

REGIONAL CLUSTER DEVELOPMENT PROGRAMME

ANNUAL REPORT 2021/22



MERSEY
MARITIME



Maritime
UK

INTRODUCTION

This is the first iteration of an 'Annual Report' into the work of the Maritime UK and Mersey Maritime jointly delivered 'Regional Growth / Regional Cluster Development Programme' activity. This work forms part of one of the five key areas of focus for Maritime UK and is embedded in the priorities and themes identified in the Maritime 2050 Report (2019).

As the UK's longest established and most developed 'Regional Cluster Organisation' (RCO), Mersey Maritime, which represents the maritime industry in the Liverpool City Region and greater North West, is the lead delivery partner in a programme that is substantially supported by the Department for Transport in financial terms. Additional resource is also accessed from other programmes around specific activities and industry/government priorities as needed. The programme is delivered by Chris Shirling-Rooke (CEO, Mersey Maritime) and Simon Eardley (Regional Cluster Development Manager), with input from the whole Maritime UK and Mersey Maritime team around key engagement and in terms of utilising specific expertise.

This report will set out the following key elements, including:

- Background and context to the programme
- Activity and deliverables over the period of the report
- The work of the Maritime UK Regional Council
- A summary of each existing cluster with a basic assessment of their status, key focus within the industry and key work programmes
- Analysis of the economic impact of the maritime industry at a regional level
- A forward look to the wider and future work of the programme
- Key contact details and geographic coverage for each RCO.

The period of this report covers January 2021 to July 2022. It is intended to publish it on an annual basis, soon after July each year, covering a whole 12-month period in the future.

BACKGROUND

Maritime UK and Mersey Maritime, together with its partners, is responsible for the development and roll-out of an ambitious 'Regional Cluster Development Programme', an initiative embedded in the priorities set out in 'Maritime 2050: Navigating the Future.' Maritime 2050 is the first long-term strategy for the UK's maritime sector and was launched by government in 2019. This vision recognises the maritime sector as being of significant importance to Britain's future success, with regions and their individual unique specialist areas of focus, critical to driving the industry forward in the 21st century.

THE MARITIME 2050 VISION

"The UK will retain a diversity of maritime clusters that excel in their respective specialisations. London will remain the leading professional services centre in the world, the leading maritime centre in Europe, and one of the top maritime centres globally.

The UK will retain a highly attractive destination for maritime industry leaders and staff to work and live. UK-based maritime schools, colleges and universities will continue providing top-quality programmes and qualifications, providing technologically advanced skills that will be required in the maritime era.

The UK will maximise the benefit of its leading clusters across the country, retaining London as the home for maritime business and the global home of the IMO. The UK maritime sector will be consistently recognised for the ease with which business is done and the way in which government and industry work as one to promote the offer."

In short, the vision is for:

- Government and industry to work together to maintain and enhance the attractiveness of the UK's regional maritime clusters
- Government to support, enhance and promote the strength of all regional clusters in the UK, and their importance to the economy
- Where appropriate, the strengthening of ties between government, industry and academia to build on existing cluster success and identify new opportunities.

A GOVERNMENT BACKED PROGRAMME

The concept of a Regional Cluster Development Programme was developed as a direct response to Maritime 2050 and the emphasis it places on the importance of regions and regional growth to the future prosperity of the maritime industry at a national level. Mersey Maritime and Maritime UK worked in partnership to place a proposal before the Department for Transport to bring about the practical delivery of 'on the ground' programme activity. This was formulated in 2019 and led to the recruitment of professional support to deliver engagement and provide secretariat support to the work of the Maritime UK Regional Council. This was in embryonic form at that time as a body to bring together representatives of existing and emerging centres of RCO activity around the coast (see summary of its work later in this document).

Initially the programme was funded for one year between the Department for Transport and Mersey Maritime. Progress in delivery saw a three-year, match-funded proposition, agreed and implemented from 2021. The initial and core emphasis of the work seeks to build on existing cluster success and identify new opportunities and strengthen the ties between government, industry and academia at both a regional and national level. As noted already, Mersey Maritime is the national lead for this project and is recognised as the preferred best practice model for its rollout in other places.

WHAT IS A 'REGIONAL CLUSTER ORGANISATION'?

- A hybrid of trade body, chamber of commerce and lobbying 'organisations'
- Loosely based on established cluster models on the continent and further afield
- RCOs support and intervene in single industry / associated sub-sectors
- Focus on creating jobs and growth
- Championing a particular region leads to direct correlation between RCO, increased productivity and innovation – growth and job generation across all sizes of business within the industry.

WHAT DO REGIONAL CLUSTER ORGANISATIONS DO?

Maritime 2050 sets out that their primary role is to create regional growth and in turn support national aims and objectives. To achieve this they focus on:

- Increasing the profile of the region as a champion for the maritime industry
- Providing the region with a critical pathway of communication and intelligence to government and key industry stakeholders
- Fostering intra-regional collaboration, creating the framework for collaboration and aligning activity across a given geographic area
- Driving export and foreign direct investment activity and opportunities
- Acting as a conduit between industry, education and government
- Facilitating networking and mentoring programmes to help create an ecosystem that is vital for growth
- Encouraging knowledge and best practice sharing at a regional level and in turn nationally, even internationally
- Delivering wider national programmes and initiatives at a regional level such as the MUK Careers Campaign and Diversity in Maritime.



CURRENT NETWORK OF REGIONAL CLUSTER ORGANISATIONS

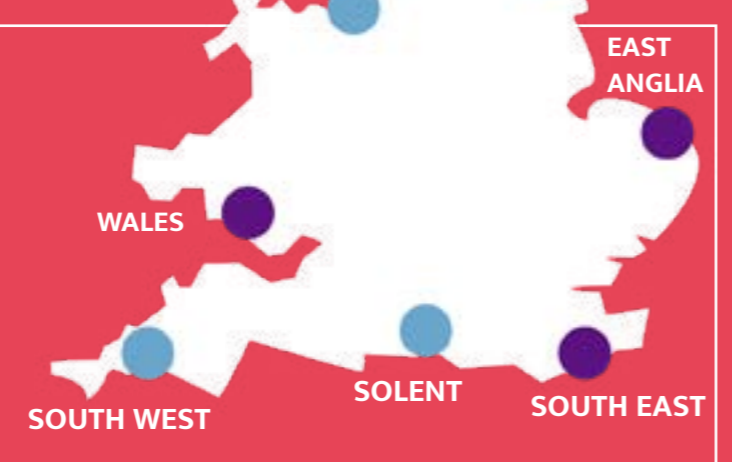
FUNCTIONAL RCOs AT DIFFERENT STAGES OF DEVELOPMENT

- Belfast Maritime Consortium
- Humber Marine & Renewables
- Maritime UK Solent
- Maritime UK South West
- Mersey Maritime
- Scottish Maritime Cluster



ACTIVELY WORKING TO CREATE RCOs IN:

- East Anglia
- North East of England
- South East of England
- Wales





REGION / RCO	RAG STATUS (see note below)	MUK STATUS	KEY FOCUS WITHIN THE INDUSTRY	KEY WORK PROGRAMMES
Belfast Maritime Consortium		Full regional member	<ul style="list-style-type: none"> Innovation in green technology Shipbuilding Offshore wind 	<ul style="list-style-type: none"> Strength in Places project led by Artemis Technologies (zero emission ferries) Clean Maritime Demonstration Competition funded projects (rounds 1 and 2)
Maritime UK Solent		Full regional member	<ul style="list-style-type: none"> MUK Solent has identified the following priorities: <ul style="list-style-type: none"> People Innovation Environment The Solent maritime cluster - uniquely - benefits from excellence across the spectrum of maritime, including: <ul style="list-style-type: none"> Ports and Shipping Maritime Defence Autonomy Robotics Training Academia and Research Leisure Marine Heritage and Tourism Regulatory Classification Specific world-leading maritime strengths in the Solent with significant market potential are: <ul style="list-style-type: none"> Autonomous Maritime Connected Maritime Clean Maritime 	<ul style="list-style-type: none"> Established a strong board of senior industry leaders Incorporated MUK Solent Limited Published first business plan. Secured capacity funding for three years Developing a revenue generation plan to be self-sustaining Appointed new resource and entered into SLA with accountable body Commissioned work to identify the key global maritime innovation strengths of the Solent with greatest market potential Commissioned economic analysis of the impact of the Solent maritime sector - £7.7bn GVA and 200k jobs Establishing a MUK Solent website Maritime careers activity, inc. awareness raising / careers fairs Developing a Solent Maritime Innovation Hub Hosting the inaugural MUK Solent Awards to champion the sector A partner of the new South Coast Institute of Technology Delivering the maritime skills components of the Solent Local Skills Improvement Plan Facilitating engagement in CMDC activity to lead decarbonisation within the cluster Corporate development of new cluster in operation Hosted monthly networking meetings Signed a collaboration agreement with Turku Business Region in Finland
Maritime UK South West (inc. Cornwall Marine Network)		Full regional member	<ul style="list-style-type: none"> Offshore renewable (inc. floating offshore wind) Autonomy, maritime cyber and digital ocean technology Skills/training/ apprenticeships Environmental / digital technology Advanced engineering Marine Defence Concentration of harbours and ports (Falmouth, Plymouth, Poole, Portland) Clean maritime 	<ul style="list-style-type: none"> Green skills / careers and skills needs, particularly amongst SMEs Plymouth & South Devon Freeport Global centre for marine research and innovation Business development and support activities Ocean Futures Programme
Mersey Maritime		Full regional member	<ul style="list-style-type: none"> Port operations (UK's most significant west facing port) Shipbuilding including (Cammell Laird and specialist SMEs) Maritime professional services Engineering Offshore wind 	<ul style="list-style-type: none"> Maritime Knowledge Hub project LCR Freeport Innovation project support and delivery (CMDC and other) Collaborative ecosystem activity (networking events and industry specific forums) Thought leadership (annual profile conference; Mersey Maritime Exchange) Mersey Maritime Industry Awards Port City Innovation Hub

REGION / RCO	RAG STATUS (see note below)	MUK STATUS	KEY FOCUS WITHIN THE INDUSTRY	KEY WORK PROGRAMMES
Scottish Maritime Cluster		Regional Council member only	Ship management; <ul style="list-style-type: none"> • Naval ship design, build and support; • Offshore energy operations; • Nautical training and personnel capability; • Maritime education (universities and academics); • Professional support services. 	<ul style="list-style-type: none"> • Cluster members have identified five key strategic areas as their focus – commercial shipping, naval/military contracts, maritime business support services, maritime legislation and education and training • Leadership base for Maritime Research & Innovation UK • National Shipbuilding Strategy
Humber Marine and Renewables (formerly Team Humber Marine Alliance)		Regional Council member only	<ul style="list-style-type: none"> • Offshore wind • Offshore oil and gas • Ports and commercial shipping • Marine engineering • Skills 	<ul style="list-style-type: none"> • Future skills development in marine and renewables: identify skills gaps, future skills requirements and where possible build local capacity. Focus on providing pathways for careers in marine/offshore industries including wind crew, deckhands, skippers, pilots, O&M technicians, stevedores etc. • Development of the wider Humber industrial area from a maritime perspective (as a key component): <ul style="list-style-type: none"> • Infrastructure: deliver the infrastructure required to maximise the impact of the Humber ports and increase their contribution to the Humber and UK economies • Innovation: capitalise on new technologies to ensure Humber ports remain at the leading edge of innovation within the sector • People: prepare the workforce for the ports and logistics sector of the future, ensuring alignment with other skills activity across the Humber • Business environment: create business environment which supports intensification and diversification of activity around the ports • Place: develop the ‘Humber Maritime Supercluster’ collaborative partnership amongst the key businesses and stakeholders within the Humber
East Anglia		Regional Council invitee	TBC and agreed as development work is taken forward here	<ul style="list-style-type: none"> • Felixstowe and Harwich Freeport
South East		Regional Council invitee	TBC and agreed as development work is taken forward here	<ul style="list-style-type: none"> • Thames Freeport • Felixstowe and Harwich Freeport • Dover Straits Channel operations

REGION / RCO	RAG STATUS (see note below)	MUK STATUS	KEY FOCUS WITHIN THE INDUSTRY	KEY WORK PROGRAMMES
North East – Tyne		Regional Council invitee	TBC and agreed as development work is taken forward here	<ul style="list-style-type: none"> Maritime 2050 Innovation Hub
North East – Tees Valley		Regional Council invitee	TBC and agreed as development work is taken forward here	<ul style="list-style-type: none"> Teeside Freeport Skills / training / apprenticeships (NE School of Shipping)



‘RAG’ STATUS EXPLANATORY NOTE:

‘RAG’ STATUS	DEFINITION OF ‘RAG’ STATUS	BASIC EXPLANATION (EXAMPLES TO SHOW EVIDENCE)
	Established	Established; Governance fully in place; Business Plan formulated; Activity undertaken, MUK regional member
	In development	Established but might be in transition; Governance in place or being developed; Activity plan in place or being developed; Regional Council participant only
	Early development	Embryonic establishment; Governance not determined; Limited activity underway or ad hoc; Regional Council participant only (but present)



MARITIME UK REGIONAL COUNCIL

The Maritime UK Regional Council exists to bring together maritime RCOs from across the UK. In doing so, these RCOs seek to share best practice, collaborate and support the creation of new cluster organisations. Maritime UK started its journey by bringing together national trade associations to collaborate within the National Council. The Regional Council is, in effect, a replication of this work but with a unique regional focus to support the collective aim of driving growth in the UK maritime sector and strengthening international competitiveness.

Full Maritime UK members within regions sit on the Regional Council as well as the National Council. An inclusive approach is adopted to the wider group of stakeholders who are engaged with Regional Council meetings, with the group open to representatives of organisations with whom the Regional Cluster Development Team are working to help drive the development of new RCOs. The Regional Council can make recommendations to the National Council but it is not a decision-making body as such. It is chaired by Paul Wickes (Cornwall Marine Network/Maritime UK South West) who is supported by David Tyler (Belfast Maritime Consortium) as Deputy Chair.

The Regional Council meets on a quarterly basis and since the start of 2021 has met as follows:

- 17 March 2021 – online owing to Covid-19 restrictions
- 01 July 2021 – hosted by Mersey Maritime / hybrid meeting
- 14 September 2021 – hosted during London International Shipping week / hybrid meeting
- 14 December 2021 – online owing to Covid-19 restrictions
- 10 March 2022 – hosted by the Scottish Maritime Cluster / hybrid meeting
- 07 July 2022 – hosted by BMT Global / hybrid meeting

Engagement with a range of internal and external stakeholders is a key part of the work of the Regional Council, in addition to the opportunity for Maritime UK programme updates and other activity reports. A standing update agenda item for the Department for Transport is included. A summary is provided here of those with whom the group have engaged over the course of the life of this annual report:

MEETING	KEY EXTERNAL ENGAGEMENT
March 2021	<ul style="list-style-type: none"> • Workboat Association • LGA Coastal SIG
July 2021	<ul style="list-style-type: none"> • Beyond 2050 (political stakeholder engagement best practice) • Woodrow Communications (maximising regional media coverage)
September 2021	<ul style="list-style-type: none"> • Ocean Futures Project (MUK SW) • Maritime Skills Commission
December 2021	<ul style="list-style-type: none"> • Department for Business, Energy & Industrial Strategy, Advanced Manufacturing & Services (Marine/Defence) • Department for International Trade • Mersey Maritime (commercial best practice workshop)
March 2022	<ul style="list-style-type: none"> • Maritime Skills Commission • BEIS – Home Shipping Credit Guarantee Scheme • Royal Navy – regional command
July 2022	<ul style="list-style-type: none"> • Connected Places Catapult • Casper Shipping / North East School of Shipping

Action notes are issued following each meeting of the Regional Council and reported on at the quarterly meeting of the National Council.

REGIONAL ACTIVITY ROUNDUP REPORTS

One of the most important activities of the Regional Council is to give the opportunity for inter-region best practice sharing and collaboration through experience and activity discussions. Since July 2021 these reports have been published on the Maritime UK website, circulated to internal Maritime UK stakeholders and issued to colleagues in Government. The reports from July, September, December 2021 and March and July 2022 can be accessed on the [Maritime UK website](#).

ENGAGEMENT PROJECTS

CLEAN MARITIME DEMONSTRATION COMPETITION (ROUND 1)

Following the announcement of HM Government's £23.2 million funding to support the decarbonisation of the maritime industry in the form of a 'Clean Maritime Demonstration Competition' (CMDC) in 2020, regional cluster organisations were asked to facilitate and host dedicated briefing sessions for industry prior to the formal launch of the CMDC Round 1 in March 2021. The funding was intended for UK innovators to support the design and development of zero emission vessel technologies and greener ports. Following an independent assessment, 55 projects won the competition and, supported by private consortia comprising 208 partners from around the UK, these projects were announced at London International Shipping Week 2021.

Regional cluster organisation led briefing sessions were held as follows:

- 27 January 2021: Mersey Maritime (North West); South East; Solent; South West
- 28 January 2021: North East (Port of Tyne hosted); Scotland; Northern Ireland; East Anglia.

A number of projects involved businesses associated with regional cluster organisations, full details of which can be found [HERE](#)

It is anticipated that regions will be asked to once again arrange similar events for future rounds of the CMDC, likely in the Autumn 2022, but with a greater emphasis on networking and consortia building in collaboration with the Department for Transport, Innovate UK and Innovate UK-KTN.

LONDON INTERNATIONAL SHIPPING WEEK 2021

Regions engaged with a range of activity across London International Shipping Week 2021, including a dedicated 'Coastal Powerhouse Day' on Thursday 16 September 2021. In collaboration with the LGA Coastal Special Interest Group, the British Ports Association, the UK Major Ports Group and our network of RCOs around the UK, the event saw the launch of a new Coastal Powerhouse Manifesto.

The event included contributions from Amanda Solloway MP, then Minister for Research and Innovation (BEIS), Luke Hall MP, then Minister for Regional Growth & Local Government (former MHCLG) and Mike Kane MP, Shadow Maritime Minister, in addition to panel discussions with RCO representatives.

- Read more about the launch of the manifesto [HERE](#)
- A recording of the event is available [HERE](#)

Promotional video collateral was produced in advance of LISW for all regions of the UK, regardless of their membership of Maritime UK. Ten short films were published during the Coastal Powerhouse Day and are available to view [HERE](#)



COASTAL POWERHOUSE MANIFESTO

The Coastal Powerhouse Manifesto referenced above was developed in collaboration with a range of partners and input sought from all RCOs via the Regional Council. Its themes and emphasis fit firmly within the work programmes and prioritisation of all regions, being solely focused on improving the prosperity of the coastal areas of the United Kingdom. Key pillars of the manifesto include:

- Delivering net zero and nature recovery in coastal areas through investment in energy networks and infrastructure; accelerating the net zero transition and nature recovery as well as emissions reduction
- Levelling up and job creation all around the UK coast through a fresh look at planning and development rules; growing the local talent pipeline, and capturing the green dividend of offshore energy growth
- Strengthening the UK's main gateways for trade through better transport connectivity for coastal regions and 'smart' / digital supply chain application funding.

RCOs understand, by virtue of their geographic sphere of activity, the challenges faced by coastal communities and the imperative of championing this key political agenda and priority. Coastal communities are known on average to have higher scores on multiple deprivation indices than the UK average, they are disproportionately in the lower income distribution quintiles in England and see higher levels of unemployment. Research suggests that coastal communities are amongst the hardest hit by the economic impacts of Covid-19 coupled with the fact that they are on the front line of adverse impacts of climate change and face challenges around biodiversity and habitats. These challenges can be seen all around the coast of the UK, and are not confined to particular regions or areas. As we approach the next general election, these themes will be picked up in the formulation of Maritime UK's 'Programme for Government' and RCOs asked to advocate the key messages to their own political stakeholders.

A copy of the manifesto can be downloaded [HERE](#)

ENGAGEMENT WITH GOVERNMENT DEPARTMENTS OTHER THAN THE DEPARTMENT FOR TRANSPORT

The Secretariat to the programme facilitated a series of engagement sessions with representatives of the Advanced Manufacturing and Services (Defence and Marine) division of the Department for Business, Energy and Industrial Strategy in early 2022. These sessions focused on helping BEIS consider how they might align their advocacy of maritime related projects within government on a regional basis. BEIS officials were looking to add value to projects, support funding bids where possible and understand regional specialisms more specifically. Sessions were held as follows:

- Scottish Maritime Cluster, 08 February 2022
- Mersey Maritime, 08 February 2022
- South East (Simon Barnes, University of Kent), 10 February 2022
- Humber, 10 March 2022
- North East (Port of Tyne), 10 March 2022
- North East (Tees Valley), 04 May 2022.

It is expected that similar sessions to those arranged for BEIS will be held between regions and the Department for International Trade in early 2023.

A 'Special Regional Council' meeting was held to receive a briefing from the Department for Levelling-Up, Housing and Communities on 01 June 2022 around the opportunities presented for maritime RCOs and regions generally in relation to the UK Shared Prosperity Fund and the Levelling-Up Fund. Follow up briefing materials were issued to help regions engage with relevant local/regional lead delivery bodies.

It is intended that a dedicated workshop around maximising funding opportunities such as these will be offered in early 2023.

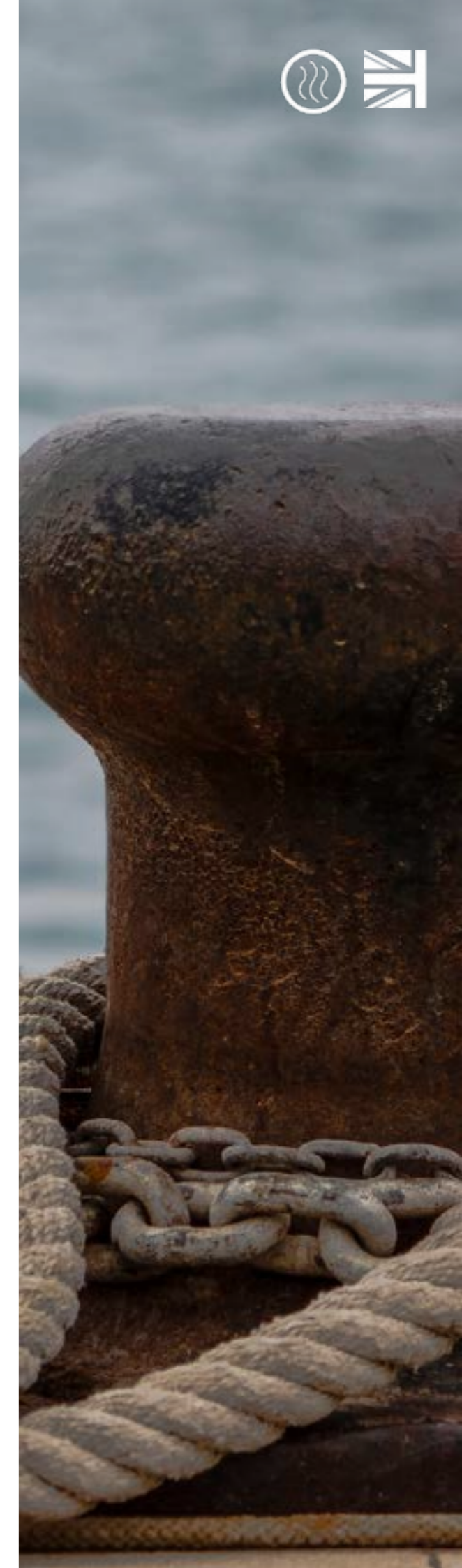
It should be noted that this wider engagement activity builds on previous work prior to the period covered by this report, such as with HM Treasury at the onset of the development of the Freeport policy and proposition. HMT briefed the Regional Council in February 2020 around that work.

REGIONAL CLUSTER DEVELOPMENT PLANS

In January 2021 it was agreed that, as part of regional cluster development activity and support offer for regions, a series of 'Regional Cluster Development Plans' (RCDP) would be formulated for each that is a full member of Maritime UK. A pared back version of the engagement meeting was also be offered to each RCO that we have a relationship with but aren't full Maritime UK members. Dedicated meetings were held and covered the following areas of discussion:

- Introduction and purpose of the RCDP: aims and objectives
- RCO report and overview of recent activity
- RCO and Maritime UK team to agree future organisational objectives
- RCO and Maritime UK team discuss a grid of possible activity formulated against each of the five national priority themes (a grid was circulated in advance and the Regional Cluster Programme Manager captured key objectives and agreed engagement during the course of the meeting).

The planning grid listed a number of projects that each RCO was asked to consider and agree as objectives for their next period of activity. Examples of suggested engagement from each priority theme are listed below. These discussions were framed in terms of an 'Industry ask', i.e. from Maritime UK or other partners and an 'Industry offer', i.e. a suggested project that Maritime UK or other partners would help to deliver, working with the RCO.



PEOPLE THEME EXAMPLE

OPPORTUNITY / ACTIVITY	INDUSTRY (MUK/MEMBERS) ASK OF REGION	INDUSTRY (MUK/MEMBERS) OFFER TO REGION
<p>Careers and careers promotion</p> <p>NB – a separate and dedicated regional careers outlook plan has been formulated which sits alongside this ask/offer grid in respect of this area of focus and should be read in conjunction with this document.</p>	<ul style="list-style-type: none"> Become a 'Campaign Partner' / promote concept to and identity potential member careers partners Promote MUK careers activity amongst membership networks Host an annual MUK careers promotion event either as an RCO or in partnership with relevant local stakeholders 	<ul style="list-style-type: none"> Campaign partner toolkit and access to other resources (digital and printed) Access to MUK careers campaign events (could be an 'annual' virtual fair / periodic physical event) Stakeholder engagement with careers partners locally (professionals, schools/colleges, others) – for initiative delivery Careers promotion video – facilitate and deliver Dedicated Programme Manager support to develop and implement bespoke regional maritime careers activity

INNOVATION PRIORITY THEME EXAMPLE

OPPORTUNITY / ACTIVITY	INDUSTRY (MUK/MEMBERS) ASK OF REGION	INDUSTRY (MUK/MEMBERS) OFFER TO REGION
Database of innovation projects	<ul style="list-style-type: none"> Populate and maintain grid of innovation projects at a regional level 	<ul style="list-style-type: none"> MUK promotion of projects to government and amongst national member networks
Decarbonisation / Net Zero	<ul style="list-style-type: none"> Host a 'Road to Net Zero Carbon' Workshop at a regional level in the run up to COP 26 in 2021 with a focus on regional innovation projects 	<ul style="list-style-type: none"> MUK practical support to host, engage stakeholders, promote event MUK PR support post event MUK political advocacy support post event

ENVIRONMENT PRIORITY THEME EXAMPLE

OPPORTUNITY / ACTIVITY	INDUSTRY (MUK/MEMBERS) ASK OF REGION	INDUSTRY (MUK/MEMBERS) OFFER TO REGION
Comprehensive Spending Review – 2020	<ul style="list-style-type: none"> Promote CSR priorities across members and key stakeholders Maintain a pipeline of projects and opportunities for investment 	<ul style="list-style-type: none"> Toolkit resources, template materials, stakeholder engagement Promotion and facilitation of projects within government and amongst national bodies Political advocacy bespoke to regions (regional/national level)

Engagement around these RCDPs took place as follows, and follow-up annotated plans were issued to each region:

- Belfast Maritime Consortium: 10.02.21 (full MUK member)
- Scottish Maritime Cluster: 16.02.21 (Regional Council member)
- Maritime UK South West: 23.02.21 (full MUK member)
- Mersey Maritime: 24.03.21 (full MUK member)
- Maritime UK Solent: 02.09.21 (full MUK member).

The impact of Covid-19 was felt in terms of the practical implementation and delivery of many of the identified projects within these plans. This has necessitated a review of the effectiveness of this approach and whether more realistic plans, focused on core and key deliverables across the priority themes (one per each area) might be more sensible. These projects would be agreed formally in a simple document, Maritime UK programme staff allocated to assist with delivery and timeframes identified. A bi-annual review meeting would be scheduled in addition to all the other engagement activities that take place with each region.



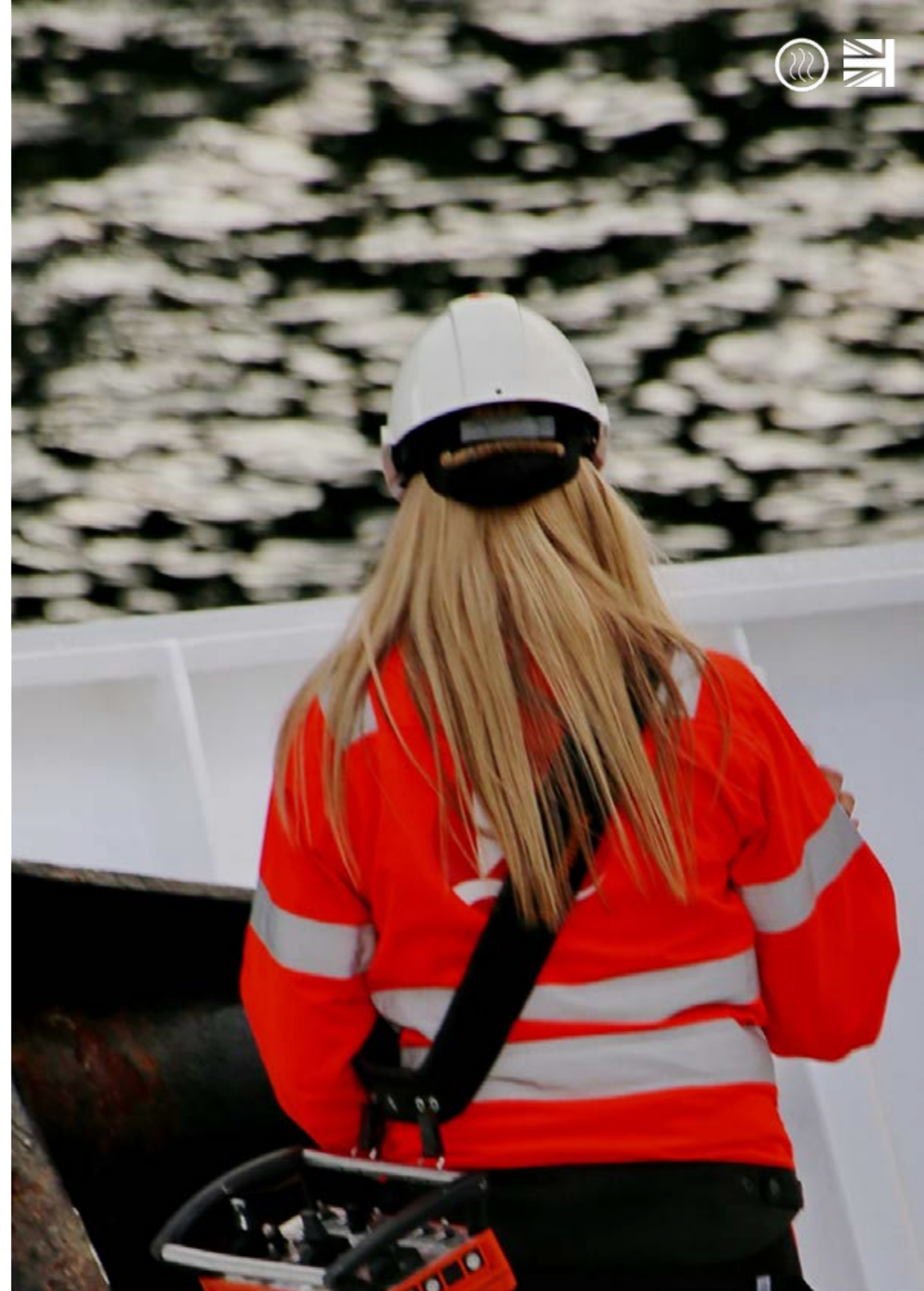
CASE STUDY: MARITIME CAREERS AND OUTREACH PROGRAMME ENGAGEMENT

The Maritime UK Programme Manager with responsibility for the Maritime Careers programme engaged with RCOs who are full members of Maritime UK across the period of this report to:

- Develop individual regional careers’ activity plans and on the ground activity
- Deliver Maritime Careers promotional videos for each RCO to be used both regionally and nationally in the promotion of the positive benefits of pursuing a career in the maritime industry and to demonstrate the range of career options the industry offers. These videos can be accessed here:
 - [NORTH WEST \(MERSEY MARITIME\)](#)
 - [SOLENT \(MARITIME UK SOLENT\)](#)
 - [SOUTH WEST \(MARITIME UK SOUTH WEST\)](#)
 - [NORTHERN IRELAND \(BELFAST MARITIME CONSORTIUM\)](#)
- Expand and promote the range of Maritime Industry Ambassadors available to visit education institutions to promote the sector and careers within it
- Identify external stakeholders, such as local authority-based careers professionals, to join and actively participate in maritime focused professional development activity
- Deliver events such as: a professional maritime presence at careers and skills fairs; engagement activity on an ad hoc basis and at specific key activities such as LISW or Maritime UK Week (MUK Week being an opportunity for port visits, museum visits etc at a regional level) and during times of dedicated careers activity such as National Careers Week, National Apprenticeship Week (amongst others).

The challenges presented by the Covid-19 pandemic severely restricted opportunities over the life of this report for many in-person activities, such as taking maritime careers and outreach space at careers/ jobs/skills fairs. However, one such event that did take place in 2022 was the Liverpool City Region Skills Show (01/02 March 2022 at the Exhibition Centre, Liverpool). Some 3,000+ young people were present at the event which was supported by Maritime UK, Mersey Maritime, members of Mersey Maritime drawn from across the industry and Maritime UK members such as the British Ports Association.

The extent of RCO engagement with the Careers and Outreach programme can be demonstrated by the number of Industry Ambassadors at a regional level. A breakdown is provided here:



REGIONAL ECONOMIC IMPACT

By nature, RCOs support the maritime ecosystem in their individual region and unless their programme of work specifically involves direct job creation activity, it is challenging to quantify their overall impact on a given area in terms of actual jobs created. However, as Maritime 2050 states, there is known to be a direct correlation between RCO activity when a specific region is championed and the conditions for growth are present. Productivity and innovation are key, with growth and job generation across all sizes of business within the industry shown. An appendix to this report summarises the latest (and most recent previous) economic impact analysis of the maritime industry in all the nations and regions of the United Kingdom. This demonstrates an upward trajectory and growing industry in all instances. RCOs will undoubtedly have had an impact on helping to create the ecosystem and environment needed for growth to happen.

In some instances it is also possible to cite where direct involvement of RCOs in their local maritime economy does result in specific and demonstrable growth. Two examples are worth citing in this regard.

CASE STUDY 1: Cornwall Marine Network (part of Maritime UK South West). Achievements to date include (and don't take into account direct support given to the sector during the Covid-19 pandemic where the RCO was known to have intervened on behalf of at least 400 businesses):

- Grown membership to 351 subscribing marine businesses
- The creation of 4,450 new marine jobs (including 1,520 apprenticeships in local small businesses)
- Supported 890 unemployed people to gain jobs
- Engaged 36,000 young people in marine vocational training / careers advice using Marine Ambassadors from 105 member businesses
- Directly added £500 million GVA to Cornwall's economy as a result of competitively winning £40 million of project funds
- Every £1 won by CMN and spent on services to marine businesses produces £12.50 added value to Cornwall's economy
- Generated more than £40 million of private marine sector investment in skills
- Improved the skills, via dedicated programmes and initiatives, of more than 8,500 marine employees (more than half of the local workforce of 16,052 employees)
- Worked in collaboration with 72 different European project partners to exchange best practice
- Over the last 17 years, on average, the CMN team create a new job somewhere in Cornwall EVERY working day, and the
- CMN staff team has grown to 52, making it the largest privately owned not-for-profit maritime cluster in the UK and Europe.

CASE STUDY 2: Belfast Maritime Consortium (Artemis Technologies as lead partner). The BMC secured £33 million of Government UK Research and Innovation funding through the Strength in Places Fund to build zero emissions ferries. A key component of the overall bid was an understanding that this work would see the development of an RCO for further collaboration. This focused on recognition of the benefits of collaboration between business, academia and government at all levels. The grant was unlocked and is part of an overall £60 million project that has seen an initial 125 research and development jobs created and is predicted to create some 1,000 in the region over a 10-year period. A key element of this work is also focused on support for apprenticeships in Northern Ireland. In December 2021 it was reported that the first group of apprentices had commenced a unique apprenticeship with Artemis Technologies and Belfast Met College that will see them work on the programme to develop green vessels of the future. The students participate in an Advanced Manufacturing Apprenticeship scheme, combining classroom tuition with hands-on experience at Artemis Technologies, the lead partner in the Belfast Maritime Consortium.

Activity hasn't just been limited to these two examples. In the North West, Mersey Maritime is one of the lead partners in the delivery of the next generation of the Maritime Knowledge Hub project which is based at the Wirral Waters regeneration scheme in Birkenhead. This £25 million regeneration scheme will create a centre of excellence around maritime skills, innovation, business support and incubation. It is estimated to create circa. 4,000 jobs on completion and over the initial period of its life.

RCOs have also played a leading role in the development of business cases and overall planning for Freeports within England, with several sitting on the steering groups and boards that have driven this activity, including Maritime UK Solent. Although the impact of the introduction of Freeports cannot at present be quantified, it is expected that they will result in many thousands of new jobs in the areas where they will be operational. The Solent Freeport, for example, is predicted to create 32,000 jobs; the Humber Freeport 7,000 jobs and the Teeside Freeport 18,000 jobs. RCOs have been supported in their work to promote and drive projects such as this.

CASE STUDY 3: Wider Government priorities: Maritime UK Solent and 'Levelling Up'

The importance of RCOs to the wider priorities of HM Government is frequently highlighted, not just within the context of Maritime 2050, but also as a key component of the ambitions to 'level up' the UK. The government's 'Levelling Up the United Kingdom' White Paper, published in February 2022, gives prominence to the importance of geographic and economic clustering and the role of private sector industry led partnerships, noting that 'Clusters are ecosystems in which people meet and exchange ideas, goods and services as part of common supply chains' (p39). The Solent is highlighted as one of 20 geographical illustrations of sectoral clusters and strengths for its port and maritime specialisms, importance to trade and the presence of three universities (Southampton, Portsmouth and Solent) (p41). The publication recognises two significant initiatives driven by Solent LEP, in collaboration with partners, which aim to stimulate the region's economic prosperity and benefit local communities:

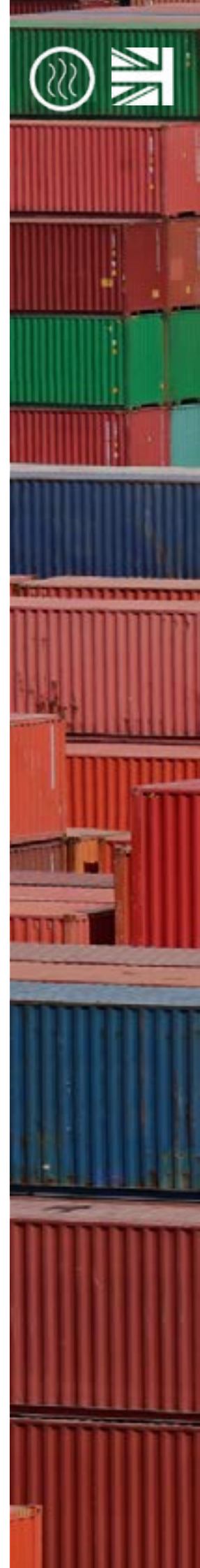
- Maritime UK Solent. An industry-led regional body which brings together the Solent's maritime strengths and champions the region on a global stage, showcased as the South East example of a private sector initiative
- The emerging Solent Freeport. Highlighted as a key driver in the region to unlock investment, create new jobs and help attract new businesses in high growth sectors.

The White Paper highlights the valuable strengths of Local Enterprise Partnerships and their engagement with collaborative initiatives that have the ability to champion a region and deliver on wider national ambitions such as levelling up. LEP's are uniquely placed to convene the private sector with local authority, academic, education and community and voluntary sector partners.

In the context of an illustrative list of some of the potentially transformative private sector partnerships currently underway, Maritime UK Solent, is further highlighted as follows:

"Maritime UK Solent (South East England) is an industry-led regional body that brings together the Solent's maritime strengths and champions the region as a globally significant maritime cluster, built upon the region's natural assets – 340 miles of coastline, three major international gateway ports, an emerging freeport, world-leading training institutions and a rich maritime heritage."

(Levelling Up White Paper, February 2022, p148 - can be viewed [HERE](#))



MISCELLANEOUS ACTIVITIES

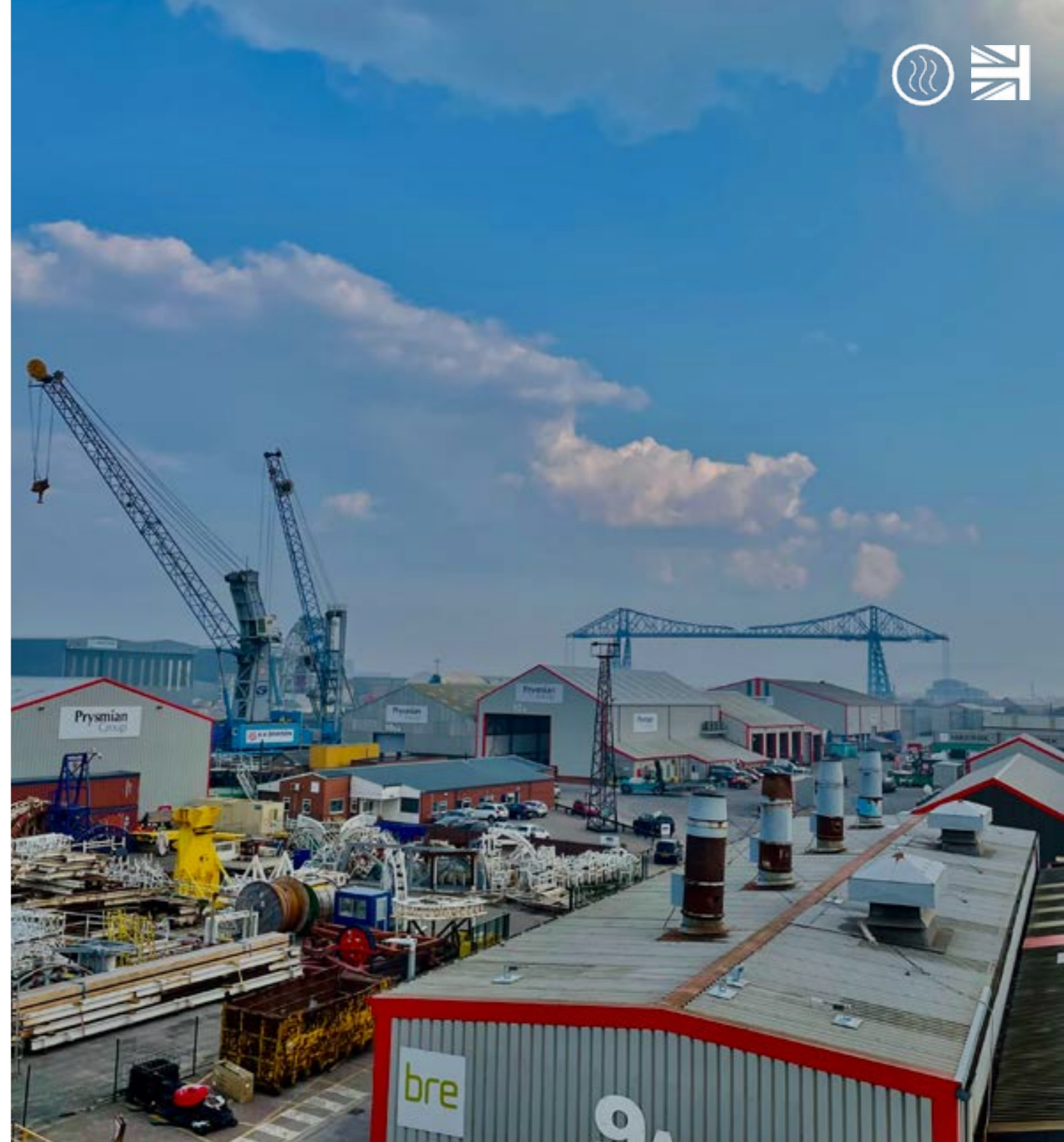
The activity of RCOs identified in this report includes a number of ad hoc or theme specific engagement. This has included the following miscellaneous activities:

- The prioritisation of decarbonisation and the imperative of a 'green economy' is a theme across government and picked up by industry in its own activities. In the run up to COP26 in Glasgow, a number of RCOs held 'Road to Net Zero' events which sought to showcase regional best practice and exemplar work on clean maritime projects. Such events were held in: Maritime UK South West (November 2020), Mersey Maritime (February 2021) and Maritime UK Solent (June 2021). Invitations to these events were extended to MPs, local/regional government elected members and officials. A regional MP 'hosted' each event and up to ten individual businesses gave short summary / elevator pitches around their activities in this area. These themes were then picked up at COP26 itself with a range of events and activities focused on the 'COP26 International Maritime Hub' hosted during the period of the UN conference by Glasgow City College
- Briefing the Department for Transport 'Learning Week' around the Regional Cluster Development Programme (01/02/22)
- Participation in a Maritime UK 'Build Back Better' Regional Growth webinar (22/02/22)
- Promotional work around industry priorities to influence pre-Budget activity and two dedicated campaigns over the period of this report on the Comprehensive / Standard Spending Reviews
- Support for the development of the Freeports Innovation Network

A FORWARD LOOK

This programme of work continues to evolve and inevitably requires a degree of pace and flexibility in terms of its focus and direction. It must remain agile enough to respond to opportunities as they emerge, whilst also remaining focused on its core work stream. Identified key priorities for the period from July 2022 include:

- Scheduled Regional Council meetings on a quarterly basis, held around the coastal regions of the UK in an in-person format
- Issuing comprehensive 'Regional Roundup' reports following each Regional Council meeting to key stakeholders, including HM Government, to aid the profile of RCOs and their work
- Support for Department for Transport colleagues in undertaking a series of dedicated regional engagement days to better understand activity on the ground in each area
- Continue to deliver a quarterly update report on 'Regional Growth Programme' activity to Department for Transport officials
- Refresh and deliver an alternative 'Regional Cluster Development Plan' (RCDP) for each full regional member of Maritime UK with focused and realistic deliverables which can be monitored against specific timelines and KPIs
- Ongoing support for existing RCOs who are full members of Maritime UK to develop their activities at a regional level and in terms of engagement with national programmes and priorities
- Ongoing activity to develop formal RCOs, ideally who become full members of Maritime UK, in areas of identified priority (such as the South East, North East and Wales)
- Facilitating engagement with RCOs on key maritime priorities within government, such as future rounds of the Clean Maritime Demonstration Competition (Autumn 2022)
- Developing and delivering further a range of dedicated workshop sessions on themes and priorities identified by RCOs, such as RCO marketing and promotions; RCO engagement to maximise external funding opportunities such as via the UK Shared Prosperity Fund and/or the Levelling-Up Fund (etc)
- Refresh and republish best practice materials and a regional cluster development manual in the first quarter of 2023



- Deliver region-by-region engagement with other national programmes on an agreed basis, possibly incorporated into an overall RCDP, specifically focused on core Maritime UK programme activities: Careers and Outreach, Skills, Diversity in Maritime etc.

The future of this programme activity is now under consideration and in the next time period a proposal for ongoing support from the Department for Transport will be submitted. This will follow a rigorous review of the progress achieved to date, further assessment of the status of regional cluster development around each RCO, key areas of focus for activity in the future and support requirements. It is expected that this work will commence in Q4 2022 and support the programme activity from 2024 onwards.

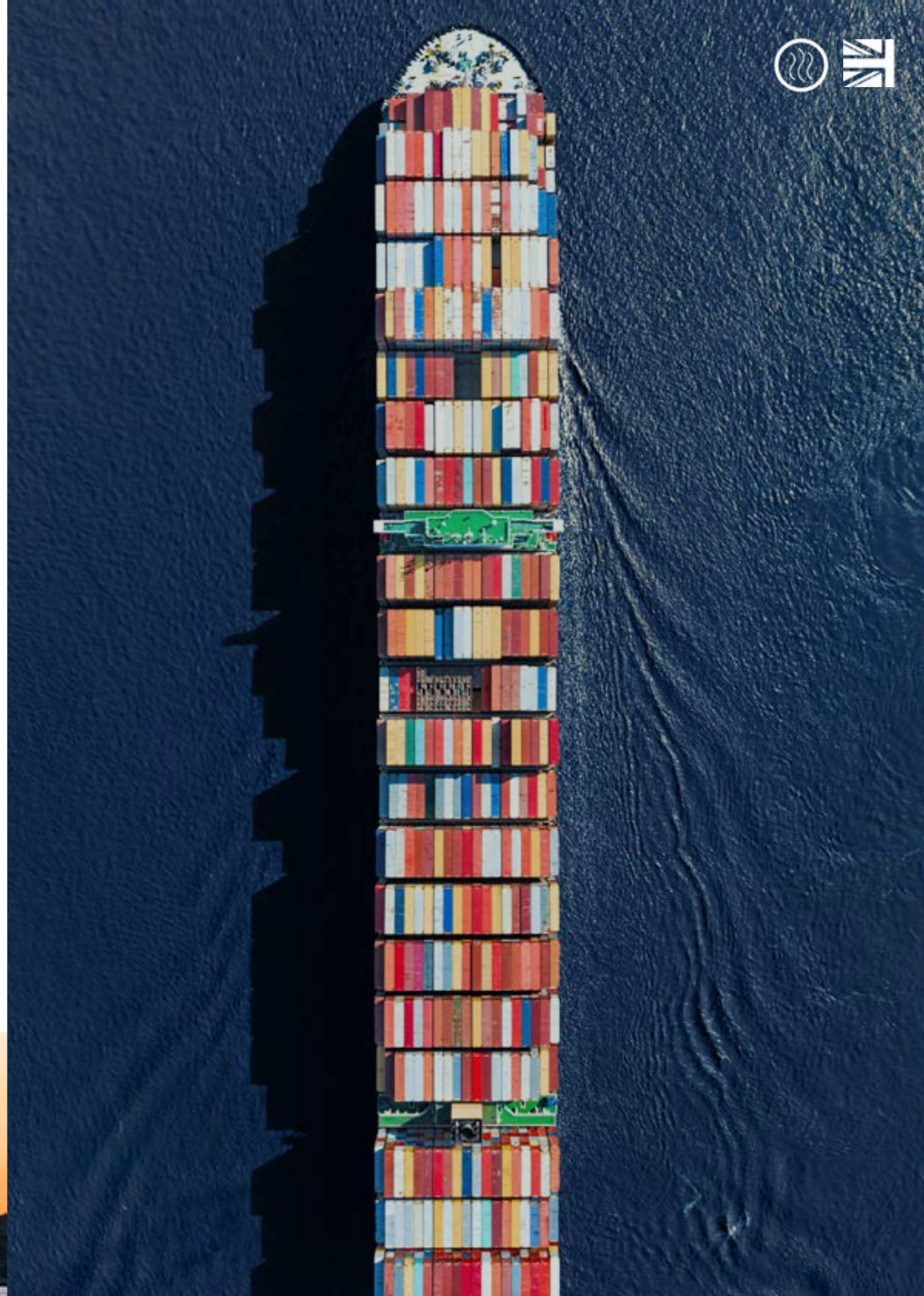
APPENDICES

APPENDIX 1: REGIONAL ECONOMIC IMPACT OF THE MARITIME INDUSTRY – CENTRE FOR ECONOMICS AND BUSINESS RESEARCH ANALYSIS 2019 AND 2022

Regional Economic Impact Analysis Comparison (2019 and 2021 reports)

Direct Economic Impact (2019 report figures shown in brackets)

REGION	DIRECT TURNOVER	DIRECT GVA	EMPLOYMENT	COE
Scotland	£9,359m (£8,688m)	£3,892m (£3,718m)	37403 (39761)	£1,507m (£1,446m)
Northern Ireland	£2,184m (£1,774m)	£400m (£376m)	5287 (5128)	£195m (£198m)
Wales	£546m (£775m)	£207m (£281m)	3616 (4308)	£111m (£132m)
North East	£728m (£827m)	£265m (£304m)	4276 (4939)	£140m (£194m)
North West	£5,369m (£5,150m)	£1,556m (£1,263m)	22800 (19977)	£968m (£769m)
Yorkshire & Humber	£1,089m (£1,241m)	£427m (£545m)	7270 (10106)	£240m (£301m)
East Midlands	£634m (£535m)	£191m (£178m)	3928 (3880)	£114m (£106m)
West Midlands	£708m (£453m)	£244m (£165m)	4466 (3297)	£140m (£114m)
East of England	£2,995m (£2,852m)	£1,033m (£1,050m)	15992 (16033)	£567m (£562m)
London	£15,166m (£12,186m)	£5,284m (£4,418m)	45207 (39629)	£2,149m (£1,866m)
South East	£12,695m (£10,473m)	£3,771m (£3,619m)	46887 (44033)	£1,876m (£1,714m)
South West	£4,002m (£3,402m)	£1,417m (£1,537m)	29035 (29880)	£965m (£1,005m)



REGION	TURNOVER	GVA	EMPLOYMENT	COE
Scotland	£20,473m (£17,058m)	£13,104m (£6,978m)	115000 (129800)	£4,102m (£6,690m)
Northern Ireland	£3,900m (£918m)	£961m (£484m)	16000 (16500)	£512m (£144m)
Wales	£1,039m (£2,031m)	£480m (£899m)	8000 (30900)	£228m (£459m)
North East	£1,404m (£4,302m)	£583m (£1,345m)	9000 (22500)	£287m (£792m)
North West	£10,245m (£6,552m)	£3,842m (£2,890m)	62000 (76100)	£2,302m (£1,060m)
Yorkshire & Humber	£2,135m (£3,910m)	£984m (£2,151m)	17000 (34000)	£511m (£773m)
East Midlands	£1,288m (£885m)	£434m (£432m)	8000 (11600)	£213m (£203m)
West Midlands	£1,286m (£1,274m)	£514m (£432m)	10000 (11600)	£279m (£234m)
East of England	£5,904m (£5,441m)	£2,474m (£2,692m)	38000 (52700)	£1,280m (£1,019m)
London	£27,271m (£23,701m)	£11,681m (£8,930m)	134000 (236000)	£4,997m (£4,172m)
South East	£23,497m (£9,923m)	£9,377m (£4,466m)	130000 (145600)	£4,897m (£1,636m)
South West	£7,599m (£7,527m)	£3,562m (£3,121m)	63000 (76700)	£2,024m (£1,453m)

NOTES

- Data drawn from the Maritime UK State of the Maritime Nation Report 2022 (Cebr) - represents the state of the industry in 2019
- Figures shown in brackets are from the 2019 report which is the state of the industry in 2017
- COE - Compensation of Employees
- Aggregate impact is: direct impact + indirect impact + induced impact.

APPENDIX 2: REGIONAL CLUSTER DEVELOPMENT PROGRAMME – 3-YEAR PLAN AS AGREED IN 2021

OVERALL FOCUS (2021 TO 2023)

YEAR 1 (2021)	YEAR 2 (2022)	YEAR 3 (2023)
Mersey Maritime – full regional members of MUK – consolidate/ support	North East	North Wales
MUK Solent – full regional members of MUK – consolidate/ support	South Wales	Mid-country
MUK South West – full regional members of MUK – consolidate/ support	Bristol (could be with South Wales)	Other areas on a case by case basis as opportunities arise
Northern Ireland – full regional members of MUK – consolidate/ support	Scotland (phase 2 – consideration of satellite RCOs under the wider umbrella)	
East Anglia – launch new in 2021 (remains work in progress, 2022)	Mersey Maritime – full regional members of MUK – consolidate/ support	
South East – launch new in 2021 (remains work in progress, 2022)		
Scotland – take to some degree of paid MUK membership (remains work in progress, 2022 – sustainability models presented and funding secured for immediate future by SMC)		
Yorkshire & Humber – take to some degree of paid MUK membership (remains work in progress, 2022)		



SAMPLE 12-MONTH PLAN (2021) – AS AGREED AT THE START OF PHASE 2 OF THE DELIVERY PROGRAMME

NB: this was the scheduled work programme, the actual delivery against this is detailed elsewhere in this report and may not follow precisely the indicative activity noted here.

Q1 (January, February, March)

- Regional Cluster Development Plan review meetings – priority to cover existing full regional members, i.e. Maritime UK South West; Maritime UK Solent, Belfast Maritime Consortium; Mersey Maritime
- Half yearly sitrep with regions not covered by RCDP meetings (Scotland; Team Humber Marine Alliance)
- Belfast Maritime Consortium – introduction to Maritime UK; build relationship; involve other MUK programmes and agree deliverables
- Progress and launch new RCO in the South East (building on work of 2020)
- Progress and launch new RCO in East Anglia (building on work from 2019/20)
- Exploration of external funding opportunities (EU via CMN/Paul Wickes)
- Road to Net Zero Events – Mersey Maritime (29/03/21); other regions to programme on a month by month schedule
- Comprehensive quarterly regional survey – ‘Maritime Regions Sector Dashboard’
- Commence State of the Maritime Nation Cebr engagement for regional participants
- Clean Maritime Demonstration Competition briefing meetings (26, 27 and 28 January 2021)
- Regional Council – full – March (online)
- Regional Council – new Chair / Vice Chair – settle personnel and put in process for approval at next MUK National Council (April)
- DfT ‘Programme Planning’ – with Catherine Cornwell (30/03/21)

Q2 (April, May, June)

- Programme Planning – with Ben Murray (13 April 2021)
- Regular reporting to MUK National Council – 26 April 2021
- Progress RCO development in regions identified in Q1 (SE and East Anglia)
- Progress RCO development in new areas of opportunity (see grid below)
- Road to Net Zero Events – region by region plan to continue (MUK Solent – May)
- Comprehensive quarterly regional survey – ‘Maritime Regions Sector Dashboard’
- Ongoing State of the Maritime Nation Cebr engagement for regional participants
- Regional engagement in ‘Maritime 2050 Conference’ (June)
- Regional Council – full – June/July (in person)
- Quarterly report to DfT (end of June – TBC)

Q3 (July, August, September)

- Regional Cluster Development Plan review meetings – priority to cover existing full regional members, i.e. Maritime UK South West; Maritime UK Solent, Belfast Maritime Consortium; Mersey Maritime
- Regular reporting to MUK National Council – 22 July 2021
- Half yearly sitrep with regions not covered by RCDP meetings (Scotland; Team Humber Marine Alliance)
- Progress RCO development in new areas of opportunity (see grid below)
- Road to Net Zero Events – region by region plan to continue
- Comprehensive quarterly regional survey – ‘Maritime Regions Sector Dashboard’
- Complete State of the Maritime Nation Cebr engagement for regional participants and launch at LISW

- London International Shipping Week (London and region-based activity)
- Regional Council – full – September (physical – London [at LISW?] or Scotland)
- Quarterly report to DfT (end of September – TBC)

Q4 (October, November, December)

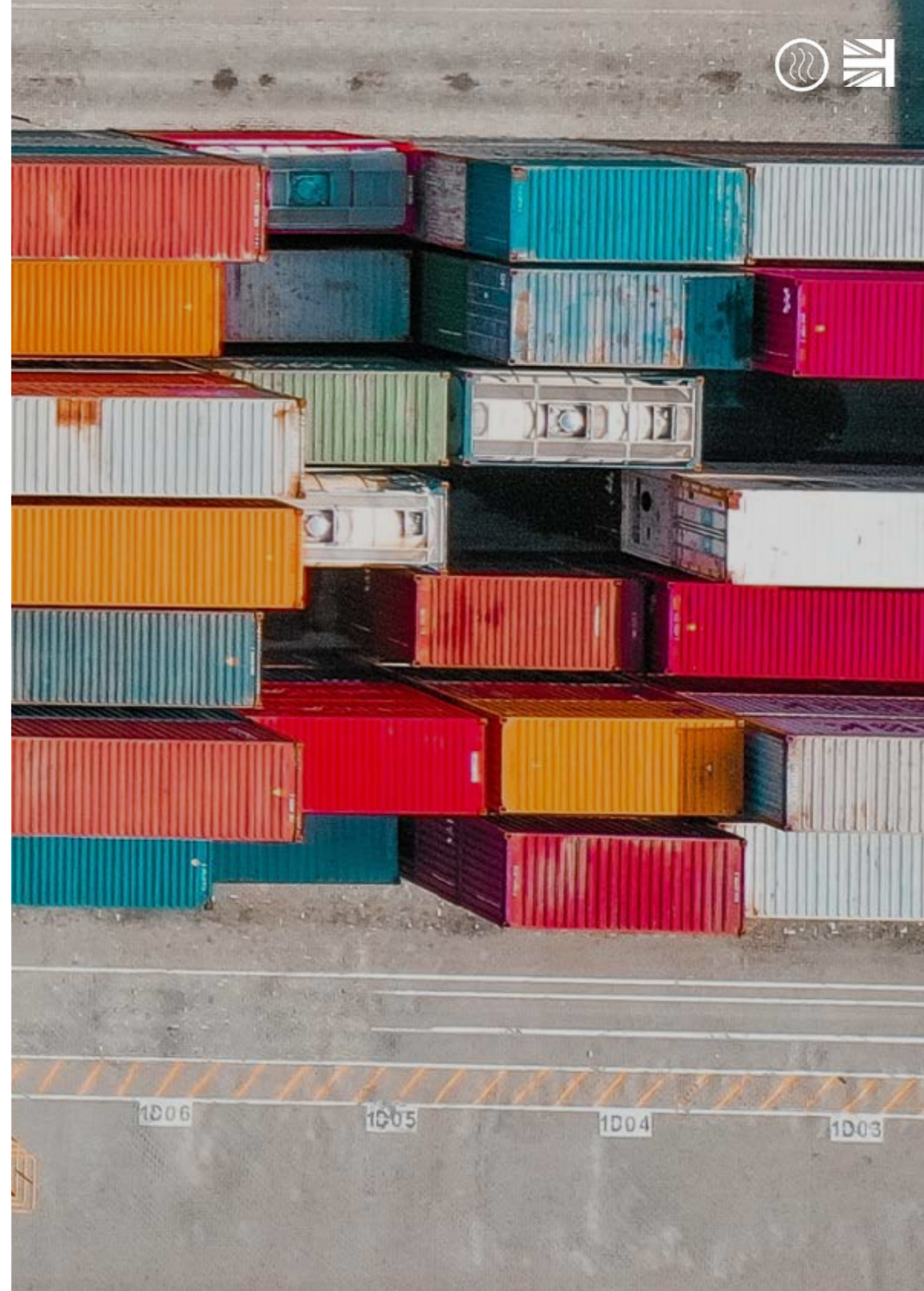
- Progress RCO development in new areas of opportunity (see grid below)
- Regular reporting to MUK National Council – 14 October 2021
- Road to Net Zero Events – outstanding to take place by end of October 2021
- COP26: 01-12 November 2021 – how might MUK regions be involved in this?
- Regional Council – full – December (in person - South West?)
- Quarterly report to DfT (end of December – TBC).



APPENDIX 3: CONTACT DETAILS AND GEOGRAPHICAL COVERAGE



ORGANISATION	GEOGRAPHICAL AREA COVERED	KEY ORGANISATIONAL BODY	MUK STATUS	WEB LINK FOR FURTHER INFORMATION
Belfast Maritime Consortium	Northern Ireland	Artemis Technologies	Full MUK regional member	Click HERE
Maritime UK Solent	Solent LEP area	Solent LEP	Full MUK regional member	Click HERE
Maritime UK South West (inc. Cornwall Marine Network)	Cornwall & Isles of Scilly LEP, Dorset LEP, Heart of the SW LEP	Cornwall Marine Network	Full MUK regional member	Click HERE
Mersey Maritime	Liverpool City Region / wider North West	Mersey Maritime	Full MUK regional member	Click HERE
Scottish Maritime Cluster	Scotland	Scottish Maritime Cluster	Regional Council member	Click HERE
Humber Marine and Renewables (formerly Team Humber Marine Alliance)	Humber	Humber Marine and Renewables	Regional Council member	Click HERE
East Anglia	New Anglia LEP	N/A	Invited to Regional Council as key contact – development area	
East Anglia	South East LEP	N/A	Invited to Regional Council as key contact – development area	
North East (1)	Tyne	N/A	Invited to Regional Council as key contact – development area	





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