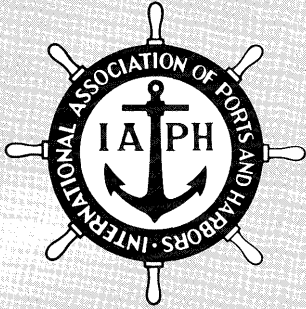


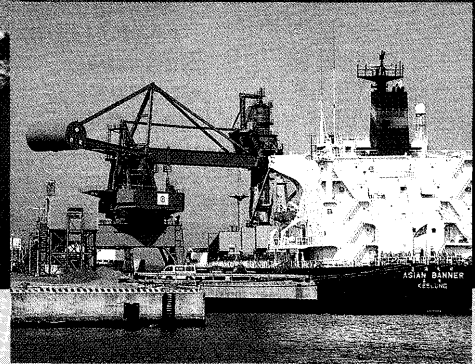
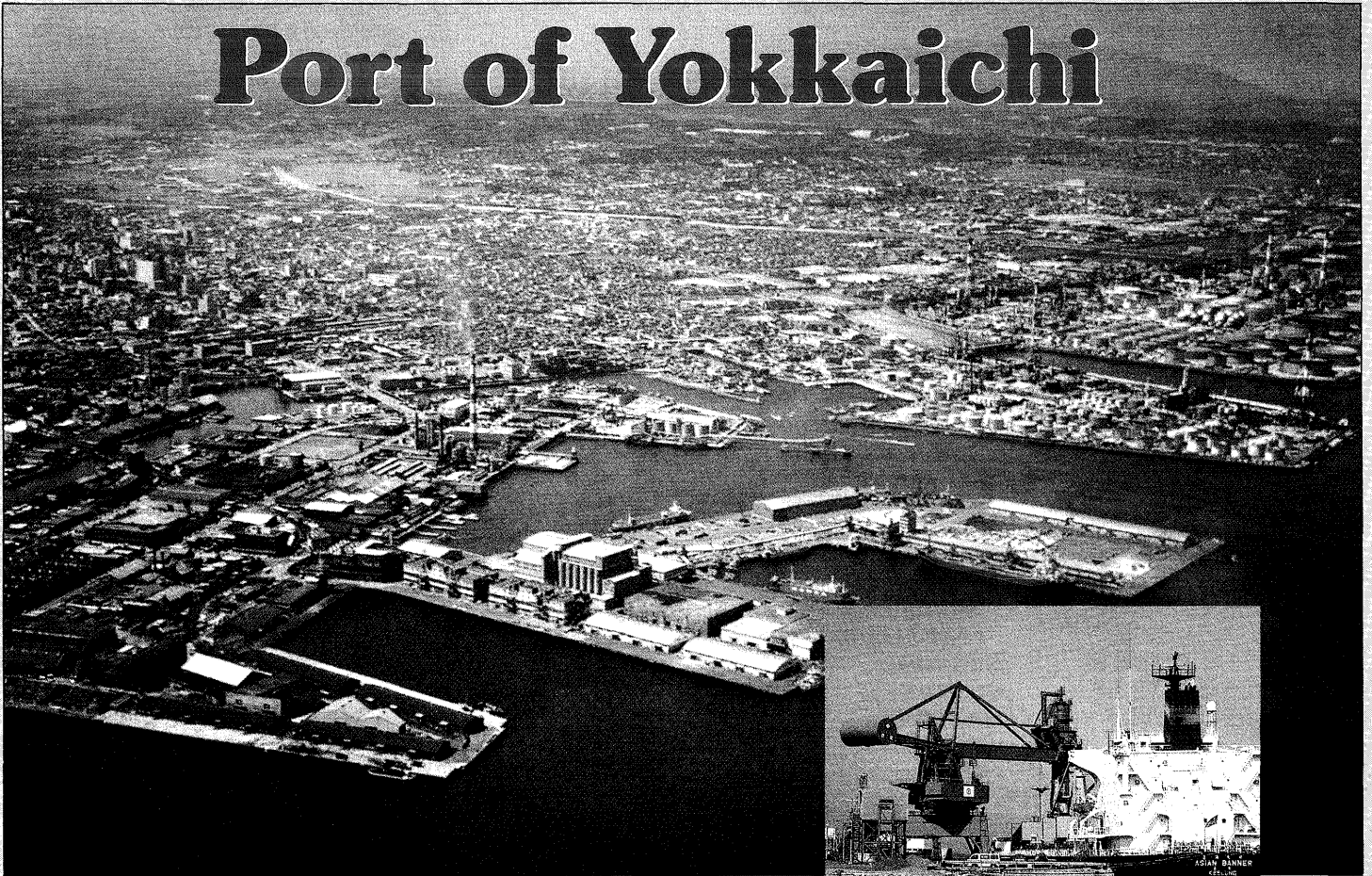
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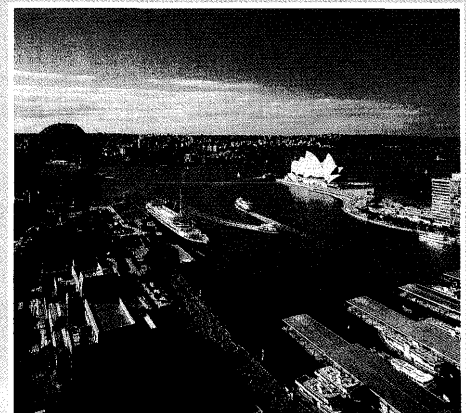
April
1993 Vol. 38 No. **3**



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Ports & Harbors
April, 1993
Vol. 38
No. 3

Ports & Harbors

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SINGAPORE PORT INSTITUTE

The Singapore Port Institute (SPI), the training arm of the Port of Singapore Authority (PSA), has trained more than 3000 personnel from 55 countries through its courses. For 1993, SPI will be offering the following courses for managerial, operations and technical personnel from the shipping and port-related industries:

Course	Dates	Duration	Fees(S\$)
Management of a Warehousing & Distribution Centre	10 May – 14 May	1 week	\$1100
Prevention of Marine Pollution from Ships-MARPOL 73/78	28 Jun – 2 Jul	1 week	\$1100
Management of Container Operations	5 Jul – 16 Jul	2 weeks	\$1950
Implementing QC Activities in the Port	19 Jul – 23 Jul	1 week	\$1100
Management & Operations of a Break-Bulk Terminal	26 Jul – 6 Aug	2 weeks	\$1950
Diploma in Marine Operations & Administration	30 Aug – 8 Jan	5 weeks	\$5200
Oil, Chemical and Gas Tanker Safety	6 Sep – 17 Sep	2 weeks	\$1950
Port Engineering	6 Sep – 24 Sep	3 weeks	\$2750
Marine Fire & Oil Spill Control	27 Sep – 8 Oct	2 weeks	\$1950
Management of Port Security	4 Oct – 15 Oct	2 weeks	\$1950
Port Finance for Non-Financial Managers	11 Oct – 15 Oct	1 week	\$1100
The Shipping Business	1 Nov – 12 Nov	2 weeks	\$1950
Strategic Planning Seminar for Shipping Managers	10 Nov – 19 Nov	8 days	\$1600
Container Ship Stowage Planning	15 Nov – 26 Nov	2 weeks	\$1950
Handling, Storage & Transportation of Dangerous Goods	22 Nov – 3 Dec	2 weeks	\$1950

For course details and application forms, please contact us at Singapore Port Institute; Telex PSATRG RS28676; Telephone (65)321-1825/321-1826; Telefax (65) 274-0721.

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Each module will be taught through intensive one-week lectures with intervening periods of self-study. Examinations will be held at the end of each module.

ELIGIBILITY

Applicants with a minimum of 5 GCE "O" levels or equivalent qualifications may register for admission into the Programme. Working experience in the maritime industry will be an advantage.

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Participants who successfully complete the required course of study and who pass the end-of-module examinations in accordance with the standards set by the Maine Maritime Academy will be awarded a Diploma jointly issued by the Singapore Port Institute and the Maine Maritime Academy.

FEE

S\$5,200 per participant

CLOSING DATE OF APPLICATION

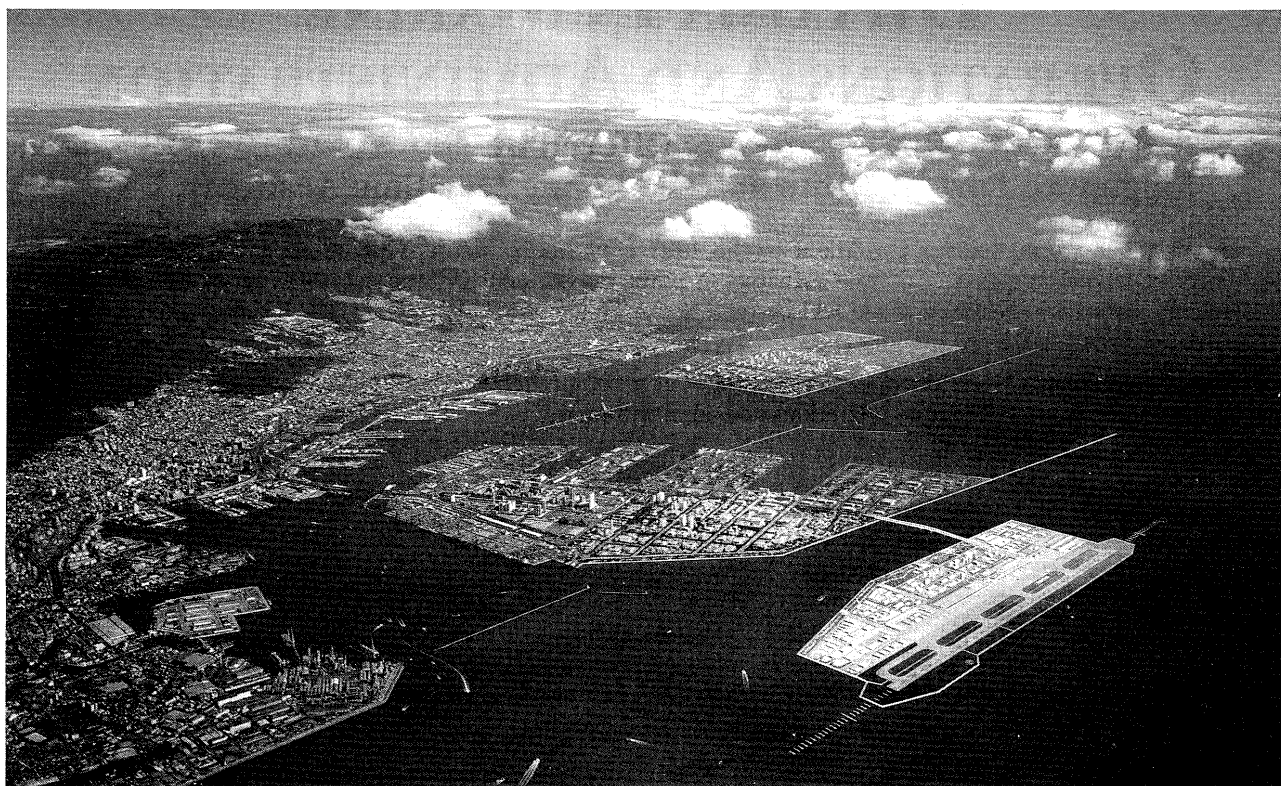
5 June 1993

ENQUIRIES

Tel: (65) 321-1107/1827, International Fax: (65) 274-0721, Telex: RS 28676; or write to:
The Training Manager, Singapore Port Institute, 2 Maritime Square, Telok Blangah Road, Singapore 0409, Singapore.

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IAPH ANNOUNCEMENTS AND NEWS

Sydney Conference

Introducing Keynote Speakers

The Business Sessions of the Sydney Conference will begin with the Keynote Session scheduled for 09:00 — 10:00, Monday, April 19 on the conference theme: "Ports — The Impact of Global Economic Change". The keynote speakers chosen by our hosts are Mr. Guy Pfeffermann and Mr. Campbell McCheyne Anderson, whose profiles are introduced below based on the information provided by the Organizing Committee.

Guy Pfeffermann

Born in France in 1941. Graduated from the University of Paris with a Bachelor of Law and Economics degree, 1962; Besse scholar at St. Antony's College, Oxford (1962-65); B. Litt. (Oxon.), 1967 ("Industrial labor in Senegal").

His career at the World Bank includes:

Young Professional, 1966-68; Country economist on Mexico, Haiti, Trinidad, Dominican Republic, etc., in the Western Hemisphere Department, 1969-72; Front-office senior economist (Mexico — World Bank's first "basic report" — Chile, Ecuador) 1973-79; Chief Economist, Latin America and Caribbean Region 1979-87; Chief, Debt and Macroeconomic Adjustment Division 1987-88; Director, Economics Department and Economic Adviser of the Corporation, IFC, 1988.



Guy Pfeffermann

His recent publications include:

Trends in Private Investment in Developing Countries (1992 edition) with Andrea Madarassy (IFC Discussion Paper Number 16, January 1993)

Facilitating Foreign Investment — some dos and don'ts (Finance and Developments, March 1992)

"Poverty Alleviation" in "Politics and Policy Making in Developing Countries — Perspectives on the New Political Economy" edited by Gerald M. Meter International Center for Economic Growth, ICS Press, San Francisco (1991)

"Trends in Private Investment in Thirty Developing Countries with Andrea Madarassy (IFC Discussion

Paper Number 6, World Bank, 1989)
Nutrition and Health Programs in Latin America (with Chalmers C. Criffin, World Bank publication 1989)
Poverty in Latin America — The Impact of Depression (World Bank Publication 1986)
Latin American and the Caribbean: Economic Performance and Policies (World Bank Reprint, 1983)

His recent speeches include:

No Place to Hide — Toward a More Competitive Global Marketplace. Harvard Business School Alumni Association, Bombay, December 1991

Striving for Competitiveness — Can Government Help? Labour University Management School, October 1992

Privatisation, Next Stage of Structural Adjustment, La. Paz, Bolivia, December 1992

Campbell Anderson

He was educated at The Armidale School and then went on to graduate from the University of Sydney with a Bachelor of Economics degree. He is also a Member of the Australian Society of Certified Practising Accountants.

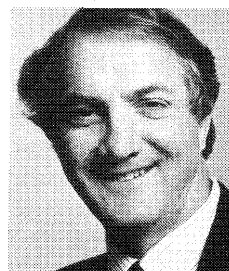
After leaving university, Mr. Anderson joined Boral Limited as a graduate trainee, eventually working in the area of corporate acquisitions.

In 1969 he left Boral to become the first General Manager of Reef Oil NL. This company was subject to a partial takeover by Burmah Oil in 1971, following which Mr. Anderson became Managing Director of Reef Oil and also its associated company, Basin Oil. In 1971 he joined Burmah Oil as Assistant Chief Representative responsible for the various interests in the Cooper Basin. From 1973 Mr. Anderson worked overseas in the USA and UK in various positions within the Burmah Oil Group, becoming Group Managing Director in 1982. Mr. Anderson resigned from Burmah Oil in 1985 to return to Australia and take up the position of Managing Director of Renison Goldfields Consolidated Limited.

On 1st January, 1986 Mr. Anderson assumed the role of Managing Director and Chief Executive of Renison Goldfields Consolidated Limited.

Mr. Anderson is Chairman of Ampolex Limited, President of the Australian Mining Industry Council and a Director of the Business Council of Australia, the Australian Mines and Metals Association and the World Gold Council.

Mr. Anderson's leisure interests include golf, shooting, horse-racing and swimming.



Campbell Anderson

THE 18TH WORLD PORTS CONFERENCE OF IAPH SYDNEY, AUSTRALIA

at the Sydney Hilton Hotel

Business and Social Programs

Friday, 16 April 1993

Afternoon Courtesy Call to the Dignitaries by the IAPH Officers

Saturday, 17 April 1993

0900/1000 Membership Committee (chair: Lunetta)
0900/1000 Constitution & By-Laws Committee plus Legal Counselors (chair: Falvey)
0900/1015 COPSSEC FULL MEETING (chair: Smagghe)
0915/1200 Marine Safety Sub-Committee (chair: Watson)
Port Planning Sub-Committee (chair: Fraenkel)
1000/1200 Working Group on Intermodal Trends (inaugural) (chair: Wennergren)
1400/1500 Cargo Handling Operations (chair: Cooper)
1400/1500 Trade Facilitation (chair: Jeffery)
1400/1500 CLPPI (chair: Valls)
1400/1500 CIPD (chair: Goon)
1500/1700 Port Safety and Environment Sub-Committee (chair: van der Kluit)
Sea Trade Sub-Committee (chair: Liburdi)
Ship Sub-Committee (chair: Moulod)
Dredging Task Force (chair: Lee)
1600/1700 PACOM (chair: Taddeo)
1730/1800 Nominating Committee (the chairman and members to be appointed by the Board.)
1830/2000 *Cocktail reception for early arrivals*

Sunday, 18 April 1993

0800/0830 Resolutions and Bills Committee (1st)
0830/0900 Credentials Committee (the chairman and members to be appointed by the President from among the participants)
0900/1000 Finance/Budget (chair: Don Welch)
0900/1200 FULL COPSSEC (chair: Smagghe)
1300/1500 Pre-Conference Joint Meeting of Board and Exco
1630/1830 Opening Ceremony — Sydney Opera House
1830/2200 *Welcome Reception hosted by IAPH followed by Cruise Dinner, Sydney Harbour*

Monday, 19 April 1993

0800/0830 Resolutions and Bills Committee (2nd)
0900/1000 Keynote Speeches on the Conference Theme: "Ports — The Impact of Global Economic Change"
1015/1215 First Plenary Session
1400/1700 Working Session No. 1: Ports and World Trade
1830/1945 *Cocktails — Australian National Maritime Museum*

Tuesday, 20 April 1993

0800/0900 Honorary Membership Committee (the chairman and members to be appointed by the President from among the participants)

0900/1200 Working Session No. 2: Ports in the '90s - Management and Financing

1400/1700 Working Session No. 3: Ports and Trade Facilitation

1930/2230 *Australian evening — Argyle Tavern, "The Rocks"*

Wednesday, 21 April 1993

Full day Technical visit to the Port of New Castle and (0800/1900) Kooragang Coal Terminal

Evening Free

Thursday, 22 April 1993

0900/1200 Working Session No. 4: Bulk Loading Ports — The Australian Scene

1400/1700 Working Session No. 5: Ports and the Environment

Evening Free

Friday, 23 April 1993

0800/0830 Resolutions and Bills Committee (3rd)

0900/1200 Working Session No. 6: Ports and Human Resources

1400/1600 Second Plenary Session and the Closing Ceremony

1600/1700 Post-Conference Joint Meeting of the Board and Exco

1730/1800 Post-Conference Meeting of the Exco

1930/2400 *Gala Dinner & Dance — Sydney Overseas Passenger Terminal*

* * * * *

Note:

Lunch will be served in the TRADE EXHIBITION area situated on Level 9 of the Sydney Hilton Hotel on Monday, Tuesday, Thursday and Friday, while Wednesday's technical tour includes lunch at Hunter Valley after visiting the Kooragang Coal Terminal.

Abbreviations:

CHO (CHOC): Committee on Cargo Handling Operations
CIPD (IPD): Committee on International Port Development
CLPPI: Committee on Legal Protection of Port Interests
COPSSEC: Committee on Port & Ship Safety, Environment and Construction
EXCO: Executive Committee
PACOM: Public Affairs Committee
TF: Trade Facilitation

Registrants as of 28 February

According to the Organizing Committee, by 28 February 1993, or the deadline for application at the normal registration fees, a total of 317 people (not counting 161 accompanying persons) had completed their registrations. Although the registration fees after 28 February will increase to AS1,500 for IAPH members and AS2,450 for non-IAPH members, the Organizing Committee will do its best to accept latecoming applications from those who are yet to register, as has been the case with previous conferences. If you have not yet completed your application, please expedite it through the Conference Secretariat at the following address.

The Conference Secretariat
MSB/IAPH World Ports Conference
GPO Box 2609
Sydney NSW 2001, Australia
Telephone: (61 2) 241 1478
(61 2) 247 6940
(61 2) 251 3552

Accommodation

The Conference Secretariat will be pleased to make accommodation bookings on your behalf. Rates quoted below are per room per night regardless of single or twin occupancy. They are for room only and do not include breakfast.

Hotel	Rate per per Night	Room Deposit Required
Sydney Hilton Hotel (Conference hotel)	AS165	AS165
Hyde Park Plaza	AS135	AS135
All Seasons Park Regis	AS95	AS95
Waldorf Apartments		
— One Bedroom	AS145	AS145
— Two Bedroom	AS165	AS165
(A deposit (for one night) must be paid to confirm your reservation.)		

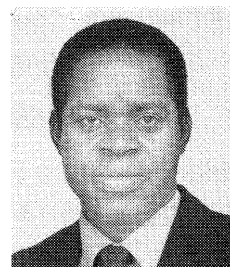
Note for payment of registration fees and hotel deposits:
Payment of fees must accompany all registration forms.
No reservations will be confirmed until payment is received. Payment can be made either by:
Bank draft in Australian Dollars
Personal check (Australian registrants only)
Cheques should be made payable to "MSB/IAPH World Ports Conference".
Please do not pay your fees by direct bank transfer.

Mr. Mumba of Kenya To Serve on Exco

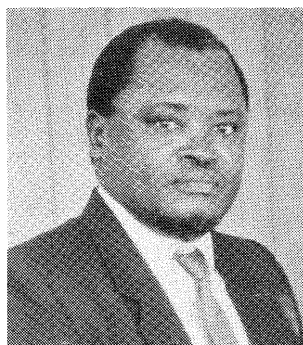
President John Mather has appointed Mr. Albert C. Mumba, the new Managing Director of Kenya Ports Authority, to serve on the IAPH Executive Committee to fill

the vacancy created by Eng. P.O. Okundi, who has been transferred from the Ports Authority. Mr. Mumba's appointment has been supported by Mr. Jean Smagghe, 3rd Vice-President of IAPH representing the Africa/Europe region.

According to the information received from the KPA's Marketing & Public Relations Manager Alex Kabuga, Mr. Mumba is a long serving officer of the KPA and is well versed in shipping and port operations matters. Mr. Mumba has also been appointed as IAPH Liaison Officer with UNEP. Mr. Mumba has expressed his willingness to serve on the Executive Committee as another member representing the African region along with Mr. Moulod, Port of Abidjan.



P.O. Okundi



A profile of Mr. Albert C. Mumba

(provided by the Kenya Ports Authority)

Mr. Albert Chaurembo Mumba has been appointed the new managing Director of the Kenya Ports Authority (KPA). Before his appointment Mr. Mumba was the KPA's Personnel & Administration Manager.

Mr. Mumba first joined KPA in 1978 as a Principal Planning Officer in the Corporate Development Department, after having worked with the then East African Railways Corporation from 1972. He was promoted in 1989 to take over as the Head of the Corporate Development Department. In 1992, Mr. Mumba earned yet another promotion to become the Head of the Personnel & Administration Division, a position he held until his appointment as the Chief Executive of KPA on January 28, 1993.

Mr. Mumba has taken over the top job in KPA from Eng. P.O. Okundi, who had occupied this position since September 1984. Eng. Okundi has been transferred to become the Managing Director of Kenya Broadcasting Corporation.

Born in 1941, Mr. Mumba holds a Bachelor of Economics degree from the Xavier's College of Calcutta University (1965) and a Master's degree in Maritime Affairs (M. Sc. Maritime Studies) which he obtained from the University of Wales Institute of Science and Technology (Cardiff) in 1984.

The new KPA Chief has accomplished many other courses related to railways and port operations, in particular, and management in general.

Mr. Mumba holds membership in various professional and other bodies including Fellow of Economics Development Institute (World Bank) and Member of the Chartered Institute of Transport (U.K.).

IAPH Africa / Europe Regional Officials Meet in Paris

Report by José Perrot Port of Le Havre

An unofficial meeting of the IAPH African/European Region's members was held at the offices of UPACCIM (Union of Autonomous Ports & Industrial & Maritime Chambers of Commerce—The Association of French Ports) in Paris on 28 and 29 January 1993 at the initiative of Mr. Jean Smagghe, 3rd Vice-President of IAPH from the Port of Le Havre.

The meeting was attended by 20 members as listed below. The meeting was presided over by Mr. Smagghe and the discussion took place in accordance with the following agenda.

Participants:

- J. Mather (President of IAPH—Clydeport Ltd.)
- J. Smagghe (3rd Vice-President of IAPH—Port of Le Havre)
- R. Kondoh (IAPH Head Office—Tokyo)
- A. Smith (IAPH European Representative—London)
- J.M. Moulod (Port of Abidjan)
- F. Palao (Madrid)
- E. Bruyninckx (Port of Antwerp)
- P. Struijs (Port of Rotterdam)
- P. Valls (Chairman of CLPPI—Bordeaux)
- G. Wennergren (Port of Gothenburg) (28th January)
- D. Behrendt (Port of Hamburg)
- A.J. Rodorigues (Port of Lisbon)
- N. Shanley (Port of Dublin) (29th January)
- D. Jeffery (Port of London)
- J. Watson (Port of Dundee)
- M.J. Hoor (Port of Limerick)
- G. van den Heuvel (Port of Amsterdam)
- J. Wallace (18th Conference Coordinator, Sydney)
- N. Diop (Port of Dakar)
- J. Perrot (Port of Le Havre)

Agenda

1. Welcome by J. Smagghe
2. Introduction by J. Mather
3. General Policy of IAPH
 - the means and the goals
 - presentation of the reorganization of the technical committees
 - relations with the other international organizations
4. Role of IAPH in the Region
 - membership
 - involvement of the ports of the Region in IAPH activities
 - IAPH-EC relations
 - IAPH Representation
5. Preparation of the 18th Conference in Sydney
6. Mid-Term meetings of Exco/Committees (1994) and the 20th Conference in Europe (1997)

Day One: 10:00 am, January 28, 1993

J. Smagghe opened the meeting at 10.00 am and welcomed the participants, especially those coming from distant countries. He congratulated Mr. John Mather personally and on behalf of all members present for the

award of Commander of the British Empire that he had received from Her Majesty Queen Elizabeth.

General Policy

The means and the goals

G. Wennergren, Member of the Financial Committee, raised a question as to the possible financial support from IAPH for such Committee members, who are no longer belong to a port. Mr. Valls, Chairman of the CLPPI, commented that he has been facing the similar difficulties concerning overseas travel costs as he is no longer a Port Manager. Mr. Smagghe reminded the meeting that, according to IAPH principles, the respective ports should bear the costs of their representatives who participate in IAPH activities and meetings. Mr. Smagghe also referred to the special budget items known as "Technical Committee Support Fund" which should be used in exceptional circumstances, such as cases where financial assistance for the service of experts in a few specific fields is proposed by the Committee Chairman and approved by Exco. Mr. Smagghe concluded that flexible solutions would have to be found within the member ports or countries themselves before asking IAPH to disburse the Association's money which will be made available to the applicants only after Exco and the Finance Committee Chairman approve the expenses from the IAPH budget.

Reorganization of the Technical Committees

There was felt to be a need for reorganization to cope with new port demand in view of the fact that the organization of the existing six Technical Committees dates back to a time when there was a great number of port construction works, but that today the scope of the committees does not sufficiently cover the fields of economic trends, trade or port-city relations. The meeting reviewed the new set-ups (as illustrated in the chart on page 10) to be proposed to the Board at the Sydney Conference.

The view was also expressed that the main point of the meeting was how to keep good coordination among all the committees and to establish how each committee will work under the new organization.

Relations with other International Organizations

D. Jeffery reported on the activities of his working group set up in order to respond quickly to IMO initiatives with Alex Smith's assistance as Liaison Officer. After the first meeting in December, the impression was that things were not moving very fast but it appeared that IAPH had to be cautious about certain matters which may proceed somewhat faster than advised by the IMO Port Interface Working Group. IMO is still considered as the prime body involved in maritime safety and the environment. Consequently, IAPH should work very closely with IMO in order to apply its knowledge and points of view on these matters. Developing countries should also be able to share these views. However, the members are the states and IAPH, like other NGOs, is only accepted as an observer. Ports are informed of IMO's work to varying degrees, according to the countries; the point is for IAPH to analyse the various reports drawn up by A. Smith, and D. Jeffery would appreciate A. Smith indicating the urgent matters requiring immediate attention.

Role of IAPH in the Region

IAPH relations with EC

J. Smagghe presented a new Association called "the



European Community Seaport Organization,” whose statutes have just been adopted (under Belgian law). It was reported that Mr. Suykens is President, the two Vice-Presidents are Mr. Jeffery and Mr. Palao, and Mrs. Le Garrec is Secretary General. The office will be set up in Brussels. The objectives of the organization shall be “to promote policies and viewpoints of the Community Ports with the European Community Authorities and other relevant international bodies and consequently to study all problems relating to the port industry in the context of the treaties establishing the European Community, so as to keep its members informed and to seek, where possible, common positions. Thus it will make proposals to the European Commission and the DG7 Maritime Division headed by Mr. Blonk.

Mr. Jeffery gave the historical background of the organization by mentioning that it came from the European Ports Working Group, which was an Ad Hoc Group of experts from the port industry set up about 24 years ago to provide an interface with the European Commission. However, the grouping of ports and those representing ports have not been able to determine policy among themselves before the Commission becomes involved and the structure is not suitable for establishing responsibilities. This organization will provide a permanent representative in Brussels in order to respond very quickly to the matters which go on there.

The purpose is to get three delegates from each of the member states of the European Commission. Each member state will subscribe the same amount of money and those who have observer status currently, who are prospective members of the European Commission, will subscribe one third of the fees.

Concerning international relations, a short report was made about the 20th anniversary of the Port Management Association of Western and Central Africa, which took place in October 1992 in Abidjan under the patronage of the Ministry of Cote d'Ivoire. Mr. Moulod, being one of the leaders of this Association which has a membership of 25 ports, gave a boost to the relations between European and African ports. In his capacity as EXPO member and IAPH Vice-President, Mr. Smagghe will act as Liaison Officer between the two associations.

About Europe, the “white book” on future policy in Europe was mentioned. As a first step, a green book was drafted in which the Commission was promoting short-sea shipping as an alternative to land transport. There are ideas about environmental questions but they do not take into account recent sea disasters. As the next step, the “white book” has been sent to the Member States as it represents the opinion of the Commission and the Commission is now waiting for action from the Member States to present a proposal to the Council for a programme for a Common

European Community Transport policy. Mr. Behrendt recommended that members get in touch with their governments in order to get the paper and read it. G. Wennergren mentioned the main topics of this action programme:

- 1) Development and integration of Community transport systems (intermodal systems)
- 2) Safety in transport
- 3) Environment protection
- 4) Social protection
- 5) External relations

It was then pointed out that the item about social protection was a bit worrying for a few ports as industrial roles are always very difficult and can raise difficulties—for example, for tidal ports (special working hours, etc). Thus, this document should be read carefully.

Day Two: 10:00 am, January 29, 1993 The 18th Conference in Sydney

J. Smagghe gave the floor to J. Wallace, who outlined the Conference programs and referred to the keynote addresses, one by Mr. Guy Pfeffermann, the Director of the Economic Department of the International Finance Cooperation (World Bank private sector) and the other by Mr. Campbell Anderson, the Managing Director and Chief Executive Officer of Renison Golffields Consolidated Ltd. (a multinational company). Mr. Pfeffermann's subject will be the likely world economic trends and social changes likely to occur in the '90s as well as the effects they will have on trade, especially the transition in Eastern Europe to a market economy and the effects of the projected reduction of world trade barriers, especially for the U.S., the E.C. and Japan, and the development or reduction in the capital income of developing countries like those in East Asia, which may affect trade, and then the projected growth of major industrialized countries. Mr. Anderson will look at how the business community may react to the changes which will affect Eastern Europe with the move to a market economy, the effect of the Asia Pacific Region, having regard to its growth and the expected growth in certain ports like those in Indonesia, Thailand, Korea and Japan, and the developments that business anticipated concerning international trade barriers (whether they will be dropped or amended).

As for the six Working Sessions, Mr. Wallace sought some assistance from the members to come up with a fifth paper for Session 1. In response to this request, a suggestion was made that Hamburg or Amsterdam, with the support of the other European ports, should be able to make a presentation in addition to that to be made by the Port of Tallinn. Some minor changes in the paper presentations were suggested.

Next Mid-term Exco and Other Committee Meetings (1994)

For the mid-term Exco to be held in 1994 in the African/European Region, there are three informal invitations from the Port of Copenhagen, the Kenya Ports Authority and the Port of Dakar, Senegal. The decision will be made at the Post-Conference meeting of Exco in Sydney on Friday, 23 April 1993.

The 20th World Ports Conference of IAPH in Europe in 1997

The Port of London Authority will offer an official invitation and make a presentation to the Board for approval

at its Post-Conference meeting on Friday, 23 April 1993 in Sydney.

Other Matters

The 19th World Ports Conference of IAPH is scheduled for June 11-17, 1995, hosted jointly by the Ports of Seattle and Tacoma, U.S.A.

In other respects, there will be a PIANC Congress in Spain in 1994 in the last week of May (the previous one was in Osaka in 1990), and an exhibition on port businesses. In 1996, there will be a VTS Congress in Rotterdam to discuss the environmental challenges for European ports.

J. Mather thanked J. Smagghe for his hospitality and J. Smagghe closed the meeting at 12:00.

Towards the creation of a new Committee on Intermodal Trends

By José Perrot
Port of Le Havre

During the mid-term meetings in Charleston in May 1992, a new scheme of organization of the Technical Committees was discussed by the Exco (ref. "Ports & Harbors" July-August 1992).

This new arrangement will be proposed to the Board in Sydney for approval.

To summarize, the Technical Committees will be grouped together in three "families", namely "Trade", "Ports", and Internal Affairs and Communications". Each family will be coordinated by a Vice-President.

In this new scheme the creation of new Committees was considered. Within the "Trade" group, a new Committee on Intermodal Trends was considered to allow an exhaustive analysis of the different issues dealing with this theme. The other committees working in the "Trade" group are the

committees on Sea Trade (Chairman: L. Liburdi), on Ship Trends (Chairman: J.M. Moulod) and Trade Facilitation (Chairman: D. Jeffery).

There is a high probability that this new organization will be approved by the Board. Therefore, Vice-President Jean Smagghe suggested that a working group start work on this item to allow the setting-up of the new committee as soon as the Board gives the green light at the pre-Conference joint meeting of the Board and Exco in Sydney.

President John Mather, Vice-Presidents Robert Cooper, Carmen Lunetta and Secretary General Hiroshi Kusaka supported this proposal.

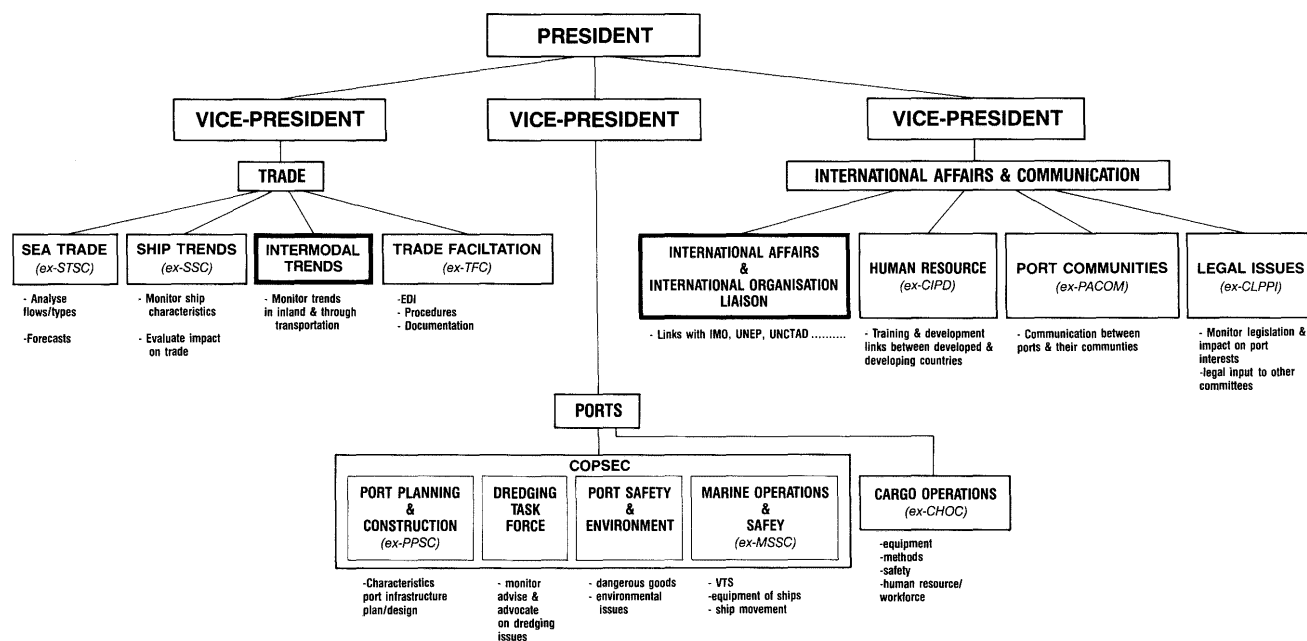
Draft terms of reference were drawn up and sent by Jean Smagghe to different ports in the three IAPH regions to set up a core of experts to prepare the work of the future committee.

As of February 4, 1993, the following member organizations had agreed to cooperate with the Intermodal Working Group:

Africa/Europe: Gothenburg, Amsterdam, Le Havre, Turkish State Railways

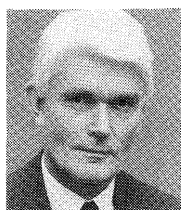
America: Canada Ports Corporation

Asia: Auckland, Osaka, Singapore, Maritime Services Board of New South Wales (Sydney)



During a meeting of the IAPH Officers of the African/European Region, at the suggestion of Jean Smagghe President John Mather decided to appoint Goran Wennergren, Port of Gothenburg, to coordinate the work of this new entity.

The first meeting will take place in Sydney during the 18th Conference.



Göran Wennergren

Draft Terms of Reference

Intermodal Transportation is by definition the combination of different types of transport (sea, rail, road, river, air) to improve efficiency of the trade throughout the world.

Ports have always been an interface between at least two modes of transportation.

Nowadays, the role of the ports has been extended from a "passive" role as a place of temporary storage to a dynamic role:

- on the one hand, the trend is to set up distribution centers providing added value for specific trades,
- and on the other hand, the ports play the role of "appointment organizer" in order to speed up the interchange of goods and avoid any delay in trade involving intermodal transportation.

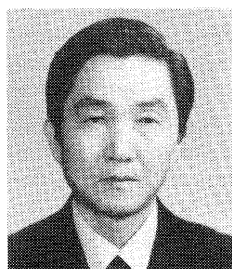
The main purpose of the Intermodal Committee is to stimulate port authorities of the three regions to achieve closer collaboration in:

- exchanging knowledge and experience in the field of intermodal issues,
- analyzing the technical issues and legislative aspects linked with the different modes of transportation,
- analyzing the new policies linked with inland transportation systems, interface facilities, distribution centers, etc.,
- analysing the economic impact on ports.

Therefore the Committee will:

- analyze these different aspects of the intermodal applications in the three regions (Africa/Europe, America, Asia) in tight cooperation with the other technical committees working on the related matters (CHOC, CLPPI, TF),
- liaise with international and regional organisations and carry out joint action programmes with them as appropriate to secure the benefits of intermodalism for the parties concerned.

Mr. Tu of Shanghai Elected to IAPH Board



Tu Deming



Wang Diandong

In accordance with information received from Mr. Li Ming Gui, Secretary General, China Ports & Harbors Association (CPHA), the eight IAPH Regular Member ports met recently to elect the IAPH Director and Alternate Director to represent them on the IAPH Board. As a result of the election, Mr. Tu Deming, Director of Shanghai Port Authority and Mr. Wang Diandong, Director of the Dalian Port Authority, have been elected as IAPH Director and Alternate Director respectively. The newly elected Chinese Board members are preparing to attend the joint meetings of the Board and Executive Committee scheduled during the Conference week in Sydney.

London Offers to Host 1997 IAPH Conference

It has been the practice of our Association to have the Board of Directors select the host for each conference four years beforehand during the previous conference. In order to enable the Board members to make the selection at its post-conference meeting on Friday, April 23, 1993 in Sydney, the IAPH officers in the Africa/European region were endeavouring to come up with the candidate for the host of the 20th World Ports Conference of IAPH to be held in 1997, following the 19th Conference which is scheduled for June 11-17 1995, jointly hosted by the Ports of Seattle and Tacoma.

On 26 February 1993, the IAPH Head Office received a letter sent by fax from Mr. D. J. Jeffery, Chief Executive, Port of London Authority (PLA), informing the Secretary General that the Port of London Authority would be delighted to host the 1997 IAPH Conference in London and that PLA's invitation would be made at the forthcoming Conference in Sydney.

The Tokyo Secretariat was, of course, delighted to receive the news of London's willingness to host the event in 1997 and is preparing to include this important subject in the agenda for the Board's meeting in Sydney. As of today, no other ports have indicated their interest in hosting the event. Thus London will become the host for the 20th Conference and that will mark the first time in 32 years since 1965 that our conference has returned to London.

Mr. Jeffery in his letter says, "I have already commissioned preliminary work and incurred expenditure in order that the Port of London Authority can give the necessary assurance that we are committed to, and are able to meet, the high standards expected by IAPH." Mr. Jeffery is preparing to formally make the invitation to the Board/Exco meeting in Sydney, where he will present a video supported by some promotional literature and respond to any questions.

IAPH Sends Message Of Sympathy to NY & NJ

On March 1, 1993, Mr. Hiroshi Kusaka, IAPH Secretary General jointly with his senior staff, sent a message of sympathy to Ms. Lilian Liburdi, Director, Port Department, Port Authority of New York and New Jersey (Chairman of the IAPH Sea-Trade Sub-Committee), and Mr. Patrick Falvey, Special Counsel of the Port Authority (Chairman of the IAPH Legal Counselors), expressing the deepest

sympathy of the IAPH officers and members concerning the tragic events caused by the explosion at the WTC buildings, home of the Port Authority and obviously one of New York's landmarks. The Secretary General's message was sent through the Port Authority's Tokyo office when the usual fax connections to New York were not yet available.

The IPD Fund: Contribution Report

Contributions to the Special Fund For the Term of 1992 to 1994 (As of Mar. 10, 1993)

Contributors	Amount
Paid:	(US\$)
ABP (Associated British Ports), U.K.	3,000
Akatsuka, Dr. Yuzo, Univ. of Tokyo, Japan	100
Akiyama, Mr. Toru, IAPH Secretary	
General Emeritus, Japan	1,000
Barcelona, Puerto Autonomo de, Spain	1,000
Cameroon National Ports Authority,	
Cameroon	480
Cayman Islands, Port Authority of,	
the Cayman Islands	250
Constanta Port Administration, Romania	250
Copenhagen Authority, Port of, Denmark	1,000
Cotonou, Port Autonome de, Benin	100
Cyprus Ports Authority, Cyprus	1,000
Delfzijl/eemshaven, Port Authority of,	
the Netherlands	350
de Vos, Dr. Fred, IAPH Life Supporting	
Member, Canada	150
Dubai Ports Authority, U.A.E.	500
Dundee Port Authority, U.K.	250
Fiji, Ports Authority of, Fiji	100
Fraser River Harbour Commission, Canada	250
Gambia Ports Authority, the Gambia	250
Ghana Ports and Harbors Authority, Ghana	250
Halifax, Port of, Canada	250
Hiroshima Prefecture, Japan	523
Japan Cargo Handling Mechanization	
Association, Japan	259
Japan Port and Harbor Association, the,	
Japan	493
Japanese Shipowners' Association, the, Japan	516
Klang Port Authority, Malaysia	200
Korea Container Terminal Authority, Korea	100
KSC (Kuwait Oil Company), Kuwait	1,000
Marine Department, Hong Kong	500
Maritime Services Board of New South Wales,	
Australia	367
Mauritius Marine Authority, Mauritius	200
Montreal, Port of, Canada	500
Nagoya Container Berth Co., Ltd., Japan	518
New York & New Jersey, Port Authority of,	
U.S.A.	1,000
Okubo, Mr. Kiichi, Japan	274
Pacific Consultants International, Japan	243
Penta Ocean Construction Co., Ltd., Japan	500
Point Lisas Industrial Port Development	
Co. Ltd., Trinidad	100
*Primer Concurso Internacional de Memorias	
Portuarias: Carlos Armero Sisto, Anuario	
de Puertos: Buenos Aires, Argentina	300

Public Port Corporation I, Indonesia	180
Qubec, Port of, Canada	250
Shipping Guides Limited, U.K.	500
South Carolina State Ports Authority,	
U.S.A.	1,000
Tauranga, Port of, New Zealand	500
Toyama Prefecture, Japan	254
UPACCIM (French Ports Association),	
France	1,905
Vancouver, Port of, Canada	500
Total:	US\$23,212

* 1st International Contest of Port Annual Reports sponsored by the Yearbook of the Port of Buenos Aires (Editor, Mr. Carlos Armero Sisto)

Mr. Kondoh in Europe

On Wednesday, 27 January, 1993, Mr. Rinnosuke Kondoh, Dy. Secretary General, and Mr. José Perrot, Port of Le Havre, visited the headquarters of the International Association of Cities and Ports (IACP, Le Havre) and received by **Mr. Antoine Ruefenacht**, IACP President. Major item on the agenda, on top of exchanging views on various items of mutual interest, was the collaborative work for the IACP's 4th Conference scheduled to be held from 11 to 16 October, 1993, in Montreal, Canada. IAPH agreed to act as a cosponsor for the event at the authorization given by President Mather in an early part of January this year. Mr. Kondoh was visiting Le Havre for the purpose of studying about the current situation of the Port inclusive of a technical visit to the construction site of the Normandy Bridge across the Seine prior to attending the regional meeting of African and European IAPH members called by President Mather and chaired by Mr. Smaghe which was held for two days of 28 and 29 January at the headquarters of French Ports Association in Paris.

On Friday, 29 January, 1993, Mr. Kondoh, after the conclusion of the Africa/Europe regional meeting held at the headquarters of the French Ports Association, was received by **Mr. Jean-Marcel Pietri**, Delegate General and exchanged views on various items of mutual concern inclusive of the possibility of joining IAPH.

On Monday, 1 February, Mr. Kondoh and Mr. A.J. Smith visited the IMO Headquarters in London and were received by **Mr. David Edwards**, Dy. Director, Marine Environment Division. At the meeting, Mr. Edwards suggested IAPH to take part in the planned IMO project for creating a guidelines or checklist for ports and oil handling facilities in relation to OPRC (oil pollution preparedness, response and cooperation).

On Tuesday, 2 February, Mr. Kondoh and Mr. A.J. Smith visited the Port of Sunderland (Sunderland, Tyne & Wear, U.K.), and met **Mr. Frank Major**, General Manager, to exchange views on various items of mutual concern on top of learning about the current situation of the port. On the next day, escorted by **Mr. N. Curle**, Sales and Marketing Manager of the Port, the visitors called on the Sunderland factory of Nissan Motor Manufacturing (UK) Ltd., to observe the assembly-lines for Micra and Primera cars.

On Thursday, 4 February, Mr. Kondoh and Mr. A.J. Smith visited the IMO Headquarters in London and were received by **Mr. William A. O'Neil**, Secretary General. Mr. Kondoh presented IAPH's appreciation to IMO for its

initiative towards the advancement of port interface.

On Thursday, 4 February, Mr. Kondoh and Mr. A.J. Smith visited the headquarters of Associated British Ports and were received by **Sir Keith Stuart** who will be attending the Sydney Conference to chair the session on the subject of "Ports and World Trade".

Visitors to Head Office

On February 3, a delegation from Djibouti visited the Head Office, where Secretary General Kusaka welcomed the visitors. They were Messrs. **Abdoukarim Moussa Omar**, Administration and Financial Manager, **Mohmoud I. Sougal**, Chief of Commercial Service, **Port Autonome International de Djibouti**, and **Peter Cave**, Managing Director, **Egerton Shepherd Limited**, a London-based Representative for the Port of Djibouti, accompanied by **Fouad Awaleh Meraneh**, Counsellor from the Embassy of



Seated from left, Meraneh, Omar and Sougal; Standing from left, Takeda, Kusaka and Cave

Djibouti in Tokyo. The party was visiting Japan to promote their ports among the shipping lines and trading companies.

On February 8, **Mr. Lee Sung-Kon**, President of **Pusan East Container Terminal Co., Ltd.** Pusan, Korea, visited the Head Office, where he was received by his IAPH friends, Mr. R. Kondoh and Ms. K. Takeda. Mr. Lee, who formerly served as Director General of Pusan District Maritime and Port Authority and then as President of Busan Container Terminal Operation Corporation (BCTOC), is now heading the biggest container terminal in Korea — Pusan East Container Terminal Co., Ltd., a new Regular Member of IAPH. According to Mr. Lee, his company was established in June 1991 and handled 1,900,800 tons of cargo in 1992. Mr. Lee and the IAPH staff exchanged views and information on issues concerning the container handling situation covering the major ports in the Asia and Pacific region.



From L: Lee, Takeda and Kondoh

On February 16, a group of six Russian experts of waterborne transport and commercial sea ports were the guests to the Head Office. Mr. Rinnosuke Kondoh, Dy. Secretary General, welcomed the party and exchanged views

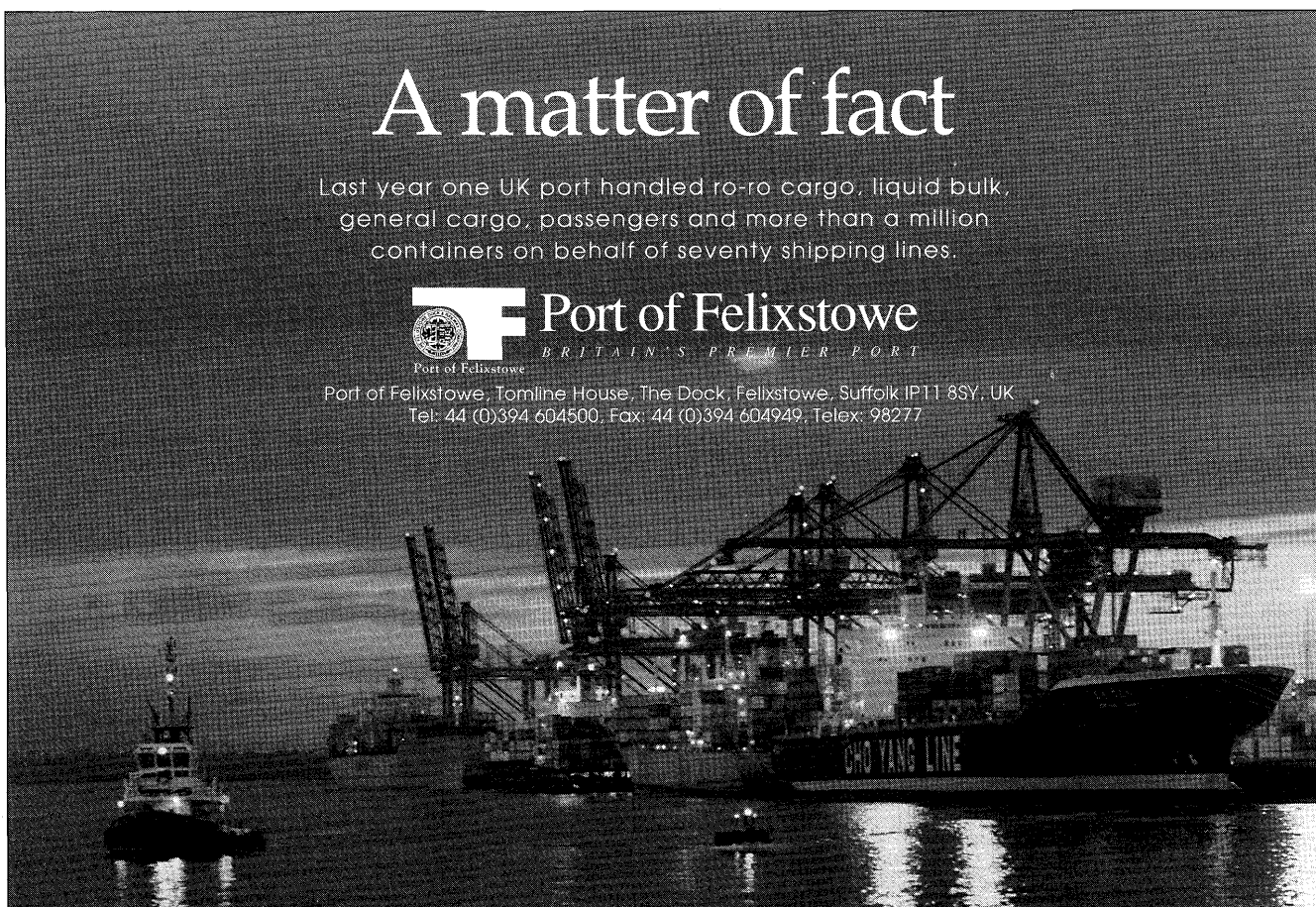
A matter of fact

Last year one UK port handled ro-ro cargo, liquid bulk, general cargo, passengers and more than a million containers on behalf of seventy shipping lines.



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on various topics of mutual concern. The party was visiting Japan, at the invitation by the Japanese Government, for the purpose of creating a tie of dialogue and technical cooperation among the parties concerned. The party visited the ports of Tokyo, Yokohama and Kobe during their 12-day stay in Japan.

The Mission member were:

- Mr. Yuri A. Livansky** (Mission Leader)
Chief, Port Operations Division, Department of Maritime Transport,
Ministry of Transport, Russian Federation (Moscow)
- Mr. Oleg A. Smirnov**
Dy. Chief, Department of inland Water Transport
Ministry of Transport, Russia (Moscow)
- Mr. Nikolay A. Khamiyuk**
Dy. Head of Port
Sea Trade Port of Kholmsk
- Mr. Alexandr B. Kononenko**
Vice President
Vladiostok Commercial Port Corporation
- Mr. Vladimir A. Popov**
Dy. General Manager
Free Economic Zone of Nakhodka
- Mr. Leonid Y. Terebizh**
Accountant General
Vanino Commercial Sea Port



(Picture taken at the IAPH Head Office)

On February 24, **Mr. Jorge E. Castex**, President, **World Trade Center Buenos Aires, Argentina**, visited the head office and met with Mr. R. Kondoh to exchange views on items of mutual interests. He was visiting Japan to attend the business seminars organized at Makuhari Messe, Chiba, a newly created exhibition complex.

Membership Notes:

New Members

Regular Member

Pusan East Container Terminal Company Limited (Korea)
Address: 8-12, Yong Dang Dong
Nam-Gu, Pusan 608-080
Mailing Addressee: Mr. Lee, Sung-Kon
President
Tel: 82-51-621-8111
Fax: 82-51-621-9111

Port of Stavanger Authority (Norway)
Address: Nedre Strandgt. 51
4005 Stavanger

Mailing Addressee: Mr. Michael Odland
Port Director
Tel: 47 4 50 78 00
Fax: 47 4 50 78 22

Associate Members

Institute of Harbour & Marine Technology [Class B] (China)
Address: No. 83, Lin-Hai Rd.
Wu-Chi, Taichung, Taiwan
Mailing Addressee: Mr. Chang, Chien-Kee
Director
Tel: 886-4-6564413
Fax: 886-4-6571329

South Pacific Forum Secretariat [Class D] (Fiji)
Address: P.O. Box 856, Suva
Mailing Addressee: Mr. Chris Rupen
Director of the Maritime Division
Telex: FJ2229 SPECSUVA
Tel: 312 600
Fax: 302 204

Waterfront Revitalization Research Center [Class B] (Japan)
Address: 3-26-1 Kaigan
Minato-ku, Tokyo 108
Mailing Addressee: Mr. Kiyoyasu Mikanagi
President
Tel: (Tokyo 03) 5443-5381
Fax: (Tokyo 03) 5443-5380

British Ports Association [Class B] (U.K.)
Address: Room 217, Africa House
64-78 Kingsway
London WC2B 6AH
Mailing Addressee: Mrs. Elizabeth Redmond
Association Secretary
Tel: 071-242-1200
Fax: 071-405-1069

Changes

Port Autonome de Marseille [Regular] (France)
Mailing Addressee: Mr. François Perdrizet
Port Director

Kenya Ports Authority [Regular] (Kenya)
Mailing Addressee: Mr. Albert C. Mumba
Managing Director

Autoridad Portuaria de Barcelona [Regular] (Spain)
(Formerly Puerto Autonomo de Barcelona)
Address: NIF. Q-0867012-G
Plaza Portal de la Pau 6
08039 Barcelona

Turkish State Railways (TCDD) [Regular] (Turkey)
Mailing Addressee: Mr. Talat Günsoy
General Director
General Director: Mr. Talat Günsoy
Director of Ports Department:
Mr. Ali Uyar

International Maritime Transport Academy
[Class D] (Netherlands)
Mailing Addressee: Mr. Ph. Sollman
Managing Director

OPEN FORUM

The Main-Danube Canal open for traffic

A 1200 year old idea becomes reality

(Reproduced from "HINTERLAND" 155E)

The European waterways network is navigable over a distance of 34,000 km. However, this network by no means forms an infrastructural unity.

The European Conference of Ministers of Transport (ECMT), at which 18 states were represented, in 1954 adopted a resolution in which all Western European inland navigation projects with an international dimension were summed up. The "European interest" label was awarded to 12 projects.

Major accomplishments include:

- flow regulation of the Moselle (1964)
- the Scheldt-Rhine Link (1975)
- the Elbe-Seiten Canal (1976)
- the Main-Danube Canal (1992).

The following projects are yet to be executed:

- the Meuse-Rhine Link
- the Rhône-Rhine Link

- expansion of the Upper Rhine
- the Elbe-Oder-Danube Link
- the Adria-Langensee Link.

The ECMT also set forth a division of the waterways into six different categories. The Main-Danube Canal falls under category IV (1,000-5,000 tonne ships). The means that, apart from the 1,350 dwt Europa vessel, it is accessible to large motor vessels and twin-barge push convoys with a length of 185 m, a width of 11.40 m and a deadweight capacity of 3,300 tonnes.

An old idea

As early as 793 AD, Charlemagne dreamt of connecting the North Sea to the Black Sea. Eventually, digging for this "Fossa Carolina" got bogged down, both literally and metaphorically.

The Bavarian monarch Ludwig I was more successful

1.221.000 PASSENGERS

OIL & OIL PRODUCTS 64 M.T. (million tons)

DRY BULK 15,4 M.T.

IRON ORE/STEELWORKS 12 M.T.

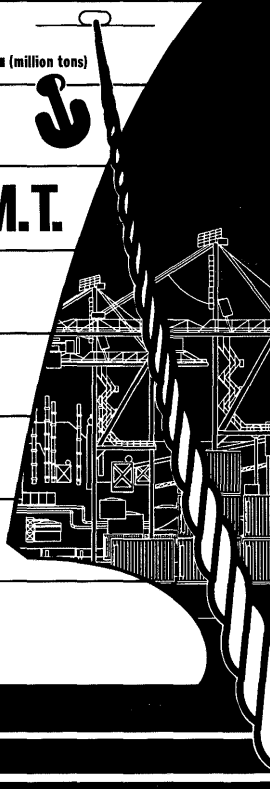
CONTAINERS 5 M.T.

NATURAL GAS 2,7 M.T.

INDUSTRIAL GAS 1,6 M.T.

CHEMICALS 2,2 M.T.

GENERAL CARGO 11 M.T.



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and opened the "Ludwig-Danube-Main" Canal in 1845. The fairway was accessible to ships of up to 127 tonnes. Unfortunately, the canal did not meet the expectations; not only was it too small, but it also had to contend with the increasing popularity of rail traffic. As a result, the canal quickly dwindled into oblivion.

However, the old idea of a modern continental link did not die with it. Some 70 years later, on 30th December 1921, the Rhein-Main-Danube AG was founded. The most important signatories to the treaty were the German Empire and the Free State of Bavaria, joined by the Free States of Hessen and Thüringen, as well as the cities of Mainz, Frankfurt, Bamberg and Nürnberg.

In an attempt to increase the building capacity, construction got underway on both sides, with the river Main being canalized and added with locks east of Aschaffenburg.

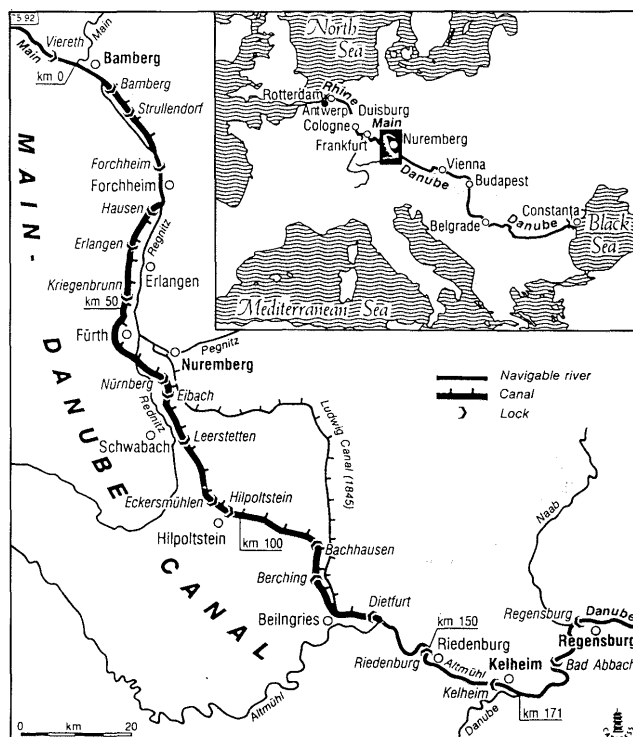
Subsequent connections were made to Würzburg (1939), Bamberg (1963) and Nürnberg (1972). After Bamberg, the river Main was no longer followed; instead, the actual Main-Danube Canal was constructed, which joins the Danube at Kelheim, via Nürnberg.

In the early eighties, Germany was in an uproar over the completion of the link because of a lack of financial resources. In February 1983, the project was finally given the go-ahead following increasing political pressure from Southern Germany.

Geographical location

The canal is 117 km long from the river Main in Bamberg to the Danube near Kelheim, with sixteen locks bridging a difference in height of 200 m. The total length of the waterway between Aschaffenburg and Passau equals 677 km.

The new link connects the North Sea with the Black Sea, measures 3,500 km and runs through 9 countries: the Netherlands, Germany, Austria, Czechoslovakia, Hungary, the former Yugoslavia, Bulgaria, the former U.S.S.R., and Romania. However, it is also of major importance to Belgium, France, Luxembourg and Switzerland.



At the time of the inauguration of the Main-Danube Canal (September 1992), the links with the Rhine and the Danube are not yet able to accommodate the large vessels which are allowed on the canal.

Additional works, such as the deepening of the fairway, have yet to be executed between Aschaffenburg and Bamberg, as well as on the German-Austrian stretch of the Danube. It is expected that the entire link will only be completely finished around the turn of the century.

The immovable bridges across the canal constitute an obstacle for the development of container shipping on the link. Moreover, shipping will have to contend with floating ice for an average of about 10 days on the Main and ca 14 days on the higher Main-Danube Canal. Navigation will also be obstructed because of high water for approximately eight days per year.

The demolition of the lock and dam complex of Nagymaros in Hungary means that limitations in terms of laden draught will continue to exist. Another problem consists of the poor condition of ports in the former Eastern Bloc. The Budapest-Csepel port, to name but one, employs a grand total of 500 workers, only 85 of whom are directly involved in cargo handling. This is just one of many typical examples of past planned-economy policies.

Financial and legal problems

From a *financial point of view*, the Rhein-Main-Danube AG is a public limited company, organized according to German law, with an issued capital of DM 200 million. The object of the RMD AG was not only to construct a waterway, but it was also awarded the concession rights for hydraulic-power plants on 5 rivers (the Bavarian part of the Main and Danube, as well as the Regnitz, Altmühl and the Lower Lech).

Revenues derived from the sale of the generated electricity go towards the construction of the canal. Should this form of 'autofinancing' prove insufficient, the Federal Government and the Free State of Bavaria have committed themselves to granting a rent-free loan in a 2 to 1 ratio. The total cost price of the canal will amount to about DM 4,500 million and will be entirely financed by the German Republic.

The *legal status* is also quite important. The Rhine-Danube Link between Mainz and Passau is divided into three sections, which are subject to a different status. The *canalized Main* from the concurrence with the Rhine onwards falls under the well-known 1868 Mannheim Act, which governs the Rhine. The basic principles consist of total freedom of transport and freightage.

The *German Danube* from Kelheim up to the German-Austrian border is subject to the 1948 Belgrade Convention, which is applicable to the entire Danube.

The actual *Main-Danube Canal* is wholly located on German territory and as such completely falls within the remit of the Federal Republic of Germany, which determines the conditions under which international traffic is allowed on this part.

The legal intricacies consequent to the three different legal statuses, as well as the multitude of bilateral treaties may jeopardize the future development of traffic.

Economic implications of the Main-Danube Canal

Expected traffic

Between 1981 and 1983, various forecasts were made

with regard to the traffic expected on the canal. The results varied between 2.7 million tonnes according to the Planco Consulting Bureau, and 66.4 million tonnes according to the Bayerische Lloyd's.

In 1982, the Institut für Wirtschaftsforschung arrived at a volume of 5.5 million tonnes. This finding was predicated on the appeal the new canal exercises on industry and on the growth dynamics resulting from the construction of the link. The 1989 estimates of the Rhein-Main-Danube AG hovered around 8.5 million tonnes.

As a result of the geopolitical changes in Central and Eastern Europe, all existing forecasts, which were based on a rigid monolithic COMECON, have been superseded. At present, there is, what might be called, an inflation of various official and unofficial traffic forecasts, with expected tonnages of 10 to 15 million tonnes.

Consequences for Antwerp

First and foremost, the canal must be regarded as an additional means of transport. The increased accessibility of the region will stimulate the economic development, which, in turn, will have a positive effect on the Benelux seaports.

The distance between Antwerp and Budapest (over 1,900 km with 67 locks) can be covered in two weeks' time. The entire itinerary (from the North Sea to the Black Sea) can be covered by an inland vessel in approximately 20 days, assuming day and night-time sailing.

As a result of the aforementioned social changes in Eastern Europe, the analysis of the existing Antwerp traffic with these countries is relative. Based on N.I.S. (National Institute for Statistics) figures, we can provide a brief overview of the relative share of the various transport modes between 1980 and 1990 (see Table 1). The following Danube states were selected: Austria, Czechoslovakia, Hungary, Yugoslavia, Bulgaria and Romania.

Table 1
TRAFFIC WITH DANUBE STATES ACCORDING TO MODE OF TRANSPORT (tonnes)

Year	Sea-going shipping	Inland navigation	Rail	Road	Total
1980	550,318	30,303	132,388	151,416	864,425
1982	468,999	21,844	127,207	166,198	784,248
1984	256,088	19,043	145,838	227,307	648,276
1986	433,306	24,139	195,774	253,128	906,347
1988	450,376	33,905	197,595	415,999	1,097,875
1990	131,838	23,018	86,553	314,050	555,459

Source : N.I.S.

Over this period, traffic witnessed a sawtooth trend. After a fall between 1980 and 1984, the goods flow increased substantially, and nearly reached the 1.1 million tonne mark in 1988. Afterwards, the political developments induced a sharp drop. The traffic share of the various transport modes was also subject to strong fluctuations. Quite naturally, inland navigation did not play a significant role, remaining under the 5% threshold the entire period. The relative share of sea-going shipping was clipped considerably. While in 1980 some 63.7% was shipped by sea, this figure dropped continually, bottoming out at 23.7% in 1990. Rail was good for 22.5% in 1984, but saw its share plunge to 15.6% in 1990. The rise of road transport was particularly impressive over the last few years with a relative share of 56.5% in 1990, as against a mere 17.5% in 1980.

Table 2
TRAFFIC WITH INDIVIDUAL DANUBE STATES IN 1990 (tonnes)

	Sea-going shipping	Inland navigation	Rail	Road	Total
Austria	612	13,634	59,612	185,078	258,936
Yugoslavia	28,930	354	4,560	35,087	68,931
Czechoslovakia	10,555	6,542	7,987	41,698	66,782
Bulgaria	51,760	1,839	2,505	7,925	64,029
Hungary	3,787	339	9,445	35,777	49,348
Romania	36,194	310	2,444	8,485	47,433
Total	131,838	23,018	86,553	314,050	555,459

Source : N.I.S.

The contribution of the various Danube States to Antwerp traffic varied considerably (see Table 2).

In 1990, Austria's share in the total traffic amounted to 46.6%, while Yugoslavia, Czechoslovakia and Bulgaria hovered around the 12% mark. Hungary and Romania did not reach 10%, with 8.9% and 8.6%, respectively. Sea-going shipping was particularly important in the links with Bulgaria (80.8%), Romania (76.3%) and Yugoslavia (42%). The limited inland navigation generated its largest share in the goods flow with Czechoslovakia (9.8%) and Austria (5.3%). The construction of the Main-Danube Canal will totally transform the future potential of this mode of transport. Rail transport performed best with Austria (23%), Hungary (19.1%) and Czechoslovakia (12%). Road transport scored lowest in the Bulgarian and Romanian traffic with 12.4% and 17.9%, respectively. As for the other Danube countries, the dominant role of road transport varied from 50.9% for Yugoslavia to 72.5% for Hungary.

A division of the most important types of goods can be made for each mode of transport (see Table 3).

Table 3
DIVISION OF GOODS TRAFFIC WITH DANUBE STATES IN 1990 (1,000 tonnes)

Sea-going transport	— metal industry products	56,076
	— fertilizer	25,545
	— ores and metal residues	17,309
Inland navigation	— foodstuffs and cattle feed	8,265
	— metal industry products	7,740
	— machinery, vehicles, miscellaneous	
	manufactured goods	4,919
Rail transport	— machinery, vehicles, miscellaneous	
	manufactured goods	27,154
	— chemicals	22,489
	— oil and distillates	11,200
Road transport	— chemicals	107,781
	— agricultural produce and	
	livestock	80,137
	— machinery, vehicles, miscellaneous	
	manufactured good	50,445

Source : N.I.S.

Within sea-going transport, metal products constituted the most important traffic with a share of 42.5%. Inland navigation, on the other hand, was dominated by two types of products: foodstuffs and cattle feed, with 35.9%, and metal industry products (33.6%). Rail transport was also

(Continued from Page 18)

International Maritime Information

WORLD PORT NEWS

Le Havre Seminars

On Port Finance 10-19 May 1993

Objectives

The seminar will endeavour to explain the basic principles of port finance and the reasons why it is essential to have financially sound objectives. Sound financial management enterprise implies that all investments, whatever the sources of funding, must be made profitable. The financial techniques available to ensure this objective will be studied.

However, managing a port is not limited to deciding on investments: running of the enterprise implies continuous monitoring of performance and short, medium and long term forecasting. Hence the importance of showing how to develop forecasts, how results can be interpreted and how they can be used to define performance indicators. Finally the services rendered by a port must be paid for at their real cost.

The course will therefore concentrate on port tariffs, and will in particular explain how well-balanced tariffs can encourage maximum use of port facilities, and enhance overall profitability.

Public

All the executives who hold financial

or economic responsibilities, whether they belong to a port authority, an administration, or a company which operates port facilities and who are in charge of defining and implementing policies regarding budgetary control, investment and port tariffs.

Conditions for participation

Inscription fee and lunches: 10,400 F

Inscription deadline: 12 April 1993

Payable to Chambre de Commerce et d'Industrie du Havre

By bank transfer:

Crédit Industriel de Normandie

Account: 00019 - 0471900312 N

Programme director

M. de Monie, Coordinator of the IPER Training Programmes.

Programme

- Opening address and presentation of participants.
- Legal and financial aspects of different types of port organisations.
- Financial and accounting terminology.
- Port cost accounting.
- Traffic forecasting.
- Port project evaluation.
- Financial and operational targets for port tariffs.
- Budgetary planning and control in the short and medium term.
- Financial and economic objectives

of port organisations.

- Port privatization: concepts and techniques.
- Establishing port tariffs in developing countries.
- Standardized port tariff structures
- Port dues on cargoes in the port of Le Havre.
- Public service: economic and financial profitability.
- General cargo and container handling tariffs.
- The impact of maintenance cost on port tariff levels.
- Liquid and solid bulk handling tariffs in the port of Le Havre.
- Storage pricing.

On Port Competition 24-28 May 1993

Objectives

To determine key factors in port competition.

To analyse the relationship between terminal operators (taken in the widest possible sense) and their main users (shipping lines, forwarders, transport operators).

To assess the extent of commercial risk existing in terminal management.

To survey existing terminal contact conditions.

To propose methods, techniques and arrangements for containing commercial risks. To detail terminal contract

(Continued on Page 23)

A 1200 year old idea—

(Continued from Page 17)

dominated by two groups: machinery and vehicles (31.4%), and chemicals (26%). Similarly, road transport had its own diarchy: chemicals (34.3%), and agricultural produce (25.5%).

Stimulating effects

Emphasis has already been put on the fact that the changes in the political landscape have thrown the current levels of traffic with the Danube States off course for the future.

The 1990 study by the NEA (the Dutch centre for research, consultancy and training with regard to traffic and transport) dealt extensively with the possible consequences of the new shipping link.

Calculations reveal that incoming and outgoing overseas

transport of chemicals, metals and coal to or from Czechoslovakia and Hungary, which currently transits via Hamburg and Rijeka, would be more advantageous if it were to take place via the ARA (Antwerp, Rotterdam, Amsterdam) ports.

Container traffic, on the other hand, will have to take into account a limited loading capacity as a result of the various fixed riparian connections. This will obviously have an effect on the profitability. Further obstacles consist of the relatively long travelling times because of the numerous locks and the changeable water levels. Moreover, there are only 4 container terminals (Vienna, Bratislava, Budapest and Imail) along the Danube, while the Rhine can offer over 20.

The opening of the Main-Danube Canal will have a stimulating effect on inland navigation shipping. The canal not only provides an additional mode of transport, but also assists the reconstruction of a market-oriented economy in Central and Eastern Europe.

THE 18TH WORLD PORTS CONFERENCE OF IAPH

Theme: "Ports—The Impact of Global Economic Change"

April 17-23, 1993 in Sydney

Venues: Sydney Hilton Hotel



We look forward to seeing you soon in Sydney!

Since its establishment in October 1991, the Organizing Committee for the Sydney Conference has been working as a team to implement the programs and to ensure the preparation works for the event progresses smoothly. Since last announcement of the Organizing Committee's membership, Mr. Chris Drinkwater, Managing Director, MSB

Illawarra Ports Authority, has replaced Mr. Michael Muston who had resigned to take up another position outside the MSB, while the other members remain unchanged. All the Committee members now look forward to welcoming as many participants as possible in Sydney to attend the Conference and to enjoy Australia.



Hon Bruce Baird MP
*The NSW Minister for
Transport
Member, Honorary
Committee*



Max Moore-Wilton
*Conference Chairman
Director General of
Transport, NSW
& Member, Maritime
Service Board
of NSW*

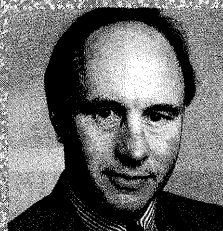
Organizing Committee



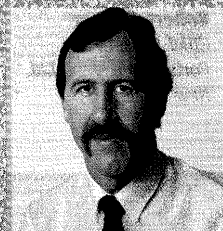
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Wayne L Gilbert
*Chief, Executive
MSB of NSW*



Executive Secretary
John Hayes
*General Manager, Port
Coordination & Planning
MSB of NSW Authority*



Murray Fox
*Managing Director
MSB Sydney Ports
Authority*



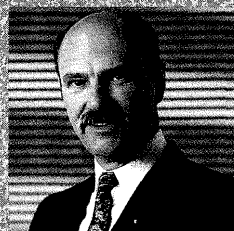
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*Managing Director
MSB Hunter Ports
Authority*



Chris Drinkwater
*Managing Director
MSB Illawarra
Authority*



Gerry Murphy
*Port Coordination
Manager
MSB*



Bill Pope
*Conference
Coordinator
MSB*



Special Adviser
Pauline Beckton
*Director
Int'l Convention
Management Services*



Special Adviser
John Wallace
*Managing Director
Associates
Honorary Member*

Working Session Chairmen

Except the Session 4 under the subject "Bulkloading Ports — The Australian Scene", the chairman of which is yet to be decided by the Organizing Committee, the following individuals have been assigned to chair the other five Working Sessions in Sydney.

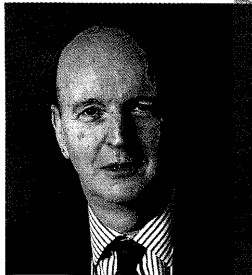
Session 1:

Ports and World Trade

Date: 1400-1700, Monday, 19 April

Chairman: **Sir. Keith Stuart**

Chairman, Associated British Ports Holding PLC, U.K.



Session 2: Ports in the '90s - Management and Financing

Date: 0900-1200, Tuesday, 20 April

Max Moore-Wilton

Director-General, Department of Transport NSW

IAPH Conference Vice-President & Chairman of the 18th Conference

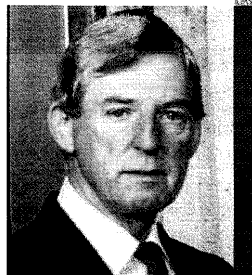


Session 3: Ports and Trade Facilitation

Date: 1400-1700, Tuesday, 20 April

Robert Cooper

Chief Executive
Ports of Auckland Ltd.
New Zealand



Session 4:

Bulk Loading Ports - The Australian Scene

Date: 0900-1200, Thursday, 22 April

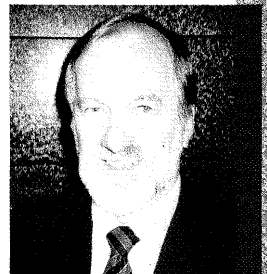
(Chairman to be decided)

Session 5: Ports and the Environment

Date: 1400-1700, Thursday, 22 April

Hedley Bachmann

President, AAPMA

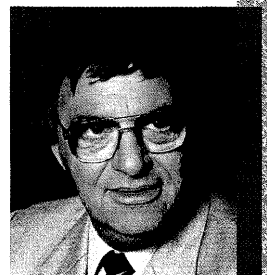


Session 6: Ports and Human Resources

Date: 0900-1200, Friday, 23 April

Carmen Lunetta

Port Director
Port of Miami
U.S.A.



SYDNEY HILTON GRAND BALLROOM

In Sydney:

Exhibition of Osaka Children's Paintings

The IAPH Public Affairs Committee (PACOM) has been promoting programs designed to help educate the public about the value of their ports. In connection with this initiative, an IAPH coloring book was published in 1987 as an example of such publications to be produced by any member organizations in their own languages.

In support of this initiative the Port of Osaka held an exhibition of paintings by primary and secondary school

children on the occasion of an international forum "Waterfront 2001", which the City of Osaka organized in October 1991, where experts from Japan and abroad discussed the accomplishments and goals of waterfront revitalization throughout the world.

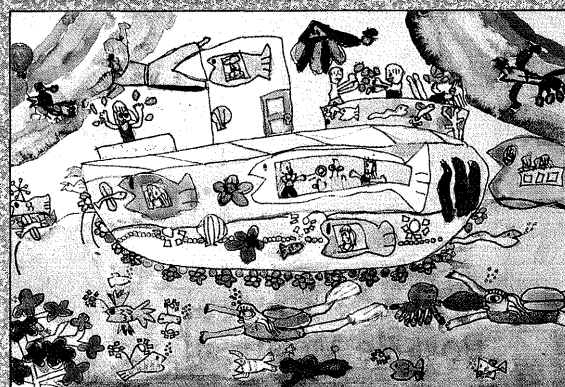
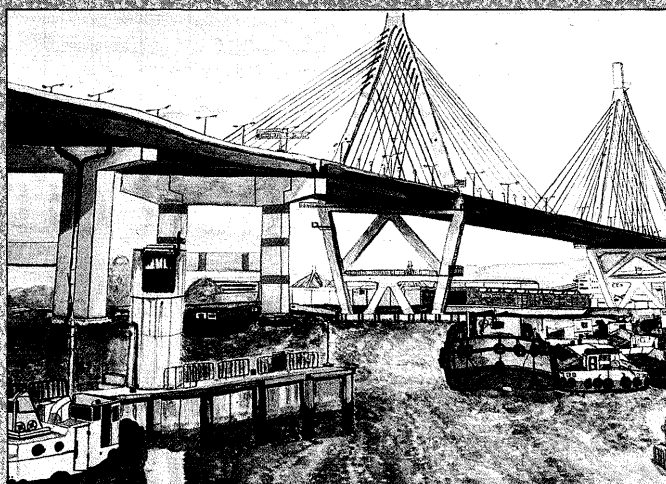
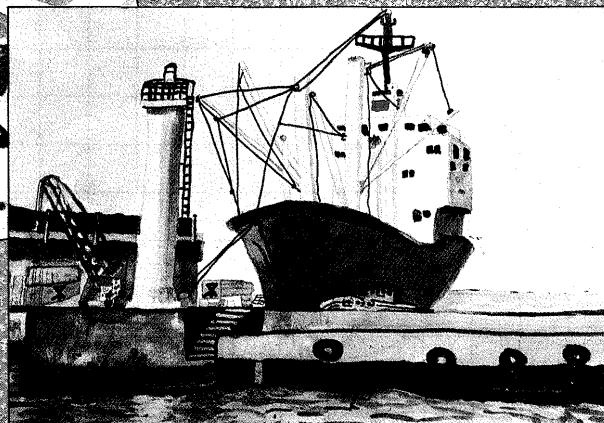
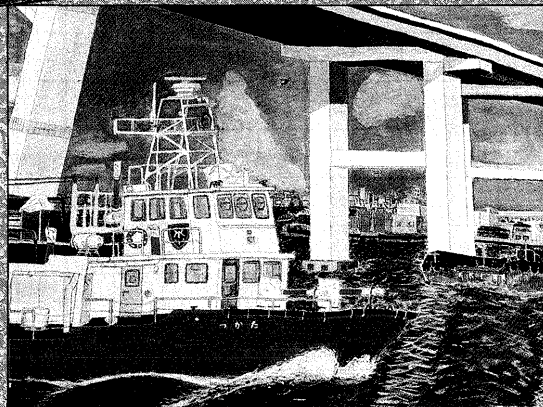
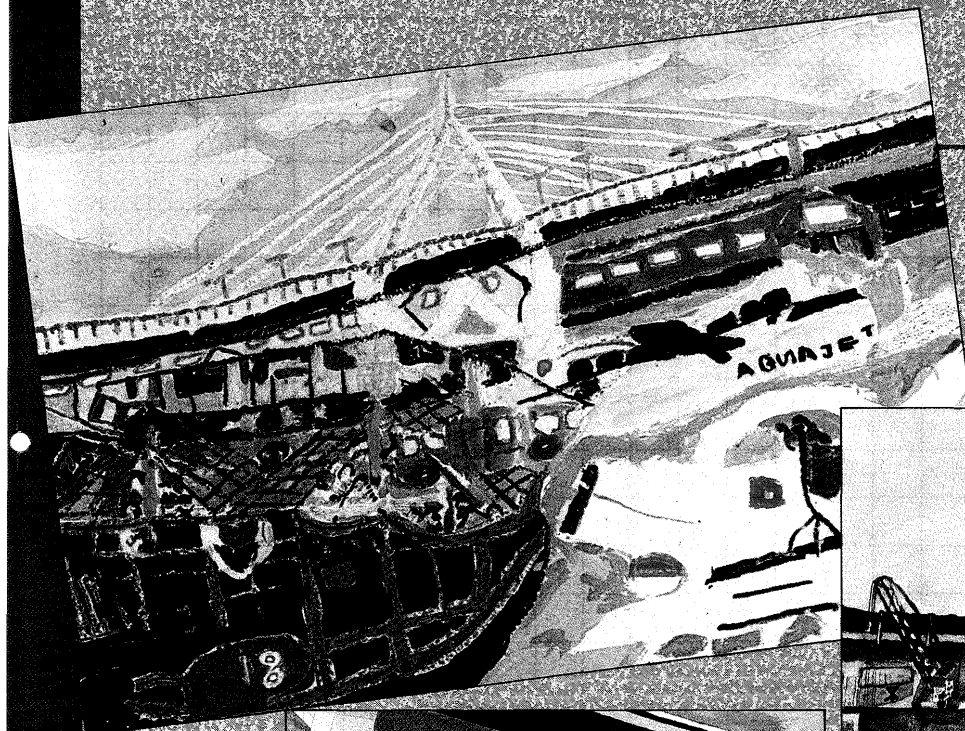
The exhibition, held in Osaka from October 14 to November 10, 1991, depicted the present and future image of the Port of Osaka. It was aimed at helping schoolchildren, our future leaders, to better understand the roles played by ports and harbors as well as the need for waterfront development. The Port of Osaka, whose successive Directors have been actively serving on the PACOM, organized this exhibition in an attempt to create an increased level of interest among children in ports and harbors. This scheme will be

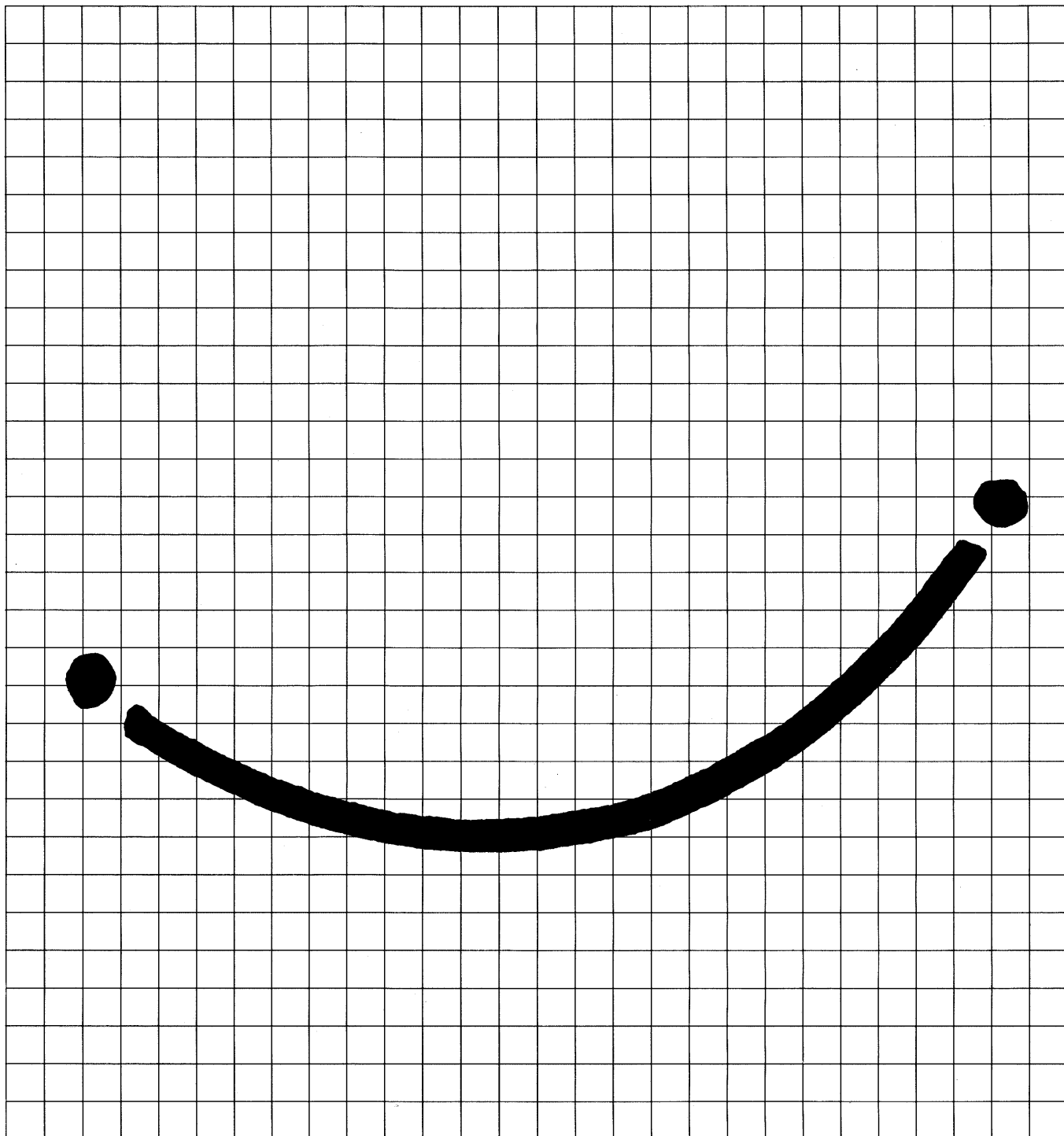
developed into a global movement of "Port Painting by Children".

When the PACOM met in Charleston a year ago, the Port of Osaka delegation impressed the PACOM members with its report on this successful exhibition in Osaka and showed color pictures of the prize-winning paintings, a collection of which was made into a set of postcards.

Mr. John Hayes, Executive Secretary of the Organizing

Committee for the 18th Conference, who was one of those who were deeply impressed by the Osaka children's paintings in Charleston, thought that these pictures could be exhibited in Sydney during the Conference week. In response to Mr. Hayes' request, the Port of Osaka has arranged for some 30 selected pictures to be shipped to Sydney, where the Conference participants will be able to see the fine pictures produced by Osaka children, including those shown below.





It pays to take short cuts



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Port of Montreal lies on the shortest, most direct route between Europe and North America's industrial heartland. For shippers, it pays off with consistent, year-round service and an outstanding record of efficiency.

Port of Montreal: In a position to save you money.

(Continued on Page 18)

conditions which are mutually beneficial to terminal operators and users.

Public

Terminal operators and managers of stevedoring/cargo-handling companies; managers of shipping lines, shipping agencies, forwarding agencies and inland transport companies.

Conditions for participation

Inscription fee and lunches : 6,500 F

Inscription deadline : 26 April 1993

Payable to Chambre de Commerce et d'Industrie du Havre
By bank transfer:

Crédit Industriel de Normandie
Account: 00019 - 0471900312 N

Programme director

M. de Monie, Coordinator of the IPER Training Programmes.

Programme

- Opening address and presentation of participants.
- Elements of port competition.
- Found-the-world services, pendulum services, feeder services and their role in generating increased competition.
- Analysis of port competition in the North-West European range, in S.E. Asia and in the USA.
- Transshipment and its impact on port marketing.
- Privatization as a strategic operating tool.
- Reasons for and examples of internal port competition.
- Do shippers/receivers select port?
- Port competition and subsidization policies.
- The impact of inland transport on port competition.
- Visit to the port of Le Havre.
- Analysis of commercial risks facing ports.
- Commercial risk and financial viability of modern port facilities.
- Analysis of terminal lease contracts and their role in reducing commercial risk.
- Pricing: an effective weapon in the port competition battle? Round-table discussion.
- Loss and damage exposure of container operators: importance of terminal liability insurance accept-

ance by container terminals.

- Analysis of terminal contract conditions.

For further information, please contact:

The Le Havre Port Training Institute (IPER)
9, Rue Émile Zola
76087 Le Havre Cedex-France
or Telex: 779663 F
or Telex: 35.41.25.79

Buenos Aires Seminar On Containers in April

An international seminar on Containers will be organized by Anuario Portuario y Marítimo de Puerto de Buenos Aires (Yearbook of the Port of Buenos Aires, Editor, Mr. Carlos Armero Sisto) during 29-30 1993 in Buenos Aires, Argentina.

Port experts from Argentina, Germany, the United States of America, Spain, France, Brazil, Uruguay and Chile are expected to speak on a range of subjects such as Privatization in South America, Container Revolution, Intermodalism, Container Terminal Operations and so on.

For details, please contact:-

Mr. Carlos Armero Sisto, Editor
Anuario Portuario y Marítimo
Talcahuano 77.-2do
Dto.7. (1013) Buenos Aires
Argentina
Fax: 54-01-383-1586

Legal Aspects of VTS Considered: IMO

The Legal Committee of the IMO began its consideration of the legal issues involved in making vessel traffic services (VTS) and ship reporting systems mandatory.

These have been introduced in many parts of the world, especially in areas of heavy traffic, in narrow channels and in the approaches to ports or where the environment is sensitive.

The VTS and reporting systems are voluntary, but in many cases IMO has recommended that shipowners and masters of ships observe them by reporting their ship's position to the shore authorities. This enables the latter to identify the ship and to communicate with it instantly in the event of an

emergency. The Sub-Committee on Safety of Navigation has now recommended that the observance of VTSs should be made mandatory in certain cases.

The Maritime Safety Committee discussed the matter at its 60th session but felt that the crucial issue to be decided is the extent to which shore authorities have the right to require foreign ships to identify themselves when the VTS is in international waters. There is general agreement that VTSs are beneficial in reducing accidents and enhancing maritime safety generally.

France proposed that chapter V of SOLAS 1974 be amended to give coastal States the right to call upon ships entering a VTS. The requirement would be limited to establishing the identity and position of the ship concerned.

The delegate of France said that a VTS system had been introduced at the western end of the English Channel following the *Amoco Cadiz* accident of 1978, in which a tanker ran aground off the French coast, spilling 230,000 tonnes of oil into the sea. The system was voluntary and 50% of the vessels using the system did not establish contact. The French delegate said that the proposal was in conformity with the United Nations Convention on the Law of the Sea (UNCLOS).

Other delegates were less convinced of this and one said that UNCLOS contained a clear indication of a restrictive approach with regard to the introduction of mandatory elements into VTSs. Several delegations said that no existing treaty provided the necessary legal basis for the establishment of a mandatory VTS.

The Committee decided to include consideration of the subject as a priority item in its work programme. The United Kingdom offered to host a meeting of interested delegations to discuss the issue and to prepare a paper for consideration at the next session of the Committee. The offer was accepted.

Safety Major Topic at BulkTrans 93 in May

The threat of new ship safety legislation and stricter port state control in the wake of recent bulk carrier losses will be at the heart of a major safety debate at BulkTrans 93, the bulk industry's international transport and

handling conference which takes place in London, 25-27 May 1993.

Mr. William Bolitho, chairman of Australian National Lines, will present the findings of the "Ships of Shame" report and challenge the conspiracy of silence that has protected certain companies from using ageing and unsafe vessels manned by unskilled crews in order to save costs.

Whilst pressing for the implementation of the IMO's International Safety Management Code, Mr. Christoph Hinz, head of the maritime transport division at the German Ministry of Transport, will outline the possibility of unilateral legislation if enforcement of international legislation fails.

Mr. Paul Shanahan, counsellor, agriculture and commodities division of GATT, will put the safety debate into a wider economic perspective, outlining developments in GATT and their likely effect on shipping and freight rates.

These and other issues concerning the international bulk shipping and ports industries will be discussed at BulkTrans 93.

For further information, please contact Sarah Derham, CS Publications Ltd, McMillan House, 54 Cheam Common Road, Worcester Park, Surrey KT4 8RJ, UK. Tel +44 81 330 3911. Fax +44 81 330 5112.

New Publications

Lloyd's Ports of the World

Published by Lloyd's of London Press; Editor Brian A Pinchin; ISBN 1-85044-424-2; ISSN 0266-6197 (viii) + 864 pp. Price £130.

The 1993 edition of Lloyd's Ports of the World, the eleventh edition to be published by Lloyd's of London Press, catalogues some 22,000 changes that have occurred to the data of 2,800 ports worldwide.

In line with current world events Latvia, Lithuania and Estonia are now listed as separate countries within the European section; and the USSR heading has been changed to the Commonwealth of Independent States. Similarly Croatia, Montenegro and Slovenia are now listed as separate countries and not, as before, within Yugoslavia.

The hardback reference directory is divided into continental sections, with ports listed alphabetically within each section. The extensive information on contacts and facilities at each port is complemented with details of approach and anchorage, hazards and tides. Also given is the port position plus number of the UK Admiralty Chart on which it is to be found and the Admiralty Pilot in which it is described.

Additional headings of Waste Reception Facilities and Documentation for Arriving Vessels have been added for many ports in this new edition.

A final section on International Free Trade Zones details some 300 zones worldwide.

Lloyd's of London Press Limited
Sheepen Place
Colchester
Essex CO3 3LP
ENGLAND
Telex 987321 LLOYDS G
Telephone (0206) 772277
Facsimile (0206) 772144

Ship Safety and Pollution Prevention Ship Management and Port State Control – 1992 edition

Sales No. IMO-594E, £5.00 (English)

IMO Dangerous Goods Labels, Placards and Mark (including segregation table)

Sales No. IMO-220E, £7.50 (English)

IMO Secretariat
Publications Section
4, Albert Embankment
London SE1 7SR, U.K.

Jane's Containerisation Directory 1992-1993

Growth in the container and intermodal transport business, particularly in South East Asia, continues to surge, despite difficult economic and trading conditions, say Patrick Hicks in the foreword to *Jane's Containerisation Directory 1992-1993* published on 23rd October, 1992.

Singapore, Malaysia, Thailand and Indonesia have seen much of this growth; as their economies are transformed through individual governments taking measures vital to the

growth of their manufacturing industries and a significant increase of foreign investment from Japan, Taiwan and Korea.

"The Regional Maritime Strategy Study (RMSS) of the Economic and Social Commission for Asia and the Pacific (ESCAP) predicts that the international containers passing through ASEAN ports alone will exceed 20 million TEU by the year 2000", reports the editor. "This is marginally more than the total number of containers currently handled by the East Asian ports of Hong Kong, Taiwan, the PRC and Japan."

In shipping terms, that volume would be sufficient to support a fleet of 20 x 2500 TEU capacity vessels, operating at 80 per cent capacity providing direct, overlapping services to South East Asia. In port terms, that throughput would require current container berth capacity in the region to be doubled, with three times the number of container gantry cranes.

"To achieve this could involve investments totalling US\$2,000 million", says Patrick Hicks.

The turnaround in the economies of the ASEAN countries has also been the catalyst for the tremendous surge in growth experienced in the intra-Asian liner trade, which in turn has resulted in a surge in box building capacity.

While South Korean and Taiwanese manufacturers are still the most powerful source, Patrick Hicks predicts a gradual shift in box production to many new factories in Thailand, Malaysia, Indonesia and China, who have already received significant orders from leading carriers and lessors.

This shift in the geographical centre of business is having a marked effect on the shape of the industry. In 1990, there were around 111 container manufacturing plants around the world, with a capacity of 1.1 million TEU per year. By the end of 1992, there will be an estimated 140 factories, with a combined capacity of nearly 1.9 million TEU annually.

The recent creation of the International Container Manufacturers Association (ICMA), based in Hong Kong, will mean the industry has a co-ordinated voice representing them on a global level, co-ordinating action on common issues which manufacturers and the users have to address — the

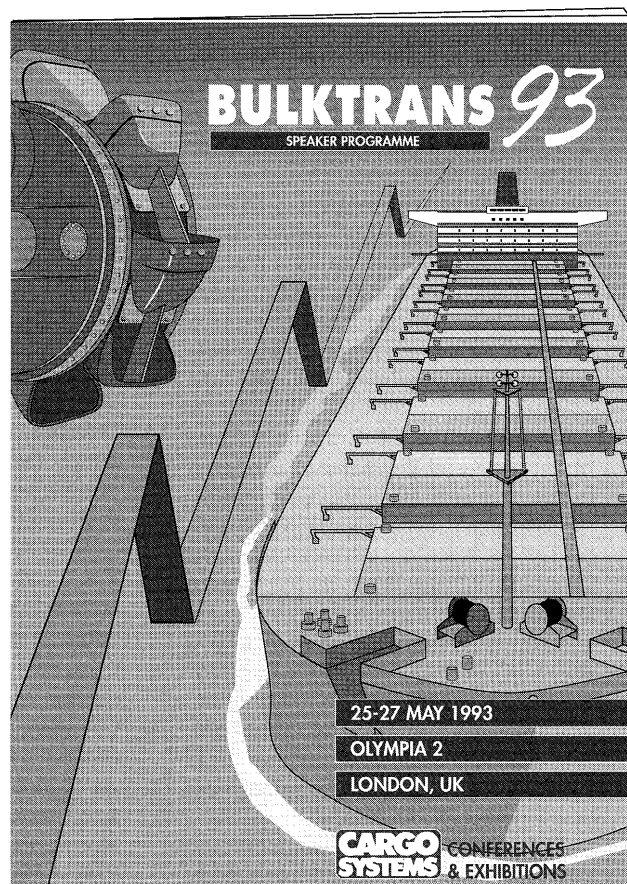
BULKTRANS 93

25-27 MAY 1993 , LONDON, UK

Plan to attend the 8th Bulk Handling and Transport Conference for a complete update on bulk handling practice, bulk commodity trends and bulk shipping forecasts.

Technical seminars and workshops at **BulkTrans 93** will give delegates first hand access to the issues impacting bulk terminal operations in the 90s and beyond.

Listen to the world's leading terminal engineers exchange ideas on environmental controls, bulk handling equipment design and terminal planning.



Programme highlights include: **European port policy** Fernand Suykens, Chairman, *EC Ports Division* • **Impact of the current GATT round** Paul Shanahan, Counsellor, *Agriculture and Commodities Division, GATT* • **Steam coal demand still booms** Graeme Robertson, Chairman and CEO, *Swabara Group, Indonesia* • **Ship safety - new enforcements inevitable?** Juan Kelly, Chairman, *International Chamber of Shipping*, Christoph Hinz, Head of Maritime Transport, *German Ministry of Transport* • **Agribulks - eastern Europe grain demand assessed** Daniel Amstutz, Director, *International Wheat Council*, Raymond Rogers, Research Director, *Finagrain (Continental Grains)*, Oleg Klimov, President, *Exportkhleb (Russian Federation)*.

For further information and to receive your copy of the **BulkTrans 93** programme attach your business card and fax to **+44 81 330 5112** or telephone **+44 81 330 3911**

CS Publications Ltd, McMillan House, 54 Cheam Common Road, Worcester Park, Surrey KT4 8RJ, UK.

use of environmentally-friendly materials in construction, the future reliability of supply and cost of new materials, etc. — and providing a communication link with other industry groups.

If changes in South East Asia are being undertaken because of traffic growth, the developments in Europe are the result of changing distribution patterns, environmental pressures and the goal of greater transport efficiency.

"With a combined transport development established as an EC objective in the Maastricht Treaty, the European Commission has prepared a ECU 2 billion (c \$2.48 billion) scheme to help put principle into practice," says the Editor.

He quotes the EC Transport Commissioner Karel Van Miert, "...the goal is the creation of a European multi-modal freight network, which is integrated technically, economically and geographically, and which will sustain the cohesion of the Community."

Jane's Containerisation Directory is the standard reference source designed to meet the specific requirements of the maritime and intermodal industries, giving a comprehensive and accurate overview of the growing international containerisation market.

The 1992-93 edition has increased coverage of the European swap-body market and further details of the developing international reefer and tank container manufacturing market. A new appendix of ISO standards is also included.

Jane's Containerisation Directory 1992-1993, edited by Patrick Hicks, is published by Jane's Data Division, part of Jane's Information Group, price £135/US\$225

Shipping in Canada/Le transport maritime au Canada 1991

By Statistics Canada (Ottawa: 1992). 154 pages. Tables. Figures. User Notes. Order from: Publications Sales, Statistics Canada, Ottawa, Ontario K1A 0T6, Canada. Fax: (613) 951-1584. Tel: (613) 951-7277. Price: Canada C\$41; United States US\$49; Other countries US\$57.

Canadian shipping activity in 1991 is profiled in exhaustive detail in this review by Statistics Canada. The agency

is Canada's counterpart to the U.S. Bureau of Census.

Coverage extends to domestic and international cargo movements, port activity, containers, vessel movements, and financial and operating data pertained to "Canadian domiciled marine carriers." Included, too, are regional analyses showing cargo and vessel traffic patterns by province as well as waterborne trade flows between Canada and its foreign trading partners.

Data highlights include the following:

- Domestic and international cargo totaled 350.1 million metric tons, down 0.7 percent from 1990. It was the third successive year of decline, with tonnage "slipping to its lowest level since 1986."
- Overseas tonnage surged to record 166.9 million tons, while cargo bound to and from the United States declined for the third year in a row, to 67.0 million tons.
- The "top" 20 Canadian ports accounted for 78.5 percent of total cargo tonnage handled in 1991, up from 76.8 percent in 1990 and 75.3 percent in 1991.
- Canada's seven "busiest" ports ranked by international (e.g., exports and imports) cargo tonnage were Vancouver, Sept-Îles/Pointe-Noire, Port Cartier, Saint John, Prince Rupert, Québec/Lévis, and Halifax.
- Top handlers of "international" containers based on TEUs were the ports of Montréal/Contecouer (535,000), Vancouver (348,000), Halifax (307,000), New Westminster/Fraser River (14,000), and Saint John (14,000). St. John's led in domestic container movements.
- Three commodities — coal (43.7 million tons), iron ore (34.4 million tons), and wheat (25.7 million tons) accounted for 51.3 percent of the international tonnage handled in 1991. Coal and wheat tonnage were each "much higher" than the previous year, but ore declined by 1.2 percent from 1990.
- Imports accounted for 28.2 percent of international cargo handled in 1991, or 65.9 millions (a 10.1 percent "contraction" from 1990). The decline was mostly due to reduced flows of coal (-19.4 percent) and crude oil (-7.1 percent).
- Leading domestic cargos were

wheat (23.2 million tons), logs and bolts (13.9 million tons), pulpwood (12.5 million tons), iron ore (12.1 million tons), and fuel oil (11.2 million tons).

- Total vessel movements at Canadian ports declined for the third year due entirely to reduced activity in the domestic sector. Details are shown below:

Vessel Movements at Canadian Ports 1989-91

	International	Domestic	Total
1991	58,826	44,285	103,311
1990	58,024	51,731	109,755
1989	57,046	58,787	115,833

Source: Statistics Canada

(AAPA Advisory)

The Americas

Montreal: Measures To Battle Competition

The Port of Montreal handled 17.5 million metric tonnes of cargo for the second consecutive year in 1992. Total traffic was 21.7 million tonnes in 1990, prior to recession.

Port activity in Montreal was hit hard again by the recession, which was accompanied last year by a reduction in grain exports via the St. Lawrence and merciless competition.

In presenting the port's operating results for 1992, the president and chief executive officer of the Port of Montreal, Mr. Dominic J. Taddeo, also spoke of a series of measures that the port corporation has taken to emerge from the recession and to battle increased competition.

Among these measures in a freeze of all general tariffs for 1993 and the enhancement of the port's tariff incentive program for containerized cargo. This plan provides rebates to the container shipping lines calling at Montreal.

With this freeze and the tariff incentives, "Our wharfage charges on containerized cargo will average \$2.10 per tonne in 1993, compared with the rate of \$2.25 per tonne which was in effect back in 1984, nine years ago," Mr. Taddeo said.

The president and chief executive

officer also explained that the port corporation had to make cost control one of its top priorities in order to be able to provide efficient services and facilities, set tariffs that take into account competition and the capability of its clients to pay, and be financially self-sufficient so not to be a burden on the taxpayer.

"This is what we have succeeded in doing, even in these difficult times," Mr. Taddeo said. He added that from 1986 to 1992 inclusively, the corporation's operating and administrative expenses increased only 2.9 per cent, compared with an inflation rate in Canada of 24 per cent over the same period.

"To reduce our costs, ... and like many other companies in the transportation field and other sectors of activity, we have had to accept, however reluctantly, reducing manpower at all levels ... and freeze salaries of management and non-unionized employees. That is a constraint placed upon us by fierce competition," Mr. Taddeo explained.

The president and CEO also pointed

out some encouraging signs. First, the port maintained its record level of 5.8 million tonnes of containerized cargo in 1992 despite the recession. Moreover, this traffic increased 6.8 per cent throughout the second half of the year. Also, many public and private organizations forecast an improvement in the North American economy in 1993.

Mr. Taddeo reiterated, however, that "competition on the North American East Coast is such that no port system can claim to enjoy a comfortable lead over its rivals."

With the entire maritime community gathered at the port's administration building for the presentation of the port's operating results for 1992, Mr. Bernard J. Finestone, acting chairman of the board of the corporation, joined Mr. Taddeo in appealing to all industries and labour within the Port of Montreal system, including the port corporation team, to continue their tireless efforts to provide exporters and importers with services that are more economical, more reliable, faster and better than those of its competitors.

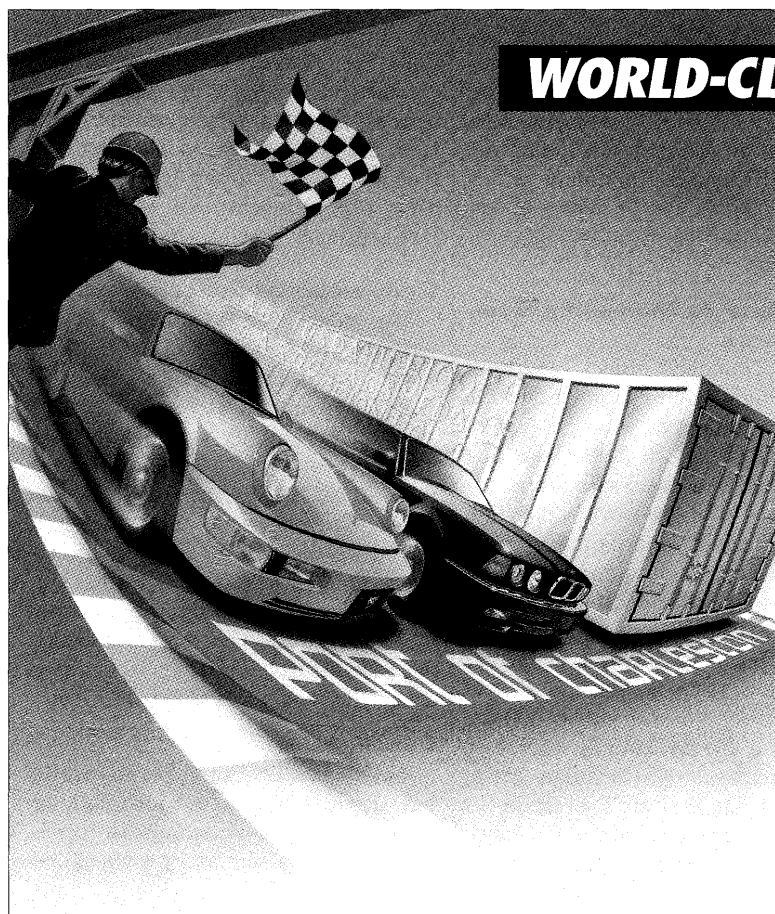
Thunder Bay Harbour Submission on Seaway

The Thunder Bay Harbour Commission is among some 25 industry representatives who have made or will be making presentations to the Seaway Sub Committee. The Commission's submission identifies and makes recommendations on the regulatory areas of concern. It documents the significant decline in traffic through the Seaway and the resulting consolidation and downsizing of the Canadian-owned vessel fleets. These trends are significant and are not reversible in the current regulatory and cost structures attached to using the Seaway.

The submission identifies the three cost areas associated with using the Seaway as vessel operating costs, cargo handling costs, (both of which are under constant review by owners/charterers) and the very substantial government imposed regulatory costs including Seaway tolls and pilotage.

Seaway Tolls

The St. Lawrence Seaway Authority is a federal crown corporation. It de-



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rives its income from toll revenues for which rate increases are sought and granted at levels far above increases in the commercial transportation markets. The Seaway Authority is caught in a cycle whereby higher tolls are contributing to declining tonnage and thus lower revenues which in turn demands higher tolls to maintain revenue adequacy. The Commission's submission calls for an immediate freeze on Seaway tolls and a cost/benefit review of the tolls and the Seaway Authority's corporate structure.

Further, under the General Agreement on Tariffs and Trade (GATT) proposal, government investment in inland waterways, their infrastructure and operations, is considered 'green'. Accordingly, the federal government could eliminate Seaway Tolls and use the Seaway to assist Canadian exports, while meeting the GATT criteria.

Pilotage

Pilotage is a legislated monopoly for a compulsory service. Although there is no opposition to pilotage services to ensure safe and efficient vessel operation in the system, the Thunder Bay Harbour Commission believes that the current cost excesses for pilotage services must be brought into line. The Commission's submission recommends establishing a bi-national directorate to refine existing regulations that govern pilotage. Coast Guards of both Canada and the U.S. should have majority representation with additional membership from system users, service providers and qualified individuals representing government. Further, the submission recommends that the directorate establish an independent board of examiners to deal with pilot qualifications and certification.

Western Grain Transportation Act

The piece of Canadian transportation policy most threatening to the future of the Great Lakes/St. Lawrence Seaway system is the Western Grain Transportation Act. The \$720 million Crow Benefit, as paid to the railroads on an average distance related basis, provides for a system which is incognizant of the concept of efficiency and further promotes the desire to reward inefficiency.

Relegating the Seaway to a residual route for grain has contributed to its

decline. The disappearance of vessel capacity has had supply/demand implications and affects other commodities such as the backhaul movement of iron ore for the Ontario steel industry. The Thunder Bay Harbour Commission submits that transportation decisions should be placed in the hands of the producers/shippers. This will remove transportation distortions inherent in the W.G.T.A. which create a west coast bias for grain shipments, and introduce efficiencies into Canada's grain-handling system such as direct trucking to terminal position in Thunder Bay.

The Thunder Bay Harbour Commission appended to its submission, the F.A.C.T.S. Coalition's Position Paper on Grain Transportation. The paper included recommendations for changes to the W.G.T.A. including: removing the modal bias and giving the benefit directly to the producers (a definite first choice) or extending the subsidy formula to include all modes of transportation; leaving unchanged the pooling system employed by the Canadian Wheat Board unless modal and rate biases inherent in the W.G.T.A. are removed; compensating farmers so that the Seaway is a viable and affordable transportation option if rail subsidization is discontinued; ensuring that average distance related freight rates reflect actual rail costs attendant to using individual ports including rail car use efficiencies, mountain differential, distortion due to length of rail haul and the use of government supplied hopper cars.

Constraints to Increasing Competitiveness

The Thunder Bay Harbour Commission's submission examines several of the forces which constrain the competitiveness of the Seaway. The restricted size of the locks limits the Seaway to 7% of the world's dry bulk vessels of which approximately two thirds trade on Asian routes. These and other factors indicate an impending crisis in vessel availability for the Seaway. Whether or not owners regenerate fleets with Seaway capable vessels will depend solely on the vitality of the system and the availability of future cargoes particularly Canadian grain. Deepening the Seaway's draft by .3 meters (1 ft.) is recommended as a major commitment to its future competitive-

ness.

Competitive Routings

The Mississippi River is a government subsidized route which has become an aggressive competitor to the Seaway. The significant commitment by the American taxpayer to the economic, social and environmental desirability of an inland waterway is a philosophy which should be adopted with regard to long-term viability of the Seaway.

Canadian railways are expanding their American operations and bypassing Canadian routings thereby avoiding regulatory costs imposed by the federal and provincial governments. This provides them the ability to cut costs to shippers. This has led to the decline in the movement of coal and potash through the Port of Thunder Bay. Canadian grain shipments are also bypassing the Port of Thunder Bay and the Great Lakes.

The submission also highlights the problems faced by the Port of Thunder Bay and the Seaway in competing with grain shipments east of Thunder Bay to southern Ontario and Quebec. These shipments are moving by rail under confidential rates which, for comparable distances, are significantly lower than the current WGTA rate. The Thunder Bay Harbour Commission believes that it is the guaranteed profit from the WGTA rate to Thunder Bay that allows the railways the ability to price rail shipments east of Thunder Bay artificially low.

Environmental Concerns

The submission documents the environmental effects of modal shifts from water to rail and/or road in terms of energy consumption, emissions and accident probability (see article page 9). There must be a commitment on the part of the governments adjacent to the Seaway route to sustain this inland waterway. The Commission recommends, in its submission, that Canadian transportation policy incorporate the objective of minimizing negative environmental impacts inherent in the movement of goods.

Conclusions

The current decline in Seaway traffic has negative and multi-jurisdictional consequences in international trade, revenue, manpower and provincial re-

lations. Canada needs the Great Lakes/Seaway System to compete in the ever-changing world markets. National transportation policies must be implemented which acknowledge the fundamental desirability of a competitive Canada. For the Seaway ... reform the WGTA, reform outdated pilotage practices, reduce or eliminate government imposed costs in the system and harmonize Canadian and American regulations and services to Seaway users. What is required is an elimination of the individual policies in unrelated revenue generating jurisdictions and a blending of policies designed to service trade flows and strengthen Canada's transportation industry.

Corpus Christi Tonnage Hits All-time High

Tonnage at the Port of Corpus Christi hit an all-time high last year, with more than 72.5 million tons moving through the port during 1992. This surpasses the previous record of 71.4 million tons set in 1990 and constitutes a 3 percent increase over the 70.4 million tons shipped during 1991.

Petroleum tonnage, at almost 59 million tons, was the highest in the port's history. This commodity, which consistently makes up the majority of the port's tonnage, showed a 5 percent increase over the previous year and accounted for 81 percent of total tonnage.

The largest percentage increase, 396 percent, came in containerized tonnage. With the opening of the port's new multi-purpose dock in May, containerized tonnage climbed from 559 short tons in 1991 to 19,540 short tons. Chemical shipments, at more than 6.3 million tons and dry bulk shipments, at 6.2 million tons, each accounted for 8 percent of the tonnage. Export grain, general cargo and liquid bulk shipments rounded out the total tonnage.

By far the highlight of the year, the opening of Cargo Dock 8 saw rise to increase shipments of not only containerized cargo but heavy machinery, project cargo and steel as well. From May through December, more than 54,000 short tons and 1,662 containers moved over Dock 8. The heaviest pieces, two hydrocracking reactors weighing in excess of 500 tons each, were unloaded in early November. The

units were discharged directly to railcars and transported to Diamond Shamrock's Three Rivers, Texas, refinery.

According to Port Executive Director Harry G. Plomarity, the third year of 70 million plus tonnage proved very encouraging for port officials. "Record-breaking port activity is just one of several promising signs that South Texas' economy is improving. Petroleum shipments, for example, reached an all-time high of almost 59 million tons and local refineries announced proposed expansions totaling in excess of \$1 billion. This is certainly good news for South Texas."

The port's own dock opening had a significant impact on the local maritime industry. International Longshoreman's Association man-hours rose dramatically and local stevedoring companies made major investments to better enable them to handle container maintenance and repair.

Also in 1992, the port completed Port of Corpus Christi 2010: Strategic Plan and adopted the new mission statement: it is the mission of the Port of Corpus Christi Authority to serve as a regional economic development catalyst while protecting and enhancing its industrial base and simultaneously working to diversify its international maritime cargo business.

Construction began in August on a 65,000 square foot warehouse on Cargo Dock 14. The warehouse is being partially funded by a grant from the Economic Development Administration. The grant is to be used for the expansion and construction of warehouses 9, 14 and 15, and is expected to alleviate storage congestion. The expansions will result in a 91 percent increase in square footage over public warehouse space presently available.

The port also increased its trade development efforts focused on Mexico in anticipation of the passage of the North American Free Trade Agreement. In turn, port officials played host to a steady stream of foreign officials, ranging from Mexican government transportation officials to delegations from the Crimean region of the former Soviet Union to Japan and the People's Republic of China. All were interested in learning more about the port's capabilities and its role once the agreement is activated.

In on-going matters, port commis-

sioners, late in the year, gave the go ahead for an environmental impact study on Safeharbor, a deep draft in-shore oil terminal proposed for the port's Harbor Island division. The study is expected to take several years to complete.

The Port of Corpus Christi is currently ranked as the sixth largest port in the United States in terms of total tonnage by the U.S. Army Corps of Engineers. It ranks third in the country for import tonnage.

GPA Brunswick Facility For Saturn Exports

Saturn Corporation will begin exporting vehicles out of the Georgia Ports Authority's Colonel's Island automobile terminal beginning in February 1993. The initial shipment will be on Saturday, February 27.

The cars, manufactured by the General Motors subsidiary in Spring Hill, TN, will be processed by International Auto Processing prior to export.

"Saturn is the first automotive manufacturer to choose the versatile automotive terminal in Brunswick for exports," says Mr. George J. Nichols, executive director of the Georgia Ports Authority (GPA). "The spirit of teamwork made the Saturn acquisition possible. There is excellent cooperation between GPA, IAP and the International Longshoremen's Association."

Saturn selected the Brunswick facility "after an extensive analysis of port processing sites and related transportation availability," said Mr. Clarence Roberts, IAP's vice president of sales and marketing.

Last year, GPA reported 121,581 units moved through the Colonel's Island facility, a 26 percent increase, over the previous year.

The GPA operates terminals at the deepwater ports of Savannah and Brunswick as well as barge terminals at Bainbridge and Columbus and maintains trade development offices in Savannah, Brunswick, Atlanta, New York, Athens, Oslo and Tokyo.

New Hours at Houston Speed Truck Traffic

The regular work day at Fentress

Bracewell Barbours Cut Container Terminal has been expanded by two hours to expedite truck traffic through the facility. The new hours became effective Oct. 1.

The terminal is now open to road traffic from 7 a.m. through 5 p.m. Monday through Friday and will remain open during the noon hour each day. Previously, the terminal opened at 8 a.m., shut down operations for lunch at noon and reopened at 1 p.m.

The expanded schedule was made possible by negotiations between the Port of Houston Authority, the International Longshoremen's Association (ILA), local steamship lines, truck operators and other segments of the industry.

"The entire industry was very cooperative in accomplishing this," was Mr. Jimmy Jamison, manager of Barbours Cut Terminal. "We held several negotiation sessions to arrive at this decision, and everybody involved agreed that Barbours Cut Terminal must grow. The terminal will grow if we continue to enhance our services, and that will benefit the entire industry."

ILA Support

In support of the new schedule, the ILA agreed its longshoremen will begin work an hour earlier, at 7 a.m., and the pay for the noon-to-1 p.m. hour will be straight time, rather than double time. Mr. Clyde Fitzgerald, secretary-treasurer for the South Atlantic-Gulf Coast District of the ILA, says the new hours will benefit longshoremen and the entire shipping community.

"We hope this change will maintain the business already calling at Barbours Cut Terminal by helping to get the boxes in and out quickly and will also attract new business," says Mr. Fitzgerald. "That's what it's all about — maintaining the business we have now and bringing in new business. That would mean more work — for the port, the steamship lines, everyone — and more man-hours for the ILA."

"Everyone involved wants to see Barbours Cut Terminal do well," Mr. Fitzgerald adds. "To do that, we have to serve the customers. The ILA realizes that, and we want to do our part."

Road Traffic Only

The new hours apply to road traffic operations only. The hours for vessel

operations were not changed. Operating on the new schedule are the terminal's main entry gate, the empty container yards at Berths 1 and 2, yard crane operations, the bobtail/chassis yard and the customer service and booking office.

Some steamship lines have decided to staff their offices during the two extra hours, Mr. Jamison says, but it is not feasible for all lines to do so.

With the flex-time arrangement, a cross-section of the terminal's staff — including some managers, yard crane operators, CRT operators, customer service personnel and clerks — now work from 7 a.m. to 4 p.m. Employees on the early shift will go to lunch from 11 a.m. until noon then work through the traditional lunch hour from noon until 1 p.m. The remainder of the terminal staff work from 8 a.m. to 5 p.m.

Benefits to Truckers

Under the old schedule, truckers arriving before 8 a.m. waited outside the terminal until the entry gates opened; by 8 a.m., lines of trucks had formed. A similar situation occurred during the noon-to-one lunch hour; some trucks were locked inside the terminal, and trucks outside the terminal could not enter until 1 p.m.

For some truck drivers and truck operators, the expanded hours and reduced waiting time may mean a chance to expand their profit margins.

"We average from 700 to 800 truck calls a day. The new schedule will save a lot of man-hours for truck drivers," says Mr. Jamison. "The expanded hours will give some truckers an opportunity to make an extra move or two during the day, if they choose."

A Good Investment

To further facilitate traffic, the customer service and booking office at Barbours Cut Terminal has been moved to the chassis yard, which is just beyond the main gate entrance. The relocation removes truckers who need assistance from the main traffic flow at the truck entry gates.

Mr. Jamison sees the longer hours as a wise investment, a cost-effective way of responding to the needs of port users. Port operators must understand that better service, not bigger facilities, is sometimes what the shipper needs most.

"Of course, we are expanding the

terminal facilities and purchasing new equipment for Barbours Cut Terminal, but physical expansion is not enough," Mr. Jamison says. "We have to look at ways to expand and improve our services and to better utilize the facilities we have. That is what we hope to achieve with the new schedule."

"The return on our investment will be the growth of the entire shipping community." *(Port of Houston)*

\$200 Million Plan Helps Modernize New Orleans

The bellow of a ship's horn, the rumble of a tugboat's engine, the whirl of cranes loading containers, the whoosh of air brakes as trucks move in and out of the wharves — these are the sounds of a busy port. But these days, another sound is becoming more familiar along the New Orleans riverfront: the pounding of a pile driver.

The pile driving and other sounds of construction are evidence of progress in the Port of New Orleans' \$200 million capital improvement program. The program, now entering its third year, is helping modernize the Port and prepare it for the shipping needs of the next century.

To date, 11 major projects have been completed, six are under way and 25 additional projects are awaiting development. When complete, the five-year reshaping program — which gives special consideration to neobulk, breakbulk and containerized cargo needs — will give the Port three new super terminals, a new flood control system at the France Road Container Terminal, improved truck and rail access, and infrastructure improvements throughout the Port.

"We've spent roughly \$60 million and have close to \$67 million set aside for various projects that are underway," says Mr. Paul Mayeaux, deputy director of engineering and construction for the Port. "And so far, for the most part, we're on schedule and on budget."

Completed Projects

Completed projects include site preparation for the Nashville Avenue Terminal Complex. When finished, the complex will encompass 3,150 linear feet of heavy-duty wharf and 32 acres of marshaling area between the Nashville and Napoleon Avenue wharves.

Offering about 141,000 square feet of new shedded area, the Nashville Avenue Terminal Complex is designed to be a multipurpose development, with container crane capabilities and rail service at the front and rear of the wharf.

The complex will link two of the Port's busiest wharves, Nashville Avenue and Napoleon Avenue, into one super terminal. Completion of the first wharf and shed is targeted for August 1993 and total construction at the site should be complete by April of 1995. The new dock connecting the Nashville and Napoleon Avenue wharves will create a continuous quay stretching from the Henry Clay Avenue Wharf to the Milan Street Wharf, a distance of over two.

Also completed this year was the Harmony to Louisiana connecting wharf designed to bridge the gap between the Harmony Street and Louisiana Avenue wharves. The link makes it easier for one operator to use both facilities and creates additional berthing space. The Harmony Street-First Street Terminal is being developed to meet the special needs of steel and neobulk freight.

The Jourdan Road RO/RO facility was also finished, as well as some portwide terminal improvements. Overall, \$1.4 million in portwide improvements, consisting of road, access, signage and landscaping projects, are planned.

Port Improvements Under Way

Work continues on all Port projects, as well as the Tchoupitoulas Corridor project. The corridor project is a joint venture between the city of New Orleans and the Port and is designed to improve the flow of traffic to and from the Port's wharves. The project will create additional lanes exclusively for Port-related traffic.

The Napoleon Avenue downstream extension project, which will extend the wharf 200 feet out into the Mississippi River, is under way with the completion of the geotechnical investigation as well as the test pile design. Construction on this project — which has been moved up in anticipation of relinquishing control of downtown wharves — is set to begin in July 1993.

The Louisiana Avenue terminal improvements include tearing down the existing shed and building a larger one, plus additional paving in the area.

Seventy-five percent of the design is finished and construction of the shed should start in September 1992. The Louisiana Avenue Multipurpose Terminal is being remodeled to make it more attractive to ocean carriers handling container, breakbulk and neobulk cargoes.

Also under way are portwide railroad track improvements, which are part of the Strategic Rail Plan. In conjunction with the \$1 million railroad track enhancements, electronic data interchange (EDI) and rail car management systems are currently on line and undergoing refinement.

Construction of a proposed intermodal container transfer facility (ICTF) is also being examined. The ICTF would help centralize the Port's dynamic intermodal activities to ensure faster, more effective and more efficient movement of cargo via New Orleans.

Other capital improvement projects that have reached the design stages include plans for a new board office building and improvements totaling \$14 million to the France Road roadway whose entrance to the terminal area on the north end is 90 percent complete.

Project Additions

As the capital improvement program proceeds, Port planners continue to introduce new projects designed to meet the changing needs of the transportation community.

New ventures include the Central Business District riverfront development and a series of improvements in anticipation of the introduction of riverboat gaming. Riverfront development includes construction of a temporary cruise terminal, to be located at the Julia Street Wharf. Port staff has finalized negotiations with the cruise line and has begun terminal design. Parking lot construction is due to start next month.

The Cold Storage Facility is another project addition. Site and cost analysis, as well as a time study on the development of the on-dock cold storage warehouse, have been completed.

As future needs are identified, more projects will be added. "The Port's here to help shippers and others in the maritime industry," explains Mr. Mayeaux. "The capital improvement program is designed to keep us competitive well into the next century. Judging from the progress we've made

so far, it looks like we're well on our way." (1992 - 1993 Annual Directory)

Port of Redwood City to Import Mexico Gypsum

The Board of Commissioners of the Port of Redwood City on February 10 approved an agreement with Compania Minera Huajicari and Pacific Basin Resources to import a minimum of 150,000 tons of gypsum rock annually from quarries in Baja California, Mexico.

"It is significant that as the North American Free Trade Agreement is being considered for ratification, we have joined with this prestigious Mexican company to increase trade," said Port Board President Guy Smith.

Compania Minera Huajicari owns the largest privately owned gypsum production facility in Mexico. The gypsum plant at Santa Rosalia in Baja California is an open quarry that can produce at least two million tons per year, according to company president Armando Guardiania Tijerina. The quarry has proven reserves of 30 million metric tons.

Gypsum is a non-metallic, fire-resistant rock used in industry and as a building material in products such as wallboard and cement. It also is used in agriculture to counteract black alkali in desert soil and irrigated areas.

Pacific Basin Resources in Pleasant Hill, whose owner is America Cup Skipper Bill Koch, serves as Compania Minera Huajicari's exclusive West Coast marketing firm. Pacific Basin Vice President Larry Black said the Port of Redwood City provides the Mexican firm with an ideal location to expand its West Coast business.

The facility will occupy almost two acres near Wharf 3. Portable conveyors provided by the company will be positioned between Wharf 3 and the leased area to handle gypsum rock from self-unloading ships. Upon unloading at Wharf 3, the gypsum will be stockpiled for subsequent load-out onto trucks and possibly rail. The new bulk cargo will represent a significant increase in the Port's overall annual tonnage, said Port Executive Director Floyd Shelton.

"With the potential for more business between Mexico and U.S. under the North American Free Trade Agree-

ment, we see this relationship with Compania Minera Huajicari and the Port of Redwood City as an excellent opportunity to enable us to create new markets," said Mr. Black.

Eventually, he said, it is the goal to import gypsum to Redwood City and use the vessels on the "backhaul" to transport other dry bulk cargoes from the region to Mexico, Canada, Japan or other destinations.

After oil and tourism, the mining industry is the third-best foreign currency producer in Mexico, according to Compania Minera Huajicari President Armando Guadiana Tijerina. He said his firm's gypsum reserve represents two percent of the total proven gypsum reserves in the world.

The Compania Minera Huajicari operation is basically a simple mining operation that is designed for maximum production. The shiploader operates at a 1,100 metric ton per hour capacity, and will soon increase to 1,250 mtph. This pace allows the company to load 30,000 metric-ton ships in 24 hours.

"Most of the gypsum we mine is used for wallboard," said Mr. Guadiana. "The leading wallboard manufacturer in Japan buys from our quarry. Our market area includes the U.S. Gulf and the West Coast. We are excited about expanding our market by entering this agreement with the Port of Redwood City.

Port of Seattle Issues Refunding Bonds

The Port of Seattle Commission approved the sale of \$82.4 million of Junior Lien Revenue Bonds, proceeds of which will be used to refund the Port's outstanding Series 1973 and 1976 Senior Lien Revenue Bonds.

The refunded bonds were originally issued to refund prior Port obligations issued to finance Marine terminal development and improvements at Seattle Tacoma International Airport during the early 1970's.

In completing the refunding, the Port was able to take advantage of current low interest rates. The new issue carries an average coupon of approximately 4.5 percent, compared with approximately 5.7 percent for the refunded bonds. As a result, the Port will achieve total projected debt service savings of nearly two million dollars over the life of the issue.

Africa/Europe

Le Havre to Contribute To Better Productivity

The conference recently held under *Port Data Systems* in Paris brought together all those most closely concerned with Electronic Data Interchange in Europe, under the patronage of EDIFRANCE and with the backing of the Commission of the European Communities and the United Nations Economic Commission for Europe.

EDI simplifies and facilitates the exchange of information between companies and increases the efficiency with which trade, and particularly international trade, can be carried on. It is also of value in monitoring and controlling the movement of goods, payments, and so on.

Commerce, banking, insurance, Customs and transportation are all associated under the auspices of the United Nations and the Edifact Board in the task of furthering international standardisation. Naturally, the Port of Le Havre is also closely involved in a technology that so much affects international trade and the carriage of goods by sea.

So far as the elaboration of messages is concerned, the Port of Le Havre, as a member of EDIFRANCE and EDI-TRANSPORT, heads working parties dealing with the vessel loading plan known as Bayplan, as well as with manifests, dangerous goods and the monitoring of containers.

At the European level, the Port of Le Havre is also a member of PROTECT, which groups together Rotterdam, Antwerp, Hamburg, Bremen and Felixstowe for the computer-assisted processing of documents and declarations relating to dangerous goods.

Internationally, the Port of Le Havre is a member of TCIEG (Transportation Community Information Exchange Group) in which Canadian and Australian ports, and many ports in the USA, together with Rotterdam, Hamburg, Felixstowe and Le Havre work together for the furtherance of EDI.

The strategy followed in the field of electronic data exchange has the twofold aim of:

— Firstly, providing the port's cus-

tomers, i.e. owners and shippers, with facilities for communicating and exchange information on the planning of vessel calls and the movement of goods (for the most part containerised)

— Secondly, bringing all those in the port professions closer together through the use of automated data exchange procedures.

The facilities set up in Le Havre, combined with a determination to be in the forefront of developments, will contribute much to the current drive for greater productivity and competitiveness, so essential in the Single Market of 1993.

(Port of Le Havre Flashes)

BLG Reorganizes Its Corporate Structure

As of January 1st, Bremer Lagerhaus Gesellschaft (BLG) has reorganized its corporate structure into three divisions. They are Container Operations, Breakbulk & Special Commodities and Partnerships. Each division will be a separate profit center, with full responsibility for sales, marketing and operations, including personnel, facilities and equipment.

"As one of the leading port operating companies in Europe with almost 3,700 employees, our objective is to streamline all company resources and operations to bring them in line with the ever-changing structural and cyclical economic conditions here and abroad," says Dr. Rolf Fastenau, Chairman, BLG. "In this way, we are strengthening the competitive position of BLG and the Ports of Bremen/Bremerhaven to ensure considerable future growth." He added that container traffic via the twin ports increased by almost 5%, to more than 1.3 million TEUs in 1992.

Executive Responsibilities

Several new executive appointments have been assigned to meet the demands of the new corporate structure. Dr. Guenter Boldt, member of the Executive Board of BLG, will head the Container Division, which includes the container operations in Bremen and Bremerhaven.

Dr. Dieter Naumann, also a member of the Executive Board, will be responsible for the Breakbulk & Special Commodities Division, including distribution, warehousing, automobile handling, general breakbulk cargoes

and the banana terminal (Bremerhaven is one of the busiest terminals for banana import in Europe).

Mr. Hans H. Poehl, Deputy Chairman of the Executive Board, will be in charge of the Partnerships segment, which is responsible for all BLG subsidiaries and joint ventures with other organizations.

Container Traffic Growing in Hamburg

For Hamburg's seaport economy 1992 was not quite as successful as expected. The total volume of cargo handled, 65.1 m t, was slightly less than the 1991 total of 65.5 m t. However, this was a very respectable result in view of the stagnant state of the world's leading industrial nations.

Hamburg successfully defended its position as the world's seventh-largest container port, remained second only to Rotterdam in the European league and strengthened its position as Germany's largest seaport.

Containerization marches on in the Port of Hamburg. The rate of containerization — the weight of loaded containers as a percentage of total general cargo — increased from 71% to 74.5% in 1992. However, in terms of total container traffic, 1992 was unable to follow the double-digit

growth figures of previous years (1986-1991 saw an increase of 76%).

In 1992 the volume of container traffic rose by a "mere" 5.2% from 21.4 m t to 22.5 m t and, in TEU terms, from 2.189 m to 2.262 m (up 3.6%). However, Hamburg's port economy is confidently sticking to its goals for 1993 and 2000: 2.4 m and 4 m TEUs respectively.

Hamburg's significance as a Main Port in Europe grew again in 1992. On nearly all the trading routes (the Far East, Middle East, India, Eastern Mediterranean, North and South Africa, North and South America, Australia and Scandinavia) there were more frequent departures on existing container liner services or new services were introduced (e.g. Maersk and Hyundai Merchant Marine).

The bulk-cargo sector did not present a uniform picture in 1992. Suction cargoes (grain, fodder and oilseed) continued to develop favourably but the upward trend in grabber cargoes (mainly due to increased exports) slackened off. Exports of petroleum products and imports of crude oil fell off dramatically, a result of the re-opening of a refinery in Wilhelmshaven — and this pipeline is preferred, for environmental reasons, to transportation by sea down the Elbe. In all, the volume of bulk cargo handled was slightly down on the 1991 figures (1.8% less at 34.9 m t).



Container ship arriving in Hamburg with the city's famous skyline in the background

Cork Ferry Terminal: New Berthing Dolphins

On 28th October, 1992, the Port of Cork signed a Contract for the installation of new berthing and mooring dolphins at the Ringaskiddy Ferry Terminal. The Contract was awarded to Ascon Limited, Kill, Co. Kildare. The project is the first step in a programme of works to upgrade the Ferry Terminal at Ringaskiddy to accommodate the new generations of "Jumbo" Ferries.

Work on the Contract, valued at £1 million will commence immediately and will be completed by the end of February. The project has qualified for 50% E.C. funding with the balance coming from the Commissioners' own resources.

In recent years, the Port of Cork has recorded impressive growth in Ferry traffic to the U.K. and the Continent and 1993 will see a substantial increase in Ferry capacity to the Continent when Brittany Ferries will introduce their new Jumbo Ferry *Val de Loire* on their weekly Cork to Roscoff service.

Britanny Ferries will offer two sailings per week from Cork to Roscoff next year and will offer a new weekly service from Cork to St. Malo.

Irish Ferries will double their capacity from Cork with the introduction of a new weekly Cork to Cherbourg service in addition to their existing Cork-Le Havre sailings.

Swansea Cork Ferries will continue to operate up to seven sailings per week on the Cork to Swansea route.

The Contract, when completed, will ensure the Port of Cork continues to be the only Irish Port capable of handling Jumbo Ferries in all weather conditions.

Lisbon Trophies to Year's Best Customers

Following on the series of events which it has been promoting to draw more attention to the port of Lisbon and market its potential with those shipping agents who are directly or indirectly connected with it, in 1992, the Port Authority continued to keep a record of the biggest customers each month, and published their names in the two magazines, "Porlis" and "Port of Lisbon News", which are regularly

distributed to shipowners and carriers throughout the world.

The climax of his scheme took place at a ceremony held in the Almada Negreiros Hall, at the Alcantara Passenger Dock, during which the Authority of the Port of Lisbon presented trophies to the best customers in 1992.

The chair was taken by the Deputy Secretary of State and for Fisheries, Mr. Prates Bebian, who was joined on the podium by the President of the Authority of the Port of Lisbon, Mr. Alfredo Conceição Rodrigues, the President of the Coordinating Committee of the Portuguese Carriers Association, Mr. Higinio Queiroz e Melo, the President of the Portuguese Association of Shipping Agents, Mr. Mário da Rosa Lopes and the Chairman of the Board of the National Association of Port Operators, Mr. António Beirão Belo.

The following companies were awarded prizes for 1992:

D.A. Knudsen & Co., Ltd., Liscont, Otto Wang, CSA, Listrafego, SPC, T&M, Operlis, Socarpor, A.J. Gon-

calves de Mores, Socarmar, Listagus, Navigomes-Vasuardiaz, and James Rames & Co., Ltd.

UK Major Ports Group Formed by 7 Operators

Seven of the country's major port operators have announced the formation of a new independent organisation, to be known as The United Kingdom Major Ports Group Limited. The seven, which handle over half of the UK's total seaborne trade, are: Associated British Ports, Belfast Harbour Commissioners, Port of London Authority, Medway Ports Limited, The Mersey Docks & Harbour Company, Tees and Hartlepool Port Authority Limited and Port of Tilbury London Limited.

The Group has been formed to promote the interests of the larger ports at a time when the structure of the industry is changing, and new opportunities are being created by the Single European Market. The Group will take

a particularly close interest in proposals for changes in public policy in relation to inland and maritime transport which would affect the interests of its members and their customers. The Group has joined the newly-formed European Community Seaports Organisation.

ABP: Further Investment In Hull's Alexandra Dock

Associated British Ports (ABP) is to invest £1.2 million in restoring the inner and outer lockgates at Hull's Alexandra Dock.

Work will start in March and will be completed by the end of 1993. The contract to restore the lockgates to full operating condition will be put out to tender.

The new lockgates will mean that coastal and short-sea vessels will be able to berth at Alexandra Dock with far less emphasis on tidal restrictions.

Alexandra Dock was re-opened by Sir Keith Stuart, ABP Chairman, in July 1991, having been closed for most of the previous decade. Since its re-opening, over 500 ships have visited the 190-acre dock where demand for additional facilities continues to increase. Alexandra Dock can accept vessels of up to 153 metres in length, 23.7 metres beam and 7.9 metres draught at high water (MHWS).

Cargo throughput and demand for new facilities is running at record high levels at ABP-Hull. In spite of the UK recession, the introduction of new and efficient working practices, following the abolition of the National Dock Labour Scheme in 1989, has resulted in the port enjoying a boom in trade.

Mr. Mike Fell, ABP's Hull Port Manager, commented:

"This additional investment will enable the full potential of Alexandra Dock to be realised and is another significant development at the port of Hull. The present access for vessels at high water will be greatly extended, permitting shipping movements for at least 12 out of every 24 hours.

"This substantial improvement will present shipowners using the River Humber and its tributaries with a new opportunity to berth coastal and short sea vessels of up to 7,000 dwt with the minimum of tidal restrictions and avoiding the need to take the ground at low water.



New Terminal Tractors in Gothenburg

The Port of Gothenburg has taken delivery of six new terminal tractors. The machines are the first ones in a renewal scheme of 16 terminal tractors to be completed in 1994.

The six machines, four SISU and two Kalmar LMV, are being put to work in the Tor terminal, the Port's main roll on/roll off facility. Cargo handling in the Port's Skandia container terminal relies entirely on straddle carriers and top-lift counterweight trucks.

All the new machines feature all-wheel drive, 30-tonne king-pin capacity, and automatic gear-boxes. They also have catalytic exhaust gas purification and exhaust particle filters. All machines have been fitted with trans-lift control packages, since much of the work in the Tor terminal consists of handling Ro-Lux cassettes.

ABP R&C Moves to Southampton Centre

ABP Research & Consultancy Ltd (ABP R&C), a subsidiary of Associated British Ports Holdings PLC (ABPH), has moved to a new purpose-built research centre at Pathfinder House in Southampton. The new laboratory, situated adjacent to Ocean Village, became operational in January this year.

In addition to providing a complete maritime civil engineering service to Associated British Ports' 22 ports, ABP R&C undertakes investigations for other ports, consultants, contractors, local authorities, water companies, the National Rivers Authority and Government departments.

Services offered by ABP R&C include physical modelling of ports and their approaches, marinas, jetties, locks, bridge piers, water intakes and outfalls. Modelling facilities, including two large basins and a wave flume, have been built in the new laboratory complex at Southampton.

The company has a numerical modelling capability, with extensive experience in computational studies of river and tidal problems, as well as nearshore and harbour wave climate prediction. The department has also developed software for simulating the logistics of port operations.

In addition to the company's expertise in modelling, ABP R&C undertakes site investigations and studies of siltation in dredged channels. A Hydrographic Survey Department, which undertakes surveys for model studies and site investigations, is also based at the new laboratory.

ABP Research & Consultancy Ltd was founded in 1951, and was previously based at Southall.

Asia/Oceania

Brisbane Car Terminal Open for Business

Brisbane's status as Australia's fastest growing capital city port received a major boost with the opening of a \$2.5 million vehicle processing compound at Hamilton on December 4, 1992.

The 2,500-vehicle terminal, built by the Port of Brisbane Authority (PBA) and Car Compounds of Australia Pty Ltd (CCA), will receive, process and distribute imported vehicles to Australia's east coast markets.

CCA is an Australian company, a joint venture between the Japanese shipping giant, Mitsui OSK Lines Pty Ltd and local transport group, TDG Car Carrying Pty Ltd.

Minister for Transport, the Hon David Hamill opened the facility at a function attended by government, business and port representatives including Mitsui OSK Managing Director, Mr Shigeo Tanaka, PBA Chairman, Mr Ian Brusasco, CCA Managing Director, Mr Don Elmer and TDG Australia Managing Director, Mr Ivan deJulia.

Mr Hamill said the significant private enterprise involvement in this car terminal highlights Brisbane's potential to become a major distribution centre for Australia's vehicle import trade.

"About 50,000 vehicles are imported through Brisbane every year," Mr Hamill said.

"This new facility is expected to add an additional 10,000 units to that total in the first year.

"Nissan vehicles are already processed through this compound, arriving at Queensland and New South Wales dealers between one and four days faster than the previous system.

"The PBA's receptiveness to commercial ventures such as this compound is also helping chart an outstanding course of growth for the port," Mr Hamill said.

In his address to the gathering, PBA Chairman, Mr Brusasco announced the Authority's decision not to increase its motor vehicle import charges for the next three years.

"We act as a trade maximiser, and if holding port charges generates trade and employment, we will follow that path," said Mr Brusasco.

(Brisbane Portrait)

Sydney Ports Joins Anti-drug Fight

The MSB Sydney Ports Authority has joined the Australian Customs Service Frontline initiative against the importation of illicit drugs.

Frontline is a program through which

Customs gains the support of key players in the transport industry for the detection of unusual or suspicious activity which might point to drug trafficking.

The Authority has much to offer in this vital fight and will add its full weight to the overall effort.

Staff will have access to information material as well as training in the identification of suspicious circumstances which could indicate drug-related activities.

The Authority is proud to be associated with Frontline and is actively co-operating in the drive to ensure a cleaner trade in legitimate cargo.

The Customs Service believes the commitment of the MSB Sydney Ports Authority will reinforce its own capacity to monitor Australia's major shipping trades for drug trafficking and other illegal activities and will strengthen Frontline's effectiveness.

(Rapport)

SOUTH PORT New Zealand Ltd

1992 HIGHLIGHTS

- Although total tonnage handled through the Port was marginally down on last year by 1.4% or 24,338 tonnes, the total volume handled at 1,690,913 tonnes is the second highest on record.
- Turnover as predicted was down 5.0% reflecting the reduction in forest produce exports and the reduction in port charges at the commencement of the year.
- South Port's net operating surplus before tax increased 12.25% on the 1991 result to \$4,057,695.
- The Consolidated South Port Group returned a healthy after tax trading result of \$3,190,196 representing a 12.7% return on Shareholders' Funds for the 12 month period.
- Overall group profit after tax, including some one-off extraordinary gains (associated with the acquisition of shares in SFCA Ltd) totalled \$5,409,654.
- Shareholders' Funds for the Consolidated South Port Group rose 21.6% to \$25.2m as at 30 September 1992.
- During the year South Port completed the acquisition of a 74.9%

Toward Development in Harmony with Industry,
Cargo Flow & Citizens' Lifestyles

PORT OF YOKKAICHI



Yokkaichi as sketched by a famous "ukiyo-e" artist, Hiroshige Ando, 160 years ago.

Yokkaichi Port has a long history. It was designated as an open port for international trade on August 4, 1899. Located almost in the center of Japan, with a hinterland containing Japan's major industries such as those producing automobiles, machinery and petrochemicals, the Port has easy access to the trunk highway networks to Tokyo, Osaka and other major destinations.

We at the Port of Yokkaichi are making vigorous efforts to further develop our container and reception facilities for new forms of energy as substitutes for petroleum and to expand the port functions to cope with rationalized transportation modes.

The Port of Yokkaichi, linked with the major ports throughout the world and Japan, looks forward to serving you. Come and use Yokkaichi Port!



YOKKAICHI PORT AUTHORITY

9-1, Chitose-cho, Yokkaichi, Mie Pref., Japan 510
TEL.0593-54-6677 FAX.0593-54-6675

shareholding in Southland Farmers Co-op Assn Ltd and a 56.6% shareholding in Invercargill Wool Dumpers Ltd. Both subsidiary companies traded profitably for the year ended 30 September 1992.

- The Directors are recommending a final dividend for the year of 5.376 cents per 50c share. The dividend will carry full imputation credits and be tax free to all Shareholders.

(The Bluff Portsider)

Ports Authority of Fiji Mission Statement

The prime purpose of the Ports Authority of Fiji is to provide port facilities and resources for the efficient handling of trade. In this, it has a long term perspective which includes the permanent provision of commercially effective port services and activities. At the same time, it will provide a truly competitive element of the regional ports system and it will develop and expand the facilities of the Ports from time to time to the extent this is eco-

nomically and financially justified. It will also exploit other commercial opportunities which provide for effective utilisation of its total resources.

On this basis, PAF will position itself as the leading provider of general cargo port services in the South Pacific Region apart from Australia and New Zealand. Believing that its customers' needs are paramount, it will systematically improve the quality and reduce costs of services provided to import and export customers. It will strive continuously to improve the productivity of all its resources including capital, and it will aim to achieve levels of performance which are comparable with efficient international ports providing equivalent services.

To achieve this purpose, PAF will develop a high standard of relations with the workforce throughout the ports. In addition, it will develop a shared commitment with its employees towards the elimination of productivity constraints and the provision of secure and fairly rewarded employment.

At all times the Authority will conduct its activities in a safe manner consistent with its responsibilities to

protect the environment of the areas in which it operates.

(Annual Report 1991)

Yokkaichi Port Authority in Profile

Yokkaichi Port Authority is a special public body established jointly by Mie Prefecture and Yokkaichi City on April 1, 1966 for the efficient administration and management of the port. The authority is comprised of President as the executive organ and the Assembly as the legislative organ. The presidency is assumed by the Governor of Mie Prefecture and the Assembly consists of 9 elected members: 5 Mie Prefectural Assemblymen and 4 Yokkaichi Municipal Assemblymen.

The land now used as berths, cargo handling areas, sheds, industrial sites, green zones, etc. is all reclaimed land from the sea.

The land reclamation work began in the 1870s and formed the foundation of the existing port facilities completed during the 1965/1975 period.



Japan Transcity Corporation

As one of Japan's top-level suppliers of sophisticated logistics services, we meet any of your logistics needs. Our services include warehousing, distribution, land transport, sea freight handling and transport, air freight handling, and international multimodal freight forwarding through our global network system.

- | | |
|--------------------|---|
| ● Established | July 12, 1895 |
| ● Capitalized at | 7,790 Million Yen |
| ● No. of Employees | 1,136 |
| ● Listed on | First Sections of Tokyo, Osaka & Nagoya Stock Exchanges |
| ● Head Office | 6-6 Chitose-cho, Yokkaichi, Mie, 510 Japan |

Japan Transcity Corporation

Telephone	Telefax	Telex
0593-53-5211	0593-53-5230	4948-179



Further land reclamation is planned to cope with the ever-increasing volume of cargoes handled. The scheme involves 88 hectares for use as berths and 87 hectares in the Ishihara Area.

An important project now under way is the environmental improvement of the port area. Emphasis is placed on public parks and green zones. To make the port center better known to citizens, exhibitions, panels, a miniature of the port and videotapes are used; and citizens are invited on a port cruise by ship in August, the anniversary of the opening of the port.

Port Facilities

- Container berth equipped with two gantry cranes
- Motorpool for car exports and car-shipping pier
- 14-meter-depth pier & a coal center
- Pier equipped with two pneumatic unloaders of grain
- 3 berths, 6 km off the shore
- Grain silos (grain storage and supply base for the central region of Japan)
- Wool center (storage of wool)
- Cold store-meat center (storage and processing of frozen foods)

Sister Port Sydney

Sydney is the largest city in Australia and is the center of its economy and culture. The Port of Sydney is well known as the largest of all ports in Australia and for its scenic beauty.

The Ports of Sydney and Yokkaichi have long been closely related with each other chiefly through the wool trade, and on October 24, 1968 they entered into a sister-port affiliation with a view to enhancing mutual friendship and prosperity. The Australian Pavillion in the Kasumigaura area and the Kangaroo Monument erected in memory of the naming of the main stress of the area as "Port of Sydney Avenue" on June 1, 1981 are symbolic of the ever-deepening friendly relations between Australia and Japan as well as between Sydney and Yokkaichi.

Terms, Conditions of Privatised KPA Service

Twenty-nine years after the Klang Port Authority (KPA) was established, nearly all its services will be taken over by the port's new operator, Kelang Port

Management Sdn. Bhd. and virtually all its employees will become private sector workers.

The latest privatisation exercise is the culmination of a process that began in 1986 when the port's container terminal was privatised and taken over by Kelang Container Terminal (KCT).

Six years later, the privatisation of the rest of the port services is about to become reality. As with the privatisation of the container terminal, KPA employees are assured of no less favourable terms and conditions of service than what they are enjoying now. And as with the first privatisation exercise, KPA employees are given three options:

Scheme A

Terms and conditions of service under this option are the same as that of the KPA's. Though employed by a private company, employees under this scheme will continue to be governed by the public service salary structure and all other conditions of service. Further more, they are not entitled to whatever benefits offered by the employer, for example, annual bonuses or company shares.

Scheme B

Those who accept this option will receive a 15 per cent increase in pay plus one salary increment.

Employees who are on the pension scheme and are 40 years and above on the date of privatisation will receive their gratuity upon signing for this option.

Pensionable employees who have reached the age of 45 (for women and lower rank firemen) or 50 (for men) will also receive their monthly pension payment in addition to their salary. Others will receive their pension upon reaching the mentioned age.

Staff under Scheme B will receive whatever benefits offered by their new employer.

As with all private sector employees, all KPA employees who join KPM will henceforth contribute to the Employees' Provident Fund.

Option C

This is for those who reject service with KPM. Pensionable employees who choose this option will be immediately eligible for pension and gratuity provided they:

- (a) are permanent employees

- (b) have been confirmed in their post
- (c) have served with the government for not less than three years
- (d) have been given pensionable status.

The following are some of the salient points of the terms and conditions of service offered by KPM.

Salary

KPM will, for the time being, maintain the public service salary structure under the recently implemented New Remuneration System until such time a new collective agreement is effected.

Vacation Leave

Vacation leave for employees will still follow the public sector's — from 20 to 35 days annually depending on grade.

Hours of Work

Office hours for administrative staff will remain unchanged:

8 am — 4.15 pm (Monday to Friday)
8 am — 12.45 pm (Saturday)

Lunch break on Friday for administrative staff: 12.45 pm — 2 pm.

Shift hours for operations staff:

First shift : 12 am — 8 am

Second shift : 8 am — 4 pm

Third shift : 4 pm — midnight

Insurance Coverage

Besides the mandatory SOCSO coverage for those earning \$2,000 and below, KPM will also provide a Group Personal Accident Insurance Scheme for all its employees.

Housing Loans

KPM will provide housing loans at subsidised interest rates for its employees.

KPA employees who join KPM upon privatisation will pay only 4 per cent in interest on housing loans. Those with KPA loans will continue to make repayments to KPA at the existing interest rate and terms.

KPM executives will be eligible for loans of up to five years salary or \$200,000, whichever is lower. Non-executive staff are eligible for loans of up to five years salary or \$100,000, whichever is lower.

The repayment period for housing loans is 25 years. For lower grade staff

who purchase or build low-cost houses, the repayment period is 30 years.

KPM also offers loans to its staff to purchase motor vehicles and bicycles — up to a maximum of \$30,000 for cars and \$3,500 for motorcycles. Interest rate for the loans is also at 4 per cent. The repayment period for new cars is 72 months and 60 for used cars.

Tonnage Bonus

KPM will maintain the existing tonnage bonus scheme until such time it is restructured to reflect productivity.

KPA Quarters

KPM staff occupying KPA quarters will be allowed to stay on at existing rate of rental for two years. Occupation of KPA quarters by KPM staff after the two-year period will be subject to negotiations between the company and KPA.

(Port Klang)

'Effective Management Of Port Operations'

Welcome Address by Mr. Goon Kok Loon, Deputy Executive Director of the Port of Singapore Authority

The Third Country Program was 1 - 26 February 1993, at the World Trade Centre Club, Singapore

Good Afternoon, Ladies and Gentlemen.

I am pleased to be here to officiate the commencement of the 3rd run of the Third Country Training Programme on "Effective Management of Port Operations". I extend a warm welcome to participants of the programme.

The Programme is jointly sponsored by the Japanese and Singapore Governments. The Japanese Government funds the Programme through the Japan International Co-operation Agency (JICA). The Singapore Government provides trainers and facilities through the Singapore Port Institute (SPI), training arm of the Port of Singapore Authority (PSA).

Initiated in 1990, this is the third time that the Programme has been organised by SPI. I am glad that the Programme has again attracted a good mix of

participants from the ports in the Asia-Pacific Region. A wide range of countries are represented here today. They are Bangladesh, Brunei Darussalam, Indonesia, India, Malaysia, Mauritius, Papua New Guinea, Philippines, Solomon Islands, Sri Lanka and Thailand.

The objective of the Third Country Training Programme is to promote regional co-operation through training and the sharing of experiences. During the next four weeks, you will have an opportunity to learn about PSA's management, operations and administrative systems. The Programme will include visits to PSA's operations departments. This will enable you to observe first hand, operational activities and to exchange ideas with your counterparts in PSA. I am confident that you will find the Programme informative and relevant to your work.

PSA has established a reputation for efficiency and high service levels. Today, Singapore is the busiest port in the world and a leading container terminal. Over the past 10 years, PSA's productivity has grown by an average of 14% per annum in terms of value-added per employee. The key factors which have contributed to PSA's success are our emphasis on long-range planning, investment in modern cargo handling equipment, extensive application of information technology in port operations, and last but not least, systematic training and development of our human resources.

The training function in the Port is undertaken by SPI. Through an extensive range of courses on all aspects of port management and operations, PSA has nurtured a multi-skilled and productive workforce. Our well-trained and disciplined workforce will ensure the Port's continued growth and competitive edge.

PSA's training activities have not been confined to our own staff. Since the 1970s, we have extended participation in SPI's courses to the local and regional port and shipping industries. We have also developed and organised customised training programmes for ports in Indonesia, Philippines, Oman, Mauritius and the People's Republic of China. To-date, some 60,000 personnel from the local shipping and port-related industries and some 3,300 overseas personnel from 55 countries have undergone training in PSA.

SPI will continue to expand training opportunities for port and shipping personnel. In this context, I am pleased to announce that SPI and the Maine Maritime Academy in USA have jointly developed a 5-module Diploma Programme in Marine Operations and Administration. Scheduled for August this year, the Programme will cover marine operations, shipping & port policies, management & administration, maritime safety and maritime law & insurance. I am confident that this new Diploma Programme will be well received by the local and regional maritime organisations as a means for upgrading the knowledge and skills of their personnel.

You may also be interested to know that PSA has recently invested in a full-mission shiphandling simulator at a cost of some \$10 million. The simulator which will be operational by the middle of this year, will be used for training harbour pilots and other marine personnel in vessel manoeuvres, navigational safety and related areas of expertise. The simulator will also be used for research and development studies in port development, design and other investigatory assignments. The simulator will enable us to expand our range of marine courses not only for PSA staff but also for personnel from the regional maritime industries.

In closing, I thank the Japanese Government for funding the Third Country Training Programme on "Effective Management of Port Operations" and look forward to more of such co-operative training ventures in the future. I also wish all participants a pleasant and enjoyable stay in Singapore.

PSA Projects Strong Container Growth for '93

PSA's preliminary figures show that the Port handled 7.56 million twenty-foot equivalent units (TEUs) in 1992 compared to 6.35 million TEUs for 1991. This represents a robust 19% growth over the previous year. Over the last 5 years, container traffic growth for Singapore has grown by 22%. PSA continues to project a positive growth in container traffic at 15 - 17% for 1993. According to reports, preliminary growth figures for Hong Kong show that it has overtaken Singapore as top container port with 7.7 million TEUs



Mr. Goon Kok Loon, Deputy Executive Director, PSA

being handled in 1992.

It is evident that Hong Kong is enjoying strong growth as a result of very active trade movement and strong economic growth in South China and North Asia. Hong Kong and Singapore are among the top five container ports in 1992 projected by Lloyd's List (November 1992) in its World Ports survey. The five are Hong Kong, Singapore, Kaohsiung, Rotterdam and Kobe. This reflects a strong growth in container traffic in the entire Asia-Pacific region.

Singapore's main hinterland for cargo remains the South-East Asian countries, particularly the ASEAN countries. The strong growth in container traffic through Singapore is likely to continue over the next few years given the robust performance of the ASEAN economies and Singapore's increased shipping linkages with South-east Asia, Indo-China, the Indian sub-continent, the Middle East and Australia. Intra-Asian shipping accounts for over 50% of Singapore's container traffic. Given continued positive economic performance in this region and with continued growth in our trade with our main trading partners, US (40%), EC (14%) and Asia (24%), PSA is confident that traffic volume will continue to grow. We are also seeing an emergence of newer markets in South Asia, the Middle East and Australia which will contribute significantly to shipping growth in Singapore over the next five years.

PSA does not view Singapore-Hong Kong port performance in zero-sum terms. Shipping is today a network of links, and all the ports in the region are part of this network which gives rise to the smooth flow of container traffic. Each is a service hub to a large and fast developing market with Singapore better located to serve the South East Asian and ASEAN markets, and Hong Kong for North Asia. "We congratulate Hong Kong for regaining its status as the top container port in 1992," said PSA's Executive Director, Cdre (Res) James Leo.

In view of the increased cargo traffic through and within the region, PSA continues to plan for the long term and build facilities ahead of the projected demand. Brani Terminal, when fully completed in 1994, will give PSA an additional container handling capacity of 4.8 million TEUs while expansion

and upgrading for Tanjong Pagar Terminal will provide additional 1.6 million TEUs storage capacity by 1995. Together, these 3 terminals will help PSA meet the projected capacity of 13 million TEUs by 1996. The development of a new terminal at Pasir Panjang announced by Prime Minister Mr Goh Chok Tong on 22 Oct 92 will commence soon. Spanning 30 years and planned in four phases, this new terminal will provide a container handling capacity of 36 million TEUs.

A \$20 million contract for a Vessel Traffic Information System was concluded last year to provide for enhancement to its radar based vessel tracking system. It will utilise expert systems to control PSA's marine resources and monitor our port waters for the safe passage of vessels in Singapore.

In the meantime, work on PSA's latest ultra-modern distripark, Keppel Distripark is well underway. This project which will offer 114,000 square metres of prime space for container freight stations operations and other value added services. The Keppel Distripark will be operational in late 1993.

In planning ahead, PSA will continue to up-keep its excellent track record of providing reliable, efficient and value-for-money container handling services, and enhance Singapore's status as a Global Port.

Singapore: Container Terminal Automation

The Port of Singapore Authority (PSA) will enhance its operating systems at its proposed container terminal at Pasir Panjang with the introduction of the latest automation technology. One of the plans underway is the Automated Guided Vehicle (AGV) System which will replace the present man-driven prime moves for transportation of containers in the port.

To ensure that the new systems meet PSA's requirements, consultancy services worth nearly two million dollars will be engaged in the following areas:

a) "Definition of Requirement" Study for AGV System

The PSA will be awarding a contract for S\$1,278,600 to the Dutch company, Industrial Contractors Holland (IC/h)

Logistics to conduct a "Definition of Requirements" Study for the AGV system on 21 Jan 93. The study, covering a period of 18 months, will look into the specific operational and technical requirements necessary for operating an AGV system in the port's environment. This study will recommend specifications for the purchase of prototype AGVs which will be tested at PSA's Brani Terminal.

The AGV system will reap substantial returns in manpower savings and higher productivity rates. PSA is constantly on the lookout for new technological innovations in container handling to maintain its position among the world league of ports.

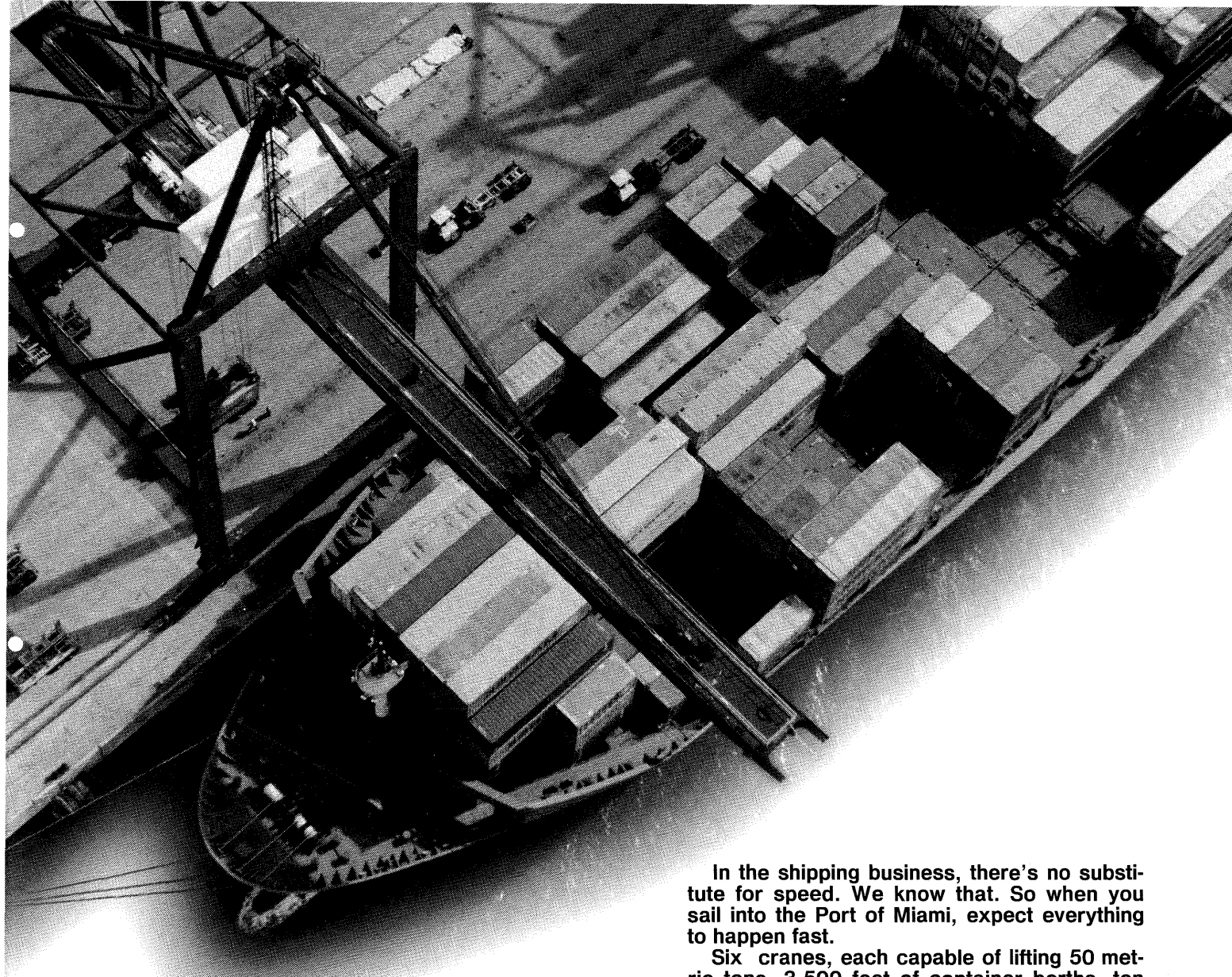
b) Simulation Systems

The PSA has recently awarded contracts worth about half a million dollars for consultancy services in simulation and purchase of hardware and software systems used for computer simulation. Computer simulation has evolved as a cost-effective and time suppressed method in assessing alternatives in developing new infrastructure and operating systems.

A contract worth \$317,000 was awarded to Auto Simulation Inc (ASI) to jointly build a simulation model for an AGV system with PSA. To enhance its simulation capabilities, PSA has also purchased an IRIS Indigo Graphics Workstation from Silicon Graphics and a simulation software package, Automod II Plus, from ASI, worth a total of \$223,000. These contracts will enable PSA to simulate different container handling systems and layouts in order to optimise its limited resources.

The needs of the community have been addressed in the development of the new terminal. PSA will be commissioning a traffic study to assess the impact of future port traffic on the roads in its vicinity. By inviting experts to review the traffic system, PSA, together with the Public Works Department (PWD), will be able to enhance the existing road network system to provide for smooth traffic flow in the vicinity.

PSA is committed to using the latest technology in planning for its new developments. With these new systems, port users can expect better and more efficient services. The needs of the community will also continue to play a significant role in the port's development plans.



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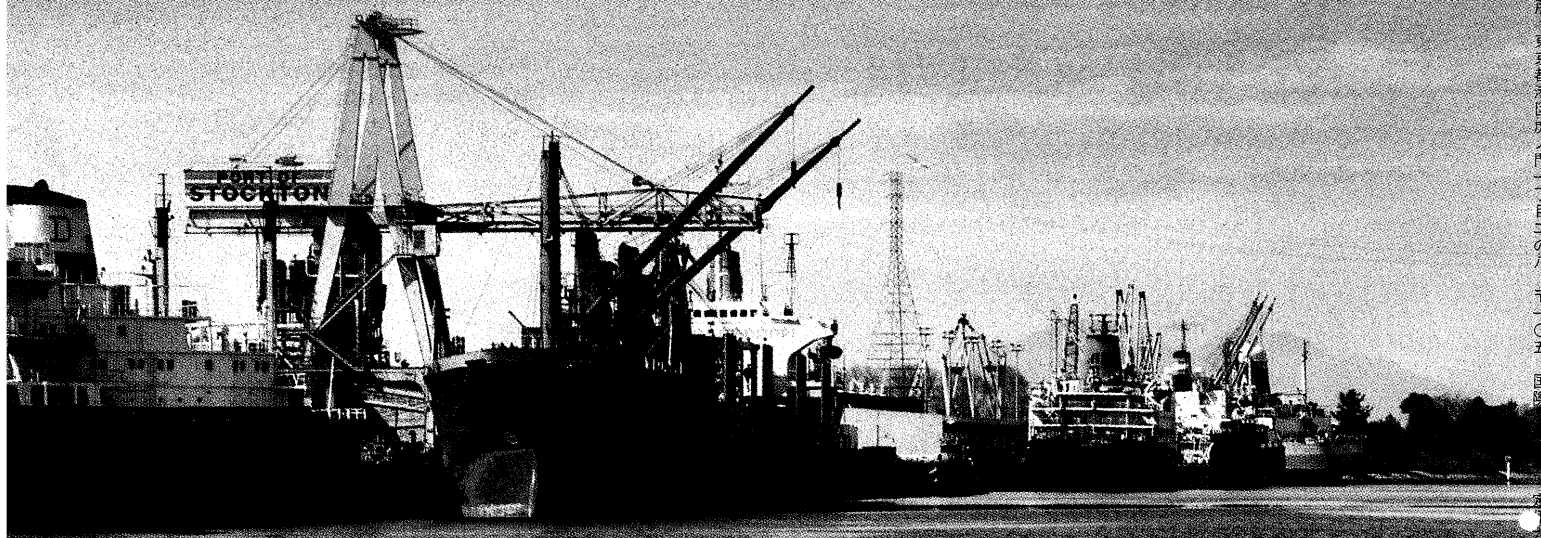
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