



Maritime Skills Alliance evidence to the Maritime Growth Study, February 2015

The Maritime Skills Alliance creates and promotes apprenticeships and qualifications for the wider maritime sector. We are funded by our 16 members, a uniquely broad mix:

- Border Force
- British Marine Federation
- British Tugowners Association
- Company of Watermen and Lightermen
- International Jack Up Barge Operators' Association
- International Association of Maritime Institutions
- Maritime and Coastguard Agency
- Marine Society and Sea Cadets
- Merchant Navy Training Board
- MYBA The Worldwide Yachting Association
- National Workboat Association
- Port Skills and Safety
- Royal National Lifeboat Institution
- Royal Navy
- Royal Yachting Association
- Sea Fish Industry Authority

We set up the MSA with three members in 2004, initially as a defensive response to another change in Government skills policy. We found we had much in common, and created a suite of **Maritime Studies Qualifications** (MSQs) to identify the common core of skill in different maritime occupations, too often clouded in the past by concerns about status, or the different business purpose of the vessel. A small vessel in the North Sea, for example, requires very similar navigational or engine room skills regardless of whether it is supplying an oil platform, catching fish or chasing smugglers.

MSQs therefore make it easier for individuals and their employers to build coherent training programmes supporting long-term career development, regardless of which part of the sector they join initially¹. And because MSQs also bring together the requirements of the MCA with those of the economy-wide qualifications frameworks, they have the further advantage of bringing maritime training in line with onshore structures.

Many MSQs also form the core of apprenticeships: for Merchant Navy ratings, rivers and inland waterways (in use on the tidal Thames), ports and sea fishing, for the fast-growing workboat sector and for marina and boatyard operatives.

As our work has expanded, so has our membership and we now have 16 members, covering pretty much all 'the wet side' of the maritime sector.

On the basis of our experience we offer a number of comments under two broad headings.

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¹ Existing education and training programmes remain: MSQs complement them, but do not replace them.

Cast your net wider

We think the maritime sector is perhaps a third bigger than your definition. Restricting your definition to shipping, ports and business services misses significant opportunities for business growth and economic value to the UK. For example:

- the British Marine Federation calculates that the revenue of the leisure, superyacht and small commercial marine industry for 2012-13 was £2.9 billion, of which international trade was £1.08 billion (37%). It estimates the wider economic benefit of the whole of the UK boating industry as £6.2 billion pa;
- the Royal Yachting Association estimates the “total economic contribution” from leisure boating as £2.3bn, and that figure excludes both exports and superyachts;
- the National Workboat Association estimates that a workforce of 7,500 (with a further 1,000 onshore) operates around 1,200 workboats, of which probably 20-30% are operating overseas at any one time, as far afield as the Persian Gulf, Suez, Australia, West Africa and the Caribbean: it’s a significant export business, and its growing;
- the jack-up barge sector, too, is growing, also with significant export earnings;
- the UK fishing fleet brings in over £700m pa – not what it used to be, certainly, but still very substantial;
- more than 10,000 people study for maritime qualifications in the UK every year;
- more than 200,000 complete RYA courses every year in more than 2,200 recognised centres in 20 countries. RYA qualifications topped a recent poll as the most trusted in the world in the yachting sector.

Neither the MSA nor anyone else has done a systematic assessment of the value of the wider maritime sector as we define it, but even from the summary above (and allowing for some double-counting) it is clear that the economic value over and above that of shipping, ports and business services is several billions of pounds.

The significance of the wider sector is bigger than its countable economic value however. The BMF estimates that 3.5 million adults in the UK participated in boating and watersport activities in 2013, and that between us we own more than 1.1 million boats of different shapes and sizes. For a sector concerned about its visibility and its future workforce that is a huge reservoir of interest in things to do with the water. It ought to be possible to tap that reservoir much better than we do now to show people that they can convert their hobby into a career.

And in commercial terms it is of great value that so much of the business of the superyacht sector is conducted in English, and so many of the crew are British.

For our own work in the MSA we have used the broader perspective which our wide membership has given us to create a suite of Maritime Studies Qualifications which recognise the interconnectedness of so many skills. Building qualifications on a unitised basis reduces the cost of re-training to individuals, to their employers and therefore to the economy, as people move from one role to the next. We are grateful to the Maritime and Coastguard Agency for recognising the value of this work and for increasingly making explicit how MSQs align with MCA certification.

Our next step is to promote what we have created, so that everyone involved – policy makers, employers, trade unions, individual professionals, education and training centres, local economic development bodies, careers professionals, and others – knows what exists and how it helps them to do their job better. That promotion will be more effective if others join us in making the case within their own spheres.

The **local significance** of the maritime sector is also important, particularly at a time when there is increasing emphasis on all sides on *local* economic development, and on devolution of budgets to support it. The maritime sector clusters in particular places: Maritime London, the great ports of the Clyde, Forth, Humber, Mersey, Solent, Thames, Tyne and so on, but also many other examples from sea fishing in Fraserburgh and Peterhead, to leisure boating and yachting at the other end of the country, as a particularly strong feature of the South West of England. So alongside the economic value of the sector to the UK as a whole, a full assessment needs to take account of just how important the wider maritime sector is – in a great variety of guises – to particular places.

What are the implications?

- Ministers and other leaders should talk about the wider sector in their speeches, because the more the reality is recognised the more those involved will find ways to drive greater value from the connections;
- Ministers and other leaders should talk about the wider sector when they encourage young people (and those considering career changes) to think about careers in the maritime sector: showing people the broad range will help to draw more people in;
- the Maritime and Coastguard Agency should continue its approach of making explicit the linkages between MSQs and MCA certification, until there is complete coverage of the whole maritime sector;
- the Department for Transport should encourage and support developments at school level, including creation of dedicated qualifications acceptable for Government league tables, because they give many more young people a taste of life afloat, and encouragement to explore the many careers which the wider maritime sector offers them;
- policies and practices designed for the core shipping fleet (such as flagging-in, and encouragement to owners to build their vessels in the UK) should be reassessed and adapted to embrace other parts of the wider fleet, such as workboats²;
- policies and practices designed to encourage local economic growth should be complemented with national guidance on valuing a complex sector like maritime. In some places the sector is significant locally, and valued as such (eg the Humber and Solent Local Economic Partnerships give high priority to ports and wider maritime interests), but that is not universally the case. In others, local activity is more modest and gets insufficient attention, despite its role in the national value chain.

² The National Workboat Association has much more to say on this in its response to the Call for Evidence.

Cherish and promote maritime training

Our foremost maritime training institutions are some of the best in the world, and their worldwide reputation draws in significant numbers of overseas students every year, for a wide range of courses. The proportion is as high as 50% in some cases, and IAMI³, the lead sector body, estimates that as many as 4,000 overseas maritime professionals train in the UK every year (with a high proportion on full-time courses).

Those courses bring immediate value to the host colleges and universities through student fees, which help to sustain a level and range of provision which would not be possible on the basis of UK students alone. For the longer term high levels of international activity support the UK's reputation as a world maritime centre, and they provide a deep pool of goodwill towards the UK which pays dividends throughout the career of foreign-based, UK-trained, maritime professionals.

What are the implications?

- this international work should be protected and developed, and the first step is to quantify it so that the value is clear to all;
- it should be *protected* from the unintended consequences of restrictions on immigration which are applied to overseas students, and from education policies towards colleges and universities which are - wrongly - blind to the damage they do to provision of strategic value. At the least, the Minister for Shipping could write to his colleagues alerting them to the value of international maritime education and what they can do to support and promote it;
- it should be *developed*, so that there is a national strategy to promote the UK's maritime training overseas, and to explore the scope for other maritime sectors to build the international reputation enjoyed by the UK's maritime institutions (largely based on shipping expertise) and by RYA qualifications.

³ International Association of Maritime Institutions