ICMM Ships Committee
Historic Vessels Needs & Priorities Survey Analysis Report

1. Executive Summary

This report presents the findings of the ICMM Ships Committee Historic Vessels Needs and Priorities Survey, undertaken to inform the future direction and priorities of the Committee.

The survey received 41 responses, representing approximately one-third of ICMM membership. The dataset captures a broad cross-section of institutions responsible for historic vessels and provides a robust basis for analysis.

The findings indicate that institutions are operating within a set of interrelated structural constraints that function as a compound system. Funding was identified as a primary challenge by 88% of respondents, however the issue is not solely the availability of funding, but the ability of institutions to access and sustain it over time. 73% identified shortages in skills and expertise.

These constraints have direct implications for the preservation of historic vessels and reinforce one another in practice, with limited funding restricting maintenance, skills shortages limiting delivery, and environmental exposure accelerating deterioration. A total of 53% of respondents reported that vessels in their care are at moderate or high risk of loss within the next 5–10 years. This level of risk is observed across institutions of different sizes, indicating that it reflects systemic pressures rather than isolated cases.

The survey also highlights limited organisational capacity. A total of 41% of respondents reported that only one or two full-time equivalent staff are responsible for vessel preservation and maintenance, while 76% rely on volunteer labour to some extent.

Comparison with research undertaken in the United Kingdom by the National Lottery Heritage Fund and National Historic Ships UK demonstrates a strong degree of alignment in key themes. Both datasets identify a sector in which funding constraints, skills shortages, and rising costs limit the ability of organisations to undertake conservation work, even where appropriate standards are understood. While this evidence is UK-specific, the alignment with survey responses suggests that similar structural challenges may exist more widely.

The findings suggest that funding, skills, and standards are interdependent. Without

sufficient access to funding and expertise, the consistent application of conservation standards becomes difficult to achieve in practice.

2. Introduction and Purpose

The ICMM Ships Committee advocates for historic and traditional vessels in maritime heritage by promoting their continued use, conservation, and interpretation for public benefit, with community participation.

One of the Committee's objectives is to identify sources of information, evaluate national and international guidance and policy frameworks, and disseminate best practice.

To ensure that its work is effective, global, and of practical value to members, the Committee initiated the ICMM Ships Committee Historic Vessels Needs and Priorities Survey.

The survey was designed to gather evidence on the scale and nature of historic vessel collections, the challenges associated with their care, and the forms of support required from ICMM.

The findings of this report are intended to inform discussion on the future role, priorities, and objectives of the Committee.

3. Profile of Respondents

The survey received 41 responses from institutions responsible for historic vessels, representing approximately one-third of ICMM membership. This constitutes a strong response rate for a voluntary international survey and provides a credible basis for analysis.

A total of 59% of responses were received from European institutions, with additional representation from North America and Oceania, and more limited participation from Asia, South America, and Africa. This broadly reflects the structure of ICMM membership, although some regions are under-represented.

Respondents represent a wide range of institutional scales. Approximately 34% reported annual budgets below €500,000, while 29% reported budgets exceeding €3 million. A total of 37% of respondents manage more than 20 vessels, indicating that a significant proportion of institutions are responsible for complex and resource-intensive collections.

These findings demonstrate that the dataset reflects a diverse and representative cross-section of the sector.

4. The Operating Reality of Historic Vessels

Historic vessels require ongoing maintenance, specialist expertise, and sustained financial investment, and differ fundamentally from most other forms of heritage asset in that they are subject to continuous environmental exposure, require ongoing intervention to prevent deterioration, and often operate within complex regulatory frameworks. Institutions preserve vessels in a range of contexts, including afloat, ashore, indoors, and outdoors, each of which has distinct conservation and operational implications.

Survey responses indicate that institutions are not operating within a single model of preservation. Survey responses indicate that the majority of institutions manage both static display and some form of active use, including education, events, or operational activity. This confirms that institutions are typically managing mixed-use collections rather than choosing between static and operational models.

This complexity is reflected in wider sector evidence. Data from National Historic Ships UK indicates that approximately 44% of vessels are in operational use, 40% are static, and 16% are under or in need of restoration. This broadly even distribution reinforces the conclusion that institutions must operate across multiple conservation approaches simultaneously.

The distinction between operational and static vessels is not simply descriptive, but has direct implications for conservation practice. Static vessels can be managed with a focus on stabilisation and preservation of fabric, whereas operational vessels require ongoing intervention, including replacement of materials and compliance with regulatory frameworks. Institutions managing both types must therefore balance competing priorities, often within constrained resources.

Respondents operating historic vessels also highlight increasing constraints arising from regulatory requirements and skills availability, including the impact of emissions standards and the need to maintain trained volunteer crews.

Taken together, these factors indicate that historic vessels represent a distinct category of heritage asset, requiring approaches that differ from those applied to static collections or built heritage.

5. Core Challenges Facing the Sector

The survey results show a high degree of consistency in the challenges identified by respondents, with a clear hierarchy of constraints.

Funding was identified as a primary challenge by 88% of respondents, reflecting the high and ongoing costs associated with vessel maintenance and conservation. These costs include not only periodic major interventions, but also continuous maintenance

requirements that cannot be deferred without increasing long-term risk. In many cases, respondents describe specific conservation programmes requiring investment at the level of hundreds of thousands or millions of pounds, reinforcing the scale of the financial challenge identified in the survey data.

Skills shortages were identified by 73% of respondents, particularly in specialist areas such as shipwrighting, marine engineering, and historic rigging. More detailed responses indicate that specific gaps include fundraising capability (39%), historic rigging (37%), shipwrighting (34%), and hull maintenance (29%), demonstrating that the issue extends beyond technical skills to include organisational capacity.

Environmental and operational factors were identified by 34% of respondents. While ranked below funding and skills in survey responses, environmental exposure should not be understood as a secondary or situational issue, but as a defining condition of historic vessels, requiring continuous intervention and amplifying the impact of funding and skills constraints.

This interpretation is reinforced by evidence from National Historic Ships UK, which identifies environmental exposure as a structural and increasing pressure. Climate change is already contributing to coastal erosion, flooding, increased corrosion, and more frequent extreme weather events, all of which increase the need for ongoing maintenance and accelerate material deterioration.

A second tier of challenges is also evident, including understanding conservation techniques (22.5%), balancing preservation and access (17.5%), and access to traditional materials (12.5%), all of which further complicate delivery.

Taken together, these findings indicate that many of the primary challenges facing the sector are structural in nature, rather than purely situational. Institutions are operating within conditions that systematically limit their ability to undertake conservation work.

6. Capacity and Risk

The survey reveals a significant level of risk across the sector. A total of 53% of respondents reported that vessels in their care are at moderate or high risk of loss within the next 5–10 years.

This level of risk must be understood in relation to institutional capacity as reported by respondents. A total of 41% of respondents reported that vessel preservation and maintenance are undertaken by one or two full-time equivalent staff, while approximately 17% reported less than one full-time equivalent or no dedicated staff.

Volunteer labour plays an important role in many institutions, with 76% of respondents indicating some level of reliance on volunteers. However, this reliance varies significantly, with some institutions reporting heavy dependence. While volunteers provide valuable support, they do not replace the need for specialist expertise in technically complex areas.

Importantly, risk is not confined to smaller institutions. Respondents across all budget categories report similar levels of vulnerability, suggesting that these pressures are systemic and not limited to organisations with the least resources.

In some cases, this constraint is expressed in very direct terms, with respondents describing their primary objective as maintaining vessels in a stable condition within available resources, rather than undertaking planned conservation programmes: ‘keep the boats afloat without running out of money’.

These pressures are likely to intensify. Evidence from the UK indicates that climate change is increasing both the frequency and severity of environmental impacts on historic vessels, including storm damage, material degradation, and operational disruption. This reinforces the conclusion that current levels of risk are not static, but are likely to increase over time.

7. Skills, Knowledge, and Resource Gaps

Respondents also highlighted the need for practical resources, including access to contractors (37%) and technical guidance (41%). The nature of this demand is notably practical, with respondents emphasising the need for applied knowledge, including case studies, training, and real-world examples, rather than purely theoretical guidance.

Fundraising capability was identified by 39% of respondents as a key area of need. This reflects the broader financial pressures identified elsewhere in the survey and indicates that institutions require not only funding, but also the ability to access it effectively.

Technical skills gaps are also prominent. In addition to the 73% of respondents identifying skills shortages overall, specific areas of need include historic rigging (37%), shipwrighting (34%), and hull maintenance (29%). These are highly specialised skills, often associated with traditional maritime industries, and are not widely available. In many cases, these skills are associated with ageing workforces and limited training pathways, raising longer-term concerns about the sustainability of the skills base required to maintain historic vessels.

Respondents also highlighted the need for practical resources, including access to contractors (37%) and technical guidance (41%). These responses indicate that institutions are seeking actionable support that can be applied directly to conservation and maintenance work.

Taken together, these findings demonstrate that the sector faces a combination of financial, technical, and organisational challenges that cannot be addressed in isolation.

8. What Members Want from ICMM

The survey provides a clear indication of the forms of support that institutions would find most valuable from ICMM.

Funding support was identified by 78% of respondents as a priority. This includes assistance in identifying funding opportunities as well as strengthening institutional capability in areas such as fundraising, financial planning, and partnership development. This emphasis reflects not only the scarcity of funding, but also the complexity of accessing it, with respondents highlighting the need for support in navigating funding systems, developing applications, and establishing more sustainable financial models.

This emphasis reflects the central role of funding constraints in shaping institutional capacity.

Technical guidance was identified by 41% of respondents, while 37% highlighted the need for access to contractors. These responses indicate that institutions are seeking practical tools and resources that enable them to undertake work, rather than purely advisory outputs.

Networking and collaboration were identified as important by 34% of respondents. This is reinforced by the finding that 88% of respondents expressed willingness to collaborate with other institutions, and 61% indicated interest in mentoring or skills-sharing programmes. These figures suggest that the ICMM network represents a significant, but currently underutilised, resource. Networking should therefore be understood not simply as a supplementary activity, but as core sector infrastructure enabling access to funding, skills, and knowledge.

Training and skills development were also identified as priorities, reflecting the broader skills shortages discussed earlier in the report. The responses are notably direct in this respect. In many cases, respondents identify funding, access to expertise, or networking as their primary requirement without qualification. This reinforces the conclusion that institutions are seeking support that enables action, rather than guidance in isolation.

9. Interpreting Sector Priorities

The relatively limited emphasis placed by respondents on conservation standards can be interpreted in a number of ways and should not necessarily be taken to indicate that

standards are unimportant . Rather, it reflects the conditions under which many institutions are operating.

These conditions also give rise to a set of recurring strategic trade-offs. Institutions must balance preservation against access, authenticity against regulatory compliance, operational use against conservation, and capital investment against ongoing maintenance. These are not marginal issues, but central to decision-making across the sector.

Climate change further sharpens this dynamic. Research by National Historic Ships UK demonstrates that historic vessels are particularly vulnerable to environmental change due to their materials, exposure, and operational context. The resulting increase in deterioration, maintenance requirements, and operational uncertainty reinforces the prioritisation of funding and skills identified in the survey, as institutions respond to immediate and escalating pressures.

With 88% of respondents identifying funding as a primary challenge and 73% identifying skills shortages, many institutions are constrained in their ability to undertake conservation work at all. Where work is undertaken, it is often shaped by the availability of resources and expertise, which may limit the extent to which formal conservation frameworks can be applied in practice.

Evidence from the United Kingdom reinforces this interpretation. Research undertaken by the National Lottery Heritage Fund and National Historic Ships UK identifies similar patterns, with 72% of respondents reporting lack of funds for conservation and 70% reporting lack of funds for ongoing maintenance. The same research highlights that high costs mean that vessel custodians cannot always implement what they recognise as best practice.

In this context, conservation practice is often shaped by the skills that are available. Wider sector evidence suggests that work may, in some cases, default to approaches derived from boatbuilding or ship repair, rather than conservation-led methodologies. This reflects both the limited availability of specialist conservation expertise and the practical realities of maintaining complex assets within constrained resources.

This may reflect not a lack of interest in standards, but a lack of capacity to implement them fully. Funding, skills, and standards should therefore be understood as interdependent. The ability to apply conservation standards in practice is contingent on access to both financial resources and appropriate expertise.

Respondents also highlight, in a number of cases, challenges arising from the regulatory classification of historic vessels, particularly where they are treated primarily as operational ships rather than as heritage assets. This can result in disproportionate

compliance requirements and reduced access to funding, reinforcing the need for clearer recognition within policy frameworks.

10. Strategic Implications

The survey findings have several implications for the future role of the ICMM Ships Committee.

First, the challenges identified are systemic rather than isolated. The consistency of responses across institutions of different sizes and regions suggests that funding constraints, skills shortages, and capacity limitations are structural features of the sector.

Second, institutions require practical support that enables them to undertake work in practice, particularly in navigating funding systems, accessing expertise, and applying knowledge in constrained conditions. This includes access to funding, technical expertise, and operational resources.

Third, there is significant potential for collaboration across the ICMM network. The high levels of willingness to collaborate and participate in mentoring indicate that the network itself represents a substantial resource that is not yet fully utilised.

These findings suggest that the Committee may need to adopt a more active role in coordination, facilitation, and advocacy. This includes not only supporting the development and dissemination of standards, but also addressing the conditions under which those standards can be applied.

11. Conclusion

The survey demonstrates that institutions responsible for historic vessels are operating within a constrained environment defined by funding, skills, and capacity limitations.

These challenges are consistent with wider sector evidence and suggest that they are systemic in nature.

In this context, funding, skills, and standards must be understood as interdependent. Without sufficient access to funding and expertise, the consistent application of conservation standards is difficult to achieve in practice.

The ICMM Ships Committee is well placed to respond to these challenges by supporting coordination, facilitating access to expertise, and advocating for the recognition of historic and traditional vessels as an important component of maritime cultural heritage.