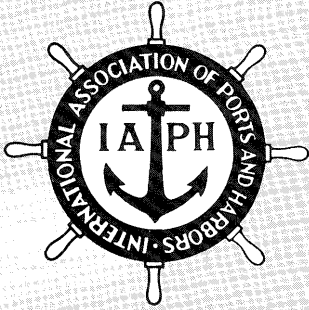


Ports &

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of
Ports and Harbors

July—August
1993 Vol. 38 No. 6



Harbors

18th IAPH World Ports Conference 17-23 April 1993 in Sydney

Guy Preffermann delivers his keynote speech.



Max Moore-Wilton, Conference Chairman (left) and Campbell Anderson, a keynote speaker.



IAPH officers and Board members pose for a group photograph at the close of the Sydney Conference.



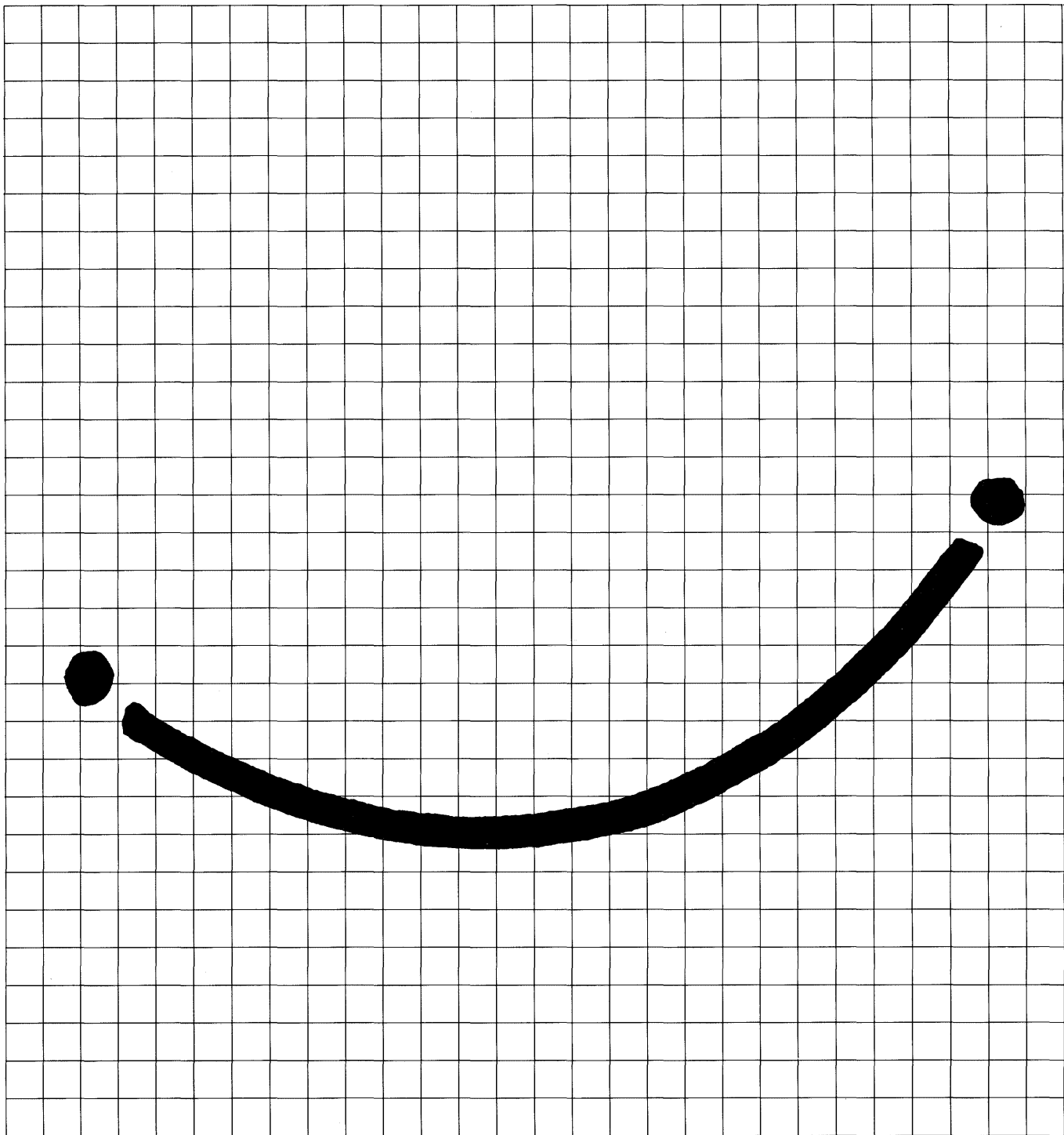
IAPH President John Mather (left) and MSB Chairman Andrew Turnbull.



Carmen Lunetta, new IAPH President



Cocktail party at the Australian National Maritime Museum



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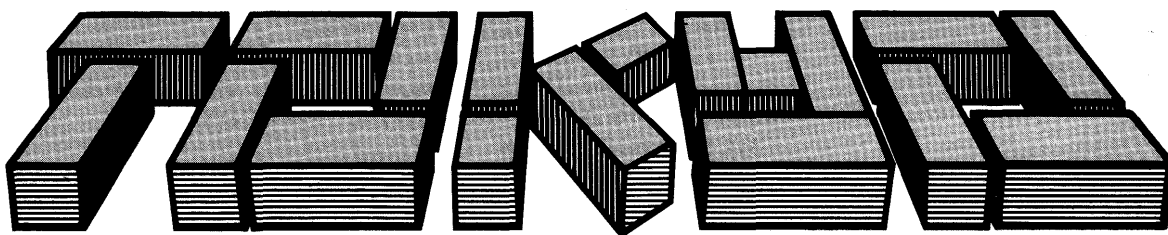
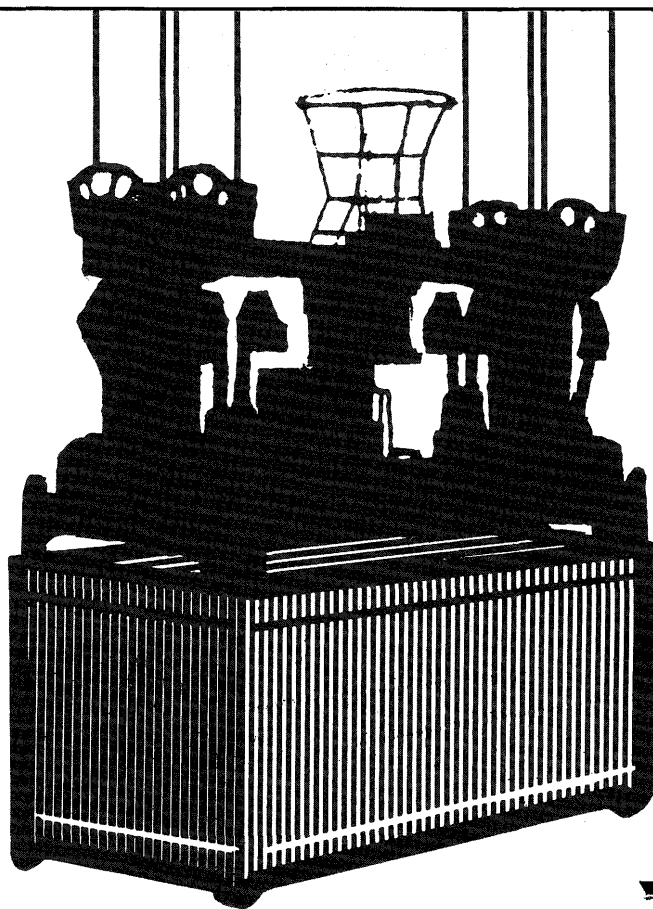
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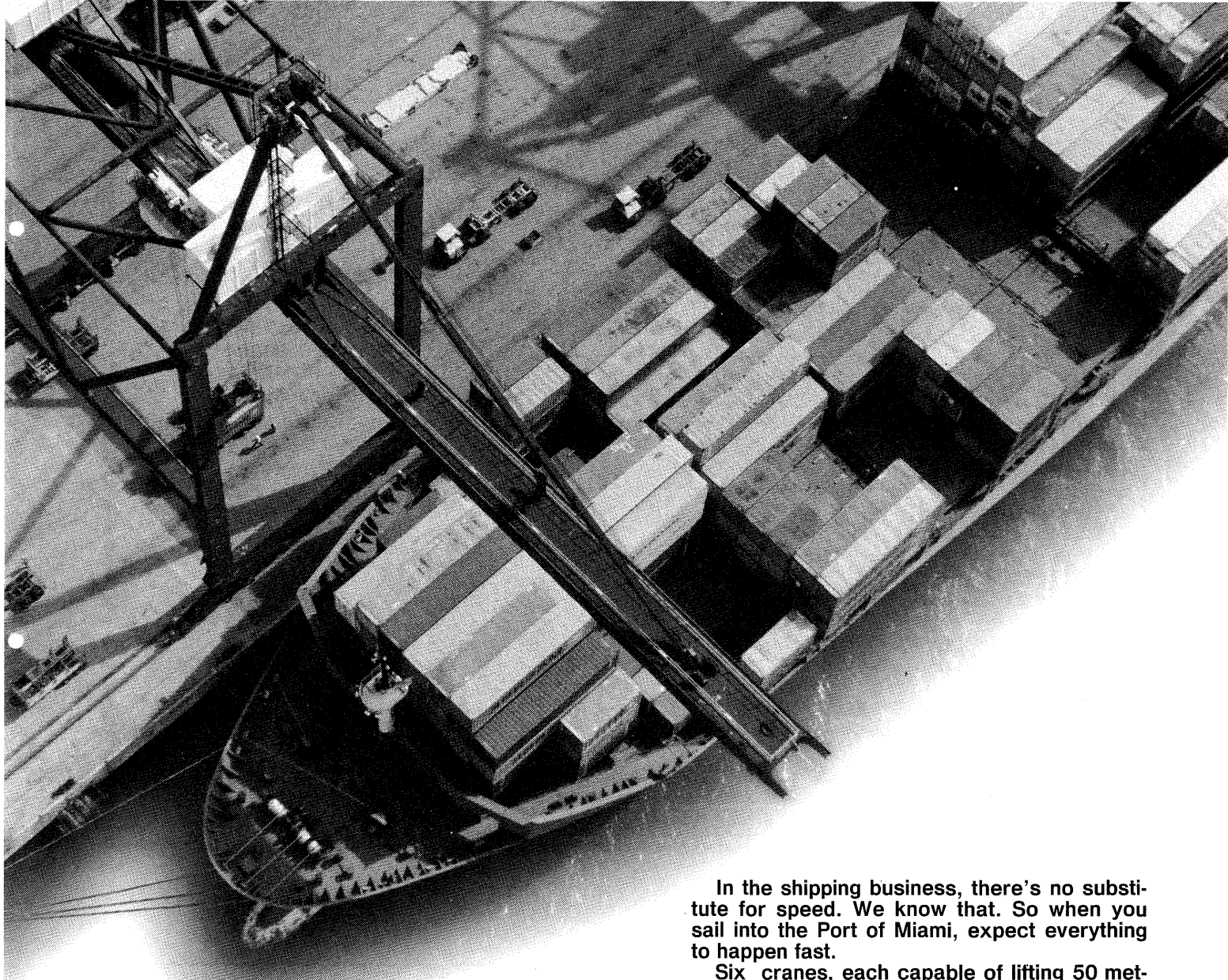
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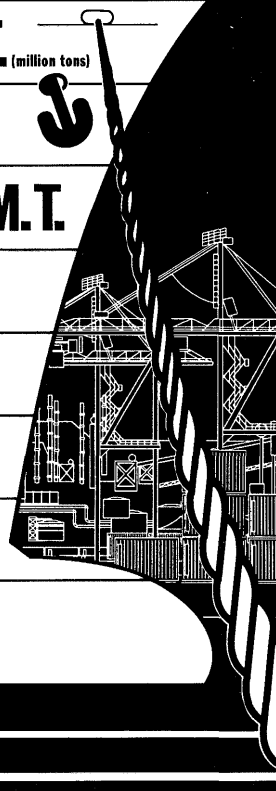
CONTAINERS 5 M.T.

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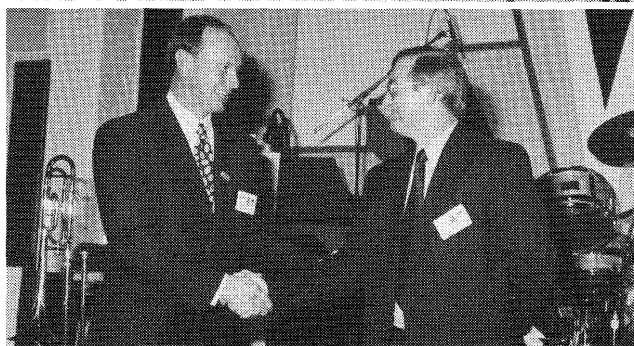
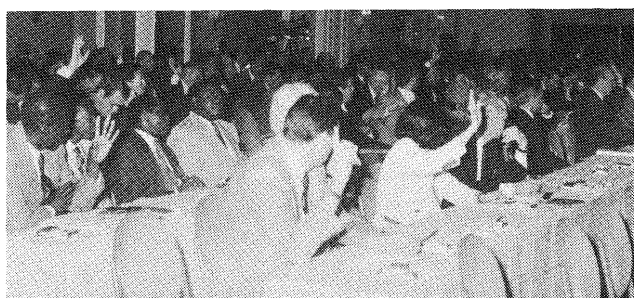
The 18th Conference in Sydney Sees the Fruition of IAPH Strategies to Increase the Benefits for World Ports

By Kimiko Takeda

Throughout the history of IAPH, our biennial conferences have played a significant role in determining the broad outlines of the course that the organization should take so as to ensure the maximum benefit for IAPH's worldwide members. Every conference has made a solid contribution to enhancing IAPH's value as a unique grouping of people who are responsible for the betterment of world ports as pivotal points for world trade. Since its inaugural conference held in Hollywood, California 38 years ago, IAPH has been fortunate to be able to hold a succession of these important events thanks to the initiatives taken by all the extremely generous hosts, such as the Maritime Services Board of NSW which acted as hosts for the recent Conference in Sydney. That event held in April, lived up to the high

standards of previous IAPH conferences, with exceptional business and social programs being arranged for all participants.

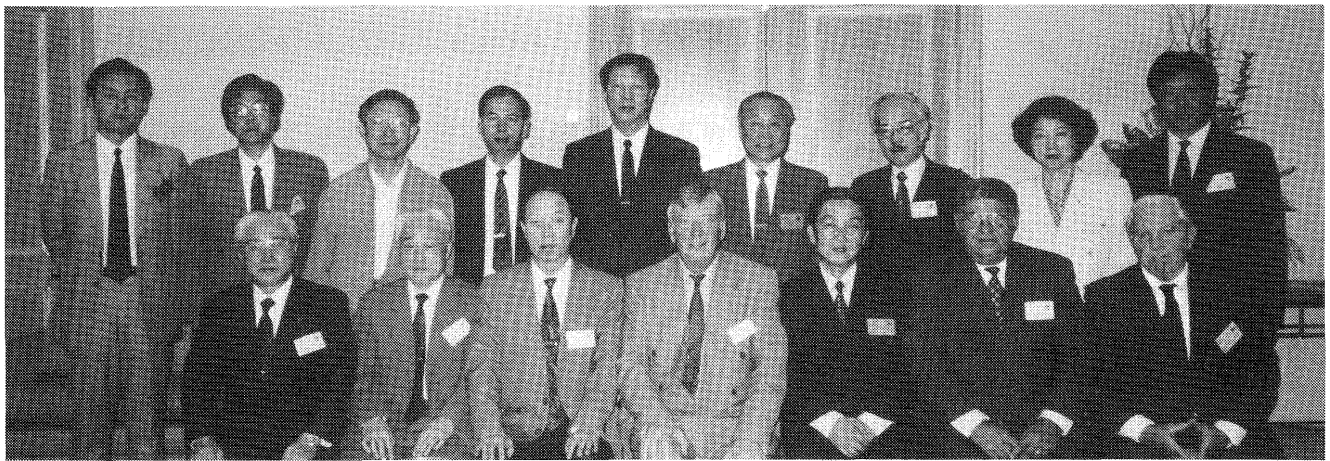
Perhaps not many participants are aware that Sydney's first bid to host an IAPH conference was made 16 years ago by Mr. John Wallace, the then Chairman of the MSB NSW, when the IAPH Board at the Conference in Houston in 1977 gathered to choose the host for the 1981 Conference to be held in the Asian region. However, Sydney gave way to Nagoya for the 1981 Conference and to Seoul for the event in 1987 and, with the Association's biennial conference returning to the Asian region once every six years, it was only in 1989 that Sydney's bid finally won the Board's approval enabling the MSB people to prepare to host this year's Conference. It behoves all of us who participated in



Mr. John Hayes (right) and Mr. Murray Fox, Managing Director, MSB Sydney Ports Authority jointly act as MC on the farewell night.



Mr. John Wallace, an IAPH honorary member and special adviser to the Sydney Conference, receives a plaque of meritorious service of long-standing, along with the other IAPH old-timers.



Chinese delegates pay a courtesy call on the IAPH officers and the Head Office staff in Sydney.

the highly successful Sydney Conference to express our sincere thanks and appreciation for the patience and understanding our hosts have consistently shown in keeping Sydney's invitation in effect until the time finally came for IAPH to hold its 18th World Ports Conference there.

The excellent arrangements that our hosts in Sydney made for the participants as regards both the business and social programs, could not have been better. In particular, the subjects covered at the keynote and working sessions which were organized using four full mornings and three afternoons — a total of 20 hours — provided highlights of the Sydney Conference. In an attempt to convey the essence of the presentations by the 26 speakers, we arranged for Dr. Peter Rimmer, a good friend of our Head Office from the Australian National University (Head, Department of Human Geography, Division of Society and Environment, Research School of Pacific Studies) to be present at the Conference and to prepare summaries of the respective sessions. Dr. Rimmer came up with reports synthesizing contents of the working sessions, which we introduced in the previous issue. In this issue, we are featuring further reports from Dr. Rimmer focussing on the keynote speeches, while his summaries of the respective presentations will be accommodated in the official proceedings of the 18th Conference, which are now being compiled by our Head Office staff for publication by October this year.

Also featured in this issue are article prepared by Mr. Neil Sinclair (Manager, Editorial Services, Lloyd's of London Press Limited), who again acted as our reporter following his participation in the two previous IAPH conferences in Miami and Spain.

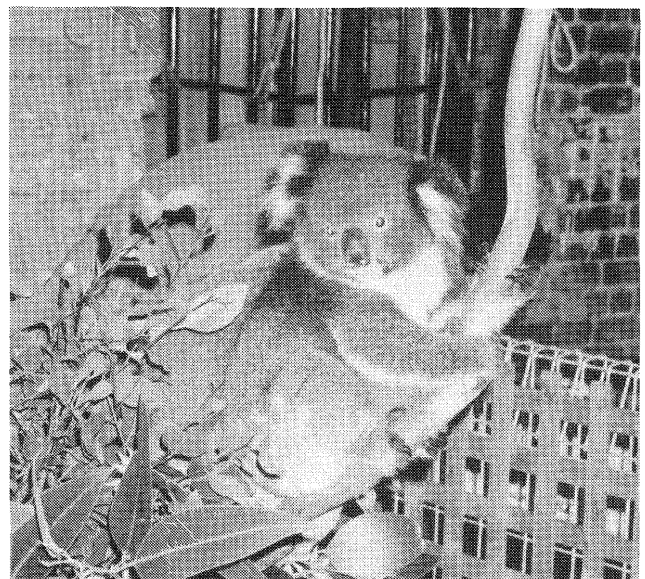
We hope that this special issue will convey the real atmosphere of the Conference, not only to those who gathered in Sydney but also to those who were unfortunately unable to be with us there.

As with previous conferences, the Sydney Conference added a new page to the history of our Association due to the indepth and wide-ranging nature of the topics discussed there. The zealous participants from various ports and harbors throughout the world gained valuable insights on their future roles in guiding their own ports and working environments to become more efficient and rational places for the benefit of all users and the citizens of their communities.

From one conference to another, IAPH has enjoyed the enthusiastic participation of its members, particularly

those from ports in the regions where the gathering took place. In Sydney, the participants from the ports in the Asian and Pacific regions outnumbered those from the other two IAPH regions, Africa/Europe and the Americas. Especially impressive was the number of newcomers from the major Chinese ports including Dalian, Shanghai, and Tianjin who were enjoying their first IAPH Conference with other participants from the other IAPH member ports which have been regularly represented at our conferences.

On the final day of the Sydney Conference, the new team of the Executive Committee was formed with 29 members under the leadership of President Carmen Lunetta to serve on IAPH for the new two-year term leading up to the Seattle/Tacoma Conference in 1995. The chairpersons for the 12 Technical Committees have been appointed by President Lunetta to guide the work entrusted to their fully restructured committees. The IAPH calendar is already focussed on the next Conference in Seattle/Tacoma in two years's time as we look back with pride on the numerous fruits of the Sydney Conference deriving from the strenuous efforts and commitment of the IAPH officers and members throughout the period which led up that gathering. We all know that our future success hinges on our joint efforts and that through such endeavours IAPH will further strengthen the collective interests of world ports.



Official Opening Ceremony

**from 16:00, Sunday 18 April
at the Sydney Opera House**

Address by

Mr. Max Moore-Wilton

Conference Chairman

Director General of Transport, NSW

Member, Maritime Services Board of NSW

Hon. Peter Morris MP, Right Hon. Lord Mayor of Sydney Ald. Frank Sartor, Hon. Bruce Baird MP, Mr. Mather, President of IAPH, Mr. Kusaka, Secretary General of IAPH, Distinguished Officers of IAPH, Delegates to the 18th World Ports Conference, Ladies and Gentlemen:

Good afternoon! My name is Max Moore-Wilton and I have the honor to be Chairman for this 18th World Ports Conference of the International Association of Ports and Harbors.

May I commence by welcoming you all to the Port and to the City of Sydney. I also have the pleasure this afternoon to act as your host and master of ceremonies.

It is therefore appropriate that I now outline to you the general arrangements for today's proceedings.

With me this afternoon are a number of distinguished guests whom I will shortly introduce, and who will address you as part of the formal portion of this Opening Ceremony.

Interspersed with these speeches, and by way of welcome, we have also arranged a number of musical items for your enjoyment.

Following these presentations in the Concert Hall, which will conclude around 6 pm, we will make our way outside to commence the evening program.

This evening program will include a cruise on Sydney Harbour, dinner on board and a return trip to Circular Quay concluding around 10 pm.

But for now, it's time for a musical interlude.

So I invite you to settle back, absorb the atmosphere of the Opera House Concert Hall, and again enjoy the singing of the Australian Girls Choir.

(The Australian Girls Choir sing the national anthem and other songs.)

Ladies and Gentlemen, as I said before, I am delighted to be here to welcome you to Sydney and to the 18th World Ports Conference of the International Association of Ports and Harbors.

I am particularly pleased that Sydney has been chosen as the venue for this notable event. As you know, the only previous World Ports Conference in Australia was held 24 years ago in Melbourne in 1969.

The Port of Melbourne, I might add, is one of Sydney's major trading competitors, but I am pleased to see that at last Sydney is gaining the upper hand.



Mr. Max Moore-Wilton

In any case, it is obvious that it is a long time between IAPH conferences in Australia, and we should all therefore make the most of this opportunity.

Sydney is Australia's largest city and in our eyes the most important. It is also now recognized internationally as a major world tourist destination and conference centre.

This IAPH Conference has attracted 500 delegates from the more than 80 member nations of IAPH as well as more than 200 visitors from all parts of the world, including extremely strong representations from the nations of the Asia-Pacific Region.

With the development of new international trading blocs, the Asia-Pacific Region is potentially very important to us in Australia.

It is largely within this area that our own long-term future lies as an exporter and a successful trading country. In a similar way, the Conference theme, covering the impact of global economic change, will be of vital importance to all of us, and the papers to be delivered will reflect the widest possible spread of expertise.

The speakers will share their experience and specialised knowledge in ways which I am sure will benefit all those attending.

With the growth in global interdependence, the work of IAPH is becoming more and more important.

The dynamics of today's international trade and the rapid march of technology make conferences such as this essential if one is to keep abreast of developments around the world.

I know you will find the Conference of immense professional benefit, but I hope you will also take time to enjoy our city's warm hospitality.

Having had the pleasure of attending the 17th World

Ports Conference in Barcelona, I realise that we have a hard act to follow.

Nevertheless, with the skill, dedication and enthusiasm of my Conference Organizing Committee, I am confident we can produce for you a conference you will enjoy and remember.

It is therefore my pleasure, as Chairman for the Conference, to extend to you all a warm Sydney welcome to this 18th World Ports Conference of the International Association of Ports and Harbors.

I also now have the pleasure to invite the Lord Mayor of Sydney, Alderman Frank Sartor to offer you his formal address of welcome to the city.

Address by The Right Hon. Frank Sartor Lord Mayor of Sydney

The Hon. Mr. Bruce Baird, the Hon. Mr. Peter Morris, Mr. John Mather, President of IAPH, our international visitors, ladies and gentlemen:

Welcome to this Conference and welcome to Sydney — Australia's pre-eminent port city!

To a landlubber the sea divides the world, but to a seaman it unites it. It is a great pleasure to see the world united by the sea today. I understand there are over 40 countries — from African to Iceland — represented here by port authorities!

You have chosen a fantastic spot to hold your Conference — this is an historic building on an historic site.

Sydney's first settlement was in this area and it was from this port that the Australian hinterland was opened.

To recognise our origins as a port city and to honour this site, we want to make this area — East Circular Quay — an area of the people.

The reason we held the ideas Quest last year, was to encourage the general public and a wide group of architects to help us find a good architectural solution for the site.

We believe we have done that. The result will be a hotel and retail complex that will be an area free from cars and a focus for all sorts of activities — residential, social and cultural — leading up to the Opera House.

Although Australians think of themselves as people of the bush, we were born from the sea and share our history with those who worked the Ocean.

Modern Australia was discovered by seamen, settled by a maritime fleet and originally governed by the navy.

Until as recently as WW2, we owed our very survival to seafarers. For decades, we relied on merchant shipping for all communication with the outside world; for transport of the colony's vital supplies and for maintenance of its trade.

Although we rely less on merchant shipping these days, the sea and Sydney life are still indivisible.

The boats plying their trade up and down the coast as well as between Australia and the rest of the world are essential to our economy. And the harbour is the hub of much of Sydney's sport and leisure.

Throughout history, trade and barter have meant communication between countries and sharing of the world's resources.

War and aggression rarely surface when trade connections are successful.

Harbour authorities around the world play an essential



Right Hon. Frank Sartor

part in the world's economy and in ensuring friendly and peaceful relations between countries.

Besides facilitating trade around the world, you also help to develop and enforce social policy.

You do a great service not only to your local cities but to the rest of the world, by your efforts to control illegal traffic in contraband goods such as drugs and native animals.

And you are at the forefront of more controversial issues such as the shipping of rainforest timbers and visits to our ports by nuclear ships.

It is a weighty responsibility. I don't need to remind you that the decisions you make on these issues go directly to the quality of all our lives.

Welcome again to Sydney! Please enjoy yourselves while you are here. Take advantage of some of the great attractions we have on offer. And don't forget to spread the good word about us when you go home.

Address by The Hon. Peter Morris PHR Chairman of the House of Representatives Standing Committee on Transport, Communications and Infrastructure

On behalf of the Government of Australia, I am pleased to welcome each of you to the 18th World Ports Conference.

I especially welcome our delegates from overseas. We hope you enjoy a pleasant and productive time in Australia.

We look forward to sharing your expertise and experience over the next few days.

This Conference provides an excellent opportunity for port authorities and maritime interests to discuss and exchange ideas on current problems, renew old friendships and make new contacts.

IAPH plays a key role in addressing a large number of current issues affecting ports from a global perspective.

It has successfully served as a forum by which members can present views and obtain information on the best means of contributing to the overall efficiency of ports worldwide.

The need for such co-operation is reinforced by the attention currently being focussed on the restructuring and reorganisation of port operations by many of the port jurisdictions represented at this Conference.

The theme of this year's conference, "Ports—The Impact of Global Economic Change", is a timely reminder of the

extent to which the changes that confront ports today across international boundaries.

As world production is increasingly internationalised, transport systems, of which ports are a key element, are undergoing important organisational, technical and commercial evolution.

Global competitive pressures are demanding greater efficiency and productivity. This places increased emphasis on the control and reduction of costs related to production and transport. Ports can no longer rely on the stable markets of the past. Recent years have seen dramatic changes to the traditional markets in which port authorities operated.

Competition between ports at both the national and regional levels is intensifying.

This can be attributed to myriad factors, including:

- The growth of trans-national companies;
- Worldwide effects of the recession;
- Improved land transport infrastructure;
- The development of intermodal transport; and
- New technologies in communications and cargo handling.

Ports within this environment must strive to be competitive in the cost and quality of services.

They can no longer afford to look inwards to their traditional national markets. They must increasingly adopt an international, outwards-looking perspective.

Australian ports, for example, need to be conscious of changes to shipping patterns in the Asian region, including the implications of feeder services via 'hub' ports, such as Singapore.

To share in the benefits of the global market, ports have to actively assess their operations and administration. They must market their services, learn from port users and increasingly orient their operations towards the users' perspective.

It is important for policy makers to realise the vital contribution that ports can make to improving economic performance and the standard of living.

Each nation's future prosperity depends heavily on its ability to improve its international trading performance. Port development and port performance should concern every organisation in the port community.

To benefit from their new role will require comprehensive support from governments, local municipalities, industry, trade unions, and employees.

In Australia the scenario is identical!

Over the past decade, the Federal Government has focussed on a massive reform program for our domestic transport industries, including the maritime industry.

Stevedoring has undergone a major transformation to double productivity in general cargo and container handling, more than halve labour levels and vastly improve ship turnaround times.

Cargo can now be moved across the Australian wharves with speed and reliability, equal to the rates achieved by our main trading partners.

Australia's handling of bulk commodities has also seen substantial improvements in efficiency and productivity such that our bulk handling capability is as efficient as any in the world.

In the last decade, Australian shipping has been reformed with crewing levels reduced by almost 40% and substantial investment in new ships, revitalizing a third of the trading fleet.

Australian port authorities and State Governments



Hon. Peter Morris, MP

operating them also are recognising their role in waterfront reform.

Port authorities are becoming more business oriented with an increasing emphasis on service efficiency and cost effectiveness.

As a result of the reform program there has been a significant change in the structure of the Australian waterfront.

The emphasis now is on building Australia's reputation for reliability, productivity and efficiency. Commercial and competitive processes are ensuring this change continues.

The Australian Government is committed to continuing reform in each transport sector while focussing more attention on improving the overall efficiency of the transport chain from origin to destination.

We plan to establish a National Transport Planning Task Force to provide a system-wide perspective on Australia's transport chain.

Specifically, the Task Force will investigate the adequacy of Australia's national transport infrastructure and institutional arrangements to meet future freight and passenger demands.

It also will examine priorities for national transport infrastructure investment into the longer term.

The overall aims include expanding the potential for competition between transport modes, improving the interface between transport sectors and determining national priorities in infrastructure investment.

The primary role of ports must be to facilitate trade and commerce.

They cannot be seen in isolation from the total transport journey and they should not be used as cows for hungry milck treasuries.

Port reform is not an end in itself but is vital to ensuring all countries have the ability to be effective, reliable traders on world markets.

Maximising efficiency inside the dock gates is of little consequence unless similar improvements are made outside the dock gates throughout the chain from warehouse to wharf.

International co-operation in sharing our knowledge is an important part of this process.

I am confident that the exchange of ideas that will occur at this Conference will provide a basis for further progress worldwide.

Again, on behalf of the Government of Australia, I bid you welcome to the Conference and I wish each of you success and satisfaction during your stay with us.

Address by
Hon. Bruce Baird, MP
Minister for Transport
Minister for Tourism, NSW
Minister responsible for Sydney's Olympic Bid

Hon. Peter Morris, MP, Right Hon. Lord Mayor of Sydney Ald. Frank Sartor, Mr. Mather, President of IAPH, Mr. Kusaka, Secretary General of IAPH, Distinguished Officers of IAPH, Mr. Chairman, Delegates to the 18th World Ports Conference, Ladies and Gentlemen:

First of all, may I welcome you to our city — we are honoured to have you here as our guests, and we will do everything we can to make your stay enjoyable and memorable.

Our weather is wonderful at this time of the year, and we hope you will take advantage of this and enjoy our spectacular scenic attractions.

Our setting today, the renowned Sydney Opera House, which recently celebrated its 20th anniversary, is universally regarded as one of the world's modern-day wonders and, with its waterfront site, provides the perfect venue for the launch of a conference such as this.

Four years ago, I gave my support and encouragement to representatives of the MSB who took to Miami a bid to host this 1993 World Ports Conference.

I recall the pleasure and satisfaction of hearing that the bid had been successful.

At very much the same point in time, that is, in April-May 1989, the NSW Parliament was debating legislation I had introduced to change the structure of maritime administration in this State.

Successful passing of the legislation resulted in the appointment of a new team of directors and managers for the Maritime Services Board.

In fact, the last four years have been a period of fundamental reform in ports across Australia and nowhere has this been more evident than here in New South Wales.

As the Minister responsible for ports, I can look back proudly on a list of achievements which have genuinely improved conditions for the users of the NSW ports.

Your theme for this Conference — "Ports — The Impact of Global Economic Change" reflects, in a broad way, the issues which have compelled the NSW Government to devote such energy to the improvements which have been occurring in our ports.

Australia, as an island continent, is critically dependent on the sea lanes which link it to the rest of the world.

Our future economic growth will be determined to a significant degree by the time and cost involved in transporting goods across the sea between our shores and others.

In a rapidly changing and increasingly competitive international economic scene, Australia's ports are chief gateways for trade.

They need to perform with unprecedented efficiency, because our economic survival in the international market place is at stake.

This critical dependence on ports was recognised in the late 1980s with a national awakening to the need for waterfront reform.

This has led to a number of initiatives which targeted stevedoring, towage, ship safety, port costs, Australian shipping costs and the land-sea interface.



Hon. Bruce Baird

Significant benefits to port users are already flowing from these initiatives, but much remains to be done if we are to be internationally competitive.

Within this environment, the New South Wales Government has introduced a vigorous program of port reform, guided by the six key principles contained in our Marine Administration Act.

These are:

- * Increasing autonomy for the major NSW ports;
- * Encouragement of private sector involvement in building and operating port facilities;
- * Reform of port authority pricing to encourage economic use of the ports;
- * Streamlining of management;
- * Separation of commercial activities from non-commercial and regulatory functions; and
- * Recognition of the need for strategic planning for the future.

In following these principles, the Maritime Services Board has focused on its core functions and shed peripheral activities.

As a consequence, the Maritime Services Board has now completely moved out of cargo-handling activities — which, in the view of our Government, are much better suited to operation by the private sector.

The increasing private sector role in port activities is also reflected in the fact that more than 95 per cent of cargo moved through New South Wales ports is now handled at privately leased or owned berths.

The creation of subsidiary port authorities to manage the main New South Wales ports — Sydney, Newcastle and Port Kembla — has greatly stimulated port managers' motivation to tackle and resolve port-related issues in consultation with their local port communities.

The question of moving to full autonomy for the New South Wales ports is currently being examined by the Government.

One option for the future is the corporatisation of each individual port authority, but any decision by the NSW Government in this regard will only be made after a full evaluation of the benefits for the ports, the related industries, and the community at large.

What is already very clear is that this progressive reform process has delivered and will continue to deliver very real benefits in service and pricing.

For example, as you would all know only too well, the

cost of port services from a customer viewpoint is a paramount consideration.

Aided by the dramatic downsizing of its workforce from more than 3,000 to around 1,000 and other cost savings, the Maritime Services Board has successfully pursued a pricing reform program which began in 1989.

A vital component of this reform process has been real price reductions of some 30 per cent passed on to MSB customers.

I am happy to announce that this trend will continue, with further reductions in prices and MSB revenue requirements to be announced soon, to take effect from July 1993.

These include reductions to container rates which will make NSW ports the most competitive on the East Coast of Australia for export containers.

Now, before I formally declare this Conference open, there is one more matter I should raise.

It is my privilege to serve the Government in two separate ministerial portfolios — Transport and Tourism — and my presence here today is primarily a function of my role as Minister for Transport.

However, I would be remiss if I failed to mention my other responsibilities as Minister responsible for the Sydney 2000 Olympics bid.

We are hopeful that in a few months time the I.O.C. will announce that our bid has been successful, and in welcoming you to this prestigious conference, I hope your stay in Sydney will whet your appetite for a return visit to our city in the year 2000.

Now, with that thought planted firmly in your minds, it gives me much pleasure to formally open the 18th World Ports Conference of the International Association of Ports and Harbors, and to wish you a successful conference and an enjoyable visit to Sydney.

**Address by
Mr. John Mather, CBE
President of IAPH
Chairman & Chief Executive Officer
Clydeport Limited**

Hon. Peter Morris MP; Hon. Bruce Baird MP; Right Hon. Lord May of Sydney Ald. Frank Sartor; Mr. Max Moore-Wilton, Conference Chairman and Director General of the NSW Department of Transport; Mr. Kusaka, Secretary General of IAPH; Distinguished Guests, Fellow Conferees, Ladies and Gentlemen:

I am privileged beyond measure to respond on behalf of all conferees and their companions, to your most warming address of welcome to this impressive city of Sydney, on the occasion of our 18th IAPH World Ports Conference.

Not only that, to do so in your world famous Opera House gives me — and I am quite sure all who are present here — enormous pleasure and satisfaction.

Our Conference Theme: "Ports — The Impact of Global Economic Change" is inspired, I believe, and very topical. My brief remarks will very superficially reflect my views on aspects of the management of that change.

When I take a long, hard look, at the paradoxes and inconsistencies of our global socio-economic and political behaviour patterns, I feel I could be forgiven for betting against our very survival, far less our capacity to continue



Mr. John Mather

to progress. We do, however, survive and, importantly, progress continues to be made in many fields of endeavour.

Why should that be so? I think it can be simply said.

In an ever-changing world we all have a capability to manage change, to whatever degree.

It may well be simply said.

The complexities which become apparent, however, when we unravel the factors of change can, of course, be quite staggering. We must go through that process, however, to allow ourselves to gain the benefit of more reasoned judgement in determining the courses of action which we believe will best suit our circumstances.

Broadly, I think we can say that there is a fundamental interlinkage of social, economic and political development in the world at large. The fact that we ourselves and, significantly, others who have some influence in the shaping of our destinies temporarily misplace or alter a link here or there may well be a cause of present strains in our fragile world.

These meanderings are only useful in so far as they put me in the mood to make sweeping observations on our present condition. An awareness of our circumstances, however, loosely described as far as their impact on world trade is concerned, will the better enable us to plot our future course of action.

In the world of IAPH's three regions then, it is my impression that so far as **Africa/Europe** is concerned the concept of centralism, which has had wide acceptability, is now suspect in both economic and political terms, whether applied nationally or internationally.

The market economy concept or liberal capitalism — call it what you will — is still slowly trying to establish itself. A state of recession has generated massive unemployment which in turn, amongst other things, is creating a demand for job protection. Multi-national organisations seem to me to be more fearful than confident in respect of their future prosperity.

In America, matters are not all that different. Yet more optimism is apparent. We cannot, however, overlook the fact that GATT's Uruguayan Round remains to be completed. World trade is put at risk. Trading blocs are emerging as, for instance, that of the USA, Canada and Mexico which can be seen in some respects as a counter to that of the European Community.

In the Asian Region, prospects appear generally to be distinctly brighter. Modernisation programmes, however defined, are announced almost daily. The concept of gradualism is moving towards market reforms. Some

deep-rooted strains which do exist in parts of the region do not, however, encourage complacency.

More broadly, my perception is one of a world in which the thrust of activity is towards manufacturing for export. Realignment of trading patterns are a distinct possibility. Where they do occur, their impact on the world's ports can be traumatic; managing the ensuing changes successfully is well-nigh an art form.

Certainly, management of the world's ports cannot now be seen, if indeed it ever was, as a hit or miss affair.

I have alluded, in the **wider world scene** to so many happenings, events, projects, disparate and otherwise, which undoubtedly will impact on our ports. The trick of course is to be able to slot them into some order of priority as they might affect our preconceptions and then be able to manage the "fine tuning" process of making the changing circumstances work to our advantage or, at the other extreme, to carry out the radical "surgery" which might appear to be necessary to secure the best interest of our respective ports; and to do this, moreover — and most likely — at a time when port managements generally are expected to generate higher productivity from their ports' resources and tighter cost effectiveness.

It is in this way, and in such a situation, that we are expected to correlate our ports' aspirations, with concepts and developments such as **intermodalism, transshipment, "downstream", manufacturing, infrastructure "plus" single and/or joint arrangements, storage and distribution potentials and quality assurance systems**, to name but a few.

Our port management must also contend with a variety of constraints and other factors which, in their way, inhibit management options. These factors derive from legal enactments, codes, rules and the like which are themselves the product of enlightened opinions and perceptions of a public which has become increasingly aware of a mutual and shared responsibility to secure the **sustained economic development of Planet Earth and the safety of its citizens on land, sea and in the air.**

Let me be quite clear. Our Association, the International Association of Ports and Harbors, and our members are committed to discharging our obligations in these respects, to the full extent to which it is in our power to do so. Impositions, however, are invariably not without costs, which have to be borne at a time when our commercial ethos, if not our instincts, tell us that cost reductions are the name of the game.

In all of these the presentations to be made at the working sessions of this Conference, together with the conclusions reached in generated debates will, I am quite certain, be both relevant and enlightening. My own reading of circulated

papers has already provided me with excellent material on which I, and my colleagues at Clydeport, can hone our management skills the better to deal with our own rapidly changing circumstances.

I, therefore, very much commend them to conference participants for that very essential purpose.

In one respect, ladies and gentlemen, I am quite content to let my management skills lie dormant, even in the face of quite dramatic change. I refer of course to the change from our home background to our presence here in this glorious city of Sydney.

We have every prospect of obtaining maximum benefit and pleasure from a most impressive social programme devised by Max Moore-Wilton and his Conference Organizing Committee, who have had sole responsibility for managing that change on our behalf.

Your team's management of that programme, Max, is already exceeding our expectations. Believe me when I say that we are totally content with its unfolding delights.

Finally, on behalf of my Vice-Presidential colleagues, our Board of Directors and Executive Committee and indeed all who have made the journey to be here in Sydney, please allow me the opportunity to thank again

Hon. Peter Morris MP

Hon. Bruce Baird MP

Right Hon. Lord Mayor of Sydney Ald. Frank Sartor.

The warmth of your welcome and the efforts which you have clearly made to make us at home are very gratifying.

Finally, to all the marvelous performers who have entertained us in this splendid setting, thank you from us all.

It is now my duty to announce the names of the Chairmen and Members of the five Committees for this Conference, who were appointed by the Board of Directors or by the President. The Chairmen and Committees are:

- Nominating Committee with me as Chairman
- Budget/Finance Committee: Mr. Don Welch (Charleston)
- Credentials Committee: Mr. Van den Heuvel (Amsterdam)
- Honorary Membership Committee: Mr. Robert Cooper (Auckland)
- Resolutions and Bills Committee: Mr. Pat Falvey (New York).

In so doing, I would request you to see the full membership list which is posted on the bulletin board in the registration area at the Hilton Hotel.

The Sydney Conference

as seen by Neil Sinclair, LLP Reporter

Very few week-long business conferences succeed in retaining for more than a couple of days the attention of most delegates.

And it is a rare conference indeed that can achieve this distinction in competition with the myriad attractions

of a city renowned for its vitality, hospitality, scenic beauty and distinctive architecture.

The 18th world ports conference in Sydney, however, managed to maintain throughout almost all six working sessions the interest of a sizable majority of the approxi-

mately 500 delegates. Its ability to compete successfully with the lures of a city bathed for the most part in an Indian summer owes much to the relevance of the issues debated and the exemplary efficiency of the conference organisers and hosts, the Maritime Services Board of New South Wales and its port authorities of Sydney, Hunter Ports and Illawarra.

In selecting the impact of global economic change as the event's *leit motiv*, conference chairman Max Moore-Wilton had clearly tapped a collective nerve among members of the International Association of Ports and Harbors. And in focussing the management and financing session so firmly upon port privatisation, the Maritime Services Board had anticipated correctly an acceleration in the trend away from state ownership and central planning towards private capital and corporate governance.

Together with sessions devoted to world trade, the environment and human resources, port privatisation proved a major draw for delegates — many of who were contemplating or already involved in the complex process of ownership change.

Privatisation topics united speakers from as far afield as Malaysia, the United States of America, Scotland and New Zealand. But they also clearly raised an echo among delegates from a large number of ports, including those in China, Australia, Africa and Europe. For the first time, the People's Republic of China sent a delegation to the biennial conference. Headed by Tu Deming, executive director of the China Ports & Harbors Association and director of Shanghai Port Authority, the 26-strong delegation included representatives from the PRC's eight main ports.

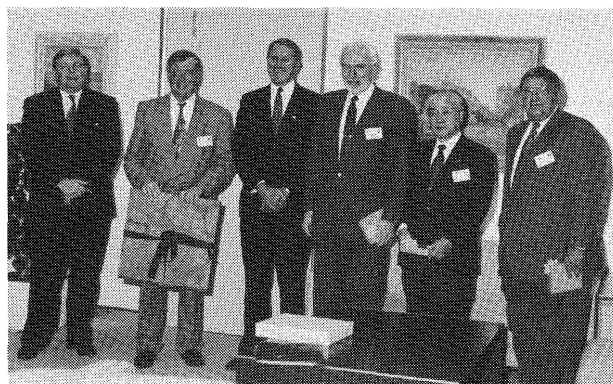
Mr. Tu, who was speaking during a visit to the coal



Mr Tu Deming (center) chats with Mr. Cooper, IAPH First Vice-President from Auckland (right).

terminals at Newcastle, New South Wales, said that membership of IAPH and attendance at the Sydney Conference had been prompted by the opening of PRC ports to competition and the accelerating pace of change in world trade. It was believed to be the first time that senior representatives from both PRC and Taiwanese ports had together attended a major international port conference.

The concept of privatisation as a fundamental part of global economic change was articulated as early as the opening ceremony at Sydney's distinctive Opera House. Bruce Baird, New South Wales Minister for Transport, argued that future economic growth would be determined



Max Moore-Wilton (left) with the IAPH Officers pay a courtesy call on the NSW Minister for Transport Hon. Bruce Baird (3rd from left) prior to the opening of the Sydney Conference.

to a great degree by the cost and efficiency of handling international trade. There would, he added, be a 'critical dependence' upon ports.

As a result of legislative changes designed to help facilitate increased efficiency, the Maritime Services Board of New South Wales had, said Mr. Baird, moved completed out of cargo handling and left it to the private sector.

Mr. Baird added that the state government was now considering the question of 'full autonomy' for New South Wales ports. One option, he said, was corporatisation of all ports.

A key figure in any change will be Mr. Moore-Wilton, who is direction-general of transport for New South Wales. He was able to look back upon one of the most successful biennial conferences ever held by IAPH and reflect not just upon the high standard of formal presentations but also on the stimulating level of communication and discussion they had prompted.

Relaxing after the second and closing plenary session, Mr. Moore-Wilton said that a very significant amount of time and effort had gone into the selection of the conference theme and individual topics.

'It was important that the theme be relevant on the day rather than two years previously when we began to focus on the conference topics,' said Mr. Moore-Wilton.

He paid tribute to his Maritime Services Board colleagues Wayne Gilbert and John Hayes. As chairman and executive secretary respectively of the conference committee, they played a very major part in both planning



Mr. Wayne L. Gilbert, MSB's Chief Executive acts as Chairman of the 18th Conference Organizing Committee.



Mrs. Moore-Wilton (extreme right), wife of Mr. Max Moore-Wilton and Mr. Geoff Smith (2nd from left) from MSB Sydney are pictured with the IAPH Head Office members.

the event and ensuring that it ran extremely efficiently.

Indeed, it is a mark of their success that insufficient sound-proofing of the translators' booths was about the only serious criticism voiced in any numbers by conference delegates.

With its astute choice of topics, first-class facilities, excellent attendance and superb organisation, Sydney will be an exceptionally hard act for any port to follow.

So perhaps it is just as well that two ports and not one will be hosting the 19th biennial conference in 1995. Seattle and Tacoma on America's Pacific north west coast will be jointly responsible for planning, organisation and management.

It is the first time that the biennial conference has been hosted by two ports and the Association's by-laws had to be amended to allow the appointment of more than one conference chairman and conference vice-president.

Mick Dinsmore of Seattle and John Terpstra of Tacoma will be the joint hosts, sharing the cost as well as the administration duties. Mr Dinsmore was unable to be in Sydney but over lunch on the final day of the conference Mr Terpstra outlined some of the plans for 1995.

"It's too early yet for details but we've already sketched out some possible ideas and themes for the conference," he said.

They include the environment and containerisation — two areas in which the Washington state ports are very experienced.

"Seattle/Tacoma is the second largest North American load centre for containers behind Los Angeles/Long Beach," said Mr Terpstra proudly.

With their extensive knowledge and experience of all aspects of unit-load shipping, including intermodalism and double-stack trains, Seattle and Tacoma could be considered ideally situated to formulate and manage a conference programme with containerisation as one of its central themes. Mr Dinsmore, of course, spent many years of his career with a major North American railroad and has spoken eloquently and frequently on intermodal issues at port and transport conferences.

As one of the pioneers in computerised cargo information systems, Seattle/Tacoma might also be expected to flavour the conference with some of the new technology

it is applying to both imports and exports.

In common with most North American harbours, Seattle and Tacoma are only too well aware of the important and growing role that environmental issues play in port policy and operations. Indeed, part of the region's renowned logging industry — a major contributor to Tacoma's exports — is allegedly under threat because environmentalists have succeeded in protecting the habitat of a certain species of owl.

Mr Terpstra played down the impact of the owl on Tacoma's lumber trade but readily acknowledged that the environment in all its manifestations was a crucial topic for all ports.

It is also one in which ports large and small, general and specialised, could benefit from a common approach and co-operation through IAPH.

Seattle and Tacoma's successful joint bid to host the 19th world ports conference is testimony to the way in which ports which occasionally compete for the same cargo can co-operate in many other areas. By jointly hosting the 1995 conference the two ports can also more easily manage the considerable administrative and financial burden such an event invariably involves.

"One of the toughest details is the sheer number of people," said Mr Terpstra.

He expects around 500 delegates plus about 300 partners and others to attend, making some 800 people for the major social events and key opening and closing ceremonies.

"Logistically, it's very demanding," stressed Mr Terpstra.

Although the conference will be based in downtown Seattle and many of the social events will be held in and around the city, a half-day tour of Tacoma is planned, culminating in a "truly memorable" evening event.

After Seattle/Tacoma the IAPH Board has chosen London as the venue for the 20th world ports conference in 1997. It will be the first time that the biennial conference has returned to a host port: The Cafe Royal Hotel in London was the venue in 1965.

The Port of London's selection for 1997 is the successful culmination of at least two years' campaigning by Port of London chief executive David Jeffery. A regular attendee at IAPH conferences and head of the trade facilitation committee, Mr. Jeffery was absolutely delighted at the Association's choice. He and his PLA colleagues now face the awesome task of organising, with the IAPH secretariat's help and guidance, what is unquestionably the port industry's biggest international convention.

In 1999 the biennial conference is scheduled to return to the Far East/South East Asia region, with the Japanese city of Kobe emerging as a strong contender for the role of host port. Kobe mayor Kazutoshi Sasayama claimed that the city had all the necessary facilities for holding large-scale international conferences and meetings.

Kobe's bid to host the 21st world ports conference (and the last one this century) will be formerly considered — along with any other contenders — in Seattle in 1995.

(Mr. Neil Sinclair is Manager, Editorial Services, Lloyd's of London Press Limited, and he acted as an IAPH reporter for the Sydney Conference.)

Keynote Addresses

08:45, Monday 19 April

Report by Dr. Peter Rimmer

Two contrasting, but complementary, keynote addresses were given on the impact of global economic change on seaports. The first address examines key trends in international trade likely to affect port management - increased traffic and different forms of cargo delivery (e.g. containerisation). The second address considers the impact of global economic change from an Australian business perspective.

Ports — The Impact of Global Economic Change

Guy Pfeffermann, World Bank Private Sector Arm

Port managers need to monitor trade prospects. Europe and Japan will experience slow growth and the USA modest growth because of ageing populations and unemployable people compounded by curbs on investment stemming from high 'real' rates of interest (i.e. net of inflation) — a reflection of government deficits and the enormous cost of German unification.

Labour and management shedding by large corporations will increase productivity and job prospects, particularly in the USA. Among developing countries rapid growth is expected in the Asian-Pacific Rim and Latin America with modest growth in Eastern Europe. Trade forecasts will outstrip world production because trade accounts for an increasing share of GDP. New regional arrangements (e.g. EC and NAFTA) are also likely to accelerate output.

A marked increase in seaborne trade will be matched by structural changes in its composition due to: a reduction of long-haul transport of final products stemming from 'outsourcing' intermediate and assembly tasks to developing countries; a decrease in the demand for shipping arising from the growth of petrochemical manufacturing in oil-producing countries; the shift from bulk to general shipping from the decline in raw material requirements (e.g. motor cars); and a reduction in the shipment of raw materials (e.g. oil and coal) prompted by conservation measures and environmental concerns. A new ranking of countries based on their expansion of trade will emerge with Thailand, Hong Kong, Korea, Malaysia, Taiwan, Singapore, China, Indonesia, the USA and Mexico in the 'top ten' and Eastern Europe and the Soviet Union at the bottom of the list. Future growth areas include the Chinese Economic Area, Latin America and India, whereas Africa (apart from Morocco) and Eastern Europe (except for Hungary, Poland and the former Czechoslovakia) will experience little growth. Industrialised countries will continue to dominate world trade but there will be scope for private sector investment in ports within developing countries.

Ports — The Impact of Global Economic Change: An Australian Business Perspective

Campbell Anderson, Managing Director, Renison Goldfields Consolidated Limited

How can Australians react effectively and efficiently to global change and where will this productive response lead them? Australians are coming from a weak position as the country's standard of living has slumped from being the world's tenth in 1970 to eighteenth in 1993. This slide has been triggered by adverse external conditions and counter-productive, slow and short-term responses.

As illustrated by the mining industry, new competitors are emerging which expose the erosion of Australia's competitive advantage stemming from a reduction in permissible search areas. Indeed, mining and agriculture can no longer protect inefficient local industries. Deregulation, removal of tariffs and structural changes are necessary to restore Australia to being among the world's 'top ten' nations in per capita income. If free trade is maintained, these changes should encourage Australians to seek international markets not only for traditional resource commodity exports but for elaborately transformed manufactures.

A reduction of trade barriers and the ensuing boost in world trade in the mining industry, for instance, would increase the demand for unprocessed raw materials (e.g. coal and iron ore with 5-10% tariffs), processed raw materials (tariffs 11-16%) and mining services (limited by international finance). Australia would be adversely affected if the Uruguay Round collapsed. By paying attention to price, quality and sensitivity to the local way of doing business, Australia could boost its trade in the medium to long term with the Asia-Pacific Rim if the Uruguay Round is successful. Australians need to equip themselves with applied business education to negotiate their way through Asian hierarchies and formalities.

Traditional trade arenas in Europe, however, should not be forgotten. Australia is still closer to Europe than Asia in 'economic' distance because communication is enhanced by similar language, culture and laws. Unless structural reform is successful, particularly on the waterfront, Australians will be unable to capitalise on either new or traditional markets.

Dr. Peter Rimmer: Head, Department of Human Geography, Division of Society and Environment, Research School of Pacific Studies, The Australian National University

Summaries of Working Sessions

By Dr. Peter Rimmer

Working Session 1

— Ports & World Trade

Ports and trade are surveyed in all major regions of the world. The Uruguay Round of the General Agreement on Tariffs and Trade (GATT) provides the context. Negotiations were scheduled to conclude in December 1990 but they have been extended. Trade in services, foreign investment and protection of intellectual property are included for the first time in GATT's deliberations. A recurrent theme has been the importance of making regional free trade agreements GATT-consistent. These would match IAPH resolutions favouring free and fair trade and the elimination of trade barriers.

Working Session 2

— Ports in the 90s

Management and Financing

Privatisation of public ports has become a worldwide phenomenon. It is being used to overcome managerial and operational inefficiencies. A recent survey shows that 36 countries are contemplating privatisation. Examples can be drawn from the United Kingdom, the Western Hemisphere, Malaysia and New Zealand. Privatisation involves the sale of public assets to the private sector though it is also used to include arrangements in which ownership remains in the public sector but management is delegated in some fashion to a private sector organisation.

Although attractive to financially strapped government as a means of repaying loans and reducing direct public sector employment, privatisation also promises to stimulate economic growth by increasing the capital market and increasing private sector participation. Besides making dealings transparent privatisation offers flexibility to management and employee sharing in ownership (ESOP) by diffusing the decision-making process closer to the port and away from the political process.

Even if privatisation is recommended the decision can only be made with the full commitment of management and employees. A recurrent theme, however, is that privatisation is not a panacea to all port problems (i.e. an objective in itself) but should be assessed on a case-by-case basis. There is little point in substituting a public monopoly with a private monopoly. Deregulation is necessary to induce greater competition. Detailed evaluation of privatisation is still premature but there are signs that it is leading to a much-needed change of culture on the waterfront.

Working Session 3

Ports & Trade Facilitation

At the junction between inland and sea transport the port has a key role in facilitating cargo movement along the transport chain. Before 1900 the way in which trade was undertaken remained largely unchanged. The total transport

process — sale, delivery to the port, loading and transport in a ship, discharge, distribution to a land destination — had evolved as a series of discrete elements.

Commercial documentation was kept to a minimum and travelled with the goods on board the ship. After 1900 trading patterns changed, consumer demand widened and a linked transport chain emerged covering cargo movement from origin to destination. There was an increase in the number of parties involved and new regulations delayed cargo flows. Information, however, still moved with the cargo between origin and destination. Since the 1950s two chains have been recognised: (i) the transport chain along which goods pass; and (ii) the information chain.

As the transport chain has been streamlined attention has had to be focused on transforming the information chain into a continuous information flow by dispensing with traditional methods and persuading all parties to work together to realise the common goal of paperless trading. Most success in implementing paperless trading has been achieved by Customs' Authorities but their activities are within national boundaries. Further progress must be achieved at the international level.

Working Session 4

— Bulk Loading Ports

Australia's transport task differs from other parts of the Asia-Pacific region because of its emphasis on moving bulk cargoes — coal and iron ore. These cargoes are bonded together in the global steel industry. Ports play a pivotal role as the interface between land-based mega-road trucks, rail trains and conveyor belts, and the bulk cargo ships that ply the world's oceans. Computerisation and programmable logic are used widely to monitor and control flows.

Automation of processes is occurring where possible. These are part of unremitting efforts to boost efficiency in materials handling methods to ensure that productivity per labour unit in Australia is very high compared with overseas competitors. Compared with the People's Republic of China, the USA or the Commonwealth of Independent States, Australia is a small producer of coal. The country, however, supplies about 30% of the world's seaborne coal trade — 53 million tonnes from New South Wales and 70 million tonnes from Queensland. Australia is also the world's largest exporter of metallurgical and steaming coal. In 1991-92 it was valued at \$A6.82 billion — over 12% of Australia's export earnings. Also the Australian iron ore industry mines, treats and ships some 100 million tonnes per year valued at \$A3 billion.

Working Session 5

— Ports and the Environment

Changes in attitudes to the environment were originally sparked by the Club of Rome and the 1972 UN Conference on the Environment in Stockholm. Further momentum was derived from the Brundtland Commission's "Our Common Future" and the World Commission on Environment and Development 1987. The latter led to the Earth

Summit in Rio de Janeiro in June 1992. There were 178 countries participating, of which 114 were represented by their head of state.

The IAPH's Committee of Legal Protection of Port Interests (CLIPPI) monitored the UN Conference and tabled its report to the 18th Biennial Conference in Sydney. Inevitably, the Rio Conference will lead to different economic attitudes and action because there are large parts of the world economy that are unsustainable. International action is likely to protect the world's oceans and, given their location in ecologically vulnerable zones, seaports will undoubtedly be affected. In the short term global and local interests have hindered the development of an effective environmental policy.

Invariably, environmental interests play a subordinate role in decisions about production and consumption. Socio-economic trends, such as the current recession in Western Europe, are inimical to schemes for protecting the environment.

It is unclear what environmental objectives are needed to achieve sustainable development. Furthermore there are problems of translating international standards to regional or local situations. Indeed, an effective environmental policy is only possible where society as a whole, including the polluters, is convinced of the seriousness of the problems. A good environment transcends sectoral biases and is in the interests of everyone. Not only is business the main cause of environmental problems but it must take the lead in resolving them.

These developments have important consequences for port policy and IAPH's role in disseminating information on dredging and legal considerations. Attitudes can be changed quickly as illustrated by the high cost of dredging in the Port of Rotterdam. The Port has taken the lead in organising a workshop on the Environmental Challenges for European Port Authorities (ECEPA). This initiative could be extended to all ports with the IAPH acting as a catalyst in defining standards for international Green Awards for safe and clean ports and ships.

Working Session 6

— Ports and the Human Factor

People count. Yet the human factor in port management has often been neglected. Various attempts are now being made to compensate for this missing ingredient. The training, education and development of port personnel to cope with global change have been featured in the Port of Singapore. More specifically, the Port of Rotterdam has focused attention on the training of port personnel in handling dangerous cargoes. Offsetting the preoccupation with potential megaports, attention is drawn to the problem of how to serve remote and isolated island communities in Japan. Finally, the liability of port directors and officers to claims promoted by shareholders, employees, contracting parties and regulatory matters are considered. Claims against environmental impairment and defamation are also increasing.

First Plenary Session

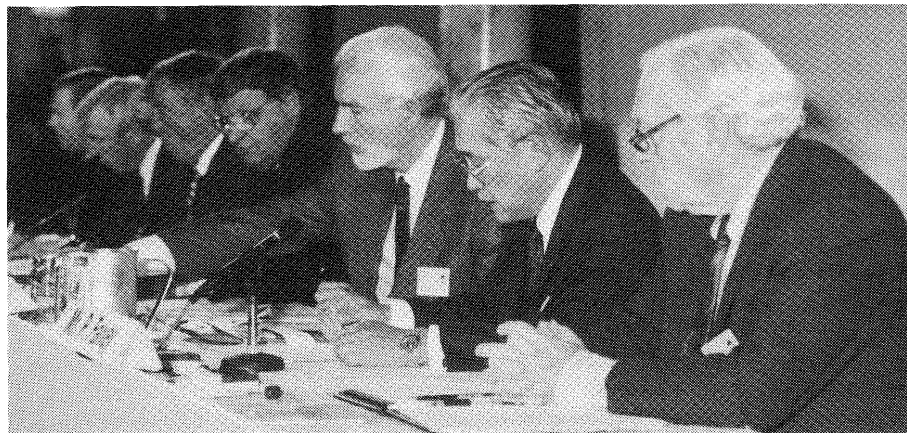
Monday, 19 April

At 10:45, President Mather opened the meeting with his welcoming words to all the delegates and presided over the full session agenda dealing with the Association's affairs. Following the previous issue in which we announced all the major decisions and resolutions resulting from the plenary sessions, in this issue we feature some additional reports on the issues which were presented at the session from the various committees and individuals.

Credentials Committee:

Chairman G. van den Heuvel (Amsterdam)

Mr. Heuvel reported on the status of membership in attendance concerning the Regular and Board members and confirmed that the quorum required in the By-Laws in both categories had been duly met. The numbers reported were: 238 Regular Members, 110 were present at the Conference and 42 represented by proxies; out of 90 Board Members, 31 were present and there were 20 proxies.



IAPH Officers at the First Plenary Session. From left: Max Moore-Wilton, Robert Cooper, John Mather, Carmen Lunetta, Jean Smagghe, Hiroshi Kusaka and Patrick Falvey

Secretary General's Report

By Mr. Hiroshi Kusaka

Mr. President and fellow members of IAPH's global family:

It is a pleasant duty for me to report on the activities of our Association for the past two-year period following the Spanish Conference two years ago.

First I would like to express my deep gratitude and appreciation to our hosts, the Maritime Services Board of New South Wales, and MSB's Ports Authorities at Sydney, Hunter Port and Illawarra Port for hosting this year's Conference of IAPH at this notable port city. In particular, I wish to express my profound respect and thanks to Mr. Max Moore-Wilton, Mr. Wayne L. Gilbert and Mr. John Hayes and the other members of the Organizing Committee for their strenuous efforts and dedicated service in making the arrangements for the Conference, which was officially opened yesterday evening by the Minister for Transport, the Hon. Bruce Baird, at the Sydney Opera House in the impressive manner all of us witnessed.

I am extremely grateful for Mr. O.H. J. Dijxhoorn, Liaison Officer, Maritime Safety Division, International Maritime Organization, for joining us at this Conference.

I would also like to express my deep appreciation to all of you here for taking the time out of your extremely busy schedules as port directors to attend this important gathering of our Association. Of course, I do not overlook the valiant efforts of those members who, although unable to come to Sydney to join us this week, have nonetheless constantly backed the various endeavours of IAPH and paid their membership dues on a timely basis.

Our Association has been extremely active during the past two years. To give you a picture of the wide range of tasks our members and committees have been working on, the major activities in chronological order are listed and included in my written Report submitted to this Conference.

We can look back with pride on the numerous achievements we have been able to report to IAPH's worldwide membership. In so doing, we pay due tribute to the President, Vice-Presidents and Legal Counsellor Chairman for the invaluable advice they have offered us, to the committee chairmen for their sterling leadership and to the committee members for their selfless service.

The fruits of the work carried out by our committees and liaison officers are covered in the reports, in the form of both publications and presentations by the Chairmen and the officials concerned which you will hear at this Conference.

It has been one of our major goals to expand the field of our activities so as to align ourselves more closely with the changes that have taken place in transportation and information systems. As the conference theme "Ports — The Impact of Global Economic Change" indicates, it has been a particular aim of ours to help ports to cope with the impact of changes in the international economy and trade patterns, along with the progress of intermodalism and EDI.

In order to meet these requirements, the Executive Committee, on the basis of the recommendation of the Strategic Planning Committee (chaired by President John Mather), decided at its meeting in Charleston last May to

restructure the Technical Committees in an attempt to strengthen the respective committees and to reorient their work areas. I hope that the recommendations for the reorganization proposed by the Strategic Committee will win the members' support at this Conference so that we can imbue our future activities with yet greater momentum.

Today, our Association has 234 Regular Members and 109 Associate Members from 80 different countries or economies. As we will be hearing in greater detail from the Membership Committee Chairman about the membership situation in this Session, I will not dwell at length on how many members we have gained or lost during the past two-year term. Nonetheless, I am pleased to report here that ports from China, Romania, Vietnam, Cape Verde and — quite recently — Stavanger of Norway, Nakhodka of Russia and Conakry of Guinea have joined IAPH as new members.

It is my conviction that the strength of our Association owes much to the enthusiastic volunteers who have participated in extremely challenging work which have required of them ideas, energy, money and time. These efforts have been continued from the standpoint of IAPH's ideal of contributing towards the overall efficiency of world ports. I am very proud of the ways in which our members have worked together over many years in spite of the barriers of language and distance which separate one from another. I strongly hope that the mutual respect, the friendly working relations and the spirit of mutual assistance which our Association members have succeeded in nurturing among us will continue to be observed by all members, as these qualities must be the most valuable assets of our Association.

In close cooperation to the staff members of the Head Office, I will spare no effort to further the Association's aim of contributing to the members' collective interest, and thus help to bring about even greater success in the future on the basis of the advice and leadership offered by our members. We look forward to your continued support in the challenging time ahead.

Finally, I am convinced that the Conference convening this week in Sydney will be an event of the utmost importance for our Association, as we strive to further enhance our capacity to meet the varied needs of our members and the interests of all ports and port communities throughout the world. Thank you.

Membership Committee Chairman Carmen Lunetta (Miami)

Mr. President and colleagues, ladies and gentlemen:

On behalf the Membership Committee, I would like to express our sincere thanks to the officers, the Board and Executive Committee members, and the Head Office staff for their efforts in helping our Committee in its effort to win new members and more units from the existing members. I particularly wish to thank all the members of our Association for their understanding and support of the burden-sharing principle of our Association and for the regular payment of their annual dues — which are, of course, the basis of the wide-ranging activities carried out by the Association.

President John Mather, who, indeed, was my predecessor on the Membership Committee until 1991, visited Shanghai more than once to meet the key officials of China's

major ports and appreciated their strong desire to become IAPH Regular Members. The eight ports — Dalian, Shanghai, Qinhuangdao, Taianjin, Qindao, Nanjing, Guangzhou and Zhangjian — have all joined IAPH. I am very pleased to see so many delegates representing these ports are now attending this Conference.

Of course, they are not the only newly-joined Regular Members. Since the Spanish Conference, we have added ports from Romania (Constantza), Vietnam (Saigon), the U.K. (Felixtowe) and Norway (Stavanger), National Ports Authority of Cape Verde, while quite recently Nakhodka of Russia, Public Port Corporation IV, Indonesia and Conakry of Guinea have joined IAPH.

At the same time, though, it would not be fair if I failed to mention that some members have left our Association for the various reasons including financial difficulties. I sincerely hope that these ports which used to be active in IAPH will be able to return to the Association in the near future.

As of April 14, 1993 there were 238 Regular Members subscribing 729 units and 111 Associate Members subscribing 113 units, from 84 countries and economies. Although the number of members has seen no major change during the last two years, since almost an equal number of members have withdrawn during the same period, nonetheless, the number of dues units subscribed by Regular Members has increased by 49 units, which I find a source of great satisfaction.

At this Conference, our Committee recommends to the Board of Directors that the Temporary Membership arrangement should continue for a further period. As you may know, this system was adopted by the Association in 1980 for the benefit of those non-member ports who may need a one-year preparation period before becoming Regular Members. According to an analysis conducted by the Secretariat, since the creation of the category some 70 ports have joined as "Temporary Members" in the past 12 years and the majority of these ports have become Regular Members upon expiration of their one-year temporary membership status.

Following this Conference, Mr. Ron Brinson of New Orleans will succeed me as the Chairman of this Committee. I trust that our Committee, under the new chairmanship of Mr. Brinson, will be able to win the continued support of the Association's members in achieving the further enhancement of our membership, upon which our future depends. I know that our Head Office in Tokyo will always be willing to support your endeavours in supplying all the necessary application procedures for each member involved. Thank you!

International Port Development (CIPD)

**Chairman Goon Kok Loon
(Singapore)**

The main activities initiated and undertaken by CIPD during the past two years have been the disbursement of bursaries and organizing the Essay Competition for the Akiyama Prize.

With regards to the bursary scheme, with effect from the 1992 program year, the screening method was changed. Applications were not accepted any more on a case-by-case

basis throughout the year, instead, a deadline was set for the receipt of applications to allow for a collective screening.

The newly revised conditions for entry, together with the deadline of 15 January 1992, were announced in the December 1991 issue of "Ports and Harbors". Until the closing date, a total of 13 applications from six IAPH member ports in six developing countries was received.

Two bursaries were awarded for 1992. The recipients were Mr. Amadou Kane, Dakar, Senegal, and Mr. D. R. Kahindi of the Planning Department of Tanzania Harbours Authority. However, an irregularity in Mr. Kahindi's nomination was subsequently discovered by the Tanzania Harbours Authority and the award was withdrawn.

To further improve the bursary scheme, more publicity should be given to it. This will be done through announcements in the "Ports and Harbors" and advertisements by training institutes who have admitted IAPH Bursary winners into their courses in the past. So, with feedback from the IAPH Secretariat, we have also changed and refined the ground-rules further for the application of the IAPH bursary. The main change is that each application must be submitted by the port on behalf of the employee who is applying for the bursary. The port must provide specific reasons for its nomination of the candidate and detailed information on how the training requested would benefit the candidate as well as the nominating port. For more details please refer to the January-February 1993 issue of "Ports and Harbors", or please write to the IAPH Secretariat in Tokyo.

Now with regard to the Essay Competition, 16 essays on the theme of "How the Quality of Port Services Could be Improved" were submitted by officers from IAPH member ports. These essays were read, evaluated and shortlisted for award by myself, Mr. J.P. Lannou from Le Havre and Mr. Menon from the Singapore Port Institute.

The first prize (the "Akiyama Prize") winner for the Essay Contest is Mr. W.G. Samaratunge, an Administrative Secretary with the Sri Lanka Ports Authority. The second prize went to Mrs. Rita Seno-Ogbinar of the Philippine Ports Authority, while the third prize was won by Mr. B. Brabakaran of the Madras Port Trust of India. Mr. Samaratunge has been invited to attend this Conference. I would now like to invite Mr. Samaratunge to receive his prize, at the same time could I ask President Mather and Mr. Akiyama himself to come on stage to present the award.

(The presentation ceremony took place and Mr. Samaratunge's words of thanks followed.)

Address by Mr. Samaratunge The First Prize Winner in the IAPH Essay Contest 1992

I consider it a privilege to address this distinguished gathering on this memorable occasion. I represent the Sri Lanka Ports Authority, which administers four sea ports out of which the Port of Colombo is the principal one. The Port of Colombo is a multi-purpose port which handles containerized bulk and break-bulk cargoes. We have modernized the Port of Colombo, which is strategically situated on the main sea roads.

Let me be permitted to express a few words about the essay contest and IAPH. I was awarded a bursary by IAPH in 1982 to follow a post-graduate diploma course in port and shipping administration at the UWIST (University of



Wales Institute of Science and Technology). So far as the essay contest organized by IAPH is concerned, I participated in 1990 and was awarded the second prize. When applications were called for in 1992, I thought it would be useful if an acute problem at my port were selected for my paper. Accordingly, I carried out the research on how the limited land area in my port could be utilized optimally to improve the services and contributed to the expansion of trade within the country and the region.

I must thank Mr. Akiyama for being with us to deliver this prize and the Organizing Committee for giving me an opportunity for the officials of the member ports an opportunity to identify their own problems in southern Indian papers. I must also thank Mr. Goon and the members of the panel of judges for their patience in scrutinizing our papers. I must also thank my Chairman who gave his kind permission for me to submit my paper as an entry. He was very keen to attend this Conference but could not do so due to unavoidable circumstances. However, he requested me to convey his regards to all of you and to wish this Conference every success. I would fail in my duties if I did not extend my gratitude to him and the IAPH Secretariat staff for the excellent arrangements they made for me to attend this Conference.

Ladies and gentlemen I consider this as an encouragement for use to undertake further studies to identify problems at our ports and make recommendations for improving the ports' services to the best satisfaction of the port users. Thank you.

Liaison Work with UNCTAD

Mr. Goon Kok Loon
(Singapore)

I would like to continue now with regard to activities of liaison with UNCTAD. I have to report that UNCTAD is organizing a conference in Geneva on 21 October 1993 to discuss the two topics of EDI and port marketing. The Port of Le Havre Authority will be directly involved in the conference.

Also a discussion on the concept of sustainable development took place at the February UNCTAD Conference in Cartagena, Colombia. This concept takes into account the economic and ecological aspects of investment projects, with the aim that the projects do not harm the environment in the long term. Since most ports will be concerned about this new development, it was agreed between Mr. Smagghe, COPSSEC Chairman, and Mr. Cambon of UNCTAD, that IAPH will contribute to the drawing up of a document to

be published by UNCTAD on the concept of sustainable development. This document will include four parts. The first part is an analysis of the port environment to be prepared by UNCTAD and the second part will consist of proposals to tackle the balance between economics and ecology. Again, this will be prepared by UNCTAD. The third part is a presentation of concrete port cases and this is where IAPH members will be required to contribute their input. The fourth part will comprise the conclusions.

Mr. P van der Kluit (Port of Rotterdam — Chairman of the Port Safety and Environment Sub-Committee of COPSSEC) is in charge of looking for the data from ports. I hope that all IAPH members will give him their full support and cooperation.

As part of IAPH/CIPD's contribution to UNCTAD, a monograph on "Computerised Container Terminal Management", prepared by Mr. Eric Lui and Mrs. Poh Hui Ying of the Port of Singapore Authority, was published during the year. So far, a total of ten monographs have been published and distributed to all IAPH members. I would like to encourage all CIPD members to continue contributing monographs and to share their experience or expertise in port operations and management with other ports, especially those of developing countries.

Port & Ship Safety, Environment and Construction (COPSSEC)

Chairman Jean Smagghe
(Le Havre)

First of all, on behalf of all the members of COPSSEC, I would like to present our apologies for the length of our Committee Report, although its weight is not very convenient for intercontinental journeys, it nonetheless reflects the great work of the members of the different Sub-Committees.

Nearly 100 port experts are members of COPSSEC and I suppose that this technical committee is one of the largest and most efficient groups in the world working on port-related technical topics.

During the past biennium, COPSSEC has been enriched with a new Sub-Committee, the Sea-Trade, headed by Lillian Liburdi.

That means that today this committee is focussing its efforts on two main directions: - on the one hand, on safety, development and environment with the Marine Safety Sub-Committee, the Port Planning Sub-Committee, the Port Safety and Environment Sub-Committee, and the Dredging Task Force, on the other hand, on economic topics with the ships Sub-Committee and the Sea Trade Sub-Committee.

Before going further, I would like to underline the great efforts and the invaluable work carried out by the different chairmen of the Sub-Committees. Without their strong determination we would not have been able to provide such a comprehensive report.

1. COPSSEC activities since Charleston

Since the Exco meeting in Charleston, the six sub-committees have had several meetings. A full COPSSEC meeting took place in La Havre in November and yesterday in Sydney. The activities of the different Sub-Committees can be summed up as follows:

The Port Safety and Environment Sub-Committee, under

the Chairmanship of Peter van der Kluit, did a tremendous job completing Practical Guidelines on Soil Pollution, which were approved by the Exco and the Board on Sunday, 18 April.

The **Port Planning Sub-Committee**, headed by Peter Fraenkel, has dealt with and completed the up-dating of the guidelines on Port Safety and Environmental Protection. Its work was approved by the Exco and the Board yesterday. Moreover, Peter Fraenkel succeeded in setting up a joint working group IAPH/PIANC to produce practical guidelines for the design of Approach Channels.

The **Dredging Task Force**, chaired by Dwayne Lee, continued to be very active within the London Dumping Convention (LDC) to the greatest benefit of IAPH ports. Today, the LDC is being renamed LC72. The DTF has issued a paper to present the changes in the terms of reference of LC72 and to define possible IAPH positions in terms of dumping of dredged material. Yesterday, the Exco and the Board approved the proposals of the DTF. Moreover, at the request of IMO an updating of the survey on the disposal of dredged materials was completed by DTF and published in September 1992.

The **Marine Safety Sub-Committee**, headed by Captain John Watson, has worked on Vessel Traffic Services, sub-standard ships, electronic charts and availability of qualified marine operations personnel. Its activities have been carried out in close cooperation with different international associations such as IALA, IMPA, EHMA, ICS and of course IMO. A complementary resolution on SBT tankers will be submitted to the 2nd Plenary Session which will take place on Friday, 23 April.

The **Ship Sub-Committee**, chaired by Jean Michel Moulod, has continued its work on trends in ship design, gathering information on new tanker design, container vessels, dry bulk carriers and passenger vessels. The survey presented in the full COPSSEC report also analyses maritime transport and the situation of the world fleet.

The **Sea Trade Sub-Committee**, chaired by Lillian Liburdi, met for the first time in Charleston. The objectives of this sub-committee are:

- 1: the investigation of a possible consistent statistical definition of cargo;
- 2: the exploration of a standardized forecast of world cargo movements; and
- 3: the development of a worldwide database of marine terminal capacity.

With this aim in view, three working groups have been set up, and a first survey to collect information on cargo forecasts has been launched.

2. — Future of COPSSEC:

I would now like to speak about the future of COPSSEC. The changes which will occur with the new organisation of the Technical Committees will not act as a brake on the activities of the different groups working within COPSSEC, but as a boost. Moreover, I will encourage all the members of IAPH to increase their support and bring their own contribution to the surveys carried out by the members of COPSSEC. We mustn't forget that all this work is not completed for the delight of a few experts but for the benefit of all. It would take too long to list the numerous surveys issued by COPSSEC over the years, but the interest of the different UN agencies in our work is in fact our best label of quality.

To conclude, I would like to address my most sincere

thanks to all the COPSSEC activists, making special mention of the tireless Chairmen of the Sub-Committees, and very particular mention of our friends — Peter Fraenkel, who has been very active chairman and who has handed over the chairmanship of Port Planning to Phillip Ng, and to my well known Vice Chairman, Alex Smith, who announced his retirement yesterday. Thank you, Alex and Peter, for the tremendous job you have carried out during all these years for our committee. Thank you for your attention.

Cargo Handling Operations **Chairman Robert Cooper** **(Auckland)**

I have the honour of reporting on the activities of the Cargo Handling Operations Committee.

Since the last biennial Conference, the Committee's work has focused on two areas of interest. The first is an on-going concern over the dimensions and ratings of containers used in seaborne trades. The second is with the provision of container handling gantry cranes appropriate to the developing needs of ports and container shipping.

In regard to container dimensions and ratings, the Committee has conducted surveys of member ports of the Association to establish whether or not ports could cope with handling containers of increased dimensions and ratings and, if so, at what costs.

In brief, the results showed a willingness to provide for customer requirements, but a prudent wariness of signalling acceptance of major investments in changes to port infrastructures and equipment to handle larger dimensioned containers. The problems of funding and providing such changes were exacerbated for ports in developing countries.

Given that some ports were handling, and continue to handle, limited numbers of containers of increased dimensions, mainly in length and height, but in some cases also in width, the Committee undertook a survey of member ports to establish the degree of penetration of these non-ISO standard containers into the international ports system. The results of the survey have been reported to you in detail, but in brief the penetration was modest only.

The Committee is now planning to repeat that survey as the results will be an important monitor of any changes and trends that may be occurring. This survey work will commence after the conclusion of the Sydney Conference.

The Committee was able to contribute to the UN/ECE Seminar held in Geneva in September 1992 on the Impact of Increased Dimensions of Loading Units on Combined Transport. In the context of the Seminar 'Combined Transport' was taken as a synonym for intermodal or multimodal transport.

There was very wide representation at Government, international association and regional association levels of all modes of transport, and the professional input ensured the high quality of debate.

As a result of various viewpoints expressed for ports, the Seminar noted that the problems for ports and inland container terminals in handling larger containers are likely to be those of increased costs and reduced efficiency. A particular problem seemed to be an increase in length and width of containers. The width between the legs of many gantry cranes is not sufficient to allow the longitudinal

passing of 49 feet containers, and evidence was given that adaptation of such cranes did not seem economical.

The Seminar noted that a proliferation of container sizes would considerably complicate storage and stack planning of containers in ports and terminals and would almost certainly require additional storage space or lead to reduced capacity.

The Seminar concluded that, from a strictly commercial viewpoint, port and container terminal operators were not opposed to attracting non-standard container traffic, provided the extra costs were borne by the customer. One leading European port was quoted as estimating the handling time for non-standard containers as three times the normal, but this experience as not debated in detail. It was also felt that the handling requirements of non-standard containers should be compatible with those of ISO series I containers.

Given the considerable costs for ports to adapt to handling over-sized containers, the Seminar recognised the particular difficulties of developing countries which had often just started to reap the benefits of recent, large scale investments into container port facilities dedicated to ISO series I containers.

One of the disappointing aspects of the Seminar was the lack of any comprehensive cost-benefit studies and market research justifying the demand for, and economic viability of the proposed new ISO series 2 standard containers, from the proponents for major change.

Perhaps not surprisingly the Seminar's conclusions were broad rather than specific. Attached to the report of our Committee you will find there are relevant extracts from the findings and I would commend them to you as a very interesting study of bureaucratic decision-making. In summary, I would say that your investment in port infrastructure is quite safe, there is no major change impending, but I think it will be to the Association's benefit that we keep an on-going watch on that situation.

Turning now to container handling gantry cranes, the Committee has embarked on some useful work to establish trends in specifications for and provision of this equipment and the purpose is simply to establish a reservoir of knowledge within the Association from which member ports can draw as they wish with the intention that this will improve the quality of decision-making.

The Committee is developing a survey of Association member ports with a view to establishing the numbers, age-groups, operational life expectancies and broad capabilities of container handling gantry cranes in the port system.

It will also be designed to establish trends in dimensions and specifications, e.g. "beyond Panamax", types of girder booms, self-propelled or rope-operated trolleys, steel structure standards and suchlike. The Committee is also keen to collate and share useful information comparing "refurbishment of retro-fit" versus "new purchase" decisions and maintenance experience.

It is planned for this survey to be conducted following the Sydney Conference and the analysis and promulgation of the information will be done by the Committee in the course of the next few months. In conclusion, I would like to record my appreciation of the co-operation of other technical committee chairmen, the support of my fellow Committee members who are weak in numbers but strong on quality and also an appreciation of the Secretariat in Tokyo, whose tireless efforts have enriched the work of the Committee.

Trade Facilitation

**Chairman David Jeffery
(London)**

To put the work of the Trade Facilitation Committee into context, I quote a poem on the district line of the London Underground —

"Sometimes things don't go after all from bad to worse,
Sometimes, muscadel faces down frost,
Green thrives and the crops don't fail"

Mr. Chairman sometimes when you complain about an issue much neglected the President of IAPH will give you a withering Scottish school-masterly look over the top of his spectacles as he's done today several times and give you the job to do.



The Trade Facilitation Committee has been inactive for quite some time. Consequently, as the new Chairman, it was timely to reflect on its purpose. I couldn't find really the scope and the focus that I expected.

The Trade Facilitation Committee met in January in London and I was grateful for the attendance of representatives from the Far East, from the USA and of course from Europe. I commend to you the written report which gives a brief summary of the meeting and subsequent decisions. New Terms of Reference have been established and a strategy and policy for the work of this committee has been put in place as well as a definition of the context in which this work must be done. I hope the Conference will endorse the Terms of Reference, the policy and strategy would be welcomed as we embark on our work.

Our determination is to look at this topic as a business issue and not a technical issue. Our purpose is to try to deal with the topic in a way that will bring those who are not advanced in information technology into it quite easily. We will do this by looking not only at the methods by which data can be used to improve these information systems but also at the procedures and other activities which will one day come into that process.

We do not yet have a programme of work in place. This will emerge from a meeting which it is hoped will take place reasonably soon after this Conference so that we will be able to report at our next Conference that the Trade Facilitation Committee has made effectively in this very important field of activity.

Public Affairs (PACOM)

**Chairman Dominic Taddeo
(Montreal)**

As you know, Mr. Bob Calis used to be the Chairman of this Committee and, following the Exco meeting held in Charleston, Mr. Calis contacted the Officers concerning his



resignation as the PACOM Chairman due to his retirement from the Fraser River Harbour Commission. I received a letter in early December from Mr. Cooper, Mr. President, asking me on your behalf to assume the chairmanship of this Committee and I am deeply honoured that you asked me to assume it.

I immediately contacted the IAPH Head Office and asked them to forward me documentation that they had from previous years, to try and make sure that the continuity that was there would carry on and, hopefully with the Committee members, to enhance what we've done over the years. Our Committee met on Saturday 17 April in Sydney and our discussion focused on the work to be undertaken by us.

As you saw today at the Opening Ceremony of the Trade Exhibition, there is a display corner of children's paintings from Japan and Australia. The Port of Osaka had a painting contest to make sure that our ports are well known and that the various communities that we deal with are properly spoken to.

Bob in his letter had also told me that we want to broaden the thrust of this Committee so that we encompass the whole, broad range of communication and not just public affairs or advertising. Today, what you saw was an example of how we are trying to reach out, and we are trying to make the next generation more familiar with our ports and harbors.

The Committee discussed the possibility of the establishment of a documentation centre for the exchange of information and preparation of a catalogue which could be distributed to IAPH members in printed form or in a diskette.

Our Committee is also interested in conducting a survey to see how the respective port authorities are reaching their markets and what their media plans are.

Last year the Port of Montreal reviewed its videos and divided them into two sections, commercial and corporate.

The commercial video is being shown to the Port's clients in Europe and the American markets to outline the port's activities. The Corporate video is for the benefit of local citizens and politicians and shows such aspects as the port's economic impact and the roles of people involved.

The Committee discussed the need for a study to find out the programs conducted in the respective ports to protect the environment.

We heard from Mr. Shanley from Dublin that his port has formed school and business partnerships involving teachers and parents, and has a system of education for selected pupils.

The Committee also heard of other activities such as the sponsoring of triathlon events in Tauranga, a children's painting competition in Osaka, a public speaking program in Tacoma, and a painting competition in Dublin with a prize consisting of computer equipment donated to the winner's school.

It is our plan to strengthen our Committee and thus we will welcome any of you to join us in our Committee's efforts.

Legal Protection of Port Interests (CLPPI)

Acting Chairman Patric J. Keenan (Cork)

On behalf of Mr. Paul Valls, who has not yet arrived in Sydney, I take pleasure in reporting briefly on the CLPPI's activities. The Committee has been meeting regularly since the last Conference and met again on the afternoon of Saturday, 19 April here in Sydney. The report of the Committee's activities was submitted to you. Referring specifically to the question of finance, there is an on-going



need for finance for the Committee to function effectively because of the liaison that has to be maintained with the various international organizations. This has been supported in the past and the Committee hopes that it will continue in the future.

Another item which is not in the report but which should be noted is that Pamela Le Garrec, who has been serving on the CLPPI over a number of years, has been appointed as Secretary-General of the European Community Ports Association. This is most welcome news.

IAPH European Rep. Report

By A. J. Smith

In reporting on events and developments which have taken place within the many maritime-oriented U.N. Agencies, inter-governmental organisations and non-governmental international organisations located within the European Area with which IAPH wishes to have close relationships; and which, to whatever extent, impinge on IAPH interests, I fear I may have fallen into the trap of superficiality. My hope is, therefore, that readers of the report with an interest in this or that subject area will see my references as markers to hidden depths which I will be happy to explore with them to the extent which might think appropriate.

What must be said; certainly what must be understood is that the focal position of the world's seaports at the land/sea



interface is now quite firmly in the spotlight of an expanding interest shown by these many organisations which, for whatever reasons, have business which impinges to some degree on the business of the world's ports.

My report provides you, I believe, with evidence of that phenomenon.

It is pertinent to state, however, at this point, that, as they say, "there's no such thing as a free lunch".

As the IAPH profile becomes more prominent there is an increasing expectation of direct IAPH involvement in the activities of these many organisations.

For you, that means, simply, that there must be a draw

on the expertise which truly is only available at your ports. Thus, it is for you to judge and decide on the extent to which you can divert hard-pressed personnel, often for extended periods, in support of the development of policies for eventual dissemination as an IAPH contribution to international debates and, of course, participating in any resulting action.

My report contains recommendations at pages 3 and 4 as respects the work stemming from UNCED; pages 6 and 7, UNCTAD, page 7, ILO, page 11, IHO, pages 16, Lloyds. As respects pages 18 to 30 on IMO, many references are made to recommended action for IAPH Committees. The detail of these can be elaborated as necessary.

Second Plenary (Closing) Session

The Second Plenary (Closing) Session was held from 14:00 on Friday, 23 April to deal with various issues such as the elections of a new President, Vice-Presidents, a new structure of the Technical Committees and the appointment of their chairpersons. It was presided over by Mr. Mather. The agenda included the recommendations of the Resolutions and Bills Committee towards the adoption of the four resolutions - both those which have been traditional with IAPH Conferences such as expressing appreciation to the hosts and condolences concerning deceased colleagues as well as those resulting from Committee initiatives.

Honorary Members Elected

In accordance with the recommendation by the Honorary Membership Committee chaired by Mr. Robert Cooper (Auckland), the Conference elected the four individuals, namely Messrs. **F.L.H. Suykens (Former General Manager, Port of Antwerp, H. Molenaar (Former Chairman of Management Board, Port of Rotterdam), A.J. Smith (IAPH Liaison Officer with IMO and IAPH European Representative) and John Mather (The 19th President of IAPH, from Clydeport Limited)** as Honorary Members of IAPH for their meritorious service to the Association. Elaborate Honorary Membership certificates, which IAPH Head Office had commissioned from a London-based calligrapher, were presented to Mr. Smith and Mr. Mather, while the Head Office arranged for Mr. Molenaar and Mr. Suykens to receive their certificates later because they could not join us at the Sydney Conference.

Address by the outgoing President John Mather

I do not believe it has been two years since I took over the Presidency from Jim McJunkin — they say time flies by when you are busy and I certainly have been during my term of office.

I have developed my friendship with old friends and have made many new friends this week from all over the world as I am sure you all have. Without doubt, this has been a marvellous week both work wise and socially and we have to congratulate Max Moore-Wilton and his Organizing Committee for all their hard work and dedication not only this week but since the MSB's bid was successful way back in 1989 in Miami. It has taken years of planning

to put all the things in place and I am sure you will all agree they got it "right"!

I would like to single out three people personally who have looked after me so well since I arrived and who have managed to get me in the right place at the right time — John Hayes, Bill Pope and John Wallace.

May I move on to the Conference itself.

The Conference's theme — "Ports — The Impact of Global Economic Change" has highlighted the emergence of regional blocs — EEC, NAFTA and APEC. IAPH members should be concerned that these arrangements are GATT-consistent and free trade is maintained.

Matching regional prospects and port developments have produced variable results.

- Europe and Japan will experience slow growth but port investment will be impressive.
- Unlike fast-going Central and South America, North America will have modest growth but mega-port investment will proceed apace.
- Africa and eastern Europe will be off the world growth map but their port prospects are upbeat.
- Rapid growth in the Asia-Pacific region will be matched by the vibrancy and strength of its port developments.
- Increasing attention will be focused on the emerging Chinese economic area and its ports and of major satisfaction to us must be the fact that some 10 Chinese ports were represented at the Conference for the first time.
- Paradoxically the overall growth in world trade will be matched by port over-capacity.

In tracking these regional developments it is important that IAPH plays a pivotal role in increasing our collective knowledge of commodity movements and their impact on ports.

Regional ports are likely to be competitive with each other but this should not preclude them transforming sister port relationships into business partnerships. IAPH offers an ideal framework within which these partnerships can be formed.

These business arrangements are a step towards ports extending their strategic focus beyond the confines of the terminal to encompass the entire logistics chain between origins and destination. Besides personnel exchanges these risk-spreading relationships can be cemented by adopting

paperless trading — a task targeted by IAPH's rejuvenated Trade Facilitation Committee.

Prominence at the Conference has been given to increasing degrees of private sector involvement in port facilities with employee involvement in ownership seen as a key factor in its success. As privatisation is likely to sweep through Central and South America it is important that IAPH members draw on the success stories from ports in industrial and developing countries such as Clydeport, Port Klang and Tauranga featured at this Conference.

Australia is also a likely target for further privatisation but its traffic task differs from other parts of the Asia-Pacific region because of the emphasis on moving bulk cargoes — coal and iron ore — generated by its efficient mining industry. Many IAPH members are conscious of the importance of container movements but Wednesday's successful visit to Newcastle should emphasise the importance of bulk cargo. This port alone generate 12% of the world's coal traffic.

Much emphasis at Newcastle was focused on caring for the environment as mining has been the target of the green lobby. IAPH is also conscious of these concerns as evident in the work of its technical committees and collaboration with other international organisations which enable it to monitor environmental trends and facilitate the exchange of information on these issues between ports.

The growing list of tasks facing port managements underlines the importance of developing their human resources through training and education. This Conference has drawn attention to some of the pioneering and innovative developments in training and education which have the full support of IAPH.

The papers presented at this Conference reflect the broad sweep of IAPH's agenda. They underline the need for IAPH to define and redefine its mission and priorities to meet the challenges presented by rapid global change.

I now need to express my thanks. My special thanks and appreciation for the support and assistance given to me during my term of office go to my immediate IAPH family consisting of my vice presidential colleagues:-

Carmen Lunetta, 1st Vice-President; Robert Cooper, 2nd Vice-President; Jean Smagghe, 3rd Vice-President; Max Moore-Wilton, Conference Vice-President, and Jim McJunkin, Immediate past President.

I also thank Pat Falvey, who as Chairman of Legal Counselors has kept us all in order and has smoothed our entire week's activity and brought it to a most successful conclusion in the form of resolutions which have now been adopted. Thanks are given to Chairmen and members of all IAPH committees for their efforts. Without their commitment the IAPH family would cease to exist — they are the very lifeblood of our organisation.

Secretary General Kusaka, Mr. Kondoh and Kimiko Takeda and all the IAPH staff at the Head Office and at the IAPH Foundation have been very close to me over many years and, more particularly, during my two years as President. They have been the pilot through the sea of papers which I have had to deal with. I cannot thank them enough for their loyal support and encouragement.

My thanks must also go to Sir Robert Easton and the Board of Clydeport Authority, which is shortly to be wound up, and my present directors of Clydeport Limited. They have all supported me over the years in the affairs of IAPH. I thank them all most sincerely and I must not forget Alex

Smith and my own George MacKay, both of whom have been at my side — totally unstinting in their loyalty and support for the last two years.

Before I step down as President I would like to say for those of you who will have had the feeling of strangeness at the start of our week I hope that you will now accept that, in a paraphrase of what Samuel Pepys (a well-known British philosopher) would have said at a gathering such as this-

'There are no strangers in the world ports community of the IAPH membership, only friends we have yet to meet'.

Before I formally announce our new President I thought I would tell you the story of what happened on my arrival at Sydney airport a week ago at 5.00 am after 24 hours of flying. I was met by John Hayes and Geoff Smith.

They explained they were expecting and waiting for me and Carmen Lunetta. It was decided that John Hayes would go ahead with me to the hotel and leave Geoff to wait for Carmen. Geoff asked how he would know Carmen. — "No problem," I replied, "he always travels with a hunting rifle strapped to his back and his wife will be by his side carrying a heavy-duty machine-gun!"

I told Carmen I will be there for him but from now will fade into the background — if that's possible for a man of my size!

I am now particularly honoured to be in a position to address Carmen Lunetta for the first time as President Lunetta — the meeting is now in the good hands of the new President.

Mr. President, thank you and God bless you all!

Address by the new President Carmen Lunetta

I have the pleasure of commencing my term as President with a most pleasant task John, if you will, on behalf of all the members of IAPH, it is my pleasure to present this gold IAPH pin to you as a small token of our appreciation for all your efforts during your Presidency.

Ladies and gentlemen, this has been a splendid Conference. We opened the 18th Conference with high hopes and great expectations. And I hope you agree with me that, thanks to our hosts, the Maritime Services Board of New South Wales, and to all our friends in Sydney, we close this session with our hopes realized and our expectations a reality.

In Florida, we like to say that the warmth of our sunshine is exceeded only by the warmth of our welcome. This is equally true in Sydney!

As I begin my remarks, it is most appropriate that I offer sincere thanks and congratulations to John Mather. His leadership over the past two years has been unparalleled and it has been a pleasure to work with him during his term as President.

Once again, this Conference has underscored the value of participation in IAPH. The people we've gotten to know over the years, people we call upon as we work in our individual ports, these are relationships we value and nurture.

As we look ahead to the next two years I want to take a moment to discuss a modification in our organizational and operating structure, a change designed to make us more effective, while taking advantage of the tremendous talent available within IAPH.

During my term as President, the Vice-Presidents will each be responsible for one of three areas:

- For Ports, 1st Vice President, Bob Cooper
- For Trade, 2nd Vice President, Jean Smaghe
- For Human & External Affairs, 3rd Vice-President, Dominic Taddeo

Each of these three gentlemen will be assigned a group of committees. However, this new organizational change is not intended, nor does it imply, that the chairmen of the Technical Committees' responsibilities or authority will be diluted.

Nonetheless, it will be the responsibility of our Vice-Presidents to become experts in the interests and issues of those committees.

At upcoming meetings, each of the Vice-Presidents is to present a paper articulating issues of concern to their committees or regions, while at the same time each committee chairman should view his respective Vice-President as a "champion" for committee issues. This is a management tool that was put in place when your Board approved the Board resolution No. 2.

This is an effort designed to improve our internal communications and speed up the decision-making process by giving the Vice-Presidents a defined, meaningful role in our operations — one that allows us to take advantage of their significant talents, while at the same time providing needed assistance to our committee chairmen.

I would also like to take this opportunity to tell you that during my term, our immediate past President, John Mather, will have a new job. He will be responsible for international affairs and international organization liaison. This is an important role, and one well-suited to his considerable talents.

These are great people and I am looking forward to working with them and with each of you.

In the last few days, I have been considering what thoughts I would want to share with you today as your new IAPH President.

Everyone in this room is potentially a competitor. And yet, IAPH has managed to succeed by pulling us all together.

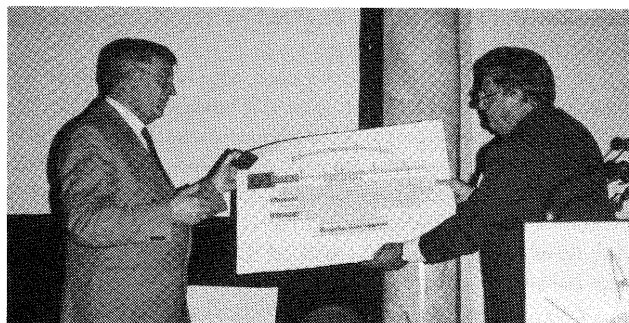
We have increased our membership, strengthened our programs and accomplished good things for all of us. How is this possible? By working together we have much more in common than just competition. We are more alike than we are different, even though each of us is unique.

Sharing our mutual experience is important to all of us. After all, this is what this Conference is all about.

Ports and harbors "control" the global economy, because we control the flow of people and products throughout the world. Governments and nations may dictate economic and trade policies, but until those policies translate into cargo and people moving through our ports, in a very practical sense those economic policies aren't "real". They aren't yet "alive". As ports and harbors, we are the barometers of local, regional and even hemispheric economies.

Given the changing geopolitical landscape, it is imperative that we strengthen our industry so that we can meet whatever changes lie ahead. Let's take just a moment to think back a couple of years to our last conference in Spain. Who among us could have predicted all that has happened since then?

- The collapse of the Soviet Union as we knew it.



Out-going President John Mather (left) receives an IAPH gold pin and his Honorary Membership Certificate from the new President Carmen Lunetta.

- The current Russian crisis and its implications for the future.
- The trade coalitions that have formed and are forming as we speak.
- The conflicts which have erupted, fragmenting countries.

How in the world could we have planned for changes like those? And yet, we have survived and many of our ports are thriving in spite of the political turmoil. However, I believe that as an industry we must do more. We must build on the practical partnerships we have formed with each other. And we must expand on those partnerships to include others — others whose interests converge with our own.

Toward that end, one of the priorities I have established for my term as your President is expanding the membership in IAPH. This will further strengthen our financial stability and it will add to the impact of our voice when we speak for the industry.

Second, perhaps even more important, it will be an extension of the "Practical Partnerships" I mentioned just a moment ago — an extension that will allow us to withstand the shifting political influences at work in the world today, perhaps allowing us to have an even greater influence on directing change as it affects our industry.

There is a connection between freedom, free trade and economic well-being that cannot be denied. We live in a world where barriers are coming down, rather than going up. That is unquestionably good for the world's ports and harbors and for the nations of the world as well. We must be vigilant in supporting and encouraging this trend.

For that reason, I have also established a second priority for the next two years. This is the creation of an "IAPH early warning communications system", a system that will allow us to monitor legislative and government activity that impacts our industry throughout the world, and to keep all of IAPH's members current as to threats that might be on the horizon as well as opportunities allowing us to meet threats to our industry head-on and to capitalize on opportunities as a cohesive entity.

To use an example close to home, and I am sure you will be able to think of your own examples: imagine the impact on a U.S. congressman who introduces a piece of protectionist trade legislation, who would then, within a matter of days, receive resolutions, letters, faxes and phone calls from every port and harbor in the world and from every industry partner. We have a tremendous opportunity to influence the future of our industry and our world.

Another major priority is to listen to our members and develop programs to meet their needs. This will allow us

to create more meaningful written materials and programs to serve our members in meeting their goals.

IAPH has grown because we have understood that there is more that unites us than divides us. Our task is to now serve as educators, to spread the word that competitors can also be partners.

And perhaps as that message is received, we will see further progress in bringing peace and economic prosperity to our too-often troubled world. That is my commitment to you as your new President.

Working together we'll get the job done.

To Mr. Kusaka, and all your colleagues at the Headquarters, our special thanks for your efficiency, in many ways making it work for our members. May I ask all of the IAPH Staff to stand, please. (Applause)

I look forward to working with each of you as we make this exciting and important journey through an ever-changing environment.

Thank you most sincerely for the confidence you have placed in me. It will be my goal to live up to your expectations. Thank you!

Invitation Addresses to the 19th World Ports Conference 1995

**By Gary Grant, President
Port of Seattle Commission**

Let me first congratulate IAPH and our hosts in Sydney for the fine job you've done hosting the Conference this week. The Conference has been interesting and thought-provoking for all of us who have attended. You have made us all feel at home, and we thank you for that. We will be hard pressed to match your grace and hospitality when Seattle and Tacoma have the honor of hosting the Convention in 1995.

For many of you, the 1995 IAPH Conference will be your first trip to Seattle. I think you'll find our community lives up to our theme — "Picture Perfect". We intend to make the trip well worth it for you.

Those of us who have lived in the Puget Sound area area for more years than we might admit appreciate the natural beauty the area offers — the mountains, the water, the clean air and spectacular forests. Frankly, we didn't mind it a bit when Seattle and Tacoma were thought of as something of a backwater in the northwest corner of the United States.

But we have been discovered. The word is now out that our region is one of the premier destinations in the world:

- * Conde Naste rated Seattle as one of the top ten destinations in the world.
- * Rand McNally chose our region as the best place in the U.S. to visit.

And I can assure you that it is not just a great place to visit — it is a wonderful place to live and work in. Despite our interest in keeping our quality of life a secret, we're constantly being recognized as one of the best places in

America to live in. And "Fortune" magazine recently selected the Seattle-Tacoma area as the best place in the nation for global business.

We are proud of the quality of life we enjoy in the northwest. We look forward to serving as your hosts in 1995 — and think you'll agree that the northwest is "picture perfect".

It is now my pleasure to introduce John Terpstra, Executive Director of the Port of Tacoma, our co-host for the 19th IAPH World Ports Conference.

**By John Terpstra, Executive Director
Port of Tacoma**

Thank you, Commissioner Grant. As Gary pointed out, we are very proud of our Pacific Northwest, and really enjoy the Seattle-Tacoma area. As we have been telling you throughout the week, we think our area is truly "Picture Perfect".

And while Gary highlighted some of the great natural attractions and the great city attractions you'll be able to experience during IAPH 1995, I want to mention another important attraction — the tremendous port facilities that we have built.

The Ports of Seattle and Tacoma have invested millions of dollars in the last decade in developing some of the finest port facilities in the world.

We have been pioneers in developing dockside intermodal rail facilities, and we continue to be a leader and innovator in the container intermodal revolution. During IAPH 1995, you will be able to see these fine facilities first-hand.

Our ports are also highly diversified, handling more than just containers. Our mix of cargoes includes grain, autos, lumber, ores, and we continually strive for faster and more efficient ways of handling each.

As we continue to develop new port facilities in the Pacific Northwest, we are also facing more environmental issues than ever before.

While we are still developing our program and speaking topics for IAPH'95, I am sure that environmental issues will be a major part of that program. We plan to share some of our environmental issues and successes with you, to more closely examine how ports can maintain a healthy balance between business and the environment.

We have seen tremendous changes and challenges take place not only at our port, but also at ports throughout the United States and the world. We hope that our 19th IAPH Conference in Seattle-Tacoma in 1995 will provide an excellent forum for exploring how to deal with many of these changes and challenges.

I want to personally invite all of you to come to the IAPH Conference which will be June 10-16, 1995, sponsored by the Ports of Seattle and Tacoma.

I know we have a lot of work to do before you arrive, but we want you to feel assured that your stay in the Seattle-Tacoma area will be "Picture Perfect". So make sure you bring a lot of film for your cameras.

In closing, we want to congratulate all the IAPH and Sydney officials who have put on such a fine Conference this week. We've certainly learned a lot about how a first-rate conference should be run.

And now to give you a flavor of what you'll be able to experience during IAPH'95, I invite you to enjoy the world debut of our "Picture Perfect" video.

Thank you, and we'll see you in 1995.

Ultimate Meeting of the COPSSEC

IAPH – 18th Conference in Sydney

April 18, 1993

The ultimate meeting of the COPSSEC was attended by 35 members in Sydney. No sadness: it was not the end of an adventure but the beginning of the new era. Jean Smagghe, who had the opportunity to present his views during the previous meetings, supported the idea of splitting the COPSSEC and of changing the general organization of the Technical Committees to give more flexibility to the different working groups.

Nevertheless he took the opportunity at this last meeting to express his most sincere thanks to the participants and to all the members of the Committees who have completed a tremendous job during all these years. No doubt the surveys, guidelines and other advice carried out for IAPH by the COPSSEC are of the greatest interest not only to the ports of the world but also to the different NGOs and UN agencies with interest in port and marine safety, port development, dredging and defence of the environment.

The activities of the COPSSEC will not stop and will continue within the framework of the new organization, the different Sub-Committees being upgraded to Committees

to enable their activists to continue their invaluable work in the best conditions.

The different Chairpersons were invited to report on the work completed by their Sub-Committees.

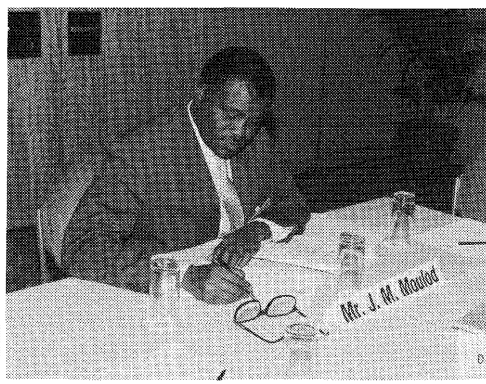
Sea Trade Sub-Committee – Lillian Liburdi

The Sea Trade Committee was formed last May in Charleston and set forth objectives that one felt would be important to all the ports of the world to determine the impact of Maritime Industry trends on our activities. Three tasks were identified to achieve the Sub-Committee objectives:

1. To recommend standard definitions of cargo movement.
2. To define a unified global port forecast that would be able to be achieved and be of use to world ports.
3. To assemble a database of port capacity to understand whether the Port Community has the capability either now or in the long-term future to handle trade as we see it occurring world-wide.

The Sub-Committee met on April 17 and each of the three Working Groups reviewed the work that has been undertaken since last May.

Mr. Fraser McKenzie of the Port of Tauranga, New Zealand is chairing the first Working Group. They have developed definitions that can be consistently applied



COPSSEC Meeting: J.M. Moulod (upper), from left: Lillian Liburdi, Dwayne Lee, Alex Smith, Jean Smagghe, José Perrot, Van der Kluit, John Watson

throughout the world ports. The definitions coincide with cargo categories that could be used in a global forecast process. They are broadly accessible with data that would be readily available.

The definitions were reviewed by the Sub-Committee. It was noted that they may require some minor revision and F. McKenzie will review the areas of potential revision. They are primarily that neither livestock nor passengers were included. It was pointed out that there are cargo-carrying vessels that did carry passengers of a fairly substantial quantity and they need to be included even though they would not be predominant in the cargo category in the information that was being exchanged. F. McKenzie will circulate a paper to his Working Group membership within the next two months. Then, after Sea Trade Committee and Executive Committee approval they can be communicated world-wide to all our port members and subsequently to international organisations for adoption of these cargo categories. It is our intent that these be the foundation category descriptions that will be used for definitions world-wide in the future.

Forecast Working Group

Jean Pierre Hucher of the Port of Le Havre is the Chairperson. They have developed a survey of IAPH member cargo forecasting activities. At the time the initial material was circulated for reply, 67 ports had responded, and another four or five ports have submitted information since the draft report was concluded. The Sub-Committee reviewed the analysis during its meeting (April 17).

The majority of the responding ports indicated that they do prepare forecasts and that they are primarily prepared by their own agencies, although they may in many cases rely on outside specialists to provide them with forecast models or information that they use for forecasting purposes. The primary areas forecasted are cargo movement and vessel calls. The forecast period that is predominant in the preparation of these forecasts is two to five years although forecasts are reviewed annually and updated annually by almost everyone who responded.

The forecasts are done for individual years because it is imperative for ports to understand what their own cargo volume may look like in the forecasted year and the number of vessel calls. They are almost interested in understanding what their own country's cargo prospects are as well as what their competition may be doing so it is most critical that we have some understanding of what other ports are undertaking and are benefiting from in the way of volume. There is a willingness on the part of the majority of the people who responded to participate in a global model and there is a willingness on that of the ports to share their forecasts as long as the information within the forecast would not harm them in a competitive environment. When the draft report of responses is prepared, it will be done in such a way that no individual port will be specifically identified with particular information.

As a result the Working Group is going to make some additional adjustments in the forecast model approach that it has proposed particularly focusing on the importance of forecasting vessel calls and vessel types. They have proposed compiling the analysis by including those additional ports that replied but were not able to be included in the first package. They now propose framing their next step in the process and the intent of the Sub-Committee is that it should describe how it would protect the interests of ports that have

indicated a desire to develop a global model by framing what the global model attributes will be and what the steps in the process in developing such a model will be. The Sub-Committee will recommend to the Sea Trade Committee the next steps in this Working Group's work.

This may require some expenditure. A formal proposal with regard to the development of the model will be made at the next meeting.

Marine Terminal Cargo Capacity

This is a Working Group whose work is more complicated and has the potential to infringe on the work of other IAPH Technical Committees. L. Liburdi is most cautious about the results of this Group's activities and is still a little sceptical about where it will lead us.

Wade Battle of the Port of Miami is chairing this group. They are attempting to develop a database of marine terminal capability and capacities. The first step will be the development by this summer of a matrix which will compare present marine capacity with trade volumes. Their expectation is that they will be able to analyse capacity versus demand and highlight where in various regions of the world additional capacity may be needed or where there is clearly over-capacity. This is a very delicate subject that the people responsible for ports understand, particularly in some of the extremely competitive port ranges.

In the discussion of the Working Group's work it was said that the job was to focus on standard definitions for terminal capacity that would help understanding of how consistently the theoretical and practical capacities of terminals and their equipment may be described.

Then the Working Group agreed to complete its work on the matrix of capacity information it has developed from the various surveys it is performing, to try to develop the standard definitions for terminal capacity, then to make recommendations back to the Sea Trade Sub-Committee at large and then to COPSSEC as to whether it feels that it is practical to continue the work beyond that point or whether it is better to turn that work over to other committees of IAPH who are looking at physical development areas that may be more usefully engaged in this review.

The Sub-Committee does not have any recommendations for EXCO of any financial requirements.

Ship Sub-Committee — Jean Michel Moulod

The Ship Sub-Committee met in November 1992 and yesterday in Sydney.

It was decided to update the previous report presented at the 17th Conference at Barcelona.

Special attention was given to various trends with four types of vessels - tankers, container vessels, dry bulk carriers and passenger vessels. All data and figures are inserted in the COPSSEC Report which has been distributed to all participants.

This year it seemed appropriate to provide IAPH members with trends on ships' statistics and with information about the global economy and an analysis of the maritime trade.

We have decided for the future to continue along the same lines by recording certain information about the economy and the maritime trade. This is of use as the trends in vessels' characteristics are linked with the trends in the economy.

We noted that the volume of maritime exchanges is still

not growing at the same rate as before and the main area of uncertainty in the future will be Eastern Europe and the former USSR.

This is particularly true for the trade in grain. The world fleet is still growing as well as the number and total tonnage of the vessels. The prospects for the shipbuilding industry are not bright as there is an over-capacity of shipyards.

It is expected that the world economy will be based on the specialisation of the large part of industrial production. Very strong economic controls are being now implemented in North and South America, the European Common Market, Japan and South East Asia. This revolution will lead to a continuing change in ships' characteristics.

For the future our proposal for the new terms of reference is:

1. To collect information about the economy of maritime transport and the general policy of ship-owners;
2. To follow the situation of the world fleet;
3. To enquire and comment on trends in characteristics of ships; and
4. To consider the trends in ships' characteristics as concerns the design and equipment for port facilities and to make appropriate recommendations.

Another issue discussed yesterday is a letter from INTERTANKO regarding separate ballast tanks in tankers. The view of the Sub-Committee was to proceed in accordance with the Resolution of the Barcelona Conference.

Marine Safety Sub-Committee — John Watson

Captain Watson indicated that the Sub-Committee had a successful meeting the previous day, which was attended by Otto Dijkhoorn from IMO. The following issues were dealt with:

Segregated Ballast Tanks

Considerable discussion took place on the INTERTANKO submission regarding the reduction of port fees for tankers fitted with segregated ballast tanks.

Pieter Struijs of the Port of Rotterdam outlined an initiative identified as "Green Award". It involves the fulfilment of certain environmental criteria by vessels to provide star ratings which allow reductions in port fees of 4%, 8% and 12%. The system is at the moment available to crude tankers of 50,000dwt and above but will be available to all vessels in future.

The Sub-Committee discussed the issue that arose at Barcelona which queried whether SBT tankers have attributes to allow a port to suggest that their dues should be reduced on environmental grounds and whether all Port Authorities are prepared to accept a reduction in port charges.

The Committee decided to recommend to COPSSSEC that it support the Rotterdam initiative.

Oil Pollution

The Sub-Committee discussed issues concerning oil pollution resulting from marine accidents and agreed that the significant issues to be addressed are sub-standard ships and crews.

It was agreed that the Sub-Committee should focus on port issues.

Port Emergency Plans were discussed and it was considered that the Authorities should be encouraged to review their plans.

Night Signals for Ships

The Sub-Committee discussed the issue of ships underway at night and carrying dangerous goods, displaying an identifying light.

IAPH has issued a questionnaire on this subject and the results will be provided to IMO for consideration in their review of the IMO recommendation.

A significant divergence of views of delegates as to the need to display a signal arose and it was decided to defer consideration of the matter.

Vessel Traffic Systems

The Sub-Committee discussed issues relating to the development of a manual and guidelines on VTS by IALA.

The following definition of VTS was endorsed:-

"The VTS should have the capacity to interact with the traffic and respond to the traffic in the VTS area".

It was also agreed that definitions for "Shore Based Pilotage" and "Shore Based Navigational Assistance" should be included in the manual. The significant difference is that only a licensed Pilot can conduct shore based pilotage but a VTS operator could provide navigational assistance.

IMO Program — Port Interface

Otto Dijkhoorn advised that the Secretary General introduce the concept of a Port Interface for IMO to become associated with port related matters.

The Sub-Committee agreed that it should submit a paper to IMO on issues it considers the IMO Working Group should deal with.

It was noted that the Group will meet in December and papers will need to be submitted 13 weeks prior to the meeting. Following discussion the Chairman undertook to discuss the matter with David Jeffery.

Sub-Standard Vessels

Delegates exchanged information on the examination of ships and identification of sub standard conditions.

It was noted that a database was used in Europe and Australia to record deficiencies and Captain Baird indicated he would enquire regarding the provision of data collected by AMSA to the appropriate European Authority for inclusion on their database.

It was agreed that concerted efforts on ship inspections and, where necessary, the detention of ships, was an effective means of dealing with sub standard ships.

Recreational Craft

Captain Noelke outlined the discussions that had taken place in the European Harbour Masters Association.

The Sub-Committee noted that issues relating to the registration of pleasure craft, the licensing of operators, 3rd party insurance and the use of personal water craft were matters that required continuing attention.

Qualifications of Marine Operations Personnel

The Sub-Committee noted that there was a continuing problem with the training standards of ship personnel from some countries.

Delegates agreed to review a previous Sub-Committee Report on the matter.

Electronic Charts

Delegates noted that the development of electronic charts was still in the formative stages and many problems needed to be overcome before they were used generally.

It was indicated that development was being driven by commercial interests. This may result in the availability of different systems, which is undesirable.

Exchange of Ballast Water

Captain Baird outlined issues that were occurring in Australia in relation to contamination of ballast water by dinoflagellates its discharge into port waters.

The Committee decided to form a small Working Group to review the Resolution on Segregated Ballast Tanks. The proposed resolution was passed at the second plenary session.

Dredging Task Force — Dwayne Lee

IAPH Historic Positions on Current London Convention Issues

There are two major issues that are currently in process as a result of the deliberations of the London Convention.

The first is a collective decision by the diplomats representing their countries at the Convention last November to begin an amendment process to amend the Convention. The Convention was initially established in 1973 and will be celebrating its 20th anniversary this November. Based upon that a number of countries proposed that the 20th anniversary celebration was the appropriate time to amend the Convention to include the changes and resolutions that the Convention had deliberated and discussed and in most cases acted upon in those intervening 20 years. The amendment process to an international treaty is a time consuming process and will take approximately three years to complete. That process was started in November 1992 and thirteen issues were identified as the issues and topics for consideration and for amendment. A number of those issues will have impact and effects on dredging and dredge disposal related to port operations and port activities.

The second major event has to do with the dredge material guidelines. In 1986 the London Convention adopted a Resolution which established the dredge material guidelines and they have formed the international legal basis from which most permit regulatory actions and laws have followed from the member countries for permitting the disposal of dredged material. When the London Convention passed those guidelines they put a five-year review period on them. The intent was in 1991 the Convention was to review the guidelines to ensure that after five years of experience, they were still valid.

That five-year review has been postponed for a variety of reasons. Primarily because of the decision of the Convention for amendment it has been postponed an additional year and will not begin initial 1994.

Based upon that D. Lee put together a paper that went back and reviewed the historic position which IAPH had taken on those issues since it has been a body and that is the paper that has been distributed today.

That paper is to provide IAPH an opportunity to review its historic position on 13 separate issues and if it is so inclined to provide the DTF Chairman as IAPH representative on the Convention different guidance on their position.

The thirteen issues are:

- * Trace contaminants in dredged material

- * Interpretation of the phrase "rapidly rendered harmless"
- * Interpretation of the words "special care"
- * Option of least detriment
- * Agitation and side cast dredging
- * Reverse listing
- * Use of numerical action levels
- * Application of the Waste Assessment Framework to dredged material
- * Establishment of the definition of radioactive wastes
- * Requirement for a scientific and technical basis for amendments to the Annex
- * Proposal for amendments to expand the basis of the scientific and technical to include political, social and economic
- * The inclusion of a precautionary approach to the Convention
- * Definition of "sea"

This paper will be presented to EXCO by J. Smagghe and unless he receives instructions to the contrary D. Lee's intention is to represent this body in future at the London Convention and to continue to represent these positions.

The second item of substance is to do with one of the terms of reference of the Dredging Task Force and that term of reference has to do with considering the feasibility of establishing a management information system which will include all relevant IAPH, PIANC, World Dredging Congress and CEDA documents.

D. Lee passed out a draft Memorandum of Agreement that originated from a meeting that took place in The Hague in February this year involving The Central European Dredging Association, Western European Association, International Association of Dredging Companies, IAPH, PIANC, and IMO. They met to consider the possibility of developing a database for a bibliographic service of scientific and technical literature relating to the environmental aspects of dredging.

The Hague meeting produced the MOA which proposes to hire a contractor to develop the database, while IMO will maintain the database and add literature to it and keep it current. The database will be made available to all members of the partnership in the form of a floppy disc.

The consensus of the Dredging Task Force was that IAPH should support and approve the draft memorandum of agreement.

The estimated cost to do the startup of this project is US\$25,000. It is recommended that the IAPH contribution be approx US\$5,000.

The Dredging Task Force also requested the continuation of the funding that IAPH has provided to the Sub-Committee, which is US\$15,000 on a two-year budget basis. The Task Force incurs expenditure which basically provides the services of lawyers etc. to represent IAPH in the technical and scientific debates and discussions before the London Convention.

COPSSEC agreed to recommend to EXCO that the guidelines and the funds requested be approved.

Port Planning Sub-Committee — Peter Fraenkel

At the last Conference it was agreed that the Sub-Committee should review the guidelines on Port Planning and Design and develop general guidelines on Port Safety and Environmental Protection.

This work has now been completed and has been published in the COPSSEC Report.

It was also agreed that in the future the revised planning and design guidelines be published as a separate document.

The Chairman of the COPSSEC was requested to put to the Executive Committee that the revised document be approved and arrangements be authorised for it to be published as a separate document.

The Sub-Committee was also requested to pursue the question of setting up a Working Group with PIANC to investigate further the design of approach channels. Agreement has been reached with PIANC and work has commenced (Working Group No.30). COPSSEC was requested to recommend to Exco that funds to the extent of \$US2,500 be made available to the Working Group for their future work over the ensuing two years.

Port Safety and Environment Sub-Committee — Peter van der Kluit

Over the past two years the Sub-Committee has dealt with a number of issues:

- * Guidelines on Environmental Problems
- * Activities which are related to IMO and other bodies

One report on Environmental Guidelines is included in the COPSSEC report for approval by Exco and another is still being prepared.

Several members have participated in the process of revision of the IMO recommendations on the transport, handling and storage of dangerous goods in port areas. The IAPH input has been significantly recognised in the drafts currently being considered. P. Van der Kluit stated that his Sub-Committee was pleased with the establishment of a Working Group on Strategy for Port Interface. This is an excellent opportunity to be involved in the decision making process which is important for ports.

Last year the International Chamber of Shipping (ICS) prepared a checklist of dry bulk cargo and dry bulk ships which was discussed by the Sub-Committee during its meeting in Le Havre. This matter is aimed at the safety of dry bulk ships at sea and is a very important issue. ICS asked IAPH for support and the checklist was presented in Ports and Harbors journal (January issue).

The Sub-Committee is also participating with IMO in the drafting of documents to provide guidance on Contingency Planning for Oil Spills in Ports.

At the last meeting of the Sub-Committee a request from INTERTANKO was received to promote among ports the idea that ships should be able to get rid of their waste in ports free of charge. The Sub-Committee does not agree with that approach.

A further approach has been received from INTERTANKO that it would be appropriate to charge vessels for the use of reception facilities based on tonnage and not on the amount of waste they are discharging. That request will be discussed in meetings during the proceedings of the conference.

Another concern was that on earlier occasions INTERTANKO has already promoted the rewarding of ships with segregated ballast tanks through a reduction of port dues. INTERTANKO based this claim on resolutions of IMO and IAPH during the last conference in Barcelona. Except for a disappointing trial in the port of Rotterdam,

these resolutions have not been implemented in any port.

However, the Sub-Committee is of the opinion that it seems fair to reward ships and shipowners which show that they behave in an environmentally friendly way, beyond legal requirements.

In this context, attention was drawn to the fact that the Rotterdam Port Authority is planning to introduce a new system in which a ship will be judged on its total environmental profile, which is a combination of technical and managerial aspects. In this system, a "clean" ship will be rewarded by a reduction in the port dues it has to pay.

In attendance

Mr. J. Smagghe (Chairman)	Port of Le Havre, France
Mr. A.J. Smith (Vice-Chairman)	IAPH European Representative, UK
Mr. J-M Moulod	Port of Abidjan, Cote d'Ivoire
Ms. L. Liburdi	Port of New York & New Jersey, USA
Mr. D. Lee	Port of Los Angeles, USA
Mr. P.C. Van der Kluit	Port of Rotterdam, the Netherlands
Mr. J.J. Watson	Port of Dundee, UK
Mr. P.M. Fraenkel	Peter Fraenkel BMT Ltd., UK
Mr. P. Ng	Port of Singapore Authority, Singapore
Mr. S. Sall	Port of Dakar, Senegal
Mr. N. Diop	Port of Dakar, Senegal
Mr. M. Al Kurtass	Sea Ports Authority, Saudi Arabia
Mr. A. Priso	Cameroon National Ports Authority, Cameroon
Mr. A. Ba	Cameroon National Ports Authority, Cameroon
Mr. T. Iijima	Yokkaichi Port Authority, Japan
Mr. E. Noelke	European Harbor Masters Association (EHMA), Germany
Mr. N. Matthews	Int'l Association of Lighthouse Authorities (IALA), France
Mr. A. Hope	Nortrans Consultants, Australia
Mr. O. Dijkhoorn	Int'l Maritime Organization (IMO), UK
Mr. F.R. Kalff	Haskoning/Royal Dutch Consulting Engineers, the Netherlands
Mr. K. Jurriens	Port of Rotterdam, the Netherlands
Mr. P. Struijs	Port of Rotterdam, the Netherlands
Mr. F.A. Chaudhry	Karachi Port Trust, Pakistan
Mr. M. Ohno	Japan Port Consultants Ltd, Japan
Mr. R. Buchanan	Dept. of Marine & Harbours, South Australia
Mr. P. Keenan	Port of Cork, Ireland
Mr. I. Baird	Port Hedland Port Authority, Australia
Mr. M. Pouliot	International Maritime Pilots Association (IMPA), Canada
Mr. N. Sinclair	Lloyd's of London Press, UK
Mr. Y.F. Guessenn	Port of Abidjan, Cote d'Ivoire
Mr. B. Coloby	Port of Le Havre, France
Mr. A.J. Tait	INTERTANKO, Norway
Capt. G. Asubonteng	Ghana Ports & Harbors Authority, Ghana
Mr. J. Perrot	Port of Le Havre, France

IAPH ANNOUNCEMENTS AND NEWS

The IPD Fund: Contribution Report

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

Contributors Paid:	Amount (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
Clydeport Ltd., U.K.	1,000
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 Academic Society for Port Affairs, the, Japan	267
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
Nagoya Port Authority, Japan	3,564
New York & New Jersey, Port Authority of, U.S.A.	1,000

Niigata, Port of, (Niigata Prefecture), Japan	860
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
Qubéc, 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\$28,903

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

Membership Notes:

New Members

Regular Members

Public Port Corporation IV [Regular] (Indonesia)

Address: Jl. Sukarno No.1 Ujung Pandang
Mailing Addressee: Ir. Sumardi
Managing Director
Fax: (0411) 319044

Sea-Communication [Regular] (Indonesia)

Address: Jl. Medan Merdeka Timur No. 5
Jakarta
Mailing Addressee: Mr. Soentoro
Director General
Fax: (021) 3844492

Associate Members

Dr. Tae Woo Lee [Class D] (Korea)

Address: 1 Dongsam-dong, Yeondo-ku
Pusan, 606-791
Mailing Addressee: Head, Dep. of Shipping Management
Korea Maritime University
Tel: 82-51-410-4384
Fax: 82-51-414-4995/2475

(Continued on Page 34)

International Maritime Information

WORLD PORT NEWS

Environment Code for Shipping Launched

The Chairman of the International Chamber of Shipping, Mr. Juan Kelly, said on 28 April that shipping is overwhelmingly a safe and environmentally benign form of transport, very economical in its use of energy and critical to world trade.

"Yet there is a shadow of adverse public and political opinion on the industry which masks its notable and improving environmental performance over many years. The shipping trade is not helped by the lack of objectivity in the often emotional reaction to maritime accidents involving oil spills."

Mr. Kelly was speaking in London at the launch of the ICS Code of Practice

Shipping and the Environment.

The ICS Environment Code is intended to serve the dual purpose of providing a framework for the continuing development of environmental standards in the shipping industry while highlighting the positive environmental performance which already exists.

Mr. Kelly emphasised some of the industry's strengths:

- 80% of the world's international trade moves by sea;
- over 1,600 million tons of oil are moved by sea annually, more than 99.9% of it without mishap;
- the past decade witnessed a marked decline in the number of major oil spills;
- the volume of oil reaching the sea from shipping operations fell by 60%

over the same period;

- shipping is the most energy-efficient form of transport, some four times more fuel friendly than road and twice that of rail.

Mr. Kelly said:

"This has not come about fortuitously. It is the result of the constant development of improved company practices, coupled with tighter regulatory measures adopted by IMO, in conjunction with the shipping industry. But whatever improvements there have been, the protection of the marine environment from all forms of pollution must continue to be a central objective of the industry. Happily the responsible majority of ship owners recognise that this is as much in their own long term

Membership Notes—

(Continued from Page 33)

Trexlex Morse [Class A-2-2] (U.S.A.)

Address: 3588 Main Street, Keokuk
Iowa 52632

Mailing Addressee: Mr. Robert J. Ridge
Vice President and General Manager
A Division of Svedala

Tel: 319-524-8430

Fax: 319-524-7290

Changes

Puertos del Estado, Ministerio de Obras Publicas y Urbanismo [Regular] (Spain)

(Formerly Direccion General de Puertos y Costas, Ministerio de Obras Publicas y Urbanismo)

Mailing Addressee: Mr. Fernando Palao
Presidente

Fax: 5532974



a number of the Sydney Conference participants. The four-hour meeting was designed to enable those attending to hear reports from those who participated in the Sydney Conference from the Ministry of Transport and the Ports of Kobe, Nagoya, Osaka, Tokyo and Yokohama and a report from the Secretary General focussing on the Working Sessions.

The gathering was followed by a reception where the participants enjoyed viewing a video shot by one of the Japanese participants.

IAPH Japanese Members Meet in Tokyo

On the afternoon of June 8, 1993, a meeting of Japanese IAPH members was held in the Kasumigaseki Building in Tokyo on the initiative of the IAPH Head Office and sponsored by the IAPH Foundation. The meeting was aimed at the promotion of IAPH activities among IAPH members and those in the maritime and transport businesses in Japan and was attended by some 100 people, among whom were

Visitors to Head Office

On May 19, a three-man delegation from the **Port of Sacramento** visited the Head Office where its members were welcomed by Secretary General and his staff. The visitors were Messrs. **Michael Vernon**, Port Director, **George Samuel Oki** and Commissioner, **Willie A. Bell**, Commissioner Vice Chairman, accompanied by **Mr. Akira Kitagawa**, Acting Director for Asia, **California Office of Trade and Investment** in Tokyo.

interests as that of others.

"That said, few shipowners and operators can claim that their environmental standards are beyond improvement in all respects. Moreover, society's increasing demand for improved performance means that the goal posts are constantly being moved. What is considered acceptable today is not necessarily so tomorrow. The Environment Code is intended to complement existing industry measures and to keep greater environmental awareness and protection on the move".

An important aspect of the Code is its ten principles of environmental management which shipping companies are urged to adopt. These principles set a demanding standard to be integrated into the corporate culture and management procedures of shipping companies.

The Code also contains information on the environmental concerns associated with the prime sources of pollution generated by the industry. It lists recommended management standards to help in addressing such problems.

Mr. Kelly said that ICS through its member associations, urged all shipping companies to:

- commit themselves to the principles and standards in the Code;
- develop procedures to monitor their environmental performance; and
- join in persuading governments to provide the shore-based facilities necessary for the avoidance of pollution.

City and Port: Partners For the Environment

IAPH members are invited to participate in the Fourth International Conference of Cities and Ports to be held in Montreal, Quebec, Canada, next October 10 to 13. This important event is jointly organized by the International Association of Cities and Ports (IACP — Le Havre, France) and the St. Lawrence Development Secretariat (Government of Quebec, Canada).

Urban waterfront sites are subject to increasingly strong competition among their port, residential, recreational and industrial functions. The port/city interface is the meeting place for the urban economic and environmental concerns of ports and cities

alike. This Fourth Conference of the International Association of Cities and Ports (IACP), the first ever to be held outside Europe, presents an excellent opportunity to compare experiences and develop a network of international expertise.

Main Topics: "Port Policies and the Environment", "Port Economics and the Environment", "The Port City and its Environment".

To obtain the program, please contact:

Mr. Olivier Lemaire, Director General
International Association of Cities and Ports (IACP)
45 Lord Kithener Street, 76600
Le Havre, France
Tel: 33-35-42-7884
Fax: 33-35-42-2194

Mr. Leonce Naud, Senior Advisor
St. Lawrence Development Secretariat
Societe Iuqebecoise des Transports
Government of Quebec
385 Grande-Allee East, Quebec
City, Quebec, Canada G1R 2H8
Tel: 1-418-643-7788
Fax: 1-418-646-9959

New Publications

Pacific Rim Trade and Shipping: the Powerhouse of World Shipping in the 21st Century

The Asian Pacific Rim has become the driving force of world shipping. Through the 1980s the prosperity and wellbeing of the shipping market has become steadily more dependent on the seaborne trade generated by the region. It is expected to become even more so through the 1990s and into the 21st century.

In addition to this, shipowners based in the Pacific Rim control 40% of the world bulk and containership fleets. Moreover, the region is also the centre of world shipbuilding, the pacesetter for the world shiprepair industry, it plays a vital part in the S&P market and is also in the process of resuming its former crucial role in ship demolition.

During the 1980s there was a re-

markable expansion in the seaborne trade generated by the countries of the Asian Pacific Rim. Despite Japan's continuing domination of regional trade, a substantial share of this extraordinary growth must be attributed to the newly industrialised "tiger" economies — South Korea, Taiwan, Hong Kong, Singapore.

The Pacific Rim accounted for almost 33% of world bulk import tonnages in 1991, compared with 18% in 1981. The region's trade in the major bulk commodities is expected to grow in volume by 25% during the 1990s, although developments elsewhere imply that this will represent only a marginal increase in its share of world trade by 2000.

The region's share of world bulk exports is significantly less than imports. In volume terms it represents only around 16%, although in value terms it is almost 25%. This disparity between imports and exports is partly because the region is heavily dependent on imported energy and partly because during the past decade many of the developing economies on the Pacific Rim have been replacing their imports of processed or manufactured goods with raw material imports for their new domestic industries. Exports of higher value manufactures have risen sharply.

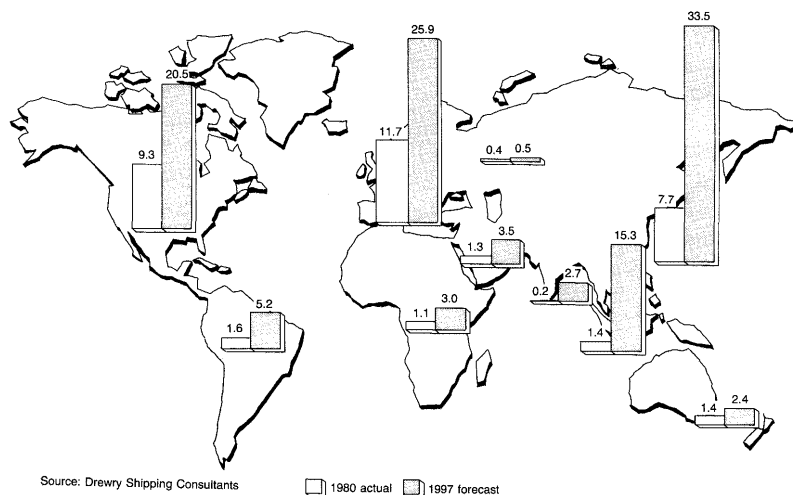
It is for this reason that the Pacific Rim's share of container throughput at world ports rose from less than 30% to 40% between 1981 and 1991. What is more, the region will continue to generate a substantially greater volume of containerised trade than the world average during the 1990s, so that it will have increased its share of world container movement to 47% by 2000.

At the centre of this dynamic growth in trade generated by the Pacific Rim has been a huge expansion in trade within the region. More than 60% of the region's major dry bulk imports are sourced from within the region. Many of its manufactured and semi-processed goods are also exported to regional markets. Little short of 10% (almost 3 million teu) of all container movements at Pacific Rim ports is created by intra-regional trade.

In terms of value the figures are much higher. Intra-regional trade is estimated to have risen from 30% of the Pacific Rim's total trade in 1986 to 40% by 1991. Trade between the newly industrialising economies of South Korea, Taiwan and Hong Kong has leapt 40%

Regional Growth of Container Traffic, 1980-97

Million ten handled



since 1987, and between those countries and China by 30% during the same period.

In addition to the influence which the Pacific Rim exerts on the world shipping market through the huge volume of trade which it generates, the region also enjoys a very large share of the economic benefit derived from carrying this seaborne trade.

Over the past 20 years shipowners based in the region have been extending their control over world shipping capacity. The combined fleet of ships registered under Pacific Rim flags forms the largest regional sector of the world merchant fleet. The only other sector which comes close to this is the West European fleet but whereas the latter has been shrinking fast for many years, the former has been expanding rapidly.

However, this does not take account of the very large volume of shipping capacity controlled within the region but flagged out under open registers, especially flags of convenience. For instance, 60% of Japanese controlled tonnage is flagged out. 88% of tonnage under the control of Hong Kong-based interests is not registered under the Hong Kong flag.

40% of capacity in the major fleet sectors of the world merchant fleet (tankers, bulk carriers and container-ships) is controlled by Pacific Rim interests. In recent years attention has focused on the growth of container carrying capacity, especially by the wave of carriers from the newly industrialising countries of the Pacific

Rim. Regionally based lines controlled 20% of world container fleet capacity in 1972. Almost entirely within the past decade they have built their share up to 44%.

Throughout this period, moreover, there has also been a substantial growth in the volume of other vessel types coming under the control of regional interests. Although Pacific Rim shipowners removed a large volume of tanker tonnage from their portfolios during the 1980s, they continued to build up their fleets of dry bulk carriers so that they now control around 50% of world total capacity in this sector.

A major factor encouraging this penetration of Pacific Rim fleets into the world scene has been cost advantage, not least the large differentials in operating, especially manning, costs which have enabled most regional operators to undercut competition, even in depressed freight markets, without sacrificing profits.

Pacific Rim Trade and Shipping: The Powerhouse of World Shipping in the 21st Century, 130pp, is published by Drewry Shipping Consultants. Individual copies of the Report are priced at £375 post paid.

For further information regarding *Pacific Rim Trade and Shipping*, or any enquiries regarding the Report, please contact either Dennis Stonebridge, or David Price, at:

Drewry Shipping Consultants

11 Heron Quay
London E14 4JF.

Tel: 071-538-0191
Tlx: 22167 (HPDLDN G)
Fax: 071-987-9396

International Perspectives on Coastal Ocean Space Utilization

By: Phyllis Mr. Grifman and James A. Fawcett, editors

This volume contains the edited essays presented at the Second International Symposium on Coastal Ocean Space Utilization (COSU II), held April 2-4, 1991, in Long Beach, California. The COSU conferences emphasize the development of techniques for the wise use of coastal resources, including discussions of policy, technology and development of those resources. In three days of discussion, over 50 papers were presented by academicians, government officials, industrialists, technical experts and other practitioners from 14 countries on methods by which their organizations utilized or protected the coastline in new and novel ways. Because of the broad geographic representation at the conference, discussions covered a wide range of topics, from land reclamation activities along the coast of Bangladesh to the marine policy issues raised by multiple uses of marine and coastal resources around the world's oceans.

Papers are divided into thematic sections, including summaries of national efforts to protect and utilize the coasts, developments in the uses of coastal space, including the creation of "sea cities" by means of reclamation and developing artificial islands, especially in Japan. Other sections discuss means to wisely manage the extraction of minerals in the seabed, increase fisheries resources, and utilize the vast energy potential of ocean waves, thermal gradients and winds. The development of ports and harbors, and issues concerned with the safety of shipping are covered, along with means for improving decision making about competing uses, environmental values and priorities for future use and protection of the world's coastal margins.

The volume is divided into seven sections, as follows:

- I. National Reports: Status of the Coastal Zone
- II. Developments in Coastal Ocean Space
- III. Trends in Resource Development
- IV. Coastal Zone Technologies and Energy
- V. Port Development and Marine Transportation
- VI. Institutional and Management Issues
- VII. Technical Papers on Waves and the Design of Coastal Structures

Publication Number: USCSG-TR-01-93; Price: \$50.00; Pages: 800.

For further information, please contact:

USC Sea Grant Publications, University of Southern California, University Park, Los Angeles, CA 90089-1231, U.S.A.

The Americas

Ports Canada: Improved Results for 1992

Jean Michel Tessier, President and Chief Executive Officer of the Canada Ports Corporation announced the 1992 financial results for the Canada Ports Corporation and the consolidated figures for the total Ports Canada system.

The Canada Ports Corporation is comprised of seven divisional ports (located in Belledune, NB, Churchill, MB, Port Colborne and Prescott, ON, Port Saguenay, Sept-Iles and Trois-Rivieres, PQ) and Ridley Terminals Inc. (RTI) located in Prince Rupert, BC. RTI became a wholly-owned subsidiary of the Corporation on July 30, 1991. The financial overview includes the financial results for RTI for the full year in 1992 compared to five months in the previous year.

The Canada Ports Corporation reported operating revenues for the year of \$52.8 million, up from \$26.7 million in 1991. This major increase was primarily due to the inclusion of financial results for RTI for the full twelve months. However, when excluding these numbers, the Corporation still had a significant improvement of \$5.0

million over 1991. Operating expenses increased in 1992 by \$4.9 million to \$26.1 million, while the Corporation posted a net income of \$11.8 million for the year.

In 1992, the divisional ports handled a total of 26 million tonnes of cargo, a ten percent decrease from the 29 million tonnes in 1991.

In making the announcement, Mr. Tessier said: "A number of our ports had positive results in 1992 with the Port of Prescott leading the way with an increase of 32 percent over 1991 to 624,000 tonnes of cargo. Port Colborne handled twice the volumes reported in 1991 while results at the Port of Churchill showed a jump of five percent in 1992 to 279,000 tonnes."

Despite a work stoppage earlier in the year, the Port of Trois-Rivieres rebounded to record 1.4 million tonnes of cargo, a slight increase over the previous year. The Port of Sept-Iles experienced its lowest tonnage in a decade with slightly over 19 million tonnes of cargo handled while traffic volumes were also reduced at Port Saguenay by 37 percent to 320,000 tonnes. A total of 6.2 million tonnes moved through the facility at Ridley Terminals Inc. in 1992, a decrease from 6.4 million tonnes in the previous year.

Mr. Tessier went on to state that construction was now completed on a second berth at the Port of Belledune to handle coal required by the thermal power plant presently being built by the New Brunswick Power Corporation. This is expected to generate an additional 1.2 million tonnes of bulk tonnage by 1994. As well, the construction work required to fulfill the commitments to the Alouette aluminum plant at the Port of Sept-Iles is almost complete.

The total Ports Canada system, including the Canada Ports Corporation and the seven local port corporations (Halifax, Montreal, Prince Rupert, Quebec, Saint John, St. John's and Vancouver) reported operating revenues of \$218 million in 1992, a record level for the system. Operating expenses totalled \$171 million, up slightly from the previous year, while Ports Canada's net income was \$41 million.

During the year, Ports Canada invested \$62 million in capital investments. Further expansion and upgrading of port facilities at Sept-Iles, Vancouver, Montreal, Belledune and

Quebec comprised the major capital projects in 1992.

Ports Canada handled a total of 167 million tonnes of cargo during 1992, down eight percent from the volume reported a year earlier. Coal was mainly responsible for the downturn in overall port activity with a decrease of over seven million tonnes. Other resource industry products such as iron ore, grain, sulphur and potash also faced reduced volumes while container traffic reported a moderate decline.

Canada Ports Corporation chairman Arnold E. Masters announced in the fall of 1992, the formation of a new transportation partnership between Ports Canada and Canada's two national railways, CN North America and CP Rail System. Mr. Masters described the goal of the new alliance, known as Advantage Canada: "The new partnership was created to promote the greater use of Canadian gateways and transportation routings by providing a coordinated and seamless system of cargo transportation in Canada, for shippers and shipping lines."

"Advantage Canada," the CPC chairman went on to say, "will be establishing standards of quality for the provision of transportation services for all commodities and is quickly developing into a strong partnership, representing not just ports and rail, but most stakeholders in the Canadian cargo transportation industry."

The annual reports for the Canada Ports Corporation and the seven local port corporations (Halifax, Montreal, Prince Rupert, Quebec, Saint John, St. John's and Vancouver) were tabled in the House of Commons on May 25, 1993, by the Honourable Jean Corbeil, Minister of Transport.

National Association of Stevedores Reorganized

The National Association of Stevedores (NAS), announced that, at its annual meeting, the membership voted to change the name of the association and amend its By-Laws to more accurately reflect the activities and purpose of the association.

At the NAS Annual Meeting held at Amelia Island, Florida, April 21-23, 1993, the name of the association was changed to the NATIONAL ASSOCIATION OF WATERFRONT EM-

PLOYERS (NAWE). The association intends to make its services available to a more diversified membership encompassing a wide range of companies engaged in waterfront activities that, in large measure, are subject to the same or similar government regulations and operational problems. Thus, the revised purpose of the NATIONAL ASSOCIATION OF WATERFRONT EMPLOYERS is to "promote, further and support the privately owned stevedoring, marine terminal and related industries of the United States and its territories and possessions."

Gov. Signs Budget for Savannah Enhancements

Governor Zell Miller has signed into law a \$7 billion state budget that includes \$38 million for expansion projects in the Port of Savannah.

Specifically, the bill includes general obligation bonding authority in the amounts of \$16 million for the purchase of two new container cranes, \$8.66 million for work to begin on a new container berth, and \$13 million to help pay for the harbor deepening project

which began earlier this month.

Under terms of the bonding agreement, GPA will pay back the bonds, with interest, over the next 20 years.

"This financing is essential for Georgia's ports if we are to continue to attract a share of the booming international trade market," says Georgia Ports Authority (GPA) Executive Director George Nichols. "Current projections indicate world trade will double between now and the year 2005."

"We must have in place the facilities, the equipment and the people to remain competitive in the marketplace. International shippers and the shipping lines which move their cargo through Georgia are encouraged by Georgia's actions in moving our port enhancement program forward," said Mr. Nichols.

The expansion projects outlined in the Governor's budget represent the third installment of GPA's long-term vision as set forth in its FOCUS 2000 program. FOCUS 2000 not only defines the specifics of facilities and infrastructure required, but establishes a funding plan to accommodate the expected tonnage growth through the remainder of the decade.

"It will allow us to accommodate the new larger generation of container ships now plying the world's major trade lanes," said Mr. Nichols. "It gives us the ability to enhance our service by handling more cargo safely, efficiently and expeditiously."

"The fact that we are positioning ourselves to take advantage of new world markets directly benefits the 63,000 Georgians that earn their living in export and import activities," he added. "But more importantly, all of us benefit through a wider variety of products available at a lower cost and in a more timely fashion than ever before."

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.

Long Beach Port Size To Increase by 35%

Port of Long Beach officials announced that they have reached an agreement on a "milestone" 725-acre land purchase in the North Harbor area which will increase the Port's size by 35 percent and allow it to significantly expand cargo operations in Southern California.

The agreement was expected to be approved on May 17 at the regular meeting of the Long Beach Board of Harbor Commissioners, and the sale will be effective on June 30.

Under the terms of the agreement, the land will be purchased for \$405 million from the Union Pacific Resources Company, Union Pacific Railroad Company and Union Pacific Land Resources Corporation, collectively referred to as "Union Pacific." The land is currently used for oil production.

Among the assets covered in the agreement are 289 acres north of Cerritos Channel, 354 acres south of Cerritos Channel and 82 acres within the Channel.

"Undoubtedly, this purchase is a great milestone for the Port of Long Beach," said Harbor Commission President David L. Hauser. "It will increase our land holdings by more than



Yorktown Clipper's First Visit to Fraser Port

The 138-passenger cruise ship Yorktown Clipper recently made its first call at Westminster Quay in Fraser Port. In honour of the occasion, Rick Pearce, Port Manager and CEO of the Fraser River Harbour Commission, presented a plaque to the ship's master, Captain D. Feil. Shown here on the top deck of the ship with Westminster Quay in the background are, left to right, Graeme R. Murray, Mariner Shipping Agencies Ltd., the ship's agent, Ed Kargl, Fraser Port's Director of Corporate Development, Leyda Molnar, General Manager of Westminster Quay and Market, Captain Feil and Rick Pearce.

The three-year old Yorktown Clipper, which cruises from Seattle visiting spots of beauty and historical interest on the coasts of Washington and British Columbia, will return to Fraser Port several times this summer.

one-third, and for the first time in our Port's history, give us the ready development potential required in this market.

"Also, with the promise of greatly improved rail access through the development of the Alameda Corridor, our Port will truly be in its strongest and more competitive position ever."

Port Executive Director S. R. Dillenbeck said the purchase will allow the port to develop terminals for new customers who have expressed interest in moving to Long Beach, and for existing Port tenants who need larger facilities.

"This is the largest and most significant single land purchase we have made in the 82-year history of the Port," he said. "With cargo movements through Southern California expected to double within the next 30 years, we now will be able to meet our customer's needs well into the next century."

Mr. Dillenbeck said the acreage, which will be used for a combination of container and breakbulk facilities, will generate approximately 1,000 direct jobs within the harbor and 196,000 trade-related indirect jobs.

In addition, the firms who will lease the land from the Port for terminal operations are expected to pay \$5 million in possessory interest tax to Los Angeles County, of which the City of Long Beach is expected to receive \$1.4 million.

"This is a win-win situation for all concerned," Mr. Dillenbeck said. "The Port will be able to better serve its customers, and the City and County will receive added tax revenues and jobs. In addition, businesses throughout the Los Angeles region will benefit from the increased trade."

Mr. Dillenbeck said the land purchase was critical to the Port's future development because expansion through construction of new landfill is becoming difficult.

"For years, the Port has relied on landfill for its expansion needs," he said. "However, under state law, landfill construction must be accompanied by environmental mitigation projects to compensate for the loss of marine habitat within the harbor."

"Mitigation projects are restricted to the enhancement of coastal wetlands, which are in scarce supply. Without wetlands to enhance, we can't landfill. Therefore, our expansion efforts are

now focusing on purchase and redevelopment of existing acreage, as we are doing through this action."

Under the agreement, the Port also will acquire all oil fields and equipment located on the acreage. Mr. Dillenbeck said the Port will contract with the Tidelands Oil Production Co., TOPCO, to operate the wells during the development of the property, but oil production is expected to be reduced after the land is developed as cargo terminals.

"Our primary interest in the land is for terminal development," Mr. Dillenbeck said. The cargo handling needs of current and potential customers will be our highest priority."

The purchase agreement also transfers to the Port Union Pacific's 70 percent interest in a Harbor Cogeneration Plant. That plant, located north of Cerritos Channel, produces steam from natural gas to support oil production and generates electricity for Southern California. The plant will remain in operation, following the Port's purchase, with the remaining 30 percent interest owned by Mission Energy, a subsidiary of Southern California Edison.

The Port will pay for the land from current reserves and future annual revenues, Mr. Dillenbeck said. An initial payment of \$155 million is due on June 30th. Subsequent payments of \$75 million plus interest will be due on July 15, 1994, 1995 and 1996, and a final payment of \$25 million plus interest will be due on July 15, 1997.

As part of the agreement, Union Pacific will pay up to \$87 million of the costs associated with clean up of a portion of the property which has historically been used for oil and gas production.

Oakland Removed from S&P's 'Credit Watch'

The Port of Oakland has been taken off Standard and Poor's "credit watch," it was announced by James B. Lockhart, president of the Oakland Port Commission.

All California ports were placed on "credit watch" on September 3, 1992, following enactment of Senate Bill 844, which permitted chartered cities where the ports are located to receive a transfer of "discretionary reserves" (equal to

25 percent of working capital) from the ports. The act theoretically would have enabled the city of Oakland to take up to \$8 million from the port.

Oakland is the only port removed from the listing to date.

The S&P decision means the rating agency once again affirms its double-A-minus rating for Oakland's senior lien bonds.

Removal of the Port of Oakland from the "credit watch" comes as the port is preparing to refinance about \$76 million in revenue bonds to take advantage of lower interest rates available in the current bond market and to restructure the Port's debt by eliminating all senior lien bonds and associated restrictive covenants. According to Mr. Sonali Bose, Oakland's chief financial officer, the move would enable the port to save about \$400,000 annually in interest payments.

S&P said part of the reason Oakland was taken off the watch is because the port had a coverage ratio greater than 5.0 on its senior lien revenue bonds. In addition, the city of Oakland did not request payment from the port by the March 1, deadline, as required by Senate Bill 844.

The ports of Long Beach, Los Angeles and San Francisco remain on "credit watch" status.

Port Canaveral: Highest ROI of Any Major Port

The American Association of Port Authorities (AAPA) recently released its fiscal year '91 Finance Survey. Based on survey data, Port Canaveral achieved the highest return on investment of any major port in the United States in fiscal year 1991.

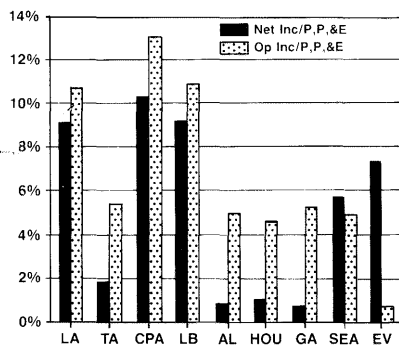
Return on investment, or ROI, is a useful means of comparing business entities, such as ports, in terms of efficiency of management and viability of services.

A total of 66 U.S. ports reported survey data to the AAPA. This included nearly all ports of Canaveral's size and larger, plus some smaller ports.

Two ratios were compiled measuring return on investment. One was the ratio of operating income to value of plant, property and equipment. Port Canaveral achieved a ratio of 10.4% on this measurement, the highest of all ports.

Port Canaveral, which is self-sup-

RETURN ON INVESTMENT-FY91 U.S. Ports with Net Income Over \$3 Million*



Legend:
U.S. PORTS LA: Los Angeles/TA: Tacoma/CPA: Canaveral/
LB: Long Beach/AL: Alabama/HOU: Houston/GA: Georgia/
SEA: Seattle/EV: Everett
*Net income excludes any tax revenues
†Operating income excludes any depreciation and amortization expense
Source: AAPA 1991 Finance Survey and Financial Reports where available information for FY92 was not available

porting and levies no public taxes, also leads all ports in ratio of net income to value of plant, property and equipment (13.2%), when collected taxes were factored out. Even when taxes are included in net income figures, which gives tax-supported ports the advantage, Canaveral surpassed all but one tax-supported port.

(Port Canaveral Journal)

U.S. Ports Support More Than 1.5 Million Jobs

The nation's port industry supports more than 1.5 million jobs, according to studies by the U.S. Maritime Administration (MARAD).

MARAD's analysis of the port industry includes any economic activity directly needed for the movement of waterborne cargo. The main categories are ship services, trade services, cargo handling and storage, and inland transportation and handling.

The analysis, based upon the nation's 1991 handling of domestic and international waterborne cargo, showed that port industry operations were responsible, directly or indirectly, for 1,517,643 jobs, MARAD stated.

Port jobs also were responsible for \$51.8 billion in total personal income, according to the report, as well as for \$22.4 billion in business income; \$130 billion in business sales revenues; \$70 billion in total contribution to the gross domestic product (GDP); \$14 billion in federal taxes and \$5.3 billion in state and local taxes.

MARAD emphasized that the port

industry of the U.S. both assures the nation's cargo flows and generates a chain of economic activity. Other findings of the 1991 port study disclosed that (1) the movement of 865 million metric tons of foreign cargo contributed \$35 billion to the GDP, (2) the movement of every 1,150 metric tons in waterborne foreign trade creates one job in the national economy, and (3) the handling of the nation's waterborne exports and imports was directly or indirectly responsible for port revenues of \$65.4 billion, meaning that the movement of every metric ton accounted for \$75 in port industry revenues.

In South Carolina, the state's seaport system has a profound impact in generating exports and revenues. South Carolina's ports also attract new industry to the state. And, as at the national level, ports directly and indirectly create jobs.

International trade through the state's ports generated 66,305 jobs

A 1990 Economic Impact Study, based upon the MARAD-created computer model Port Economic Impact Kit, was conducted for the South Carolina State Ports Authority. Based upon that data, international trade through the state's ports generated 66,305 jobs, \$6.2 billion in sales, \$1.5 billion in personal income, and \$240 million in tax revenues.

The role of South Carolina's seaports as one of the state's most important economic assets, continues. In 1992, more than 7.5 million metric tons of containerized, break-bulk and bulk cargo moved through the ports of Charleston, Georgetown and Port Royal, S.C. Of that total, exports accounted for 4.7 million metric tons, or approximately 63 percent of total cargo throughput.

The South Carolina State Ports Authority currently is expanding its Wando Terminal to provide new equipment and service capability to meet its cargo handling requirements through the end of the decade; and, simultaneously, is moving ahead of with plans for its fifth seaport terminal in Charleston. The best economic impact on South Carolina is yet to come.

(Port News: Port Charleston)

Africa/Europe

Greater Productivity, Diversification: Rouen

Under the aegis of its 1993-1997 development plan, the Port of Rouen targets greater productivity, accompanied by expansion and diversification. It intends to attain these objectives by investing FF150 million each year over this five-year period whilst protecting and enhancing the environment.

By 1997, the volume of traffic should hit the 27-million-tonne mark. Break-bulk cargo, where the Port's collection-storage-distribution role is an undeniable asset, is a top priority and this category is due to increase at the sharpest rate.

Improved nautical access will stimulate the number of calls of ships carrying bigger loads. Fully loaded 50- to 60,000-tonnes and partially loaded over- 60,000-tonne Panamax will have access to the Port. Moreover, by 1997, all cargo will be handled at dedicated terminals, with major investments in terminals for forest products, sugar (bags) and solid bulks.

Logistical services at Grand-Couronne will be extended. The Port is also investing in powerful, state-of-the-art equipment to efficiently serve the new dedicated terminal.

All of these investments will reap the benefit of the reform of the dock labour system at the Port, with nearly all of the stevedores employed on a salaried rather than a casual basis.

The reform should provoke a 35% rise in productivity. The number of dockers at the Port is down to 242, 220 of whom are salaried employees of stevedoring companies.

"Rouen is an outpost of the newly reformed French port network," said Mr. Jacques Mouchard.

There will be a temporary contribution to the social cost of this agreement with the stevedores included in the Port's tariffs, but it will be offset by lower handling costs.

The stevedoring companies are committed to the latter.

The decreases will gradually attain 10% for grain, other solid bulks and forest products; 20% for containers and bags and 22.5% for other general

cargo. Contracts stipulating lower tariffs are already being negotiated.

(Rouen Port)

Bremen Set to Handle More Coffee Imports

The port operating company BLG - Bremer Lagerhaus-Gesellschaft is undertaking new investments to handle increasing coffee imports through the Ports of Bremen. Special facilities for handling, storing and transporting green coffee are being built in Bremen.

Demand for high-quality coffee is one of the upswing throughout Europe. Per capita consumption is increasing in Germany as well as in the neighbouring countries. This is particularly noticeable in Bremen, since over half the coffee bought by German consumers is imported through the Ports of Bremen.

Coffee experts in Bremen expect European coffee imports to increase almost 20 percent by the year 2000. Bremen is already going with the trend. In 1992, around 540,000 metric tons of green coffee passed through the Ports

of Bremen, compared to somewhat over 470,000 tons the year before. As a city with a long tradition in the coffee trade, Bremen is not only important as a port of entry for the German market, but also as an exporter of coffee products to all parts of the world.

Last year, Columbia, Brazil, El Salvador, Indonesia, Guatemala, and Honduras were once again the main suppliers of Bremen's coffee imports. Bremen has traditionally been one of the major coffee ports in the world and is recognized by the London Commodity Exchange as a "tender port".

Coffee has been one of the classic import goods in the ports of Bremen for centuries. Bremen is especially well known in the major coffee producing countries for its high standards of quality. The phrase "suitable for Bremen" was coined over 150 years ago and has become a byword for a level of quality that only the best coffee beans attain.

Coffee used to be shipped in sacks as a typical conventional cargo. Nowadays the greater part of it is being transported in containers. In 1992, for instance, 70 percent of the coffee im-

ported and exported via Bremen was handled in containers. There is a clear trend toward the use of containers for bulk transport of green coffee. Bremen's new coffee facility is designed to handle both bulk loads and sacks. Automatic conveyor systems transfer coffee beans to a silo and on to a combined storage and transport module. Coffee is stored there in standardised metal containers that are sent directly by train to the coffee companies. Rail transport guarantees planned, on-time delivery. The combined facility in Bremen will begin operation this summer. It is the only one of its kind in Europe.

Without doubt, coffee merchants and coffee roasting companies in Bremen are responsible for the city's international reputation as a coffee centre. Of course, these companies rely on Bremen's logistics businesses and the storage, handling, and transport services they offer. These firms keep up with the newest developments in logistics and technology. As a high-quality natural product, coffee places high demands on transport, handling, and storage. Precise logistics



Symbiosis:ism

Symbiosis is one of the natural world's truly beautiful systems. In reality, this principle of dynamic natural relationships exists not only among plants and animals; it also applies to animals and humans, humans and humans, companies and companies, companies and the environment, humans and the earth. It is this very relationship, expressed by the term "Symbiosis:ism", that is our goal for bringing about better business global partnerships. Through both free competition and harmony, based on a spirit of mutual benefit and trust, Nippon Steel will continue to make these interactions more productive and fruitful for our lives.



NIPPON STEEL

and on-time delivery to the roasters and to the shop shelves are indispensable. The seaport plays an important role as a handling, storage, and service centre.

Bremen is not only a centre for coffee trade and coffee roasting in Europe, but is also well known for coffee research and the development of the new roasting processes. All the modern roasting and decaffeination processes now in general use were developed in Bremen. That is one more reason why Bremen has such an excellent reputation in the world's coffee marketplaces.

Hamburg: Gateway For Suction Cargoes

Hamburg, Germany's largest universal port, goes for diversity. Crates, boxes and container as well as all kinds of bulk cargoes are unloaded in the port on the Elbe. When it comes to grain, oilseed and fodder, Hamburg provides its customers with cargo-handling and storage capacities as well as an intensive cargo-care service of top international quality. Modern terminal facilities at numerous land-based operations and a fleet of floating equipment can unload up to 10,000 t of heavy grain and 8,000 t of fodder a day. The same quantities can be loaded into other ships, rail cars or lorries—with or without interim storage in silos.

With silos, warehouses and other storage facilities for around a million tonnes of grain, oilseed and fodder, the

Port of Hamburg has the largest capacity for short-term interim and long-term quality-maintained storage anywhere in Europe. The silo operators can provide modern drying, aspiration and cleaning facilities, and even have their own laboratories. In the smaller silo and storage firms the services offered include bagging and even filling the goods into retail-sized packs ready for loading onto sales-promoting display pallets.

Several deep-water basins offer berths and handling facilities for bulk carriers of up to 70,000 TDW and 13 metres draught.

Hamburg has acquired a reputation as Europe's most reliable port for suction cargoes. The high speed at which work is carried out and the prompt, trouble-free way goods are dealt with have turned Hamburg into one of Europe's two most important handling and transit ports for grain oilseed and fodder (besides Rotterdam). In 1992 some 5.4 m t of suction cargoes were handled (up from 5.288 m t in 1991). Imports accounted for 3.1 m t (315,000 t of grain, 1,413,000 t of oilseed and 1,317,000 of fodder), 2.3 m t by exports (1,363,000 t of grain and 952,000 of fodder).

As far back as the Middle Ages Hamburg was an important trading centre for grain. Around 1880 there was dramatic upswing in grain traffic. The amount of grain imported by sea rose from 200,000 t to over 2 m t. The first silo was brought into operation at Kuhwarder Hafen in 1905. In subsequent years, Hamburg soon devel-

oped from being a port supplying nothing but its own limited hinterland to one of Europe's leading grain-handling centres.

But suction cargoes have never been a steady source of employment all the year round. Now the peak period is between November and April when the countries of Eastern Europe buy grain on the world market to meet domestic demand once their own harvest is over.

Excellent links to all of Europe's markets — by rail, road and inland waterway — make speedy transshipment possible and also mean nicely-priced freight rates for suction-cargo imports and exports. Hamburg's terminals also have the facilities to handle entire grain trains.

The River Elbe and Elbe Lateral Canal give Hamburg a favourably priced, environmentally friendly means of transporting bulk suction cargoes to hinterland destinations. Motor coasters of up to 3,000 t can be loaded at Hamburg's inland port facilities.

As to the future, Hamburg's growth prospects are good thanks to its favourable location at the cross-roads of East-West routes. As the Baltic's most westerly port, Hamburg is also a key handling centre for grain bound for Russia, the Czech Republic and Slovakia. What's more, regular feeder services guarantee rapid transport to Scandinavia.

Goods Transshipment Rises in Rotterdam

In the first three months of 1993, goods transshipment in the Port of Rotterdam totalled 69.2 million tons. This is 5.2% less than in the first quarter of 1992. In spite of this, container transshipment rose by 3.4% and agri-bulk (grain, animal feed, oilseeds) also showed a considerable improvement with a 19.6% increase in cargo. The mediocre result was largely caused by low imports of bulk cargo such as ore and coal, and to a lesser extent oil, oil products and other liquid bulk.

In view of the economic recession which made itself felt during the third quarter of last year, this fall was not unexpected. Goods transshipment in Rotterdam in fact compares favourably with the results of most other ports in North-West Europe. The majority of the ports in the Hamburg-Le Havre



range showed a decline of 10-20% during the first two months of this year.

Record Transshipments In Port of Amsterdam

A new record was set in 1992 for the volume of goods handled in the port of Amsterdam. The annual figures of Amsterdam Port Management show that, despite the economic recession, over 33.1 million tons of goods were transhipped last year. This represents a rise of 2.1% over 1991.

The transshipment of so-called dry bulk goods (grains, cattle feed, oil seeds, sand, gravel and minerals) increased significantly in 1992 by 15.4%, and totalled almost 19.6 million tons.

Arrival and departure of containers rose by 10.5% to 900,000 tons.

The volume of liquid bulk goods handled (such as oil and oil products) fell by 13.3%, but with a total transshipment of over 10.7 million tons it remains an important goods category at Amsterdam.

The so-called roll-on/roll-off traffic (e.g. cars and trailers), the transport of unit loads (large units) and the transshipment of the conventional general cargoes (sacks, bales) decreased in 1992. The roll-on/roll-off traffic came to a total 891,000 tons (-9.9%), unit loads to 352,000 tons (-37.3%) and general cargo to 664,000 tons (-7.4%).

Last year 4,884 sea-going vessels with a total deadweight of 51.9 million tons sailed into Amsterdam. This was 277 fewer than in 1991, but total deadweight grew. The Port of Amsterdam is receiving an increasing number of large vessels transporting bulk goods.

Another favourable result is the growth in the number of businesses in the Amsterdam port area of Westpoort. In 1992 there were 20 hectares of new sites issued.

In the coming year, despite economic headwinds, executive-director of Port Management, drs. Godfried van den Heuvel, expects transshipments of goods to stabilise. "In view of developments in the economy Amsterdam has done very well. We expect to perform about as well this year. With regard to the issue of business sites I anticipate a reasonable growth seeing the ongoing negotiations we have", says

van de Heuvel. The project Amsterdam Westpoint has an especially important role to play. This year the first phase

will begin in the creation of this international transport centre for combined transport.



New Fruit Terminal In Port of Lisbon

Aware of the need to provide modern port installations for unloading, handling and storing fruit received by sea in cold storage chambers, the Port of Lisbon converted an area of some 15,000 sq meters into a fruit terminal which operates as a free warehouse.

Located at the Alcantara Dock, TERLIS, the new fruit terminal completely computerized, is the most modern one in Europe and one of the four of its kind in the whole Continent. In the domestic framework, TERLIS grants Portugal one of the major port works carried out in the past few years, as it is prepared to load/unload vegetable and fruit products of any kind, despite the type of packaging used.

TERLIS' warehouses and buildings cover an area of 5,000 sq meters while the remaining 10,000 sq meters are reserved for land storage. The terminal is equipped with 3 cold chambers for a total capacity of 1.5 tons and grants temperatures ranging between 0 and 15 degrees in centigrade.

The fruit terminal has an annual capacity of 250,000 tons (70,000 boxes/day) and is served by a 272 meter-long quay, allowing simultaneous

berthing, a railway and 11 quays for truck expedition.

TERLIS renders a high tech integrated service linking load/unload, storage and expedition what proves to be fundamental for the optimization of both efficiency and low-costs, enabling thus to place Portugal side-by-side with her European competitors. It also provides an important gateway for fruit destined to the EC.

ABP, Geest Announce School Painting Winners

Associated British Ports' (ABP) port of Southampton and banana importers Geest PLC have announced the winner of the Schools' Painting Competition organised in the run-up to the official opening of the Windward Terminal.

John Argles, aged 13 years old, a pupil at Bellemoor School, was presented with £220 by the Mayor of Southampton, Councillor Mrs Norah Goss, at a reception held at the Mayor's Parlour.

John was one of 350 local school children from primary, junior and secondary schools in Southampton to submit an entry on the theme of "A

Caribbean Landscape"

Five runners-up prizes were also awarded. Jonathan Adey, aged 13, Bellemoor School; Amy Bowers, aged 6, Newlands County First School; Hazim Hamid, aged 13, Bellemoor School; Sewa Taak, aged 15, Cantell School and Lyndsey Taylor, aged 10, Forest Edge School each received a £25 book token. An additional £500 was presented to Bellemoor School for the highest standard of entries from one school.

The judging panel consisted of Andrew Kent, Port Manager, ABP — Southampton; Don Gosden, Vice President, Geest International Shipping; Mayor of Southampton, Councillor Mrs Norah Goss; Pat Fleming, Editor, Southampton Echo and local artist Barry Hobbs.

After the presentation, the children viewed the banana-handling facilities at the new terminal which were officially opened by the Rt Hon John MacGregor, OBE, MP, Secretary of State for Transport, on Monday 29 March.

Andrew Kent, Port Manager, ABP-Southampton, commented:

"The judges were most impressed. The children obviously enjoyed participating as the overall standard of entries was exceptionally high."

Asia/Oceania

Yokohama Strengthens Ties with Europe

Polarization of Japan's economy around Tokyo, a by-product of Japan's wartime controls and post-war Allied occupation, had long stifled Yokohama's recovery. Now, however, Yokohama is taking over many of the functions in the Capital Sphere: administrative, commercial, service and international exchange. Congestion and the rising price of land, accentuated by the high yen, are speeding up this trend, and many companies are moving into adjacent Yokohama, which offers land and office facilities at attractive prices, is a key transportation hub, and has a hinterland that in many ways is more attractive than Tokyo.

The groundwork for this growth was laid by the Port of Yokohama's

far-ranging redevelopment program which attracted a busy influx of ships from the Far East and European services. In the month of October 1992 alone, 16 shipping companies sent vessels from their European services into Yokohama.

To meet this demand, Yokohama has built business/industrial zones for high-tech companies. Among these, the Hakusan High Tech Park has already attracted many German firms concentrated around the German Industry Center. Yokohama's is attracting 30 tenants from Germany.

As of 1992, 95 companies from 13 countries were located in Yokohama. The United States led with 40%, but Europeans accounted for 51% of the total, with Germany (30%) and Switzerland (7%) leading the way. More than half of these foreign companies moved into Yokohama during the 1980s, especially after 1985. Encouraged by these developments, Yokohama has been actively wooing European companies. Two key steps in this direction are the establishment of sister port ties with Hamburg last year, and the planned opening of a representative office in London this year.

(Yokohama Port News)

S'pore, Japan Sponsor Third Country Training

By Lee Hee Huat
Singapore Port Institute

The Singapore and Japanese Governments have jointly sponsored the Third Country Training Programme (TCTP) on "Effective Management of Port Operations" at the Singapore Port Institute (SPI).

The Japanese Government funds the Programme through the Japan International Co-operation Agency (JICA) while Singapore provides trainers and facilities through the SPI, the training arm of the Port of Singapore Authority (PSA). This year's Programme was the third organised by SPI. The objective of the Programme was to promote regional co-operation through training and sharing of experiences.

At the Opening Ceremony at the World Trade Centre Club on 1 Feb 93, Mr Goon Kok Loon, Deputy Executive Director of PSA and Chairman of IAPH's Committee on International

Port Development (CIPD) officiated the ceremony.

Among the guests were Mr T Hoshi, Resident Representative of JICA and representatives from the Ministry of Foreign Affairs (MFA). Fourteen course participants, mainly senior officers from ports in the Asia-Pacific region, were also present. The countries represented were Bangladesh, Brunei Darussalam, Indonesia, India, Malaysia, Mauritius, Papua New Guinea, Philippines, Solomon Islands, Sri Lanka and Thailand.

In his address, Mr Goon said that participants would have the opportunity to learn about PSA's management, operations and administrative systems because the Programme included visits to PSA's operations departments. These visits would offer first hand observations on operational activities to facilitate exchange of ideas between countries.

Mr Goon also highlighted PSA's commitment to the training of port and shipping personnel. He said, "PSA's training activities have not been confined to our own staff. Since the 1970's, 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 at PSA."

Mr. Goon also made two timely announcements in his speech. He announced that the new Diploma Programme on Marine Operations and Administration would be launched in Aug 93. It is a 5-module Programme jointly developed by SPI and the Maine Maritime Academy in the USA. The Programme will cover marine operations, shipping and port policies, management & administration, maritime safety and maritime law & insurance.

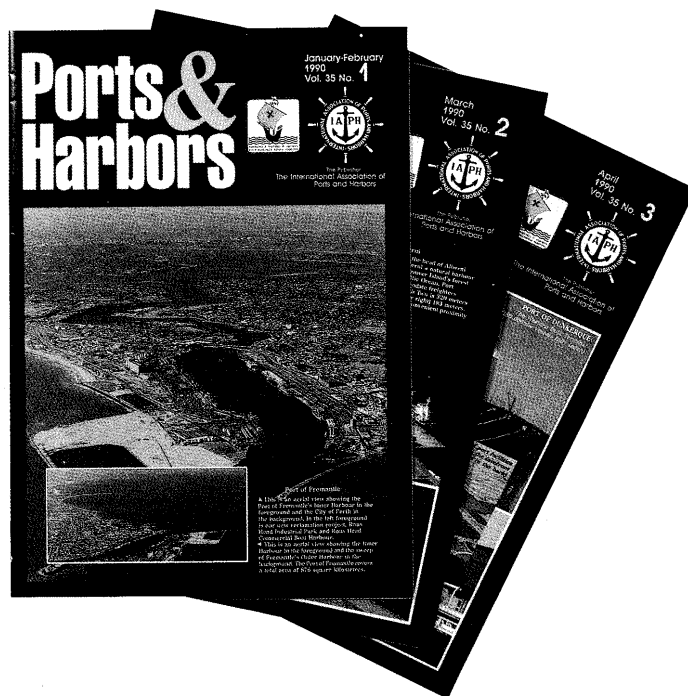
While expressing confidence that maritime organisations would take the opportunity to upgrade the knowledge and skills of their personnel through the new Diploma Programme, Mr Goon also thanked the Japanese Government for funding the Third Country Programme.

(Port View)

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