

# UK Maritime Services

## Capability Review 2020

Promoting the UK's world-class maritime services offer





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## Foreword

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**Maritime professional services have been at the heart of both the UK's and London's economy for centuries, reflecting the country's historical role as a leading maritime and trading nation. As revealed in the Maritime London report 'Catching the Wave - UK maritime professional services competitiveness study' published by Maritime London in support of the government's flagship 2050 Strategy the sector is worth \$6bn GVA, provides 10,000 skilled jobs and has a 25% share of the global market, making the UK the world's leading provider.**

While the UK remains the clear leader in maritime professional business services, there is no room for complacency, and it is for this reason that I am heartened by the enhanced support being provided by the Department for International Trade, as we look to promote proactively the unique strength and offer of the sector, around the world.

What makes the UK stand out as a provider of maritime professional services, is the unparalleled strength and depth of the UK cluster, and the companies represented in this document are a mere snapshot of the number of specialists in any particular field. The UK truly is a one-stop for all your commercial management needs. Whether it be chartering, classification, insurance, maritime law, the facilitation of finance or indeed other specialisations, I strongly believe there is no better market in the world to place your business. Furthermore, in an increasingly uncertain commercial shipping environment, the certainty and security provided by the institutions that envelop the UK market give us a unique competitive advantage as we serve the needs of the global commercial fleet.

If we are to maintain and grow our market share a strong partnership with the government is vital. This brochure not only provides an overview of the sector but serves as an overt, physical representation of the Department for International Trade's support of it.



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**Lord Mountevans**  
*Chairman*  
*Maritime London*

# Introduction to UK maritime services

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For centuries the UK has been the home of many forms of maritime business. The services these supply span the international needs of the industry. World-leading companies in areas such as maritime law, insurance, finance, consultancy and shipbroking, service the global maritime industry.

The breadth and diversity throughout the UK maritime sector is one of its greatest strengths, and an unparalleled tradition of excellence in legal, arbitration, insurance, P&I, shipbroking and finance makes the UK the first choice for those in the international shipping community seeking maritime business services of the highest quality.

UK maritime services are supported by a highly skilled pool of expert maritime professionals, with the vast wealth of knowledge available across the financial sector – in which the City of London leads the world. London is home to the leading source of market information on the trading and settlement of physical and financial shipping derivatives in the Baltic Exchange, with the majority of the Exchange's members based in London.

The interaction between the various professions is a key advantage, enabling quick and expert solutions to shipping related challenges. This cross pollination and the maritime eco-system surrounding it, ensures that in a competitive market the UK culture of excellence ensures that clients can access the innovative, trusted and respected expertise they need. With companies possessing real understanding and a deep knowledge of the industry.

- The UK has a c.25% share of the global marine insurance market and employs 6000. The UK has 70% share of the market in offshore energy.
- Eight of the 13 Protection & Indemnity Clubs are managed from the UK.
- There are over 400 UK based law firm partners focus on maritime law, more than twice as many as the nearest competing centre.
- English law is the global industry standard and the UK boasts unrivalled legal and judicial expertise on shipping, insurance and international trade matters. Indeed, 80% of global maritime disputes are arbitrated in London.
- Seven of the top 20 shipbroking firms are headquartered in London.
- Lloyd's Register is one of the four large global classification societies which between them class over 70% of the global fleet.
- The UK is the third largest location for third party ship management and is home to V Group, the world's largest provider.
- The professional maritime services sector is estimated to employ 10,000 UK consultants provide vital expertise to support shipping the world over.
- UK maritime Training and education is regarded as the gold standard.

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*“Heritage, diversity, skilled people, a close network and excellence all shape the UK maritime services offer.”*

**Sean Moloney**  
**Shipping Innovation Ltd**



The Department for International Trade (DIT) has developed a 5-year plan promoting the UK's world class global maritime offer.

The plan was developed with industry to promote and access global opportunities for products, services and investments of the UK's maritime sector. It presents collaborative measures and commitments from both DIT and the industry focussed on supporting the UK's maritime exports.

*“Supporting the UK Maritime services sector to secure exports and win business abroad.”*

***The Department of  
International Trade***



### **The plan aims to:**

- Support the UK maritime sector to capture significant global market share in important technologies to improve the environmental performance of the global maritime fleet.
- Help the UK maritime sector become an acknowledged world-leader in the adoption of digital technologies and associated business services, including legal and insurance services for autonomous vessels.
- Promote the UK's strong capability in maritime science globally.
- Maintain the UK's number one position for maritime services against increasing global competition.

### **The plan's focus areas include:**

- Autonomous vessels
- Digital shipping
- Green shipping
- Marine science
- Maritime services

These were highlighted in the trade chapter of Maritime2050 and align with the grand challenges sighted in the industrial strategy.

The strategy identifies measures to encourage, inform, connect and finance UK companies to improve their contribution in global maritime exports, following the approach of the strategy.

Inside this document, it is possible to see how the UK maritime services sector can deliver on the needs of the industry, and provides the vital tools, capability, skills and understanding to translate challenges into results.

# Classification and certification

**The history of ship classification can trace its roots directly back to 1760 when London's merchants, bankers, shipowners and captains created the mechanisms surrounding maritime risks, and of how they could be shared or transferred.**

Key to this was an understanding of the condition of each ship, and so a register of ships was produced, compiled by Lloyd's Register (LR). Others followed and the Classification Society model was born. These non-governmental organisations are vital in maintaining technical standards for the construction and operation of ships and offshore structures.

The construction of a vessel must comply with relevant standards, and a classification certificate issued by a Classification Society is needed to register a vessel with a flag State, as well as to place it under insurance cover. Without being "in class", a vessel cannot trade and so the role of Classification Societies is vital to the way in which the entire shipping industry functions.

In addition, many flag States outsource their own survey and inspection responsibilities to Classification Societies, who also provide certification services in a wide range of operational areas, from maritime safety and security, through to environmental standards and more besides.

Lloyd's Register is not only the most historic name, but today it continues its pivotal role in the industry. Today the organisation has grown from its ship related beginnings to encompass many business areas, however its marine and offshore business is still hugely important.

Amongst the leading Classification Societies, all have a presence in London, as well as around major UK ports. They also form the International Association of Classification Societies (IACS) and through this have an influential voice within the International Maritime Organization (IMO). The IACS Secretariat is headquartered in London and ensures that the UK retains a vital role in the provision of classification for vessels.



[www.lr.org](http://www.lr.org)

*"The notion of Classification Societies was conceived in the UK, and that means both heritage and longstanding excellence come to the fore in making ships safe, clean secure and efficient."*

**Alastair Marsh**  
**Chief Executive**  
**Lloyd's Register**

# Innovation

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**Maritime innovation has become an important focus of the industry. Internationally, shipping companies are seeking innovative solutions to old and new problems alike.**

The shipping industry is at the beginning of a period of fundamental change. With the rise of connectivity at sea, the moves towards digitisation, and away from fossil fuels, we are set to see almost every aspect of the industry's operating model change and evolve over the next three decades. There is a green revolution shaping the industry, which needs new thinking on old problems.

In response to this, the UK has become a driving and influential force behind many maritime start-up companies. These disruptors are seeking to innovate as they find new ways to address the needs of shipping, the maritime industry and even the client base beyond.

As the need for change accelerates, and as the start-up sector gains exposure, the industry and investors are focusing more attention on the solutions which these innovative companies can offer. The maritime industry is seeking the answers to issues such as the blockchain, and cloud computing, and increasingly a new "ShipTech" market is on hand to service these needs.

The maritime industry has been a place of tradition and custom, however, new rules, regulations, and the demands of society and customers mean that the current systems and processes are changing, and the UK has companies which are pioneering innovation. We are leading the way with independent hubs and incubator organisations providing a natural home for start-ups, innovators and new ideas. There is a maritime business transformation taking place, and UK start-ups are proudly forging ahead.

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*"Global shipping needs the solutions which innovative ideas, products, designs and processes deliver. Maritime start-up companies are vitally important in finding the answers needed, and many such companies are based in the UK."*

**Leonardo Zangrando,  
Founder & Managing Director  
Startupwharf**





[www.new.abb.com/marine](http://www.new.abb.com/marine)



[www.antrigulum.ai](http://www.antrigulum.ai)



[www.arcmarine.co.uk](http://www.arcmarine.co.uk)



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[www.marri-uk.org](http://www.marri-uk.org)



[www.navitron.co.uk](http://www.navitron.co.uk)



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[www.startupwharf.com](http://www.startupwharf.com)



[www.sonardyne.com](http://www.sonardyne.com)

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## Maritime consultancy

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**The maritime consultancy landscape in the UK is incredibly diverse and delivers to the highest possible standards based on a longstanding experience and unparalleled expertise. There are market leading companies providing a wide range of support services to the global maritime industry. Maritime consultancy takes many forms and covers the whole breadth of the needs of clients.**

Access to appropriate maritime consultants could not be easier than in the UK, with companies clustered around London and major ports. UK providers are respected globally, and provide the advice, guidance, insight and support which make a positive difference to the ways in which their clients conduct business.

There is an incredible array of services on offer, and many companies will be able to provide solutions to clients which cross boundaries from one area to another. The services encompass all manner of areas, from cargo and casualty work, to technical, port, engineering support, as well as scientific analysis. There is also a strong focus on management systems and quality, while inspection, surveying, auditing and investigations feature strongly too.

In addition, UK maritime consultants plug in seamlessly to wider eco-system, and often work with other service providers such as lawyers and insurers to provide litigation support in legal cases and expert witness testimony.

The growth of analysis, big data and research are also important offerings, and consultants have been quick to innovate and to ensure that whatever their clients need, then they can be provided.

UK maritime services consulting firms can assist at the earliest stages of a project to head off problems, but also there to mitigate the risks at all phases. While if the worst has happened, then they can help to ensure that problems are dealt with as swiftly and effectively as possible.

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*“UK maritime consultants have deep knowledge and hard-won experience, which benefits their clients and helps to get results.”*

**James Wilkes**  
**Managing Director**  
**Gray Page Ltd.**



[www.abpmer.co.uk](http://www.abpmer.co.uk)



[www.becketttrankine.com](http://www.becketttrankine.com)



[www.brookesbell.com](http://www.brookesbell.com)



[www.bowaldsenergy.com](http://www.bowaldsenergy.com)



[www.burgoyne.com](http://www.burgoyne.com)



[www.dalesmarine.co.uk](http://www.dalesmarine.co.uk)



[www.fnc.co.uk](http://www.fnc.co.uk)



[www.idwalmarine.com](http://www.idwalmarine.com)



[www.loc-group.com](http://www.loc-group.com)



[www.marico.co.uk](http://www.marico.co.uk)



[www.moffattnichol.com](http://www.moffattnichol.com)



[www.nathanmillsmarine.com](http://www.nathanmillsmarine.com)



[www.nectargroup.co.uk](http://www.nectargroup.co.uk)



[www.orcadesmarine.co.uk](http://www.orcadesmarine.co.uk)



[www.safeguardengineering.co.uk](http://www.safeguardengineering.co.uk)



[www.sea.co.uk](http://www.sea.co.uk)



[www.stonemarineservices.com](http://www.stonemarineservices.com)



[survitecgroup.com](http://survitecgroup.com)

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## Maritime financial services

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**The Finance and shipping have long had a dynamic interaction. Access to funding and the mechanisms have evolved to fit the changing operational and regulatory environment, the needs of the industry, the returns versus risks generated.**

The past decade though has been one of immense change, and a range of new ship finance structures have developed. This has impacted conventional ship financing deals through traditional banks but has also been a time of innovation and the emergence of new players.

Challenges in ship finance and lending have meant some ship finance banks have exited shipping and sold their portfolios on. Increasingly then, private equity, shareholders, and capital markets and bonds, are emerging and filling funding gaps.

New approaches and solutions have emerged, and funding structures such as high-yield bonds, convertible debt, capital and operating leases, as well as preferred equity structures are coming to the fore. Which means the UK, with its strong financial standing can service these new approaches.

The UK market, particularly centred on London, is a leading centre for the provision of capital for the construction of vessels and the purchase of second-hand tonnage, with UK market providing access to leasing, corporate financing and public bond issues. There is also a major focus on new green finance options, and the market is embracing new approaches.

There is more to the UK offering too, and ancillary financial services, such as freight collection, foreign exchange dealings, remittances, sale and purchase completions as well as consultancy and advisory services are vital additional elements in the ship finance scene. The UK is home to many of the other financial related services including accountancy, consulting, insurance and legal. Various leading exchanges and funds are based in the UK working at the forefront of financial innovation, and so are well-placed and committed the future.

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*“As traditional finance models evolve, the attraction of the London market is the sophisticated and modern approach to funding shipping projects.”*

**David Smith**  
**Director**  
**PricewaterhouseCoopers LLP**



[www.bdo.co.uk](http://www.bdo.co.uk)



Law . Tax

[www.cms-lawnow.com](http://www.cms-lawnow.com)



[www.marine-capital.co.uk](http://www.marine-capital.co.uk)



[www.pwc.co.uk](http://www.pwc.co.uk)



## Maritime law

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**English law, and submission of disputes to the jurisdiction of the English courts or, most commonly, arbitration in England, remains the most frequent choice for parties throughout the shipping industry internationally. This, and the wide use of English law in international ship finance transactions, has ensured that London is the world's leading centre for the provision of legal services to the international maritime community.**

English contract law, which is mainly derived from the Common Law, is applied to shipping disputes far more widely than the law of any other country and is the governing law of choice for many international businesses when entering into commercial contracts.

With its independent judiciary and established system of legal precedent, English law and dispute resolution services provide businesses with certainty and clarity when engaging in cross-border commercial activity. Though there is flexibility too. As English law is not restricted by a written code, it is able to adapt rapidly to new developments in shipping and international business. It also recognises “freedom of contract” and, in arbitration “party autonomy” and so aims to give effect to the contractual intention of commercial parties. Almost uniquely England offers a right of appeal from an arbitration award on a point of law (something which is not ordinarily available in other major maritime centres), Thus, it is the basis of conducting business with a high degree of certainty and with safeguards.

Another unique and attractive aspect of the English legal system is the ability of the winning party to recover the majority of costs - not merely tariff or administrative fees, which helps discourage baseless claims simply to force a settlement. While court fees are low and because of the number of experienced judges and arbitrators available, cases can be heard quickly and, where necessary, urgently. English qualified judges and arbitrators are best qualified to determined English law disputes.

The pre-eminence and use of English law means that the UK is a global maritime arbitration centre, and legal services in the maritime sector are routinely required for contentious and non-contentious work relating to a wide range of matters including charterparties, ship and rig building contracts, and agreements concerning finance, commodities, energy, insurance, cargo, collision, salvage, general average and pollution. Many disputes are decided in the specialised Admiralty and Commercial Courts, or through arbitration and various other private forms of dispute resolution including mediation.

Maritime lawyers and firms in the UK are widely respected and recognised, and they provide world class support for their clients, both in cases brought in the UK, but so too in advising on the structuring and documentation of maritime and financial transactions and assisting in settlement of disputes short of litigation or arbitration.

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*“English maritime lawyers are respected, not only for their skill and knowledge, but their tenacity and for getting results for their clients. London maritime arbitration leads the world in maritime dispute resolution by a clear margin.”*

**Ian Gaunt - President  
The London Maritime Arbitrators Association**



[www.admiraltysolicitorsgroup.com](http://www.admiraltysolicitorsgroup.com)

**AS** Anderson  
Strathern

[www.andersonstrathern.co.uk](http://www.andersonstrathern.co.uk)

**Andrew Jackson**  
Solicitors LLP

[www.andrewjackson.co.uk](http://www.andrewjackson.co.uk)

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[www.brodies.com](http://www.brodies.com)



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**WIKBORG | REIN**

<https://www.wr.no/en/>

**Winter Scott**  
Solicitors

<https://www.winterscott.co.uk/>

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## Marine insurance

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**There are many potential risks in shipping, and insurance is crucial in dealing with them. Without the capacity to mitigate and transfer risks the potential losses if vessels or cargoes were to be lost would be too great, so this is a vital mechanism for shipowners.**

The UK is central to the modern marine insurance market. Indeed, London remains the world's leading centre for marine insurance. Whether placed through Lloyd's of London or company members of the International Underwriting Association (IUA), insurers handle the insurance needs of the shipping community. Cover provided includes hull and machinery insurance, war risk insurance, loss of profit/freight insurance, detention insurance, strike insurance or uninsured legal expenses (defence) cover.

Lloyd's of London is made up of syndicates underwriting risks, through Lloyd's brokers. These use their specialist knowledge to negotiate competitive terms and conditions, place risks on behalf of clients.

There is also a separate London Company market, in which the world's top insurance and reinsurance companies are active in marine insurance. All marine business is underwritten here, including hull, cargo, energy, liability, specie and war risks. In addition, the Average adjusters play a vital role in advising on and adjusting marine claims.

The UK is also home to specialist associations also providing Protection and Indemnity (P&I), the majority of which are from or have management offices here. These provide third party liability and legal expenses insurance on a mutual basis for owners, operators and charterers of ships.

It is not only the insurance markets, underwriters, agents and brokers which are in the UK. London is home to a number of key organisations which are vital to the management and representation of the marine insurance industry. These include, the London & International Insurance Brokers Association, the International Underwriting Association, and the International Group of P&I Clubs.

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*“UK marine insurers have trusted products, the right connections to specialised markets, and an unparalleled ability to respond to the needs of clients.”*

**Neil Roberts**  
**Head of Marine and Aviation**  
**Lloyd's Market Association**



[www.bmsgroup.com](http://www.bmsgroup.com)



<https://britishmarine.com>



<http://www.charlestaylor.com/adjusting>



[www.concirus.com](http://www.concirus.com)



[www.crewsure.com](http://www.crewsure.com)



[www.lmalloyds.com](http://www.lmalloyds.com)



[www.nepia.com](http://www.nepia.com)



[www.optimiz.claims](http://www.optimiz.claims)



[www.shipownersclub.com](http://www.shipownersclub.com)



[www.standard-club.com](http://www.standard-club.com)

## Media, marketing and public relations

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**As far back as the early 18<sup>th</sup> Century, around the same time as Lloyd's Register began assessing and recording the standard of ships, and the Lloyd's market began to shape marine insurance, Lloyd's List began to publish news and information about shipping. Indeed, hundreds of years ago, London saw the kind of maritime eco-system and clustering effect which is so important to the industry even today.**

Lloyd's List is one of the world's oldest continuously-running journals, having initially provided weekly shipping news in 1734. It started as a reliable and concise source of information for the merchants' agents and insurance underwriters who met regularly in the Lloyd's Coffee Shop to negotiate commercial arrangements, and insurance for vessels and cargoes.

The paper now sits at the heart of a multinational company with a network of events, intelligence and scholarly publishing. However, it also helped give rise to the UK as a world leader when it comes to maritime business journalism, publishing, media management and events.

The long history of links between the shipping industry and reporting, analysis, the media and journalism has supported the development of another important side of the industry, marketing, communications and public relations. There are important and influential companies who work with the maritime industry, providing world class thought leadership and support, which can help their clients to win business, but also manage threats too.

The UK has strong expertise and a global footprint in assisting companies to manage any potential risks to their reputation. Assisting them in maintaining positive relationships, and in protecting their standing with a host of important stakeholders. UK companies are at the fore when it comes to getting their client's message to the wider industry, as well as supporting when things go wrong and communications need to be managed and controlled.

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*“The UK is a world leading maritime nation and it is supported by world class communicators. We have some of the best people with great stories to tell and the vibrant media and PR functions across the UK promotes and defends our £46bn a year maritime sector.”*

**Alastair Clifton**  
**Director of Communications**  
**UK Chamber of Shipping**





[www.blue-comms.com](http://www.blue-comms.com)



[www.elabor8.co.uk](http://www.elabor8.co.uk)



[www.imageline.co.uk/](http://www.imageline.co.uk/)



[www.j-l-a.com](http://www.j-l-a.com)



[www.navigatepr.com](http://www.navigatepr.com)



[www.navigateresponse.com](http://www.navigateresponse.com)



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[www.polarismedia.co.uk](http://www.polarismedia.co.uk)



[www.rivieramm.com](http://www.rivieramm.com)



[www.saltwater-stone.com](http://www.saltwater-stone.com)



[www.shippinginnovation.com](http://www.shippinginnovation.com)



[shipmanagementinternational.com](http://shipmanagementinternational.com)



[www.wake-media.co.uk](http://www.wake-media.co.uk)

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## Naval architects and ship designers

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**Naval architecture is the art and science of vessel design. Naval architects specialise in the design, construction, conversion, repair, surveying and decommissioning of ships, boats and offshore structures. Their calculations create vessels which are a stable, seaworthy and have adequate strength and performance to give economic propulsion and safe, efficient and comfortable motion at sea.**

They are primarily involved in the design of vessels but may manage the whole process from the design board to the finished vessel. Providing clients with engineering solutions, technical and commercial guidance, support and project management for concept design studies, new vessel constructions, refits and conversions.

Apart from the architectural aspects of ship form and layout, they must be able to use complex mathematical and physical models to ensure designs are technically correct and meet the relevant rules and regulations. Their work includes planning the construction process, identification of materials, fitting-out and testing. They also provide solutions for specialised technical problems, such as ensuring the correct cargo handling capabilities.

Naval architects work with shipbuilders and repairers, and also shipping companies as they develop the best designs for clients. They may also work with Classification Societies, alongside marine engineers and nautical surveyors to carry out tests and surveys to ensure vessels retain their integrity. They are often also involved in research, bringing in new technological innovations and advanced design and production methods and ensuring that existing technology works as efficiently as possible.

The UK has a distinguished history of vessel construction, repair, maintenance and conversion, underpinned by leading names in naval architecture. There is a vast amount of experience in the UK, and this is fed by world class education in naval architecture in a number of UK universities. The professional institution Royal Institute of Naval Architecture (RINA) is based in London.

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*“UK Naval Architects have the knowledge to deliver a leading the very highest quality of design, insight and support to clients.”*

**Sylvain Julien**  
**Director Naval Architecture**  
**BMT Specialised Ship Design**

**BAE SYSTEMS**

[www.baesystems.com](http://www.baesystems.com)



Clarity from complexity

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[www.cammell-laird.co.uk](http://www.cammell-laird.co.uk)



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<https://servowatch.com>



[www.solis-marine.com](http://www.solis-marine.com)



[www.stonemarineshipcare.com](http://www.stonemarineshipcare.com)



[www.stellersystems.co.uk](http://www.stellersystems.co.uk)



[www.tymor-marine.com](http://www.tymor-marine.com)



<https://www.qinetiq.com>



[www.rina.org.uk](http://www.rina.org.uk)



<https://www.wsp.com/en-GB/sectors/maritime>

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## Skills and people

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**Shipping remains a people focused business, with seafarers who operate vessels 24 hours a day, 365 days a year all over the world, and office staff supporting them. The UK is a leading provider of the services which allow maritime professionals and seafarers to achieve, whether that is the safe and efficient operation of vessels, or the maritime services which facilitate them.**

While the proportion of UK seafarers has dropped, there remain many leading manning and personnel agencies which operate out of key UK locations. These companies act as a conduit between ship owners and managers, using their vast expertise to ensure their clients have the right people they need for their business.

Professionalism in the maritime sector is hugely important, and the UK has long been at the fore in addressing this, indeed, the world's most influential maritime professional bodies are headquartered here. IMarEST and the Nautical Institute are market leaders in their dedicated sectors, and provide guidance to industry, as well as publishing important industry texts.

Looking ashore, the UK has some of the world's most respected maritime recruitment businesses. These companies specialise in finding the best talent for their clients and have unrivalled expertise and contacts. The Maritime HR Association, which draws together many of the world's most respected and recognised shipping companies on human resource issues is based in the UK.

There are other aspects of dealing with people at sea, and these come in many different forms. From travel services and management to even providing entertainment, news and connectivity. The UK has long been a leader in this technology. From early pre-email innovations such as encoding crew welfare content within ship telexes, through to the very latest satellite communications. The UK is a market leader, with the biggest names in the business based here.

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*“Understanding, knowledge and experience are vital in ensuring that shipowners have the right solutions when it comes to people, from travel, welfare, resourcing and development too.”*

**Karen Waltham,  
Managing Director  
HR Consulting**



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## Shipbroking

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**Shipbrokers act as agents between those seeking to bring together ships with cargoes, those wanting to arrange the sale and purchase of vessels or providing access to the freight derivatives market. UK shipbrokers continue to dominate the international shipping sector, with significant percentage of global deals transacted by UK-based shipbroking firms.**

Ranging in size from niche sole traders to large publicly listed companies, shipbroking firms employ thousands of staff and provide services across all maritime and shipping sectors. According to research by Maritime London, many international shipping companies and trading houses choose to base their chartering teams in and around London not only because of the advantages of the UK time zone, but also to be at the heart of the international chartering scene.

Most UK shipbroking firms are members of the London based, Baltic Exchange and operate within its framework of strict business ethics encapsulated in its motto, "our word our bond."

The Baltic Exchange provides independent daily shipping indices, fixture lists and forward curve data, used internationally to settle freight derivative and physical contracts and benchmark freight market performance.

UK shipbrokers not only match vessels with cargoes, but also provide crucial market analysis and intelligence as well as risk management services. Additionally, shipbroking is not only about bringing ships and cargoes together. A significant amount of the world's sale & purchase (S&P) brokerage occurs in London. With UK brokers often engaged throughout the entire lifecycle of a vessel, regardless of where it is built, trades or is ultimately recycled.

The UK is also home to the Institute of Chartered Shipbrokers, which provides professional qualifications not only to shipbrokers and ship's agents, but to all sectors of the shipping community worldwide.

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*"Competitive, resourceful and innovative, UK Shipbrokers have the contacts, data, systems and good standing to secure the best deal for clients."*

**David O'Sullivan**  
**Chairman**  
**Institute of Chartered Shipbrokers**  
**London & South East**



<https://www.balticexchange.com>



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[www.mdst.co.uk](http://www.mdst.co.uk)



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[www.offshore-shipbrokers.com](http://www.offshore-shipbrokers.com)



[www.vesselsvalue.com](http://www.vesselsvalue.com)

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## Security and risk management

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**An important and significant strand of maritime consultancy is that of security and risk management. The UK is a pre-eminent supplier of these services to the global maritime industry. Whether it is intelligence on how to best mitigate risks, or even providing personnel onboard, there is a significant number of UK companies offering the highest possible standards.**

Shipping is a business which comes with a degree of risk, while insurance is a common and natural way of transferring some risk, there are often hazards which require different solutions. One major problem for seafarers and shipping has been that of piracy. At various points in various places globally there are spikes in pirate activity. These see vessels attacked, often equipment or cargo stolen, violence and even kidnapping of seafarers, leaving owners to negotiate payment for their release.

UK security providers, often from a military background, provide the advice, guidance and decision-making support to keep vessels clear of such threats. Or where there is no option but to transit high risk or complex environments, then privately contracted security personnel can be placed onboard.

UK maritime security companies have the capability to assist shipping companies with problems such as stowaways, drug smuggling, cargo fraud, and even in keeping crews safe when they are ashore.

There is also a very strong UK business footprint in the investigation of fraud and de-risking commercial ventures through intelligence and analysis. While maritime cyber security is a key focus also. UK companies which have come to the fore to ensure that shipping is aware of the problems, and are equipped to deal with them.

The global standards for maritime security have been driven by the UK companies, and in the Security in Complex Environments Group (SCEG) the work to ensure that standards are maintained, improved and monitored continues.

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*“The UK is a major player in the global private maritime security sector. Clients engaging the services of a British maritime security provider can be readily assured that the company has accredited international standards, appropriate export licenses and expertise in the threat and risk mitigation measures.”*

**Paul Gibson**  
**Director**

**SCEG - Security in Complex Environments Group**



[www.atheniem.com](http://www.atheniem.com)



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# Ship management

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**Ship management is the process of managing a ship and can entail a vast range of different levels of interaction. A ship management company manages ships for a particular owner or a pool of owners, and the contractual relationships can take many different forms.**

Management services benefit an owner, whether to free up their own resources, or to leverage the expertise and buying power of a larger group. Owners use ship managers to help them maximise the returns on their assets.

From full management, through various gradations such as technical, crewing or commercial management. The use of high quality shipmanagers, such as those who are based in the UK, provides the people, expertise, contacts and knowledge to ensure that vessels operate to optimum levels. This can range from ensuring compliance with rules, development of management systems, through to finding the right people to operate them, as well as managing commercial relations.

Technical management is focused on the practical and operational issues surrounding the vessel. Technical managers ensure that ships operate in accordance with the necessary standards, both those laid down by the relevant rules and regulations, but also anything especially requested by the owner. These services may include, dry dock planning and supervision, organisation and oversight of maintenance and repairs, as well managing appropriate certification and even budgets and procurement.

From a commercial management perspective, ship managers will be staffed by a highly qualified team of international in-house brokers with extensive experience in all the market sectors. This means they will be able to ensure their clients have access to the best commercial opportunities.

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*“UK maritime expertise in ship management is recognised world-wide, and provides integrity, and operational excellence to those who want to maximise the efficiency and returns from their vessels”.*

**Douglas Lang**  
**Group Managing Director (Offshore)**  
**Anglo Eastern Offshore**





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## Trade bodies and associations

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**Shipping is a globally regulated industry, with the overarching rules are laid down within the International Maritime Organization (IMO) based in London. This is the United Nations (UN) specialised agency responsible for the safety and security of shipping, and the prevention of marine and atmospheric pollution.**

The IMO currently has 174 Member States and three Associate Members, and these make up the Assembly, with others also supporting the executive function through a Council. The UK is an IMO Council member.

This work is supported by Non-governmental international organizations, groups consultative status and which make a substantial contribution to the work of IMO. These NGOs are able to demonstrate considerable expertise as well as the capacity to contribute, within its field of competence, and must be “truly international” in membership.

Given the location of the IMO, many of these are based in the UK. These key maritime groups produce information, they provide support, exert influence and campaign on matters vital to their constituent memberships and stakeholders. Amongst those based in the UK are The Advisory Committee on Protection of the Sea, The Federation of National Associations of Ship Brokers and Agents, International Association of Classification Societies, International Association of Institutes of Navigation, International Bunker Industry

Association, International Council of Marine Industry Associations, International Chamber of Shipping, International Federation of Shipmasters' Associations, International Harbour Masters' Association, Institute of Marine Engineering, Science and Technology (IMarEST), International Marine Contractors Association, International Maritime Pilots' Association, International Association of Dry Cargo Shipowners (Intercargo), International Association of Independent Tanker Owners (Intertanko), International Salvage Union, International Transport Workers' Federation, ITOPF, The Nautical Institute, The Oil Companies International Marine Forum (OCIMF), The International Group of Protection and Indemnity Associations, The Royal Institution of Naval Architects, and the Society of International Gas Tanker and Terminal Operators (SIGTTO).

There is also an incredibly strong and vibrant use of clusters within key industry locations. Under the umbrella of Maritime UK sit hugely important influential organisations representing the diverse interests of London, Merseyside, The Humber, South West, Solent and Scotland. While the Society of Maritime Industries also provides companies with support, assistance with research and innovation, as we all work to improve the business environment, to facilitate network opportunities while promoting the capabilities within the UK.



[www.maritimeuk.org](http://www.maritimeuk.org)



[www.maritimeindustries.org](http://www.maritimeindustries.org)



[www.maritimelondon.com](http://www.maritimelondon.com)



[www.britishmarine.co.uk](http://www.britishmarine.co.uk)



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[www.southcoastmarine.org.uk](http://www.southcoastmarine.org.uk)

## Training and education

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**Whether seafarer competency onboard ship, training maritime executives ashore, or even further and higher education, the UK has long been a world class destination for the provision of training and education.**

Maritime training courses are provided which build to provide seafarers with certificates of competency, to allow the safe operation, maintenance, and navigation vessels as per the relevant rules and regulations. There are also revalidations and short courses to maintain skills, and to advance specialisations in vessel types or with certain equipment.

UK colleges are known and respected across the industry. In key maritime locations such as Fleetwood, Glasgow, Liverpool, Southampton and South Shields, leading educational establishments have long been training global seafarers.

These provide the basis of officer cadet programmes and build as seafarers gain their Officer of the Watch (OOW), Engineering Officer of the Watch (EOOW) or Electro-Technical certification along with a degree-based qualification, HNC and/or HND.

There are world leading UK companies in the maritime training space, and these have long been innovators at the forefront of new technology. Computer Based Training was introduced to the industry and was a huge success. Now, there is significant investment in areas such as Virtual Reality and performance management of crews.

Career paths and development are vitally important to both maritime professionals and the industry alike, and the UK leads the way in ensuring that qualified mariners can plot a course through to new opportunities, promotions and roles. The Department for Transport has published a “People Route Map” as part of the Maritime2050 strategy.

Seafarers from all over the world come to study in the UK, and they do so to gain their certificates of competency, but many also return to further studies here too. UK Universities offer a vast array of maritime options at degree and post-graduate levels.

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*“The UK has trained generations of seafarers and is world renowned for its very high standards of seafarer training and education. We will continue to ensure our seafarers are equipped with the necessary skills to enable them to secure a long lasting maritime career at sea or on shore”.*

**Kathryn Neilson**  
**Director**  
**Merchant Navy Training Board**



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## Welfare and performance

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**Seafarer welfare is of vital importance, and UK based organisations have led the way in caring for the physical and spiritual needs of those at sea. These organisations assist with access to shore leave, providing contact with home, providing reading materials, and even mental health support.**

Amongst the world's leading welfare organisations are Apostleship of the Sea, Mission to Seafarers and Sailors Society. All of which are UK based. While the Merchant Navy Welfare Board is the umbrella charity for the sector, promoting co-operation between organisations providing for merchant seafarers and their dependants within the UK.

The International Seafarers Welfare Assistance Network (ISWAN) is another UK based organisation which serves to ensure there is alignment of resources in the sector. ISWAN provides a seafarer assistance support line, SeafarerHelp, allowing those at sea access to advice and pastoral care. While the issue of Human Rights at Sea has also been an issue led from the UK.

The welfare of seafarers has taken on a new focus in recent years, and the mental health and wellbeing of those at sea, and their happiness has come to the fore. Much of this work has been driven by organisations in the UK, and so a very proud heritage continues.

The international development of the Human Rights at Sea platform has been led by a UK charitable organisation of the same name which has pioneered the concept and delivered research, education materials and advocacy projects that have helped develop law and policy changes for human rights protections throughout the global maritime sector since 2014.

This focus on the benefits of caring for crew and the positive performance impacts has also lead to the establishment of a number of commercial responses, and there is an increasing number of businesses being established in the UK which are seeking to ensure that the mental and physical wellbeing of crew are seen as a part of a wider picture. They offer services and product which serve to ensure the links between performance of seafarers, of safety, efficiency and operational excellence are recognised, understood and managed effectively.

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*“Caring for seafarers is the right approach, and welfare organisations do so much to improve life at sea. They are a vital part of the maritime community, and their work is vital and appreciated. The UK is the home to many of the maritime world’s leading authorities, and a vital hub for seafarer welfare.”*

**Sandra Welch**  
**Deputy CEO**  
**Sailors’ Society**



[www.humanrightsatsea.org](http://www.humanrightsatsea.org)



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[www.sailors-society.org](http://www.sailors-society.org)



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## Supporting UK maritime services



The Department for International Trade's (DIT) 5-year plan promoting the UK's world class global maritime offer sets out the support to the UK maritime sector as it seeks to capture significant global market share, and how it aligns to the Maritime2050 strategy.

As part of these efforts to support UK business, DIT's maritime team is seeking to connect UK service providers to international buyers. While also developing relationships with the DIT teams internationally, ensuring that demand in key markets can be matched with the appropriate supply.

We are working to communicate the values of UK companies, and assisting them to compete and win business based on quality and service. As reflected in the standing of the sector, the positive reputation for maritime innovation, and as a global leader.

In order to realise the ambitions set out in Maritime2050, there is a focus on maximising the UK strength in maritime professional services, ensuring the UK competitive advantage is retained and enhanced. UK maritime services companies have the skills, knowledge, experience and contacts to deliver, and DIT is working to ensure that we encourage and support exports and can build a pipeline of work into the UK.

The DIT is committed to supporting UK Maritime Service providers and offers the following to companies.

## SUPPORT

**Relationship building:** DIT team liaising with companies to match supply and demand for maritime services internationally.

**Making Introductions:** Seeking to ensure a flow of opportunities from key markets, and to facilitate introductions.

**Awareness Campaigns:** Running guidance webinars and seminars.

**Marketing and Branding:** Producing marketing collateral and capability documents - providing intelligence to markets, and exposure for UK companies which choose to feature.

**GREAT Branding:** Access to marketing assets and collateral.

**Events:** Mapping key maritime events, informing companies of opportunities.

**Financial Support:** Assisting with access to UK Export Finance and de-risking of exports and projects overseas.

## ACCESS

**Market Access:** Support Assistance facilitating market access - responding to queries from companies.

**In country support:** Leveraging DIT network in key maritime markets - access to support, to events and, business matching, introductions and resources.

**Trade Missions:** Opportunities to travel to markets, with enhanced access to opportunities and business introductions.

**Export Champions:** Access to and guidance from existing companies winning business abroad.

**Trade Challenge Partners (TCP):** A link to businesses through unified voices on key issues. A mechanism to engage formally with DIT.

**Tradeshow Access Programme (TAP) Funding:** UK maritime service companies can attend TAP's selected overseas trade shows and conferences and get grants to offset some costs.

## INTELLIGENCE

**New Exporters Workshop:** Guidance and advice on how to make the leap into foreign markets.

**Assistance and Guidance:** MEIF Maritime Export Investment Forums - providing "services surgeries" in key clusters.

**Developing Sector Knowledge (DSK)**

**Events:** Meet DIT staff from key markets, a chance for companies to present and gain positive exposure.

**Thought Leaders and ambassadors:** Hear from business leaders who are securing exports.

**Connecting to investors:** DIT works companies who are seeking investors to match them to opportunities.

**Support and guidance from local**

**International Trade Advisors (ITAs):** While not sector specific, there is a huge wealth of experience in the ITA network. UK companies have a locally based advisor to support export development.

**Market insight:** Intelligence and awareness about key markets and business conditions within them.

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## **DIT**

The Department for International Trade (DIT) helps businesses export, drives inward and outward investment, negotiates market access and trade deals, and champions free trade.

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