

JOURNAL

2022



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

Publisher

Andy Bullen

Sales Manager

Martin Lacey

Editorial

UK Chamber of Shipping

Namrata Nadkarni

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ICS (International Chamber

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Andrew Sassoi-Walker

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Linda Roast

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PRESIDENT'S FOREWORD

John Denholm CBE, UK Chamber of Shipping President, 2020-2022



THE WORLD IS CHANGING AT AN EVER-INCREASING SPEED, AND THROUGHOUT MY TIME AS PRESIDENT I HAVE SEEN AT FIRST HAND HOW THE UK CHAMBER OF SHIPPING HAS RISEN TO THE CHALLENGE.

When I took on the role two years ago Covid was beginning to take hold, freight rates for dry bulk carriers had collapsed and cruise ships loaded with passengers were being quarantined. I knew Covid was going to have a huge impact but did not foresee what its impact would be on our industry let alone on society as a whole. I said in this publication in 2020 that 'the Chamber is not just around for the good times and when things are easy; it is here to protect our great industry through the difficult times'. I hope everyone reading this would agree with me that this is exactly what the Chamber has done.

Throughout the pandemic the Chamber has worked relentlessly on behalf of our members, protecting the industry and successfully lobbying government on a range of issues.

But more widely across society, Covid has brought out the best and worst traits of mankind.

On the one hand it was incredible the way our nurses and doctors worked to bring people suffering from Covid back to health and in so doing put themselves at risk.

On the other it was extremely disappointing to witness the way countries have, and continue to, put up barriers to protect themselves in so doing made a misery of the lives of many people doing valuable jobs such as the crews on our ships, some of whom were stranded and others of whom had to stay on board their ships for a year or more.

Our seafarers are our most valuable resource and they deserve to be treated better than this.

Away from Covid, much of the work during my tenure, and specifically in the last 12 months, has been on tackling climate change and the difficult issue of decarbonisation.

I was incredibly proud that during London International Shipping Week and ahead of COP26 the Chamber took the decision to promote a target of net zero by 2050 for the shipping industry. We were one of the first shipping associations in the world to hold such a position and it demonstrates the paramount importance we attach to this issue.

We all know the world is changing quickly, and the shipping sector must keep up. The IMO still has a

target of cutting emissions by 50% compared to the 2008 level, but this just isn't good enough. If we don't as an industry come to an agreed position quickly and push for stronger action at the IMO, decisions will be made for us by governments around the world, a situation we need to avoid.

These decisions are not just vital for us as an industry, it is vital for the future of humankind. We must take action now otherwise we are putting the whole world at risk and with it the very future of our grandchildren and great grandchildren.

In November the world came together in Glasgow for COP26 and I was fortunate to be able to attend some of the shipping events. I was greatly heartened to hear of some of the developments that are being made but we know we need the IMO to start taking some tough decisions and I am hopeful we will see progress in the coming years.

Throughout this Journal you will see the range of work the Chamber has undertaken in the last 12 months, from developments on tonnage tax, the work of the MNTB, support for ferry and cruise sectors and the newly launched mental health guidance.

I want to pay thanks to the hard work and dedication of the policy team and the work undertaken by our committees and panels; it is only through an engaged membership can the Chamber work to develop solutions to the issues we face.

Over the next 12 months there are huge challenges for our industry, but also some wonderful opportunities and as I hand over to my successor Graham Westgarth, I look forward to seeing the Chamber once again seize on these opportunities and ensure the UK shipping sector continues to go from strength to strength.

A NEW COURSE

THE UK NEEDS TO MAKE SURE WE SEIZE FUTURE OPPORTUNITIES, TAKE THE STRATEGIC LEAD AS A NATION AND DEVELOP NEW TRADING PARTNERSHIPS.

Sarah Treseder OBE, UK Chamber of Shipping Chief Executive

WELCOME TO MY FIRST JOURNAL SINCE TAKING OVER AS CHAMBER CHIEF EXECUTIVE IN OCTOBER. The last few months have provided me with the opportunity to meet members and stakeholders and hear about the excellent work going on across our industry.

We all know it has been an incredibly tough time for much of the shipping sector over the last two years. Covid has fundamentally changed the world we live in, and for our industry we are still seeing issues with crew changes and shifting consumer patterns means there continues to be global supply chain issues with backlogs in ports around the world.

Despite these issues, seafarers have kept Britain supplied with the food, medicines and goods we have needed. Freight has continued to flow into the country because of our shipping and maritime key workers and everyone associated with the Chamber thanks them for their heroic work which continues to this day.

COVID

It goes without saying that Covid has been the dominant issue facing the sector in the last two years.

As a nation we are learning to live with the disease and the new variants that occur. In the last 12 months we have had Delta and Omicron, both causing huge issues across society.

At the Chamber we have worked with our members and industry partners to make sure we react to these events quickly and effectively. We have strengthened our relationships with departments across Whitehall, meaning we can feed back information in a timely fashion and lobby on behalf of our members more effectively.

Seafarer vaccinations has been one of the thorny issues of the year. In the UK we were pleased to see the government extend vaccinations to visiting seafarers but internationally there are reports of crew



Photo: Andrew Sassoli-Walker

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receiving multiple courses of vaccinations and multiple vaccine types. In the next year we will continue to work with our partners and do all we can to protect those working on board ships and ensure they get fair treatment around the world.

We have had numerous successes over the last 12 months, from ensuring offshore workers were exempt from self-isolation to the restart of domestic and international cruise. We know that Covid isn't going away, we are all learning to live with it and throughout this Journal you will see how our team has worked with governments and institutions to deliver for our members on a range of issues facing the sector.

DECARBONISATION

Action to slow down climate change took on an even greater significance this year with the COP26 meeting.

Ahead of the gathering in Glasgow, the Chamber announced its position that it wants the shipping industry to be net zero by 2050.

The current aim of cutting shipping's emissions by 50% just doesn't go far enough and it is imperative

that the IMO commits to a net zero carbon emissions target by 2050 as soon as possible.

As well as adjusting the 2050 target, we also need to look at technical solutions and infrastructure. We know the benefits of shore power but in the short-to-mid-term we are going to need to see more government investment, so the ports have the required infrastructure for new, greener ships.

You will read more about the issue of Market Based Measures and carbon pricing in Anna Ziou's section later in the Journal, but we know we need to act now to create incentives for people to act quickly. The Chamber will continue to work through the Carbon Working Group on the best solutions for our members.

One thing we have been clear about at the Chamber is the need for global solutions to the decarbonisation debate. Shipping is international by nature and we must avoid regional or national regulations which will harm the sector.

We must also ensure that the transition to a greener shipping future is a just transition for the

**AHEAD OF THE GATHERING IN GLASGOW,
THE CHAMBER ANNOUNCED ITS POSITION THAT IT WANTS
THE SHIPPING INDUSTRY TO BE NET ZERO BY 2050.**



Photo: ICS Stenaline Elektra



Photo: ICS RCCL-Wonder of the Seas

WE ARE PROUD THAT WE ARE SOUGHT OUT AS EXPERTS AND BY WORKING THROUGH TASKFORCES AND COUNCILS WE CAN ENSURE THAT OUR MEMBERS' VOICE IS HEARD AT THE VERY TOP OF GOVERNMENT.

people working in the industry. We need to invest in skills and retraining, making sure we continue to not only attract the best and the brightest, but retain those people already working in the sector. It is vital we utilise the personnel we already have and equip them with the new skills they need as businesses change in the coming years.

In the next 12 months there will be a huge focus within the Chamber on decarbonisation issues and we have strengthened our expertise in this area with the addition of Onder Canbulat to the Policy team. We will continue to push the IMO on net zero targets and making a decision on MBMs. Time is short but everyone at the Chamber is clear about what needs to be done to make our industry even cleaner and greener.

BREXIT

After the furore caused by the decision to leave the European Union in 2016 and the resulting turbulent years, 2021 has seen Brexit knocked from the headlines with things being rather in limbo.

January 1st 2022 saw new changes in how we deal with trade with our European partners. We have seen some initial teething issues, but we are hopeful these will be short-lived.

As we set a new course for ourselves, we need to make sure we seize future opportunities and take the strategic lead as a nation and developing new trading partnerships, whilst accepting that we have to find a sustainable way of doing business with our near partners in Europe.

SUPPLY CHAINS

In March last year the world's attention turned to Egypt as the Ever Given ship got stuck in the Suez Canal. This incident raised awareness across the globe of the critically important role ships and shipping play in moving global trade.

Throughout 2021 we saw issues with global supply chains, with bottlenecks in ports around the world. At the Chamber we worked through the Government's Freight Council and the National Economic Recovery Taskforce which reported to the Prime Minister, and we met with Sir Dave Lewis, the government's supply

chain tsar, to advise on how the shipping sector could ease the strain where possible.

We are proud that we are sought out as experts in these areas and by working through such taskforces and councils we can ensure that our members' voice is heard at the very top of government.

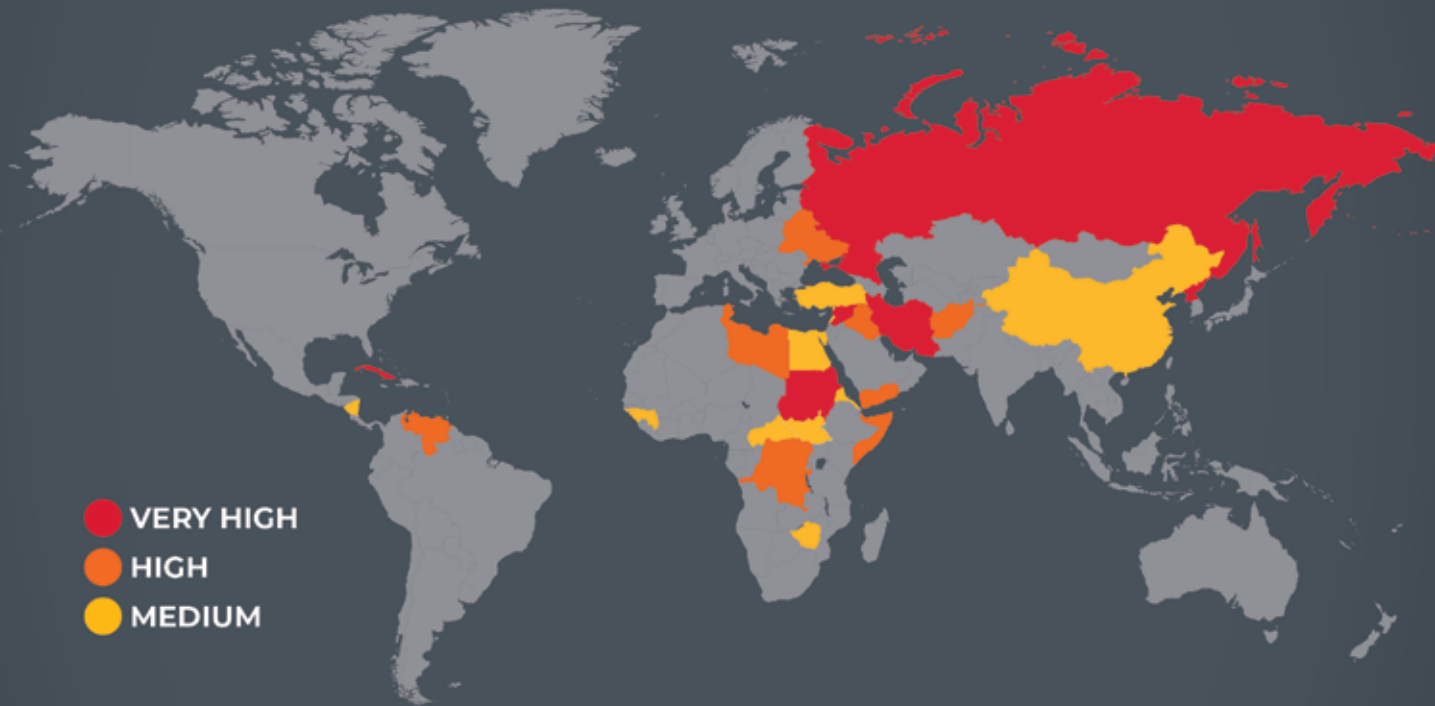
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Commission which was set up to ensure the UK's maritime industry has the talent to serve the sector and compete with the rest of the world. A key priority for us for 2022 will be to develop our own proposals for the Commission which not only reflect the views of the shipowners but give the Commission practical steps on what is needed to ensure we have a vibrant, skilled talent pool in the future.

In November the Maritime & Coastguard Agency confirmed a further six-month extension to the Maritime Training (SMarT) Fund, for cadets unable to finish their training due to Covid, something the Merchant Navy Training Board has long been calling for. We are pleased that the MCA listened to our plea to provide additional funding to support our cadets through this difficult time. We know this 6-month extension will benefit those cadets whose training has been severely impacted by Covid and this was a major policy win for the Chamber in 2021.

TONNAGE TAX

Tonnage Tax has caused a renaissance in shipping since its introduction in 2000 and it was in urgent need of updating to respond to changing trends in shipping and to better protect and promote maritime UK and global Britain.

In the Autumn Budget the Chancellor announced changes to the Tonnage Tax regime which will strengthen the UK Flag, encourage innovation in the offshore energy sector and attract international investment. There is more work to be done to promote the employment and training of seafarers, and broadening the regime, but it is testament to the work of the Chamber and our policy team that we secured such a positive outcome for our members.

NATIONALITY AND BORDERS BILL

Our engagement with government spans right across Whitehall. We spent months lobbying the Home Office



Photo: ICS

IN THE AUTUMN BUDGET THE CHANCELLOR ANNOUNCED CHANGES TO THE TONNAGE TAX REGIME WHICH WILL STRENGTHEN THE UK FLAG, ENCOURAGE INNOVATION IN THE OFFSHORE ENERGY SECTOR AND ATTRACT INTERNATIONAL INVESTMENT.

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AS WE LOOK FORWARD, I WANT THE CHAMBER TO BECOME EVEN MORE ENGAGED WITH OUR MEMBERSHIP, TO DEVELOP AND DEEPEN OUR RELATIONSHIP WITH MINISTERS AND POLITICIANS AND FOR THE INDUSTRY TO SEIZE THE OPPORTUNITIES AHEAD OF US.

on the new Nationality and Borders Bill. The original draft of the Bill left open the possibility that seafarers may be convicted for saving the life of someone in distress.

After extensive lobbying from the UK Chamber of Shipping, the Government tabled an amendment to the Bill which will exempt seafarers from criminal prosecution for helping rescue people at sea.

And this is what the Chamber is here for. It is here to protect our seafarers and our members, promote what they do and lobby government on their behalf.

As we look forward, I want the Chamber to become even more engaged with our membership, to develop and deepen our relationship with ministers and politicians and for the industry to seize the opportunities ahead of us.

We know the last two years have been challenging, like no others in recent memory, but we started 2022 on a positive note with our Annual Dinner in London. It was great to see so many people enjoy what was a

wonderful evening and we hope this is the start of the return to more face-to-face events, whilst still utilising the hybrid options which have worked so well and which have benefitted so many of our members who are based all across the UK.

What the last few years have taught me is the only constant we can be sure of is change. The degree of change recently has accelerated, and at the Chamber we will continue to become more agile and proactive to drive the change that our members and industry need.

One change at the Chamber is the handover of Presidency. John Denholm is stepping down after two years and will be handing the baton over to Graham Westgarth.

John has done so much for the Chamber at one of the toughest times in recent memory and he moves on with our heartfelt thanks for all that he has done and our congratulations for receiving a CBE in the New Years Honours List.



COLLABORATION IS KEY

WE WILL MAINTAIN OUR WORLD STANDING BY LISTENING TO, CONSULTING WITH AND WORKING COOPERATIVELY WITH OUR MULTITUDE OF STAKEHOLDERS IN THE MARITIME WORLD.

Robert Courts MP, UK Government Shipping Minister

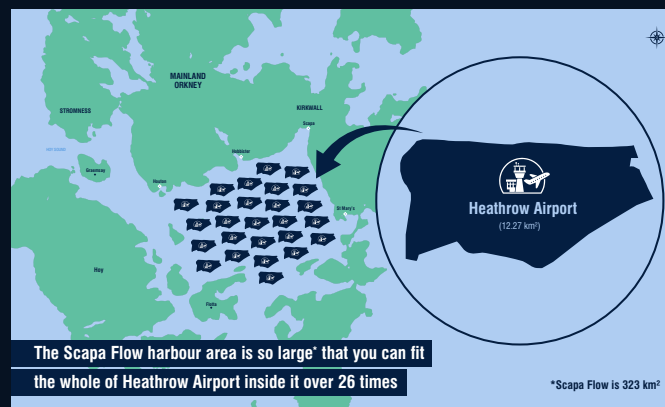


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AS I REFLECT ON WHAT HAS BEEN ANOTHER CHALLENGING YEAR IN WHICH WE HAVE CONTINUED TACKLING THE ONGOING PANDEMIC AND THE PERIODS OF UNCERTAINTY AND ADVERSITY THAT BROUGHT US ALL, I am also filled with pride in all that the UK maritime sector has yet again achieved, despite the challenges it has faced.

We began 2021 facing a new trading environment as we finally left the EU, and some expressed concerns that the flow of goods and freight would be hugely impacted, further complicated by the second wave of Covid. That situation did not arise, and throughout the year our supply chains continued to meet the challenges that confronted them, keeping this country moving and food, goods and vital supplies flowing into the country. This is thanks in no small part to all those on the front lines, at our ports and on our maritime routes, as well as the work our stakeholders across the industry have done to collaborate with government and make sure we anticipated any issues before they arose.

As the year progressed, we saw the successful resumption of our cruise sector in late spring, with domestic sailings at first but then the resumption of international sailings later in the year. I cannot emphasise enough how much work went into the safe reintroduction of sailings, and I firmly believe that it represents an exceptional example of government and industry working collaborative to deliver a shared objective. The UK and international cruise sector contributes a significant amount to the UK economy, not just in cruise operators and ports themselves but supporting supply chains across the country, and I want to express my gratitude for all those involved in this work.

On the subject of cruises, I was delighted to have been given a tour of MS IONA, P&O's new LNG powered ship, which as one of the first cruise ships in the world to be equipped with this propulsion system is a real asset to the UK Ship Register. The road to a fully decarbonised maritime fleet is a long one but the introduction of this and many other vessels operating



Photo: ICS MS Iona water arch

AS THE YEAR PROGRESSED, WE SAW THE SUCCESSFUL RESUMPTION OF OUR CRUISE SECTOR IN LATE SPRING, WITH DOMESTIC SAILINGS AT FIRST BUT THEN THE RESUMPTION OF INTERNATIONAL SAILINGS LATER IN THE YEAR.

using alternative fuels shows that the UK is committed to delivering a cleaner and greener sector.

As a Government we are committed to continuing to lead the quest to deliver decarbonisation right across the maritime sector. In the 2020 Spending Review we were granted £23m by the Chancellor which allowed us to launch the first Clean Maritime Demonstration Competition. The 39 successful winners were announced by the Secretary of State during London International Shipping Week 2021 and those projects are now progressing with their work to research, develop and deliver new and innovative solutions to bring us a step closer to delivering net zero by 2050.

As you know, London International Shipping Week was just the first of a series of major events held in 2021. It was fantastic to once again be able to meet

and discuss the challenge of decarbonisation, stimulate trade, showcase the UK's competitive advantage for maritime and to see the investment being pumped into our ports infrastructure. Among the highlights, an event hosted by the Chamber to announce £300m of investment into London Gateway, part of the new Thames Freeport by DP World, and the official opening of the new Horizon Cruise Terminal at ABP Southampton complete with shore power capabilities showed the world that the UK is the place to trade, visit and innovate.

This was followed by the Global Maritime Forum coming to London, where we welcomed the international maritime sector to showcase the best of what we do. Then COP26, where the eyes of the world turned to Glasgow as governments from around the

world came together to discuss our role in combatting climate change. I was immensely proud to launch the Clydebank Declaration, where we joined other nations to commit to the establishment of the first ever green shipping corridors. This, alongside our work with industry to commit to new targets for decarbonising the UK's offshore wind sector, again showed that the UK is at the forefront of delivering a cleaner maritime environment.

Maritime trade of course remains critically important to us as an island nation, and with over 90% of everything we consume coming to us by sea, the beating heart of our national economy. As we forge new trade deals around the world, our trade is still forecast to grow over the next 10 years. The investments we've seen in our infrastructure and the

introduction of our new freeports means we are well prepared to deal with the uncertainties that can arise, and therefore even more attractive to global trading partners. The UK is an incredibly attractive prospect to global shipping and this government has every intention of maintaining this reputation. This is reflected in industry confidence in the UK: the investment at London Gateway, Immingham, Southampton and dozens of other ports all around the UK are a clear signal of the growing trade links that are being welcomed by the UK.

We cannot maintain our world standing without listening to, consulting with and working cooperatively with our multitudes of stakeholders in the maritime world. The dedication and open relationships we have with all our stakeholders make us all stronger, and I am confident that the work we do together means we are



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Photo: Andrew Sassoli-Walker



**I STRONGLY BELIEVE THAT THE UK IS THE BEST PLACE
IN THE WORLD TO DO MARITIME BUSINESS AND
WE INTEND TO GROW THAT SECTOR FURTHER...**

in a better position to help each other and the wider country to grow and prosper.

Collaboration is key – when Government and industry work hand-in-hand, we achieve great results. Maritime 2050, our high-level ambition for the sector, is once again gathering momentum after the speed bumps caused by the global pandemic. From maritime security to increasing diversity in the sector, driving forward decarbonisation and promoting maritime skills and careers once more, progress is being delivered.

The department will soon launch our recovery route map which will detail how we will continue to work with the maritime sector and build back stronger over the coming decade, as well as continuing to support our formidable maritime

professional business services which remain some of the finest in the world.

I strongly believe that the UK is the best place in the world to do maritime business and we intend to grow that sector further and attract new business to the UK and increase our competitive advantage.

We have much to do and much to look forward to, and I would like to once again extend my continued thanks to everyone in the sector for the support, determination and cooperation that they have demonstrated in working with my department over the past year. Since March 2020 we have faced some of our biggest challenges, but I believe that we have weathered the storm and are now emerging stronger, greener and more determined than ever to keep the UK the world's leading maritime nation.

DRIVING THE CHANGE

THE UK CHAMBER IS COMMITTED TO DELIVERING WORKABLE SOLUTIONS FOR DECARBONISING SHIPPING AND FIGHTING CLIMATE CHANGE WHILE MAINTAINING A LEVEL PLAYING FIELD FOR OUR MEMBERS.

Anna Ziou, Policy Director - Safety and Environment

THE PAST YEAR HAS DEMONSTRATED THE MARITIME INDUSTRY'S COMMITMENT TO TAKE CONCRETE STEPS TOWARDS DECARBONISING SHIPPING AND FIGHTING CLIMATE CHANGE. The UK Chamber of Shipping has been advocating for our member needs in a number of high-level meetings throughout 2021. In June, we contributed to the IMO's MEPC76 agreement on short-term measures to improve the carbon efficiency of existing fleet and prompted discussions on various medium-term measures, including market based measures (MBMs). This was followed, in November, by COP26 in Glasgow, which provided a platform for wider discussions of climate change policy.

Although COP didn't have a shipping focus and was more focused on shoreside changes, it was vital that

the UK Chamber be present in these discussions as they drive international policy and often set the stage for what is eventually decided at IMO. We noticed a shipping industry-led narrative that was significantly more ambitious when compared to the past and in fact there were a number of initiatives and declarations signed during the Glasgow event to cement these ambitions into action. The UK Chamber itself signed up to the Global Maritime Forum's Call to Action for Shipping Decarbonization by 2050.

The bullishness shown at COP was echoed at MEPC77 in late November, with an increasing number of IMO Member States asking the IMO to committing to zero emission by 2050 and discussions being focused on R&D funding and MBM options. We were very pleased to have received the support of the UK to



speak at IMO in support of the ICS \$5 billion Research & Development (R&D) fund. However, despite the industry driving change, negotiations at MEPC77 stalled and we saw very little progress in that session.

In fact, we are disappointed by the decision to send the industry's R&D Fund proposal to the next session of the IMO's Intersessional Working Group on Reduction of GHG Emissions from Ships. The delay to acting on this proposal elongates the timeline needed to develop the necessary technologies to enable the

industry to meet a net zero carbon target by 2050. We were also disappointed – as were other stakeholders – that the IMO did not commit to a resolution to align with the Paris Agreement's 1.5-degree temperature goals.

The UK Chamber remains committed to achieving net zero carbon by 2050 and we believe that emission reduction measures on an absolute basis to support this goal should start immediately. Carbon pricing is essential to incentivise change in order to meet this goal, which is why we feel that the IMO should

implement an MBM using a carbon price mechanism in order to provide the economic incentive to drive change.

As part of our commitment to helping the industry meet this target we are advocating for the need and benefits that a carbon price MBM would bring.

That said, we recognise that different types of MBMs have varying advantages and disadvantages and that there are differences of opinion as to the best way forward – even amongst our membership. This is why we will support any MBM that can be

implemented quickly as the need for an MBM is urgent, provides a level playing field, is easy to administer and will not be open to abuse. We believe that to be acceptable, an MBM must provide meaningful economic incentives to adopt net zero energy sources – and any funds generated should preferably be utilised for the benefit of the industry, whether in R&D, infrastructure generation, financial deployment of the new fuels while also ensuring a just and equitable transition in line with IMO's Common But Differentiated Responsibilities (CBDR) principles.



Photo: ICS

THE UK CHAMBER REMAINS COMMITTED TO ACHIEVING NET ZERO BY 2050 AND WE BELIEVE THAT EMISSION REDUCTION MEASURES ON AN ABSOLUTE BASIS TO SUPPORT THIS GOAL SHOULD START IMMEDIATELY.



SOCOTEC Sustainable Shipping Methods

Following COP26 and the increasing focus on the reduction of air pollution and improving sustainability in shipping, the role that exhaust gas cleaning systems (EGCS) can play to tackle emissions beyond sulphur has become a hot topic of conversation.

Under the latest regulations, ship owners/operators are facing the challenge of meeting sustainability targets and reducing emissions from their fleets in a relatively short timeframe. While the global sulphur cap is an important step towards reducing harmful pollutants from shipping, it also guides the industry to proactively develop new systems to manage and track baseline compliance, as well as encourage greater environmental performance.

WHAT ARE THE BENEFITS OF USING SCRUBBERS FROM A COMPLIANCE PERSPECTIVE?

In lieu of the technological advancements offered by alternative propulsion and generator systems, as well as the current inability to provide shore power to vessels of all sizes in all ports, scrubbers are among the sulphur cap compliance options of choice for owners and operators. The fuel spread has been positively progressing and stands today around EUR 113 per tonne. This results in a growing interest from ship owners and operators who recognise the economic benefits of installing a system. The high activity levels in the newbuilding market and selection of scrubbers available further strengthens owners' trust in the technology as a compliance option.

Moreover, open-loop scrubbers have received a recent boost after an independent eco-toxicity study. This found that the technology – which runs in an open-loop configuration – does not automatically

create unwarranted environmental risk, but must be monitored through analytical testing twice in the first year of installed scrubber operation and once annually thereafter.

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Photo: ICS Armas Trasmediterranea Volcan at Tagoro



WE RECOGNISE THAT THE DISCUSSIONS AROUND MBMS ARE STILL DEVELOPING AND ARE POLITICALLY CONTROVERSIAL, BUT WE BELIEVE THAT THESE ARE URGENTLY NEEDED.

This would increase its effectiveness, ensure industry buy-in and accelerate the journey to decarbonisation. In addition, the UK Chamber recognises that technical and other potential command and control measures implemented on a global basis by the IMO are necessary to complement an MBM as they will drive greenhouse gas emissions efficiency in the operation of the existing fleet.

We recognise that the discussion around MBMs is still developing and is politically controversial, but we believe that these are urgently needed. This is a view shared by UK Chamber members, who have unequivocally stated that MBMs are critical to transitioning shipping to 2050 decarbonisation targets and incentivising a greener, more efficient fleet. If an international approach is not agreed, we risk the creation of multiple regional regulations. This can already be seen in with the decision, in March 2021, to include international shipping in the UK's domestic carbon budget. This is significant as it makes the UK legally responsible for the net zero status of international vessels calling at UK ports from 2050

onwards – which is extremely challenging without a global standard.

The UK Chamber is sensitive to the fact that the IMO has been working on this divisive issue during the Covid pandemic, which has necessitated online sessions with limited timings. As we return to in-person meetings, we hope that these will facilitate greater change and collaboration and that the next MEPC will see more decisive action come out of the IMO and its Member States. Everyone must come to the table prepared to be flexible, with a mindset of compromise and with a willingness to put aside political agendas for the greater good.

As we make progress on MBMs, we must also ensure that other decarbonisation issues receive sufficient focus. In particular, we feel that attention should be paid to the development of a framework for the lifecycle of fuels and the fair implementation of the upcoming Carbon Intensity Indicator (CII) regulation, which comes into force in 2023.

Aside from the IMO, the Chamber has also been more active in the UK's domestic action. We have



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been engaging with the Department for Transport (DfT) on the Transport Decarbonisation plan which was published in summer 2021, at the same time as the EU's Fit for 55 proposal. The plan includes a number of commitments and consultations, which we expect to resolve in forthcoming discussions about how to decarbonise the UK's maritime sector. This includes a review of the clean maritime plan to improve targets for the domestic sector, as well as a plan for the potential phase out date for sale of non-zero emission domestic vessels.

The Chamber and its members have also worked closely with the UK Government over the past year. We facilitated workshops about how best to transition the Clydebank Declaration for green shipping corridors from an agreement to a working reality, became a supporting member of the Operation Zero initiative that aims to demonstrate shipping's leadership in

climate action in the offshore wind sector and we have also been collaborating closely with the DfT to develop guidelines on the UK MRV scheme which implements the EU MRV in UK waters in a post-Brexit era.

We have also worked closely with the DfT in the development of a spending review and we were pleased to see that a budget of £300 million has been announced. We expect a large proportion of this to be used to help decarbonise the UK maritime industry so that it is on a par with other transport modes. The UK Chamber is a member of a number of national taskforces that focus on economic incentives for domestic shipping, clean maritime technologies and fuel pathways, shore power infrastructure in UK ports, and international shipping. We will use these platforms to continue to advocate for our members and to ensure that we remain competitive in a decarbonised future.

WE ARE ALREADY SEEING PROOF THAT OUR MEMBERS ARE ON THE RIGHT TRACK FOR NET ZERO AND THERE HAVE BEEN SOME FANTASTIC TECHNICAL ACHIEVEMENTS.



Photo: ICS - Officers on the bridge of the *Balera*

HFW

CYBER SECURITY Are you ready?

One year on since cyber security became a mandatory requirement of the International Safety Management (ISM) Code on 1 January 2021, we analyse the impact of IMO Resolution MSC.428(98) on shipowners and managers and the status of cyber risk in the maritime industry.

Recent years have seen several major shipping lines reporting cyber attacks, such as CMA CGM, APM-Maersk, MSC and COSCO, with the trend intensifying during the Covid-19 pandemic. Some commentators suggest attacks have increased up to 900% during the pandemic, with 2021 seeing prominent attacks targeting infrastructure. The May 2021 “DarkSide” cyber attack on the US East Coast Colonial Pipeline extorted nearly US\$5million from a fuel pipeline operator, depleting supplies to the extent that a state of emergency was declared in some areas. The level of disruption caused by a ransomware attack to operations at a number of ports in South Africa led to the operator, Transnet, declaring a force majeure event in July 2021.

The cost of inaction is high; aside from the short term inconvenience of dealing with a cyber attack, the repercussions are potentially far more significant, with risks including espionage, reputational damage, invasion of privacy, vessel and personnel safety, hijacking and ransom.

As cyber security resilience is now an integral part of the ISM Code, we investigate steps taken by shipowners and managers to mitigate their position and demonstrate the discharge of obligations in relation to shipboard cyber arrangements to avoid rendering vessels unseaworthy.

The obligation under English law to provide a seaworthy vessel is set out (i) by statute; (ii) by contract; and (iii) at common law, where the benchmark legal test for seaworthiness relies on the ‘prudent owner’ test, i.e. whether a prudent shipowner with knowledge of a defect would have required the defect to be made good before sending the ship to sea. In the context of cyber security, a failure to patch a software system may be considered a defect leading to unseaworthiness. The “non-delegable” aspect of the seaworthiness obligation would leave owners liable for the negligence of a third party contractor even where shore side systems are perfect.

The implications of unseaworthiness range from criminal liability resulting in a fine, to breach of insurance obligations resulting in loss of cover, and/or cargo claims brought against owners by charterers. Further, rights to limit liability under the Convention on Limitation of Liability for Maritime Claims 1976 may be waived if it can be shown that owners committed an act or omission with intent to cause loss, or recklessly and with the knowledge that such loss would probably result.

The ISM code provides an international standard for the safe management and operation of ships and for pollution prevention. Cyber security must now be properly documented within a vessels’ Safety Management System (SMS) and a valid Document of Compliance must be carried on board. While lack of documentation in itself does not render a vessel unseaworthy, the requirements of best management practice and the ISM code require detailed written systems and procedures in place for management and navigation of a vessel, including shipboard operations and emergency response protocols. The absence of such procedures, will impact upon both unseaworthiness and due diligence obligations.

Regardless of crew competence (including relevant training or familiarity, the lack of which may affect seaworthiness) a vessel without a proper “instruction manual” is unseaworthy. In the event that a cyber attack causes a vessel to ground or collide with another vessel, the burden remains on a claimant to prove the vessel was unseaworthy and that the unseaworthiness caused the incident. If that burden is discharged, the burden passes to owners to prove that they and those for whom they are responsible exercised due diligence to make the ship seaworthy and that the incident occurred despite such due diligence.

Due diligence extends to shore side personnel including owners, managers, and those responsible for officer/crew recruitment and training. Monitoring and management of mariners is a fundamental part of the master and senior officers’ roles, and failing to spot incompetence, negligence and poor practices and/or failing to ensure compliance with correct systems and procedures may result in a finding of negligence, particularly if such a failing is habitual or systemic and evident at the beginning of a voyage.

Ability to demonstrate adequate procedures and systems, and the diligence of personnel is therefore paramount. A vessel’s cyber resilience can be evidenced not only by compliance with the ISM code, but also by providing a paper trail demonstrating company best practices, an adequate SMS, and relevant education of, and compliance by, the master and crew.

While no legal cases linked specifically to cyber attacks have been submitted to the English courts within the last year, it is important to note that case law is changing and with it, the scope of unseaworthiness claims.

The implications and importance of not only providing a suitable SMS but ensuring and continuing to support

and enhance its implementation was laid to bear in the 2019 CMA CGM Libra judgment¹ which was recently upheld by the Supreme Court².

There have also been less high profile cases on this subject; ISM Code Regulation 12 requires shipowners to carry out internal safety audits and to periodically evaluate the effectiveness of the SMS. How an owner chooses to do this is subjective, but in a recent unreported arbitral decision, the tribunal made it clear that an owner who pays ‘lip service’ to the ISM code and turns a blind eye to ‘box ticking’ on board a vessel, no matter how unwittingly, is likely to receive an adverse decision in relation to the vessel’s seaworthiness.

In light of legal and regulatory developments linked to the use of new technology on board ships, it is essential that shipowners take proper advice and implement effective policies and procedures, systems, controls and frameworks for data protection to avoid liability for cyber breaches. Installing systems to prevent cyber attacks and developing risk avoidance strategies will go some way to defending future unseaworthiness claims. Incidents caused by ‘inadvertent’ introduction of a virus by ill-trained crew will no longer be tolerated in circumstances where this can be mitigated. It is no longer acceptable for owners and operators to pay ‘lip service’ to the threat of cyber attacks to their operations. In the event of a cyber attack, stakeholders in marine ventures will be scrutinising the steps taken by owners to ensure their vessel is cyber secure.

In order to evaluate the current situation in the industry, we have engaged Thetius – an independent technology research organisation – to carry out a Maritime Cyber Risk Survey on behalf of HFW and CyberOwl. This research is intended to create a global industry-first report on the status of cyber risk in the maritime industry, a year after IMO Resolution MSC.428(98) came into effect, and also looks at the level and extent of respondents’ cyber risk insurance cover. If you would like to participate in the survey, please follow this link: https://lnkd.in/dwSmv_xi. Additionally, if you would like to sign up for a copy of the report and findings then please enter your details separately here: <https://lnkd.in/dwvC5mDT>

The question to ask within your organisation is not “Are you really cyber secure?” but “Are you really ready to answer questions about your cyber security?”

¹ Alize 1954 & Anor v Allianz Elementar Versicherungs AG & Ors [2019] EWHC 481(Admty)

² Alize 1954 & Anor v Allianz Elementar Versicherungs AG & Ors [2021] UKSC 51



PAUL DEAN
Partner, London
E paul.dean@hfw.com



TOM WALTERS
Partner, London
E tom.walters@hfw.com



HENRY CLACK
Associate, London
E henry.clack@hfw.com



RUTH ALLAN DE MALDONADO
Professional Support Lawyer, London
E ruth.allandemaldonado@hfw.com

MOVING AHEAD

THE UK CHAMBER HAS BEEN WORKING TO ENSURE THAT SEAFARERS CONTINUE TO HAVE FREEDOM OF MOVEMENT IN A POST-PANDEMIC AND POST-BREXIT LANDSCAPE.

Tim Springett, Policy Director - Employment and Legal and Melanie White, Policy Advisor - Employment

THE MARITIME LANDSCAPE – PARTICULARLY IN THE UK – IS EXPERIENCING CONSIDERABLE CHANGE AND CHALLENGE.

Two years into the pandemic, the supply chain is increasingly fragile as ongoing issues of heightened border restrictions and the crew change crisis continue to be of concern. This dovetailed with worries that Brexit would affect the employment landscape since the beginning of 2021 marked the end of free movement for nationals of EEA member state to the UK.

The UK Chamber of Shipping worked hard to minimise the risk posed by both threats. Our team liaised with the government and ensured that nationals from EEA states who had not taken up residence in the UK and hold frontier worker permits could continue to work within shipping. As a result,

scheduled domestic ferry and ro-ro services, such as those between Great Britain and Northern Ireland, have continued to function with little or no change, allowing supply chains to continue unhindered. Given the shortages of HGV drivers towards the end of the year, this could have severely impacted UK trade.

We have also continued to work hard on behalf of seafarers who continue to face difficult working conditions as a result of the ongoing Covid pandemic. Despite two years having passed, the uncertainty that crew members face with regard to access to crew changes, vaccinations and other issues is far from over. This problem was particularly evident towards the end of the year when national maritime authorities reinstated tightened border restrictions and barriers to crew change to tackle the spread of the Omicron





ALONGSIDE ADVOCATING FOR KEYWORKER STATUS AND FREEDOM OF MOVEMENT, THE UK CHAMBER HAS PRIORITISED ASSURED VACCINE ACCESS AND APPROPRIATE CERTIFICATION TO PROVE VACCINATIONS FOR SEAFARERS.

variant. The closing of various boundaries placed an inordinate amount of stress on crew members and their loved ones, many of whom had been similarly affected by the turmoil of the crew change crisis of 2020.

The UK Chamber of Shipping continues its commitment to ensuring that seafarers are recognised as key workers so that they are exempted from travel restrictions. The ability of seafarers to join vessels, rest during shore leave and then be repatriated to their home countries is essential to ensuring that they can do their jobs and transport food, medicines, and other goods around the globe.

In April 2021, the Chamber participated in the Fourth Meeting of the Special Tripartite Committee of the Maritime Labour Convention (MLC) with the International Labour Organization (ILO), where shipowners, seafarers and representatives from over

100 countries were present. Attendees adopted a resolution recognising that seafarers are key workers, must be permitted repatriation in accordance with their contracts, and exempted from travel restrictions. They must also be granted prompt access to medical care when needed in ports of call. In 2022 there will be a further meeting of the ILO's Special Tripartite Committee at which proposed amendments to the MLC 2006 will be considered to provide stronger guarantees of these seafarer rights.

Alongside advocating for keyworker status and freedom of movement, the UK Chamber has prioritised assured vaccine access and appropriate certification to prove vaccinations for seafarers. Although the Chamber recognises the rights of individuals to make decisions on whether or not to be vaccinated, there is strong anecdotal evidence that seafarers who have not been

vaccinated, or whose vaccination records are not recognised by authorities, face considerable obstacles when attempting to leave ships.

There have been a number of instances in which seafarers have received vaccines but the procedure has not been documented properly. Without adequate proof that crew members have received an internationally recognised vaccine, these individuals are not formally recognised as having been vaccinated and may face onerous quarantine – and other – restrictions.

In order to rectify this potentially parlous situation, the UK Chamber is advocating for an industry-wide

acceptable international proof of vaccination. This must be dealt with as a priority as the vaccination landscape is likely to become more complicated as more governments require booster doses to maintain safety and to mitigate the effects of future variants. Furthermore, booster doses may officially change what constitutes fully vaccinated status for seafarers, consequently changing the documentation required for crew. It is therefore vital that adequate provisions are made available, and that free movement and supply chains continue unhindered.

The uncertainty around access to hurdle-free travel, access to shore leave, guaranteed medical

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THE INCREASED IMPLEMENTATION OF MENTAL HEALTH POLICIES WILL LIKELY INCREASE THE ATTRACTIVENESS OF SHIPPING AS A CAREER, INCREASING RECRUITMENT AND RETENTION POSSIBILITIES FOR COMPANIES INVESTED IN SEAFARER WELFARE.



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care and proof of vaccination are some of a number of issues impacting seafarer mental health and well-being. Working alongside the National Union of Rail, Maritime and Transport Workers (RMT) and Nautilus International as part of the National Maritime Occupational Health and Safety Committee, the Chamber contributed to and launched 'Practical Guidance for Shipping Companies on Improving Mental Wellbeing' in March 2021. These practical guidelines offer useful suggestions that companies can use to ensure the mental health and wellbeing of seafarers.

The response to this information has been very positive, and we have seen increased interest from member companies who would like to maintain well-being onboard. We will continue to focus on this area in 2022, and are already in discussion with European

Community Shipowners' Associations (ECSA) to organise a joint workshop on seafarer mental health to share information regarding our approaches to seafarer mental health.

The increased implementation of mental health policies will likely increase the attractiveness of shipping as a career, increasing recruitment and retention possibilities for companies invested in seafarer welfare – which is extremely important given the negative reputational impact that the pandemic has had on shipping as a career. In particular, the industry must work to draw the attention of the younger generation who are integral to helping our industry achieve our future goals.

The Maritime Skills Commission (MSC) published a report in June of 2021, outlining 23 recommendations by an ad hoc working group on cadet training that are



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likely to have major implications for training. Cadet programmes must balance training in new skills that address emerging and future needs (particularly increased digitisation onboard vessels and ensuring shipping's decarbonisation targets) against skills with decreasing relevance.

As the Chamber not only represents companies that train the seafarers of the future, but employs the seafarers themselves, our workshop in early 2022 provided an ideal platform for members to discuss industry requirements and reach a common view on what future skills and training must comprise, alongside a practical method of effective delivery. We will shortly be in a position to put our own proposals before the UK Government.

We are also continuing our work on safety culture. Although our 2020 safety culture conference was cancelled as a result of the pandemic, members were able to attend a two day online event in 2021 which focused on how good safety culture made good business sense. The collaborative attitude by attendees sparked a number of interesting approaches on how best to instil health and safety practices in company workforces. Our 2022 conference will build on this progress by looking at leadership and the role of the CEO in instilling safety culture.

We look forward to working with all UK Chamber of Shipping members over the coming year and building back better, safer and more efficiently.

IN PARTICULAR, THE INDUSTRY MUST WORK TO DRAW THE ATTENTION OF THE YOUNGER GENERATION WHO ARE INTEGRAL TO HELPING OUR INDUSTRY ACHIEVE OUR FUTURE GOALS.



Photo: ICS StenaLine



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CULTIVATING RELATIONSHIPS

STRONG RELATIONSHIPS WITH EXISTING AND NEW TRADING PARTNERS ARE KEY TO A POST-BREXIT AND POST-PANDEMIC OPERATING LANDSCAPE

Gavin Simmonds, Policy Director - Commercial

THE UK CHAMBER OF SHIPPING HAS ACTIVELY BEEN ADDRESSING THE ONGOING CHANGES TO THE OPERATING LANDSCAPE AS A RESULT OF BREXIT AND COVID, WHICH HAVE NECESSITATED PROMPT AND AGILE RESPONSES FROM GOVERNMENT AND INDUSTRY.

Our international trade forum has been extremely active over the past year to navigate a number of fast-moving challenges and enhance UK resilience.

Brexit has allowed for our existing trade relationships with the EU to shift towards new free trade agreements (FTAs) with a number of non-European countries such as the United States, Australia, New Zealand, Canada, Japan, Mexico, the Gulf Co-operation States, and the CPTPP. Members of

the UK Chamber of Shipping have shown immense initiative in taking on the opportunity to either expand on existing trade relationships or develop new ones in markets that were felt to be restricted or underexplored.

These new FTAs make it possible for us to build stronger relationships with other maritime nations with whom we have long trading histories. Diversification and growth in international maritime trading services benefits us as well as global communities, and allows the UK to demonstrate a wider commitment to international logistics and commodities.

This broadening of scope also enables us to offer



Photo: Andrew Sassoli-Walker



WE ARE ALREADY SEEING AN INCREASED DEMAND FOR SHIPPING SERVICES AND THE UK CHAMBER OF SHIPPING HAS BEEN WORKING HARD TO ASSIST OUR MEMBERS IN MEETING THESE NEEDS.

existing and incoming trade partners further improvement in conditions that are harmonious with their national plan as well as our own. We have seen countries such as Australia, the United States, and New Zealand already gaining from the processes of these renegotiations, and the growth in our own maritime and offshore sectors speaks to reciprocal benefits.

India is also a key market for our trade partnerships with a rapidly expanding economy and a significant location for access to Asian markets. With a large upwardly mobile population, the demand for UK skill sets and business partnerships is rising and offers mutual advantages for trade.

A big advantage that the UK is able to offer in international partnerships is our knowledge and skills with renewables, which is a vital commodity for export in the age of decarbonisation. We have considerable experience of generating and managing offshore domestic energy (including windfarms), making us industry leaders in the global effort towards sustainability.

There are real opportunities at hand to export these skills and capacities, with the benefit of enhancing global efforts to combat climate change. Industry commitments, such as the Clydebank Declaration at COP26 that seeks to establish six green corridors (or zero-emission routes) by 2025, will benefit from

the establishment of these partnerships along both the supply chain and the operational value chain. We are already seeing a demand for our expertise that is likely to grow in coming years in line with an increased focus on sustainable green operations.

Building these stronger connections come at an opportune time, as - with existing measures in place to address the continued effects of the pandemic - industry leaders within the UK are now shifting focus from managing effects on the supply chain to refining and improving the logistics and trade processes. We are already seeing an increased demand for shipping

services and the UK Chamber of Shipping has been working hard to assist our members in meeting these needs. Every effort must be made to provide a level of efficiency which reduces cost while providing a quality of service which meets demand and ensures satisfaction within the trade relationship.

We are about to enter the second stage of customs transition following Brexit, which involves new import and export controls. These rules involve particularly technical measures governing reporting origin requirements, such as the new UK-EU Trade and Co-operation Agreement (TCA) which came into full

Setting the standard



effect as of 31 January 2022. Additionally, there will be sanitary and phytosanitary checks for certain types of cargo. The industry will need ongoing support for reliable compliance and we are committed to ensuring that this is available to our members.

We are fully engaged and will continue to represent the interest of our members in the joint customs consultative committee (JCCC) and its sub-groups. I encourage members who have continuing concerns to bring these up during our regular member interactions such that they can be addressed by the Chamber's working group.

The UK Chamber of Shipping has also offered considerable input into the complex technical negotiations for the forthcoming customs requirements that will come into full effect in July 2022. We are working closely with Her Majesty's Revenue and Customs (HMRC) on a continuing programme of

webinars and other resources to introduce information regarding these changes.

There are, of course, other challenges that must also be overcome. If we are to meet increased demand for shipping services, our sector must tackle service disruptions and port congestion impacting the industry. These not only impact inland trade services but also impairs our ability to meet industry commitments to decarbonise and reduce fuel use. There is a clear need for improved communication between ports and shipping lines in order to reduce the number of vessels waiting – and the UK Chamber of Shipping is assisting our members with creating systems that work for them.

It should be noted that even with efforts to reduce port congestion and facilitate just-in-time arrival, the resilience of the maritime supply chain is likely to be tested over the coming year or so. New stress points

THE UK CHAMBER OF SHIPPING HAS ALSO OFFERED CONSIDERABLE INPUT INTO THE COMPLEX TECHNICAL NEGOTIATIONS FOR THE FORTHCOMING CUSTOMS REQUIREMENTS THAT WILL COME INTO FULL EFFECT IN JULY 2022.



Photo: Andrew Sassoi-Walker

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WE BELIEVE THAT BETTER DATAFLOW AND INCREASED IT EXCHANGE COULD ALLOW FOR GREATER UNDERSTANDING OF WHAT IS BEING CARRIED ON SHIPS.

may emerge if there are new variants, and there is always the possibility that shipping will experience unforeseen events - such as the Ever Given containership incident in the Suez Canal in March 2021. The supply chain is tightly connected, and as we improve efficiencies, this brings about additional risk that individual disruptions will have knock-on consequences for the industry as a whole.

Improved communication and closer international relationships are the best means to tackle these threats, and the UK Chamber of Shipping is ideally placed to facilitate these and improve national resilience. We believe that better dataflow and increased IT exchange could allow for greater understanding of what is being carried on ships. This would

grant our members the agility needed to utilise other supply options when the supply chain experiences disruption or comes to a halt.

Our Secretariat is working closely with our members to assess national priorities when it comes to the delivery of goods and commodities and to liaise with the government to ensure minimal fallout and maximum efficiency. The UK is not the only country to have a wary eye on a fragile supply chain that has seen a long and hard year, and our global trade partners - as well as industry leaders as a whole - are aware of the risks. We must ensure that a global effort is made to sustain services and systems. After all, we are all in this together and must tackle it in a collaborative manner.



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REGAINING MOMENTUM

MNTB INITIATIVES SUCH AS THE BERTH POOL AND ONLINE TRAINING ARE HELPING CADETS GAIN THE EXPERIENCE THEY NEED TO PROPEL THE MARITIME SECTOR FORWARD.

Kathryn Neilson, Director - Merchant Navy Training Board (MNTB)



Photo: ICS

THE ONGOING COVID PANDEMIC CONTINUES TO POSE A SERIOUS CHALLENGE TO CADET TRAINING AS IT HAS PREVENTED MANY CADETS FROM ACCESSING ONBOARD TRAINING. Not only has it forced young cadets to undertake a front-loaded version of the regular training programme, but it has compounded the issue of a growing backlog of cadets who have still not gained access to a training berth on a ship despite being on the waiting list for a while.

At the Merchant Navy Training Board (MNTB), we know the value of hands-on experience, which is vital to cement the underpinning knowledge delivered in the classroom which then translates into real world behaviour. Our cadets need onboard training to ensure that their skills are demonstrated at a level that will make them competent and competitive in an

international maritime market. Furthermore, the longer students wait to get a job after completing their training, the higher the risk that they find other jobs outside the sector and leave maritime altogether. This is the reason we have focused and continue to focus our efforts to secure additional berths in 2022 to ensure our UK cadets can get the sea time they need.

In late 2020, the MNTB established the Berth Pool as a tool to address the shortage of training berths. The pool works by reaching out to companies to ask them to come forward with any spare berths on their vessels. Available berths are prioritised for those students with no time at sea and the remainder are allocated in order of importance. I'm proud to say that we have sent over 65 students to sea thus far and in fact, some of these students have been offered

permanent roles once they finished their training – the advantage being the companies are benefitting from this scheme as they can evaluate the cadet before hiring them.

We are now seeing a light at the end of the tunnel as companies are allowing students to go back on board. Alongside the Berth Pool initiative, the MNTB and the UK Chamber of Shipping also lobbied the UK Government to request more funding to support companies that were sponsoring cadets through their training at this challenging time. Our request was successful and this will now provide financial support to companies whose cadets have had to extend their training due to Covid.

We know how important it is for students to receive support with their training, not just from an educative standpoint but also from a mental health perspective. This was particularly demonstrated in May and June 2021, when issues with access to crew changes internationally meant that companies could not allow students onboard. Demand for berths spiked and knowing that we were on the case was a relief to many cadets.

There is no set end-date for the Berth Pool programme, particularly as we are not out of the woods yet and may see the number of students on the waiting list grow again if we have another Covid surge or variant. Given our expectation that the

OUR CADETS NEED ONBOARD TRAINING TO ENSURE THAT THEIR SKILLS ARE DEMONSTRATED AT A LEVEL THAT WILL MAKE THEM COMPETENT AND COMPETITIVE IN AN INTERNATIONAL MARITIME MARKET.

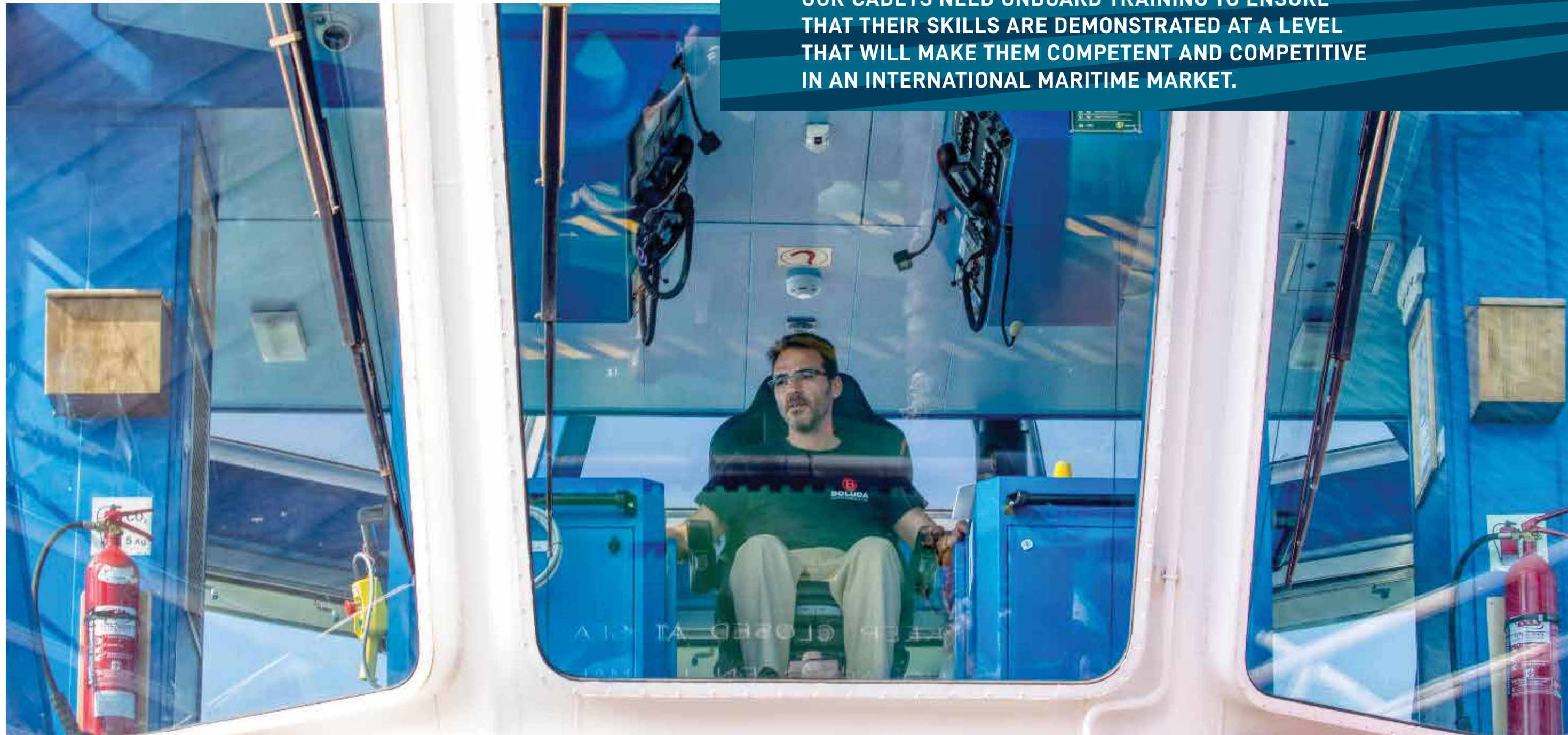


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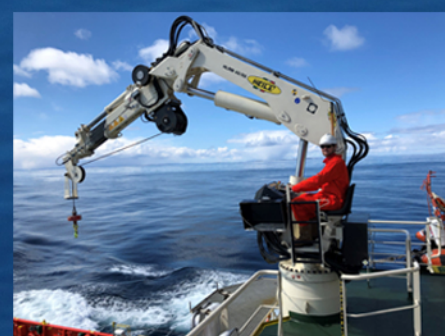


Photo: ICS CSMART Academy Bridge Simulator

WE WILL CONTINUE TO INVEST IN DIGITAL TRAINING IN THE FUTURE, WHILE MAINTAINING STANDARDS IN AREAS WHERE PHYSICAL TRAINING IS A NECESSITY.

pandemic will continue to be an issue in the next few years, the MNTB is implementing the lessons learned so far. This attitude will serve us well if we have to navigate other emergencies in the future.

A particularly valuable lesson is that much of the maritime training programme can be delivered online, particularly online assessments and exams. Seeing the number of students carrying on with their training despite the pandemic has been really heartening and I particularly praise the Maritime Training establishments who moved training to an online platform to ensure cadets were able to continue

their training despite the restrictions in place. We will continue to invest in digital training in the future, while maintaining standards in areas where physical training is a necessity.

It is vital that students receive additional support when training online as this form of delivery can present challenges if students are not familiar with it. We must also consider digital poverty, particularly for young students who cannot afford the hardware or software to continue their training. Despite excellent support from the colleges to ensure their students had access to computers and the

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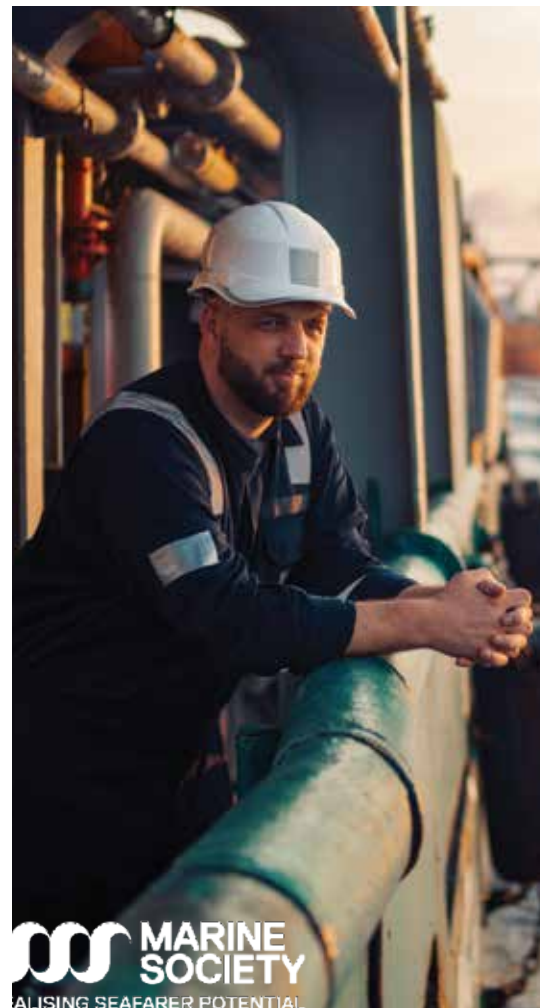
internet, many students were badly impacted in the first six to eight months of the pandemic due to digital poverty.

The drop in cadet numbers that we have witnessed in the last 18 months due to Covid will undoubtedly have an impact on future recruitment and we will need to work hard to ensure that there are enough appropriately trained seafarers to crew the vessels of the future. While the online aspect does increase the likelihood that younger seafarers will be digital natives, this benefit is set against the fact that many students are reluctant to begin a course online. Additionally, the pandemic has raised the profile of seafaring as a career, but there remains a huge amount of negativity around the struggles relating to delayed crew changes and cancelled shore leave, which is giving our sector a poor reputation as a

workplace. When faced with so much uncertainty, students may choose to follow careers in other sectors. In combination with a fatigued workforce that has been kept onboard far beyond the contracted time period, we could see real safety risks for the industry.

The MNTB is exploring all options to increase resilience and we are working hard with the MCA on the review of seafarer training and education, which will be updated by September 2023. This will make the seafarer education and training programmes far more relevant for the next 20-30 years as it will include elements such as green skills, digital learning, and better leadership and management skills. We are keen to work with all our stakeholders to ensure that our industry and its seafarers are able to operate safely, efficiently and competitively.

WE WILL NEED TO WORK HARD TO ENSURE THAT THERE ARE ENOUGH APPROPRIATELY TRAINED SEAFARERS TO CREW THE VESSELS OF THE FUTURE.



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Photo: Viking Maritime - Chiltern Director awarding a cadet

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SHIPPING BY NUMBERS

THE SHIPPING INDUSTRY MAKES A SIGNIFICANT CONTRIBUTION TO THE UK

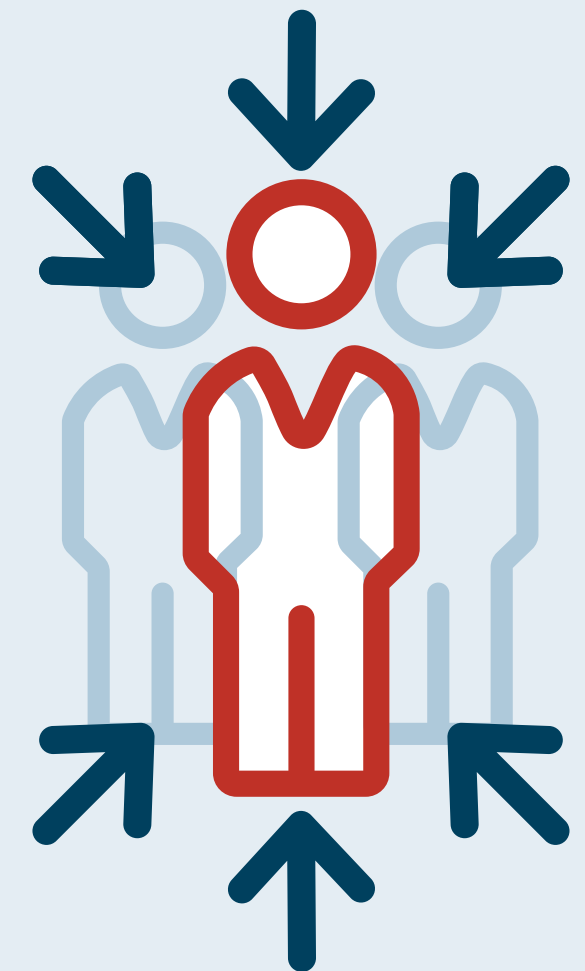
181,300 JOBS



SHIPPING INDUSTRY CONTRIBUTED AN ESTIMATED

£927m

IN TAX REVENUES IN 2017



"WE HAVE STRENGTHENED OUR RELATIONSHIPS WITH DEPARTMENTS ACROSS WHITEHALL, MEANING WE CAN FEED BACK INFORMATION IN A TIMELY FASHION AND LOBBY ON BEHALF OF OUR MEMBERS MORE EFFECTIVELY."

Sarah Treseder, UK Chamber of Shipping Chief Executive



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Robert Courts, UK Government Shipping Minister



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IN GROSS
VALUE
ADDED

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IN 2017 VALUED AT

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£18.9bn

IN BUSINESS TURNOVER

TOP 5s

ISSUES IMPORTANT TO THE MEMBERS' BUSINESS:

- SAFETY
- ENVIRONMENT
- BREXIT
- LEGISLATION
- TECHNOLOGICAL DEVELOPMENTS

MOST VALUABLE CHAMBER MEMBERSHIP BENEFITS:

- COMMITTEE AND PANEL MEETINGS
- LOBBYING AND REPRESENTATION
- POLICY BRIEFINGS AND CIRCULARS
- CHAMBER EVENTS
- DAILY BRIEFINGS/ WEEKLY BULLETIN

POLICY ROUND-UP

FROM THE LAUNCH OF NEW GUIDANCE TO THE RETURN OF INTERNATIONAL CRUISE, THE UK CHAMBER IS ALWAYS LOOKING TO GET THE BEST DEAL FOR THE INDUSTRY

OFFSHORE RENEWABLES – CHAMBER SECURES CONCESSIONS

The waters around the British Isles and UK Exclusive Economic Zone are leading the world globally in the development of offshore renewable energy, and targets set by UK Government for deployment of 40GW of offshore wind by 2030 could see in the region of 8,000 wind turbines built offshore.

The inevitable result of reduced sea room focuses the need to safeguard navigational safety to protect crews, vessels and their cargoes from undue, excessive or risk elevating deviation, and not stymie future growth in shipping and navigational routes. The UK Chamber of Shipping continues to work diligently and constructively with developers of offshore renewable developments (wind, tidal, wave) and collaboratively with the MCA, Trinity House, Crown Estate, RYA and others.

As the number of developments going through planning increase, so too does the opportunity for conflict, and the Chamber secured two major concessions from offshore renewable developers in 2021.

Hornsea Four, the fourth part of the Hornsea complex being built east of the Humber in the North Sea, has significantly reduced its Red Line Boundary

application to the Planning Inspectorate following lobbying efforts lead by the Chamber and with support from other maritime stakeholders, protecting vitally important internationally scheduled Ro-Ro services from significant deviation and delay. The concessions gained mean schedules can be retained and trade routes to the continent which are over 150 years old can be maintained.

The UK Chamber of Shipping also saw major concessions in the Irish Sea with the Morlais Tidal Project introducing zonal areas with minimum under-keel clearances which protect the safe navigation of UK to Eire Ro-Ro shipping routes, whilst also enabling the project to proceed.

The UK Chamber of Shipping welcomes and supports the proliferation of offshore renewables to decarbonise the UK, but calls for precaution and safeguarding of navigational safety and existing marine users.

LAUNCH OF THE SECOND EDITION OF THE PILOTS' POCKET GUIDE & CHECKLIST

The British Tugowners Association in conjunction with the UK Maritime Pilots' Association is pleased to launch the second edition of the Pilots' Pocket Guide and Checklist via Witherby Seamanship.





Photo: Andrew Sassoli-Walker

THE BRITISH TUGOWNERS ASSOCIATION AND OTHER MEMBERS OF THE SMALL VESSEL FRATERNITY STRONGLY WELCOMED THE APPROVAL FOR DELIVERY OF THE OFFICER OF THE WATCH <500GT NEAR COASTAL APPRENTICESHIP IN AUTUMN 2021.

Harbour towage is a potentially hazardous business and should not be undertaken unless there has been a proper assessment of the risks involved. Good communication by all parties, proper planning with an understanding of what can go wrong, and good seamanship are critical in ensuring that the risks are minimised. Thorough training and appropriate experience are also essential in ensuring that the professionals involved are competent. To assist in this process, this guide aims to support pilots and PEC holders in their daily tasks. It draws on industry best practice and uses checklists, coupled with guidance, to provide a handy pocket aide memoire for those responsible for directing tugs during harbour towage.

The second edition introduces a range of new content, including:

- Greater emphasis on development of the pilotage plan for shared mental model between all crews
- Improved two-stage checklists
- Vessel familiarisation and liaison groupings

- Closed-Loop Communications to protect against false mutual understandings for safety critical information
- Value of briefings and de-briefings (work as done as compared to work as imagined)
- Breaking down best practice by period of operation, eg Pre-Arrival or Making Fast and Manoeuvre
- Correct reporting of dangerously weighted heaving lines
- Importance of tow points and the risk of girting

RELEASE OF NEW GUIDANCE ON TOW ROPES

The tow rope is the single most essential piece of equipment in the towage industry, providing the vital link between tug and tow, yet the British Tugowners Association found that the understanding of tow ropes, their capabilities and characteristics is not an exact science and historically the industry has followed the adage, 'bigger is better'. The guidance dispels that myth and introduces a methodical framework for operators and rope manufacturers

to use together to facilitate an informed discussion examining operational, environmental, and technical characteristics to find the optimal towing solution.

The cheapest rope is rarely the most affordable suitable rope in the real world, and purchasing choices appropriate for one vessel may be entirely unsuitable for another. The guidance aims to improve tow rope understanding and enhance safety by providing those involved in purchasing decisions with the ability to ask the right questions and seek quantitative answers from vendors and their colleagues at sea. The guidance also seeks to harmonise the language we use to describe the characteristics of a tow rope and the way information is recorded over the rope's lifespan.

APPROVAL OF NEW APPRENTICESHIP FOR RESTRICTED VESSEL SECTOR

The British Tugowners Association and other members of the small vessel fraternity strongly welcomed the approval for delivery of the Officer of the Watch <500gt Near Coastal apprenticeship in Autumn 2021. Restricted STCW certification, receiving no meaningful funding from SMarT or elsewhere, has long called for funded training pathways, and the OOW apprenticeship represents the start of this.

The trailblazer group, chaired by BTA and Chamber members Serco, is heartened by the approval in September 2021 of the Officer of the Watch <500gt Near Coastal apprenticeship. The apprenticeship, which has been given a funding band of £15,000 will

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provide a sorely needed funded training route to STCW certification for tugs, workboats, Border Force, yachts and the Royal Navy. Through a route which caters for a variety of sectors, there will be safety in numbers meaning greater security for training providers to offer the course.

It is hoped that further apprenticeships will follow with the submission to the IfA of the Small Vessel Engineer application in January 2022 for, hopefully, delivery Q2 2022, and the establishment of a Master <500gt Near Coastal trailblazer group getting development underway there.

DEPARTURE FROM THE EU

Google Trends is a tool for understanding the relative evolving interest in a particular search item. It then provides a benchmark with 100 denoting a week with the most searches on a topic. An examination of the term 'Brexit' results in the graph below. Clearly, public interest has fallen considerably in 2021.

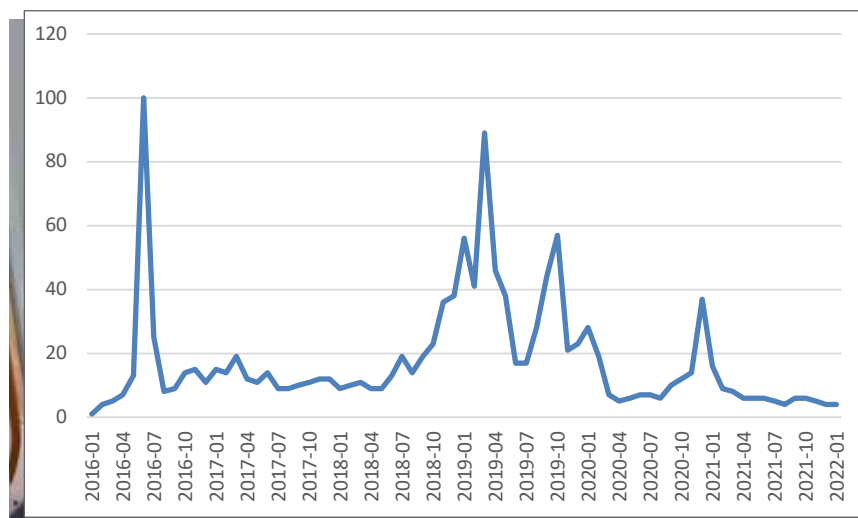
But this disinterest is not so for the Chamber. While the UK has officially left the EU, many of the effects of the departure in respect to custom controls were only been implemented on 1 January 2022. Therefore, Chamber members have been heavily involved in preparing for the changes throughout the

last twelve months. The Chamber's Custom Working Group have met weekly throughout Q4 2021, discussing with senior government officials on all aspects of import and export controls. Such discussions have led to significant policy changes, such as availability of custom control optionality to all modal types, the simplification of the movement of empty freight units, and provision of contingency arrangements to support operators.

Such focused consideration has paid off. The policy changes made are pragmatic and address the key concerns of Chamber members and their ability to provide essential services for the UK economy. If the flow of goods was unimpeded in the early weeks of 2022, it is testament to the hard work of UK Chamber members.

And the work will continue into 2022. The 1st July 2022 will see the introduction of safety and security declarations for products of animal and plant origin and the full-operationalisation of Border Control Posts. And while the changes introduced on 1 January 2022 and in July are supported by the Chamber, they still represent a sub-optimal system for managing the import and export of goods into and from the UK. While 21st century techniques are used to process the data, the principles of the custom controls being

Photo: ICS Guests gather at evening reception for Shaping The Future of Shipping Conference



WHILE THE CHANGES INTRODUCED ON 1 JANUARY 2022 AND IN JULY ARE SUPPORTED BY THE CHAMBER, THEY STILL REPRESENT A SUB-OPTIMAL SYSTEM FOR MANAGING THE IMPORT AND EXPORT OF GOODS INTO AND FROM THE UK.



SHIPPING'S 4th PROPULSION REVOLUTION – THE COMMITMENT AND THE CHALLENGE

Moderator
 **Rt. Hon. Nusrat Ghani**
 MP, United Kingdom

Panel

 **Christine Cabau Woehrel**
 CEO CMA Ships and Head of Fleets and Assets,
 CMA CGM, France

 **Rolf Habben Jansen**
 CEO, Hapag-Lloyd,
 Germany

 **Vandita Pant**
 Chief Commercial Officer,
 BHP, Singapore

 **Vassilios Demetriades**
 Shipping Deputy Minister,
 Republic of Cyprus

 **Knut Ørbeck-Nilssen**
 CEO, DNV - Maritime,
 Germany

 **Svein Steimler**
 President and CEO, NYK Group Ltd, Europe,
 Managing Executive Officer, NYK Group, Japan

Photo: ICS

AT THE CHAMBER WE ARE ALWAYS LOOKING FOR NEW WAYS TO BUILD CONSENSUS ACROSS THE SHIPPING COMMUNITY.



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introduced are essentially 19th century in their formation. To fully modernise the control of trade, the redefining of this principle is required.

The Government's Future Borders strategy is one step in this redefinition, and the Chamber is contributing to various aspects of the strategy which will ensure the actions at the border are beneficial for both industry and the UK economy. In addition to preparations for July 2022, these border modernisations will become increasingly significant in the promotion of trade, and while searches on Google may not increase, the hard work of Chamber members will continue to deliver benefit for the UK. **2016-17.5, 2017-9.9, 2018-14, 2019-32, 2020-10, 2021-5**

M7 EVENT

At the Chamber we are always looking for new ways to build consensus across the shipping community and in June last year we were delighted to see so many colleagues from around the world join us as we

hosted the first ever M7 event.

The M7 was a new forum for the national ship owning associations of the G7 members. To match the invitation list for last year's G7 we extended the invitation to Australia, India, South Africa and South Korea. The Secretary General of the International Chamber of Shipping Guy Platten, Chief Executive and Secretary General of BIMCO David Loosely and a representative from ECSA also joined the meeting.

During the two-hour virtual meeting Chaired by our President John Denholm, delegates discussed issues around digitalising documents to speed up trade, green R&D projects, the crew change crisis and seafarer vaccinations. There was agreement across all nations that more investment is needed from governments and industry to develop the technologies for a cleaner and greener shipping industry. It was an incredibly useful event and we look forward to it being continued by our G7 partners in the years to come.

FERRY AND CRUISE

A key role the Chamber plays is representing the views of our members to government. We are here to lobby on behalf of the industry and that is exactly what we have been doing with our ferry and cruise members. At the beginning of Covid we secured a support package for our ferry companies to ensure freight could continue to flow into the country.

But for our cruise members, we had to wait far longer for the government to allow the cruise sector to resume sailing but after 16 months of pressure, lobbying and hundreds of meetings, the government finally confirmed at the beginning of August that international cruises could restart from England.

Domestic cruises had successfully run from May, but international cruises had been prohibited.

The Chamber developed new protocols to ensure the health and wellbeing of passengers and crew, making it the safest environment in the travel and hospitality sectors and our framework was even recognised by the UN. Throughout the process we worked incredibly closely with our members, CLIA and

the wider cruise sector, demonstrating the strength of the collective when lobbying government.

OFFSHORE VESSELS AND RIGS: OFFSHORE PANEL AND THE BRITISH RIG OWNERS' ASSOCIATION (BROA)

2021 continued to present difficult trading and operational conditions for both offshore vessels and rigs. This was largely because of the impact of the Covid pandemic on crew changes and energy demand, especially in the first half of 2021. As Western economies opened up in the latter part of 2021, energy demand and prices shot up – but the arrival of Covid variants contributed greatly to price volatility. Critical policy developments for rig owners included enabling seafarers and offshore workers to travel, and the resumption of UK HSE inspection activity, as North Sea activity also picked up. Regulatory issues that BROA has engaged with include helideck regulation, GHG emissions, lifeboat drills and the maintenance/verification of safety and environmentally critical elements. For the UK Chamber's Offshore Panel, policy priorities this year

have included developments on new ship construction/operational standards for the carriage of industrial personnel, crew changes, UK marine content in offshore wind, trade access, and offshore vessel GHG emissions.

LONDON INTERNATIONAL SHIPPING WEEK

London International Shipping Week was a week full of wonderful events and great discussions and debate about the future of our industry.

The Chamber worked incredibly hard over many months with HM Treasury, DP World and Forth Ports for the official launch of Thames Freeport at an event at the Savoy Hotel in London. We were honoured to have both the Chancellor of the Exchequer and the Transport Secretary attend the event with Rishi Sunak making the keynote speech.

SEAFARER VACCINATION

Protecting seafarers has been a constant theme of the last 18 months and last summer the UK Chamber of Shipping wrote to the Health Secretary and Transport Secretary asking them to do what they can to ensure seafarers of all nationalities are vaccinated when in the UK. In response to pressure from the UK Chamber, the NHS issued vaccination guidance targeted at local health authorities specifically on seafarer vaccination and as such local ports and health services are readily vaccinating seafarers of all nationalities. We continue to push the government for excess supplies of vaccinations to be allotted to maritime – specific vaccination hubs to help ensure the global seafaring community are protected from Coronavirus.

CRITICAL POLICY DEVELOPMENTS FOR RIG OWNERS INCLUDED ENABLING SEAFARERS AND OFFSHORE WORKERS TO TRAVEL, AND THE RESUMPTION OF UK HSE INSPECTION ACTIVITY, AS NORTH SEA ACTIVITY ALSO PICKED UP.



Photo: ICS Invincible

YOUR CHAMBER MEMBERSHIP

SEE HOW THE UK CHAMBER WORKS ON YOUR BEHALF

MEMBERSHIP BENEFITS

The UK Chamber is the voice of British shipping – and, in an ever-changing world, it has never been more important for us to stand together.

Becoming a member will give you access to unrivalled policy expertise, a rapidly growing network of industry influencers, and a voice in government that simply could not be achieved alone.

We represent shipowners that have a corporate or operating base in the UK, across a wide range of sectors. Many professional organisations with a maritime interest, including legal and financial firms,

are also part of the UK Chamber membership. In addition, we offer associate membership to a wide range of companies that provide services to UK shipping, such as local shipping associations, P&I clubs, and recruitment and technology firms and in 2021 we launched our new Charity Membership category.

To arrange a meeting to discuss membership, please contact our membership and business development team: tjerome@ukchamberofshipping.com
T: +44 (0)20 4417 2835

The UK Chamber of Shipping is the trade association and voice of the UK shipping industry, with 200 members from across the maritime sector. We work with government, parliament, international organisations and others to champion and protect our members, and the contribution they make to the UK economy.



Photo: ICS

BENEFIT	FULL SHIPOWNER/OPERATOR MEMBERSHIP (INCLUDING OVERSEAS AND START-UP SHIPOWNER MEMBERS)	FULL PROFESSIONAL MEMBERSHIP	ASSOCIATE AND CHARITY MEMBERSHIP
Committee and panel membership	✓	✓	
Input to consultation responses	✓	✓	
Representations to government	✓	✓	
Policy development	✓	✓	
Technical events and seminars	✓	✓	✓
One-to-one advice	✓	✓	
Policy newsletters	✓	✓	✓
Topic-specific briefings	✓	✓	
Weekly Bulletin	✓	✓	✓
Access to member-only website content	✓	✓	✓
Library of committee and policy documents	✓	✓	✓
Free networking events	✓	✓	✓
Use of Chamber logo	✓	✓	✓
Opportunities to host and speak at events	✓	✓	✓
Listing on the member directory	✓	✓	✓
Certificate of membership	✓	✓	✓
Discount on UK Chamber Annual Dinner tickets	✓	✓	✓
Discounted rates for venue hire at 30 Park Street	✓	✓	✓

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Tom Strang

CHANGES AT THE CHAMBER

EXECUTIVE BOARD Graham Westgarth is replacing John Denholm as President of the UK Chamber of Shipping and JB Rae-Smith will become Vice-President.



COMMITTEES AND PANELS

Our Committees and Panels are chaired by leading experts from within the shipping industry. During the last 12 months we have seen a change in leadership in some of these:

FERRY AND CRUISE PANEL Donnacha O'Driscoll became the new Chair, replacing Les Stracey, and Louisa Bell became Vice-Chair.



SECURITY AND DEFENCE Karrie Trauth has replaced Sven Boss-Walker as Chair of the Security and Defence Committee.



FINANCE, AUDIT AND RISK COMMITTEE Robert Hockel has replaced Les Tracey as Chair of the Finance, Audit and Risk Committee.



CONTACT THE CHAMBER

THERE ARE MANY WAYS TO KEEP IN TOUCH

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Performance Relationships Transparency



Heidmar is the original pool manager specializing in tankers and is committed to Performance, Relationships and Transparency. With almost 40 years experience, Heidmar is dedicated to putting its Customer's interests first. Heidmar is diversifying into the dry bulk sector and technical services aiming to offer end-to-end service.

EFleetWatch, the first market-facing digital platform in the commercial management space, has been a pillar of Heidmar's brand, providing pool partners with access to all of the data that they require for their own reporting and monitoring of their vessels. EFleetWatch supports the important foundations of trust and transparency that we know our pool partners value, and that our relationships depend on.

EFleetWatch™



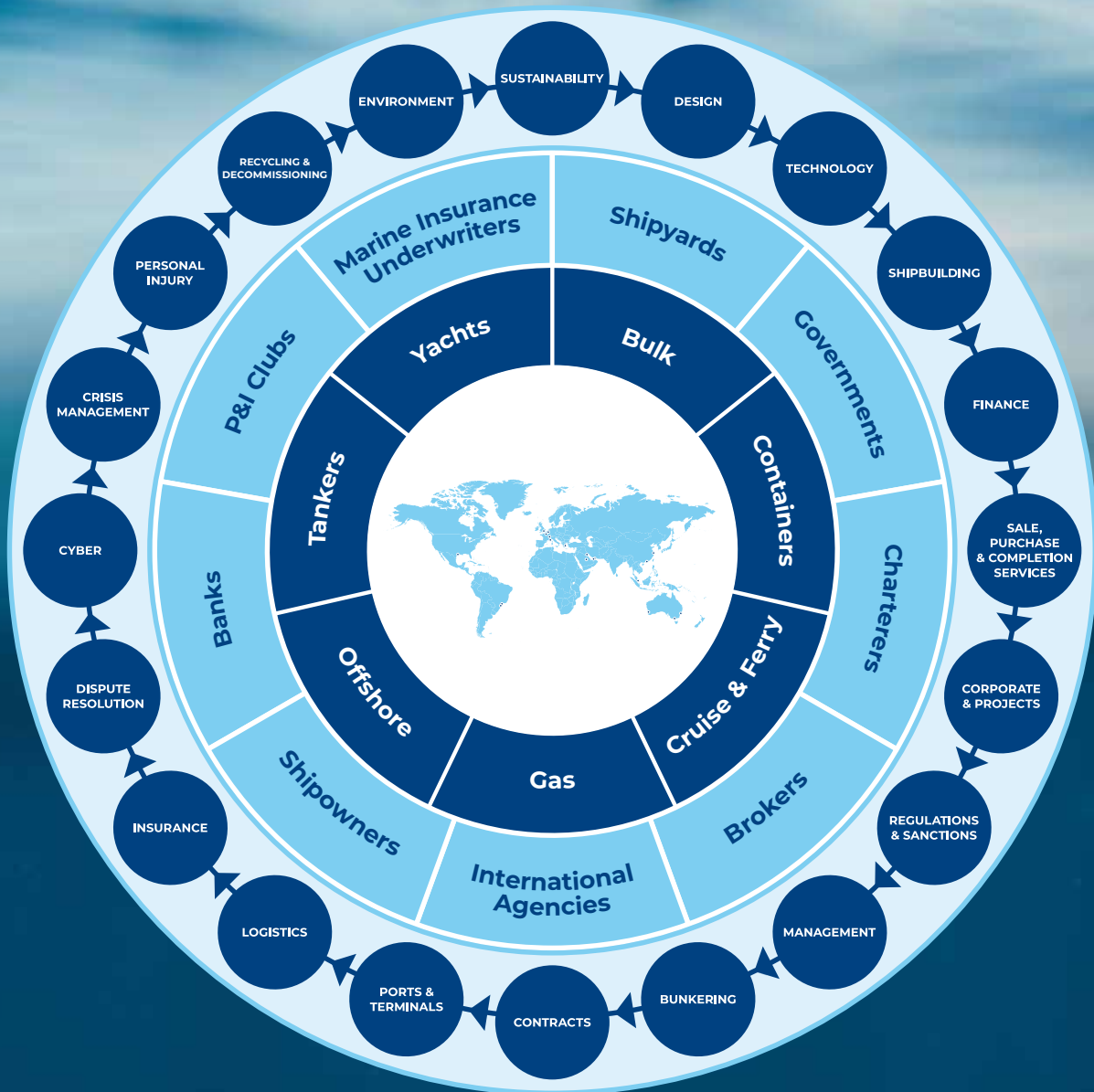
107, Vouliagmenis Avenue
 16674 Glyfada, Athens, Greece
 Tel: +30 2160 024 900

65 Chulia Street, #38-05
 OCBC Center Branch, Singapore 049513
 Tel: +65 6224 0115

Email: info@heidmar.com / www.heidmar.com



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