

# MARITIME GROWTH STUDY: KEEPING THE UK COMPETITIVE IN A GLOBAL MARKET

## TERMS OF REFERENCE

### **Purpose:**

1. A comprehensive study of the UK maritime sector that:
  - a. assesses the current competitive positioning of individual subsectors in the global market;
  - b. reviews the challenges and opportunities going forward, and where appropriate, identifies drivers and barriers to further growth;
  - c. makes recommendations for both Government and industry to improve the sector's international competitiveness.

### **Scope:**

2. The study will:
  - Take an overview of a wide range of activities associated with the UK maritime sector, with the primary focus being on, but not necessarily limited to:
    - Ship financing, ownership and operation;
    - The provision of maritime business 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.
  - Other elements of the sector will also be considered, including for example, opportunities for the ports sector to contribute to growth.
  - Identify, on the basis of a wide consideration of evidence:
    - lessons to be learned from cases where the UK is already highly competitive;
    - drivers of potential further growth and any barriers holding back growth;
    - ways in which Government and industry can together better promote the UK as a place to do maritime business and as a leading world maritime centre.
  - Take full account of the position of the UK maritime sector in the global market compared with that of other countries deemed successful at attracting international maritime business and that have seen growth in this area;
  - 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;

- Consider a UK wide perspective, inviting the Devolved Administrations to contribute, and working closely with them;
- Take appropriate account of existing work within the Maritime and Coastguard Agency (MCA) to modernise the UK Ship Register to avoid duplication and ensure alignment;
- Engage openly with and seek views from interested parties from across the maritime and business spectrum to obtain a fully informed and balanced view;
- Ensure that any recommendations are fiscally neutral in line with the Government's wider economic strategy;
- Ensure that, in making any recommendations, explicit consideration is given to steps that the UK could take, either domestically or internationally, to address greenhouse gas emissions from the maritime sector, but always with due regard to our international competitiveness.

### **Timing and Final Report:**

3. The final report will be presented to Government during summer 2015 and should include:
  - An assessment of the UK's competitive position across the subsectors within the maritime sector;
  - A review of the challenges and opportunities for the sector going forward;
  - An explanation of the most relevant and major drivers of and barriers to growth;
  - Recommendations to improve the future performance of the UK's maritime sector;
  - Recommendations on how Government and industry might, jointly, better promote the UK as place that is open for maritime business;
  - Recommendations to allow ongoing assessment of the sector's performance into the future; and
  - Consideration of how the maritime sector can improve its role in supporting the competitiveness of other parts of the UK economy.

### **Process:**

4. The study will include the following stages:
  - Stage 1: evidence collection stage. This will include a call for evidence to industry, research, 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.

**Governance and Resourcing:**

5. The Minister of State for Transport, the Rt Honourable John Hayes MP, has appointed Jeffrey Evans to chair the study. The chair will be supported by a DfT secretariat. A challenge function will be delivered through an industry advisory group led by Michael Parker, with members drawn from across the maritime sector. The group will agree its terms of reference at its first meeting.