric each source includes data on and which parts of the UK maritime sector it covers.

A1.3 It should be noted that only the latest version of each source that we know of is listed and earlier versions may be available.

Evidence on the UK maritime sector

DfT (2010) 'Port Employment and Accident Rates 2009/10', Produced for Department for Transport by Databuild[18]

ONS (2014) 'Annual Business Survey, 2013 Provisional Results'[19]
[Note – This includes data on Gross Value Added for Shipping and Ports]

ONS (2014) 'Business Register and Employment Survey (BRES), 2013 provisional[20] *[Note – This includes data on Employment for Shipping and Ports]*

ONS (2014) 'GDP(O) Low Level Aggregates Q3 2014 – Month 3'[21]
[Note – This includes data on Gross Value Added for Shipping]

ONS (2014) 'Input-Output Supply and Use Tables, 2014 Edition'[22]
[Note – This includes data on Gross Value Added for Shipping]

ONS (2014) 'United Kingdom Balance of Payments, 2014'[23]
[Note – This includes data on UK exports and imports of Sea Transport services]

Oxford Economics (2013) 'The economic impact of the UK Maritime Services Sector', A report for Maritime UK[24]

Oxford Economics (2012) 'The economic impact of the UK Maritime Services Sector: Business Services', A report for Maritime UK[25]

18 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/236125/port-employment-and-accident-rates-full-report-2009-10.pdf
19 http://www.ons.gov.uk/ons/rel/abs/annual-business-survey/2013-provisional-results/index.html
20 http://www.ons.gov.uk/ons/rel/bus-register/business-register-employment-survey/2013-provisional/index.html
21 http://www.ons.gov.uk/ons/rel/naa2/quarterly-national-accounts/q3-2014/rft-gdp-o--lower-aggregate-data.xls
22 http://www.ons.gov.uk/ons/rel/input-output/input-output-supply-and-use-tables/2014-edition/index.html
23 http://www.ons.gov.uk/ons/rel/bop/united-kingdom-balance-of-payments/2014/index.html
24 http://www.ukchamberofshipping.com/media/filer_public/c9/ea/c9ea03a4-2344-43ee-bb60-dc5386e3c08c/economic_impact_of_uk_maritime_services_sector_-_feb_2013_including_regional.pdf
25 http://www.ukchamberofshipping.com/media/filer_public/93/e7/93e7cb50-616f-4a69-803b-d2c460ab9149/oxford_economics_2012_report_on_maritime_business_services.pdf

Oxford Economics (2012) ‘The economic impact of the UK Maritime Services Sector: Ports’, A report for Maritime UK[26]

Oxford Economics (2012) ‘The economic impact of the UK Maritime Services Sector: Shipping’, A report for Maritime UK[27]

The Crown Estate (2008) ‘Socio-economic indicators of marine-related activities in the UK economy’[28]

TheCityUK (2013) ‘Maritime Business Services, September 2013’[29]

UK Chamber of Shipping ‘Annual Sea Inquiry’

UK Chamber of Shipping ‘Manpower Survey’

International evidence on the size of the industries within the maritime sector globally and at the country level

BIMCO/ISF (2010) ‘Manpower 2010 Update: Highlights’[30]

Business Research & Economic Advisors (BREA) (2014) ‘The Global Economic Contribution of Cruise Tourism 2013’, Prepared for Cruise Lines International Association (CLIA)[31]

Eurostat (2014) ‘Impact of the economic crisis on maritime sectors’[32], and related data sources

IHS Global Insight (2009) ‘Valuation of the Liner Shipping Industry’[33]

Oxford Economics (2014) ‘The economic value of the EU shipping industry’, A report for the European Community Shipowners’ Associations (ECSA)[34]

U.S. Bureau of Economic Analysis (BEA) ‘Gross-Domestic-Product-(GDP)-by-Industry Data’[35]

26 http://www.ukchamberofshipping.com/media/filer_public/da/94/da94ce2a-c813-4ed4-98d4-bf2660a52625/oxford_economics_2012_report_on_ports.pdf
27 http://www.ukchamberofshipping.com/media/filer_public/5f/10/5f101542-280a-4d05-89bf-f381528dec50/oxford_economics_2012_report_on_shipping.pdf
28 http://www.thecrownestate.co.uk/media/5774/socio_economic_uk_marine.pdf
29 http://www.thecityuk.com/research/our-work/reports-list/maritime-business-services-2013/
30 https://www.bimco.org/News/2010/11/~/media/About/Press/2010/Manpower_Study_handout_2010.ashx
31 http://www.cruising.org/sites/default/files/pressroom/Global_Cruise_Impact_Analysis_2013.pdf
32 http://ec.europa.eu/eurostat/statistics-explained/index.php/Impact_of_the_economic_crisis_on_maritime_sectors
33 http://www.worldshipping.org/pdf/Liner_Industry_Valuation_Study.pdf
34 http://www.ecsa.eu/images/2014-04-01%20Oxford%20Economics%20ECSA%20Report%20FINAL.pdf
35 http://www.bea.gov/industry/gdpbyind_data.htm