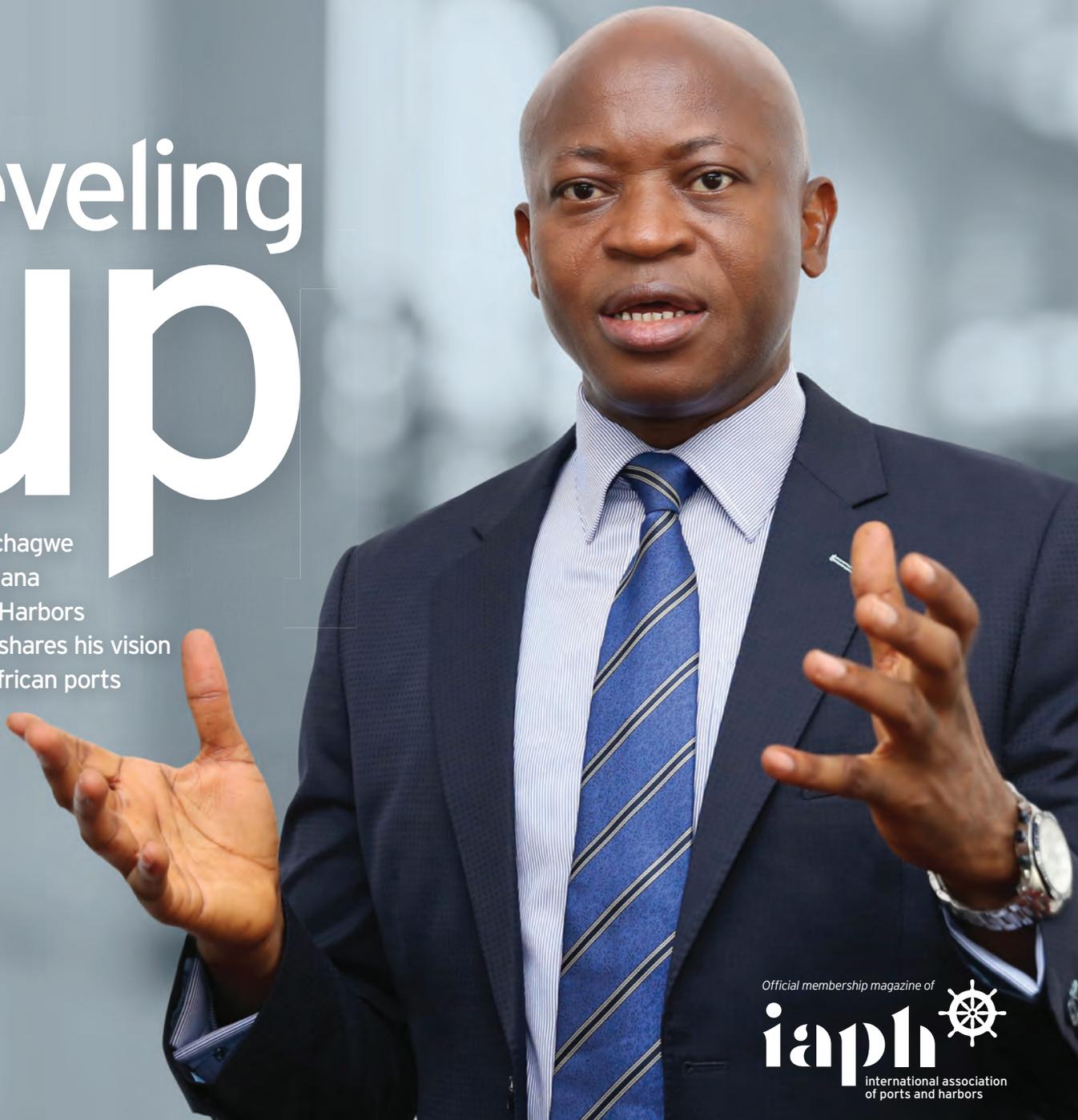


Providing thought leadership on the role of ports in a connected world

Leveling up

Michael Achagwe
Luguje, Ghana
Ports and Harbors
Authority, shares his vision
for west African ports



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Evading authorities

Drug smuggling routes raise port concern

Incapacitating action

The Russia-Ukraine war threatens ports

Navigating depletion

Summer drought paralyzes river trade



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CONTENTS

EDITOR'S COMMENT & CONTRIBUTORS | 02
Invisible issues will resurface eventually

PERSPECTIVE ENERGY SUPPLY | 08
ESPO discusses the role of ports in fueling the future

THE DEBATE | THE POLL | 14
Shortsea shipping to relieve congestion

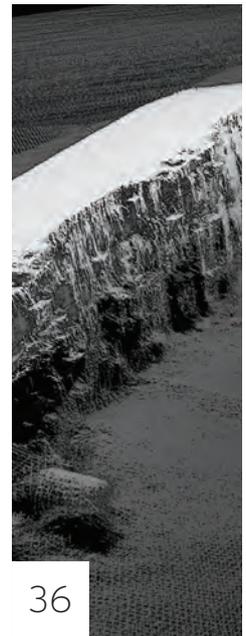
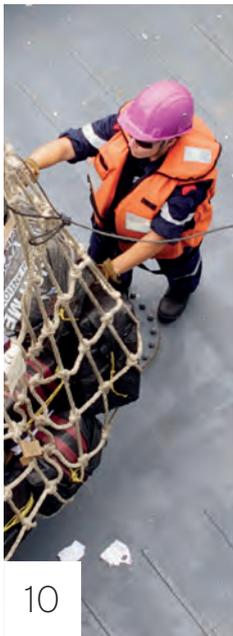
WORLD PORTS TRACKER Q2 UPDATE | 18
S&P Global data mixed with the first IAPH tracker results

04 | IN CONVERSATION WITH MICHAEL LUGUJE
Ghana Ports chief on western Africa's growth potential

10 | FEATURE ILLICIT TRADE
Drug smuggle through container ports on the rise

16 | INTERVIEW MOHAMMAD MUSA
Positioning Mongla port as Bangladesh's new hub

22 | THE COLUMN SANJAM GUPTA
What is in store for Bangladesh's ports?



PROJECT FOCUS RUSSIA-UKRAINE WAR | 24
The impact of the conflict on ports in both countries

PERSPECTIVE SANCTIONS | 30
Not only technical support needed to control sanctions

IN COURT DESIGNATION | 34
A marina is a dock that can limit its liability

IAPH INFO | 38
News from your association

28 | LOOKOUT DROUGHT IN EUROPE
Low water levels hamper river trade

33 | QUICK 10 FRANC PIGNA
The port consultant on some of his favorite things

36 | CREATIVE SIDE UNPATH'D WATERS
A research project improves data on shipwrecks

40 | THE REVIEW DEAD IN THE WATER
A maritime insurance fraud turned deadly

PORTS & HARBORS

Published bi-monthly by the International Association of Ports and Harbors (IAPH), produced, edited, and printed by S&P Global Market Intelligence. ISSN: 0554-7555

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EDITOR'S COMMENT



INES NASTALI

Editor

Waiting for the big bang

Archaeology shows us the way humans have lived in the past; how we deal with what it uncovers, however, tells us a lot about the path we are on right now.

When, at the end of August, the water levels of the Danube – just like those of other European rivers – dropped to new lows due to the continent's ongoing drought, old German war ships emerged near the Serbian port town of Prahovo.

Left behind by the retreating Germans in 1944, when the Soviet army closed in from the east, it is rare that they get uncovered, which speaks to the extremity of the current drought.

They have long posed a hazard to the safe navigation of the river by narrowing the trade lane, especially during these low-levels events.

In 2018, a master plan and feasibility study for the Serbian Inland Waterway Transports Network and Ports, by the European Agency for Reconstruction, set the target to “increase cargo transport on the river by 20% by 2020 compared to 2010 among others by solving obstacles to navigability”.

But only this past March, the Serbian Ministry of Construction, Traffic and Infrastructure issued a tender to remove 21 vessels of the estimated 220 that are scattered along the Serbian stretch of the Danube. This is just a fraction of the work needed and in the meantime, these hazards will continue to lurk beneath the surface – despite being a known problem.

I believe that the ignorance of the threat from these submerged ships and their explosive payloads serves as a good analogy of the

marine industry's attitude towards a problem lingering just below the surface: that of workforce shortages.

During the pandemic, for example, the conditions ship crew were subjected to – unable to leave vessels after their contracted sea time had come to end – were uncovered. A disregard for crew welfare by national governments around the world led to 400,000 seafarers stuck on ships.

Refusing to further accept the working conditions and treatment we offer, particularly as the pandemic has shown that we can often work from anywhere, staff is now seeking more flexible working arrangements – not only in the maritime but in other industries.

It would be foolish to assume that we can replace these workers easily as there is a manifold movement among individuals to take back control over their life and work.

2021 brought the “Great Resignation,” with employees in western countries, China, and India voluntarily resigning from their jobs, demonstrating the power to choose how much of their life they want to dedicate to work. *Harvard Business Review* studied global employment records, concluding that resignations were up 20% among the core group in the 30-45 age bracket.

As a result, teams were left understaffed while still reeling from the pandemic, leading to this summer's phenomenon of “quiet quitting,” widely discussed on social media. It, again, is an empowered move to no longer accept doing additional tasks at work, which are sometimes asked short notice and late in the day, without compensation.

We can also see pushback across the globe from marine workers, too. In the UK's busiest container port of Felixstowe, workers have brought activity to a standstill with a strike, demanding a salary increase in line with inflation. In the US, port workers have been negotiating with shipping companies and port and terminal operators over salaries as well as automation of container-handling.

The latter is particularly the case in California, where workers that have been fighting the pandemic-induced ship backlog, have been vocal about the threat of having their jobs replaced by remotely controlled cranes.

These will not be easy issues to resolve, and it is likely that other instances of labour conflicts will arise in coming months with rising cost of living adding pressure to this fraught situation.

Given the challenging working conditions of the maritime sector, we would do well to address known issues and do our best to improve working conditions and offer flexibility where possible.

Otherwise, we may also find ourselves facing explosive working conditions when we have a draught of skilled workers. ■



VLADISLAV VOROTNIKOV
Freelance journalist

The endgame of the Russian-Ukraine crisis is nowhere in sight, and hardly anything could be said about the future of the Ukrainian seaports. On the other hand, Russian seaports are not being destroyed by bombs and missiles, but the damage caused by Western sanctions, also seem tremendous, as a slump in cargo flows could kill planned development projects, and drive this sector into a deep depression. ■



STEPHEN COUSINS
Freelance journalist

Any assumptions that the pandemic helped stem the flow of narcotics through European ports or deterred criminal networks from reaching key markets are put paid to by two recent reports that highlight a recent ramping up of drug trafficking activity, including much larger seizures and evidence of dangerous new tactics used by gangs. ■



Making a name for yourself

Michael Achagwe Luguje, the director general of the Ghana Ports and Harbors Authority and IAPH vice president for the Africa region, talks to Patrick Verhoeven, IAPH managing director, about opportunities and challenges for western and central African ports

INES NASTALI

M

ichael Achagwe Luguje has a clear vision for putting more of Africa on the global map. "I don't think we have a lot of choices. It's a globalized world, highly interdependent. In Africa's case, our participation in global trade is

under 5% and inter-African is just about 17%," the director general of the Ghana Ports and Harbors Authority (GPHA) and IAPH vice president for the Africa region, said when speaking to IAPH managing director Patrick Verhoeven.

Even increasing the percentage of pan-African trade using local services is difficult, as Michael explained, "We are import dependent countries, importing the same type of goods from Asia, Europe, and the Americas. So, if we decide to have our own vessels to carry African cargo, we're going back to the 70s, where similar attempts failed. Many African countries set up state-owned shipping lines to carry their own cargo. But of course, governments were bigger importers in those days, and the world was not as globalized as it is now. But even then, those shipping lines collapsed largely due to competition from bigger players and inefficient management. Today, the private sector dominates the import and export market. A government cannot force a private company to use a particular shipping line, so it's difficult to legislate in this area."

Consequently, "All we can do is to look at our own demand for shipping and then leverage that, as a continent, to negotiate better terms and forge partnerships with foreign shipping lines rather than focusing on how to exclude the foreign lines." However, at the same time, he is open to look at coastal short-sea shipping and a potential cabotage system as an avenue for the sub-regions and continent to increase the participation of local players.

Making a list ...

To improve the competitiveness of the western African region, Michael is looking at a number of challenges, such as the congestion on the waterfront, "the port city interface, and, of course, digitalization." Many of the ports were built in the 1950s, mainly to support smaller, populated economies and then cities were built around them. Then as time passed, trade grew and so did the population.

Pictured: Michael Achagwe Luguje.

Photo: EU/Source:EP

“But many of the ports did not expand in tandem, many were overtaken by the trade and demographic growth, thereby making expansion a challenge, partly because the smaller countries and economies didn’t really have the ability to attract the investment needed to expand commensurately,” said Michael.

He also knows why. “Most of the time, there is a certain level of conservativeness that ports say, ‘We don’t need to expand too much because we might be producing over capacity that will not be utilized.’ And so for most of the time, some wait until trade volumes far exceed the port’s facilities before we begin to look at planning and developing infrastructure.”

The port of Tema in Ghana, for example, does not have any room to expand inland as it is surrounded by the city, with the only expensive option to reclaim land from the sea. “As a result, you find many countries trying to look at new port locations outside the main cities and existing ports. Hinterland connectivity for many of us is also not very efficient. Many countries and ports rely on only road transportation as there are no other modes of transport such as railways or inland waterways. Cargo transportation to and from the ports therefore has to, again, compete with urban traffic on the roads,” the head of the GPHA explained.

That is where digitalization comes into the picture. “We’ve tried to join the rest of the world for a long time. Many of us have made progress, but at different levels across the continent. So far, we are learning from each other and see how we can progress. Many countries have port community systems in place, others have national single window platforms, while a few other countries don’t have anything at all. They are still manually processing cargo in and out of the port,” said Michael.

He added, “We as ports, are learning quite a lot among ourselves and from best practices within the IAPH fraternity in order to improve existing systems.”

... and checking it twice

The same goes for the green transition, which amid challenges, offers opportunities for west African ports. “The new area is green energy and we are looking at the Western countries that are also still learning. So, I’m trying to see how we in Africa critically explore and utilize renewable energy instead of solely relying on fossil fuel,” he said.

Having already received a few private sector proposals to develop wind and solar energy and be able to sell it to the ports, Michael and the GPHA are keeping a close eye on considering options and trying to attract new business as a supplement. “Apart from its sustainable impact on the climate, the generation and use of green energy must be encouraged because it will be cheaper for us ports.”

Africa has abundance of solar energy. It is just a matter of developing the technology to be able to attract it sufficiently to power the port and also help port communities. “And of course, LNG projects are coming up. We never had that in Ghana, only in Nigeria because of its abundance of oil and gas. But we now have a private sector concession in the port of Tema where an LNG terminal has been built to supply the industry within Tema and also target a higher market share in Ghana and the neighboring countries. The terminal is scheduled to open by the end of 2022,” Michael disclosed. The Ghanaian ports are also looking at onshore

power supply for vessels, however, “you need to be sure you have a reliable grid before you can supply to vessels. Unfortunately, for many countries, you can’t totally rely on the national grid. In many cases, ports must have huge electric generators that are supposed to stand by in case the national grid goes off,” he said.

But there is no doubt about the necessity of this. “We are all pushing to promote that whole agenda of renewable energy because it is the future.”

Patrick agreed, “I think that’s clearly a future opportunity. I think for Africa, not just to provide the ports with energy, but I think also to develop the ports into energy transportation hubs, that is clearly where there’s a lot of increased attention now. But also, South America where future fuels could be produced and transported to other parts of the world.”

The general trend of turning ports into hubs is therefore something Patrick wanted to know more about. Perhaps the most openly ambitious one in North Africa is Tangier Med, presenting itself as a hub for the entire continent. Patrick was curious to know — with Michael based in West Central Africa, which also has a natural hub potential for the continent — how that concept is evolving and about the competition between the different regions trying to claim the title as gateway of Africa. “We’ve had this debate over and over. We’ve always asked, if you are supposed to just build a port and say you are the hub or you’re supposed to consider all other advantages that you have in partnership

“We are just trying to learn from each other”

MICHAEL ACHAGWE
LUGUJE

Director general, GPHA



with shipping lines? All these factors contributed in the development and positioning of Tangier Med.”

So far, Tangier has captured Asia, and Europe as the first port of call in Africa before cargo is distributed south. “But, in West Africa, Abidjan is developing, Tema in Ghana is developing as a hub. Lagos is also developing as a hub and if you go south, you have Pointe Noire in Congo, and also of course Port of Durban in South Africa,” Michael argued.

Consequently, hub development is not an individual project. “You have to assess your competitive advantages and provide the requisite infrastructure. Your location could be an advantage, but we shouldn’t so much concentrate on the competition. We should provide port infrastructure to serve national and regional trade, and do so collaboratively with shipping lines. The question should not be whether some ports should define themselves as fit to be feeder ports, and others to be hub ports,” the GPHA director said.

For Patrick, the key point in attractiveness points to the carrier. “And the cargo by extension, in terms of how you are connected and how you can provide a service. Ports are many and cargo owners are many, whereas the number of carriers is limited, so it’s about who has the ultimate bargaining power to dictate where flows are going. That’s a tricky one,” he said.

Requesting feedback

One way ports’ relevance gets measured is therefore by their contribution to the growth of national trade. “Absolutely, so we work with shippers’ councils, with the chambers of commerce and with industry associations to identify the major shippers that are bringing business, where are they located, what kind of business are they doing? Are they satisfied with the port services? What challenges do they have and how ports can help address them? This is a constant debate. And then how are port users coping with our tariffs? Are we too expensive?”

Michael knows that seaports have an obligation to make themselves also attractive to the landlocked neighbors who generate a lot of maritime traffic. “In being attractive and competing for their business, we should keep the common objective to give them access to maritime trade in mind. We’ve therefore held many conferences to discuss among ourselves as ports as to what we should be doing to better serve our landlocked shippers,” he explained his strategy.

“Where does operation end and competition begin?”

PATRICK VERHOEVEN
Managing director,
IAPH

In this context, a question — again — arises, according to Patrick. “Where does operation end and where does competition begin? I think that’s a delicate one because if you start talking about comparing prices, you may be accused of anti-competitive behavior. I guess that many of the ports being government-owned, the tariffs will be publicly available, but what is, of course, commercial is the negotiation part on those tariffs and rebates that you can give,” he said. At the same time, one needs to make the region as a whole as

attractive as possible to customers. Citing work with the European Commission and African trade bodies, Michael said, “We are focusing on learning from each other, from those outside the continent, under the IAPH umbrella, and then seeing how best we can collaborate to grow maritime trade through our ports. That is what keeps ports surviving, without trade we cannot survive.”

This is also something he learned during his time as executive secretary of the Pan African Association of Port Cooperation and secretary general of the Port Management Association of West and Central Africa.

Checking in

Establishing a connection with the general public is also something the GPHA works on. It has set up a platform called Eye on Port with a weekly livestream to keep port community residents and the entire country updated on the port ongoing. “During the weekly live television programs, the public calls in to ask questions, seek clarifications about activities in the port, and they learn about the contribution that ports make to the entire economic development of the country.”

Looking ahead

Discussing what kind of progress he would like to see in five years, Michael said, “I want to see African ports much more open, better connected to the hinterland and within the maritime landscape.” Second, “Our continent to have made significant progress in the free trade project that we have started under the African Continental Free Trade Area, so that more maritime cargo can be generated within Africa and shipped through our ports. Of course, I want to see Africa much more active in the IAPH than now to enable us to learn from the good lessons of our colleagues and implement them effectively for the benefit of our continent and international trade in general.” ■



PERSPECTIVE ENERGY SUPPLY

New energy landscape: Impact on and implications for ports

European ports are transport gateways; they are at the crossroad of supply chains, they cluster industries, and are important interfaces for the development of the blue economy. As active players in all these fields, they are not only consumers of energy but also play a significant role in supplying Europe – through production, import, and storage – with the energy it needs. On average, 40% of the commodities entering or leaving Europe's ports are sources of energy.

It goes without saying that the European Union's ambition to decarbonize is a real game changer for ports in Europe. The Russian invasion of Ukraine obliges Europe to become less dependent on Russian energy by diversifying supply of energy and accelerating the roll-out of renewable energy production. To understand the magnitude of

the energy transition in Europe, one needs to consider the different goals Europe has put forward: The EU Green Deal aims at an emission-free economy by 2050. This long-term goal has been complemented with a concrete package – Fit For 55 – of measures aiming at a 55% emission reduction by 2030. The European Commission recently presented the REPower EU plan, which further strengthens certain Fit For 55 targets.

While the energy transition is high on everyone's agenda, it is often difficult to decide the role a port and its port managing body should play. Becoming active in different energy sectors has far-reaching implications in terms of investments, infrastructure, and spatial planning. To analyze and clarify these implications, the European Sea Ports Organization (ESPO), together with the European Federation of Inland Ports (EFIP),

decided in 2021 to ask experts to sketch the different energy transition developments and to analyze the role port managing bodies can play, as well as to evaluate the impact and implications of these developments on European ports.

The study aims to assist ports in defining their individual decarbonization pathway. It will also be a helpful tool for policy makers wanting to understand the role of ports in the energy transition in more detail. The study, published in June, was commissioned out to Royal HaskoningDHV and has been executed by identifying the most relevant energy transition developments for the different levels of the port, the port area, as well as the wider economy. Seventeen factsheets explain specific developments, drivers behind those, potential impact on port infrastructure, the challenges and enablers, and the



ABOUT THE AUTHOR

ISABELLE RYCKBOST has been the secretary general of the European Sea Ports Organization (ESPO) since 2013. Before that, Ryckbost was a senior advisor for ESPO and the director of the European Federation of Inland Ports. She has also worked in EU public affairs as well as the European Parliament.

role of ports and port managing bodies. For each development, the report also identifies key features of the best-fitting port profile and provides some key findings and overall conclusions on the impact of the energy transition on ports and port managing bodies.

Opportunity outlook

Electrification of equipment, the use of alternative fuels, and related operations in ports are expected to require additional space for grid connections and power systems, charging/bunkering facilities, storage and locations, and transport of energy and materials via pipelines or vessels, which will impact the overall port and terminal layout. Since many ports face scarcity of available land, trade-offs will need to be made, especially since renewable energy and its carriers will require more and safe storage to match supply and demand. Compared to diesel, fuels such as LNG, ammonia, and hydrogen might take up two, three, and four times more space for storage, respectively.

Looking at the challenges related to this, the study identifies four main ones: First, the high investment levels, the difficulty to secure funding, and the complexity in investments decisions. Second, spatial planning will become more difficult, certainly for ports near urban areas. Third, given the increasing role of ports in the new energy supply chain, port managing bodies will have to develop

Pictured: Tanker *Marlin Appetite* during a visit to the Port of Antwerp-Bruges.

or recruit the needed energy and project development skills. Finally, the report points out the difficulty to ensure continuity of operations while moving forward in the transition. Funding for the implementation of the energy transition and risk mitigation, as well as cooperation among ports and between ports and their stakeholders, and very importantly, a port governance model, which gives the port-managing body more tools and competencies, are seen as main enablers.

The report shows that they are increasingly taking on a broader and more active role to make the energy transition happen and to future-proof their port. The consultants found that the role of the port managing body is also determined by the maturity and market readiness of the available technologies.

The report clearly sees a series of opportunities, which the energy transition is offering to ports. Investments in initiatives on energy savings and renewable power generation can generate energy cost savings. Current market shares can be maintained or expanded by proactively moving in line with the market direction, for example, by securing new flows of energy commodities or providing alternative fuels. The energy transition can also be an opportunity to attract future industry and

business, and thus secure or grow long-term land-use returns. Many ports are looking to replace the fossil fuel-based industry and services with clean industry and offshore renewable businesses. By offering and accommodating zero- and low-carbon facilities, ports can contribute to emission reductions of their clients and improve the competitive position of the port.

Offering the enabling industries, terminal operators', and shipping liners' energy products, such as heat, CO₂, renewable electricity, or hydrogen, can generate additional revenue streams. Furthermore, the report sees a crucial role and opportunity for the governing body to manage the new supply chains through additional dedicated terminals and corridors, for example for waste and biomass. Finally, the study points out that a port, which is able to claim a larger role in the energy system by having a prominent position in transport, conversion, and storage of energy, will be able to get additional revenue streams from these energy flows, acting as a utility company.

The energy transition is progressively developing and complex. The current geopolitical situation adds on to this complexity. In that context, this study must be considered as a basis for further reflection and continuous discussion among our members, with the larger port community, as well as with policy makers. ■



Photo: Patrice Coppese/AFP via Getty Images



FEATURE ILLICIT TRADE

Big catch

Two new reports paint a disturbing picture of drug trafficking into European ports as criminal networks exploit new smuggling routes and concealment methods to evade the authorities

STEPHEN COUSINS



Trading of illegal drugs has taken a worrying turn in Europe in recent months as major ports across the region report exponential increases in seizures and increasing evidence of criminal activity.

Cocaine is a particular problem for the maritime transport. Shipments totaling 89,450 kg were intercepted in Antwerp in 2021, a one-third increase from 2020. Across the border in Rotterdam, 70,571 kg was seized, up almost 75% from the previous year. That gives a combined total with a record street value of €18 billion.

According to the latest analysis by the European Monitoring Center for Drugs and Drug Addiction (EMCDDA), criminal networks “continue to exploit established commercial maritime routes between Latin America and Europe to smuggle cocaine into the EU, taking advantage of the large volume of containerized trade in goods between the two regions.” This, it stated, enables them to “conceal large quantities of cocaine in individual shipments.”

As law enforcement tries to take a tougher stance, evidence suggests that criminal networks are increasingly

Pictured: Crew onboard the French *Le Ventose* unload three metric tons of seized cocaine. Photo: Patrice Coppee/AFP via Getty Images

switching to alternative cocaine smuggling routes and sending more cocaine shipments to smaller EU ports or neighboring countries where security measures are considered easier to evade.

In addition, drug traffickers exploit more inventive methods to conceal and extract drugs from containers. For example, recent CCTV footage from the Port of Rotterdam captured teams of cocaine collectors, employed by criminal gangs to infiltrate the port at night and retrieve cocaine hidden inside refrigeration units in unloaded containers.

According to a report on the BBC News website, Andre Kramer, who owns a container-processing company in the port, said these raids used to happen once or twice a year, but in the second half of 2021 “the groups of collectors have got bigger — 10 or 12 people gathered together, and it happens three or four times a week”.

Combating these nefarious activities demands a more proactive approach, but port agents and customs officials struggle to balance the free movement of goods with the effective control of containers. Many face staff shortages and then there is the additional insider threat of corrupt workers paid by criminals to facilitate illicit trade.

“There’s clearly this drugs supply push and bombardment of cocaine in containers, but how to deal with it is a major challenge. If ports and related specialists are already overwhelmed, what solution can we come up with?” Laurent Laniel, principal scientific analyst at EMCDDA said to *P&H*.

Toxic traders

Trading of illegal drugs has always been a problem, but two new reports confirm the ramping up of certain drug markets and changes to the routes and activities adopted by traffickers.

Figures contained in the World Drug Report 2022, published by the UN Office on Drugs and Crime, reveal that global cocaine production is at a record high and seizures of amphetamine and methamphetamine have skyrocketed. Markets for these drugs are expanding to new and more vulnerable regions, driven by harmful patterns of drug use that likely increased during the pandemic, it said.

Cocaine is increasingly being trafficked by sea and via a wider geography of routes, with almost 90% of quantities seized linked to maritime trafficking.

The report noted a growing number of large heroin seizures, of up to 1.3 metric tons, in the Arabian Sea and similarly large seizures made on ships arriving from Western Asia at a number of European ports.

The United Kingdom was the exception in Western Europe in reporting a marked increase in major heroin seizures in 2020.

The European Drug Market Report 2022, by EMCDDA, makes for equally sobering reading. It stated that underlying the region’s drug problems is the continuing innovation in the drug market, “which has led to the overall high availability of an increasing number of different substances, often of high potency or purity.”

It noted that cocaine trafficking toward the European Union continued during the COVID-19 pandemic “without any apparent disruption” and said large shipments



continued to be moved via commercial infrastructure, particularly intermodal container shipments.

Taking a deeper dive into the European cocaine market, a separate module published by the EMCDDA, noted that most drugs were smuggled into large container ports located in Antwerp, Rotterdam, and Valencia and Algeciras, in 2020. Significant entry points were also Hamburg, Le Havre, Dunkerque, Marseille, as well as Constanta, and Gioia Tauro in Italy. The German authorities, it stated, have attributed the recent increase in seizures in the Port of Hamburg to the activities in Balkan countries and Albanian-speaking organized crime networks.

According to the EMCDDA, the main departure points for cocaine destined for Europe in 2020 were Brazil, followed by Ecuador and Colombia — as has been the case for some years — and then Costa Rica.

“Drug traffickers act as parasites on the intense trade that exists between South America and Europe and the massive amounts of containers crossing the Atlantic every day,” Laniel commented.

The report noted that the most significant transshipment ports remain in the Caribbean, the West African mainland, and neighboring islands of Cape Verde, Madeira, and the Canaries.

Furthermore, trafficking networks use an increasingly wide range of secondary ports in Latin America, including Turbo and Buenaventura in Colombia, Villeta in Paraguay, and Vila do Condé in Brazil, in an attempt to avoid detection.

Stashed and stowed

Criminal networks are creative and adapt to circumstances, implementing a range of modus operandi to avoid detection. The EMCDDA noted a concerning rise in the amount of cocaine smuggled via the so-called rip-on/rip-off method.

This involves loading drugs in the box at the port of departure, often in large sports bags, then recovering them



Above: Members of the National Drug Control Directorate guard 1,747 kg of cocaine in Santo Domingo destined for Europe. The drugs were camouflaged as kitchen items.
Photo: Erika Santalices/AFP via Getty Images

in the destination port without the sender or recipient of the legal cargo being aware that the container was used for drug trafficking activity. Another version of this practice, known as Trojan horse, sees one or more people smuggled into the port inside an empty container, who are then instructed by phone to retrieve cocaine stashed in another container.

They bring the drug haul back to the original container, which is subsequently extracted from the port area.

Rip-on/rip-off was responsible for 212 individual seizures in Europe in 2020, making it the most popular technique, followed by drugs smuggled within legitimate goods in containers, which accounted for 166 seizures.

According to the EMCDDA, this is because corruption is a key requirement for rip-on/rip-off smuggling, with those with access to container terminals, taking bribes to stash or retrieve drugs. Many employees become trapped into a cycle of criminality when gangs threaten them with intimidation and physical violence. Kidnappings and murders of port workers have also been reported in various EU ports in recent years.

More proactive recruitment processes by port and customs officials could curb the phenomenon, said Cecilia Müller Torbrand, chief executive of the Maritime Anti-Corruption Network.

“In some countries, it may be relevant to review procedures for how a person qualifies to become a port agent or custom or other public official. Further transparent asset declaration would be important to trace big-scale

“If ports and related specialists are already overwhelmed, what solution can we come up with?”

LAURENT LANIEL, principal scientific analyst, EMCDDA

drug trafficking and involvement of public officials.” In addition, improved port governance, training to address corruption risks, and the implementation of trusted and action-oriented reporting lines to catch suspicious behavior all have a role to play, she added.

Containers are not the only focus of smuggling, and some innovative methods have been uncovered in recent months. Earlier this year, Spanish police, working in close cooperation with Europol and law enforcement from five other countries, seized the first ever semi-submersible vessel built on European soil used for drug smuggling. Similar vessels captured in the past were always made in Latin America.

In July, Spanish police seized three underwater drones capable of transporting drugs from Morocco to Spain, also breaking up the gang suspected of manufacturing them.

“Unmanned underwater vehicles containing drugs, if they can be made to work reliably, would be very difficult to counter and as a result may be used more widely in future,” warned Laniel.

Preventing the exploitation of ports as a key drop off and transition points for narcotics underlines the need for tighter security and monitoring. The World Drug Report recommends strengthening container control and interdiction capacities at ports and “sensitizing port authorities and commercial shipping companies to the related risks.”

Monitoring is a huge task given the masses of containers that are processed daily. A spokesperson for the Zollfahndungsamt Hamburg, a branch of the German customs investigation office, said to *P&H*,

“In Hamburg, more than 8.5 million TEU were delivered in 2021, so this represents a major challenge for customs,” adding that the port’s current risk management analysis is nevertheless working well. “We use state-of-the-art x-ray technology and sniffer dogs for the control. However, our colleagues’ instinct for detection is also essential.”

Antwerp, considered the main port of entry for cocaine into Europe, recently announced a €70 million investment to upgrade its facilities to scan 100% of containers, up from 1% to 1.5% today.

Florence Angelici, spokesperson for the Federal Public Service of Finance in Belgium said to *P&H*, “Antwerp today has one scanner on each bank of the river, but €70 million was made available to fund five new mobile drive through scanning systems, five new backscatters and the recruitment of 108 additional customs officers starting this September.”

She added, “This is a very important investment because cocaine drug trafficking could endanger the whole country; we have to avoid creating a country that is violent and dangerous.”

Given the alarming escalation in cocaine shipments into Europe, the more ingenious tactics used by criminal networks, and the shifting geo-political situation, including the unknown consequences of the conflict in Ukraine on smuggling, projects of this type and scale may become more frequent in the years ahead. ■



Shortsea shipping is a means to realize the ultimate goal of achieving excellence in the provision of seamless transport services in an economically, socially, and environmentally sustainable manner. Current market constraints are forcing ports to look for and bet on intermodality as an alternative mode to the classic container transport to alleviate congestion in ports.

Container transportation is highly efficient and was the real trigger for globalization. We focused on moving vast quantities of cargo from producing areas to consuming regions, looking for the most efficient way to distribute these cargos at regional scale. Now, we are facing a driver shortage crisis worldwide, but I would say that in Europe and the United States, it is more pronounced.

It makes no sense to have drivers away from home for weeks at a time, when by efficiently using intermodal means such as rail or shortsea shipping, they can focus on making the last mile and going home to sleep at night.

There are increasing restrictions on the circulation of heavy vehicles on the roads, not to mention the city centers. More and more operators see trailers as a commoditized transport unit and the ship purely as an extension of the infrastructure, such as the road.



The main advantages of shortsea shipping are evident: efficient, cost saving, environmentally friendly, and can reduce externalities, such as congestion, accidents, and wear and tear. Ports such as Barcelona are promoting this mode of transport, via an express system that speeds up all customs procedures, so that when the ship arrives at the port with correct documentation, the truck can leave without delay through the automatic gates of the terminal.

Another crucial point for the efficient operation of shortsea shipping is the connection with the railway. The port functions as a logistics hub where regardless of the mode of transport used, goods pass through as quickly, efficiently, and safely as possible. Thanks to the efforts of the shipping lines operating in the Port of Barcelona and the commitment of shippers and transport companies, last year we managed to divert 166,000 trucks from the roads connecting with Italy and the Northwest African countries, thus contributing not only to decongesting the roads but also the ports and reducing emissions and externalities.

Additionally, we also offer a comprehensive commercial rebate scheme to further promote shortsea shipping and continue to decongest infrastructures and make more sensible use of transportation. ■



THE DEBATE

Are ports prioritizing shortsea shipping services enough to relieve congestion and reduce emissions?



If executed smartly, shortsea shipping offers an efficient, low-carbon mode of transport, complementing the maritime supply chain. Especially with the need to decarbonize the supply chain and improve air quality around port cities, transferring cargo from trucks to barges and smaller ships can achieve those goals.

This would also reduce road accidents involving trucks. With ports being the interface between the sea- and land-based transportation modes, they can enable this switch.

However, smart also refers to running a port in a digitally connected way, for example, to enable clearing of vessels, transmission of crew and cargo data, as well as customs documentation online. The IMO Convention on the Facilitation of International Maritime Traffic made it mandatory in 2019 for national governments to introduce electronic information exchange between ships and ports for this data. As a survey conducted by the IAPH in late 2020 showed, only one-third of IAPH member ports that participated in the survey had such a port community system in place. One-third was in the planning phase to introduce it and another third had not started such an undertaking. The main reason for this is a common issue in the maritime supply chain: too many stakeholders on one side.



On the other, "the legal framework is a barrier, as it can frequently depend on competing or overlapping public administrations and governmental agencies at municipal, state, and national level," the IAPH stated in the accompanying report.

Without functioning cooperation to let other ports, let alone those that are inland and might not need to have such a system in place, know which ships will be sent on, shortsea shipping would therefore even contribute to more congestion, which is the opposite of what it is targeted to solve. Additionally, this means there is a need for a multi-modal vessel traffic management system, to which not only ports but shippers must have access. They wish to have a relationship with the carrier where they can see available barges, ships, and rail services online in real-time so that they can shift their cargo from the road to the rivers. However, the fact that shortsea shipping services are often handled by smaller carriers in a regional market, and thus in competition with larger operators, means they are less integrated into the maritime network.

Only when all stakeholders are flexible, willing to share data, and are open to learn, can shortsea shipping help to handle market uncertainties and new logistical challenges such as just-in-time arrivals. ■

NINETY

Readership results: Are ports prioritizing shortsea shipping services enough to relieve congestion and reduce emissions?

90%

10%

SEPTEMBER/OCTOBER
SHORTSEA

POLL RESULTS

Again, a very clear outcome of our monthly poll. The majority of respondents say that ports are not doing enough to enable shortsea shipping as a method of relief for the currently congested ports around the world.

That is assuming that shortsea shipping is a mean to alleviate the clogged berth spaces. However, recent examples of activating inland transport via the river network in mainland China or around the Ukraine show that this is an important part of the water transport network.

The result of the poll therefore calls on port authorities to make contact with their shortsea shipping providers to coordinate more frequent coastal shipping services. ■

NOVEMBER/DECEMBER | GOVERNANCE

THE POLL



Should there be a seat for political representatives on the board of a publicly owned port?

The question if political representatives should be on port of a publicly owned port throws up two arguments.

One, the port wants to maintain its independence and is not looking to have legislators join their meetings.

Second, the pandemic has shown that port authorities alone cannot enable administrative issues, such as crew changes, without support from other government agencies.

So, which way is best for port authorities? ■

Either scan the above QR code or use the web link below to submit your answer to this month's reader poll:

🌐 bit.ly/PHNovDecPoll



Rear admiral
Mohammad Musa

Rear admiral Mohammad Musa has been serving in the Bangladesh Navy for three decades and is now deploying his experience to upgrade Mongla port with military precision

INES NASTALI

Rear admiral Mohammad Musa has been leading Mongla Port Authority (MPA) in Bangladesh as its chairman since the beginning of 2021. Seconded by the Ministry of Shipping, he has led the port through the second year of the pandemic and is now focused on transforming the port into a regional hub. "I am working relentlessly to develop the port and transform it into an internationally standardized port that will ultimately make it a southwestern gateway, as well as a hub for regional connectivity. Thus, MPA is contributing to the national economy to a greater extent," he said to *P&H*.

His biggest ambition for the port, which is in the south of Bangladesh, a few kilometers from the Bay of Bengal along the Rupsa River, is therefore centered around infrastructure. "The increasing number of ships in the port – more than at any time before in the 70 years' history of the port – is a challenge." For this, the port is currently conducting capital dredging of the approach channel to increase the port's draft from 7 m to 10 m by the time works finish in June 2023.

"A mega project of upgrading is also in the pipeline, which is likely to start early next year. This includes building a multi-lane road network around the port, constructing a good number of container terminals, yards for containers and vehicles, and setting up marine and electrical workshop, office, and residential complexes," said Musa.

This project also includes automation, integration of different departments, stakeholders, and ensuring connectivity with the national multimodal transportation system such as roads, railway, and inland waterways to connect with the rest of the country and other regional destinations.

This will enhance Mongla port's capacity by around three times, with an envisioned throughput of 1.5 million TEU by 2040. Musa views Mongla as an overflow of Bangladesh's primary port, Chittagong. Recent congestion woes worldwide mean that his port needs to be ready to pick up cargo should the major trade center become

overwhelmed. Aside from recent closures recently due to COVID-19 restrictions, Chittagong regularly faces closures during public holidays or after monsoon flooding.

Auxiliary services

Mongla port is therefore also "procuring essential equipment to handle cargo and containers and is installing a vessel traffic management and information system to allow monitoring of vessel traffic in the 130 km river channel from the sea to the port area. This helps in monitoring and carrying out any search-and-rescue and salvage operation within the port limit," said Musa.

Within the port and the channel, a modern waste management and oil spill control system is being set up to comply with the IMO International Convention for the Prevention of Pollution from Ships (MARPOL). This enables safe navigation and protects the environment as the port lies in the Sundarban area, which is a world heritage site.

His focus going forward is also to ensure environmental compliance. "Ensuring safety against maritime pollution as per IMO standards while merchant shipping, the fishing fleet, and inland coaster and tankers navigate the narrow channel is a major challenge."

Additionally, "the port has more demand of drinkable fresh water than it can outsource or procure. As such, a project to generate fresh water of 4,000 metric tons per day is under way and this will meet the requirement of water for ships, institutions, residences, and offices within the port area as forecast until 2025," he added.

A master plan is currently being drawn up by a European consultant to highlight any expansion requirements and plan phases in accordance with the growing seaborne trade by the port and economic activities in the surrounding area.

Changes made

The rear admiral is pleased with changes made in port operations. "First, we reduced the turnover time of a ship by using good piloting and then efficient handling of cargo and containers using modern handling equipment to unload and load," he said.

On the shore side, "I have introduced a one-stop service for shipping, clearing, and forwarding agents and other stakeholders to process documents and obtain clearance in the quickest time."

Changes have also been made in the selection and recruitment of personnel who have sufficient IT knowledge to use modern handling system. "We have also introduced payments using online transaction while ensuring vetting by port security and clearance by custom authorities," he said.

Up to par

Despite numerous challenges, the rear admiral shares that he enjoys making the port function efficiently and generating a mindset to the employees on their contribution to the national economy.

Musa's sense of duty comes from serving 37 years in the navy where he commanded warships ranging from patrol craft to frigates, including the country's flagship, and served as the director of four directorates. "I also served

as naval secretary at the headquarters. I have commanded the biggest naval establishment and as naval area commander, I commanded the western and central navy," he said to *P&H*.

His close network to other government agencies comes in handy in his current endeavor. "I hasten

the pace of management and engage national authorities including shipping, planning, and finance ministries to accord necessary approval or support in the process," he said.

He concluded, "I strongly believe that all the development works and procuring additional hardware and software with a set of skilled manpower shall transform this port into a smart international sea port where regional and global seaborne trade will be managed efficiently while complying with different international regulations of the IMO." ■

"The project enhances Mongla's port capacity by three times, with a throughput of 1.5 million TEU by 2040"

Regional disparities accompany positive expectations

IAPH survey-based quarterly dashboard and detailed report unveil critical changes in the global port industry

THEO NOTTEBOOM AND THANOS PALLIS

The second issue of the IAPH World Ports Tracker report provided participating ports with a survey-based assessment of port-related trends and expectations for the coming months divided by world region. It is the first report of its kind to monitor trends of all cargo types handled at world ports as well as cruise and passenger vessel activities. Close to 100 ports provided survey data on vessel call numbers, hinterland transport status, warehousing capacity, staff availability, and cargo and cruise activity. Only ports that contributed to the survey received the complete analysis in return for their data sharing effort. A dashboard showcasing an excerpt of the survey results can be found on page 21.

In the second quarter of 2022, half of the reporting ports noted an upward trend in the calls of container ships, dry bulk carriers, and other cargo vessels.

Marginally, this trend is the least positive for tankers and gas carriers, with only 43% of ports recording year-on-year growth of more than 2%.

The survey revealed, however, significant regional disparities. Asian ports show the most optimistic figures in container trade, while Northern European ones have the least bright figures. For dry bulk vessels, Sub-Saharan African ports recorded strong results. In contrast, Mediterranean ports experienced balance results between expected increases and decreases, with quite a few ports at both ends of the scale.

With the ongoing global supply chain crunch impacting many of the world's ports, the report delves into hinterland connectivity, warehouse utilization and regional analyses of these data. One-third of North American, Sub-Saharan Africa, and Mediterranean ports face considerable or significant delays, with the weighted global average at 15%. Ports in North America, South America, and North Europe recorded an underutilization of warehousing facilities more frequently.

Obtaining forecasts from respondents on how they see vessel calls and cargo and passenger volumes in the upcoming twelve months develop, revealed some positive expectations. 30% of respondents expect a year-on-year annual growth rate in container volumes of more than 5%, while about 12% are preparing for a volume decline. One-third

of the ports expect a growth of over 5% for the dry bulk market, and only one out of 10 foresees a modest volume decline. The expectations for liquid bulk and other cargo flows are slightly lower - with the survey results showing remarkable regional variations, as detailed in the full report.

The survey will be regularly combined with container port statistics based on the S&P Global Market Intelligence Port Performance Program, which offers aggregated data on vessel calls and sizes, call sizes, and port moves per hour, aggregated per region on a quarterly basis.

Looking at the evolution of vessel calls per region, all, except Northern Europe, witnessed an upward increase in container vessel arrivals in second quarter 2022 compared to first quarter 2022. It is early days to conclude that the downward trend initiated by COVID-19 is starting to reverse. Container vessel activity in North European ports in second quarter 2022 was a hefty 30% below first quarter 2017 level.

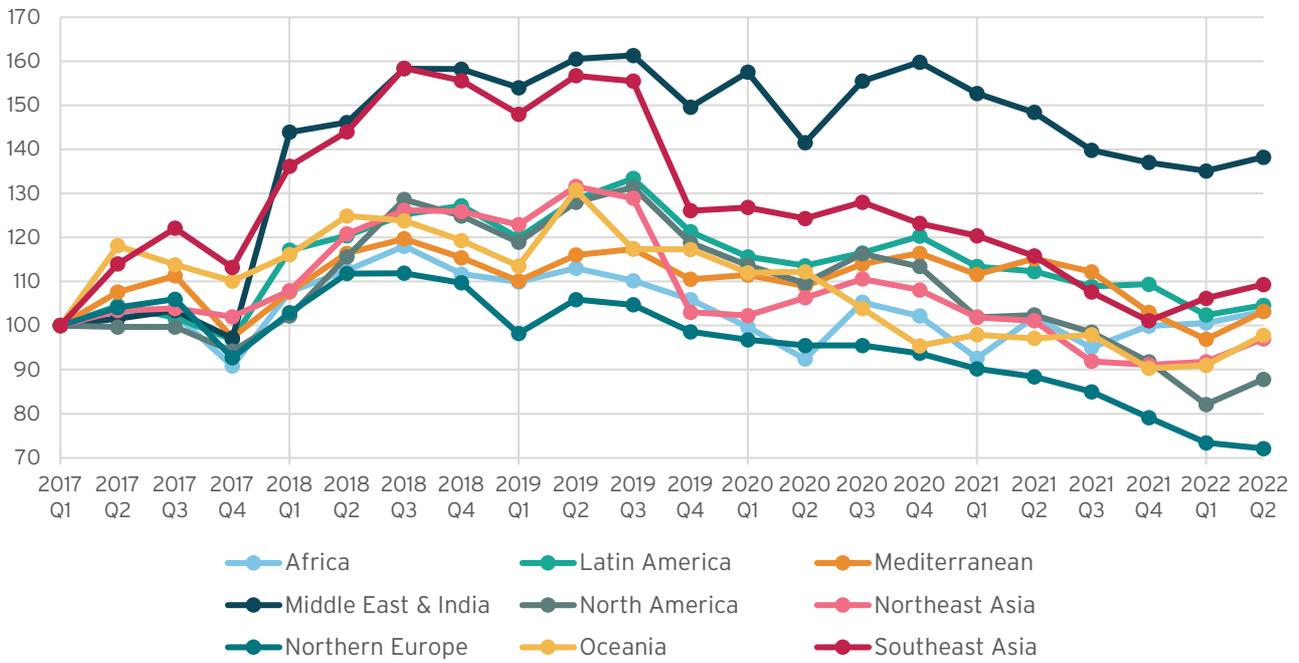
Over the past five years, most regions have accommodated ever larger vessels and bigger call sizes. Still, Northeast and Southeast Asia recorded a strong decline in average call sizes since the last quarter of 2021, while Northern Europe and North America saw the strongest increase. The most recent quarterly changes in the share of 8,501 TEU+ vessels in total container vessel calls are quite modest in most regions. Northeast Asia remains the only region breaking the 35% threshold in 8,501 TEU+ vessel share in recent years, while North America, Northern Europe and Middle East & India reach around 30%.

The regional data on port moves per hour demonstrates that North America, Oceania and Africa witnessed a significant decline in port moves per hour since 2020, with North America eventually seeing some improvements in the past few quarters. A recent surge in productivity brought Southeast Asia back on top as the best performing region. Quite a few regions are hovering around the 100 threshold, pointing to a productivity level comparable to early 2017.

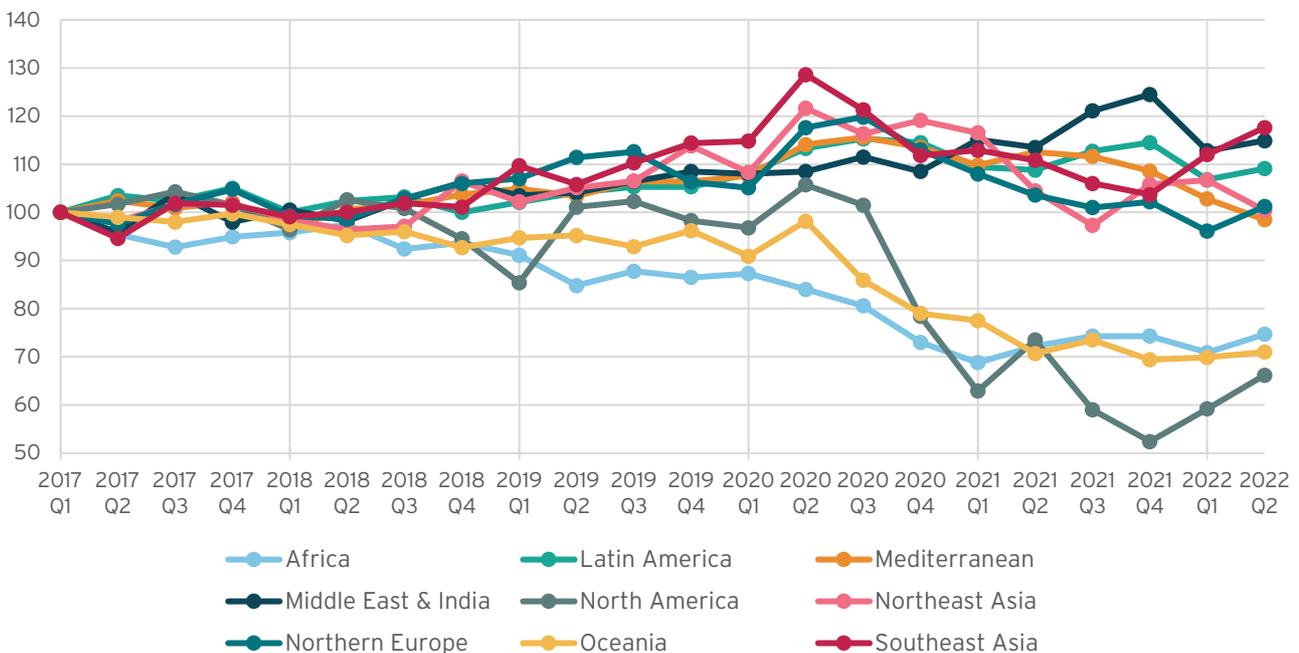
The next survey will go out in mid-October, following the end of third quarter 2022. Ports are invited to join the World Ports Tracker community to benefit from receiving the full detailed and timely distributed, exclusive IAPH report. ■



Vessel calls per region (index-based reporting with Q1 2017 = 100)



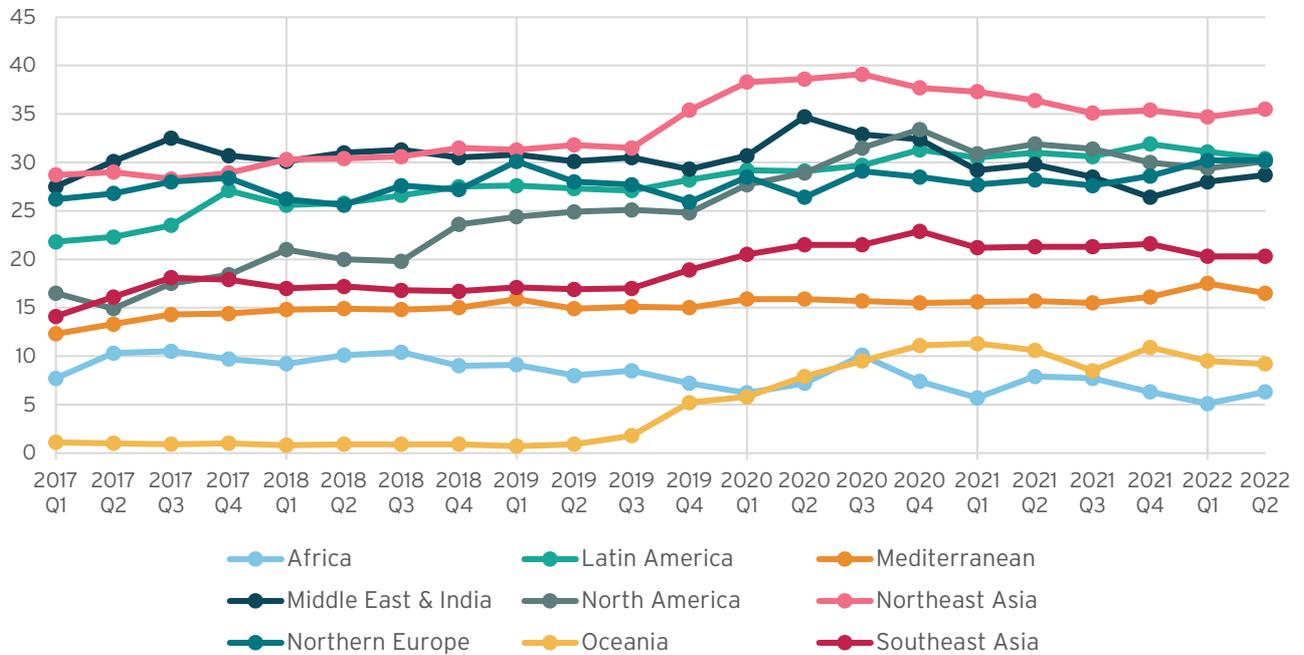
Port-moves-per-hour (PMPH) per region (reporting quartile development, index-based with Q1 2017 = 100)



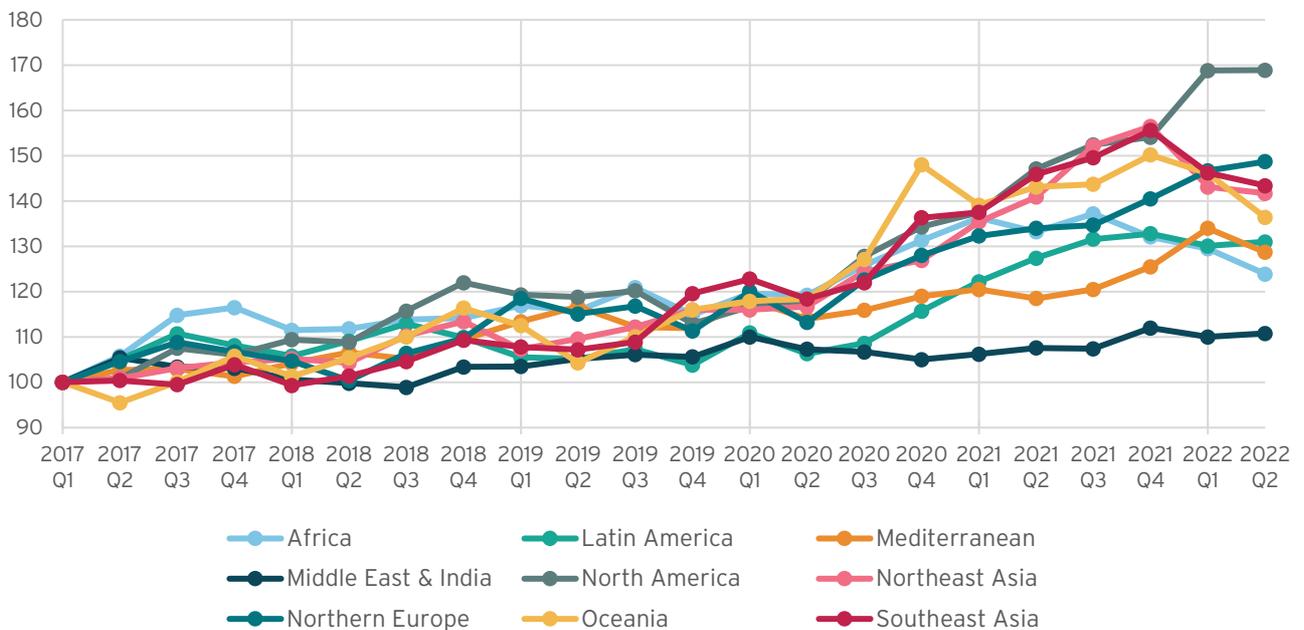
Port-moves-per-hour (PMPH): Total moves recorded divided by total port hours recorded over the period.



Evolution of vessel size per region (reporting share of 8,501 TEU + vessels in total container vessel calls, compared with Q1 2017)



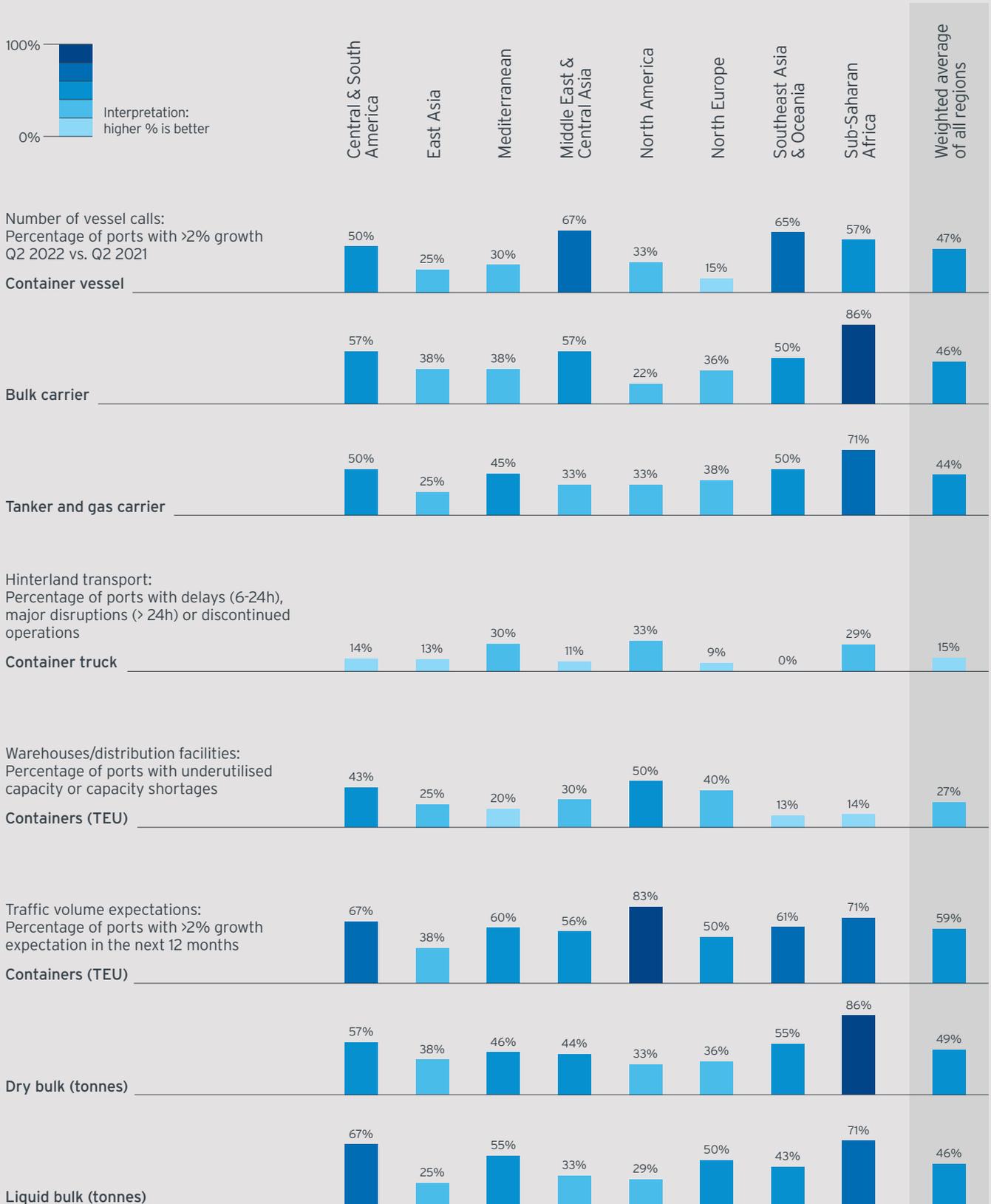
Evolution of call size per region (reporting quartile development without call size band reference, index-based with Q1 2017 = 100)



The index is created using the average regional values per quarter (total moves/total calls).



Excerpt from the IAPH World Ports Tracker (Q2 2022)





SANJAM GUPTA
Director, Sitara Shipping

THE COLUMN

Bangladesh needs to diversify its ports

Bangladesh is one of the most densely populated countries in the world, with a density of 1,265 persons per square kilometer. The latest population projections show that the annual growth rate will decline from 1.2% to 0.37%, leading to a population of 200 million in about three decades.

On the other hand, the rural-urban migration rate is also growing, creating challenges for urban planning. In this context, the potential and efficiency of its port infrastructure can cater significantly to the resilience and competence of the country's economy as a whole.

Therefore, it is of the highest priority to boost the efficiency of the ports, including their essential road, rail, and inland waterway links, to evolve into more ambitious transport hubs with effective linkages.

There are presently three leading options for freight transport between Chittagong and Dhaka: road, rail, and waterways. Most of the national and regional highways are linked to Chittagong port. Traffic management is one of the ways to relieve traffic congestion and increase the port access road capacity.

To enhance the hinterland connection capability, the Bangladesh government has constructed an inland container river terminal at Pangaon, Dhaka, to facilitate container activities in the inland water transport sector.

Port growth in Bangladesh

Chittagong is the central seaport of Bangladesh, located in the south of Bangladesh, regulating more than 92% of the seaborne trade. The port is a river port situated 16 km upstream of the Bay of Bengal. The port has sequentially altered and adjusted the

handling facilities with stress on container handling. This has led to a dwindling scope for the handling of breakbulk and bulk cargoes, and there is a need to explore further expansion possibilities.

With a current share of 92%, Chittagong is by far the more extensive of the two seaports in Bangladesh that deliver services to international trade. It acts as a national hub; no transshipment traffic is taking place, and no transit volumes from

neighboring countries are accounted for.

The developed traffic prediction indicates that the Port of Chittagong has a significant development potential based on the import demand for raw materials, dry bulk, and food and the prospects of export-oriented initiatives in Bangladesh.

There are also other facilities that can improve Bangladesh's maritime prospects.

One would be the plans for Patenga Container Terminal near the river mouth, which if approved, would bypass all nautical constraints caused by the navigation channel. However, no studies have been carried out so far.

Chittagong Port Authority is also evaluating to shift all liquid bulk cargo facilities to a new terminal at the Bay of Bengal, thus confining these activities to the new terminal instead of separate jetties dispersed through the Karnaphuli River as it is today. ■

“Chittagong is the more extensive of the two seaports in Bangladesh”

ABOUT THE AUTHOR

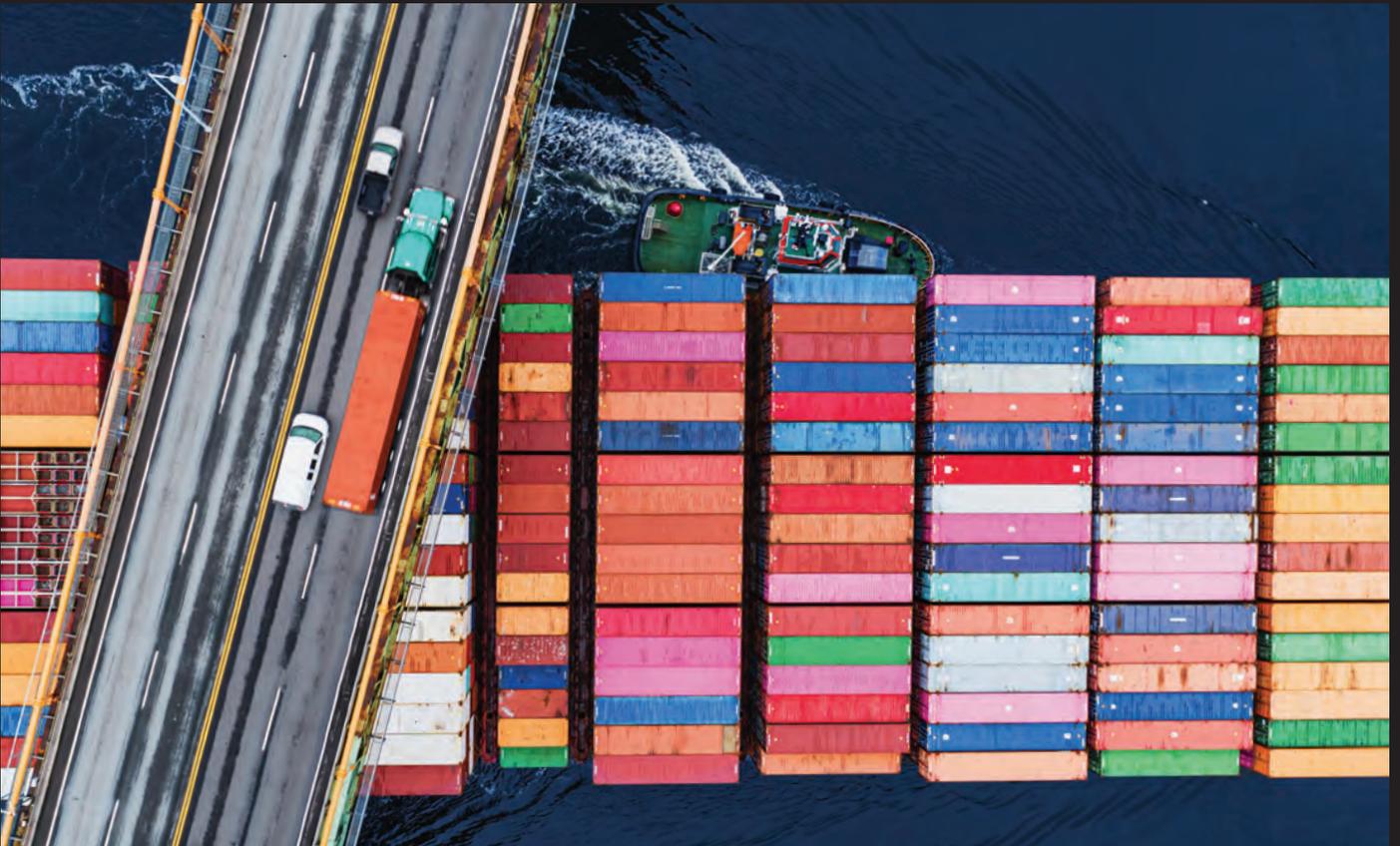
SANJAM GUPTA is a director at Sitara Shipping. She is also a founding member of the Indian chapter of the Women's International Shipping and Trading Association.

S&P Global

Market Intelligence

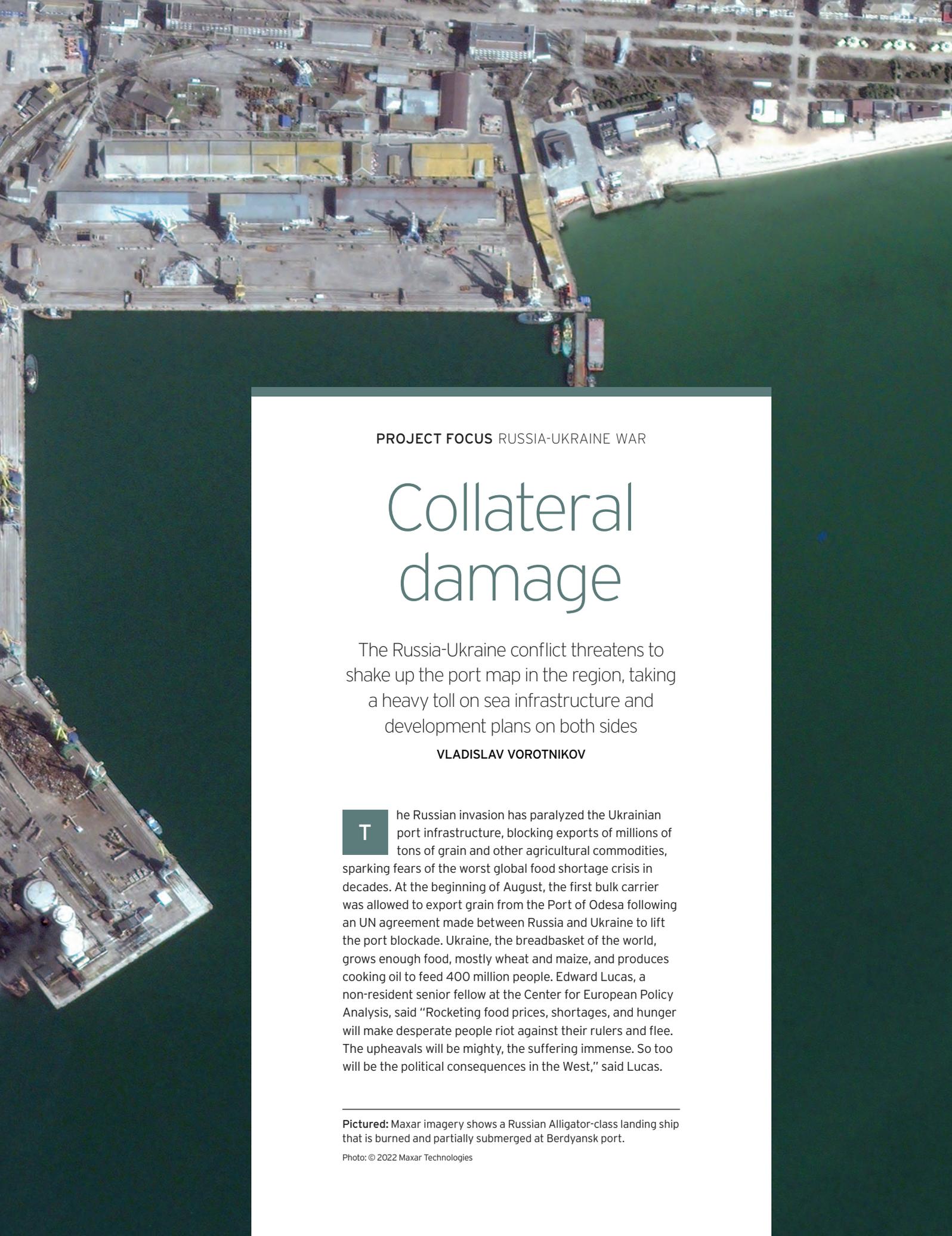
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PROJECT FOCUS RUSSIA-UKRAINE WAR

Collateral damage

The Russia-Ukraine conflict threatens to shake up the port map in the region, taking a heavy toll on sea infrastructure and development plans on both sides

VLADISLAV VOROTNIKOV

The Russian invasion has paralyzed the Ukrainian port infrastructure, blocking exports of millions of tons of grain and other agricultural commodities, sparking fears of the worst global food shortage crisis in decades. At the beginning of August, the first bulk carrier was allowed to export grain from the Port of Odesa following an UN agreement made between Russia and Ukraine to lift the port blockade. Ukraine, the breadbasket of the world, grows enough food, mostly wheat and maize, and produces cooking oil to feed 400 million people. Edward Lucas, a non-resident senior fellow at the Center for European Policy Analysis, said "Rocketing food prices, shortages, and hunger will make desperate people riot against their rulers and flee. The upheavals will be mighty, the suffering immense. So too will be the political consequences in the West," said Lucas.

Pictured: Maxar imagery shows a Russian Alligator-class landing ship that is burned and partially submerged at Berdyansk port.

Photo: © 2022 Maxar Technologies



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Shifting the blame

Asked about the future of southern Ukraine in May, the spokesperson for Russian President Vladimir Putin, Dmitry Peskov, said that only local people would determine its fate, rejecting claims that Russia was seeking to permanently occupy the Ukrainian territory it controlled.

However, during the entire conflict, Russian politicians and top military officials expressed rather controversial statements about the eventual target of the current military campaign. Russian general Rustam Minnekayev declared on 22 April that Moscow wants to seize all of southern and eastern Ukraine, turning it into a land-locked state.

Currently, Russia controls three of Ukraine's largest seaports: Kherson, Berdyansk, and Mariupol. Speaking during his visit to Kherson in early May, Russian senator Andrey Turckak told locals, "Russia's here forever." There are also signs that Russia intends to integrate the southern regions into the Russian economy, as it already rolled out a currency switch from the Ukrainian hryvnia to the Russian ruble.

Losses worth billions

There is no clear information about the present conditions of some Ukrainian ports, but at least some of them have been heavily damaged during fights. The direct damage Ukraine's infrastructure suffered reaches tens of billions of hryvnias, estimated Yuriy Vaskov, deputy minister of infrastructure.

"The worst infrastructure damages are in the Mariupol seaport. The infrastructure also suffered in the Port of Berdyansk, and in the Port of Olbia, recently concessioned to a Qatari company. Certain damages are also seen in the Port of Chornomorsk, and in the Port of Mykolaiv," Vaskov said, adding that the Ukrainian infrastructure ministry could provide concrete figures once it regains access to the ports located on the currently occupied territories.

On 2 May, the Ukrainian government announced the temporary closure of four main seaports – Berdyansk, Mariupol, Skadovsk, and Kherson – citing "an inability to carry out servicing of ships and passengers, carry out cargo, transport, and other related economic activities, and ensure an adequate level of navigation safety."

The authorities admitted that the announcement has been made only as a formality as Russia had already blocked or seized control over these seaports by that time.

Attempts to relaunch seized ports

However, it looks like the Russian administration does not want the Black Sea ports to remain closed. The Mariupol seaport will resume operation in full, although Western sanctions make the task of equipment renewal tricky, Denis Pushilin, head of a Russia-backed rebel republic said on 27 May, as quoted by the Russian state news outlet Ria Novosti.

The first shipment was slated to take place at the end of May, although it is likely to take more time for the Mariupol seaport to resume operation, given major destructions, Pushilin said, referring to heavy fights that took place in the city, including at the port territory in March and April.

The conditions of the port equipment, such as lifting cranes, left a lot to be desired, he said, adding that equipment modernization would be hampered by sanctions.

On the other hand, Kherson port has been spared major destruction, but it is unlikely to resume operation, given the proximity of the frontline.

The only way to the sea from the Port of Kherson is blocked as the Ukrainian forces retain control over the city of Ochakov, located at the exit from the Dnieper estuary, said Kirill Stremousov, spokesperson for the Russian administration in Kherson.

In addition, shipping in the Black Sea is unlikely to be safe in the coming months owing to numerous sea mines deployed in the region.

Silk Road as a security guarantee

While the current crisis shows no real signs of letting up, Ukrainian officials and analysts have already discussed the post-war future of the country's port industry.

Recent opinion polls show that up to 70% of Ukrainians are confident that their country will eventually prevail in this conflict, but there is no confidence that a new invasion will not happen again in several years.

One of the safety guarantees could be linked to giving world powers, such as mainland China and Turkey, bigger access to the Ukrainian port infrastructure.

"China has been looking for alternative routes for a long time to replace Russia and Belarus in the transport corridor called the New Silk Road," said Alexey Kushch, adviser to the president of Ukraine Bank Association, adding that in the



Pictured: Aerial view of Kherson, Dnieper River, and the port area.

Photo: Getty Images/Yevhenia Kudrova

new reality, those searches intensified, given that the transport and logistics ties between Russia and the European Union have been severed by the current conflict.

“China understands that the EU will at some point close all transport links with Russia and impose sanctions against the Russian railway monopoly Russian Railways,” said Kushch.

The eastern powerhouse previously considered establishing transport links through Afghanistan, Iran, and Turkey, but this plan faced problems as Turkey does not want mainland Chinese goods to flow to the EU through Greece, while mainland China does not want to build a transport corridor through the Balkans.

“Therefore, Ukraine could offer these two countries a joint project to create a free port zone in Odesa, which will become a transport hub for further exports of Chinese products to the EU. This way, we will be able to earn fees, but also get a kind of security umbrella from two strong armies. We do not know how the war will end, but if Russia tries to arrange a naval blockade again, it is unlikely that it will risk attacking Odesa, where there will be Turkish ships with Chinese goods,” said Kushch.

Russia is braced for isolation

However, not only the Black Sea ports are expected to feel the brunt of the conflict. The cargo turnover of the Russian seaports in 2022 will decrease 30-50% owing to the departure of the largest sea carriers from the country, Russian newspaper *Sea Ports* reported, citing market participants. The overall losses of the Russian transport industry are projected at \$5 billion in 2022.

The first signs of the crisis can already be seen. In March, the St Petersburg sea port registered a 41% drop in cargo turnover, the Administration of the Sea Ports of the Baltic Sea said, citing sanctions as a main reason for the decline.

There is no clarity on how Russia could prevent the port

industry collapse. The Russian government has declared its goal to turn trade flow eastward in the direction of mainland China and Southeast Asia to secure additional traffic for the Russian seaports. In 2021, the EU accounted for 33% and the United States for 12% of the Russian foreign trade. The share of APEC countries amounted to 33% in 2021.

“Russia needs the already proclaimed turn to the East,” said Andrey Tenishev, head of the Department of Competition Law, at the Russian Presidential Academy of National Economy and Public Administration.

“Trade with the EU and the US must be replaced by trade with the countries of Southeast Asia. The share of imports from these countries should increase to almost 80%, and cargo traffic could increase to almost 10 million containers per year,” Tenishev added.

However, most cargo from the Southeast Asian countries is transported by ocean container carriers that pledged to boycott Russian seaports, he said.

“Our own container fleet cannot even partially cover the transportation needs. There is a catastrophic shortage of sea containers and they are almost not produced in Russia. Our companies, such as Trans-Container or Fesco, do not have enough containers, the necessary fleet of container ships and can provide a negligible share of the necessary transportation,” said Tenishev.

Even if one day Russia manages to produce or purchase containers, there is no understanding how to carry them, given the lack of ships, he warned.

However, so far nothing is being done to overcome the upcoming storm. “The general impression is that all concerned departments and companies do not realize the scale of the problems and are in shock. The decisions made are chaotic and ineffective,” Tenishev added.

A source in the Russian port industry who asked not to be named said that most private businesses took a waiting stance on the development plans, looking forward to some certainty. “If that forecast of a 30-50% slump in cargo turnover really comes true, it will be a disaster. It will kill all port infrastructure development plans in Russia for years,” the source said. ■





LOOKOUT DROUGHT IN EUROPE

Dried up business

One of Europe's most used river transport arteries, the Rhine, faced critically low water depths in August amid the Russia-Ukraine conflict and associated energy supply crisis.

Despite no regulation on minimum water depth, operators might decide not to run services as they cannot fully load their ships and barges, making trips uneconomical.

While prolonged times of low water levels are part of the normal river system, the German Federal Institute of Hydrology acknowledged an increase in frequency of those, citing climate change as a cause.

The low water levels also coincide with the naturally occurring low levels of water for the Rhine at this time of the year.

Apart from fewer transshipments, deliveries of coal, oil, and gas for chemical and other factories along the river will be impacted. Those also rely on the river water to cool down plants.

Germany now looks to its rail network to distribute cargo.

The Rhine River is not the only one suffering from low water levels in Germany. In the north, the Elbe has reduced ship traffic so has the Danube in the east.

In the Netherlands, the Dutch part of the Rhine, the Waal, as well as rivers in southeast England also face critically low water levels. ■

Pictured: Ongoing low water level on the Rhine River around Oberwesel, Germany.
Photo: GettyImages/NurPhoto



PERSPECTIVE SANCTIONS

Sanctions compliance requires human sensitivity

Sanctions against Russia are creating major economic, industrial, and legislative complications that require sensitivity, context, and expertise that only people can truly provide.

More than 2,000 sanctions against Russian entities have been introduced to date and that number continues to grow. Moving from purely sanctioning companies related to key individuals, sanctions, for example, also include port call bans and a stricter purchase process of Russian hydrocarbon cargoes, regardless of the ownership of the vessel carrying them.

A traditional traffic light system is not viable in this scenario and could make decisions regarding when and how to react to specific sanctions more difficult. Instead, it is critical to empower decision makers

with detailed analysis derived from multiple high-level data sources. This analysis, based on the combination of artificial and human intelligence, is key to converting data into presentable facts, enabling port authorities to make confident and timely decisions.

Trying to make sense

Sanctions vary within different jurisdictions in how they prohibit goods from entering or exiting Russia, and this is one area where we as a marine assurance technology specialist are helping ports understand the intricacies they need to consider when making decisions.

From feedback we have received from ports, we know that of particular concern are dual-use goods that can potentially be used for both civilian and military purposes. Taking the time to evaluate items within indi-

vidual shipments can cause delays in ports, but failing to correctly identify when those items are intended for military purposes is a serious offence.

Hydrocarbon shipments face different complications, and we are also responding to concerns on this. It is an easy and established practice for oil from multiple sources to be blended prior to refining, to then be re-labeled to conceal a Russian origin. Shipments can change hands many times before reaching their destination and origins can be further obscured by ship-to-ship transfer operations conducted on the high seas.

A ship's flag can be changed to circumvent sanctions that would otherwise see it denied port entry. Bareboat charters also fall under the scope of sanctions and therefore require examination of flag history, as do large recreational vessels.



ABOUT THE AUTHOR

DOMINIC MCKNIGHT HARDY is the managing director of MIS Marine, which he has led for 13 years. With 17 years' experience in marine assurance technology, he works closely with key players in the maritime industry, such as OCIMF, INTERTANKO, and chartering and vetting organizations worldwide to develop vetting systems and data solutions.

Port operators need to understand that providing such vessels with electricity or water, for example, may be a violation of sanction requirements.

Added to this is the importance of crew welfare and safety – another form of compliance monitoring, this time to adhere to labor convention and welfare regulations – which requires sensitivity and data in equal measure.

These complex aspects of compliance mean that each cargo and each vessel entry should be authorized individually.

Port operators are finding that they need intelligent, detailed analysis to support each decision they make, and this is where marine assurance comes to the fore, providing not just vetting, but also compliance support functions.

Handy helper

The need for data to drill down deeper to look for any Russian links is evident, yet the volume of data continues to increase as sanctions grow.

Automated systems can only do so much to help ports and shipping companies achieve their goals.

By taking data relating to vessel locations, voyage histories, vessel ownership and operation, as well as cargo and crew manifests, our systems support clients in the ever-changing scenarios, allowing them to apply their own human intelligence to the complete risk picture.

To support sanctions compliance in particular, MIS Marine launched Mainstay Core in July, which provides a comprehensive snapshot view of sanction data to support compliance and minimize the risks for ports and terminals.

Through standardized but configurable risk policies, it provides full access to marine assurance data sources, enabling effective and simple screening processes and streamlined third-party communication.

Mainstay Core collects and presents multiple sources of up-to-date industry data such as from the Oil Companies International Marine Forum, the United States Coast Guard, AIS tracking, and, of course, sanctions.

I would therefore argue that marine assurance is more than vetting, it is about understanding a port's complete risk profile.

Those risks come in many forms, from compliance and regulatory failings to indirect business with a sanctioned entity. Through our sanctioned data tracking, we can automatically provide alerts regarding any sanctions and compliance threats.

MIS Marine has invested heavily in the development of advanced marine assur-

ance solutions and has provided support to guide customers through change.

This includes addressing the twin challenges of replacing outdated legacy systems with more technologically advanced solutions that unlock the power of marine data to support due diligence, while avoiding the risk of data overload.

As the industry advances its investment in digital technologies, reaping the

benefits of streamlined operations and superior business intelligence, I think it is important to focus on the key role that marine assurance plays in achieving any corporate goals.

While the shipping industry continues a decade's long improvement in the safety of its assets,

the nature and magnitude of the risks it faces do not stand still.

There continues to be an intense and rapidly changing situation in the Black Sea, and we therefore expect more sanctions to be enacted in the near future.

It is critical that port operators maintain compliance with sanctions regulations, and we stand ready to help alleviate the complexity of this labor-intensive task. ■

“Marine assurance is more than vetting, it is about understanding a port's complete risk profile”

DOMINIC MCKNIGHT HARDY
Managing director, MIS Marine

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QUICK 10



FRANC PIGNA
Managing director,
Aegir Port Property Advisers



N°1

Favorite app?
www.radiooooo.com – music
from any country for any
decade from 1900 to now.



N°2

**Something unexpected that
brings you joy**
Seeing random acts of
kindness between strangers.



N°3

**An item you cannot live
without and why?**
My Swiss army knife to be
ready for almost anything.



N°4

**What world record do you
think you have a shot
at beating?**
Musing endlessly about
esoteric subjects.



N°5

**A quality that impresses you in
a business partner**
Honesty, integrity, and insight.



N°6

**What mythical creature would
you like to believe was real?**
Ægir, Norse god of the sea,
lived on the Isle of Hlésey (see
Number 9), master brewer, and
host of many feasts.



N°7

**If you could time travel,
where would you go and what
would you do?**
McConkey's Ferry Inn, near
Yardley, Pennsylvania, night
of 25 December 1776, to join
general George Washington in
crossing the Delaware River
toward the Battle of Trenton.



N°8

Dream dinner date and why?
With Albert Einstein, to discuss
his opinions on pre-Big Bang
cosmology and nothingness.



N°9

**Three things you take to a
deserted island**
My Swiss army knife (see
Number 3), a magnifying
glass (nix this, there is one
in my Swiss army knife), a
steel mirror, and a fish hook
with line.



N°10

Best advice ever received
Always aspire to follow:
whatever is hateful to you,
do not do to your fellow
human being.



IN COURT DESIGNATION

The ruling that a marina is a dock, which limits its liability for damages, serves as a reminder to ports to check for foreseeable damages

CASE

On the lookout

KATE LAW | LLB, LLM (Soton), senior associate, Campbell Johnston Clark, London

The English Court of Appeal recently handed down its ruling in the case of *Holyhead Marina v Farrer*, regarding the applicability of the entitlement to limit liability under Section 191 (s.191) of the Merchant Shipping Act 1995 (MSA), upholding the decision of the first instance court that a marina falls within the definition of a dock and therefore, Holyhead Marina was entitled to limit its liability.

The case arose out of the destruction caused in March 2018 by Storm Emma in the United Kingdom, which resulted in a number of the pontoons forming the marina becoming detached and damaged, and in turn damaging a number of the vessels moored there.

The owners of the marina anticipated receiving claims from many of the owners of the damaged vessels, which was estimated to reach £5,000,000.

However, if the owners of the marina were entitled to limit their liability under s.191, their liability would be limited at approximately £550,000.

Protecting yourself

S.191 entitles “a harbor authority, a conservancy authority, and the owners of any dock or canal” to limit their liability for claims against them for damage to vessels by “reference to the tonnage of the largest United Kingdom ship which, at the time of the loss or damage is, or within the preceding five years have been, within the area over which the authority or person discharges any functions.” The owners of the marina submitted that they fell within the definition

of a dock under s.191 and therefore were entitled to limit their liability. The largest vessel that had been within the marina in the five years prior to the storm weighed less than 300 gt, so the minimum liability under the Convention on Limitation of Liability for Maritime Claims (the LLMC) of 500,000 units of account would be applicable if the marina was entitled to limit.

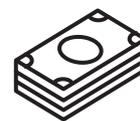
The defendant owners claimed, among other things, that the marina was not a dock within s.191 of the MSA, therefore it was not entitled to limit its liability.

Originally, the Admiralty Court found in favor of the marina, that they were in principle entitled to limit their liability. The vessel owners then appealed to the Court of Appeal.

A matter of definition

S.191 includes within the description of a dock “quays, wharves, piers, stages, landing places, and jetties.” The court held that, although they considered in the natural meaning of a dock this would not include a marina, the floating pontoons could be categorized as “stages, landing places, and jetties,” therefore qualifying as a dock within s.191. The court also deemed the fact that the marina was used by smaller, recreational vessels as opposed to large commercial vessels, did not mean it could not fall within the definitions in s.191. The court did not consider there were any good commercial reasons to exclude marinas from the scope of s.191.

The Court of Appeal accordingly approved the judgment at first instance and found that the marina was, in principle, entitled to limit its liability under s.191. ■



£550,000

The marina was, in principle, entitled to limit its liability under s.191.

EXPERT

Foreseeable consequences

KATE LAW | LLB, LLM (Soton), senior associate, Campbell Johnston Clark, London

Although in this instance, given the nature of the vessels moored at the marina, this resulted in a very low limitation of liability and in the context of larger harbors, ports, and terminals, the applicable limit of liability will be much higher given the larger tonnage of the type of vessels utilizing the port/terminal. This is something to bear in mind if a claim is made for damage to a vessel. It can be particularly helpful if the claim against the port/terminal is potentially very large in value.

The judgment in *Holyhead Marina v Farrer* also demonstrates that the court is likely to take a wide-ranging interpretation regarding the types of structure that may be entitled to limit their liability under Section 191 (s.191) of the Merchant Shipping Act 1995 (MSA).

When facing potential claims for damage to vessels, ports or terminals may have a number of other potential defenses under English law, in addition to the potential to limit their liability under s.191, which they may be able to rely upon to reject or limit such claims – although this will be subject to the specific facts of each case.

First, it is prudent to check any contracts or terms and conditions, which may be applicable between the port/terminal and the shipowner to see if there are any contractual defenses that can be relied upon – for example, there may be time bar provisions, express liability limits, or limits on the type of damages, such as exclusions on

consequential losses within the contracts that the port/terminal can rely upon.

There may also be arguments in respect of causation – there must be a causal link between the alleged breach or negligence of the port/terminal and the loss claimed by the shipowner.

If there is evidence that the ship itself is partly to blame for the damage caused to it, then the port/terminal may also be able to advance a defense of contributory negligence, to reduce the potential claim against it.

If there is evidence that the claimant shipowner failed to reasonably mitigate their loss, this could provide another partial defense to a claim for damages.

Although it will depend upon the basis of the claim being brought against the port or terminal, under English law, the requirements of foreseeability and remoteness of damage apply to both claims in contract and tort – this effectively requires that the loss claimed by the shipowner must be a foreseeable consequence of the port/terminal's alleged breach or negligence.

It is also worth considering whether it is possible to claim an indemnity from a third party for any claims made against the port/terminal – for example, where there is a claim for damage to a ship brought against a port/terminal, which results from the negligence of a pilot employed or appointed by the port/terminal, then a recourse action against the pilot should be considered. ■

"Requirements of foreseeability and remoteness of damage apply to both claims in contract and tort"

T

o better understand the state of shipwrecks and the general marine history in the United Kingdom, conservation body Historic England has launched a campaign titled Unpath'd Waters.

"The UK Marine Area extends over some 867,400 km², equivalent to three and a half times the terrestrial land surface. It encompasses submerged prehistoric landscapes, inundated monuments and settlements, wrecks and aircraft losses, maritime industrial and military complexes, coastal and intertidal archaeology, seaside resorts, ports, and dockyards. The public already engages with this heritage and there's huge potential to address key research themes," the project website stated.

One project therefore aims to look at connecting existing data sets from different researchers. "Over the last 100 years, archaeologists, museums, heritage professionals, and members of the public have generated vast amounts of data. This spans the period from paper records, to early use of digital records to current born digital approaches. This means we have built an archive of data in different formats, working on different systems, which aren't always very accessible," the project description read.

Abi Morris, Unpath'd Waters programme manager said to P&H that the project would "welcome a discussion with the IAPH about the kinds of datasets that they use, which are not specifically about heritage but which may intersect with heritage, in the course of their normal activities."

For ports, the new data could be useful to "improve the quality of heritage information available for planning in relation to the redevelopment of ports," Morris said.

Currently, "A lack of high-quality geophysical data and limited research mean our maritime heritage remains poorly understood. Thousands of shipwrecks around the UK coastline have been identified incorrectly or remain unknown," another project description read.

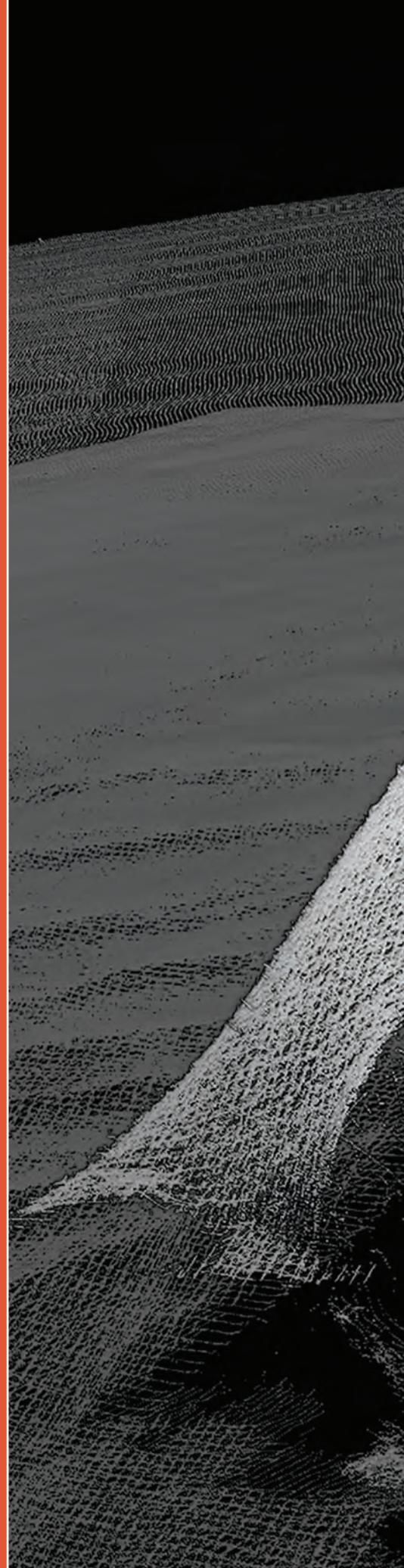
In the Irish Sea, shipwrecks are being identified and cataloged. "We've completed our initial processing and analysis of the multibeam sonar data and reviewed which vessels have been lost in survey area. We can now work out which vessels could be identified. Several other notable losses in this region of the Irish Sea have been attributed to *U-96*, including the passenger vessel *SS Apapa*, the oil tanker *SS Derbent*, and cargo vessel *SS Conargo*. All of these have already been located and identified off the north coast of Anglesey."

Overall, the project therefore hopes to make historic maritime data more accessible and uncover the stories behind it. ■

Get involved:

 www.unpathdwaters.org.uk

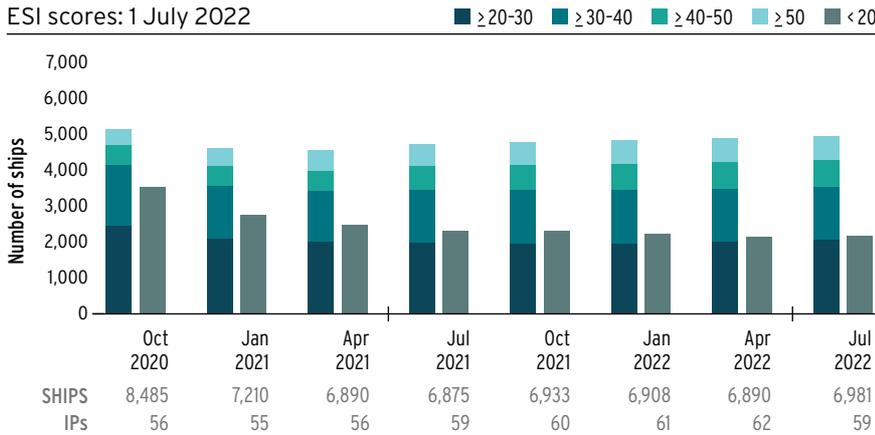
Uncovering history





CREATIVE SIDE UNPATH'D WATERS

ESI scores: 1 July 2022



Note: Stacked bars show ESI scores above 20 points, single bar shows ESI score below 20 points

Source: IAPH | © 2022 by S&P Global Market Intelligence

Index updated

As of 6 July, 981 vessels have been registered with the Environmental Ship Index (ESI). Compared with the update from April, nine fewer vessels are now registered.

Most of the newly added ships score high between 20 and 30 points. Vessels that score above 20 points have been visualized. With 4,855 vessels, this makes up most of them.

The ESI identifies seagoing ships that perform better in reducing air emissions than required by the current emission standards of the IMO. Read more in the Q&A on the following page. ■

Membership notes

We are pleased to welcome the following new regular and associate members to the association:

Regular members

SEMOP Port-la Nouvelle SA

- 📍 France
- ☎ +33 4 68 48 01 56
- ✉ yann.wickers@pln-port.com
- 🌐 www.port-la-nouvelle.com
- 👤 Yann Wickers, CEO

Port Autonome de Cotonou

- 📍 Benin
- ☎ +229 21 31 21 93
- ✉ Kristof.VanDenBranden@pac.bj
- 🌐 www.portcotonou.com
- 👤 Joris Thys, general manager

Associate members

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- ✉ steven.mackay@ssglegal.com.au
- 👤 Steven Mackay, lawyer

CrimsonLogic

- 📍 Singapore
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- ✉ filzashaminba@globaletrade.services
- 🌐 www.crimsonlogic.com
- 👤 Chong Kok Keong, assistant CEO

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- 📍 Canada
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- 🌐 www.gsts.ca
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- 🌐 www.bmt.org
- 👤 Subajan Sivandran, managing director

Kale Logistics Solutions

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- ✉ Rajni.patwardhan@kalelogistics.com
- 🌐 www.kalelogistics.com
- 👤 Vineet Malhotra, co-founder

Fondazione Accademia Italiana della Marina Mercantile

- 📍 Italy
- ☎ +39 010 3622472
- ✉ biole@faimm.it
- 🌐 www.accademiamarinamercantile.it
- 👤 Paola Vidotto, general manager

EVENTS TIMELINE 2022

12

OCTOBER

IAPH Risk and Resilience Committee
Virtual meeting:
4-6 pm CEST
🌐 www.iaphworldports.org

18

OCTOBER (18-20)

GreenPort Congress & Cruise
Cruise-centric conference, Bruges, Belgium
🌐 www.portstrategy.com/greenport-cruise-and-congress

2

NOVEMBER (2-11)

IMO MSC 106
Maritime safety committee meeting held in London, UK
🌐 www.imo.org



Keita Shinohara, certification manager at the Green Award Foundation, discusses the ins and outs of handling the certification of the Environmental Ship Index

Q&A

KEITA SHINOHARA
Certification manager, Green Award Foundation

Q: What is the purpose of the ESI and the role of the Green Award Foundation?

A: The Environmental Ship Index (ESI) is a voluntary ship index designed and used by port authorities and maritime administrations to incentivize shipowners, operators, and managers to improve the ship's environmental performance. The two environmental modules are ESI Air and ESI Noise. The ESI Air score evaluates the amount of nitrogen oxide and sulfur oxide released by a ship and includes a reporting scheme on their energy efficiency to monitor their potential reduction on carbon dioxide emission. The ESI Noise score evaluates how much noise pollution a seagoing ship has mitigated based on the noise measurement guideline of the Neptunes protocol. Since 2021, the Green Award Foundation has been implementing daily ESI operations. This includes correspondences with shipping companies and ports, executing onboard verifications, and arranging ESI-related meetings. Green Award – via its certification program – audits shipping companies and their ships that go beyond industry standards in terms of safety, quality, and environmental performance.

Q: What is the benefit of having an ESI verification on board?

A: These verifications ensure that the static and operational data that the ESI scores are based on are correct and verified. Within our team, there is one designated ESI verifier while five of Green Award's auditing team can also perform onboard verifications. In 2021, 400 onboard verifications took place.

Q: What is the process of onboard verification like?

A: Within the ESI administration office, a smart-targeting approach to select ships to undergo onboard verifications is carried out. Then, captains on board are notified of the verifier attending the ship one or two days prior. Onboard crew is asked to provide the data the verifier requests and to upload the ship data to the ESI system. The verification takes one-

and-a-half to two hours. Results are returned to the ESI office, where verifications are made to assess the results. If the data uploaded are found to be inconsistent, we will notify the ship operator, in which case the ship's ESI score can be revoked.

Q: How can the IAPH membership and committees make use of the data you collect through the ESI?

A: It is important to note that all data shared with ESI abide by the ESI Terms of Use data confidentiality clause. On a second note, one of the most critical aspects is to ensure that the submitted data are indeed accurate. The ESI Board and ESI Advisory Groups, which are part of the ESI governance structure, utilize these anonymized ship data – such as ship engine data, sulfur content of fuel, energy efficiency data – for the purpose of further improvements to the ESI program. The IAPH Cruise Committee is currently developing an at-berth module that could be incorporated into the ESI.

Q: What motivation is there for shipowners and ports to participate in the ESI and the Green Award Foundation?

A: The availability of incentives naturally drives the ship operators to participate. ESI and Green Award are used to showcase their initiative to be ahead of the game. Both programs target performance beyond international regulations; ESI has a strong presence of ships addressing air emissions problems, while Green Award emphasizes on other sustainability topics, such as water pollution, waste handling, condition of the ship, safety onboard, and crew welfare such as health protection or fatigue. Many ports participate in both programs by becoming incentive providers and granting discounts to ports dues. The ports use both initiatives to address sustainability in shipping.

Q: What are the future plans for the ESI and Green Award?

A: The ESI Advisory Group is working on a revision of the present ESI program incorporating air emission-reducing techniques. Also, the at-berth module is one of the additional features under development that might be of added value for ports to get an insight on certain air emissions from ship operations in their port. From a Green Award perspective, we work on enhancing our smart-targeting techniques to improve geographical verification coverage. At the same time, our Green Award auditors undergo additional peer-to-peer training with our designated ESI verifier to continuously improve on an equal verification process, which is important for the participating ports and shipping companies. ■

3

NOVEMBER

IAPH Data Collaboration Committee

Virtual meeting:
12-2 pm CEST
 www.iaphworldports.org

10

NOVEMBER

IAPH Climate and Energy Committee

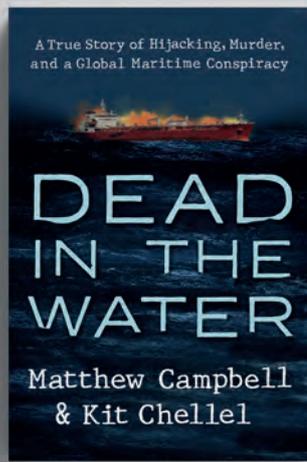
Virtual meeting:
4-6 pm CEST
 www.iaphworldports.org

12

DECEMBER (12-16)

IMO MEPC 79

Environmental discussions held at the
UN maritime body in London, UK
 www.imo.org



ABOUT THE AUTHORS



MATTHEW CAMPBELL is an award-winning reporter and editor for the *Bloomberg Businessweek* magazine, covering major stories, including crime, terrorism, climate change, and public health, across the Asia Pacific region.

THE REVIEW

Dead in the Water

PATRICK VERHOEVEN



There are plenty of books that tell exciting stories about shipping. Usually they are set in history with tales of naval battles, adventurous explorations, and piracy attacks topping the list. Page-turners that also provide insight in the present-day complexities of commercial shipping are a much rarer find.

Written by award-winning Bloomberg reporters Matthew Campbell and Kit Chellel, *Dead in the Water* unravels the story of oil tanker *Brillante Virtuoso* that was the subject of a fake piracy hijacking in the Gulf of Aden in 2011, which damaged the vessel to a point that it was ready for the scrapyard. The authors revealed how the scene was staged by its Greek owner as part of an attempted insurance fraud, involving the ship's captain and chief engineer, as well as the salvage company that appeared miraculously fast at the place of disaster.

This is a compelling story as such, but the tale of *Brillante Virtuoso* also includes murder. David Mockett, a Yemen-based British surveyor who was brought on the case by the insurers at Lloyd's of London, was skeptical of the alleged piracy attack. Soon after his inspection, he was killed by a bomb planted under his car outside his office in Aden, Yemen, a place where human life is cheap.

Eight years after the incident, London's High Court identified the owner of the ship – nicknamed Super Mario – as the principal orchestrator of what the authors refer to as “one of history's most audacious maritime frauds”.

However, he was never convicted. He was no longer party to the claim, as his bank had taken his place.

The criminal investigation into the murder of Mockett was never resolved, although Campbell's and Chellel's meticulous research left little doubt as to whom was behind the killing.

Dead in the Water does not paint a pretty picture of the maritime industry and people who complain that shipping only reaches the news when something goes wrong will be disappointed again.

What I found truly shocking is not just that the man who orchestrated the insurance fraud of *Brillante Virtuoso* – and possibly commissioned murder – has been able to escape justice so far, but also that two months after the High Court's verdict, he was happily receiving an award at the Lloyd's List Greek Shipping Awards.

Consequently, to improve the image of shipping, we should perhaps start with more due diligence about the industry figures we are collectively celebrating. ■



KIT CHELLEL is a Bloomberg reporter and a writer for the *Bloomberg Businessweek* magazine. He has won numerous international prizes for his work, covering everything from mainland Chinese state hackers and feuding hedge funds to shady Nigerian oil deals.



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