



# North American Maritime Opportunities for UK companies



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Department for  
Business & Trade



# Today's Agenda

- Overview of industry in North America
- North American initiatives impacting the maritime industry
- Effect of the Jones Act on international collaboration
- How international companies have entered North American market
- Specific opportunities in North America
- Potential trade shows to attend
- How DBT can help you enter the North American market





# Your speaker



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# About OCO Global

- **OCO Global** is a specialist firm operating within international trade, investment and economics
- Established in 2001, **headquartered in Belfast** with a global presence across Europe, North America, Middle East and Asia
- We provide **strategic consulting** to support to multinational companies expand globally
- We offer holistic **international market expansion** support from initial market assessment, customer analysis and competitor investigation to dedicated market-entry & growth strategies
- **150+** highly skilled full-time **consultants**, with expertise in markets, sectors, the corporate landscape and deep industry networks in the world's major markets
- OCO Global is the North America (U.S. and Canada) **Trade Hub manager for the UK Department for Business & Trade**. We have worked with **over 2,500 UK companies** in their North America market entry activities.

**2,500+**

Supported over 2,500 UK companies with expansion to North America

**£250m+**

Value of export wins that have been achieved since 2017 as a result of OCO support



On-the ground presence with deep knowledge of US market



12 International offices with experienced trade consultants & networks



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# Maritime Industry in North America



*Photo: Mayflower Autonomous Ship arriving from Plymouth, UK in North America [Halifax, Nova Scotia; June 5, 2022]*

# North America Maritime industry valued over \$80,000m

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**\$27,600m**

Ports



**\$2,700m**

Shipbuilding



**\$13,000m**

by 2025

Offshore Wind



**\$6,000m**

Maritime Services



**\$6,700m**

Clean Maritime  
Technologies



**\$14,036m**

Marine Science  
& Engineering



**\$6,255m**

by 2030

Digital Marine /  
Autonomous Technologies



**\$5,695m**

Leisure Marine /  
Cruise Shipping

Ports: This number includes the port infrastructure [market size](#). Does not include Government commitment, which is an additional \$17 bn (US) and C\$180m (of overall infrastructure including ports).

Shipbuilding: Shipbuilding market value accounts for North America total imports of shipbuilding equipment and parts in 2022: \$1.4bn (US), \$1.3bn (CA)

Offshore wind: Investment in Offshore wind in the US is expected to be between \$5.5 – \$14.2 billion by 2025 ([https://supportoffshorewind.org/wp-content/uploads/sites/6/2020/03/AWEA\\_Offshore-Wind-Economic-ImpactsV3.pdf](https://supportoffshorewind.org/wp-content/uploads/sites/6/2020/03/AWEA_Offshore-Wind-Economic-ImpactsV3.pdf))

Maritime services: Includes Professional and technical services (2020) [NOAA](#)

Clean Maritime Technologies: As industry is still very new, difficult to estimate the value of the industry. This number represents the value of US Federal funding towards clean technologies. Specifically, \$3.7 billion from the Infrastructure Law to help accelerate investment and technologies in carbon dioxide removal; and \$3 billion in grants and rebates for port authorities and marine terminals to procure and install zero emission equipment and technology until September 2027.

Marine Science & Engineering: Ocean science and marine technology: \$14bn (Americas) ; Hydrographic survey market: \$35.9m (North America) <https://www.maritimeindustries.org/events/all-events/oceanology-international-americas-2023?occurrenceID=170>

Digital Marine / Autonomous Technologies: Global value of autonomous vessels expected to reach \$8.2bn globally by 2030. Since North America has 23% of shipbuilding industry, \$1,886 million is 23% of global estimated value. Plus the estimated value for Digital marine is \$345bn by 2030, 23% of global estimate is \$79.35bn\*. Adding these numbers together equates to \$81.236bn. North America imports 7.7% of shipping equipment, so potential import value of Digital marine/autonomous technologies is 7.7% of \$81.236bn, which equals \$6.255bn

Leisure Marine / Cruise Shipping: Accounts total US & Canada Leisure Marine imports: CA: \$1.3bn; US: \$2.7bn, and estimated spend by cruises on Ship Maintenance and repair (\$1.53 bn) and Apparel and textiles: (\$165 m)



# The US and UK have a strong trade relationship

- North America is a dynamic market with shifting trends and opportunities – many of which align with the UK's strengths in the maritime industry.
- Both the US and Canada have increased their focus on clean maritime technologies, renewable energy (including offshore wind), and the digitalization of ports and vessels – all creating an abundant number of opportunities for UK companies.

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*£257.7 billion of total trade in goods and services between the UK and North America in the four quarters to the end of Q2 2022*

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*The UK exports £12bn of goods and services within the Maritime Industry*

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*Over 400 marine-related foreign direct investment (FDI) projects from North America, accounting for over \$36.27 billion USD of CapEx, since 2015*

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# Maritime Industry Trends in North America

## Government Initiatives are driving the industry

The US & Canadian Governments are investing in local maritime industry to create jobs & economic growth, however there are gaps that exist.



**Clean Technologies and  
Decarbonization**



**Digital Marine and  
Autonomous  
Technologies**



**Port  
Modernization**



**Offshore  
Wind**



# Government Initiatives

## United States: The Inflation Reduction Act (IRA)

*\$500 billion in new spending and tax breaks that aim to boost clean energy, reduce healthcare costs, and increase tax revenues.*



### Priority of the bill: to boost local US innovation, economic competitiveness, and industrial productivity

- Cements the political commitment of the Biden Administration and various state administrations to **developing offshore wind**.
- **\$100 million** for planning, modeling, and analysis of **interregional electric transmission** generated by offshore wind and **\$760 million** in grants for onshore and offshore **interstate transmission lines**.
- The US offshore wind sector will likely be dependent on foreign suppliers and partners to achieve its ambitious goals, as the US onshore wind sector is highly reliant on foreign suppliers.
- \$3 billion in grants and rebates for port authorities and marine terminals to procure and install zero-emission technology
- Policies under the IRA drive growth of **clean maritime technologies**.

# Government Initiatives

## United States: Port Infrastructure Development Plan (PIDP)

*Discretionary grant program, with \$703m funding available in 2022, that seeks to address US port infrastructure shortcomings*

Aims to modernize US ports, strengthen US supply chains across the long-term, reduce shipping time and costs, and ultimately lower costs of goods for American residents.

- 41 projects awarded funding for ports infrastructure from the program in 2022, many of which included an element of net-zero technology in which UK companies can get involved
- However, PIPD funded projects have a “domestic preference” clause, wherein projects maximizing domestic content (incl services) will be more competitive than those which don't.
- Awards funds, on a competitive basis, to projects that improve the **safety, efficiency, or reliability of the movement of goods.**
- Criteria for awarding funds will also consider how projects address **climate change and sustainability, equity, and workforce development objectives.**
- Recent projects funded include the installation of fast charging stations, port electrification components, modernization of electric and stormwater infrastructure, among other zero-emission conversation projects





# Government Initiatives

## Canada: Port Modernization Review

*Aims to optimize Canadian ports' ability to support inclusive growth and trade, and make Canadian ports sustainable and innovative global logistics leaders*

- Post-review, ports will assume a **greater leadership role in greening the marine sector** by promoting environmentally sustainable infrastructure and acting on climate change.
- Fluidity of traffic flows at ports will be improved to **maximize efficiency** and allow **faster goods handling**.
- Review focused on how ports can best:
  - Support the competitiveness of Canada's economy by facilitating the movement of goods
  - Strengthen relationships with Indigenous peoples and local communities
  - Promote environmentally sustainable infrastructure and operations
  - Enhance port safety and security
  - Optimize governance and financial management



# Government Initiatives

## Canada: National Shipbuilding Strategy

*Long-term project to renew Canada's federal fleet of combat and non-combat vessels and develop a sustainable, long-term shipbuilding plan*

- Government has partnered with three shipyards to restore shipyards, rebuild marine industry, and create sustainable jobs in Canada
- Although focus is on investing in local Canadian marine industry, there are supply chain gaps that can be filled.
  - Areas of opportunity include propulsion tech, low-emission ferries and zero-emission tech, and engines.
- As National Strategy is to develop the industry in Canada and create a sustainable local supply chain, international companies can face **potential challenges**.
  - To work around this, UK companies can create **strategic relationships with OEMs** in Canada, or **partnerships** with tier-1 and tier-2 Canadian players.

### Shipbuilder Partners



**DAVIE**



Irving Shipbuilding, Inc.



# How to Navigate the North American Market

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# The Jones Act and How to Navigate It

The Jones Act (1920) mandates that vessels moving domestic cargo from one US port to another must be:

- ① **Constructed in the US**
- ② **Manned by US citizens**

## Impact

- Shipbuilding industry in the US is **almost entirely inward oriented**.
- Of the \$32 billion USD revenue that the industry generated in 2022, **only 3.2% was exported**.
- There is little export as industry is not able to compete with other shipbuilding nation shipyards, notably in East Asia, and because the local demand is so high.
- Vessels must be constructed in the US, however the importation of equipment, kits, design, etc. still possible.



## How to Navigate

- American newbuilds can be **comprised of substantial amounts of foreign produced components**.
- Provided that steel hull and vessel assembly are carried out in an American shipyard by a US firm, practically everything on a newbuild can be manufactured and designed overseas.
- UK companies can provide kits to then be constructed in the US.
- UK companies can partner with North American counterparts through joint ventures or consortiums.



# Case Studies

## Case Study 1



### Libra Group:

- A subsidiary of UK-founded multinational conglomerate Libra Group **acquired St Johns Ship Building**, a US shipyard that is capable of building Jones Act compliant offshore wind vessels.
- Constructing offshore wind servicing vessels at “a time of significant need for Jones Act-compliant vessels” was explicitly stated to be one intention of this acquisition.

## Case Study 2



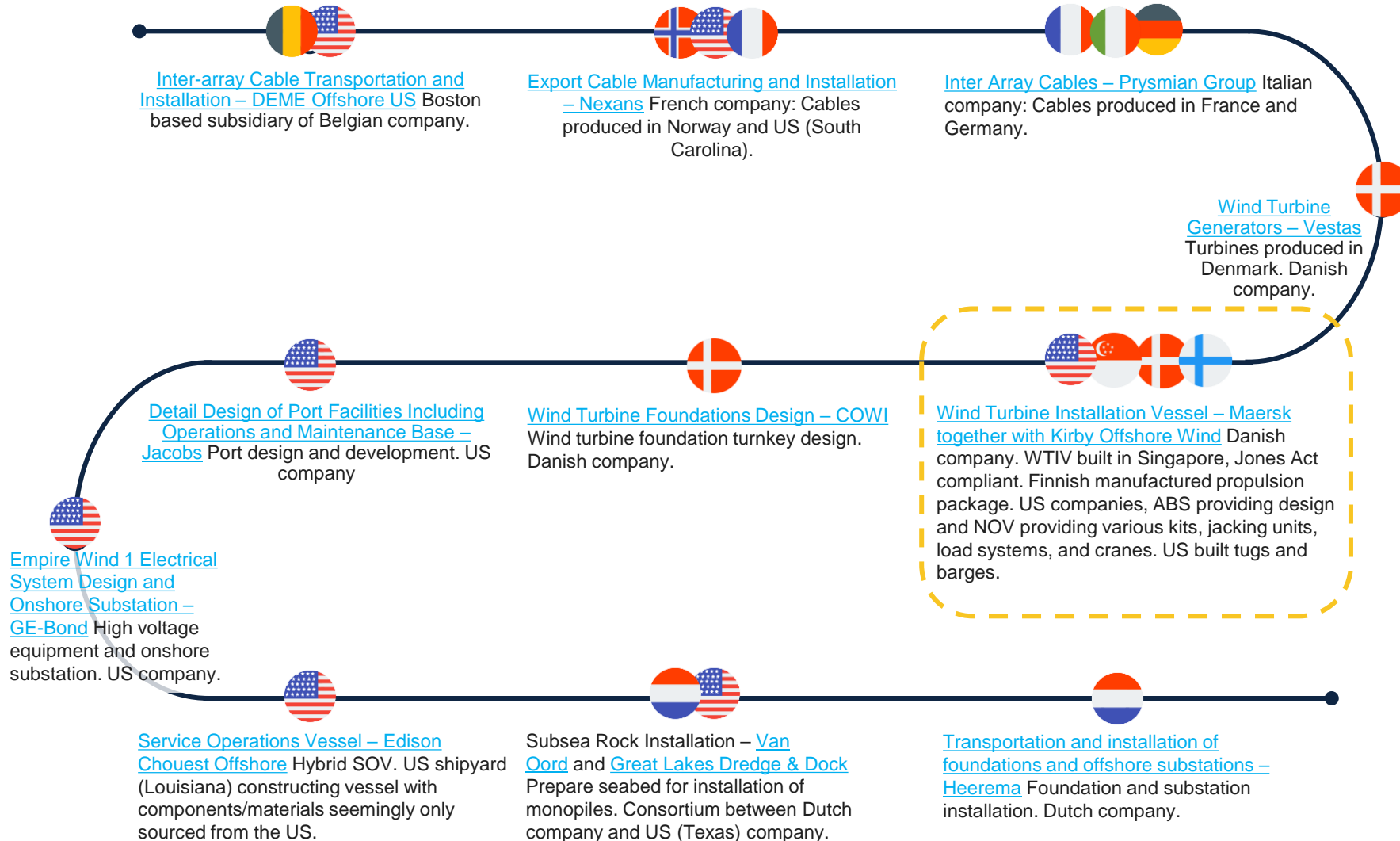
### Chartwell Marine & Seacat Services:

- Atlantic Wind Transfers created a strategic partnership with UK-based Seacat Services to advance the CTV market based in the US. UK-based vessel design company Chartwell Marine continued its partnership with AWT to design six Crew Transfer Vessels (CTVs).
- Chartwell’s designs will be **constructed by St. John’s Ship Building** to ensure Jones Act Compliance.
- Through Atlantic Wind Transfers’ partnership with two leading UK firms, the company is providing fleet to support growth, service and lower emissions for the US offshore wind market

# Players in America's Offshore Wind Industry

## Empire Wind Contractors

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**Empire Wind Contractors** is a 50-50 Partnership with Equinor (hq-NO) & BP (hq-UK) to build offshore wind farms off the coast of New York, producing 2.1 GW of renewable energy.

Non-US countries involved either directly or through subsidiaries: Belgium, France, Germany, Italy, Denmark, Norway, Finland, Singapore, Netherlands.



# Maersk's foreign-built Jones Act-compliant WIV

The Wind Installation Vessel (WIV) stays at location, while only **barges and tugs** transit to and from port to site transporting components.

Since the WIV never goes to port, it will be Jones Act-compliant although it is being constructed in Singapore.

By having the WIV stationed on site, it will carry out installations 30% more efficiently according to Maersk.



# How a Danish and US Joint Venture leads to global collaboration for US Offshore Wind Farm





# Opportunities for UK Companies

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# Top opportunities for UK firms in North America



**Zero-emission equipment in demand** – as shipbuilders in North America are expected the lower emissions, they will seek out expertise in Fuel Switching/efficiency technologies, Clean Marine Propulsion, Zero Emission Technologies / fast ferries.



**Consultative Services for Offshore Wind** – North America is far behind Europe in offshore wind development. UK companies that have capability in managing and operating offshore wind will be highly valuable as projects are constructed.



**Seek out partnerships with local North American firms** – much of the funding and investment of the maritime industry have a preference clause for local firms. UK companies can enter strategic partnerships with US & Canadian companies.



**Focus on supplying design and kits** – the supply of design and kits to shipbuilders is a way to navigate the Jones Act.



**Leisure Marine prominent market since COVID** - US shipyards are struggling to meet demand for recreational yachts, yet 95% of leisure boats in the US are US-made. UK bespoke yacht makers can tap into the larger, luxury yacht market demand not being met by US shipbuilders, worth an estimated \$2.5bn



# North American Tradeshows to Attend

Tradeshow	Description	Location	Date	Website
<b>SNAME Maritime Convention</b>	<ul style="list-style-type: none"> <li>Brings together the international community of maritime professionals for professional growth, learning, and networking.</li> <li>Features 80 exhibitors and focuses on industry solutions for all fields of interest including academic, design, build, operate, maintain, salvage and eventual decommission.</li> </ul>	San Diego, California, US	September 27-29, 2023	<a href="https://www.sname.org/conferences-and-events">https://www.sname.org/conferences-and-events</a>
<b>IBEX</b>	<ul style="list-style-type: none"> <li>North America's largest technical trade event for marine industry professionals.</li> <li>Unique forum where the marine industry can do business, share ideas, and accelerate new product development.</li> </ul>	Tampa, Florida, US	October 3-5, 2023	<a href="https://www.ibexshow.com/ibex365/">https://www.ibexshow.com/ibex365/</a>
<b>Fort Lauderdale International Boat Show</b>	<ul style="list-style-type: none"> <li>Show features more than \$3B worth of boats, yachts, superyachts, electronics, and engines.</li> <li>Also features thousands of accessories from every major marine manufacturer and builder worldwide.</li> </ul>	Fort Lauderdale, Florida, US	October 25-29, 2023	<a href="https://www.flibs.com/en/home.html">https://www.flibs.com/en/home.html</a>
<b>Pacific Marine Expo</b>	<ul style="list-style-type: none"> <li>Largest and longest running commercial fishing and commercial marine tradeshow on the West Coast.</li> <li>Serves all aspects of the Pacific market, including commercial vessel owners, commercial fishermen, boat builders, workboat operators and seafood processors, tug, tow and marine patrol, and crew.</li> </ul>	Seattle, Washington, US	Fall 2023	<a href="https://www.pacificmarineexpo.com">https://www.pacificmarineexpo.com</a>

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# Current Projects in North America







# California Offshore Wind Port and Infrastructure Upgrading

*Port upgrading and improvement of onshore infrastructure in Humboldt Bay and Morro Bay ports following the December 2022 lease round in California. \$10.5M grant from California Energy Commission for Port of Humboldt Bay renovations.*

<u>Areas of Opportunity</u>	<u>Barriers to Opportunity:</u>	<u>Additional Resources</u>
<ul style="list-style-type: none"><li>• Ports need to be expanded and upgraded in Humboldt and Morro Bay.</li><li>• Power grid in catch area NW California needs significant investment and improvement.</li><li>• Research on threats to marine wildlife and environmental assessments needed.</li></ul>	<ul style="list-style-type: none"><li>• Excess capacity unsure. Short turnaround.</li><li>• Established presence and relationships with local actors may make it difficult for new entrants.</li><li>• Domestic port developers may be preferred.</li></ul>	<ul style="list-style-type: none"><li>• Survey the California Energy Commissions tender portal for opportunities: <a href="https://www.energy.ca.gov/funding-opportunities/solicitations">https://www.energy.ca.gov/funding-opportunities/solicitations</a></li></ul>

**Project:**  
California Offshore Wind Port and Infrastructure Upgrading

**Location:**  
California, US

**Project Status:**  
Lease areas awarded December 2022



# \$1.8 Billion Louisiana Port Expansion Project

*Public-private partnership with Port of New Orleans, Ports America (New Jersey, US) and Mediterranean Shipping Company (Geneva, CH) \$800m investment committed by Ports America and MSC’s subsidiary Terminal Investment Limited. Port NOLA, state and federal funding remaining \$1bn. The \$1.8 bn state-of-the-art container facility on the Lower Mississippi River will be able to serve vessels of all sizes.*

<u>Areas of Opportunity</u>	<u>Barriers to Opportunity:</u>	<u>Additional Resources</u>
<ul style="list-style-type: none"><li>• Port construction.</li><li>• Dredging (design, engineering, management).</li><li>• Port software.</li><li>• Future opportunities in port management, operations, increased trade.</li><li>• Potential synergies with upcoming Gulf of Mexico offshore wind projects.</li></ul>	<ul style="list-style-type: none"><li>• US competition laws restrict foreign built, chartered or operated vessels from operating in dredging industry.</li></ul>	<ul style="list-style-type: none"><li>• Register as vendors in Port NOLA’s procurement portal (<a href="https://portnola.com/business/procurement">https://portnola.com/business/procurement</a>) in anticipation of tenders to be announced soon. Construction to begin in 2025.</li></ul>

**Project:**  
Louisiana Port  
Expansion

**Location:**  
Louisiana, US

**Project Status:**  
Announced December 2022. Project is currently in the design and permitting phase of the U.S. Army Corps of Engineers’ environmental review process. Construction slated to begin in 2025, first berth to open in 2028





## Port of Montreal Contrecœur expansion

*With the support of Canada Infrastructure Bank and the Government of Quebec, the Port of Montreal and its partners plan to develop a new state-of-the-art container terminal able to handle up to 1.15 million containers (TEUs). Estimated total CAPEX of CAD \$950 million.*

<u>Areas of Opportunity</u>	<u>Barriers to Opportunity:</u>	<u>Additional Resources</u>
<ul style="list-style-type: none"><li>• Port infrastructure.</li><li>• Port software.</li><li>• Dredging.</li><li>• Construction.</li><li>• Future opportunities from project.</li></ul>	<ul style="list-style-type: none"><li>• 3/5 bids that have been qualified, however, it is uncertain if these bidders already have subcontractors.</li></ul>	<ul style="list-style-type: none"><li>• Bids and RFPs can be found on Montreal Port Authority Bid Opportunities: <a href="https://www.merx.com/apm">https://www.merx.com/apm</a></li></ul>

**Project:**  
Port of Montreal  
Contrecœur Expansion

**Location:**  
Quebec, Canada

**Project Status:**  
3/5 bids received  
qualified for next phase  
of tender evaluation:  
Axiom Infrastructure  
Canada and Pomerleau  
Capital (CA); Ports  
America Holdings (US);  
Terminal Investment  
Limited (CH)



## Canada’s Ocean Supercluster

Canada’s Ocean Supercluster is an industry-led transformative cluster model driving cross-sectoral collaboration and aiming to accelerate innovation in Canada’s ocean economy. In the last two years, the supercluster has announced the C\$65M Clean Ocean Advanced Biofuels, and the C\$11 Unmanned Digital Twinning projects. Both projects involve a range of Canadian companies collaborating on respectively producing renewable diesel, and improving digital twinning of underwater infrastructures.

<u>Areas of Opportunity</u>	<u>Barriers to Opportunity:</u>	<u>Additional Resources</u>
<ul style="list-style-type: none"><li>• Great foot in the door in the Canadian maritime industry.</li><li>• Steady stream of events that could be useful for establishing presence in NA or developing a network.</li><li>• New projects and opportunities to collaborate or bid for tenders in innovative maritime sectors.</li></ul>	<ul style="list-style-type: none"><li>• Government funding towards the supercluster projects may be more Canadian-company focused to develop the cluster nationally.</li></ul>	<ul style="list-style-type: none"><li>• Additional information can be found at: <a href="https://oceansupercluster.ca/members/info/">https://oceansupercluster.ca/members/info/</a></li></ul>

**Project:**  
Canada’s Ocean  
Supercluster

**Location:**  
Canada

**Project Status:**  
Ongoing



## US Ferries Modernization



*As part of the Infrastructure Law, the US Department of Transportation's Federal Transit Administration (FTA) announced \$384 million in funding to expand nation's ferry services and acceleration transition to zero emission transportation.*



<u>Areas of Opportunity</u>	<u>Barriers to Opportunity:</u>	<u>Additional Resources</u>
<ul style="list-style-type: none"><li>• Propulsion technology.</li><li>• Low-emission ferries and zero-emission technology.</li><li>• Charging stations.</li><li>• Alternative fuel technology for ferries.</li><li>• Construction/operations to modernize terminals, facilities, and equipment.</li></ul>	<ul style="list-style-type: none"><li>• Federal grants often prefer contracting US-based companies.</li><li>• Each state department of transit operates individually with their own goals and standards, so companies would need to build multiple relationships at the state-level.</li><li>• Potential competition from local NA market: Cummins supplying hydrogen fuel cells to SWITCH Maritime for America's first fleet of zero emission</li></ul>	<ul style="list-style-type: none"><li>• Full list of awarded grants: <a href="https://www.transit.dot.gov/funding/grants/grant-programs/fta-ferry-grant-program-2022-selected-projects">https://www.transit.dot.gov/funding/grants/grant-programs/fta-ferry-grant-program-2022-selected-projects</a></li><li>• FTA's Ferry Service for Rural Communities Program: <a href="https://www.transit.dot.gov/funding/grants/grant-programs/ferry-service-rural-communities-program-iiija-ss-71103">https://www.transit.dot.gov/funding/grants/grant-programs/ferry-service-rural-communities-program-iiija-ss-71103</a></li><li>• FTA's Electric or Low-Emitting Ferry Pilot Program: <a href="https://www.transit.dot.gov/funding/grants/grant-programs/electric-or-low-emitting-ferry-pilot-program-iiija-ss-71102">https://www.transit.dot.gov/funding/grants/grant-programs/electric-or-low-emitting-ferry-pilot-program-iiija-ss-71102</a></li><li>• FTA's Passenger Ferry Grant Program: <a href="https://www.transit.dot.gov/funding/grants/grant-programs/passenger-ferry-grant-program-section-5307h">https://www.transit.dot.gov/funding/grants/grant-programs/passenger-ferry-grant-program-section-5307h</a></li></ul>

**Project:**  
US Ferries  
Modernization

**Location:**  
United States

**Project Status:**  
FTA is awarding 23 grants across 11 states, which will boost ferry services in rural areas, modernize urban ferry systems, and lower emissions by adoption of zero-emission technology





# St. Lawrence Seaway Green Shipping Corridor Network Initiative

The US Department of Transportation, the US Department of State, and Transport Canada will host consultations with ports and other stakeholders, with the goal of facilitating the establishment of a Great Lakes Green Shipping Corridor Network. Green Shipping Corridors accelerate the adoption of zero-emission fuels and technologies. Through this initiative, Canada and the United States will work with industry to help facilitate the establishment of green corridors throughout the region – containing more than 110 ports; this will include convening stakeholders and contributing to assessments and analyses relating to alternative fuels and power options within the system.

<u>Areas of Opportunity</u>	<u>Barriers to Opportunity:</u>	<u>Additional Resources</u>
<ul style="list-style-type: none"><li>• Low- and zero-emission technology.</li><li>• Port infrastructure – particularly pertaining to alternative fuels, charging stations, etc.</li><li>• Upgrading vessels to meet low-emission expectations within corridor.</li><li>• Alternative fuels.</li><li>• Fleet renewal for fuel-efficient engine technology.</li><li>• Coastal intelligence data collection.</li></ul>	<ul style="list-style-type: none"><li>• Initiative was announced at COP27, however, since then has not seen a lot of drive.</li><li>• John M. Peach, executive director of the Clayton-based nonprofit environmental advocacy group Save the River stated, “It’s a grand initiative if they follow up with it.”</li></ul>	<ul style="list-style-type: none"><li>• Related opportunity: Port of Montreal designated over CAD \$335m to five-year infrastructure investment plan: <a href="https://www.newswire.ca/news-releases/the-port-of-montreal-wants-to-invest-in-the-future-of-montreal-s-port-infrastructure-828859931.html">https://www.newswire.ca/news-releases/the-port-of-montreal-wants-to-invest-in-the-future-of-montreal-s-port-infrastructure-828859931.html</a></li></ul>

**Project:**  
St. Lawrence Seaway  
Green Shipping Corridor  
Network Initiative

**Location:**  
Great Lakes, United  
States and Canada

**Project Status:**  
Announced in November  
2022

# Next Steps





# How the Department for Business & Trade can help Export Support Service (ESS)



Department for  
Business & Trade



# Overview of the ESS Offer



**One-to-One Conversations** – Eligible UK companies can receive 1:1 calls with OCO trade advisors. These calls range between 30-60 mins in trade advisors understand your support requirement and stage of exporting, in order to determine next steps and provide the most relevant information.



**OTS library of resources** – Off-the-shelf (OTS) guidance can help you gain a better understanding of specific topics. OTS library includes one-pagers (taxes, customs, immigration), market sector guides, regulatory guidance (FDA, Liability, etc.)

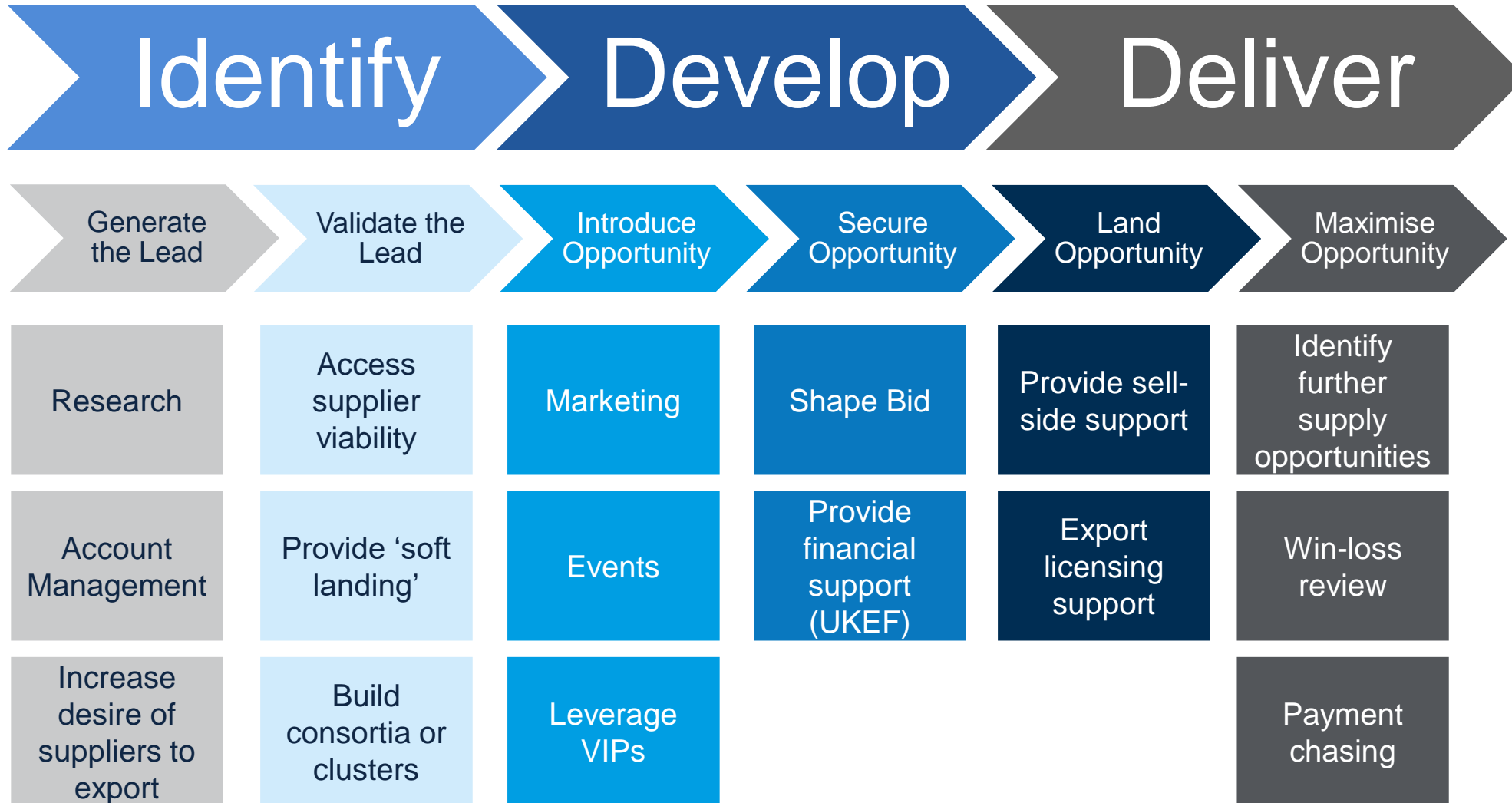


**Market Insight Reports** – Trade advisors can provide bespoke market insight reports that are tailored to each your requirement of support. The reports are a brief, initial and complimentary high-level research exercise to help companies conduct early business development and market analysis.



**Overseas Referral Network (ORN)** – Eligible UK companies can access a network of providers. The North America Referral Network is a selection of DBT-approved private sector companies that provide subject matter expertise for fee-based projects. Included among the network are accountants, lawyers, consultants, sector specialists, etc.

# Export Support from DBT



Contact [maritime@trade.gov.uk](mailto:maritime@trade.gov.uk) to learn more





**Thank you!**

**Any questions?**

Connect with us!

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