



MARE
MARINE EXPERTS

MARCO CALABRIA

**CHALLENGES OF
GLOBALIZED SHIPPING FOR
MARINE EXPERTS**

MARE Srl – MARINE EXPERTS, a Marine Survey and Consultancy firm set up by Naval Architect and Marine Engineer Marco CALABRIA in Monaco, is the head of MARE NETWORK, a Group of networked boutique marine survey and consultancy firms acting under an agreement to provide services in marine claims to global clients such as insurance companies, ship owners and financial entities worldwide.

The locations served by the Network are Monaco, where the Network is coordinated and where exclusive surveyors are based for missions and for handling claims and reports, Italy, where a large staff of exclusive surveyors is available for inspections, handling claims and reports, forensic and accident investigations, and Hong Kong and Shanghai, Singapore, Miami, Montevideo and Dubai, where local surveyors carry out onsite activities under the coordination and supervision of the European headquarters.

+120 major claims per year

Single interface
for overseas claims

+200 years +3.000 claims
combined experience

Integrated specialties

Global coverage
with local knowledge

MARE NETWORK

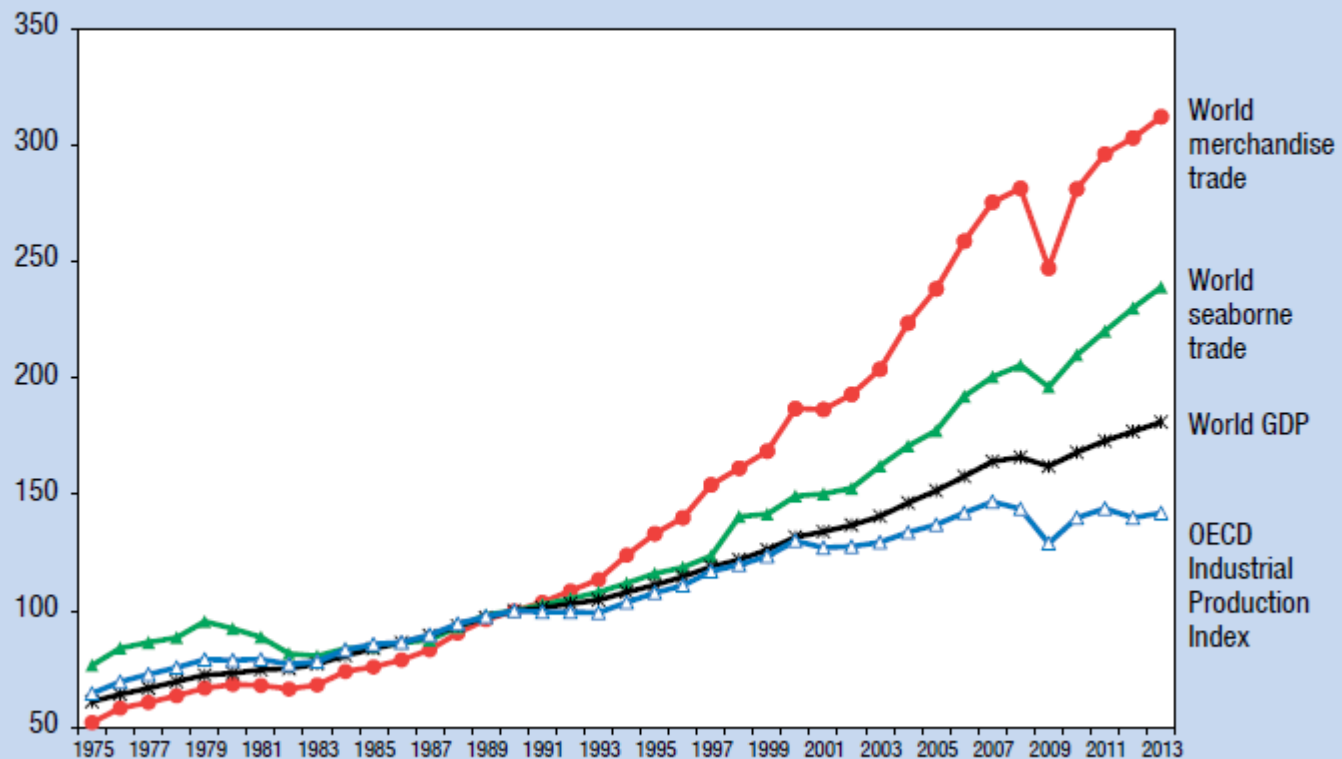


WHAT IS GLOBALIZATION?

GLOBALIZATION IS A PROCESS OF INTERACTION AND INTEGRATION AMONG THE PEOPLE, COMPANIES AND GOVERNMENTS OF DIFFERENT NATIONS, A PROCESS DRIVEN BY INTERNATIONAL TRADE AND INVESTMENT AND AIDED BY INFORMATION TECHNOLOGY

IS SHIPPING AFFECTED?

Figure 1.1. The OECD Industrial Production Index and indices for the world: Gross domestic product, merchandise trade and seaborne shipments, 1975–2013 (1990 = 100)



WHAT CONSEQUENCES FOR MARINE SURVEYORS?

- GLOBAL MARKETS
- GLOBAL WORKPLACES
- NEW TECHNOLOGIES

FROM ONE MARKET TO MANY MARKETS

- NOT ONLY LONDON
- BUSINESS AND SERVICES HAVE
SPREAD AND MOVED EAST
- FRAGMENTED, DIVERSE MARKETS
WITH OWN REQUIREMENTS

COMPETITIVE PRESSURE ON SMALLER SERVICE PROVIDERS

- SAME SERVICE STANDARD FOR MANY CLIENTS, LOCATIONS, JURISDICTIONS, CLAUSES, ETC.
- DEAL WITH MANY AND NEW PARTIES
- GLOBAL CLIENTS HAVE BIG EXPECTATIONS AND COMPLEX NEEDS

LIMITS OF LARGE ORGANIZATIONS

- LOCAL KNOWLEDGE (I.E. COSTS, RULES) IS WEAK
- LESS ADAPTABLE TO CLIENT NEEDS
- SKILLS AND TALENT CAN BE DILUTED AND HARD TO RETAIN
- SYSTEM COSTS INCREASE

DOES IT MATTER?
AREN'T SHIPS JUST SHIPS?
DEVIL IS IN THE DETAILS!

SURVEYORS MUST KNOW OF POLICIES AND CLAUSES

SURVEYORS HAVE TO COLLECT IN
ADVANCE EVIDENCE AND INFORMATION
WHICH MIGHT BE USEFUL LATER FOR
ADJUSTING THE CLAIM, OR TO RECOVER
FROM A THIRD PARTY, OR FOR A
DISPUTE

SURVEYORS MUST KNOW OF POLICIES AND CLAUSES

- THE TIME OF LOSS IN CASE OF LATENT DEFECT IS DIFFERENT IN ENGLISH CLAUSES AND NORDIC PLAN
- INSURED RISKS AND EXCLUSIONS ARE DIFFERENT AND REQUIRE DIFFERENT INVESTIGATIONS

SURVEYORS NEED TO BE HANDS ON

- COST OF REPAIRS DEPEND HEAVILY ON LOCATION (STEEL RENEWAL IN CHINA IS ABOUT 1\$/KG AND IN ARGENTINA ABOUT 50\$/KG)
- INSIDER INFORMATION IS SOMETIMES AVAILABLE ONLY TO LOCALS

JUST THE SAME OLD SHIPS?

Ships continue to get larger

EVOLUTION OF CONTAINERSHIP SIZE

CONVERTED CARGO VESSEL • <800TEU



CELLULAR CONTAINERSHIP • 1,000-2,500TEU



PANAMAX • 3,000-4,000TEU



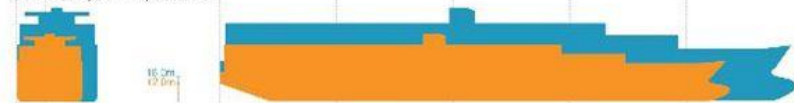
POST-PANAMAX • 4,000-5,000TEU



POST-PANAMAX PLUS • 5,000-8,000TEU



ULCS • 11,000-14,500TEU



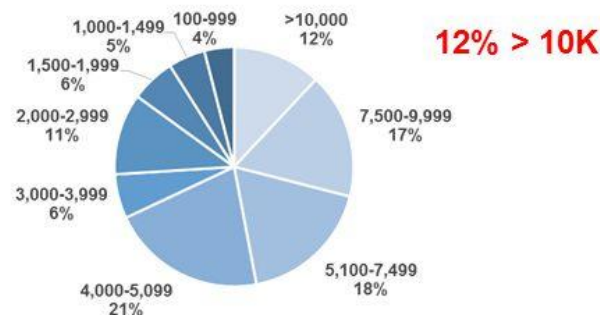
TRIPLE-E • 18,000TEU



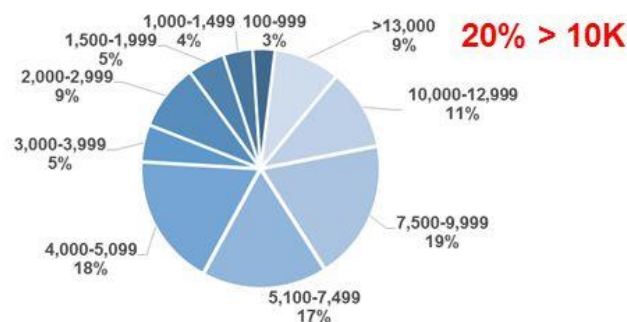
Source: Alphaliner, Moffatt & Nichol

FLEET CAPACITY BREAKDOWN BY TEU SIZE RANGE

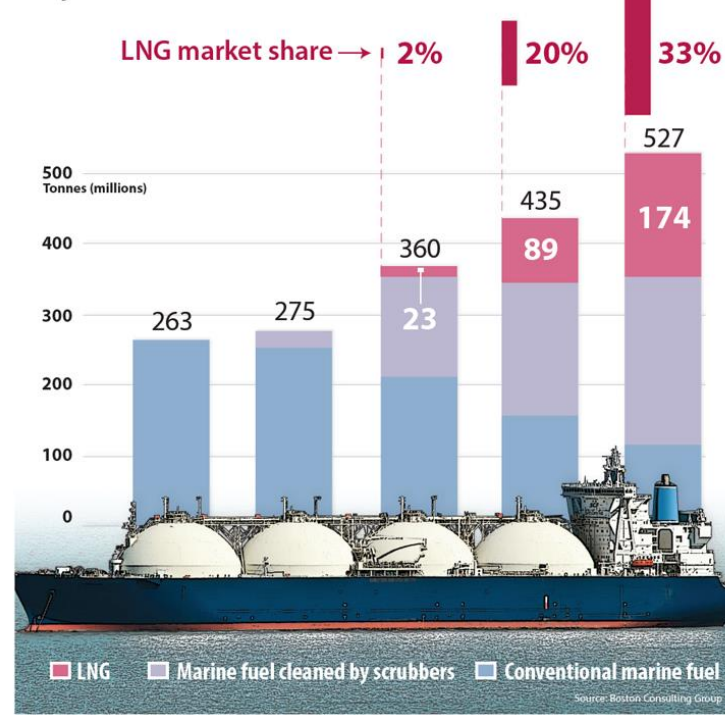
As of November 1, 2012



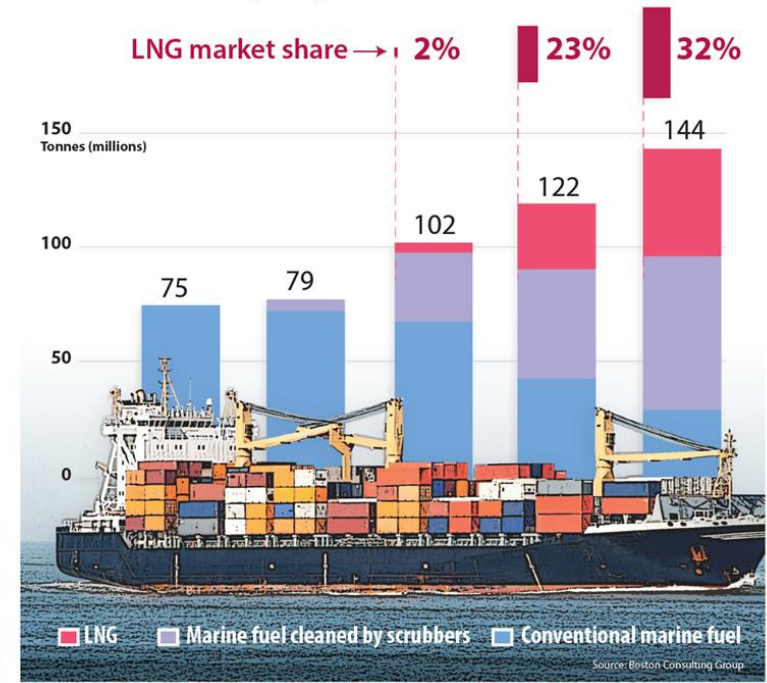
As of April 1, 2015



Projected marine fuel demand

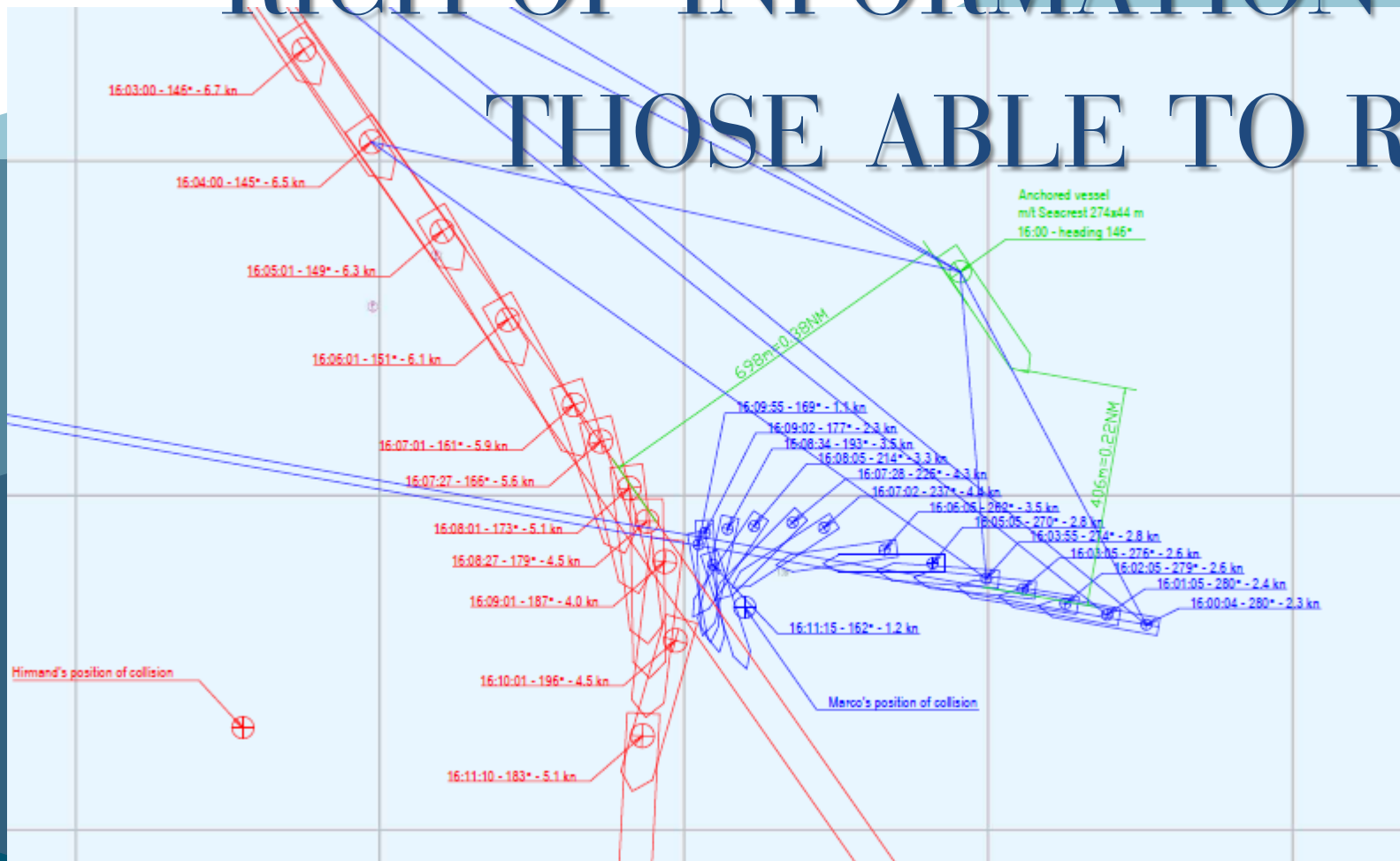


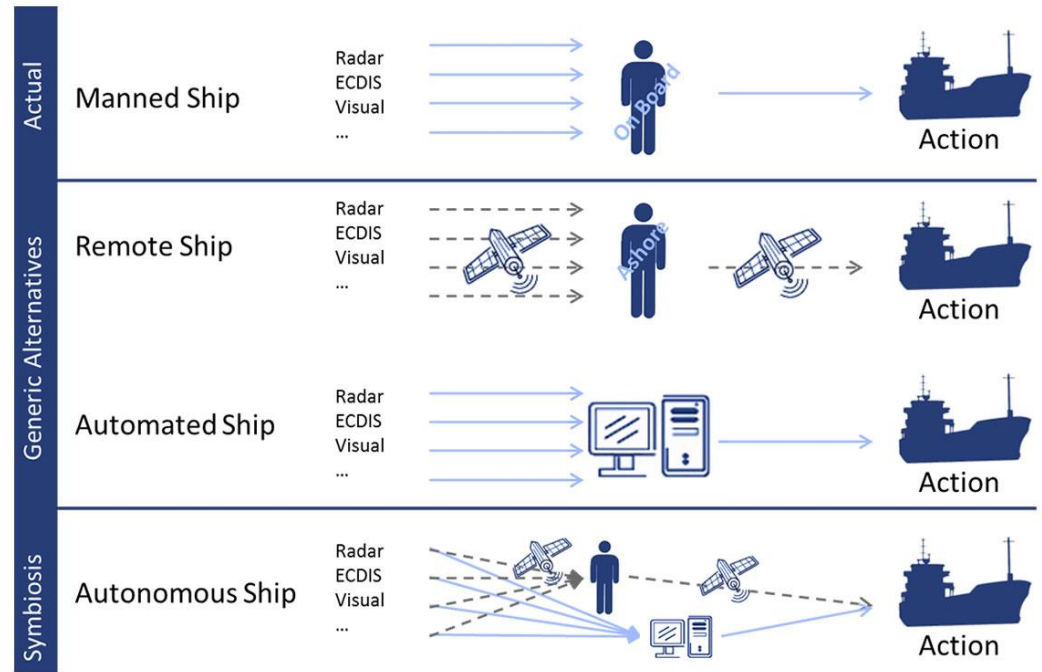
Projected marine fuel demand for container ship segment



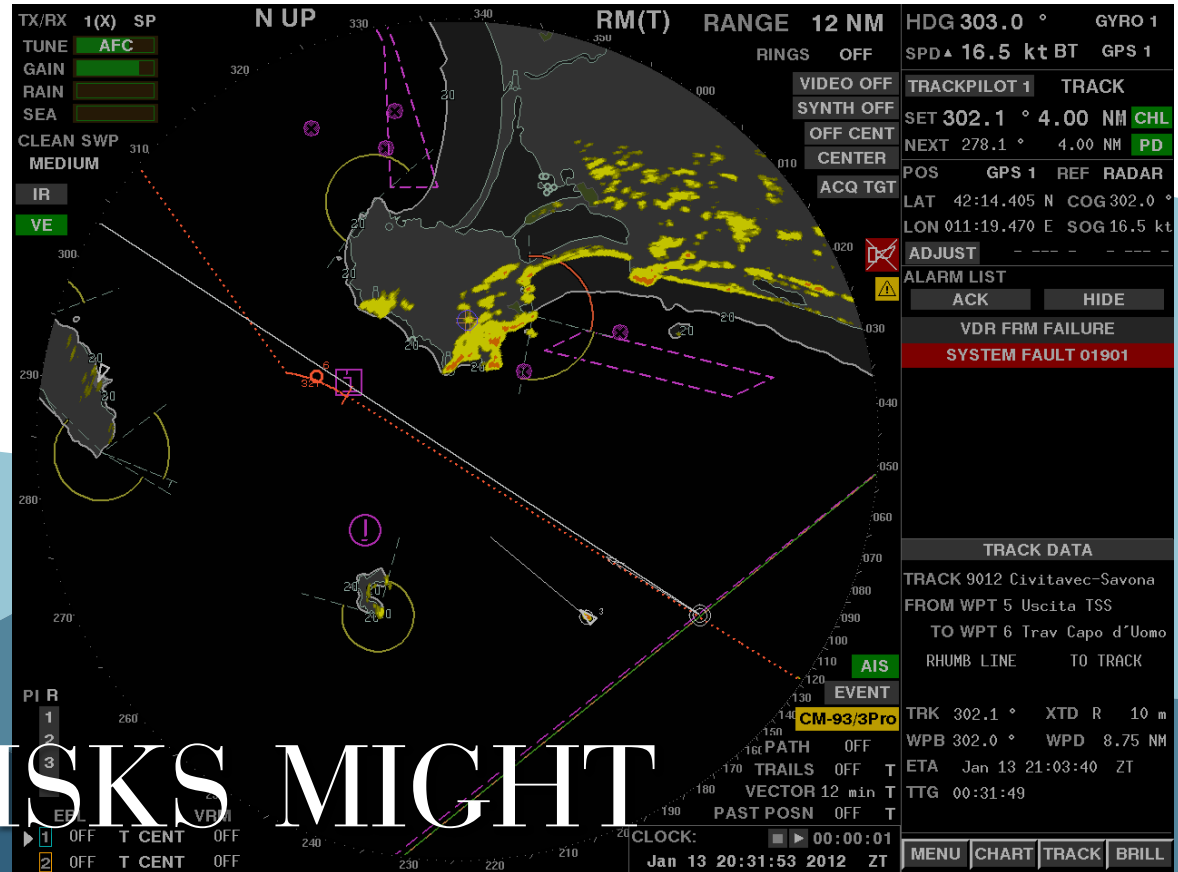
**GAS AS A FUEL AND OTHER
ECO SYSTEMS = NEW RISKS
AND TECHNOLOGIES**

IT SYSTEMS ONBOARD ARE RICH OF INFORMATION FOR THOSE ABLE TO READ





REMOTE AND AUTOMATED SHIPS ARE BEING DESIGNED, ARE WE READY?

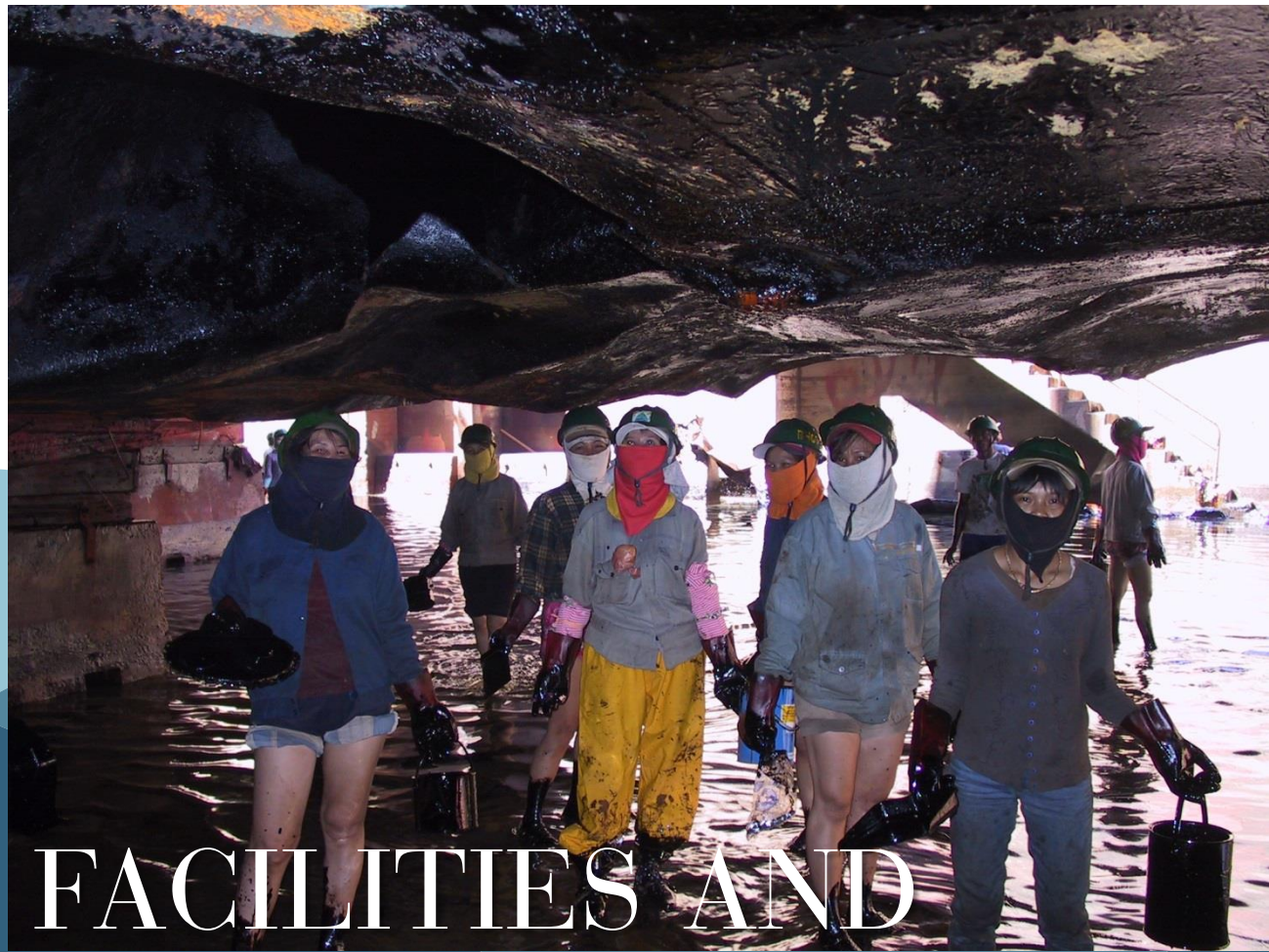


CYBER RISKS MIGHT
BECOME SIGNIFICANT AND
REQUIRE SPECIAL SKILLS



DRONES AND UW-ROVs CAN PROVIDE A NEW PERSPECTIVE





REPAIR FACILITIES AND SERVICES STRUGGLE TO FOLLOW PROGRESS

JUST SURVEYORS?

NO, MARINE CLAIMS
EXPERTS



MARE
MARINE EXPERTS

AN EXPERT EYE ON
YOUR MARINE
CLAIMS WORLDWIDE