



SOCIAL IMPACT **REPORT**

Vessel-level insight into social impact for crew at sea, through the lens of ship inspection, technology and data business, Idwal.

Our reporting period for all findings in this report is:
14th April 2022 - 25th September 2023

Inspection Insight. Data Advantage.

IDWAL

Introduction

The maritime industry is improving its social responsibility efforts but lacks sufficient data and mechanisms to demonstrate comprehensive commitment to seafarer welfare, and this also poses challenges in assessing maritime commitments against Economic, Social and Governance (ESG) sustainability standards.

The maritime value chain hosts various ESG risks, and addressing seafarer welfare is crucial for sustainability and responsible business practices, showcasing commitment to ethical conduct and human rights.

Idwal is the ship inspection, technology and data business. It is the global leader in independent sale and purchase inspections and the industry's trusted partner for fleet condition monitoring. As such, Idwal surveyors are on a broad range of vessels every day and collect extensive data that can then be used to provide transparent and actionable insights into a vessel's maintenance, quality and ESG compliance, contextualised by the Idwal Grade®, the industry standard for measuring asset integrity.

Methodology

For this report, we chose to look at 5 main ship types: bulk carriers, containers, gas tankers, general cargo ships and tankers, inspected by us between the dates of 14 April 2022 and 25 September 2023. According to Equasis World Merchant Fleet Report 2022, the percentage of world fleet vessels (greater than 500 gt) inspected by Idwal for this report period are as follows: bulk carriers 8.8%; containers 4.4%; gas tankers 4.9%; general cargo ships 2.0% and other tankers 6.8%.

For the purpose of looking specifically at the social impact of on-board conditions on crew, and the company's alignment of ESG policies and seafarer welfare at the vessel level, Idwal's inspection methodology has been adapted and represented as the **Social Impact Score (SIS)**, using 50 existing data points from the regular inspections over ten key pillars called the **Idwal 10: Social Impact Pillars**. Surveyors collect data across the pillars and the Social Impact Scores generated are aggregated into an overall metric to benchmark and identify strengths, deficiencies and improvement opportunities against the 100% target.

The **SIS** provides an objective benchmark to drive continuous improvement across the industry and, over time, we hope this methodology will help integrate social factors into charter and insurance decisions.

Mind the (Social) Gap

Industry research tends to show a mixed response to seafarer wellbeing, with stakeholders expressing commitments to crew welfare, safety, diversity, and human rights but, in reality, implementation varies.

In contrast to often extensive standards and audits for onshore staff, social programmes for seafarers appear lacking in many cases.

A consistent social performance framework is essential to integrate seafarers into the ESG narrative and to uphold the industry's social responsibility. This ensures stakeholders align chartering, finance, insurance, and engagement with genuine social values reflective of seafarers' lives and work.

Objective assessment of alignment with ESG principles requires first-hand observation of working conditions at sea.

Idwal at a Glance

>45%

45% of all vessels sold in 2023 had an Idwal Report



>15%

More than 15% of the global fleet physically inspected since 2019



>15

15 inspection reports delivered every working day



~40,000

40k predictive Idwal Grades available for dry bulk, general cargo, tanker & container fleet



>10,000

More than 10,000 unique vessels inspected since 2019*



*More than 12,500 inspected in total

5

5 global offices: UK, Greece, China, Japan & Singapore



>100

100 countries in which an inspection has been conducted



>10m

10m data points, photos, documents collected from inspections

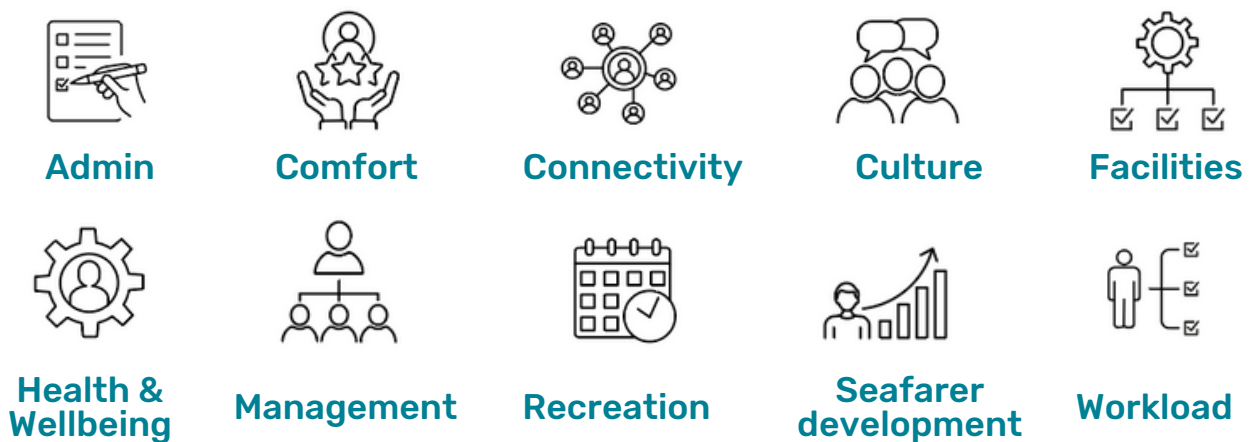


The Idwal 10: Social Impact Pillars

To translate crew welfare directly into the 'Social' elements of ESG, Idwal has developed a comprehensive social impact assessment based on 50 social welfare questions which are distilled into ten key welfare pillars to give us the the Idwal **Social Impact Score**.

The seafaring social pillars of ESG can be assessed through real-world on-board indicators such as clean, comfortable cabins, recreation opportunities, good nutrition, access to medical care, rest compliance, training, and diversity priorities.

Having assessed a range of company sustainability reports, we have categorised
The Idwal 10: Social Impact Pillars as:

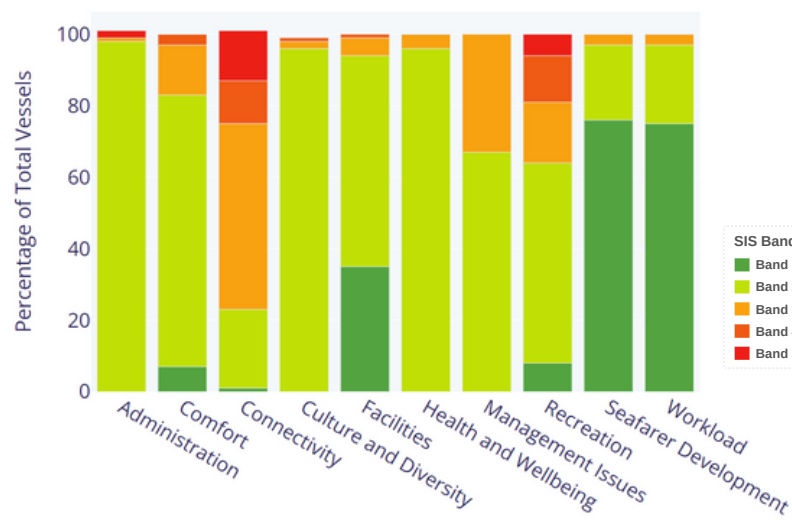


This framework encapsulates legal compliance, living quality, diversity, workload balance and growth opportunities. Vessels prioritising crew wellbeing through supportive policies and environments score higher, attracting and retaining skilled seafarers crucial for excellence.

Overall, we want to improve life and work at sea, and we believe that our social impact methodology can help steer the industry towards a sustainable model that values seafarers as partners in shared progress and real improvements at sea.

Reality Checked

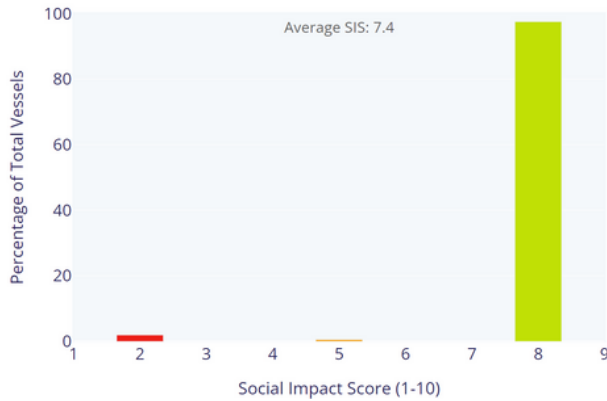
Here you can see the average scoring across all the **Idwal 10: Social Impact Pillars**. Band 1 is the most positive and Band 5 the most negative with the worst crew welfare conditions showing in deep red and the best in deep green.



The Idwal Social Impact Report

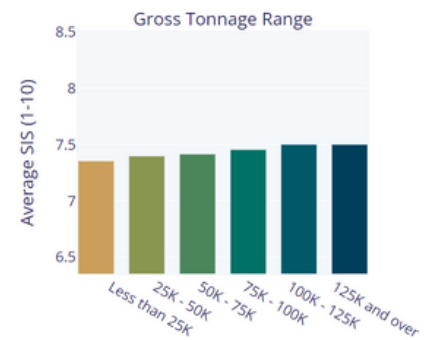
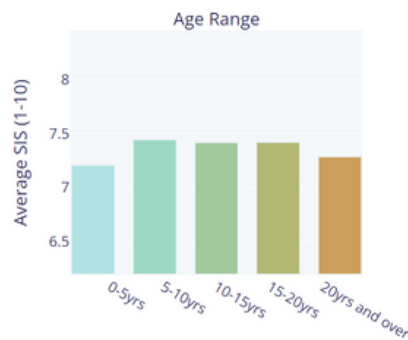
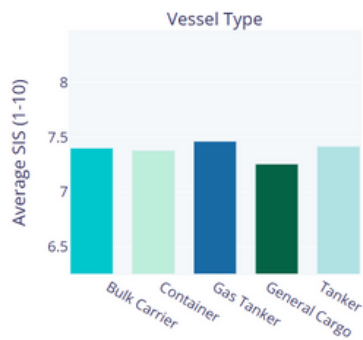


Administration



This pillar focuses on crew contracts, documentary checks, Port State Control (PSC) inspection history, and compliance with the Maritime Labour Convention (MLC). These elements highlight the importance of legal compliance, safety, and crew welfare in the administration of the vessel.

With scores averaging 7.4 out of 10, representing a 26% gap, there is substantial room for improvement. Crew paperwork, contract controls, inspection histories, and MLC adherence are seen as key areas of safeguarding against mistreatment, hazards, and legal liabilities. Checking these provides a vital diagnostic to expose weaknesses.

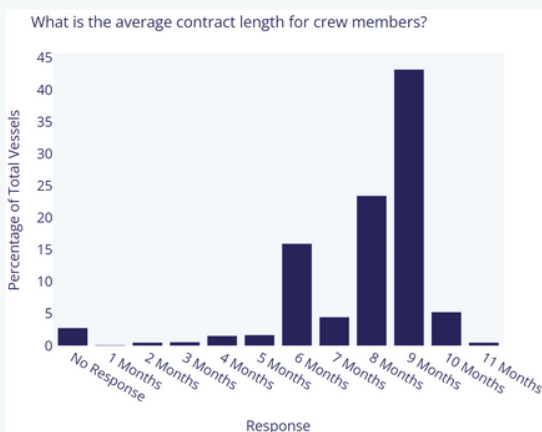


The lower scores among general cargo vessels signal challenges in overseeing administrative aspects within that sector. And the drop-off at both ends of vessels' lifespans indicates that crew compliance receives less priority as attention shifts to technical considerations during newbuild and scrap phases. Proper procedural diligence appears difficult to uphold consistently across the board.



One question spotlight

What is the average contract length for crew members?



In this reporting period we found the majority of crew were serving a 9-month contract. The longest reported was 11 months.

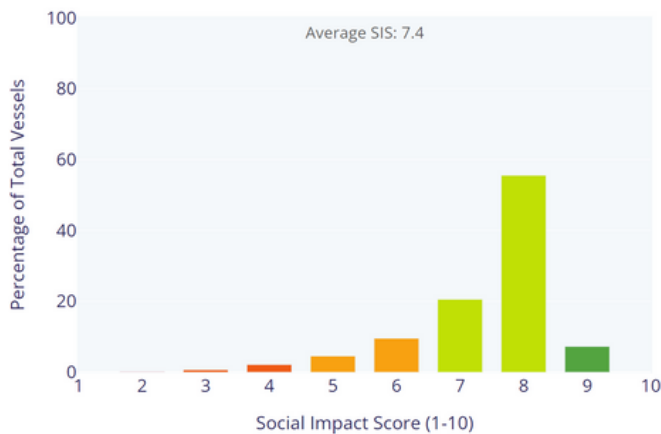
MLC 2006 requirements state the maximum continuous period that a seafarer should serve on board a vessel without leave, is 11 months. As such, our assessment bears this out, which is reassuring.

Contract lengths can vary greatly depending on factors like the type of ship, the shipping company, and the position on board.

Excessive contract lengths without adequate leave have been shown to negatively impact seafarer mental health, safety, training and retention. Reasonable contract lengths with regular shore leave are important for the sustainability and humane treatment of the profession.

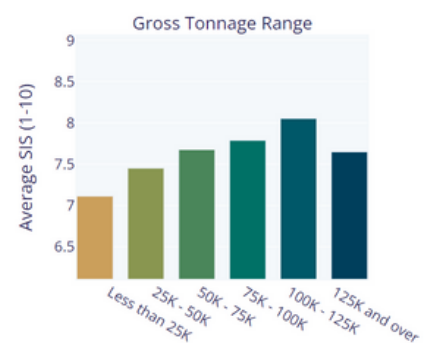
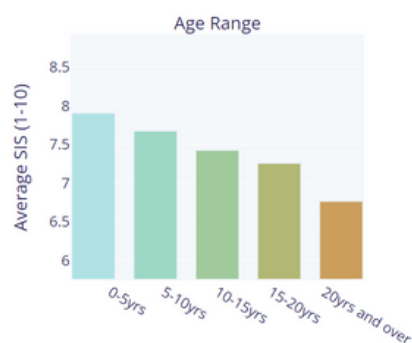
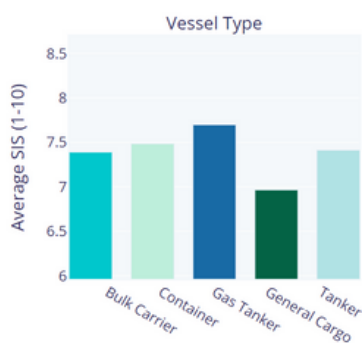


Comfort



'Comfort' relates to the quality of living conditions for the crew, including facilities provided in crew cabins, standard of accommodation, cleanliness, and the condition of upholstery and furniture.

This emphasises the company's commitment to providing a comfortable and pleasant living environment for crew members, which contributes to their wellbeing, morale, and job satisfaction. In this reporting period we found, on most vessels, the accommodation spaces are being utilised as intended for their assigned purposes.



The average score of 7.4 out of 10 suggests there are widespread deficiencies in living conditions across vessels inspected. A 26% shortfall is quite significant.

General cargo vessels in particular are falling short in providing comfortable living spaces for crew. As one of the most common vessel types, this impacts many seafarers.

Older vessels are synonymous with poorer living conditions; as ships age, interiors degrade without proper maintenance.

Larger ships up to 125k gt tend to provide better accommodations.

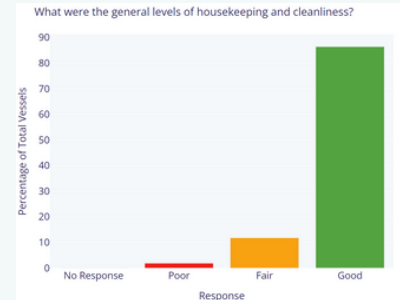
Implications of a social impact gap in this category can mean:

- Sub-standard living conditions, which could negatively impact seafarer health, morale, retention and safety.
- That more attention and investment is needed by owners/operators to maintain living spaces.
- Targeted audits of high-risk vessel types like general cargo and older ships are needed to help enforce standards.
- Regulations like MLC may need strengthening to ensure minimum standards are met across all vessel types and ages.



Deeper Dive Comfort

Our assessment of the accommodation outfitting indicates the quality is average across the vessels inspected and we found that general housekeeping and cleanliness of the accommodations was observed to be good, which is a positive sign.

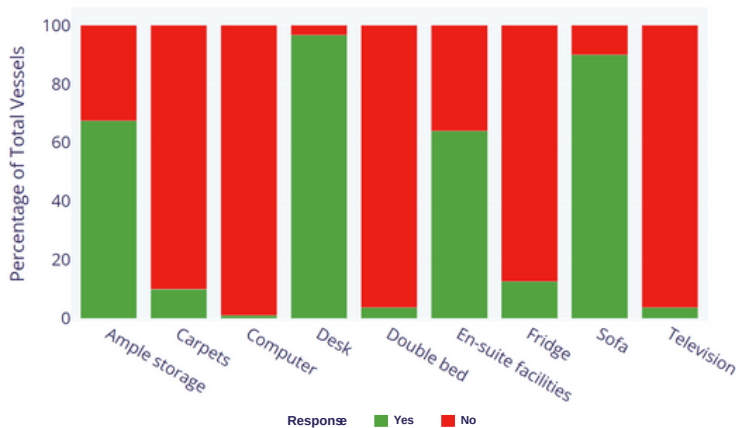


Implications of this result include:

- Basic housekeeping standards are being adequately maintained by ship operators and crews. This contributes to habitable living conditions.
- Good cleanliness suggests protocols and practices are in place for regular cleaning and sanitation of living spaces. This is important for health and hygiene.
- Crew are being provided with essential housekeeping tools and supplies needed to keep their cabins and common areas tidy.
- Ship management is allocating resources and attention to cleanliness alongside more technical ship operations.
- Decent housekeeping indicates respect for crew welfare and wellbeing in providing a hygienic place to live.
- Maintaining clean spaces helps avoid deterioration of accommodation interiors over time.

While the overall quality and comfort of furnishings is found lacking across many vessels, the fact that general cleanliness is upkept is encouraging. This discipline around housekeeping should be maintained along with upgrades to aging or inadequate furniture and fittings. Quality accommodation encompasses both habitability and hygiene.

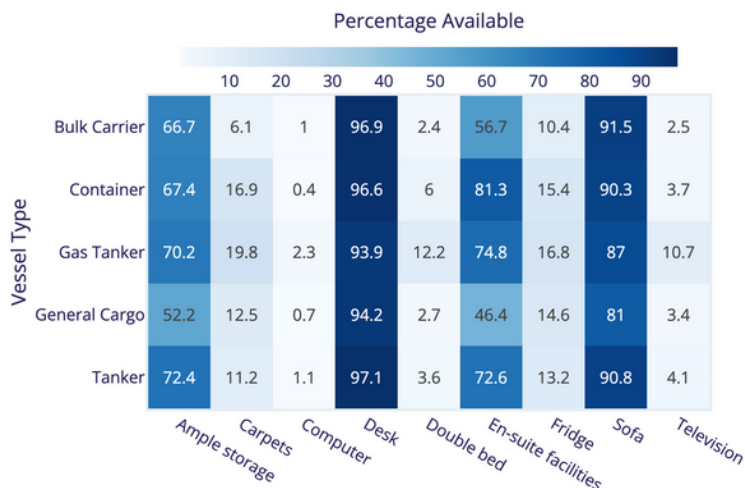
Availability of Crew Cabin Facilities



We explored the key aspects of comfort and accommodation and how they can improve or detract from quality of life at sea. We found:

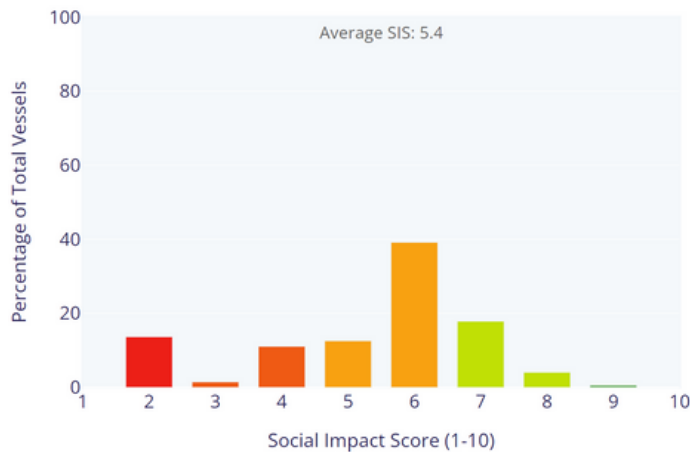
- Lack of sufficient personal storage space was reported as an issue. Having adequate and convenient storage is important for living in tight quarters.
- Most crew cabins lack carpeting, which can be detrimental as carpets can make spaces feel more warm, comfortable and homely.
- Access to personal computers and IT resources was extremely limited, with the vast majority reporting no computer access.
- Basic furnishings like desks and sofas were missing from some crew cabins. These allow comfortable places to work and rest.
- The majority of cabins had small single bunks. This is the norm, and it could be that there is a loss in comfort, though there can be advantages in rough weather.
- In-cabin fridges were a rarity, reducing ability to store personal food/drink items, and the majority of cabins lacked TVs, which can be seen as negatives.

Percentage of Vessels With Cabin Facilities by Vessel Type



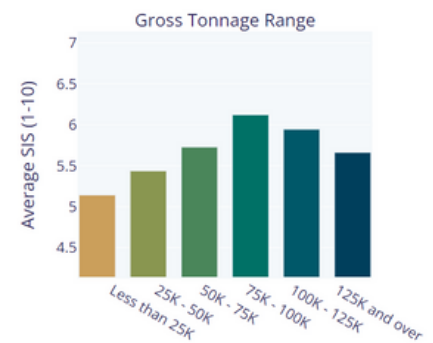
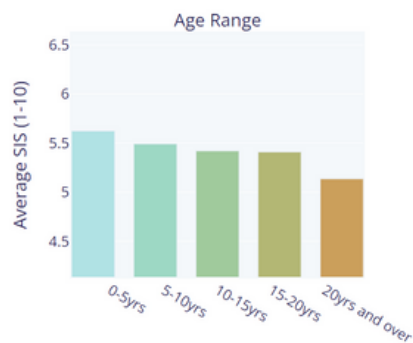
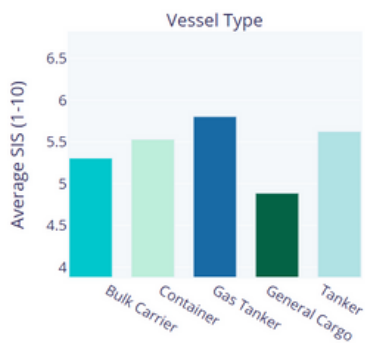
The assessment paints a picture of relatively spartan living conditions for many seafarers with cabins lacking in basic comforts and amenities that could improve quality of life during long contracts away from home.

Connectivity



This pillar addresses the provision of wifi and internet speed on board, highlighting the demand for good, cost-effective wifi access for seafarers. This reflects the importance of connectivity for crew members to stay in touch with their loved ones and access essential information while at sea.

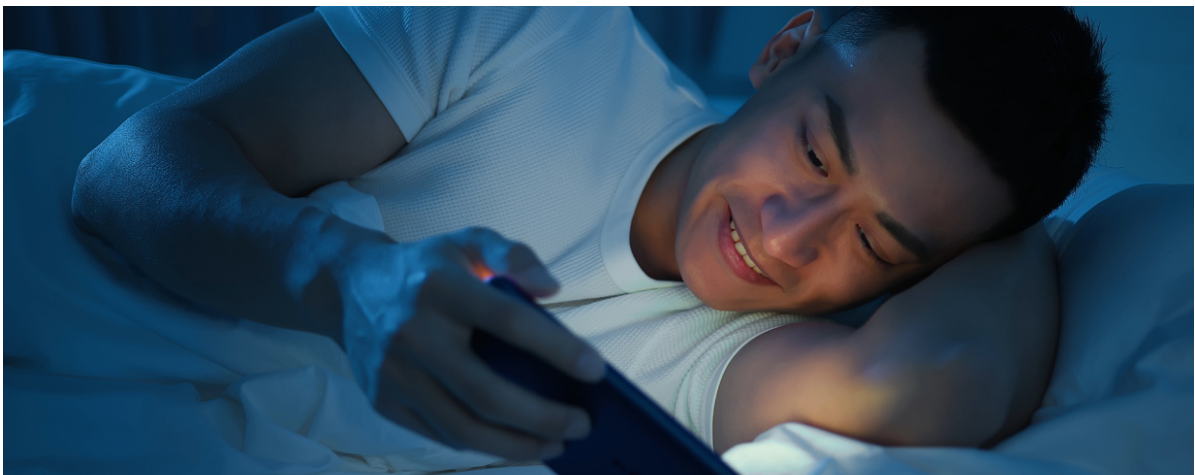
The very low average score of 5.4 out of 10 for connectivity indicates major deficiencies exist across vessels. Providing seafarers with sufficient shipboard connectivity comparable to land-based standards should be a top priority to address this worst performing pillar.



Access to email, messaging, calling and internet is vitally important for seafarer morale, wellbeing and links to family. Poor connectivity contributes to isolation from family and life at home.

General cargo vessels lag significantly in providing crew connectivity. As a common vessel type, impact is substantial. Connectivity quality declines on older vessels as equipment becomes outdated, so regular upgrades are needed. Larger ships up to 125k gt tend to have better connectivity resources but standards are still lacking across the board.

Significant investment is required by ship owners/operators to improve internet bandwidth, wifi infrastructure, and access solutions for crew. Enhanced connectivity must balance cost, bandwidth, shipboard technical constraints, and cybersecurity considerations. Despite changes to MLC2006, minimum connectivity standards are still an issue.

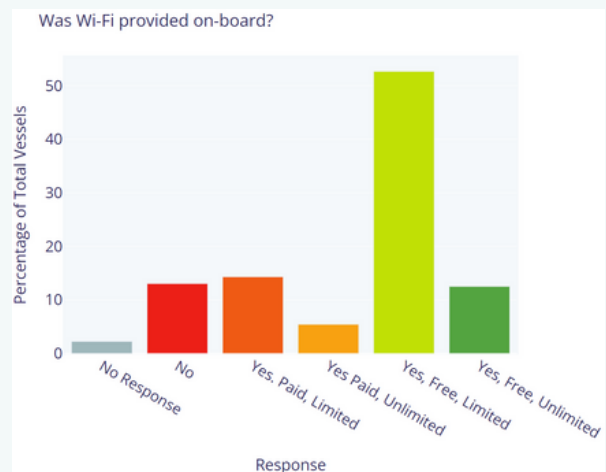




Deeper Dive Connectivity

As the worst performing social impact pillar across the research, this highlights connectivity as an area demanding substantial improvement industry-wide.

It was good to see that over half of vessels provide free wifi for crew, although we need to caveat this statement with the reality of the limits in place and highlight that these limits further restrict meaningful connectivity for seafarers: bandwidth and download allowances must be sufficient.



The 12.5% of vessels offering unlimited free internet is encouraging, showing it is possible to provide this essential amenity. However, any positive views must be tempered with the fact that an alarming 13% of ships, in this reporting period, had no internet access at all, which is extremely disappointing.

The fact that such a significant percentage of vessels are without internet access seems anachronistic in an industry now more connected and data driven than ever. Such a lack of basic connectivity exacerbates isolation and creates crew welfare issues.

More resources could be invested in IT infrastructure and airtime costs to enable free, unlimited internet as a basic crew welfare standard. Indeed, affordable unlimited wifi is more available today than it ever was before thanks to LEO services like Starlink, which will hopefully start to make a significant impact on this category.

The fact that such a significant percentage of vessels are without internet access seems anachronistic in an industry now more connected and data driven than ever.

What is the approximate average internet speed?



Having only average, limited internet speeds on board ships can negatively impact seafarers in several ways:

- Inhibits basic communication via email, messaging and calling apps. This exacerbates feelings of isolation from family.
- Restricts access to entertainment, like streaming video services, online games and social media.
- Prevents many online training/education resources to advance skills and careers
- Compounds existing stresses of long contracts away from home and is extremely frustrating to deal with when trying to access.

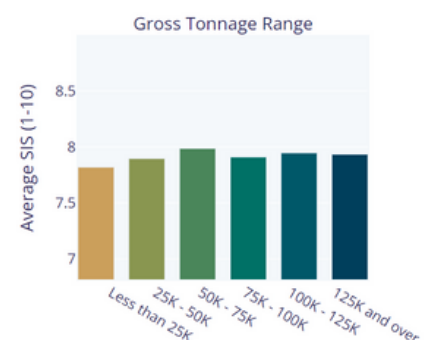
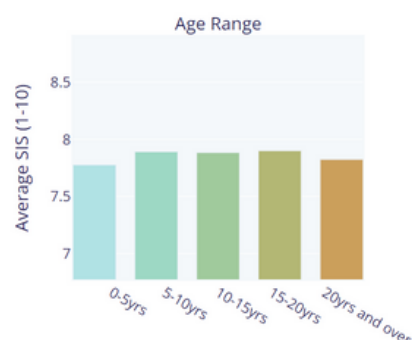
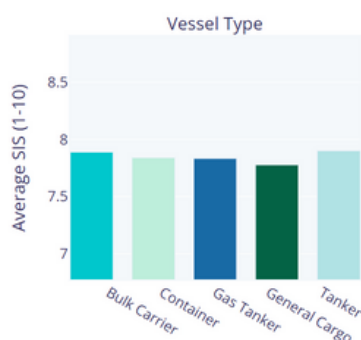


Culture and Diversity



Here, we focus on inclusivity, recognising and celebrating religious and cultural events, as well as showcasing the diversity on board in terms of nationalities and gender representation. These elements highlight the vessel's commitment to fostering an inclusive and supportive environment that values diversity and promotes a sense of belonging among the crew.

Inclusivity and cultural/religious awareness are important for crew morale and wellbeing when away from home. The research findings in this category showed an average score of 7.9 out of 10, which indicates general progress in this area, but there is still room for improvement.

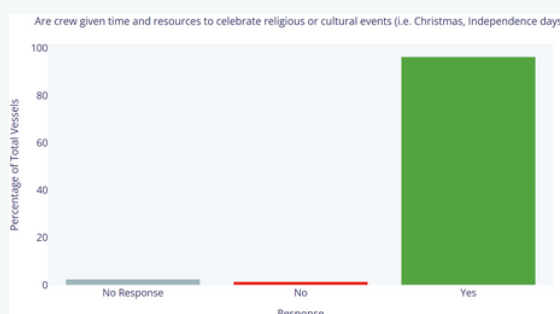


General cargo ships lag behind other vessel types regarding diversity efforts. As a common vessel type, impact is substantial. Age of vessel does not seem to be a major factor influencing diversity, unlike some other welfare aspects. Vessel size also shows little correlation, though the 50-75k gt range scored highest. Multi-national crewing is the norm, so cultural sensitivity and awareness is ever more critical. Avoiding bias and discrimination should be emphasised in company policies and training.



One question spotlight

Are crew given time and resources to celebrate religious or cultural events (e.g. Christmas, independence days, etc.)?



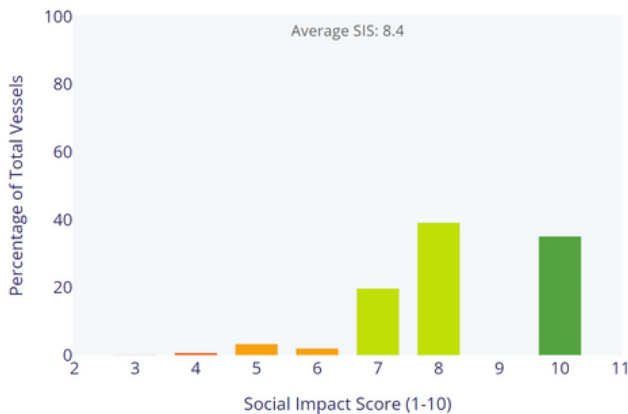
The finding that 96% of crew were granted access to celebrate cultural and religious events is an encouraging sign of progress regarding diversity and inclusion onboard ships. This suggests:

- Most ship operators are recognising the importance of allowing crew to observe events significant to their cultural heritage or faith while working contracts away from home.
- Efforts are being made to accommodate practices like fasting, prayer times, cuisine preferences, and time off around major holidays.
- Permitting cultural/religious celebrations boosts morale, inclusion and sense of community. This benefits crew welfare and wellbeing.

Continual improvement of diversity and inclusion practices will help the maritime industry recruit and retain the best crews from all over the world. However, the ability for so many seafarers to celebrate their culture is great to see and is one that the industry should be proud of.

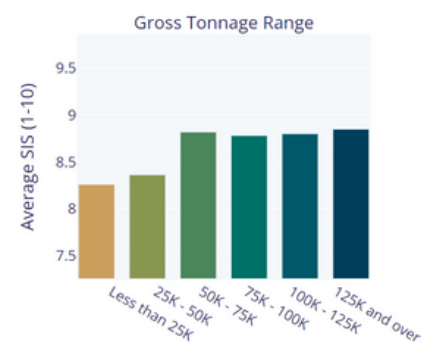
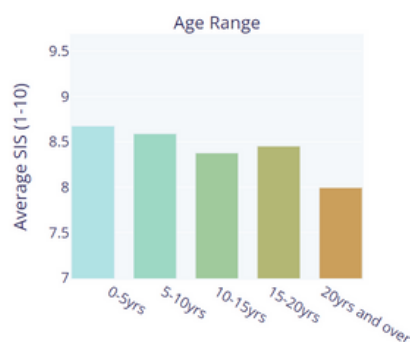
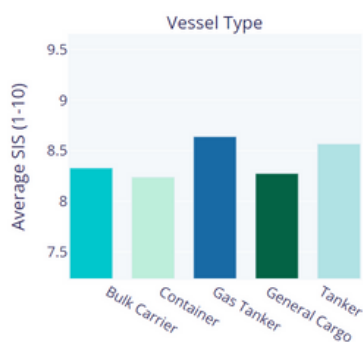


Facilities



This pillar covers aspects such as the general condition of external superstructure fittings, and access to a bonded store. These elements highlight the vessel's commitment to maintaining a professional appearance, providing essential supplies for the crew, and ensuring a clean and hygienic environment.

Our findings on shipboard facilities show an average score of 8.4 out of 10. This suggests general maintenance and provision of facilities is decent but could still improve.

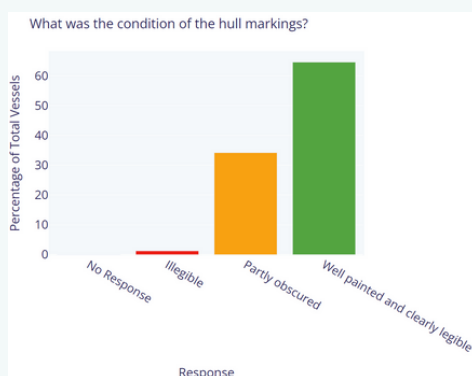


- A clean, tidy, professional appearance is important for crew morale and conveys company values.
- Access to personal supplies through bonded stores is a crew welfare necessity while at sea long term.
- Hygiene standards must be upheld through cleaning of facilities and living spaces. This impacts health.
- Container ships seem to lag on facility maintenance compared to other vessel types. They should be a focus.
- Declining quality correlated with older vessel age and highlights need for continued investment in maintenance. Larger ships tend to have better facilities, but standards fall short across segments.
- While essential facilities like stores and cleaning are adequately provided, targeted audits of high risk vessels along with facility enhancement initiatives across aging and smaller ships could improve conditions.



One question spotlight

What was the condition of the hull markings?



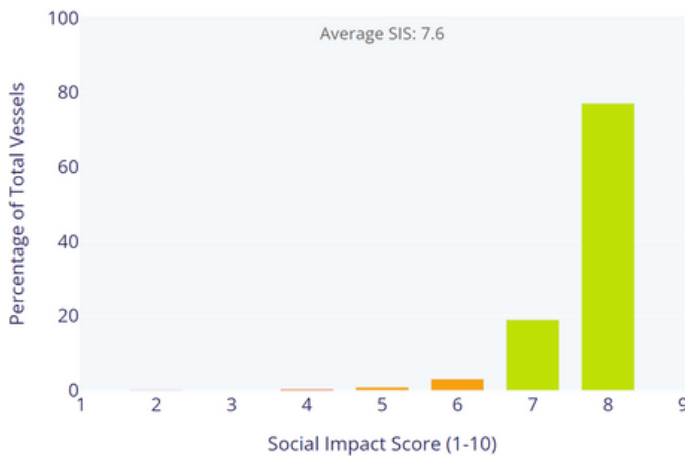
The finding that most ships inspected had well-maintained external superstructures and hull markings suggests some positive implications:

- Properly painting and caring for exterior fittings signals company pride in the vessel appearance, which reflects positively on management.
- A clean, tidy exterior work environment boosts crew morale versus a rusty, degraded appearance.
- Good maintenance implies proper provision of painting/cleaning supplies and budget allocation.
- Lack of flaking paint reduces risk of crew exposure to lead or other hazardous materials.
- Clear, properly maintained hull markings, signage and lighting are important for safe navigation per maritime regulations.
- A rust-free, professional external appearance conveys a commitment to proper care of the entire vessel including crew welfare amenities.

While only an outward indicator, properly maintained exteriors suggest oversight of factors that enable good crew welfare like safety, hygiene and management support. Sustaining this discipline should remain a priority.

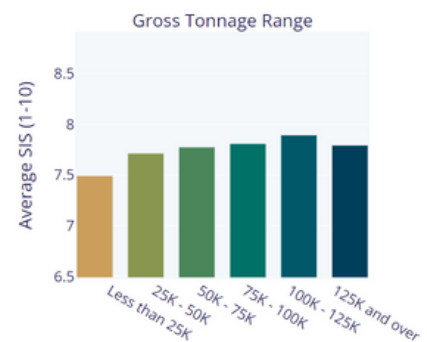
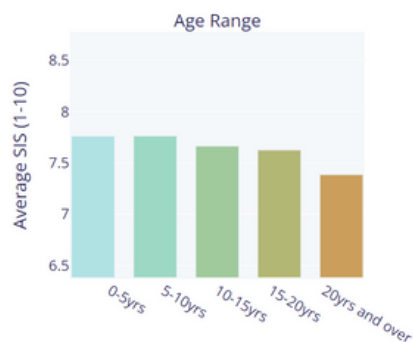
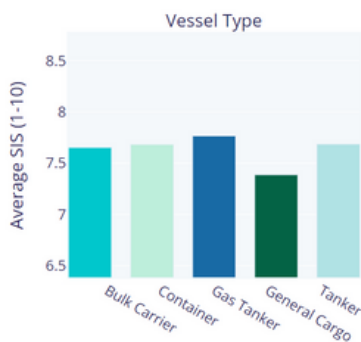


Health and Wellbeing



This pillar addresses various aspects such as access to drinking water, garbage management, quality and availability of food, access to recreation facilities, and cleanliness in the galley. These aspects emphasise the importance of crew health, safety, and wellbeing.

Our on-board findings point to some serious implications. The average score of 7.6 indicates shortcomings across vessels regarding crew health and welfare. A 24% deficit shows attention is required across the board.



Access to clean water, nutritious food, gym facilities, recreation, etc. are fundamental for physical and mental health during contracts. Failures here have a huge knock-on effect and impact.

- General cargo vessels lag other ship types for health factors. As a common vessel type, impact is far-reaching.
- Health and wellbeing declines with vessel age, likely due to degraded equipment. Investment in upgrades is needed targeting older ships.
- Larger vessels tend to have better health-related amenities but still fall short of expectations; minimum standards could help.

It appears the fact that ship owners/operators need to prioritise evidence-based health initiatives from nutrition to exercise to rest. This impacts long-term crew retention and performance.

The evidence makes a compelling case for targeting health and wellbeing as a priority area for improvement industry-wide. Healthy, happy crews translate into safe, efficient and sustainable maritime operations.



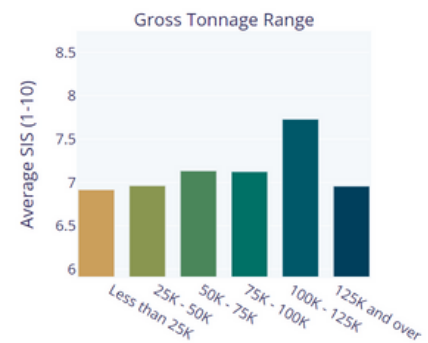
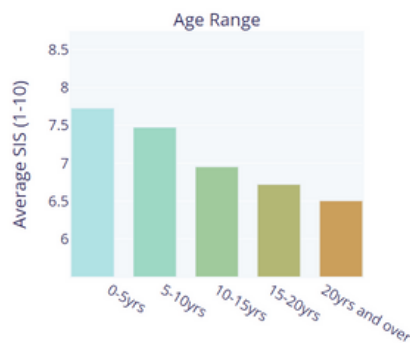
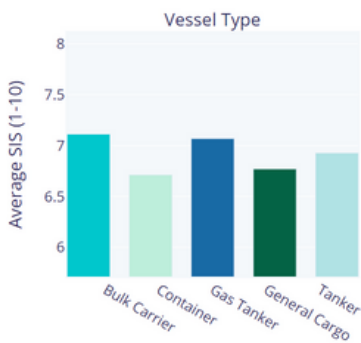


Management Issues



'Management Issues' encompass the vessel's Flag State and Class standing, highlighting potential concerns if there are frequent changes and raises questions about the reasons driving switches, leading to potential allegations of regime "shopping" to suit the owner's needs – and this is seldom done to improve standards.

Our findings related to Flag State, Class, and management oversight deliver an average score of 7.0 out of 10, which indicates systemic deficiencies across vessels inspected.



According to our research:

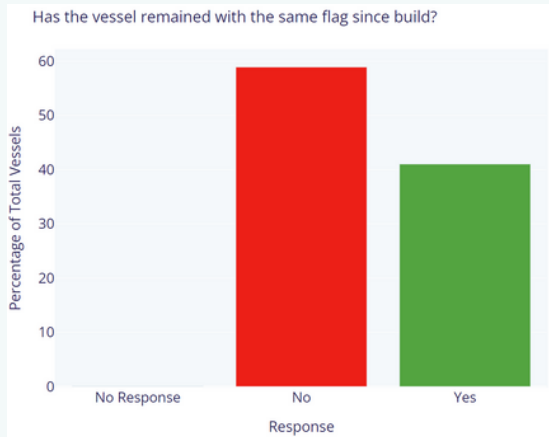
- Bulk carriers perform best on management metrics, while containerships and general cargo vessels lag; focused audits could help.
- Oversight declines with vessel age, likely due to outdated or minimal management systems on older ships.
- Larger vessels exhibit better management, but still fall short. Minimum management standards could drive improvement.
- Regulators should scrutinise frequent Flag/Class changes and require justification to deter jurisdiction shopping.
- Companies should invest in management systems that uphold standards, empower crews, and provide welfare protections.
- Progress requires industry-wide commitment to regulatory compliance, transparency, and crew advocate groups to report sub-par conditions.
- The research reveals oversight shortcomings, suggesting heightened diligence by Flag States and ship operators is required, to enact and enforce management practices that safeguard crew welfare.

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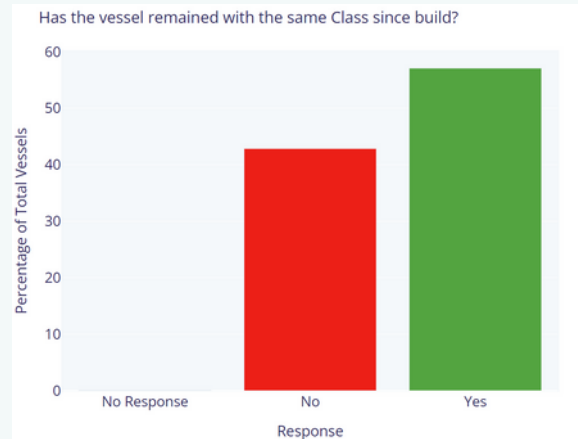


One question spotlight

Has the vessel remained with the same Flag since build?



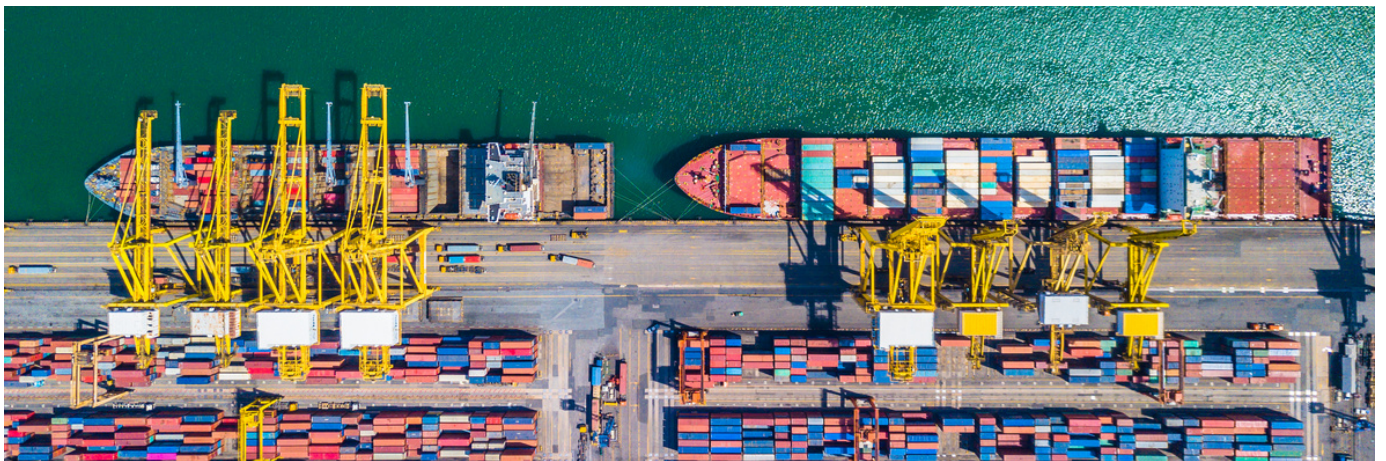
Has the vessel remained with the same Class since build?



The finding that 59% of vessels had changed Flag States since being built, while 57% maintained their original Class suggests a couple implications:

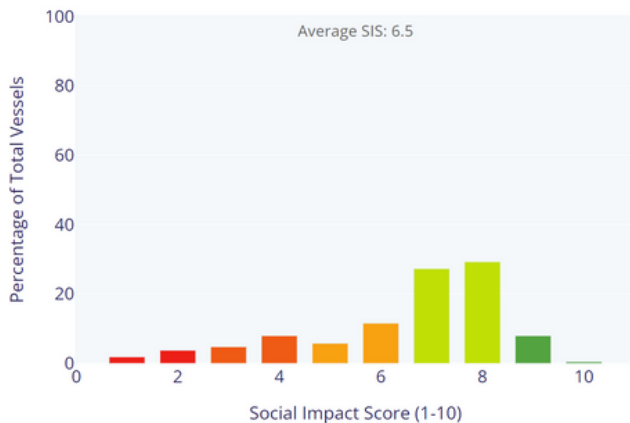
- Some Flag Registries may be more inclined to relax standards or offer financial incentives to attract vessel registrations.
- Flag State oversight has more direct impact on crew welfare and working conditions via labour regulations, and finding more amenable registries can be a reason to move.
- Port State Control helps deter lowering of standards through Flag switching, but risk remains.
- Classification societies have long-term technical and commercial relationships with ship owners/managers that deter switching.
- Switching Class would require extensive surveys and certification work. Staying with the original Class is often the path of least resistance, while this paperwork will also be the requirement for moving Flag.
- Class rules focus more on technical standards. As long as Class approves design changes, owners can maintain service continuity by retaining Class.

Overall, it appears commercial factors and service continuity incentivise owners to remain with the original Class society, while pursuit of favourable safety regimes and labour regulations enables Flag State shopping despite the risks it poses to maintaining robust regulatory oversight.



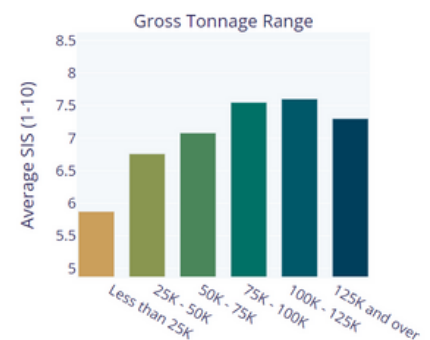
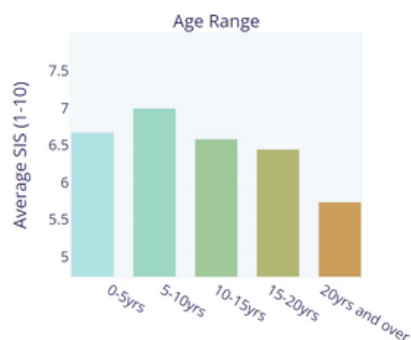
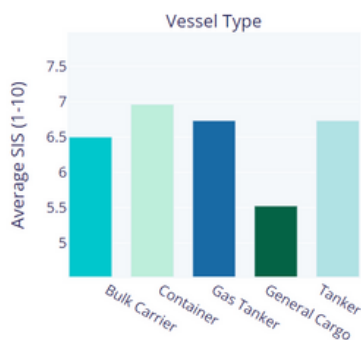


Recreation



This pillar relates to the employee “downtime” aspect of the social pillar. Companies that prioritise recreation provide opportunities and resources for employees to engage in recreational activities, promoting work-life balance and supporting their overall wellbeing.

Our findings here saw a low average score of 6.5 out of 10 and a 35% social impact gap. This indicates severe deficiencies exist across vessels inspected, making recreation a high priority for improvement of seafarer welfare.



Access to recreation, social spaces, and leisure activities strongly impacts crew morale, stress, mental health and overall welfare.

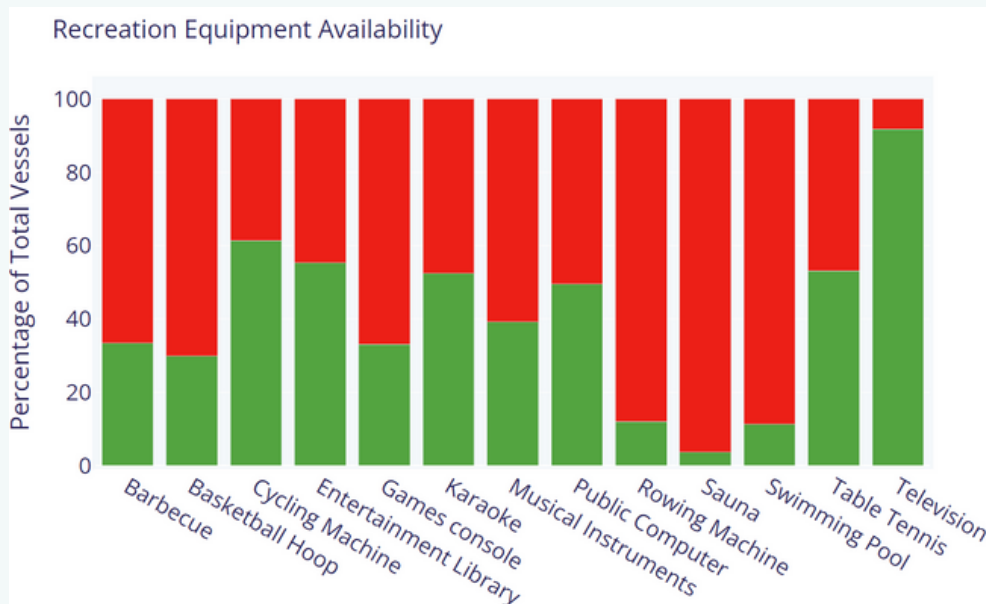
- General cargo vessels lag significantly in recreation access compared to other ship types. Focused audits could help.
- Recreation spaces and equipment degrade with vessel age without proper maintenance and renewal.
- While larger ships tend to have better recreation amenities, all segments fall short of expectations, so minimum standards could drive progress.
- Providing recreation opportunities is vital for attracting and retaining seafarers in today's competitive labour market.
- Companies must invest substantially in upgrading and maintaining recreation spaces and equipment.

These results strengthen the case for expanding recreation access, ensuring that it is a top priority for improving seafarer welfare and ensuring a sustainable seafaring workforce.





Deeper Dive Recreation

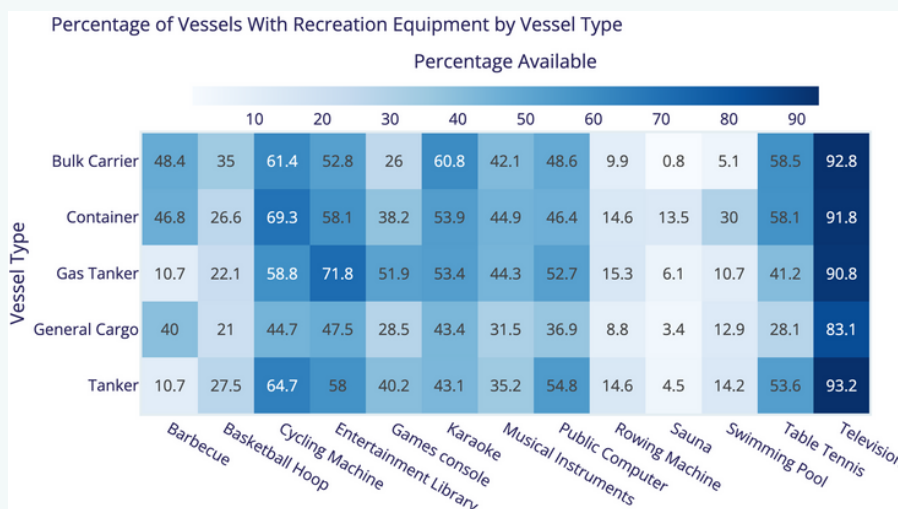


Recreation equipment and amenities found on ships can vary greatly depending on the vessel type, size, and operating company. Some common recreation facilities provided for crew include:

- **Exercise equipment** - Treadmills, stationary bikes, ellipticals, rowing machines and small gyms help crews stay active and healthy.
- **Sports gear** - Basketball hoops, table tennis, and deck areas for games like badminton allow physical recreation.
- **Swimming Pools** - Some ships have swimming pools for crew use, though usage varies dependant on trading areas and the social mix onboard. Seeing empty and dilapidated pool areas is often symptomatic of issues onboard.

- **Entertainment** - TVs, surround sound systems, gaming consoles, DVD libraries and musical equipment offer different leisure options.
- **Outdoor facilities** - Barbecues, seating and open deck space provide fresh air and social events
- **Community areas** - Lounges, cafes, and community rooms allow crews to relax and socialise together.
- **Computers** - Access to desktop computers, laptops, and internet connectivity facilitates communication with home and entertainment.

Quality and variety of recreation amenities can significantly impact crew morale and welfare. Companies invest based on vessel type, route and budget but all crews deserve basic access to both fitness and leisure facilities.

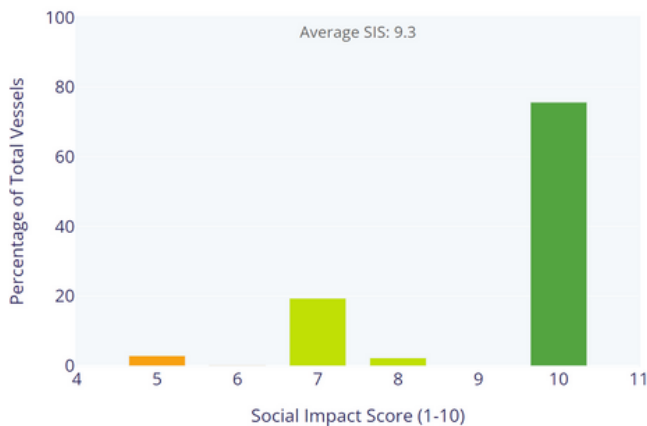


A closer look at the percentage of ships that have specific types of recreation equipment and also broken down by vessel type.

The lighter the colour, the lower the occurrence of that piece of recreation equipment on that type of vessel!

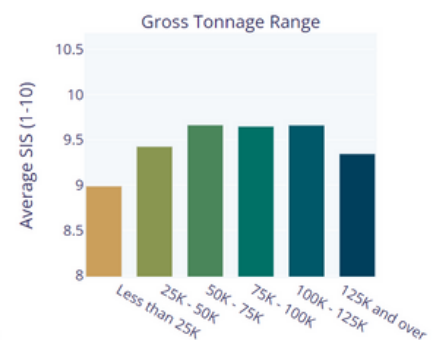
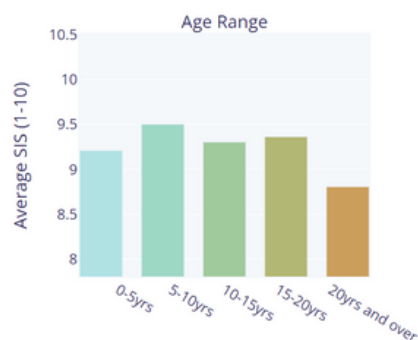
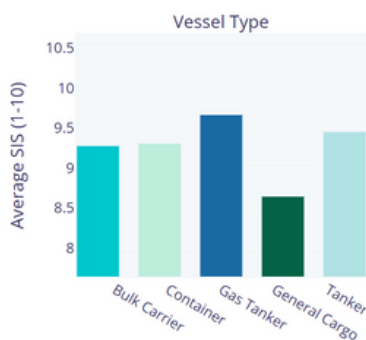


Seafarer Development



'Seafarer Development' focuses on training facilities, complaint policies, and officer support. Industry focus on improving seafarer development standards and addressing shortcomings is vital for seafarer wellbeing, safety, and overall vessel performance.

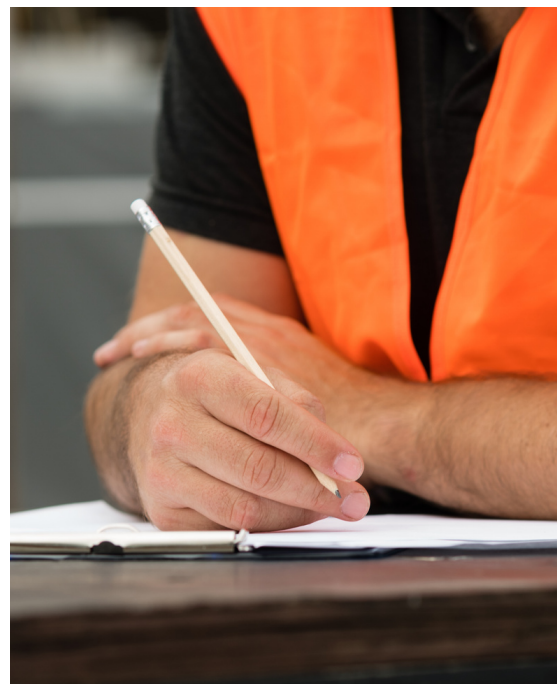
Our findings reveal positives in seafarer development but also show variations based on vessel type, age, and size. The high average score of 9.3 in seafarer development signifies a strong emphasis on training facilities, complaint policies, and support for seafarers.



While the existing facilities and policies largely meet or exceed industry requirements, even minor shortfalls can have a notable impact, especially on safety and quality of life aboard ships.

- Gas tankers excel in providing favourable conditions for seafarer development, possibly due to the complexity of their cargo, specific regulations, or operational practices.
- Seafarer development appears consistent across vessel age until ships pass 20 years, indicating that newer vessels tend to offer better training and support.
- Conversely, the plateau in development at 50k gt and decline for vessels over 125k gt suggests some issues on larger vessels.

Investigating the reasons behind these variations can guide necessary improvements in welfare and ensure a sustainable seafaring workforce.





Deeper Dive

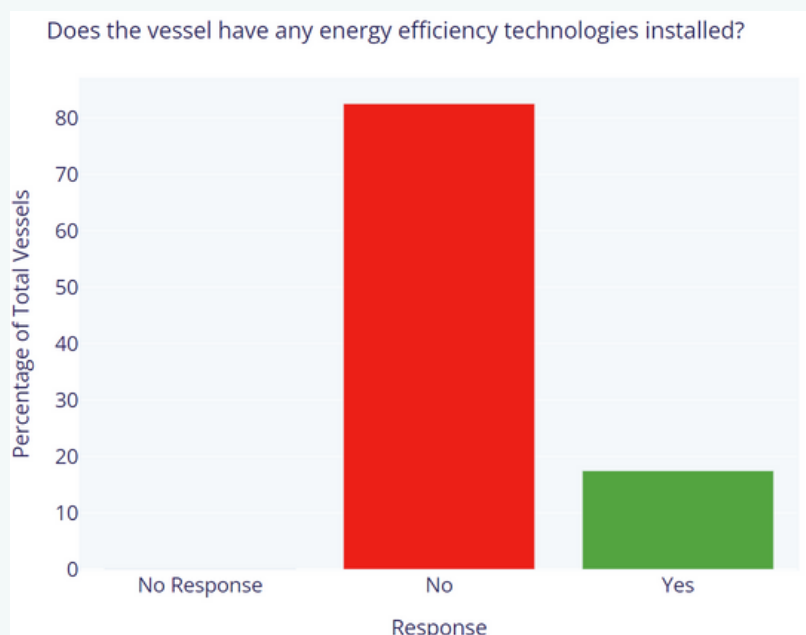
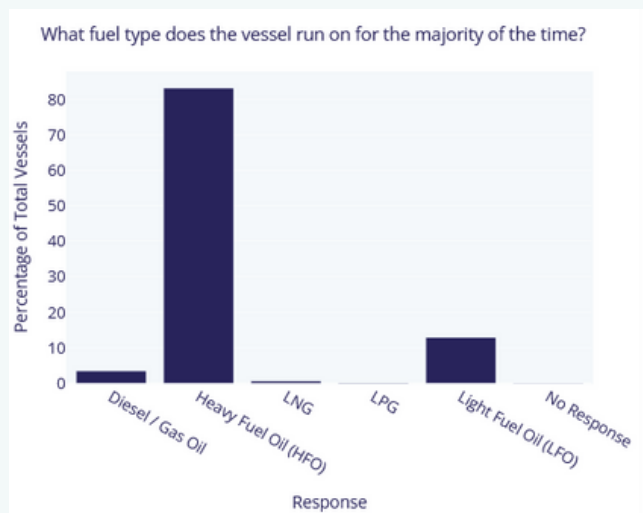
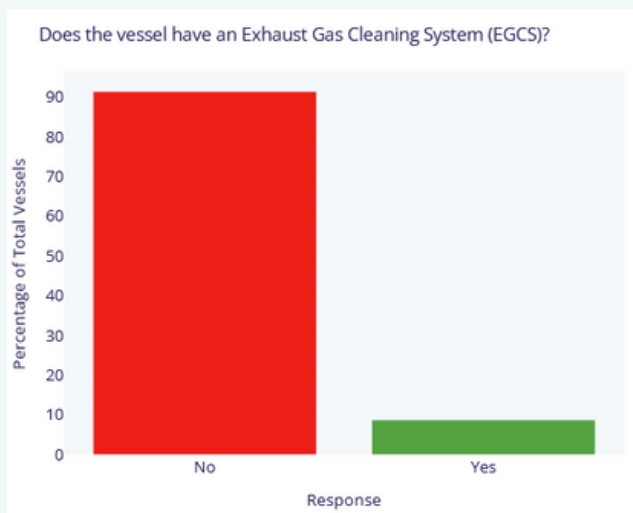
Seafarer Development

Assessing decarbonisation equipment and fuels provides insights on development needs. This is also seen as being part of a just transition when it comes to seafarers working with future fuels and developments in vessel design.

Our inspections found 90% of ships lacked exhaust gas cleaning systems and the majority are still using heavy fuel oil, while just 17.5% had energy efficiency technologies. These facts show that there is currently a limited transition to future fuels.

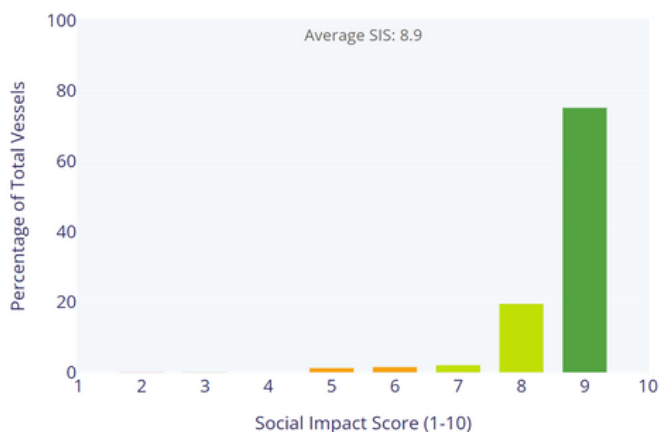
While decarbonisation equipment is still yet to be ubiquitous, core developmental provisions like training access and communication channels remain strongly supported. Targeted upskilling for emerging tech will further crew readiness amid evolving environmental regulations.

This means that seafarers are not yet getting to experience the fuels, systems and equipment which will become part of the sustainable shipping future. Which is a concern, and could further undermine development and operational realities.



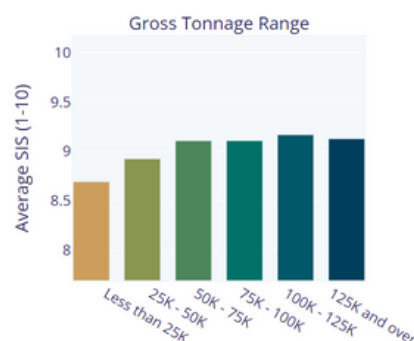
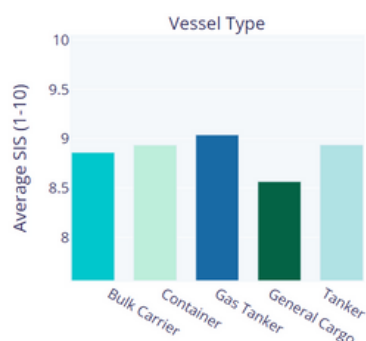


Workload



This pillar addresses crew hours of work and rest, machinery space operations, accuracy of hours of rest records, and aspects of digitalisation and management tools. These elements shed light on crew workload, fatigue management, compliance with regulations, and the vessel's adoption of technology to optimise operations and improve crew welfare

The average overall score of 8.9 indicates that, on average, seafarers experience relatively good conditions regarding their workload, fatigue management, compliance with regulations, etc.



According to our research:

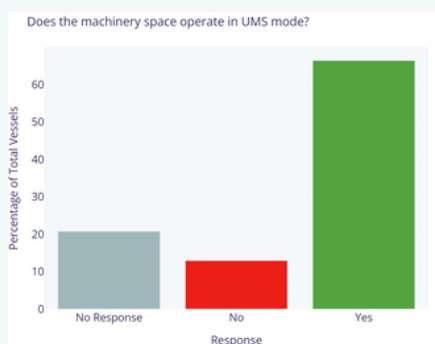
- General cargo vessels are a concern, as they exhibit the poorest workload management, potentially leading to fatigue and job dissatisfaction.
- Workload remains consistent across vessel ages until ships pass 20 years, suggesting outdated machinery may contribute to increased seafarer workload and fatigue.
- Larger vessels show better workload management, suggesting enhanced working conditions.

Despite industry wide concerns and compelling feedback elsewhere about excessive hours, there are positive indicators in managing seafarer workload, fatigue, regulations, and technology adoption. However, disparities do exist among vessel types, with older vessels requiring improvement, and smaller vessels generally needing to provide better workload management.



One question spotlight

Does the machinery space operate in UMS mode?



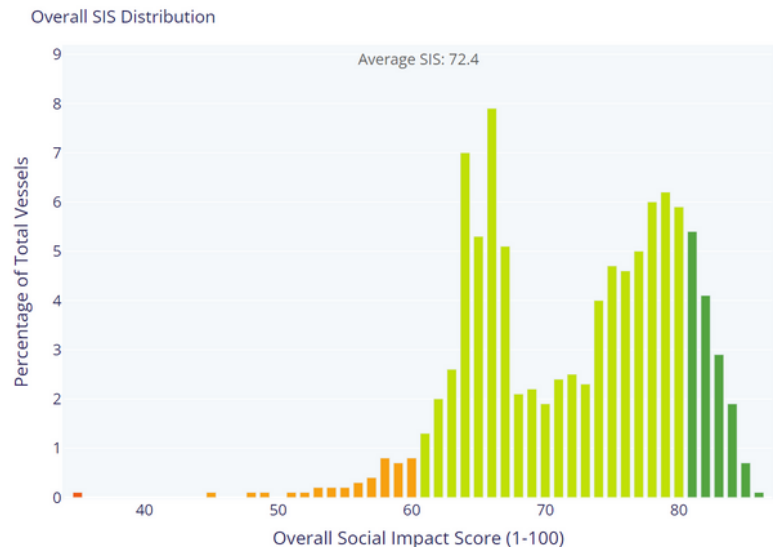
The **66%** of vessels in Unattended Machinery Space (UMS) mode this reporting period is pivotal for workload management:

- UMS automates machinery and reduces the need for constant human presence, easing the seafarer workload by minimising personnel required for supervision.
- Automation in UMS often incorporates advanced safety systems, enhancing vessel safety, and allowing seafarers to focus on safety-critical tasks.
- UMS integrates advanced tech and real-time monitoring, aiding workload management and enabling predictive maintenance to prevent breakdowns.

Such technology streamlines machinery operations, improves safety, ensures regulatory compliance, and enhances operational efficiency, benefiting seafarers.

The Broad View

The overall average across the range of vessels we inspected in the time period was an **Idwal Social Impact Score of 72.4**. This represents the cumulative assessment of social impact within the maritime industry, taken from Idwal ship inspections. A gap from perfection of 27.6 means that there is still much room for improvement in addressing these social impact factors.



The implications of this gap across the average of these areas are as follows:

Administration: A gap in administration implies that there may be room to enhance labour practices, such as personnel management, contractual agreements, and compliance with employment regulations and standards. Improving administrative efficiency can positively impact seafarers.

Comfort: The gap in comfort indicates that there is potential to enhance seafarers' physical and psychological comfort onboard. This, in turn, can contribute to better overall employee wellbeing and job satisfaction.

Connectivity: A gap in connectivity suggests that seafarers may have limited access to communication and social connections while at sea. Closing this gap can significantly improve the mental and emotional wellbeing of seafarers.

Culture and Diversity: Addressing the gap in culture and diversity indicates a need for fostering a more inclusive and diverse workplace environment. Promoting diversity and inclusion can lead to a more equitable and harmonious workplace.

Facilities: A gap here implies that there is room for improvement in the living and working conditions for seafarers. Enhancing facilities can have a direct positive impact on employee wellbeing.

Health and Wellbeing: Closing the gap is essential for enhancing seafarer's overall health and job satisfaction. Access to healthcare services and wellness programs is vital for their wellbeing.

Management Issues: This suggests a need for improvement in management practices across various areas, including human rights, labour practices, employee wellbeing, and safety and quality standards. Enhancing management practices can positively impact multiple facets of the maritime industry.

Recreation: Addressing the gap can significantly contribute to seafarers' overall wellbeing by providing them with opportunities for relaxation and stress relief during their time at sea.

Seafarer Development: Improving seafarer development can directly contribute to employee wellbeing by offering training, career advancement opportunities, and skill development.

Workload: Addressing the workload gap is essential, ensuring that seafarers' working hours are manageable and comply with regulations..



The Good

Highest score recorded: **87.7**
Supramax Bulk Carrier
Flag: Finland
Class: DNV



The Bad

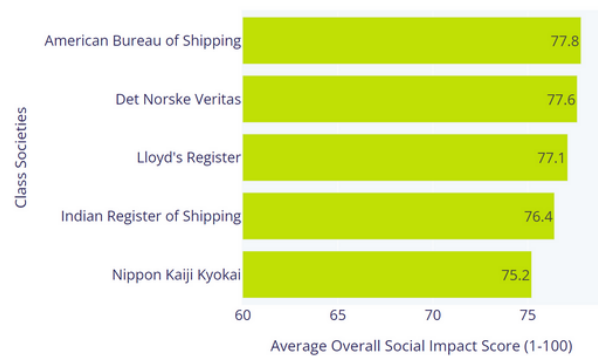
Lowest score recorded: **34.7**
General cargo vessel
Flag: Mongolia
Class: PMDS

Best Performers

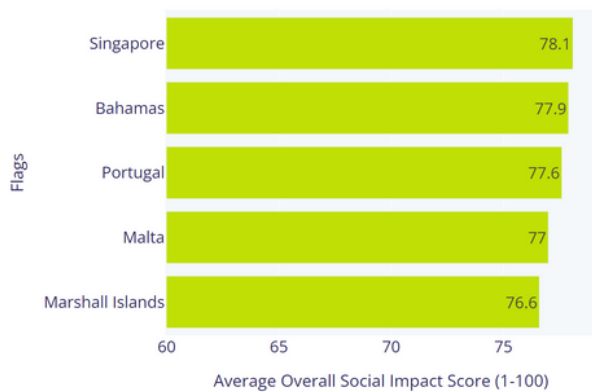
Thanks to our robust and standardised methodology in collecting inspection data, we can review the social impact score against multiple criteria. Here, we look at the top performing Flag States, Class societies, P&I clubs, ship management company countries and countries of build with respect to the Idwal Social Impact Score.

These stakeholders have clearly and demonstrably prioritised high social performance. Vessels associated with these entities have shown better working conditions, safety, and overall wellbeing for seafarers, which is a positive development for the industry and its workforce.

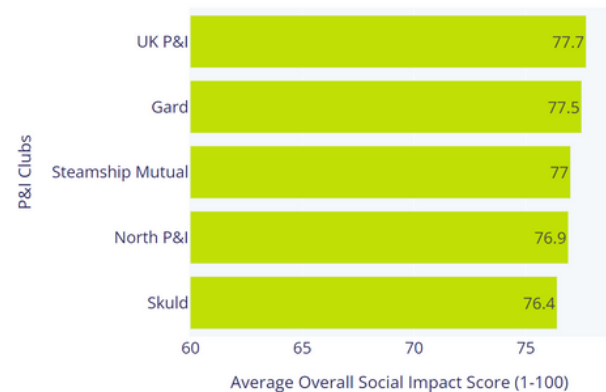
Highest Performing Class Societies of the Ten Largest



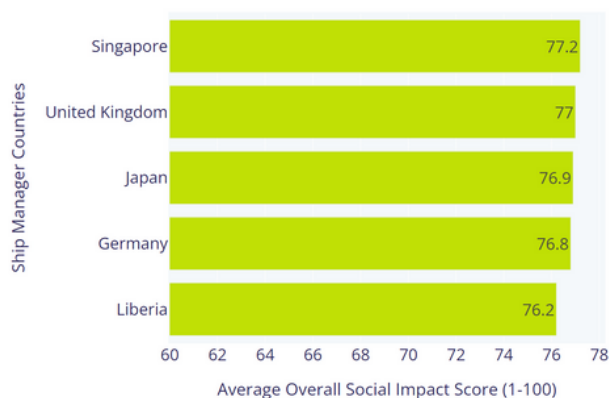
Highest Performing Flags of the Ten Largest



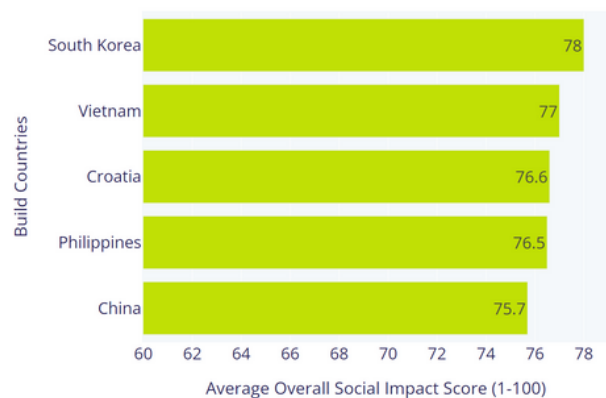
Highest Performing P&I Clubs of the Ten Largest



Highest Performing Ship Manager Countries of the Ten Largest



Highest Performing Build Countries of the Ten Largest



Bridging the Gaps

Insights into shipboard conditions and seafarer welfare are vital yet hard to access for stakeholders seeking to improve life at sea and address ESG gaps.

We believe that this report reveals real seafarer concerns and provides the missing intelligence that enables accountable, enlightened maritime decisions upholding social responsibility.

It is seen as vitally important to propose strategies and recommendations for integrating seafarers' welfare into maritime industry ESG approaches whilst also ensuring that best practices from companies who have successfully incorporated social considerations into their ESG frameworks are transparent and shared.

By producing our findings in this report, we aim to:

- empower stakeholders to make responsible management, chartering and insurance decisions aligned with their ESG commitments
- enable ship operators to showcase achievements, target investments effectively, and strengthen their social credentials

Overall, we want to improve life and work at sea, and we believe that our social impact methodology can help steer the industry towards a sustainable model that values seafarers as partners.

Interested to find out how crew conditions on board your vessels compare to the average?

Contact us at enquiries@idwalmarine.com to discuss





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