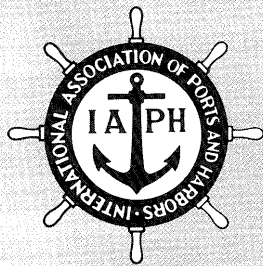
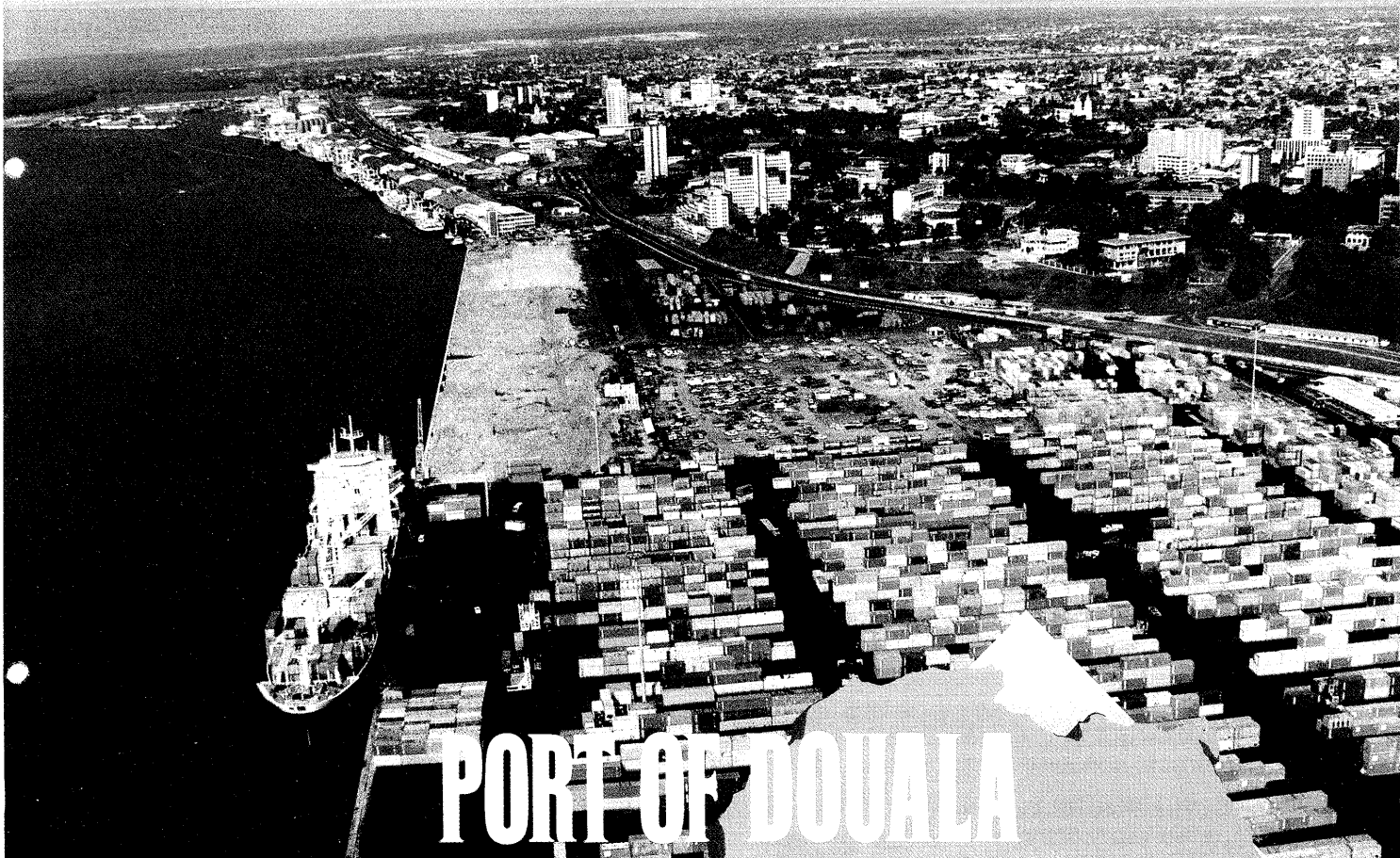


Ports & Harbors

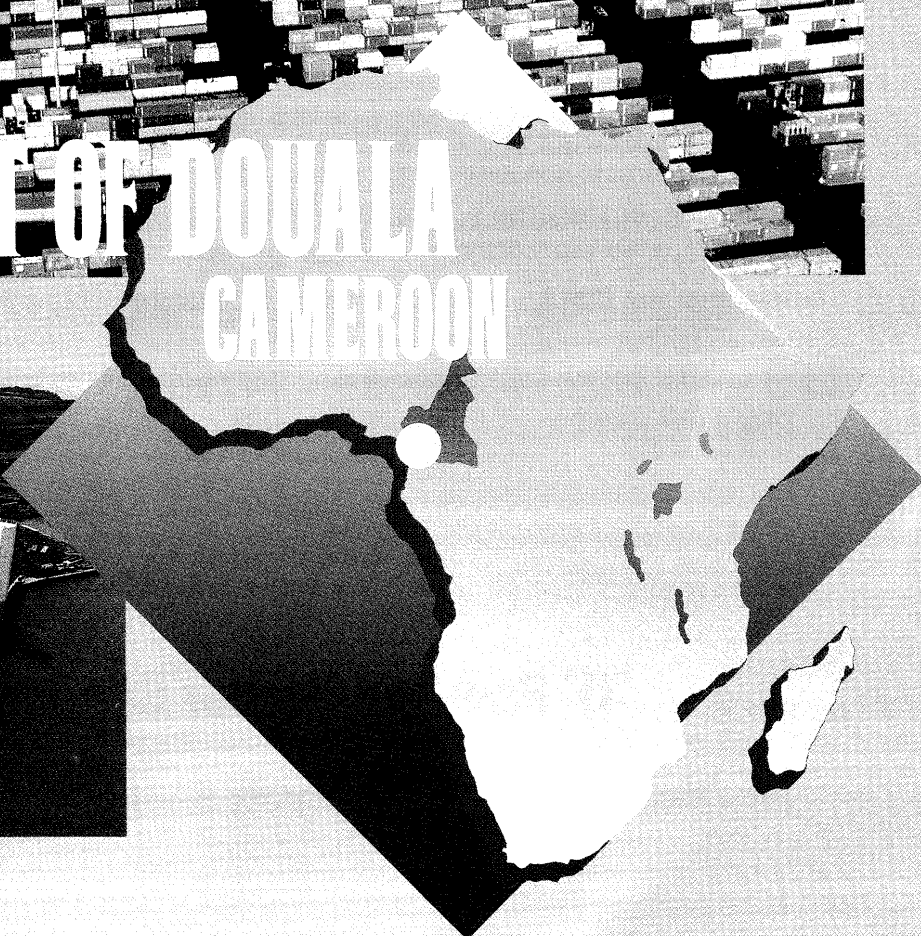
May
1994 Vol. 39 No. **4**



The Publisher The International Association of Ports and Harbors



**PORT OF DOUALA
CAMEROON**



PORT OF KOBE

**Leading host port candidate
for the IAPH World Ports Conference in 1999**



Future Image Figure of Kobe Port

The Port of Kobe has been a leading seaport trading with many countries all over the world. It is also known as the largest container cargo port in Japan, with its two large-scale man-made islands.

Since the organization's foundation, the Port of Kobe has been closely associated with IAPH. Also, Kobe has all the necessary facilities for holding full-scale international conferences and meetings. I believe that the Port of Kobe will be able to organize and conduct the 1999 Conference of IAPH and to meet all participating members' expectations.

I earnestly ask for your understanding and support in selection of the Port of Kobe as the venue of the 21st IAPH World Ports Conference in 1999.

Kazutoshi Sasayama

Kazutoshi Sasayama
Mayor of Kobe

Port and Harbor Bureau, City of Kobe

5-1 Kano-cho 6-chome Chuo-ku Kobe 650 Japan Phone:(078) 322-5670 Fax:(078) 322-6120 Telex: J78548 KOBEPOR

Tokyo Office Phone:(03) 3263-6044 Overseas Offices: London Office Phone:(071) 374-2040
Seattle, Tianjin, Milan, Rotterdam,
Seoul, Taipei, Hong Kong, Singapore, Longbeach

IAPH Officers

President:

Carmen Lunetta
Port Director, Port of Miami
U.S.A.

First Vice-President:

Robert Cooper
Chief Executive
Ports of Auckland Ltd.
New Zealand

Second Vice-President:

Jean Smagghe
Executive Vice-President,
International Affairs of
Association of French
Ports (UPACCIM)

Third Vice-President:

Dominic Taddeo
President & Chief Executive Officer
Port of Montreal
Canada

Conference Vice-Presidents:

Mic R. Dinsmore
Executive Director
Port of Seattle
U.S.A.

John J. Terpstra
Executive Director
Port of Tacoma
U.S.A.

Contents

IAPH ANNOUNCEMENTS & NEWS

Bull Session for Exco Members in Copenhagen • The Mid-term Meetings of The Executive Committee, IAPH: Provisional Agenda	
• AEI: How About Taking a Look at It?	3
An American in Paris With Africa/Europe Regional Officials	4
IPD Fund: Contribution Report	6
Report by Bursary Recipient	7
IAPH Bursary Recipients Announced • Kondoh of Head Office Visits Europe	8
Visitors to Head Office • Membership Notes	9
IAPH and the 13th Conference of IALA	10
Workshop on Spillages of Hazardous Substances	11
Update on Developments in Australia	13

OPEN FORUM

World Trends in the Regulation of Safety at Sea and Protection of the Environment	15
---	----

INTERNATIONAL MARITIME INFORMATION

WORLD PORT NEWS

Ports Canada's 5th International Computer Conference • Conference on Safety in the Port Environment	18
Seminar at Port Training Institute of Le Havre • 8th International Symposium on Vessel Traffic Services	19
New Publications	20
The Americas	
Mike Jones New Chair of Fraser River Harbour • Urban Pressure Affecting Future of North Fraser • Peru to Privatize State-owned Port of Ilo	21
National Port Authority of Panama in profile	22
Port of Corpus Christi: Another Tonnage Record	24
Containers Exempted From State's Use Tax • Cargo Volumes Up at New York-New Jersey	25
Oakland Dredging EIR for Deepening Harbor • Seattle: Pacific Trade Key to Stability, Growth	26
Sea-Land, Charleston Sign New Contract • Tacoma: Computer Simulate Cargo Flow	27
Port of Tacoma Receives Top US Export Award	28

Africa/Europe

Foreign Goods Traffic Increases in Helsinki	28
Mr. Graillot Appointed New Le Havre Head • Celica Presented at Bremen Congress Centre • Hamburg's Tiedemann Speaks in Osaka	29
1993 a Good Year for Amsterdam Port Region	30
Traffic Throughput at Cork Impressive • Associated British Ports Preliminary Results	31
Southampton: Record Volume of Containers • 'River Itchen Study' Winners Announced • Dundee Port Increases Profits and Turnover	33
Dundee: Cruise Trade Set for Growth • Felixstowe: Extension of Trinity Terminal	34

Asia/Oceania

Geelong: First Aussie Rice to Japan in 30 Years • Clinton Coal Facility: High Quality Endorsed	36
Survey Finds Ports Infrastructure Inadequate	37
News from Port of Nanjing	38
7th Pan-Pacific Ports Seminar in Yokohama • Penang: New Terminal Management System	39
PPA Board Okays New Port Charges • Port of Tauranga: No. 1 for New Zealand Forestry	40

Port of Miami Cruise Capital of the World



Contact:

Office of Promotions and Advertising

1015 North America Way

Miami, Florida 33140, USA

Fax (305)347-4843

Phone (305)371-7678



IAPH ANNOUNCEMENTS AND NEWS

Bull Session for Exco Members In Copenhagen

During its mid-term gathering in Copenhagen, Exco members will have a bull session on the afternoon of Tuesday, 31 May 1994. The arrangement has been in progress at the initiatives of the IAPH Officers for the purpose of giving an opportunity for to engage themselves in free discussions on various contemporary issues.

At the moment, it is planned that the bull session will begin with a short speech by three or four members on topics such as

World trade and protectionism

Have the port problems in developing countries something in common with those in wealthy countries? Do the supporters of the environment intend to prevent the ports from expanding?

Is the European Union going to give greater importance to European ports?

The Mid-Term Meetings of The Executive Committee, IAPH

June 1 & 3, 1994, Copenhagen, Denmark

Provisional Agenda

Part One: 0900-1130, June 1 (Wed) at "Port Building"

1. Opening remarks by the President: C. Lunetta
2. Report by the Secretary General: H. Kusaka
3. Report by the Liaison Officer on International Affairs & International Organization Liaison: John Mather
4. Reports by the International Committees
 - 1 Membership: R. Brinson-the current situation-membership campaign
 - 2 Finance: D. Welch-financial prospects-consideration of dues revision-the dues for 1995 and after
 - 3 Constitution and By-Laws: K. Jurriens-revision to By-Laws, if any
 - 4 Consideration of the precautionary wording to be included in the guidelines of IAPH exempting IAPH and its members from possible liability in legal disputes
5. Reports by the Technical Committees
 - 1 Port Affairs Group: Coordinating VP: R. Cooper

Port Planning & Construction: Philip Ng

Dredging Task Force: Dwayne Lee

Port Safety & Environment: P.C. van der Kluit

Marine Operations: John J. Watson

Cargo Operations: J. Terpstra

- 2 Trade Affairs Group: Coordinating VP: J. Smagghe

Sea Trade: Lillian Liburdi

Ship Trends: J.M. Moulod

Combined Transport & Distribution: Goran Wennergren

Trade Facilitation: D.J. Jeffery

- 3 Human & External Affairs Group: Coordinating VP: D. Taddeo

Human Resources: Goon Kok Loon

Legal Protection: Paul Valls

Port Communities: D. Taddeo

6. Report by the IAPH European Representative: A.J. Smith

Part Two: 0900-1200, June 3 (Fri) at "Port Building"

1. Presentations by the hosts on the 19th IAPH World Ports Conference
 - 1 Program
 - 2 Conference Theme and/or sub-themes
 - 3 Conference Chairman/Conference Co-Chairman
 - 4 Registration fees
 - 5 Keynote Speaker(s)
 - 6 Working Sessions (manner, people involved, papers)
 - 7 Languages (simultaneous interpretation services)
2. Resolutions
 - 1 Resolution of Thanks (to the host)
 - 2 Resolutions of Condolences (for deceased colleagues, including Stewart, Simon, Pequegnat)
3. Other matters, if any
4. Closing address by the President: C. Lunetta

AEI: How About Taking a Look at It?

Mr. John J. Terpstra, Chairman of the IAPH Committee on Cargo Operations (Conference Vice President of IAPH, Executive Director, Port of Tacoma), on an extended line of his committee activities related to the application of the AEI (automatic equipment identification), prepared a 13 minute-long VTR tape showing a brief but live case of container terminals where such devices have been installed. The tape was made available to the Committee by the courtesy of Amtech Corporation (device supplier) and Matson Navigation (a user).

The tape will be available upon writing to the IAPH Head Office by specifying the VTR system (NTSC, PAL and SECAM). A sample of the Amtech AEI-tag to be attached to the mobile equipment or containers will also be sent for the first 15 applicants or so.

An American in Paris With Africa/Europe Regional Officials

By José Perrot

Assistant Manager
Port of Le Havre

Carmen Lunetta, President of IAPH, attended the unofficial meeting of the IAPH African/European Region's members, which took place in the offices of the French Ports Association in Paris. For the second year running this meeting was held at the initiatives of Jean Smagghe, 2nd Vice-President of IAPH.

The meeting was attended by 22 members as listed below and the discussion took place in accordance with the following agenda:

Participants:

C. Lunetta (President of IAPH, Port of Miami)
J. Smagghe (2nd Vice-President of IAPH, the French Ports Association)
R. Kondoh (Deputy Secretary General, Tokyo Head Office)
A. Graillot (Port of Le Havre)
J.M. Moulod (Port of Abidjan)
Capt. Guessennd (Port of Abidjan)
J M. Pietri (French Ports Association)
J. A. Lannou (Port of Le Havre)
P. Valls (Chairman of CLP, Bordeaux)
O. Cham (Gambia Ports Authority)
J. Bayada (Cyprus Ports Authority)
G. van den Heuvel (Port of Amsterdam)
F. Palao (Puertos del Estado, MOPU, Spain)

D. Jeffery (Port of London)
P. van der Kluit (Port of Rotterdam)
G. Wennergren (Port of Gothenburg)
M. Hctor (Port of Limerick)
A. Priso (Cameroon National Ports Authority)
L. Ajamil (Port of Miami)
P. Boynton (Port of Miami)
S. Pernotte (French Ports Association)
J. Perrot (Port of Le Havre)

Agenda:

- 1 Welcome by J Smagghe
- 2 Address by President Carmen Lunetta
- 3 Mid-Term Exco Meetings in Copenhagen
- 4 New organization of the Association
- 5 Value of the IAPH resolutions
- 6 Role of IAPH in the Region:
 - * Involvement of the ports of the Region in IAPH activities
 - * Relations between IAPH and ESPO and EC
 - * Africa-Europe relation
 - * Facilitation of the allocation of funds for port staff training periods abroad
- 7 Membership of the Africa/Europe Region
- 8 IAPH/IMO Interface
- 9 SBT tankers
- 10 EDI situation
- 11 Dredging and the Environment
- 12 Information on the Technical Committees activities:
 - * Sship Trends
 - * Legal Protection
 - * Trade Facilitation, EDI situation
 - * Combined Transport & Distribution
 - * Port Safety & Environment
- 13 Other matters



The attendants in the "French Ports Association" meeting room

In his welcoming address, Jean Smagghe expressed his gratitude to everyone attending and stressed that the level of attendance was a good indication of the vitality of the organization in the Africa/Europe Region. Carmen Lunetta underlined his conviction that it was worthwhile maintaining efficient networks within IAPH, the exchanges of views between the different members being highly important.

Today, with the new organization the role of the Vice-Presidents is reinforced to allow better circulation of information. The Technical Committees have always been, and remain, the front line of the Association.

Regarding the Mid-Term Conference in Copenhagen, Mr. Kondoh stated that, as Mid-Term meetings are different from biennial Conferences, it was difficult to plan 12 Technical Committees' meetings. Nevertheless, the Technical Committees will have the opportunity to hold their meetings prior to the Exco meetings, on a separate basis.

As far as the resolutions of IAPH are concerned, Jean Smagghe emphasized that IAPH was the only port association recognized as a worldwide organization. As a consequence, all the IAPH decisions are taken into consideration. Then the danger is that a resolution could be interpreted as a regulation. Fernando Palao stressed that the legal aspect is not so important, the resolutions are important if the organization is important and the number of members in the organization is a major factor. David Jeffery said that IAPH had to be careful when carrying resolutions in which port fees may be involved. Jean Smagghe said that in no case could ports accept that the responsibility of port fees be other than that of port managers. A discussion on the resolution on SBT tankers' port dues followed.

Regarding the membership of the Africa/Europe Region, even if the level is good, Jean Smagghe noted it can be improved. Joseph Bayada has agreed to study the development of the membership in the Mediterranean zone and Göran Wennergren will do the same in the Baltic countries.

As far as the new association of the European ports the European Sea Ports Organization (ESPO)—is concerned, it was set up in early 1993 and became an IAPH Associate Member in June 1993. The ports of each European Union country are represented by three national appointed representatives. A few ports from countries not yet in the EU



A part of the guests at restaurant

are attending the meetings as observers. ESPO being an Associate Member of IAPH, it does not seem that there can be any competition between IAPH and ESPO. On the contrary, today it appears that there is a great deal of strength in being involved in both organizations, the goals being different. The ESPO is the interlocutor of the European Commission. Its activities are focussed on the European aspects of port policy.

Although African ports are well represented, André Priso would be pleased if, through the Sub-Regional associations, the specific circumstances of these ports, which have to face difficult problems in economic terms, could be taken into account. Unfortunately, among the existing three association, only one, PMWACA, is very active. Jean Michel Moulod supported the idea of making proposals within the region to improve communications with European ports.

As far as the allocation of bursaries is concerned, Jean Pierre Lannou stated that, in 1993, 12 requests were received and 4 accepted. To answer André Priso, Mr. Kondoh stressed the problem of funding (difficulties in reaching the target) and the efforts made to simplify the procedures.

Regarding the IAPH/IMO relations, David Jeffery said that the Port Interface Group, set up by IMO, is going more slowly than expected. IMO considers IAPH to be a very professional organization. IAPH's strength is that it represents broad expertise from around the world, which facilitates action. Peter van der Kluit stressed that a certain number of priorities have been listed: reception facilities and technical cooperation, concerning which ports have full expertise. But it requires money and effort to play in that field. IMO appears to be willing to accept IAPH documents as they do not want to reinvent the wheel. Some of the documents have to be updated. Carmen Lunetta asked for identification of the materials which have to be upgraded. That point will be discussed in Copenhagen to help decide on the work schedule to be ready in 1995 for the Conference in Seattle.

Carmen Lunetta said a few words on dredging problems in the US. Ports have to face strong opposition in terms of the environment. That can have dramatic consequences on trade and related economic issues. Carmen Lunetta will ask Erik Stromberg (AAPA) to report on the action of American ports to deal with the situation. He underlined the good job carried out by Dwayne Lee and the Dredging Task Force in representing port interests at the London



Mr Graillot welcoming the guests to the dinner hosted by the Port of Le Havre

Convention.

Jean Michel Moulod (Ship Trends), Peter van der Kluit (Port Safety & Environment), David Jeffery (Trade Facilitation), Göran Wennergren (Combined Transport and Distribution), Paul Valls (Legal Protection) and Michael Hctor (Port Planning & Construction), reported on their committee activities. Work is going on as scheduled. In Copenhagen, during the Mid-Term Exco Meetings, a full report will be made. Jean Smagghe thanked the chairmen and the members for their very positive contribution.

Further to a proposal from Joseph Bayada, Carmen Lunetta recommended that a group be set up to work on IAPH identity and objectives.

At the end of the two-day meetings, Carmen Lunetta expressed his satisfaction at seeing the Africa/European region so dynamic and pushing new projects. He congratulated Jean Smagghe and the participants for their exemplary work. Jean Smagghe thanked all the participants for attending this meeting, and with special mention for President Lunetta and Deputy Secretary General Kondoh.

The IPD Fund: Contribution Report

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

Contributors Paid:	Amount (US\$)
ABP (Associated British Ports), U.K.	3,000
Akatsuka, Dr. Yuzo, Univ. of Saitma, Japan	230
Akiyama, Mr. Toru, IAPH Secretary General Emeritus, Japan	1,000
Auckland, Ports of, Limited, New Zealand	500
Barcelona, Puerto Autonomo de, Spain	1,000
Bintulu Port SDN BHD, Malaysia	200
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
Empresa Nacional de Administracao dos Portos, E.P., Cabo Verde	250
Fiji, Ports Authority of, Fiji	100
Fraser River Harbour Commission, Canada	250
Fremantle Port Authority, Australia	250
Gambia Ports Authority, the Gambia	250
Ghana Ports and Harbors Authority, Ghana	250
Hakata, Port of, (Fukuoka City) Japan	1,705
Halifax, Port of, Canada	250
Helsingborg, Port of, Sweden	500

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
Johor Port Sdn. Bhd., Malaysia	500
Kawasaki, City of, Japan	1,702
Klang Port Authority, Malaysia	200
Korea Container Terminal Authority, Korea	100
KSC (Kuwait Oil Company), Kuwait	1,000
Kudo, Dr. Kazuo, Tokyo Denki University, Japan	4,000
London Authority, Port of, U.K.	500
Maldives Ports Authority, Maldives	100
Marine and Harbours Agency of the Department of Transport, South Australia,	
Australia	150
Marine Department, Hong Kong	500
Maritime Services Board of New South Wales, Australia	367
Mauritius Marine Authority, Mauritius	200
Melbourne Authority, Port of, Australia	1,000
Miri Port Authority, Malaysia	100
Montreal, Port of, Canada	500
Nagoya Container Berth Co., Ltd., Japan	518
Nagoya Port Authority, Japan	3,564
Nanaimo Harbour Commission, Canada	250
Napier, Port of, Limited, New Zealand	100
New York & New Jersey, Port Authority of, U.S.A.	1,000
Niigata, Port of, (Niigata Prefecture), Japan	860
Okubo, Mr. Kiichi, Japan	274
Osaka Port Terminal Development Corp., Japan	570
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
Pusan East Container Terminal Co.Ltd., Korea	200
Qubec, Port of, Canada	250
Shipping Guides Limited, U.K.	500
Solomon Islands Ports Authority, Solomon Islands	100
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\$41,710

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

On Port Management and Operations Seminar

Port of Singapore Institute, Singapore

November 22 to December 3, 1993

Mr. Robert Darku

Recipient of IAPH Bursary in 1993

Ghana Ports and Harbors Authority (Tema)

Introduction

The island of Singapore in South East Asia uses her maritime trade as one of the important lifelines to her economy. As a result, every effort is made to maintain the port as reliable, competitive and safe as possible.

To achieve this objective, the port of Singapore Authority which ranks among the best and busiest in the world, organises a variety of training programmes for its staff and local personnel to enhance their efficiency. In addition, courses are organised for personnel from overseas ports and shipping industries to share in their experiences. Included in these programmes, was the seminar on Port Management and Operations.

Course Structure and Presentation

The seminar was of a two-week duration. It started from 22nd November to 3rd December 1993 and had the objectives of exposing senior and middle management personnel in the Principles and concepts of port management and operations with particular reference to the Port of Singapore's own experiences.

Seventeen (17) participants from six (6) countries participated. Twelve (12) from PT (Persero) Pelabuhan, Indonesia and a participant each from Nigeria Ports PLC, Nigeria; Voltri Terminal Europa SPA, Italy; Miri Port Authority, Malaysia; Marine Department, Hong Kong and Ghana Ports and Harbours Authority, Ghana.

Lectures were given in 30 selected subjects with linkages to the management, organisation and use of resources to ensure high services levels to port users. Among the subjects discussed were:

- (a) Role and significance of ports in maritime transport.
- (b) Shipping trend and development in international trade and their impact on port operations.
- (c) Demand and port capacity forecasting.
- (d) Principles and Concepts of port planning.
- (e) Organisation of port operations.
- (f) Planning of ship operations.
- (g) Conventional cargo documentation procedures.
- (h) container ship, yard and freight station operations.
- (i) Port regulation governing dangerous goods, their handling and storage.
- (j) Port pricing, security and safety.
- (k) Fire prevention and pollution control measures; computer application and marketing of port services.

Port of Singapore Authority as case study for port management and operations

Discussions were based on analysis of the port's capabilities to enable us share in their experiences with regard to its growth and development.

We realised that the port's position as the busiest in

the world had been achieved through the adoption of good management principles in their operation, coupled with accurate forecast of anticipated demand in the provision of facilities.

These facilities are designed for fast handling and quick turn-round of ships with increased efficiency. As a result, the port is able to serve the international trading needs of its own hinterland; compete with several ports for cargo from the hinterland either by transshipment of inland transport and as a pivot for major carriers to discharge cargo intended for other distant ports.

It has also activated industrialisation and commerce with an increased container throughput which reached a record high of 6.35 million TEUs, shipping tonnage of 537m GRT with 70,300 ship calls in 1991.

Observations and Recommendations

It must be emphasised that though the course's duration was short, it made a lot of impact on the participants. We were able to appreciate better, the issue of cost in the maritime industry with regard to time and space. The need for ports to build sufficient facilities especially for bigger ships to save them time was also realised.

In addition, the need for proper information about ships to facilitate their planning and operation with regard to cargo type, storage space and equipment requirement were noted.

Added to this was the maintenance of port safety and a reduction in accidents, which was practised with a well organised safety regulation formulated with a port safety council. This council was to ensure occupational health and safety in the port through a network of safety committees with an industrial health and safety department. To make it operational, port users were issued passes with comprehensive description of their expected roles in the port area which were enforced through intermittent spot checks.

The use of the computer to enhance efficiency, reduce paper work and provide reliable and readily available information was also observed. In addition, its application as a human complement in port policing and security, container handling equipment and warehousing documentation were also stressed.

Consideration may be accorded the following recommendations in port management.

The creation of a freeport with its attendant industrialisation can be given attention to facilitate port expansion and increased throughput.

Secondly, forecasts of the technological environment in shipping, in port development and port demand and facility requirement should be a guide in port projections. Further, an element of flexibility in operations and diversity of use of resources must be a major criteria in port planning, design development and operations.

It would also be of interest for ports to incorporate the IMO standard of "Safe Handling and Storage of Dangerous Substances in Port Areas" in their regulations, since its incorporation by many national and local ports would

guarantee a standardised care of built-in-safety which would contribute to better trade facilitation.

Also for trade attraction, ports should reduce waiting times for services, reduce bureaucracy and be able to handle a wide variety of cargoes.

In sum, I must emphasise that credit must go to the Port of Singapore Authority for their efficient organisation of the programme and for enriching my knowledge in port management and operations.

Finally, I am grateful to the management of IAPH for their assistance which enabled me to participate in the seminar and hope such assistance would be extended to other applications in the future to accord them that exposure.

IAPH Bursary Recipients Announced

Mr. Goon Kok Loon, Chairman of the IAPH Committee on Human Resources (Singapore), has recently announced that he has approved the following individuals as recipients of IAPH bursaries.

(list of recipients and the courses to be attended)

N. Sankunny, Depot Executive	Kelang Container Terminal BHD Malaysia	"Seminar on Improving Container Terminal Operations", IPER, Le Havre, 18-27 April, 94
Salim J. Chingabwi Training Co-	Kenya Ports Autho. Kenya	"30th Int'l Seminar on Port Management, IHE,

ordinator

Delft, Netherlands
17 May-24 June, 94

The Secretary General has arranged for the applicants to receive the course fees and living expenses for a total of US\$3,500 for each recipient through the recipient's chief executive, from whom each application was submitted to the Chairman of IAPH's Human Resources Committee.

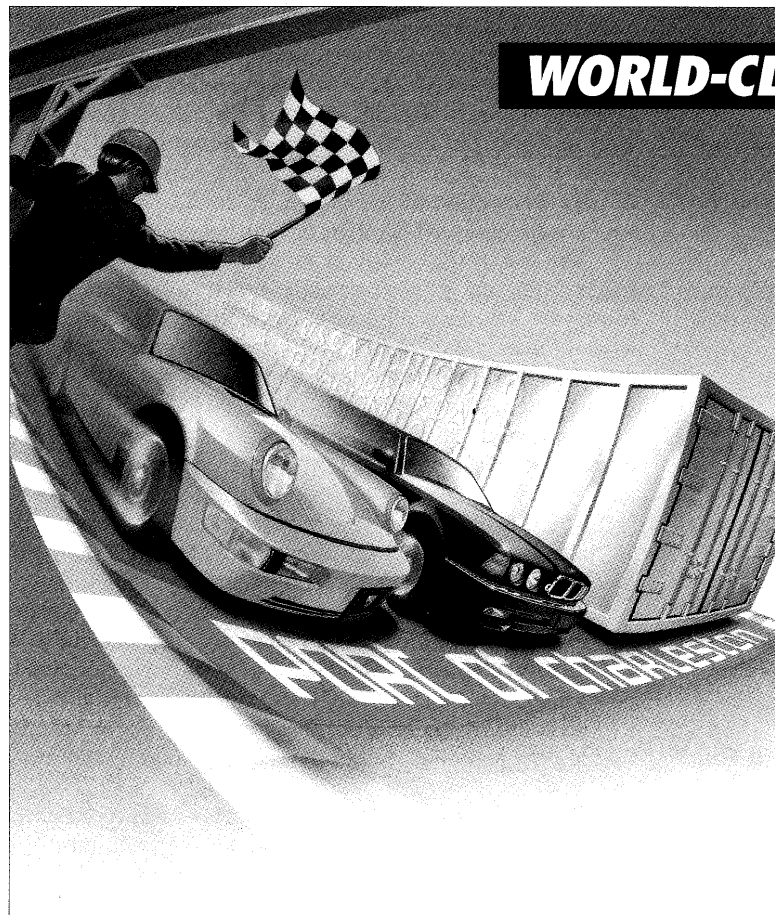
Kondoh of Head Office Visits Europe

Mr. R. Kondoh of the Tokyo Head Office, availing himself of the chance of attending the Africa/Europe IAPH member port officials' meeting held in Paris on 24 and 25 February, 1994, and further to visiting the Port of Copenhagen to prepare for the mid-term meeting of the Executive Committee, visited various friendly institutions and recently established organizations located in Europe to exchange views on items of mutual concern. An itinerary and the officials he visited are as follows:

International Maritime Organization (IMO, London):

Mr. W. O'Neil on March 4, and Mr. David Edwards, Dy. Director, and Mr. Edmond P. Thompson, Head, Oil Pollution Co-ordinating Centre, Marine Environment Division on February 21

Customs Co-operation Council (CCC, Brussels): Mr.



WORLD-CLASS PERFORMERS

The Port of Charleston is known worldwide for exceptional container handling...and our commitment to high quality service has gained for us the job of handling Porsche's very precious cargo...and the future business of BMW.

Why have these world-class performers turned to the Port of Charleston?

- Four major terminals ■ Fast turnaround and short transit to open sea ■ Service to all major trade lanes
- Outstanding intermodal connections for rail & truck
- ORION EDI system - saves two to three days clearance time over other ports ■ 15 container cranes
- Breakbulk, Ro-Ro, and heavy lift capabilities
- Professional support services

You can rely on the Port of Charleston every time. Contact us to find out how we can save you time and money on your cargo.

The Port of Charleston

■ Ryuzo Nakada - Director / Japan
Port of Charleston
Toranomon TBL Building, Suite 902
19-9, 1-chome, Toranomon
Minato-ku, Tokyo 105, Japan
Telephone: 03-3591-1604/5
FAX: 03-3591-0757
Telex: 78133478 SCFEO J33478

■ The Port of Charleston
P.O. Box 817
Charleston, SC 29402, U.S.A.
Telephone: (803) 723-8651
Telex: SC PORTSAUTH 810-881-1860
FAX: (803) 577-8616

Pierre Benet, Deputy Secretary General, and Ms. A. Rigdon, Director, Customs Techniques, on March 1
Baltic International Maritime Council (BIMCO, Copenhagen): Mr. Finn Frandsen, Secretary General, Mr. Flemming Ramsby, Mr. Gerard R. Dik and Capt. Steen Stender Petersen, Deputy Secretaries General, along with Mr. Carl Veng, Director, Port of Copenhagen, on March 3

International Maritime Pilots Association (IMPA, London): Mr. Edgar Eden, Secretary General, on March 4

International Cargo Handling Coordination Association (ICHCA, London): Mr. P. Wigginton, Director, on February 22

British Ports Association (BPA, London): Mr. David Whitehead, Chief Executive Officer, and Mrs. E.M. Redmond, Associate Secretary, on February 21

European Sea Ports Organization (ESPO in Brussels): Mr. F. Suykens, Chairman and Mrs. Pamela Le Garrec, Secretary General, along with Mr. John Raven, formerly IAPH Reporter for CCC, currently Director for Facilitation, International Express Carriers Conference, on February 28. Also, at the ESPO headquarters, the visitor met with Mr. Th. Herman de Meester, Deputy Secretary General, European Community Shipowners' Association.

United Kingdom Major Ports Group (UKMPG, London): Mr. Gordon Johnston, Executive Director, on February 23.

PSO (Technical Services) Limited (PSO, London): Mr. Mike Compton, on February 22. The firm, an Associate Member of IAPH, was formerly known as Port Safety Organization.

During his stay in London, Mr. Kondoh visited the Port of London Authority on February 23 to meet with Mr. David Jeffery, Chief Executive Officer, and Mr. Geoff Adam, Port Promotion to exchange views and information on the planning of the 1997 IAPH World Ports Conference to be held in London. The visitor was welcomed by Sir Brian Shaw, PLA Chairman. On different occasions but during his stay, he visited Sir Keith Stuart, Chairman, Associated British Ports. He also met with Captain John J. Watson, Chief Executive, Dundee Port Authority, and Mr. R. Barclay Braithwaite, General Manager, Aberdeen Harbour.

Visitors to Head Office

On March 7, Mr. Chris Horrocks, Secretary General, International Chamber of Shipping, visited the Head Office and was received by Secretary General Kusaka and his staff. Both Secretaries General engaged in an exchange of views and information on various subjects of mutual interest and confirmed their wishes to increase dialogue for practical cooperation between the two organizations. Mr. Horrocks was visiting Japan to attend Sea Japan 94 - the three-day Conference organized by "Sea Trade" magazine in Yokohama from 9 to 13 March 1994.

On March 10, Mr. R. Kondoh, IAPH Deputy Secretary General, met Mr. Norman Mathews, Secretary-General of IALA, while attending the Sea Japan 94 Conference in



IACS Secretary General Mr. Horrocks (seated left) with IAPH Secretary General Mr. Kusaka and R. Kondo (standing left) and K. Takeda.

Yokohama. Mr. Mathews, who was on his way from Honolulu following IALA's Conference, was visiting Japan to deliver his speech on VTS at the event in Yokohama.

Membership Notes:

New Member

Regular Member

The Malta Maritime Authority (Malta)

Address: Maritime House, Lascaris Wharf
Valletta VLT 01
Mailing Addressee: Mr. Oscar Borg
Chief Executive
Tel: (356) 250360
Fax: (356) 250365

Changes

The Chittagong Port Authority [Regular] (Bangladesh)

Mailing Addressee: Mr. Omar Hadi
Chairman

Antwerp Port Authority [Regular] (Belgium)

Address: Entrepotkaai 1, 2000 Antwerp
Tel: 3/205 2011
Fax: 3/205 2020

Hualien Harbor Bureau [Regular] (China)

Mailing Addressee: Mr. Huang, Ching-Tern
Director

Ports of Auckland Limited [Regular] (New Zealand)

Chairman: Sir Richard Carter

European Community Sea Ports Organisation [Class B] (Belgium)

Address: Avenue Michel Ange 68
B-1040 Brussels
Tel: 32-2-736-3463
Fax: 32-2-736-6325

Les Ports Français — Union des Ports Autonomes et des

**Chambres de Commerce et d'Industrie Maritimes [Class B]
(France)**

Chairman: Mr. J.E. Courtel
Honorary Chairman of the Port of
Nantes/St Nazaire Authority

Board Members: Mr. H. Ravisse
Chairman the Chamber of Commerce
and Industry of Calais
Mr. J. Schutz
Chairman of the Port of Marseilles
Authority
Mr. E. Leloup
Chairman of the Port of Le Havre
Authority
Mr. J.P. Lalitte
Chairman of the Chamber of Com-
merce and Industry of Dieppe
Mr. B. Hanquiez
Chairman of the Port of Bordeaux
Authority
Mr. J. Smaghe

IAPH and the 13th Conference of IALA

By Alex J. Smith

IAPH European Representative

There is an evident affinity of interests in the work programmes and activities generated by IAPH and IALA (International Association of Lighthouse Authorities).

Aids to Navigation, responsibility for the provision and maintenance of which is a pre-requisite of IALA membership, are clearly of particular importance in securing the safe entry and departure of ships to and from the world's ports.

Given also, perhaps, the fact that IALA membership very largely comprises Government Departments, or their equivalent officially designated Lighthouse Services, in some 80 Maritime States, it is reasonable that the ports of these States should be predisposed to liaise with them to ensure that local port operational interests are taken fully into account in their allocation of all too often scarce resources on aids to navigation.

IAPH was represented at the 13th IALA Conference held in Honolulu, Hawaii, from 20 February to 1 March 1994.

A full agenda provided ample scope for participants to examine technical advancements, and explore new techniques and procedures in related fields. The majority of presentations, as would be expected, focussed attention on Visual Aids and Engineering, Radio Aids to Navigation, Energy Sources, Reliability and Availability of Control and Communication Systems. From an IAPH Standpoint, however, sessions on the Organisation and Management of an Aids to Navigation Service, and Traffic Management and Vessel Traffic Services (VTS) were of particular interest. Papers presented to all Sessions are available for inspection at the IAPH Head Office in Tokyo.

It will be recalled that IAPH is a co-sponsor and publisher jointly with IALA and the International Pilots Association (IMPA), of the World VTS Guide. IAPH is also actively involved with these and other organizations,

in developing revised IMO Guidelines on VTS, including a Manual on VTS which, hopefully, will gain general usage in the world's ports.

With regard to the organisation and management of a NavAids Service it will seem somewhat surprising to IAPH members that the concept of Levels of Service has just been introduced to IALA members as an innovative departure from traditional thinking. The concept, after all, is a means of assessing the need for aids to navigation and then balancing those needs with an ability to provide them from available resources.

IALA will be looking to develop the concept and, inter alia, investigate the impact on it of technological developments, such as satellite navigation systems and electronic charting. Ports, for which the Level of Service concept has long been an integral element of their operational ethos, could make a meaningful, pragmatic contribution to these developments.

Traffic management and VTS were seen by the Conference as the ultimate aid to navigation available to an Authority, with particular emphasis on the first of these two ingredients.

It was felt that the effectiveness of traffic management techniques can best be evaluated when set against operational traffic-related data. The IALA VTS Committee will, therefore, examine the circumstances of collecting such data and its registration with a view, ultimately, to develop guidelines.

As regards the VTS Manual to which reference was made earlier in an IAPH context, a first edition of the IALA VTS Manual (sic) was introduced to the Conference with the comment that it would be subject to an on-going review. It is anticipated that a second edition will be prepared for presentation to the next IALA Conference in 1998.

It should be evident that IALA's activities in this regard need to be aligned, so far as practicable, with similar developments within IAPH to ensure that organisations having similar aims and objectives as far as VTS is concerned, are communicating a common message to their respective members. Every encouragement should be given to achieving that end.

A similar situation exists with the subject of mandatory ship reporting, which is an issue currently under consideration by IMO. The IALA view, as agreed at the Conference, is that ship reporting should only be made mandatory for a clearly defined purpose related either to the prevention of accidents or the protection of the environment. IAPH, which



From left, Mr. Norman Mathews, IALA Secretary General, Mr. A.J. Smith, IAPH European Representative and Mr. Michael Pouillot, IMPA President.

like IALA is an active participant at IMO, will want to establish whether that conclusion could form the basis of mutually-agreed policy for dissemination to IMO.

Opportunities were taken at the Conference to consolidate IAPH relationships with other national and international organizations. Useful discussions were held in that regard with representatives of IMPA (The President, Mr. Michael Poullot) and the International Hydrographic Organisation (Mr. Adam Kerr).

Finally, this report would be incomplete without a reference to the friendship shown to IAPH by the President, Dr J van Tiel, Secretary-General Norman Mathews and members of IALA in attendance at the Conference. This was most welcome.

IAPH will have particular regret in noting that Secretary-General Mathews indicated that this will be his last Con-

ference in that capacity because of his impending retirement from office in August 1994. IAPH will wish to join with all his colleagues at the Conference in wishing him all that is best for the future.

Two formal announcements of interest to IAPH were made to the Conference as follows:

- (i) The 14th IALA Conference will be held in Hamburg, Germany, from 9 to 19 June 1998.
- (ii) The 8th International Symposium on Vessel Traffic Services will be held in the Doelen Congress Centre, Rotterdam, The Netherlands, from 15 to 20 April 1996. Mr P Struijs, Executive Director Shipping, Rotterdam Municipal Port Management, Chairman of the Symposium's International Committee gave a related presentation to the Conference.

Regional Marine Pollution Emergency Response Center for the Mediterranean Sea

Workshop on Spillages of Hazardous Substances

Barcelona, 22- 26 March 1994

By P. C. van der Kluit

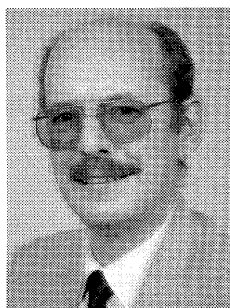
**Chairman, IAPH Committee on
Port Safety and Environment
(Port of Rotterdam)**

The paper is based on the experiences of members of IAPH, the International Association of Ports and Harbors. The issue under discussion here is one which is high on the list of important environmental items.

In 1991 in this very city an IAPH conference covered the same subject. At that time the accident with the Exxon Valdez was still fresh in the minds of everybody. The world witnessed with horror the accident involving the Cypriot tanker Haven, which sank after an explosion and which caused 35,000 tons of oil to run into the sea. Then there was the terrible accident off the coast of Livorno, where the tanker Agip Abruzzo collided with a passenger ferry, causing the death of 141 passengers and the release of nearly 3,000 tons of crude oil. Since then we have witnessed the stranding of the Brear off the Scottish coast resulting in an enormous release of crude oil.

All these accidents happened at sea and ports were not involved. One may even argue that similar accidents in ports are unlikely. So why should ports bother about pollution incidents in their waters? Why bother about the tiny bits of oil and other contaminants which enter our port waters as a result of port and industrial activities? Why spend time on a problem which, compared with the terrible disasters at sea, can hardly be considered to be a serious problem?

Well, these tiny little bits add up to substantial amounts, even though the individual discharges are hardly noticeable.



Secondly, the possibility that collisions or strandings could occur in port approaches or port areas cannot be ignored.

And thirdly, there are the unwanted but unavoidable mishaps during cargo handling which result in spillages.

This calls for a preventive and a repressive approach. However, prevention is not the theme of this workshop, the subject is cure.

What to do if, in spite of all efforts to avoid or minimize pollution, harmful substances do enter the port waters as a result of a release of these substances due to a nautical accident, an operational spillage, a broken connection hose or an overflow during cargo handling?

This very question cropped up in IMO when it was decided to draw up a comprehensive manual on oil pollution preparedness and response as a follow-up to the IMO convention with the same name and its resolutions.

The OPRC convention obliges governments to require authorities or operators in charge of seaports or oil handling facilities to have oil emergency plans in place and operable.

IAPH, as representative of the port community, was asked to produce a draft document on this subject. IAPH responded to that request and our contribution appeared on the agenda of the MEPC meeting in London in early March of this year (1994).

Although the contribution to MEPC addresses governments primarily, the contents of the contribution are based on experience in IAPH ports.

First, some basic principles which IAPH adheres to when addressing emergency plans. IAPH feels that, with four types of emergency plans, the full range of emergencies in ports can be covered. The following categorisation is used:

- * spillages
- * fires and explosions
- * general cargo incidents
- * nautical incidents (grounding, collision, etc)

The basis of the emergency plans, including those for spillages, consists of four elements: plans, procedures, people and material. In the contribution to IMO these four elements are addressed. Now the contribution itself.

It was neither possible nor desirable to draft a comprehensive emergency plan which would suit each and every port.

For that reason guidelines were drafted which may form

the basis for the development of plans for individual ports. Apart from spillages of oil and oil products, guidelines with regard to spills of chemical products have been included as well. The reason for this is that ports would find it difficult to have one plan for oil and other plans for other substances. There are many similarities in the approach and it seemed appropriate to address spillages in general.

An important aspect which cannot be highlighted enough is the fact that the contingency plan for spillages should be inter-related with and complementary to other emergency plans, not only of the port authority but also of other authorities, of private companies and in particular with the relevant national contingency plans. This is important because in most cases irrespective of the nature of the emergency, the combating organization will consist of the same personnel and it would only create confusion if the individual emergency plans followed completely different patterns.

A comprehensive spillage plan includes a number of important elements which are listed below:

- * a detailed list of available cleaning or anti-pollution equipment, their numbers and storage location, what is available and where;
- * agreements with port-related industries about measures to contain spills; Industry should have sufficient means, such as oil booms, to contain spills of up to a certain quantity to be negotiated. The possibility of containing a spill and thus of preventing it from being dispersed creates time for the clean-up organisation to mobilise its equipment and staff and to reach the place of the spillage;
- * names, addresses, etc. of companies specializing in clean-up operations (this may vary with the nature of the product);
- * procedures for on-site inspections to collect data regarding the actual size of the spill, for taking samples and measurements of gas concentrations (important when it concerns volatile products) and for establishing safety precautions for personnel at the site;
- * procedures for evacuating endangered areas;
- * procedures to prevent shipping from accidentally entering dangerous areas;
- * procedures for closing off endangered areas, such as roads, waterways, bridges and tunnels. It is important to note that hydrocarbon vapours are heavier than air and will tend to accumulate at low levels such as tunnels; and
- * procedures for communicating with the media and the public. In principle, one person should be appointed and kept well informed. Avoid letting the media start guessing.

So far the items listed before are in principle relevant to all types of spills. Next, the part which refers especially to spills of dangerous products, either flammable or toxic.

This is a special element in the emergency plan and it requires the expertise of specialists to successfully operate it.

When hazardous materials have been spilled it is important to be able to determine whether a spill will cause danger to the surrounding area. For that purpose calculation models are in existence, which will not be discussed in this paper. Suffice it to mention that these models require the availability of a number of parameters.

First there are the limit values relevant to the safety of people: for flammable products the LEL (Lower Explosive Limit) or a percentage of that value can be used. For toxic products a health limit value should be selected. Here one can think of the LCLO, the Lethal Concentration Lowest, which is the lowest concentration that has been published and is known to have caused death. Another choice could be the IDLH, the Immediately Dangerous to Life or Health concentration.

Whatever choice is made, the limit value should be related to exposures of a relatively short duration. For example, the TLV, the Threshold Limit Value, which is used for judging the acceptability of a concentration throughout the day at the workplace, is unsuitable for this particular purpose.

Other parameters are:

- * the wind direction, which determines the direction in which the dangerous vapours travel;
- * the wind speed, which is relevant to the speed of dispersion and also to the stability of the atmosphere;
- * the water temperature, which determines the rate of evaporation and consequently the amount of vapour being produced per unit of time;
- * the atmospheric stability, meaning the vertical temperature gradient, which determines the vertical dispersion in the less stable being the atmosphere, the stronger the vertical dispersion; and
- * the direction and velocity of the water, which is relevant for choosing the position of the booms and also plays a role in cases of a spill of semi-water soluble products.

The above parameters enable the emergency staff to produce a picture of the endangered area, which is an effective tool when deciding on action to be taken. The calculation model should be used by well-trained personnel and its results should as soon as possible be verified by actual measurements in the field.

Coming back to the emergency plan now, it should also provide a clear overview of the organizations which could become involved and the nature of their contributions.

The size of spills may of course vary considerably. For that purpose a system of categorisation in relation to the resources which are required to combat the spill is introduced.

They range from category A, which can be dealt with by the resources which are available on-site, such as oil booms, to category D, requiring vast resources and assistance from a number of other organisations. It may be necessary that, during the actual combat operation, the circumstances dictate that the response must be up- or downgraded. The plan should take that possibility into account.

So far a matter of crucial importance has remained untouched: the reporting or notification of the incident. No authority can respond effectively if an accident is not reported immediately. Reporting should be compulsory and the port authority should clearly state which data should be communicated. The information received should enable emergency response staff to estimate the severity of the incident and consequently which primary actions and resources are required.

The notification should be made by or on behalf of the ship's master or the shore company where the spill has taken place. It should preferably contain the following data:

- * the location, the name of the vessel and its berth;

- * the name of the product involved in the spill;
- * an estimate of the quantity spilled;
- * the direction of the drift of the spill, if relevant;
- * whether the outflow has stopped or is still continuing;
- * whether people are injured;
- * the name and position of the person making the notification; and
- * the name of the person to be contacted for further information

The notification will be the beginning of the emergency response which I have described earlier in this presentation.

Finally, a number of essential requirements for a successful operation. An emergency response operation is like a military operation and should be organised as such. That calls for a clear command structure. It should be absolutely clear who is in charge. It is recommended that a senior officer be appointed to be in charge of the whole operation, who exercises his authority from a central point, such as the harbour masters office, as well as a lower-ranking officer in charge of the activities on site.

A most important element is communication — not only in terms of equipment, but also in terms of procedures. Messages should be clear and as short as possible. Com-

munication channels should only be used for the transmission of relevant information. It is recommended that all other communications be banned from the channel in use for the emergency, or alternatively that special channels be reserved for use during emergency response operations.

As with so many abilities, the ability to successfully deploy emergency response operations cannot be learned from a book. It takes practice and training to obtain the required skills, not only for individuals but especially in terms of people working as a team. Carrying out exercises will also bring to light possible weak points in the response plan, the communication system or the procedures.

Last but certainly not least in importance is communication with the media. An emergency will almost certainly attract the attention of the press. One should be prepared spokesperson for that. A spokesperson should be appointed and he or she should be the only person talking to the press. This requires a constant flow of information from the response team to that person.

There is much more that could be said about the subject, e.g. the type of actions which are required to successfully combat the variety of possible spill incidents. However, this paper has concentrated on the elements of the plan itself in terms of some of the organisational aspects.

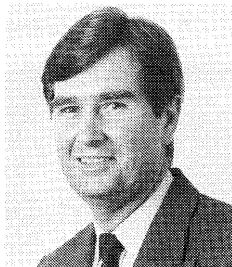
Update on Developments in Australia

By John Hirst

Executive Director

The Association of Australian Ports and Marine Authorities Incorporated

A member of the IAPH Trade Facilitation Committee



(A paper contributed to the meeting of IAPH Trade Facilitation Committee held in New York on November 19, 1993)

1. Sea Cargo Automation

Progress with the trials of Sea Cargo Automation (electronic replacement of documentation for container imports) in Brisbane, continues. It is anticipated that those companies who are involved in the trials at the present time (shipping companies, freight forwarders, customs brokers, container terminals/depots and the Brisbane port) may go live i.e. paperless in early January. With a project of this magnitude there has inevitably been a number of teething problems in the system, which have regrettably compounded over the last months by the Australian Customs Service changing its overall computer platform to a different supplier.

It is planned that trials will commence with Sea Cargo Automation in Sydney from the end of March, 1994. To facilitate this, a working group has been established which is planning how the trial will operate. At the present time

we expect that those companies who are already operating in Brisbane together with a number of other shipping companies and several new freight forwarders etc will take part in the Sydney trial. Once we select these companies we will then "close the door" for 1-2 months until we are satisfied that those participating in the trial together with the Australian Customs Services have a virtual bug free system working. We will then bring in other participants on a live basis. This will require potential participants to have completed a full testing programme prior to end of March.

It is planned that the system will extend to Melbourne, Adelaide and Fremantle hopefully by the end of 1994.

The next stage in Sea Cargo Automation is currently being discussed and there is pressure from a number of quarters for general and break bulk cargo to be added to the system. At this stage there are a number of complexities envisaged with general and break bulk cargo, so it could be that the introduction into this category could be limited.

2. Extension of Tradegate Services

As you are aware Tradegate was established in 1989 by the Australian trade and transport industries peak bodies to facilitate the introduction of electronic commerce to those sectors. Since 1989 improvements in services, mainly in the legislative sector, through the initiatives of the Australian Customs Service have been arranged, but regrettably this concentration has meant that related commercial value added services have reached a less than the expected level of advancement.

This has been of concern to the Tradegate Board and Tradegate is currently carrying out a project to identify, quantify and prioritise EDI and information services required

by the trade and transport sector. The fundamental objective of this project is to establish whether services identified by Tradegate are needed by community members, whether they will improve efficiency and whether they are commercially viable.

The results of these discussions with community members is currently being consolidated. At the same time discussions are underway with the Federal Government to obtain funding to allow Tradegate to pursue these initiatives.

The service areas identified as having a high priority are:

- * Import deliver process — air & sea.
- * Export delivery process.
- * Port/container shipping information

3. APEC Project (Asia Pacific Economic Co-operation)

The Australian Government is a major supporter of APEC and through the Australian Customs Service is taking a major initiative in a proposal to develop EDI systems between APEC members. Tradegate is an active participant in this forum.

The existing APEC EDI project covering export and coastal manifests information between Australian and New Zealand participants is still in trial stages but is working well.

4. Port Information Systems

The development of port information systems in major Australian ports is still in the early development stage. However, two ports, Fremantle and Melbourne are working with a provider to develop simple systems.

The Fremantle system is the most advanced and is sup-

ported strongly by the port community. This system will provide information in the form of bulletin boards containing common information which will be accessed by the community according to their needs. Information will include:

- * vessel arrivals, schedules, principal agent, cargo receipt/delivery times, working arrangements
- * cargo availability, container stops, hazardous cargo, releases/clearances

The Melbourne system, at this stage, provides ships in port, scheduled movements today and tomorrow.

National Consultative Working Group on Transport EDI

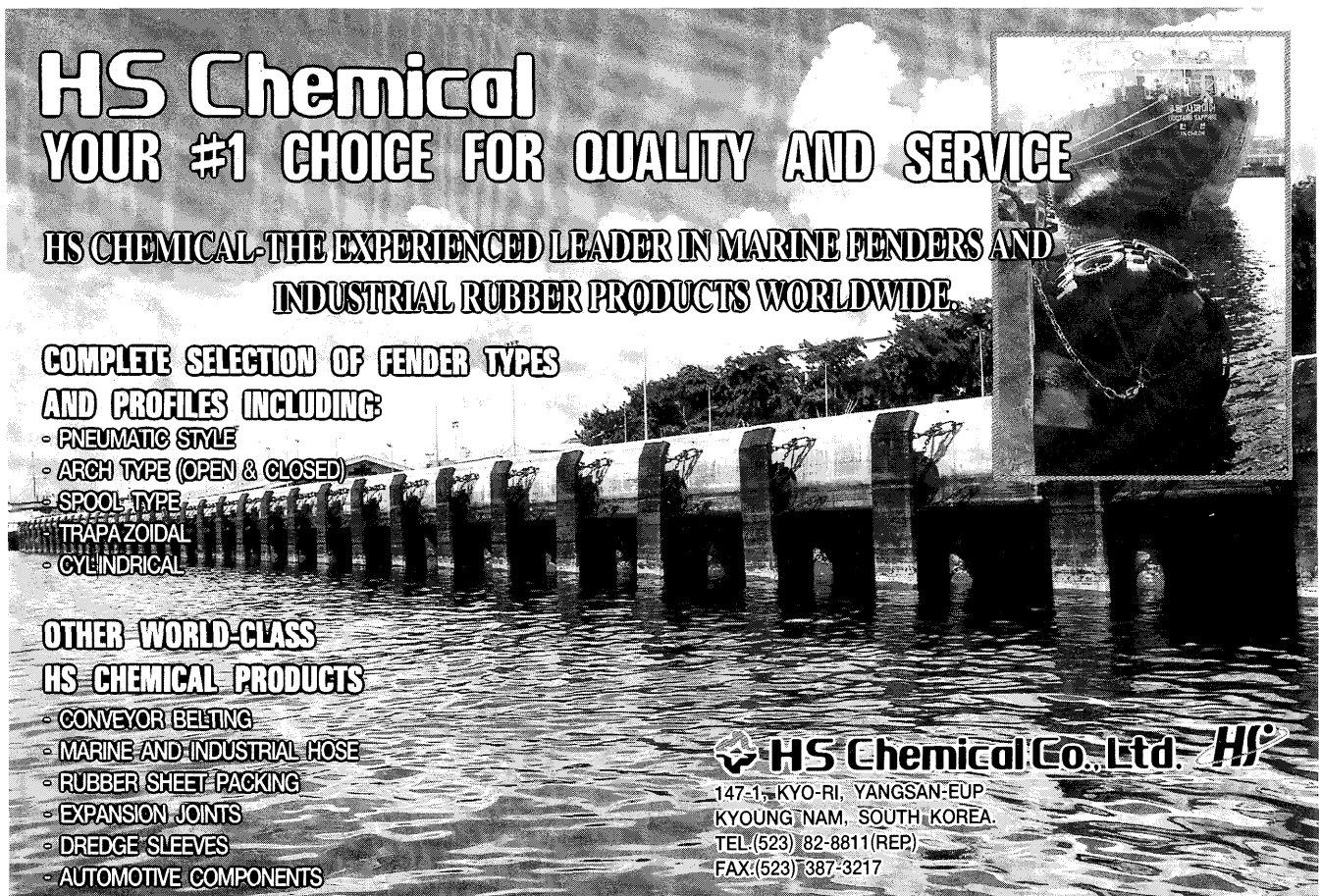
This group was established by the Commonwealth Government to provide a national forum and strategic focus in co-ordinating the introduction of EDI in the transport sector as part of an integrated trading framework.

The terms of reference include:

- * Provide a forum for the identification and resolution of problem areas.
- * Identify potential EDI projects involving the transport sector.

Tradegate is working closely with the EDI Council of Australia to help the Government meet its political needs. Specific activities being undertaken include:

- * Current solution analysis.
- * Establishment of a suppliers forum.
- * Education and training.
- * A focus on impediments.



HS Chemical
YOUR #1 CHOICE FOR QUALITY AND SERVICE


HS CHEMICAL - THE EXPERIENCED LEADER IN MARINE FENDERS AND INDUSTRIAL RUBBER PRODUCTS WORLDWIDE.

COMPLETE SELECTION OF FENDER TYPES AND PROFILES INCLUDING:

- PNEUMATIC STYLE
- ARCH TYPE (OPEN & CLOSED)
- SPOOL TYPE
- TRAPEZOIDAL
- CYLINDRICAL

OTHER WORLD-CLASS HS CHEMICAL PRODUCTS

- CONVEYOR BELTING
- MARINE AND INDUSTRIAL HOSE
- RUBBER SHEET PACKING
- EXPANSION JOINTS
- DREDGE SLEEVES
- AUTOMOTIVE COMPONENTS

HS Chemical Co., Ltd. 

147-1, KYO-RI, YANGSAN-EUP
KYOUNG NAM, SOUTH KOREA.
TEL: (523) 82-8811 (REP)
FAX: (523) 387-3217

OPEN FORUM

World Trends in the Regulation of Safety at Sea and Protection of the Environment

Delivered at Sea Japan 94
International Maritime Exhibition and Conference
(Yokohama, 9-13 March 1994)



By **E.E. Mitropoulos**
Director, Maritime Safety Division
IMO

Introduction

Ever since man first went to sea, seafaring has been one of the world's most dangerous professions and shipping the most international of all industries. Most of the world's international trade is carried by sea on ships of many nations, while oceans and seas, themselves the common heritage of the mankind, are the property — and responsibility — of all.

Until this century, the number of formal treaties dealing with international shipping was surprisingly low. By the middle of it, however, a considerable body of international treaties dealing with maritime safety had been put in place and the creation of the United Nations in 1945 led to calls for the establishment of a permanent international body devoted to maritime affairs, especially safety. The outcome was an international conference in Geneva in 1948 which resulted in the adoption of a convention establishing the International Maritime Organization (IMO) as a specialized agency of the United Nations system.

The main objectives of IMO are to facilitate co-operation among governments in the field of governmental regulations and practices concerned with technical matters of shipping in order to achieve the highest practicable standards relating to maritime safety, efficiency of navigation and prevention and control of marine pollution from ships; and the consideration of legal matters related thereto. Over the years the Organization's responsibility of providing technical assistance to developing countries in the above matters and, in addition, dealing with maritime traffic facilitation issues has grown steadily to become tasks of significance and

importance.

The conventions adopted by IMO provide a comprehensive series of measures covering issues of safety, pollution prevention, liability and compensation. These conventions were all adopted during a period of less than two decades. Some, such as the SOLAS and Load Line Conventions, were new versions of conventions adopted before IMO came into being. The majority, however, were developed entirely within the IMO forum.

Over the years, IMO has continually evolved to meet changing conditions and requirements. In its early years it was primarily concerned with the formulation of international conventions and codes. In 1981, the IMO Assembly adopted resolution A. 500 (X11) which outlined the objectives of the Organization in the 1980s and called for a breathing space, for time to enable everyone, particularly developing countries, to catch up with the new regulations that IMO had produced, to formulate national rules and regulations for the effective implementation of IMO conventions and for the maritime industry to comply with them. This resolution was reaffirmed for the '90s. In fact, "implementation" has become the main challenge to IMO before the dawn of the next millennium. This will require an effective flag State implementation, port State control, observance of the International Safety Management Code, survey and inspection of ships and, of course, raising the quality and competence of the human element in shipping.

Having established IMO's competence as the world body responsible for the adoption of maritime safety and environmental protection standards, this paper will address its subject from the viewpoint of IMO's activities in the respective fields.

Business as usual?

After a decade in which the number of serious casualties at sea had steadily declined, the trend began to move in the opposite direction at the beginning of the 90s. The "Herald of Free Enterprise" and "Exxon Valdez" disasters of the late 80s were followed, in the early 90s, by the "Scandinavian Star" fire casualty and the loss of an alarmingly high number of bulk carriers, some without trace.

It was against the background of those tragic accidents that the Oslo Summit on Safety at Sea was convened in April 1991 to review the approach to maritime safety in all sectors of the industry, important developments affecting safety at sea, transport and strategies for the future.

* Views expressed in this paper are those of the author and should not be construed as necessarily reflecting the views or policies of IMO or its Secretariat.

The most important conclusion reached by the Summit was that maritime safety is the collective responsibility of everyone concerned with shipping, is the product of actions by all industry sectors and can be threatened by weakness in any one of them.

The Summit emphasized the necessity for international standards, as opposed to national requirements being unilaterally imposed and the need to concentrate on the human element and safety management. The critical importance of efficient maritime Administrations to the effective implementation and enforcement of safety standards was also emphasized, as well as the importance of the role played by classification societies.

Important weaknesses, in the overall structure of maritime safety and pollution prevention, identified by the Summit, were the continuing operation of sub-standard ships, sub-standard flag Administrations, abdication of responsibility by Administrations, the lack of uniform application of standards on a global basis and the heavy reliance which, therefore, had to be placed on port State control.

Stressing the collective responsibility of everyone concerned with shipping in ensuring safety at sea and protection of the marine environment, the Secretary-General of IMO declared it could no longer be "business as usual" and, since then, has taken, with the support of the Member Governments of IMO, a number of initiatives which, in their totality, constitute the framework of the policies and trends which, at present, dictate and influence IMO's decisions in the vital area of regulation of safety at sea and protection of the marine environment from pollution from ships, as will be explained in the ensuing paragraphs.

New policies

In introducing the work of IMO's Maritime Safety Committee over the period 1991 to 1993 to the Organization's eighteenth Assembly in October/November 1993, the Committee's Chairman explained that, although the work of the Committee, during the period under review, was influenced by, and reactive to, a number of serious casualties, which had resulted in loss of lives and/or pollution of certain sea areas, it was also directed towards new policies and related areas of activity, such as:

- a proactive policy, so that trends which might adversely affect maritime safety may be identified at an early stage and action taken to prevent them being developed;
- a policy to bridge, to the extent possible, the gap between new and existing ships' safety standards, as the work of the Maritime Safety Committee on tanker design, ro-ro passenger ferry damage stability and passenger ship fire protection could clearly demonstrate; and
- the work on the role of the human element in maritime casualties and, in particular, the development of the International Safety Management Code for the operation of ships and for pollution prevention.

As far as the second of the above policies is concerned, the Maritime Safety Committee agreed that there was a need to reduce the ever increasing gap between standards of safety requirements for new ships and those for existing ships and recognized that it was not possible to apply the same level

of requirements for new ships to existing ships. Accordingly, the Committee instructed all sub-committees, when preparing amendments to conventions, codes and recommendations, to thoroughly discuss their application to existing ships so as to ensure they meet satisfactory safety standards and to review the existing ship safety standards. The Committee also requested the sub-committees to report on the extent of any significant differences between requirements for new and existing ships and to recommend, as appropriate, whether action could readily be taken to reduce such differences by upgrading the safety standards of existing ships. In addition, the Committee instructed all sub-committees to look into matters left "to the discretion of the Administration" with a view to determining whether explicit requirements could be devised in such cases.

Examples of the work carried out within the two first of the above policies are:

- in the context of the "Herald of Free Enterprise" accident, the adoption of amendments to the SOLAS Convention on operational, equipment and structural requirements for both new and existing ro-ro passenger ships;
- in the context of the "Scandinavian Star" accident, the adoption of amendments to the SOLAS Convention on fire protection requirements for both new and existing passenger ships;
- in the context of the "Exxon Valdez" accident, the adoption of amendments to the MARPOL Convention on the design of new and existing tankers and the introduction of an enhanced programme of inspections during surveys of bulk carriers and tankers, etc.

Another example of application of the pro-active policy of IMO is the inclusion in the International Convention on Oil Pollution Preparedness, Response and Co-operation, 1990 of provisions calling for:

- 1 the designation of competent national authorities to deal with oil pollution incidents;
- 2 the availability of pre-positioned oil spill combating equipment, detailed plans and communication capabilities and a mechanism to co-ordinate the response to an oil pollution incident by, *inter alia*, mobilizing the necessary resources; and
- 3 the provision of information concerning national or regional preparedness and availability of equipment and services, including marine salvage capability and the availability of national contingency plans.

The recent work of IMO to prevent and suppress acts of piracy and armed robbery against ships may also be considered within the framework of the respective policies of the Organization.

In the area of work on the role of the human element in maritime casualties, the focus of IMO is directed towards revising the STCW Convention. The 1978 Convention on Standards of Training, Certification and Watchkeeping for Seafarers is potentially second in importance only to SOLAS itself, at least in the safety field, yet, even when it was adopted, it was regarded as something of a compromise and since then its importance and relevance to modern shipping needs has been eroded by changes which have taken place in the

industry and in the training field.

IMO has now begun a major review of the Convention which will, it is hoped, result in the majority of the text and its principles being rewritten. These amendments are expected to be adopted in 1995 and come into soon after that.

When this has been achieved, the crew standards should improve provided that everyone involved plays his part. IMO's task is, of course, to set the standards.

Governments will then have the task of implementing them and that is especially important in the case of the STCW Convention because a great deal of reliance has to be placed on the certificates of competency which Governments issue.

If all Governments take this responsibility seriously and ensure that examinations are fair and rigorous and that certificates are only awarded to those who have genuinely earned them, then there should be no problem.

No matter where they are issued, certificates will be respected as a proof of ability and shipowners will be able to rely on them when selecting crews. It is therefore crucial that national certification practices must be above reproach, must be open to scrutiny and perhaps should be subjected to a quality assurance review independently conducted.

The maritime academies will also have a key role to play. They provide the training upon which the certificates depend and it is essential that this training is of the highest quality throughout the world. The STCW Convention provides the basis for maritime training and IMO has also produced a series of model courses, based on the Convention, which are now widely used around the world.

Training is changing rapidly, thanks to technology; and the changes provide both challenges and opportunities.

The use of simulators is becoming more widespread than ever and is now virtually a necessity; the STCW revision will certainly take it into account. It is vital that training academies keep abreast of the changes now taking place and it is important that the maritime community as a whole ensures that they do so.

The review of the STCW Convention is being carried out as a matter of urgency not only because high crew standards are vital, but because there is a good deal of concern about shipping safety in general and the environment is also a much bigger issue than it was a few years ago.

Concluding remarks

Over the last few years IMO has initiated a number of measures to improve maritime safety and prevent pollution from ships as well as to ensure that existing regulations are widely and effectively implemented.

Older ships, which are built to technical standards that have often been superseded as a result of amendments to international safety conventions, are statistically more prone to accidents than younger ones. IMO has already introduced requirements for the mandatory upgrading of older tankers and passenger ships including ro-ro passenger ships.

The mandatory enhanced inspection scheme under MARPOL 73/78 for tankers will eventually lead to sub-standard ships being scrapped early. Draft amendments to SOLAS in respect of the enhanced programme of inspections for bulk carriers and oil tankers would, when adopted in May 1994, ensure that only those ships which are structurally sound and operationally safe will remain in service.

Although calls have been made for ships to be scrapped at a certain age (whatever their condition), world shipyard capacity is much smaller than it was a decade ago and

replacements could not be built in sufficient quantities to meet the demand. The lack of shipping would have a damaging impact on trade and the world economy as a whole. The IMO measures have taken this into account and are intended to ensure that the phasing-out process is realistic, beneficial to safety and the environment and also technically and economically feasible.

If the calls for the ships to be banned on the grounds of age, type or flag were to be transformed to action, this would do nothing to improve maritime safety. It would simply lead to divisions within the shipping community that do not at present exist. The confrontation approach would soon see the shipping world divided into a series of national or regional groups, each developing its own regulations and seeking to impose them on everyone else. Ships would face the possibility of having to meet different standards for identical activities in different parts of the world. The result would be chaotic and ultimately maritime safety and the marine environment would be harmed.

The existing regulatory regime by IMO, implementation by flag States and enforcement by port States has proven successful and the number of accidents and pollution incidents has gone down over the years. Nevertheless, it depends upon all those involved playing their part and there is a great deal more that can be done. However, there appears to be little need for the adoption of still more unenforced regulations.

It is generally agreed that implementation is presently the most important factor and Governments must concentrate on ensuring that existing IMO regulations are fully complied with and effectively enforced. The new IMO Sub-Committee on Flag State Implementation (FSI) was set up in 1992 to deal specifically with this subject.

By the proposed mandatory application of the International Code for the Safe Management of Ships and for Pollution Prevention, IMO is setting rules for the organization of company management and the implementation of safety management systems. The Quality System Certification Scheme of IACS will be a complementary measure in this direction.

A critical situation is developing because of lack of trained personnel to man the ships at sea. This will worsen unless action is taken now to strengthen and provide financial support for training facilities in those developing countries which now supply the bulk of the seafarers.

Often in the aftermath of a serious accident resulting in loss of lives and property at sea and damage to the environment, suggestions are made that action be taken outside IMO unilaterally or on a regional basis. The accusations made in this context on IMO's method of work are mainly ill-founded as the technical bodies of the IMO are making strenuous efforts to achieving the ultimate goal of safer shipping and cleaner oceans. The consideration and adoption of any appropriate standards must be taken by IMO as it is only through wide and effective implementation of international regulations developed through IMO that maritime safety and pollution prevention will be enhanced to the benefit of all concerned.

The following extract from the opening speech of the Secretary-General of IMO to the 62nd session of the Maritime Safety Committee summarizes the situation in the most eloquent manner:

*"Although there are tangible results from the steady
(Continued on Page 18)*

International Maritime Information

WORLD PORT NEWS

Ports Canada's 5th Int'l Computer Conference

June 8 - 9, 1994
Sheraton Centre
Toronto, Canada

In association with
 American Association of Port Authority (AAPA),
 EDI Council of Canada,
 International Association of Ports and Harbors (IAPH) and
 Total Electronic Commerce Service for Transportation (TECST)

Conference

Ports Canada's Fifth International Computer Conference will cut through the hype of the computer industry and bring together the world's most senior transportation industry IT practitioners. The conference will focus on transportation-specific applications of information technologies of all types including: database, electronic data interchange, satellite communication and tracking, geographical information systems, imaging, artificial intelligence, simulation, automatic equipment identification and electronic commerce.

Toronto '94

The Fifth International Computer Conference will be the lead-up to the 22nd ICHCA International Biennial Conference, Exhibition and General Assembly that will be held in conjunction with Ports Canada's renowned International Business Conference from June 13 - 16, 1994 at the Sheraton Centre Toronto Hotel and Towers. The theme for the latter conference is *2001: A Transportation Odyssey*.

This world-class conference will be the largest transportation conference

ever held in Canada. As part of the program, there will also be a trade exhibition that will attract exhibitors from all around the world and offer a rare opportunity for industry to promote its products and services.

For further information, please contact:

Ports Canada
 Tel: (613)957-6732
 Fax: (613)996-9629

Conference on Safety In the Port Environment

Impact of Port Services on Safety and the Environment Bremen, 10 to 12 Oct. 1994

Hosted by: The Senator of Ports, Shipping and Foreign Trade

Sponsored by: International Maritime Organization, Baltic and International Maritime Council

In co-operation with: EBA, EHMA, IAPH, ICHCA, IFSMA, WMU

Supported by: Federal Ministry of Transport

Organized by: Port and Transport Consulting Bremen GmbH

Att.: Mrs. B. Mühlbrandt
 P.O. Box 10 79 65
 D 28079 Bremen/Germany
 Phone: +49 421 3983805
 Fax: +49 421 3983698

Preliminary Programme

Sunday evening, 9 October
 Reception by Senate of Bremen

Monday, 10 October

10.00 Opening
 11.15 Keynote presentation 1: Quality assurance of port services

12.15 Lunch hosted by Senator of Ports, Shipping and Foreign Trade

14.15 Keynote presentation 2: Correlation of ship and port safety

15.15 Keynote presentation 3: Safety of port approaches

16.15 Keynote presentation 4: The implementation, utilization and cost recovery for reception facilities in a multi-purpose port

Tuesday, 11 October

09.00 Two separate and parallel working groups on the following subjects:

12.00 Group 1: Quality assurance of port services and

Group 2: Correlation of ship and port safety

14.00 Technical visits to selected port service centres, activities and sources of the ports and port approaches of Bremen and Bremerhaven

Wednesday, 12 October

09.00 Two separate and parallel working groups on the following subjects:

to Group 3: Safety of port approaches and

12.00 Group 4: The implementation, utilization and cost-recovery for reception facilities in a multi-purpose port

14.00 Plenary discussion and summary of results

16.30 Closing by Senator of Ports, Shipping and Foreign Trade.

(Continued from Page 17, Col. 2)

improvement in constructional, operational and cargo safety standards coupled with strenuous efforts to protect and preserve the marine environment from pollution from ships, one accident is enough to provoke strong criticism of the shipping industry and the technical standards regulating it.

There is rarely a good word said for those who invest heavily in ships; for those who design, build, operate

and manage them; and for those who man them, take them to sea and bring them safely to port.

The message I want to convey is that the shipping industry is not in as bad a shape as is often described in the aftermath of a serious casualty. On the contrary, considering its achievements and its success in accomplishing its objectives, I believe shipping is an industry to be proud of and not a single opportunity should be missed to emphasize it."

Seminar at Port Training Institute of Le Havre

Private Sector Involvement in Ports: Opportunities and Challenges (16 to 20 May)

More private sector involvement, often erroneously called privatization, is presently considered by many Governments, Port authorities, International lending Institutions and Port Consultants as the panacea for solving all managerial and operational problems a port may be facing to-day. Clearly, private sector participation in some well-defined areas of management and operations may generate some substantial benefits for the national economy, such as the avoidance of further government investments in port infra- and super-structure and equipment, the increase of the port's operational efficiency, the lowering of the port tariff levels, the faster adaptation of the port's services to user demand, the streamlining of the labour force, etc. However, no policy aiming to increase the role of the private sector, will be successful unless a number of preliminary conditions are satisfied and the proper strategies and procedures are implemented.

The objective of this seminar is to study these prerequisites for an effective private sector involvement in ports, to detail the potential benefits and disadvantages, and to present a methodology for the development of suitable strategies. In particular the seminar will look into the structure of possible agreements between the public and the private sector. Finally, the seminar will consider the possible role of the Port Authority when private companies have taken over most or all of the operational responsibilities. To illustrate the conceptual notions and theoretical concepts the seminar will present a number of actual case-studies of port "privatization", examine their salient features and analyse the way in which the most serious obstacles to private sector participation were lifted.

Port Competition: Issues and Strategies (24 to 27 May)

To determine key factors in port competition. To analyse the competitive advantages of a port and formulate strategies for their realisation. To analyse the relationship between terminal operators (taken in the widest possible sense)

and their main users (shipping lines, forwarders, transport operators).

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

To survey existing terminal contract conditions.

To propose methods, techniques and arrangements for containing commercial risks. To detail terminal contract conditions which are mutually beneficial to terminal operators and users.

Port Finance (31 May to 10 June)

The seminar will endeavour to explain the basic principles of port finance and the reasons why it is essential to have financially sound objectives.

Sound financial management enterprise implies that all investments, whatever the sources of funding must be made profitable. The financial techniques available to ensure this objective will be studied.

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

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

Port Management Information Systems (20 to 24 June)

Increasingly port authorities and private port operating companies are introducing total quality management principles in order to enforce their competitive position and satisfy their customers ever increasing demands. However, the aim of modern ports and terminals to offer the highest possible quality services and meet shipping lines and cargo owners service requirements necessitates the complete mastery over management and operational systems.

This can only be achieved through a comprehensive, effective, and cost efficient management information system (MIS). This seminar aims at presenting the elementary ingredients of a MIS, to propose a proper methodology for collecting and analysing data, to discuss potential problem areas, to analyse past

MIS applications and to assess the required inputs to establish a performing system.

For further information, please contact:

The Port Training Institute of Le Havre (IPER)

30, Rue de Richelieu
76087 Le Havre Cedex-France
or telex: 779663 F
or telefax: (33) 35.41.25.79

8th Int'l Symposium on Vessel Traffic Services

April 15-20, 1996

Doelen Congress Centre

Rotterdam, The Netherlands

Symposium Theme: The theme "Vessel Traffic Services as a Tool of Management" offers the basis for interesting papers and fruitful debate. The keynote addresses are in the highly capable hands of Mr. William O'Neil, Secretary-General of the IMO (International Maritime Organization) and Dr. Jan van Tiel, Director of the Dutch Directorate-General of Shipping and Maritime Affairs.

Symposium Programme: The symposium programme will be developed on the basis of five sub-themes:

- * VTS and Economics
- * VTS and Logistics
- * VTS and Environment
- * VTS and Safety
- * VTS and Technology.

In five sessions these sub-themes will be addressed in detail. The preliminary programme of the sessions is as follows.

1. Lessons to be learned, jurisprudence
2. International developments
3. Assessment related to operational benefits efficiency aspects
4. Training and simulation
5. Research and development

For further information, please contact:

VVV Congress Bureau
Attn. Mr. A. de Mooij
Coolsingel 67
3012 AC Rotterdam
The Netherlands
Telephone +31-10-402 3200
Fax +31-10-413 0124

New Publications

Containerisation International Yearbook 1994

The future for individual container carriers hinges on securing cost advantage and satisfying customer's needs. Failure to seize either or both of these opportunities will ultimately condemn carriers, whatever their niche or global coverage, to commercial oblivion.

Summarising the situation in her preface to *Containerisation International Yearbook 1994*, editorial director Jane Boyes comments "With virtually all routes containerised, the opportunities for growth are now primarily a function of an expansion in world trade". Trade growth will be at best patchy in 1994 and while analysts suggest a 6% per annum rise in container volume in the next few years, this is unlikely to absorb shipboard overcapacity.

While cost control, economies of scale offered by larger vessels and strategic alliances will increase their chances of survival, operators must also continue to be less asset-focused and more customer-driven. "This presents a host of opportunities for an industry which has only relatively recently realised that it is in the service business. For global operators the challenge is to think globally but at the same time to act locally".

The theme of larger vessels is taken up by Adrian Bascombe, shipping editor, who recorded 31 vessels of 4,000 TEU-plus capacity in service and another 43 on order at the start of November 1993. Overall capacity of the world containership fleet totalled 3.7 million TEU in service with another 490,000 TEU scheduled for delivery by 1996.

Pressure to provide bigger and better shoreside facilities to service container vessels continues, notably in the Far East. In 1992, the port of Hong Kong once again overtook Singapore, as shown in the Yearbooks's latest *World Container Port Traffic League*. Justin Twelftree's analysis of port statistics for more than 400 locations worldwide shows that over 100 million TEU were handled in 1992, a

year-on-year increase of nearly 8%.

A summary of "Cargoware International" magazines's recent survey of port handling equipment in service and on order is given in this latest Yearbook. ("Cargoware International" is a sister publication to "Containerisation International" magazine.) The world's fleet of 2,000 yard gantry cranes and 2,100 straddle carriers is analysed by location, age and manufacturer.

"Cargoware International" editor Andrew Foxcroft also looks at trends in the container manufacturing and leasing sectors. After seven years of growth averaging 20% a year, the box building sector took a severe knock in 1993 with output falling 13% from the 1992 level, but the prospects look brighter for 1994. Meanwhile, a number of important mergers took place in the leasing sector during 1993.

Inland developments in Europe and Mexico are discussed in features contributed by "Containerisation International" magazine's writers. While growth in intermodal traffic between US/Canada and Mexico is predicted to continue, demand for European road/rail transport has stagnated despite upgraded services and fewer legal restrictions.

For the 1994 edition of *Containerisation International Yearbook*, over 600 new companies have been added to the comprehensive reference sections covering all aspects of the intermodal transport industry. Categories include shipping lines, a detailed register of more than 5,000 container vessels, ports, equipment manufacturers, container lessors and repairers, and software houses.

Containerisation International Yearbook 1994 is published by Emap Response Publishing Ltd and is available from: — Readerlink Ltd

Audit House, 260 Field End Road
Ruislip, Middx HA4 9LT, UK

Tel: +44 (81) 868-7618

Fax: +44 (81) 866-5155

Prices: £125 within the UK; airmailed to Europe £150; airmail outside Europe £180

For further information contact
Mark Lambert (Editor)

Tel: +44 (71) 404-2763

Fax: +44 (71) 404-2765.

Telex: 263879 NATMAG G.

The Shipping Statistics Yearbook 1993

482 pages, 435 tables, 110 graphs
ISSN 0721-3220

Price: DM 275.-plus packing and postage and in case of inland sales plus VAT (MWSt.)

The *Shipping Statistics Yearbook 1993* published by the Institute of Shipping Economics and Logistics is now available.

The ISL Yearbook is a unique statistical reference source for the world's maritime industry and anyone whose business is affected by developments in the maritime sector. The publication, compiled by experts of the institute's Empirical Shipping Research Department, is designed to meet particularly the requirements of shipowners, shipbuilders/repairers, port authorities, brokers, banks, transportation consultants, research institutes as well as maritime organizations.

The large amount of sifted and processed statistical data makes the yearbook a valuable authority most useful as an instrument for market analysis. Market-oriented key facts and figures on shipping, shipbuilding and ports are provided, using in-house data files and hundreds of shipping related information. These analytical background data inform on:

Shipping Market

- Analysis of total world merchant fleet, laid-up and broken-up tonnage as well as special fleets
- Presentation of key figures on world seaborne trade and world trade development
- Detailed overview on nearly 30 major commodity markets
- Long-term series on freight rates
- Profiles of major shipping countries

Shipbuilding

- World shipbuilding returns indicating ordering activities and output figures
- Information on the current situation of major shipbuilding countries

Ports and Sea Canals

- Port surveys on worldwide shipping and cargo traffic structures including a detailed container traffic analysis; figures are ex-

tracted from the ISL port data base

- Shipping and freight traffic attributable to the world's major sea canals

The yearbook supplements the ISL's monthly market figures now entitled "ISL Shipping Statistics and Market Review". For 1994 this monthly publication got a new concept.

Orders should be addressed to:

Institute of Shipping Economics and Logistics (ISL)

Universitätsallee GW 1, Block A
28359 Bremen

Tel.: +49-421-22096-43

Fax.: +49-421-2209655

Dictionary of Shipping Terms, 2nd Edition

In January Lloyd's of London Press published the second edition of *The Dictionary of Shipping Terms*. The dictionary has been comprehensively updated and now contains over 200 additional entries including definitions relating to cargo handling and specialist ship types. The author Peter Brodie has written several other well respected shipping books and dictionaries. His wide business experience including work in shipping, marine insurance, export and banking, has given him a special insight into the kind of explanations needed by those working both in and with the shipping industry.

Dictionary of Shipping Terms, 2nd Edition

Peter Brodie, 1 85044 5311, Hardback, 200pp approx, £18.00

For more details on the *Dictionary of Shipping Terms, 2nd Edition* please contact Legal Publishing, 27 Swinton Street, London, WC1X 9NW Tel: 071 833 8933, Fax: 071 833 5521

The Americas

Mike Jones New Chair Of Fraser River Harbour

Michael J. Jones, B.Sc. P.Eng. M.B.A., Surrey, B.C. was elected chairman of the Fraser River Harbour

Commission at a recent meeting of the commissioners. He replaces George Preston, Langley, whose term expired as a commissioner after six years.

H. J. "Hugh" Mawby, Richmond, was elected vice-chairman of the Commission at the same meeting.

Chairman Jones was appointed a member of the Commission in July 1991 by the nine municipalities associated with Fraser Port. He was elected vice-chairman in May 1992.

Urban Pressure Affecting Future of North Fraser

Increased population and the demand for waterfront land along the North Arm of the Fraser River is the greatest challenge facing existing industry today, speakers told a workshop sponsored by the North Fraser Harbour Commission.

"Threats to industrial land are coming from all directions," said Dr. Peter North of the UBC Department of Geography. "Public attitudes to industry and the uncertain future of the forest industry make industry along the river particularly vulnerable."

Dr. North cited population growth, the movement of heavy industry and manufacturing to the suburbs, the spread of housing, the limited land base in the Lower Mainland and the cost of land as significant trends affecting land use today. He suggested the need for a proactive response to these trends if the future of industry along the North Fraser is to be secure.

Peter Neild, Executive Vice-President, Carroll Hatch International, looked at the value of the forest sector in the North Fraser River. "The forest sector contributes over \$1 billion to the local economy, including direct and indirect employment," he said. "Ongoing use of the North Fraser as a river highway needs to be maintained. Currently 13.3 million metric tonnes of forest products move through the river annually. It would take 2,200 trucks per working day to move this cargo — that line of trucks bumper-to-bumper would stretch 41 km. — the distance from the Port Mann Bridge to Abbotsford.

"In general, we regulate land and water use and ensure that national, regional and local economic objectives

are met", said George Colquhoun, General Manager and CEO of the Harbour Commission. "We safeguard equal access to people and goods to the river while managing the facilitating, planning and development.

According to Neild, "The question we need to ask is: Are these jobs worth having? You tell me. According to Statistics Canada the average job in Canada and B.C. pays \$29,000 per year, the average industry job pays \$41,000 per year. There are between 25,000 and 35,000 jobs directly related to the forest industry in the North Arm of the Fraser River."

Neild echoed Dr. North's statement: "If we want something to happen we will have to be proactive. We need to decide what we want to do and then take action. That means we will need to encourage aggressive zoning that protects mixed use of the river shoreline."

Following the presentations by experts, the seventy-five (75) lessees and clients of the Harbour Commission in attendance were asked for their servicing needs and their views in the future development of the North Arm.

Peru to Privatize State-owned Port of Ilo

The Government of Peru is seeking to privatize the state-owned Port of Ilo through the Comité Especial de Privatización del Puerto de Ilo. The financial advisor is ABN AMRO Bank N.V., Prisma Inversiones y Finanzas S.A.

Ilo is the first port in Peru to be privatized in what is described as "a drive for increased efficiency of the port services and expansion of trade under private management." The national port agency, Empresa Nacional de Puertos (ENAPU), currently acts as manager/operator for all port activities except stevedoring which is performed by shipping agents.

Ilo is located in southern Peru, 525 miles from La Paz Bolivia, 508 miles south of the Port of Callao, Peru, and 85 miles north of the Chilean Port of Arica. Its principal hinterland "in the near future should be the region of La Paz."

The Port's principal exports are fish meal and bagged minerals; leading imports are general cargo and bulk

cereals. Further detail is shown below:

**Port of Ilo: Cargo 1992/93
(Tons)**

	1992	1993
Fishmeal	101,953	129,646
General Cargo	3,387	5,590
Minerals	10,449	18,289
Grain	3,185	11,496
Total	118,974	165,021

Source: ABN AMR Bank N.V. — *Prisma Inversiones y Finanzas*

Current facilities include:

- A jetty-type pier built of reinforced concrete, measuring 302 meters by 27 meters, constructed between 1968 and 1971.
- Four mooring berths, of which two each have a length of 197 meters and draft of 10.9 meters and can receive ships of up to 35,000 dwt. The other two berths are able to receive barges up to 3,000 dwt.
- Warehousing and Storage: A warehouse of 1,550 square meters without columns. Three storage zones: No. 1 (1,200 square meters), No. 2 (4,800 square meters); No. 3 (12,000 square meters). 15,000 square meters of unpaved area; two zones to be developed in the future of 22,750 square meters. All areas are enclosed with brick and mesh fences.

Other buildings and equipment include various offices, a maintenance shed, and a "weigh-bridge."

Privatization is to be achieved through a public tender for the concession designed "to attract the best possible investor/operator."

The concession will be granted for a period of 30 years with a possible 10-year extension and "most likely be based" on a revenue sharing arrangement. The concession holder will have the right to:

- Equip and use the terminal with its berth and storage areas as considered adequate
- Invest in and own the superstructure
- Establish the levels of rates charged for cargo and ship services

(AAPA Advisory)

National Port Authority Of Panama in profile

Background:

National Port Authority is the organization of the Panamanian State responsible of maintaining our ports operating efficiently for the benefit of national and international maritime traffic.

According to Law 42 of May 1974, the institution has its own patrimony and is autonomous in its internal regulations, and through the Ministry of Commerce and Industries is subject to the general policy of the Executive.

The objectives of this institution, from the moment it was established, are the development, planning, administration, construction, maintenance, exploitation and operation of our National Port System, as well as to formulate and execute the adequate policies to achieve its aims.

For our institution, the impact of the Panama Canal Treaties meant the need to improve our operative and administrative systems, due to the magnitude of the new operations which came with the reversion of the Ports of Balboa, Cristobal and Coco Solo North.

On October 1, 1979, the Republic of Panama takes control of the Transisthmian Railroad and of all the installations located at the Ports of Balboa, Cristobal and Coco Solo North. It is from this moment on that National Port Authority, as the main body of port activity, assumes new and complex responsibilities that demand the adjustment of its internal structure to cope with the assigned role and guarantee the obtention of the benefits that glimpsed under this new panorama.

With the implementation of the Treaties, the country fully recovered its sovereign rights. Particularly with the case of National Port Authority, that part of the foreign trade of Panama which was handled by the former Panama Canal Company, was recovered and canalized through the Port system. Aside from placing into Panamanian hands the handling of an important part of our foreign trade, this new situation also meant the obtention of fringe benefits for the economy of the country, that before were conceived as an integral part of the resources

produced by the Panama Canal operation.

Due to the fact that the magnitude of the new operations were beyond the demands of the traditional traffic that was handled by this institution, it was necessary to adequate the operative and administrative systems because the nature of the operations acquired a new dimension, which was to change from support operations of the canal traffic to commercial operations.

It is important to point out that the impact of the Treaties also meant the reversion of port infrastructure such as buildings, docks, lands, equipment and other assets. The value of said assets, according to the last appraisal, was US\$971.9 million.

Major Functions of Ports:

Among the ports controlled by National Port Authority (APN), five (Cristobal, Coco Solo North, Bahia Las Minas, Balboa and Vacamonte) are the main ports and the remaining ones are secondary.

Major functions of Panamanian ports, including ports for special purposes controlled by private companies, are described below. Port classifications below are in accordance with the annual statistics report prepared by the National Port Authority for 1992.

Port for Overseas Carriers:

Cristobal, Coco Solo North, Bahia Las Minas and Balboa: The details are described in the following paragraph. These four ports handle more than half of the total cargo handled in Panama and consequently, are playing vital roles for the Panamanian maritime activities. Excluding the port of Coco Solo North, the other three handle only overseas cargo. Recently, the domestic cargo volume has increased. Excluding ports for special purposes that handle banana and sugar, these four ports are handling most overseas cargo in Panama. Cristobal and Balboa are identified as "Port Complex" according to the National Port Authority classification.

Pedregal: The port of Pedregal is located at the Province of Chiriqui on the Pacific side. General cargo (sacked sugar, fertilizer, shrimp, etc.) and bulk sugar are mainly handled in this port.

Vacamonte: The port of Vacamonte which was designed to serve the fishing activities in Panama, is located 20 Km

south-west of the Port of Balboa. The facilities provided consist of a T-shaped pier for overseas tuna processing and refrigeration plants behind them, piers for services and a ship lift for repair and maintenance. The major cargoes handled at this port are tuna, shrimp, fish, flour, fertilizer, etc. Most cargo is categorized as overseas trade. All tuna is transshipped.

The actions that are carried out through National Port Authority are framed in the firm belief that the existence of the ports, their continuity and operative efficiency are primary needs of our economy.

With the investment budget approved for 1993, which amounts to B/.14.7 million, the Institution has destined since 1990, the amount for B/.40.9 million to improve the infrastructure of our National Port System.

Future Plans:

The future plans of the Institution are closely related with the modernization program of the Panamanian economy adopted by the National Government, which, with respect to National Port Authority, aims to:

- 1- Achieve greater efficiency at the Ports of Balboa and Cristobal by granting concessions and permissions for cargo handling operations.
- 2- Attract private investment for the development of new port installations.
- 3- Reorganize National Port Authority according to the development of the program.

The Government of Panama has initiated a program of fundamental reform of the Transisthmian Highway (Atlantic/Pacific Corridor) Port of Balboa, Bahia Las Minas, Coco Solo North and Cristobal.

At this moment, general studies are being carried out through international consultants, taking into consideration the following areas:

a. Concessions Development: An analysis of the potentiality of our ports is being carried out for their growth and diversification from a commercial exploitation point of view.

b. Tariff Analysis and Financial Evaluation: The study will determine the need whether to modify or not the tariffs and the evaluation of the impact



The Port of Cristobal, NPA

that these modifications will have on the finances of the institution.

Likewise, the effects of commercialization will be measured, trying to optimize NPA decisions on this respect.

c. Development of New Port Sites: Studies are being carried out to identify new port sites for the development of container ports and industrial areas.

Telfer's Island, at the Atlantic entrance of the Panama Canal, is at this moment, the best site for this purpose. The development plan will be established, and the same will serve as a guide for the future concessionaires of that port area.

Aside from the container ports, the agricultural-industrial sector has requested to adapt existent ports that are located west of Panama City, or to build new facilities that will allow cost reduction both for the imports needed in these areas, as well as to reduce the exportation cost. This is particularly important due to the competitive conditions that have surged out of the exchange opening of the Latin American countries.

d. Environmental Protection: This study will start soon and consists of the establishment of secured operation methods for the different concessions and according to the particular characteristics of each one.

Additionally the potential environmental risk of each type of concessions will be studied, and each concessionary must sign insurance policies with enough coverage to guarantee the po-

tential ecological harm that may be caused.

e. Organization Development: The consultanship carries out a study to propose more dynamic structures that will be in accordance with the reality of the institution and its future development.

f. Regulatory Legal Frame: Even though NPA has a law that allows the interaction with the private sector and a concessions regime, some aspects must be reviewed in order to allow more dynamism in the entity.

g. Port Infrastructure: A specialist engineer is analyzing the potentiality of using our infrastructure as modern terminals. This is done in order to avoid proposing the use of an area for which there is no capacity in the infrastructure.

Within this reforms frame to the ports sector, Panama presents attractive options to national and foreign investors in the area of ports development and tourist and related commercial-industrial activities. The progressive recovery of the areas next to the Panama Canal and to the influence zone of the Transisthmian ports make the maritime-port development strategy a must, which consolidates the role of Panama as a services platform and optimizes the benefits of its privileged geographical position.

These lands are the basis and support of the activities that are carried out at our main ports, for which reason National Port Authority has requested to the National Government to assign,

on a priority basis, the use of these land for port activities.

Said lands can be the site of important storage areas, Maquila Industrial activities, packing, multi-sector export zones, warehouses, hangars, deposits, enterprises, etc., which will be located on a privileged position near the ports.

The Port Development Master Plan that is being carried out will identify, in detail, the potential that Panama has as an international cargo transshipment center and will establish the bases on which the private sector, both local and foreign, can participate in the development of the port activities in Panama, thus contributing to the improvement of the international maritime trade.

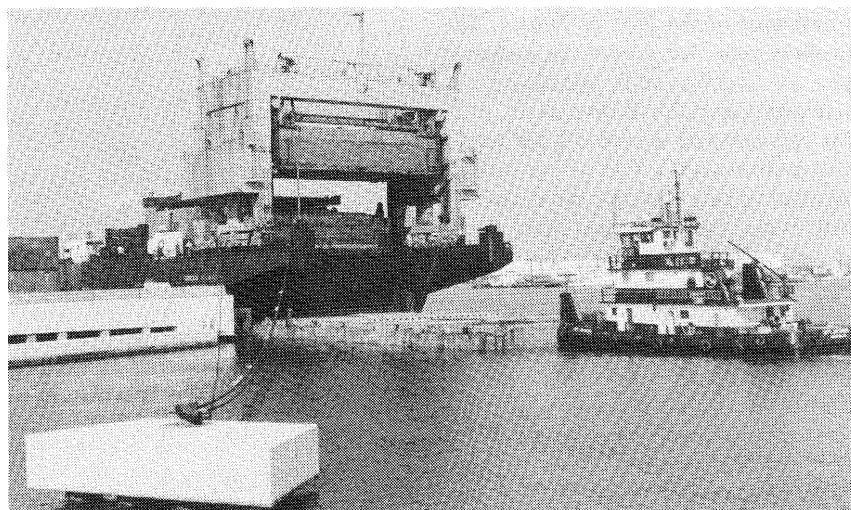
Port of Corpus Christi: Another Tonnage Record

Port of Corpus Christi tonnage has again hit an all-time record, with more than 76.5 million tons of cargo moving through the port in 1993. This represents a 6 percent increase over the 72.5 million tons shipped in 1992. Port tonnage has topped 70 million for the past four years, and has reached record breaking levels in 10 of the past 11 years.

As usual, petroleum was the highest volume commodity. For the second year in a row, petroleum tonnage topped 60 million tons. In 1993, at almost 66 million tons, it registered an increase of 4 percent over 1992 levels. Petroleum accounted for more than 86 percent of the port's tonnage in 1993.

The largest increase continues to be in containerized cargo. In its first full year of operation, Cargo Dock 8, the port's general purpose cargo dock, handled 76,722 short tons of containerized cargo, or 5,123 containers. This represents an increase of 293 percent over 1992. General cargo, which includes breakbulk and containerized shipments, showed a 2 percent increase over the previous year.

Dry bulk shipments registered almost 6.6 million tons, an increase of 5 percent, and accounted for over 8 percent of the total tonnage. Bulk grain, at almost 1.5 million short tons, was also a big gainer, showing a 185 percent increase over 1992. Chemical shipments and export grain both accounted for about 2 percent of the total tonnage,



A tugboat positions a LASH barge for loading onto the M/V Green Island at the Port of Corpus Christi recently. The barges, loaded with bagged wheat and sorghum, were destined for Africa and Asia. LASH (lighter aboard ship) barges are small barges that can be loaded aboard a specially designed vessel such as the Green Island for ocean transport. This shipment was the first of several planned for Corpus Christi.

and liquid bulk shipments, at 96,750 short tons, rounded out the total.

The final stage of the \$20 million Dock 8 project came in 1993 with the completion of a new 65,000 square foot warehouse immediately west of the dock. It will be used primarily for storing bagged agricultural products, which make up the majority of the port's current breakbulk business.

In keeping with the goal of providing its users with an integrated, versatile general cargo complex to complement Cargo Dock 8 and better serve water, land and rail customers, the Port of Corpus Christi in 1993 began planning a series of related development projects for the south and north sides of the port's main Inner Harbour.

The southside improvements, set to begin this spring, will give the port an additional 23 acres of cargo storage and marshalling area immediately adjacent to Dock 8. According to port officials, the improvements will result in smoother cargo flow from the dock to the storage and marshalling areas and provide much needed space for handling containers and project cargo.

To effect these improvements, the port demolished the remaining three of four original cargo warehouses constructed when the port first opened in 1926. They also purchased 15 acres of land from Southern Pacific for use as a future transload terminal and another 6.35 acre tract adjacent to Dock 8, which will be used for project cargo

storage.

Expansion is also planned for the north side. Plans call for enlarging the existing 62,000 square foot warehouse at Cargo Dock 9 by 75 percent and extending the dock apron width by 21 feet. This will allow for more efficient cargo handling in that area of the port and for that dock to be used as a back-up to Dock 8.

Good news came in late 1993 with the passage of the North American Free Trade Agreement. NAFTA, which had the support of many port and area leaders, is expected to open new business opportunities, especially between South Texas and Mexico. In anticipation of its passage, the port hosted a number of Mexican government officials, including the governors of the states of Nuevo Leon and Tamaulipas, and the mayor of Monterrey.

Cargo Dock 8 saw its most extensive movement in early September when 86 units of heavy earth moving equipment rolled across the dock. The shipment marked the first roll-on/roll-off (ro/ro) movement over the dock and the first time a true ro/ro vessel, the M/V *Falstaff*, called at the port. The equipment was destined for the construction site of the world's largest hydroelectric plant on the Yangtze River in central China. A second shipment moved in October and several others are planned for the future. This is believed to be the largest-ever, off-highway earth moving

equipment sale by a private firm, Corpus Christi-Based Transworld Industries Ltd.

Containers Exempted From State's Use Tax

Georgia Governor Zell Miller has signed into law an exemption from the state's use tax for cargo containers used in international commerce when they move in and through the State of Georgia. The need for the use tax exemption came to light following a 1993 U.S. Supreme Court ruling allowing the State of Tennessee to tax international commerce.

"This exemption vividly demonstrates Georgia's commitment to international trade and to our state ports," said Gov. Miller, who signed the legislation just 13 days after its introduction. "Let there be no mistake, Georgia is open for business."

"The billions of dollars of cargo shipped through the ports create more than 63,000 jobs throughout the state, generating nearly \$200 million in state and local taxes, with a net economic impact of \$7 billion a year," he said. "We must do everything within our power to preserve and enhance that investment."

George Nichols, Executive Director of the Georgia Ports Authority, said the action "signals Georgia's intent to foster international trade by seizing new market opportunities. All indications point to a virtual explosion in trade. The state's leadership recognizes this and has sent out a strong, unequivocal and timely message."

Cargo Volumes Up At New York-New Jersey

Oceanborne general cargo volumes through the New York-New Jersey Port last year recorded a 1.3 percent increase over 1992 levels, according to a summary of the Port's 1993 oceanborne foreign trade released by Lillian Liburdi, Director of the Port Department of the Port Authority of New York and New Jersey.

The port's volumes increased significantly in the second half of the year, overcoming a somewhat sluggish performance during the first half.

Total volume of oceanborne general

cargo rose from 12.7 million long tons in 1992 to 12.9 million in 1993. Although imports showed a 5.1 percent increase, from 8.4 million long tons to 8.8 million in 1993, exports were affected by the economic downturn experienced by the port's largest trading partners, and declined by 5.9 percent, from 4.4 million to 4.1 million long tons.

Much of the outbound cargo loss was attributed to declines in exports to three of the bistate port's top trading partners, the United Kingdom, Taiwan and the Netherlands.

Port's North Atlantic Market Share Up

The port increased its North Atlantic market share of general cargo from 39.7 percent to 40.2 percent. Its share of the U.S. general cargo market remained steady at 7.6 percent.

Values for general cargo increased by 3.1 percent from \$50.9 billion to \$52.5 billion. The value of imports rose 6.6 percent while export values declined 3.4 percent.

Although Germany remained the port's leading import partner in 1993, the People's Republic of China replaced Italy for the number two spot. Third place Italy was followed by Japan and France. The port's two leading export partners remain the Republic of Korea and the United Kingdom, followed by Germany, and Taiwan, which rose to fourth place between 1992 and 1993, with the Netherlands in fifth place.

Among the export commodities that increased in 1993 over 1992 were lumber, paper and paperboard, newsprint, alcoholic beverages, printed matter, steel plates and sheets, fresh and frozen meat and office machinery (including computers). Imports saw volume increases in paper and paperboard, steel plates and sheets and clothing.

"This year's figures parallel the global pockets of recession and recovery," said Ms. Liburdi. "The weak economies of northern Europe were reflected in declining exports at the beginning of the year, while an increase in imports indicated a pick-up in the U.S. economy by the middle of the year," she said.

"The continued delay in obtaining a permit for maintenance dredging of our Port Newark/Elizabeth berths also served as a factor earlier in the year due to liner diversions of cargos to other

ports," she noted. "Concurrent with the commencement of the dredging project in June, rising cargo tonnage began to reflect renewed shipper/liner confidence in our port."

Trade with Europe represented 42.4 percent of the port's total general cargo tonnage in 1993, leading all regions with 5.5 million long tons in imports and exports. This was an increase of 3.2 percent over 1992 levels.

Southeast Asia Continues Growth

Asia remained the second most important trading region for the port, comprising 32.6 percent of the port's overall general-cargo tonnage volume. Overall trade with Asia increased 3.8 percent in 1993. This included a 10.4 percent increase in trade with the rapidly growing Southeast Asia region.

"Our Southeast Asia trade saw improvements this year with NOL/NYK (a consortium between Neptune Orient Lines and Nippon Yusen Kaisha of Japan) increasing its all-water service via the Suez Canal to our port from 10-day to weekly calls," said Ms. Liburdi. "Also, COSCO, the national shipping line of the People's Republic of China, announced in late 1993 the introduction of all-water Suez service linking Singapore and Hong Kong with the Port of New York and New Jersey."

Selected 1993 Statistical Highlights

- 1993 TEUs totaled 1,972,692, down 2.1 percent from 2,014,052 in 1992. This represented a 2 percent loss in containers down to 1,180,861 in 1993 from 1,205,338 in 1992.

- Bulk cargos in 1993 rose 9.9 percent over 1992 volumes to 27.8 million long tons. The year saw healthy increases in bulk exports, up 10.4 percent to 2.5 million long tons and imports, up 9.9 percent to 25.3 million long tons. Iron and steel scrap led the increases in export commodities, and petroleum, jet fuel and sugar led the rising imports.

- Total share of the U.S. auto trade import market increased to 15 percent from 13.5 percent, according to PIERS data, despite continuing nationwide declines in auto imports. The total number of vehicles moving through Port Authority marine terminals rose to 386,490, up 3.7 percent from 372,738 in 1992. Imports rose to 330,281 from

314,048 while exports were 56,209, a slight decrease from 58,690 in 1992.

- Midwest trade loaded TEU volumes through the Port of New York and New Jersey have more than doubled over the past six years with 1993 volumes totaling 173,268 up from 74,616 in 1988.

- The port has also increased its share of East Coast traffic moving to and from the Midwest. In 1993, the port's share of this market reached 27 percent, up from 16 percent just six years ago. A number of port initiatives contributed to the growth, among them the establishment of ExpressRail, an on-dock rail facility, combined with new double-stack rail service; lower line haul rates to the Midwest and Canada; and efforts by local labor to lower costs and improve service.

- The Passenger Ship Terminal continued to draw increased traffic, up to 437,203 passengers on 219 voyages from 310,915 on 172 voyages in 1992.

Oakland Dredging EIR For Deepening Harbor

Culminating a process initiated 24 years ago, the Army Corps of Engineers distributed the environmental impact statement and report for deepening the Oakland harbor, the fourth busiest U.S. gateway for container cargo.

The report recommends maximum use of the dredged material for restoration of a 300-acre North Bay tidal marsh known as Sonoma Baylands, a habitat for three endangered species. Save San Francisco Bay Association, the Sierra Club and other groups endorsed legislation authorizing and funding the Sonoma Baylands project last year. The report also calls for disposal of dredged material at a Federally-certified ocean disposal site 50 miles west of the Golden Gate, and port-owned land now housing the Galbraith Golf Course in Oakland.

Port officials say the \$100 million project is urgently needed to restore the port's competitiveness, create up to 2,400 jobs and generate economic impacts of more than half a billion dollars.

Some \$6 million in high-tech environmental tests of Bay sediment was performed to prepare the 988-page document, a process that also involved the Federal Environmental Protection

Agency and the State Regional Water Quality Control Board. The study will be reviewed by 18 Federal, State and regional agencies, as well as the general public, in the next two months. If adopted, the report will allow the long-awaited dredging to begin in December. It will take about two years to excavate channels deep and wide enough to handle the giant container-ships that now dominate ocean trade. The project was authorized and funded by Congress in 1986. Under a Federal cost-sharing formula, the Port of Oakland will pay 35 percent.

The study took nearly three years to evaluate 23 alternative land, Bay and ocean disposal sites for the dredged material, and focused on a short list of eight. Since none of the eight can handle the entire 5.6 million cubic yards of sand and clay to be dredged, the sites were grouped together to provide five alternative disposal plans. These range from almost complete ocean disposal, to disposal partly in the ocean and partly in the Bay, to disposal entirely on land.

The report recommends the "B2" alternative, combining marsh restoration, the ocean and golf course. It says the plan will have 10 "significant" environmental impacts, ranging from dust raised by trucking the material to temporary loss of the Oakland golf course. Nine of the impacts can be reduced to "insignificant" levels, the report states, by mitigation or management measures. The remaining impact, on air quality, can be reduced by using special fuel for diesel-powered equipment, though "not to insignificance".

"This is the most thoroughly analyzed channel deepening in the nation's history, indeed, possibly in the world," said Oakland Port Commission President James B. Lockhart.

"The result of that analysis is the draft environmental impact statement and report jointly issued by the Corps of Engineers and the Port of Oakland," Lockhart said. "In this document, we exhaustively and rigorously address all water quality, air quality, wetlands, solid waste, land use and endangered species concerns stemming from the project. The project must go forward, and with it, the Bay area's ability to accommodate transportation by ship — the most environmentally desirable means of transportation in the world."

Seattle: Pacific Trade Key to Stability, Growth

Container volumes at the Pacific Northwest's leading gateway remained stable last year at 1.15 million TEUs. Steamship lines using Port of Seattle facilities recorded a five-tenths of one percent increase in volumes from 1,053,799 TEUs in 1992 to 1,059,212 TEUs in 1993.

"Carriers serving international business on transpacific routes were the source of stability harborwide and for slight growth at Port facilities," said Mic Dinsmore, executive director of the Port. "This was demonstrated in the Port's record volumes for the months of August and September, and our all-time high in the month of October. Conversely, domestic containerized cargo to Alaska and Hawaii was down as a result of barge services converting to the sole use of rail cars versus intermeddle containers."

Hanjin Shipping, Ltd., was the 1993 volume leader through the Port of Seattle with more than 150,000 TEUs handled through its Terminal 46 operations. The Port's second largest carrier, American President Lines, also moved more than 150,000 TEUs. Hyundai Merchant Marine, the Port's fastest growing carrier in 1993 with a 32% increase in volumes was the only other carrier to move more than 100,000 TEUs across Seattle docks. Other lines in the Seattle top 10 include: Matson Navigation, Westwood Shipping Lines, China Ocean Shipping Company (COSCO), Orient Ocean Container Line (OOCL), Nippon Yusen Kaisha Line (NYK), Mitsui O.S.K. Line, and Neptune Orient Line (NOL). Seattle's top 10 carriers moved 87% of the more than 1 million TEUs which passed through this gateway last year.

"In the latter part of 1993 we started to see an increase in Pacific Asia trade which largely accounts for the record months," said Bob Koplowitz, director of marine marketing and business development. "By year end the Port of Seattle experienced an overall eight percent increase in full container volumes on Pacific Asia trade routes. Ports along the west coast averaged a four percent increase in Pacific Asia trade." Specifically, the Port's analysis of container volumes indicates that Seattle captured a 12 percent increase in full

import containers from Pacific Asia while ports on the west coast (including Seattle) averaged only six percent growth. Comparatively, Seattle reported a three percent gain in full export containers to Pacific Asia with all west coast ports averaging a two percent increase.

"Our trade outlook for 1994 is positive as Pacific Asia economies stabilize, trade barriers gradually fall and new markets open," said Don Lorentz, director of trade and economic development for the Port. "Japan remains, and likely will continue to be, the largest trading partner for Seattle because of our proximity and long history of relationships. Yet, there also are large consumer populations in such countries as Korea and China which purchase more U.S. products every year and are producing quality goods that are attractive to U.S. consumers. As a major gateway for trade between North America and other Pacific Rim countries, Seattle and its surrounding communities will gain from this commerce. Additionally, the reduction of trade barriers will clearly benefit this state as markets for such Washington products and services as apples, transportation equipment and software open across Asia and the Pacific region."

"Based on the revitalization of Pacific rim economies and our positive trade outlook, the Port is projecting a three to five percent increase in container volumes for 1994," concluded Dinsmore. "We believe the start up of new services this spring by COSCO and Hyundai are key indicators that we're gaining positive momentum. We're looking forward to working with all of our carriers as they increase their business through this gateway. The Port provides the facilities and infrastructure for them to make commerce happen every day — now we also must help them build trade volumes."

The Port of Seattle is an economic catalyst to the entire Puget Sound region. It develops and manages commerce through the Seattle harbor, Seattle-Tacoma International Airport, warehousing and distribution centers, Shilshole Bay Marina, and Fishermen's Terminal. The Port impacts more than 80,000 jobs in the region and handles greater than \$30 billion a year in two-way trade.

Sea-Land, Charleston Sign New Contract

The Port of Charleston and Sea-Land Service, Inc., the largest U.S.-flag steamship line, have signed a contract taking them into the 21st Century.

Sea-Land, the first container line to call at the Port of Charleston, has based its operations at Columbus Street Terminal since 1966. Sea-Land's move to the Port's Wando Terminal later this year will give the ocean carrier more than 65 acres in its new dedicated area. The Wando Terminal has six container cranes on-line and three more being added this year.

"This is important to both parties," according to L. Duane Grantham, director of marketing and sales for the Port of Charleston. "We have jointly finalized an agreement beneficial to Charleston, Sea-Land and our customers."

The all-container Wando Terminal has been touted by other major ocean carriers using the facility as one of the most efficient in international shipping. Sea-Land's operation in Charleston is already the most productive at any of its terminals in the U.S., Grantham said.

Sea-Land will continue to call Charleston with three ships a week under the new contract. The agreement extends to January 2000 with three consecutive five-year options. Sea-Land's shipments account for approximately 20 percent of the Port's current container volume.

Today, Columbus Street Terminal has three container cranes serving Sea-Land vessels, including some of the largest container ships in the world.

"Sea-Land is a major carrier at Charleston and the new contract is very significant for the Port," Grantham noted.

"Now Charleston also has the opportunity to find new carriers at Columbus Street Terminal," he said. "This is an exciting prospect. It's a combination terminal with extensive container and breakbulk cargo handling capability." (Port News)

Tacoma: Computer to Simulate Cargo Flow

The same computer technology that has allowed manufacturers to develop

more efficient production lines will soon help the Port of Tacoma design its future railroad connections.

The Port will use a computer model to simulate future cargo flow and test rail connections between its on-dock intermodal rail yards and the trans-continental lines operated by Burlington Northern and Union Pacific. The model will help the Port and the City of Tacoma's Beltline Railroad spot potential bottlenecks and design cost-effective improvements as cargo volumes grow.

The \$118,000 project, due for completion this June, will be done by Vickerman, Zachary & Miller (VZM), an intermodal and maritime planning/design firm based in Oakland, Calif. VZM has completed similar studies of more than 20 intermodal operations throughout the United States. The company was one of six considered for the Port study.

The new computer model will simulate train movements, container volumes, handling equipment and truck traffic. Animation will provide a visual display of the overall transportation system in action.

"It's a great tool for looking at various scenarios to see what will work best as cargo volumes grow," said Paul Chilcote, the Port's senior director of planning, research and budget. He said the model will be used both to plan future rail systems and to look for improvements in the existing rail network.

"The bottom line will be to improve the service that we can provide for our customers that rely on a seamless intermodal system," said John Terpstra, Port of Tacoma executive director.

Rail traffic at the Port's two intermodal rail yards has increased steadily in recent years. In 1993, the two rail yards handled 40,843 rail cars, a 29 percent increase compared to the 31,684 cars handled five years earlier.

The Port's plans for two new 50-acre West Blair Terminals and an accompanying intermodal rail yard will mean continued growth in rail traffic moving through the Port. The Port has been working for years to open the expansive Upper Blair Waterway to intermodal container shipping, an activity which so far has been concentrated at the mouth of the Blair Waterway and in Sicum Waterway.

Now the Port wants to make sure that its rail infrastructure will improve efficiency throughout the expansion effort.

"Our goal is to analyze the complete rail network so we can deliver the most efficiency and make the best use of our capital investment," said Bob Earley, president of the Port of Tacoma Commission. "This model will help us evaluate the existing infrastructure and plan for needed improvements."

"Our Port has built its reputation on the swift transfer of cargo between ship and rail," said Port of Tacoma Commissioner Jack Fabulich. "But we are always looking for ways to improve our existing system, and we need to build in added capacity for future on-dock services."

The Port of Tacoma has always relied heavily on strong rail connections in its intermodal operations. In the 1980s, the Port became a pioneer in on-dock intermodal operations. Today about 75 percent of Tacoma's containerized international import cargo relies on rail transport.

The Port will fund most of the study, with the Beltline Railroad agreeing to contribute to the overall effort. The Beltline shuttles rail cars between Port intermodal rail yards and the mainline transcontinental lines.

Chilcote said the study will involve much more than just a look at Port facilities and requirements. The model will factor in businesses and industries that operate in the Port area.

"This is more than just a Port study," he said. "We want to be able to see how our operations will mesh with other possible developments."

For example, impacts from the development of the proposed commuter rail line connecting Tacoma and Seattle will be built into the model. New railroad holding yards, interchange yards and additional track could be added to see how they would affect the overall transportation network.

"We want to create a picture of what our rail system needs to look like as our 2010 Plan becomes reality," said Earley.

building U.S. exports. Waterborne export trade among Puget Sound ports was valued at about \$9.7 billion in 1992. Export tonnage at the Port has grown from about 2.2 million tons in 1975 to about 8.2 million tons today.

U.S. Congressmen Mike Kreidler, Tacoma City Councilman Bob Evans and Federal Way Mayor Mary Gates joined Senator Murray in acknowledging the Port's export success. Port of Tacoma Commissioners Jack Fabulich and Mike Fletcher accepted the award and credited the Port staff, Tacoma's longshore workers and Port customers for the accomplishment.

"We certainly want to thank our work force and our customers," said Fabulich. "They are the ones who make this all possible."

The gathering featured a display of export cargo including John Deere tractors, Mitsubishi automobiles, Brown & Haley candy, Simpson Tacoma Kraft paper products and other export goods.

Africa/Europe

Port of Tacoma Receives Top US Export Award

U.S. Senator Patty Murray presented the Port of Tacoma with the President's "E Star" award for excellence in exporting on Thursday, February 18.

Speaking at a ceremony at the Port's Terminal 7 warehouse, Senator Murray said the award sends another signal of the importance of international trade for the regional and national economy.

The award came just one day after the Boeing Company announced it had won a portion of a large aircraft order from Saudi Arabia.

Tacoma is the first port in the Pacific Northwest to receive the "E Star" award. Only six ports in the United States have received the Department of Commerce's top honor since it was started in 1969.

The award is the highest commendation for long-term performance in

Foreign Goods Traffic Increases in Helsinki

Despite the recession, the Port of Helsinki's foreign goods traffic increased by 7.8% on the previous financial year to 7.6 million tonnes, while total goods traffic rose by 5.0% to just under 8.2 million tonnes. A record high of nearly 6.4 million passengers was reached in passenger traffic. Port calls by ships rose by 3.0% on the previous year. This favourable development in marine traffic was reflected in the revenue received. The total revenue received by the Port of Helsinki Authority was FIM 298.9 million, representing a 5.3% increase of FIM 14.9 million against the previous year.

The Port of Helsinki Authority's cash-linked operating costs totalled FIM 135.6 million and showed an increase of FIM 2.5 million (1.9%) against 1992. Total expenditure was FIM 260.5 million, which was FIM 14.0 million, or 5.7%, more than 1992.

The result for the financial year 1993 was a surplus of FIM 38.3 million (FIM 37.4 million). The operating margin



U.S. Senator Patty Murray presents Port of Tacoma Commissioner Jack Fabulich with the President's "E Star" award for excellence in exporting.

was FIM 163.5 million, or in percentage terms 55.6%. The surplus represents 12.8% of turnover, while yield on restricted equity was 21.5%. Helsinki City Board directed the administrative bodies to increase their productivity by ten per cent between 1991 and the end of 1994. According to the productivity index, the productivity of the Port of Helsinki Authority had already improved by 24% as at the end of 1993.

Investments by the Port of Helsinki Authority totalled FIM 30.8 million in 1993. The most significant target for investment was the construction of a new ferry berth at North Harbour.

Mr. Graillot Appointed New Le Havre Head

Mr. André Graillot, Chief Civil Engineer was appointed to the post of Executive Director of the Port of Le Havre Authority by the French Cabinet on February 9, last, on the proposal of the Equipment, Transport and Tourism Minister, after favourable opinion delivered by the Board of Directors of PAH during its meeting of January 27th.

On February 15, 1994, Mr. André Graillot took up his new post as the Executive Director of the Port of Le Havre Authority.

Celica Presented at Bremen Congress Centre

Bremerhaven, Germany's pivotal point for automobiles, was in full motion recently in a very special manner. Toyota Germany had invited roughly 1,300 dealers and guests from all federal German states for the presentation of the new 'Celica' model at the Bremen Congress Centre. The day after there was a meeting at Europe's largest automobile terminal in Bremerhaven. The dealers then started out from there in all directions in 650 brand-new silver Celicas as part of an advertising campaign on their way home.

Prior to the actual 'Drive Away' the hosts, Toyota head Toshia Miyaji, and Dr. Dieter Naumann from BLG, Bremer Lagerhaus-Gesellschaft, underlined the central role of Bremerhaven for the import of Toyota vehicles to Europe. Dr. Dieter Naumann, BLG

chairman and head of BLG Automobile Division, emphasised that Toyota was responsible for establishing the increasing importance of the port for import vehicles as well. It all began in 1976 with initially approx. 7,000 Toyota vehicles for the German market. Later other European countries were added to the list. Up to now more than 1.25 million vehicles of this make have been



Welcoming the new Toyota Celica at Europe's largest automobile terminal in Bremerhaven.

Hamburg's Tiedemann Speaks in Osaka

Speech delivered on March 11, 1994 by Bernd Tiedemann, Director-General, Freie und Hansestadt, Hamburg.



Mr. Tiedemann

Ladies and Gentlemen:

I am delighted to extend a very warm welcome to you all today. The twinning agreement signed by our two cities at an official ceremony at Hamburg City Hall on May 11, 1989 — in the middle of Hamburg's celebrations of the 800th Anniversary of its Port — can now look back on nearly five years of fruitful cooperation, linking two cities that are not only world ports, but also important, modern centres of trade and industry.

Osaka and Hamburg are both the

imported to Europe via Bremerhaven. The target for 1994 is 95,000 units.

Despite the slack period for automobile business worldwide, BLG was again able to impressively confirm Bremerhaven's position as Europe's leading automobile transshipment point. The good results of the previous year were again achieved with a figure of 760,000 units handled.

second-largest cities in our respective countries and have similar economic structures with shipbuilding and mechanical engineering, chemicals, food, paper, the electrical industry and electronics of particular significance.

Hamburg is the main distribution centre for Japanese goods throughout Europe. In the Greater Hamburg region there are more than 150 branches of Japanese corporations, 130 of these in the centre of Hamburg alone, with a total of over 6,000 people employed there.

What's more, lean production — or rather lean management — is no problem in Hamburg. Our economy has a closely-woven network of highly-qualified business services — with everything from transport to advertising and data processing to media — on which companies wanting to serve the German and European markets can fall back on.

As Europe's leading container port in trade with Asia, Hamburg is



Germany's most important import centre. And as Asia's leading industrial nation, Japan is naturally the No.1 among the East Asian supplier countries in terms of imports through Hamburg.

In 1992 goods worth more than DM 11 bn were imported through Hamburg — in other words more than a third of all Far Eastern imports came from Japan. Another fact that shouldn't be forgotten is that Hamburg's significance as a centre of imports and exports is not confined to the German market but includes Northern, Central and Eastern Europe as well. After all, since Europe's frontiers were redefined, Hamburg has enjoyed an ideal location in Continental Europe with enormous growth potential — at the cross-roads of trade with Scandinavia, Finland and the Baltic states, Central and Eastern Europe.

In this new constellation the Port of Hamburg is the most important Atlantic port for Northern, Central and Eastern Europe. What's more, Hamburg is expanding its intermediary position for the markets of East Asia, Europe and America in consistent, carefully targeted fashion. We see our Port as a logistics centre that not only offers simple cargo handling but also provides a broad range of supplementary, cargo-related services.

The extension work required for this is already well under way. Besides converting older sections of the Port into modern sites and extending berths for deep-drawing vessels, the specialist terminals for handling fruit, paper and cellulose, and automobiles are constantly being modernized and extended. Two major projects — the Altenwerder Port Extension Plan and the deepening

of the Elbe channel — are key aspects of Hamburg's government policy programme.

The stronger position the Port of Hamburg now finds itself in is bearing fruit despite the current weakness of the world economy — container traffic has grown by 12% in spite of the recession!

The above-average growth rates the Port of Hamburg has achieved on Far Eastern routes prove that the opportunities offered by working with Hamburg in its "Eurogate" function for this region are being recognized and taken.

Hamburg's economy is, like yours, broadly diversified. Trade and transport are two of its key pillars. In the Port, Hamburg City-State government and its private-sector firms are planning for growth in world maritime trade and the constantly advancing demands of logistics and technology. Thanks to extensive investment in new terminals, modern office and warehousing facilities, and road and rail links to our European hinterland, our customers can have every confidence that our Port's well-known reliability will be maintained in future.

Moreover, we are also doing our best to offer attractive location-specific conditions outside the Port through a wide range of high-performance service enterprises.

From my office I can see Hamburg's German-Japanese Centre rising ever higher at the heart of the city — as another bridgehead for companies from Japan. Here, a total of 18,000 square metres of office and shop space are being built for East Asian companies wanting to use Hamburg as their "Eurogate" for the European market.

Vivid proof that we want to remain, in future, an interesting European location for Asian companies involved in trade, distribution, other services or manufacturing industry.

Some 3,000 Japanese live in and around Hamburg. Since 1981 Hamburg has had a Japanese School with 250 pupils. Our International School, which is much older, has some 600 pupils of which 20% are Japanese. The professorial chair for Japanese studies at Hamburg University is the oldest in any German-speaking country. It was established in 1914 by a German academic who had spent the previous 30 years working as a professor at Tokyo University. For some years now, our Japanese Seminar has been cultivating particularly close links to the Municipal University of Osaka within the framework of our twin city partnership.

In 1900 the German Asia-Pacific Businesses Association was founded in Hamburg — as an association representing many industries with the aim of encouraging economic ties between the countries of the Asia-Pacific Region and Germany. Japan plays a key role among the 24 countries with which friendly relations exist. The social highlight of the Association's year is the Communal Banquet that takes place every year on the first Friday in March. A festive occasion with a long tradition, this year's Banquet was once again attended by many representatives from the worlds of politics and business in the Asia-Pacific Region.

We all know that for any service enterprise — and the Port of Hamburg is no exception — it is vital to have a committed presence in one's foreign markets. In this sense I am delighted that you have given us the chance of a wide-ranging exchange of opinions and experience here today. Thank you.

1993 A Good Year for Amsterdam Port Region

Despite generally unfavourable economic developments, the Amsterdam port region — which includes the ports of IJmuiden, Beverwijk, Zaanstad and Amsterdam — has succeeded in closing 1993 with satisfactory results. Port Management of Amsterdam figures report total transshipment of goods

reached 48.8 million tons (-0.7%).

The turnover the containers and general cargo (including bagged goods and unit-cargo), in particular, showed an upward trend. Container transport grew by 18% to more than 1 million tons. Other general cargo increased by 22.7% to 5.8 million tons.

In comparison to 1992 the turnover of both liquid and dry bulk decreased slightly. More than 10.2 million tons (-4.8%) of liquid bulk goods were transhipped. Dry bulk goods reached a level of 31 million tons (-2.8%).

In 1993, 8,737 vessels visited the Amsterdam port region.

Cruises continue to be an enormous growth market. 108 ocean-going cruise ships visited the port of Amsterdam in 1993, as compared to 68 in 1992.

Expectations

Godfried C.G. van den Heuvel, Executive Director of the Port Management of Amsterdam, considers the results achieved satisfactory, especially given the difficulty of the year. He anticipates a slight increase in transshipments for 1994.

"One favourable development is the new coal-fired power plant that will be starting up this year. This will certainly have a positive effect on the flow of coal through Amsterdam. The prospects for bulk agricultural shipments are also encouraging, as are those in transport of scrap metals. The large demand for scrap in China and America is underpinning an increase in exports," says the GHB Director.

Van den Heuvel: "1994 will also be an important year for further developing the Amsterdam port region. I am hopeful that government will make a statement sometime in the middle of this year regarding the construction of our new Afrikahaven. There is currently a shortage of land in the Amsterdam port region for new companies setting up. Here we are considering not only the interests of the port, but also the job opportunities and the economy of the region as a whole.

"This year will also see completion of the first phase of wharves and warehousing for the multi-modal transport centre, Westpoint. This mixed transport centre is significant for the area as a Western Europe logistics intersection and for the environment. A study on a second, larger and wider sea lock on the coast at IJmuiden will be

completed this year. Such a lock will also play a critical role in the economic growth and employment opportunities of the region."

Traffic Throughput At Cork Impressive

The Port of Cork enjoyed another very successful year in 1993 when total throughput amounted to 6.75 million tonnes. Imports totalled 4.1 million tonnes while exports reached 2.6 million tonnes. Although total traffic reduced by 250,000 tonnes or 3.6% compared with 1992, it will be recalled that the 1992 figures were inflated by over 500,000 tonnes due to a prolonged strike in Dublin Port. However, growth of 750,000 tonnes or 12.5% over 1991 is most satisfactory in the current economic climate. As oil throughput reduced by 150,000 tonnes in 1993 due to a major plant overhaul at Whitegate Oil Refinery, the increase of 900,000 tonnes or 15% in non-oil traffic over 1991 is a clear indication of the current wellbeing of the Port of Cork.

There was a spectacular increase in car ferry traffic with passenger numbers reaching 300,000, an increase of 85,000 passengers or 40% compared with the previous year while accompanied cars showed even greater growth — up by 24,000 units or 45% to 77,000 units. This remarkable achievement resulted from increased capacity provided by the port's three ferry operators i.e. Swansea Cork Ferries, Brittany Ferries and Irish Ferries. In the peak summer months of July and August, for the first time ever, the Port of Cork handled more continental passenger traffic than Rosslare thus confirming Cork as the preferred entry point for European visitors. Important features behind the success were the wide choice of routes — Roscoff, St. Malo, Cherbourg and Le Havre — and the attractiveness of Cork — Roscoff as the shortest and fastest direct ferry crossing between Ireland and mainland Europe. The performance of Swansea Cork Ferries in accounting for approximately 50% of the port's passenger traffic in a fiercely competitive market endorses the company's strategy of emphasising the huge savings in driving time for visitors to Ireland's premier South West tourist region. Both Swansea Cork Ferries and Brittany Ferries are pro-

viding additional capacity this year and, with Cork Harbour Commissioners currently embarking on a £5 million programme to provide state of the art facilities at the Ringaskiddy Ferry Terminal, further passenger growth can be confidently predicted.

Container throughput totalled 53,000 t.e.u.'s and, while showing a reduction over 1992, it represented a huge increase of 46% over the twelve month period ending November 1991, the last such period totally unaffected by the Dublin strike. Clearly a significant volume of traffic, previously routed through Dublin, has been retained by the port in recognition of the quality service and facilities being provided at the Tivoli Container Terminal. An important factor is the variety of shipping services available at the port — five operators viz Bugsier, Seawheel/Rheintainer, BG Freight, B & I Line and Holland Ireland Line providing eight sailings per week to a range of ports i.e. Rotterdam, Antwerp, Le Havre, Zeebrugge, Hamburg, Bremen and Southampton including the shortest direct lift-on lift-off crossing to mainland Europe. The current £2 million dredging operation to deepen the approach channel to Tivoli to 6.5m at C.D. will also ensure continued expansion of container throughput.

In 1993 significant growth was also experienced in imports of animal feedstuffs, steel scrap and molasses and exports of live cattle and steel. With port competitiveness likely to improve, particularly in the dry bulk sector, following the completion of negotiations on the third phase of docks rationalisation, traffic at the Port of Cork seems destined to continue its upward curve for the remainder of the decade.

Associated British Ports Preliminary Results

The overall result in 1993 was a pre-tax profit of £62.1m (1992: loss before tax of £36.6m which included a property provision of £83.6m).

Profit from the ports and transport operations at £55.9m was lower than in 1992 (£60.7m), but the ports business was on an improving trend in the second half of the year. The figures also incorporate a substantially higher charge for severances of £8.1m (1992: £4.0m).

The consequential benefits in reduced costs will improve profit margins in future years.

Port-related property income contributed £20.7m (1992: £20.1m) and property investment a profit of £10.9m (1992: £9.1m). Property development activities moved back into profit with a surplus of £1.3m (1992: loss of £3.8m before provisions).

The sales of investment property yielded a profit of £6.0m (1992: nil).

Interest charge was reduced to £32.7m (1992: £39.1m).

The tax charge at 22.9% reflects the high level of capital expenditure and utilisation of tax losses and allowances arising from the property activity.

Earnings per share, including profit on sale of investment property, were 25.5p (1992: loss per share of 14.3p after property provisions, and earnings per share of 19.0p before provisions).

Dividend

The directors are recommending a final dividend of 5.8p per share (1992: 5.25p per share), making a total of 9.3p per share for 1993 (1992: 8.5p per share).

Scrip Issue

The directors are also recommending a 1 for 1 scrip issue; it is the third such issue since the flotation of the Company on the stock market in 1983. (1986 and 1990: 1 for 1 scrip issue).

Finance and Capital Investment

The balance sheet was strengthened further in 1993, with shareholders' funds rising from £580m at December 1992 to £657m at December 1993. This improvement incorporated retained earnings for the year of £30m and an increase of £41m in the value of investment properties following valuations by Healey & Baker.

Group borrowings at the year-end were £345m (December 1992: £349m). The level of gearing was reduced from 60.2% to 52.5%. The Group's share of other borrowings in joint ventures where the Group's shareholding is 50% or less was reduced from £15m at December 1992 to £11.5m at December 1993. Group borrowing facilities total £491m, including £175m in Eurobonds which are not repayable until 2011 or later.

Cash flow from operations was strong at £105m and a further £26m was re-

ceived from sales of investment properties which enabled the financing of a high level of investment in fixed assets during the year of £66m, including £50m in the ports and transport business and £16m on non-port related property. Interest and dividend payments totalled £53m.

Ports and Transport

Commenting on the ports and transport business, Sir Keith said:

"The strength of our ports business was amply demonstrated in 1993 given that the UK economy was still in recession for most of the year.

"Our larger ports — Hull, Immingham and Southampton — performed particularly well, reflecting the heavy capital investment programme in recent years."

Total tonnage passing through the Company's ports was 106m (1992: 105m). There were increases in volumes of manufactured goods, imported foodstuffs, timber and containerised cargo, partially offset by reductions in some bulk fuels and in grain exports. The number of passengers using ABP ports also increased to over 4.5m.

Operational turnover at £168m was about £6m lower than in 1992, but this reduction includes the effect of some further withdrawal from cargo-handling activities.

Among the highlights of 1993:

- Hull — the completion of the new River Terminal 1 to serve the expanding roll-on/roll-off trades on the North Sea.
- Immingham — the construction of a new deep-water jetty at the oil terminal is well under way and will become operational in mid-1994.
- Southampton — further growth in container and roll-on/roll-off business.
- Southampton Container Terminals (joint venture with P&O Containers Ltd) — achieved substantial improvements in productivity and another record throughput of over 500,000 units handled.

Port-related property income continues to grow, as historic rentals come up for review and new leases are negotiated.

Property Investment

Property investment income is on a strong upward trend, both at sites close to the Company's ports and elsewhere.

Sir Keith said:

"The single most important property investment project is at Cardiff where our Capital Waterside scheme is making excellent progress. In the autumn of 1993, the Welsh Health Common Services Authority took occupation of Crickhowell House, their new 150,000 sq ft offices, and work is also well under way on the 119,000 sq ft offices for NCM Credit Insurance Ltd on an adjacent site."

Outside the ports estates, Grosvenor Square Properties, the Group's property subsidiary, has made substantial progress in achieving new lettings, which will produce significant increases in rental income in future years. Property investments are increasingly being concentrated on sites close to the ports and on a small number of well-located properties elsewhere. Other properties are being sold when opportunities arise at the right price and sales during 1993 included the Union Square Shopping Centre at Torquay, which was sold for £12m.

Property Development

The financial results for 1993 in the property development business benefited from additional lettings and from sales of completed developments. Of the latter the most important was the sale of Greenwood House at Bracknell for £12m. Following the provisions set aside in 1992, no further provisions were needed in 1993.

Board of Directors

Mr Maxwell Creasey, a non-executive director of the Company since 1984, will be retiring at the end of the Annual General Meeting in April 1994.

Paying tribute to Mr Creasey, Sir Keith said:

"Mr Creasey has made a most valuable contribution to the success of the Company. His knowledge and experience in the world of property has enabled us to take advantage of our strengths as an owner of land and property and also to "weather the storm" during the deep recession in the property market."

Prospects

Sir Keith, commenting on prospects, said:

"In the early weeks of 1994, both our ports and property businesses have performed strongly. The new invest-

ments at the ports are producing additional revenue and the property market continues on an upward trend. I believe that prospects are now set fair for us to perform well on a sustained basis in the years ahead."

Southampton: Record Volume of Containers

Associated British Ports' (ABP) Port of Southampton handled record volumes of containers, fruit and cruise passengers in 1993. The port's total tonnage for 1993 was 30,816,000 tonnes, an increase of over one million tonnes on the previous year.

Southampton became the largest fruit-handling port in the UK in 1993. Following the addition of Geest's UK banana imports to the port's existing Canary fruit traffic, 338,000 tonnes of fresh produce was handled at the port's two purpose-built temperature-controlled storage facilities — the Windward Terminal and the Canary Fruit Terminal.

Southampton Container Terminals Ltd (SCT), jointly owned by ABP and P&O Containers Ltd, handled over 500,000 container units for the first time in 1993. The 1993 figure was an increase of more than 10 per cent on the previous year. This reflected the general growth of the Far East traffic and SCT's position as a developing transshipment centre for Europe.

Cruise passenger numbers increased to 215,000 in 1993, a jump of 30 per cent on the 1992 figure. There were 121 vessel calls at the port, confirming Southampton as the UK's premier cruise port. The port is home to P&O's entire UK-based cruise fleet, to Cunard's flagship "Queen Elizabeth 2" and to Fred Olsen's "Black Prince".

Other traffics which performed well at the port were cars — nearly 300,000 handled in 1993, an increase of nine per cent on the previous year and bulks — 1.2 million tonnes handled in 1993.

'River Itchen Study' Winners Announced

Associated British Ports' (ABP) Port of Southampton and the Maritime Division of Southampton Institute of



Winning students discuss their environmental map with The Mayor of Southampton. From Left to right: Ben Stuart, Robert Stevens, The Mayor of Southampton, Robert Atkinson and James Secoy.

Higher Education have announced the winners of the ABP sponsored "River Itchen Study" competition.

Forty undergraduates studying for a BA degree in Leisure Management entered the competition, and spent two months producing an environmental map of the Itchen as part of the Coastal Zone Management unit of the course. One of the aims of the study was to increase students' awareness of the responsibilities of a Harbour Authority.

The winners, Robert Atkinson, James Secoy, Robert Stevens and Ben Stuart, were presented with cash prizes by the Mayor of Southampton, Councillor John Martin, at a reception held at ABP's Ocean Gate office on Wed-

nesday, 16 February. Tim Goodhead, Lecturer at the Institute, received a donation of computer equipment from ABP.

The Mayor of Southampton commented:

"I am delighted to see this link between education and industry established. What I have seen today gives me a very good feeling about the excellent work the Institute and ABP are doing."

The winning entry combined a study of the recreational and economic land-uses with an examination of biological and conservation interests in the area of the Itchen between Woodmill and River View Road.

Dundee Port Increases Profits and Turnover

Dundee Port Authority has increased both profits and turnover, and embarked on the first stage of a five-year plan to invest £10 million on new infrastructure.

Figures revealed in the Authority's Annual Review (released on 21 February) show that turnover last year increased by 3% to just under £5.05 million, while profits rose by an impressive 8% to £825,000.

In addition, some £1.8 million was invested in the construction of new warehouses and the refurbishment of others, on dredging, and on a new

lock-gate and crane.

"It has been a very satisfactory year," said Captain John Watson, DPA chief executive, "and one which I am sure has prepared the ground for further fruitful development of the Port of Dundee well into the next century. Competition for trade during the year remained fierce, and an additional challenge was provided by the recent privatisation of two other major Scottish ports, which altered the environment within which we operate.

"Nonetheless, we have performed well overall. We have launched a substantial investment programme to upgrade our existing infrastructure and facilities, and cargo volumes through-

out the year were encouraging," he added.

While overall import and export tonnages were down slightly on 1992, mainly due to the recession, imports of textiles, timber, paper and pulp, grain and other general merchandise improved markedly during the year.

Paper and pulp imports from Scandinavia and the Baltic rose by nearly 30% to 126,500 tonnes, and timber by 42% to 4,250 tonnes, with cargoes destined for distribution throughout Scotland and as far south as Manchester.

Dundee strengthened its role as eastern Scotland's leading grain port, with imports of animal feedstuffs and malting barley up by more than 40% to 51,200 tonnes. Exports travelled as far afield as Russia, Japan and Canada.

Oil-related activities in Dundee experienced a welcome expansion during 1993, reflected in a doubling of oil-rig supply exports to 5,440 tonnes. As well as becoming Stolt Comex Seaway's new UK base, Dundee was chosen by Western Petroleum from 12 possible candidates as the ideal base port for the Western Renaissance — the world's most advanced well-stimulation vessel.

MacGregor Engineering continued to advertise the attraction of Dundee for rig repair and maintenance, with a series of visitors including the Western Pacesetter IV, the Sedco 703, and the Uncle John arriving during the year.

The recently upgraded ro-ro facility at Eastern Wharf was extensively used during the year for importing newsprint and motor vehicles, and by the military to move equipment and personnel to overseas manoeuvres.

The five-year investment programme got under way in 1993 with some £925,000 being spent on re-sheeting and re-roofing warehouses throughout the Port estate. In particular, two sheds were refurbished for the use of subsea engineering contractor Stolt Comex Seaway, which has set up its main North Sea base in Dundee.

Construction also began on two new sheds with a combined capacity of more than 60,000 sq.ft. (5,575 sq.m.). After completion this Spring, one will be used for general storage and the other, featuring specially strengthened grain walling, for bulk cargoes.

The £600,000-project to install a new caisson gate and bridge in Camperdown

Lockway, totalling £600,000, is well advanced and will help to preserve the integrity of the Grade A listed inner Camperdown and Victoria Docks.

Another significant capital project is the £200,000 programme of dredging currently under way to enable selected wharves to cope with the trend towards larger offshore-related vessels calling at Dundee. DPA has also placed an order worth £900,000 for an additional mobile crane, scheduled for delivery in the summer.

Dundee: Cruise Trade Set for Growth

Dundee looks set to strengthen its position as one of Scotland's leading sea-cruise destinations in 1994.

Dundee Port Authority has received the year's first booking for a cruise-ship to berth in Dundee.

The cruise liner *Explorer*, on charter to SAGA Holidays, will call at Dundee in June and again in July as part of the company's programme of round-Britain cruises.

The news comes in the middle of DPA's preparations to attend the world's premiere cruise industry exhibition in the United States next week.

"This is a very encouraging start to the year," said DPA marketing manager Fiona Wilson "It's a vote of confidence in Dundee as a cruise-ship destination which will give a tremendous fillip to our efforts to promote the Port to the international cruise industry."

Fiona is representing Dundee at the huge Seatrade Cruise Shipping Convention, taking place in Miami, Florida, 1-5 March. The conference attracts hundreds of exhibitors and delegates from all over the world, offering an unrivalled opportunity for ports such as Dundee to promote themselves face-to-face to a major industry.

DPA is exhibiting at Miami as part of Cruise Europe, a cooperative marketing organisation which represents 35 European ports. Cruise Europe was set up to raise the profile of northern European waters, especially around the UK and Scandinavia, as an attractive cruise destination.

DPA joined Cruise Europe more than two years ago, and exhibited with them at last year's Seatrade event. The effort paid off with two visits by the cruise liner *Illiria*, and one by the *Funchal*

during 1993 — the first cruise visits to Dundee for many years.

The American-owned *Explorer* will be using Dundee to set down and pick up passengers on cruises round the coasts of Britain. She will be docking at DPA's purpose-built passenger terminal at the Port's King George V Wharf, which has full customs facilities and is only a few minutes' walk from the city centre. It is also ideally placed for tours taking in not only the attractions of Dundee itself, but also the scenery and historical locations of Angus, Perthshire and Fife.

"We are offering riverside berths on one of the most beautiful estuaries in Britain, which ships can reach without having to negotiate lock gates or other delaying factors," said Ms Wilson. "I am confident that the *Explorer* will be the first of many cruise visitors in the years to come."

Felixstowe: Extension Of Trinity Terminal

Throughput at the Port of Felixstowe increased 11% in the early months of 1994 after another record year — 1,137,947 containers (1,638,644 TEUs), including 49% of the British deepsea traffic.

Growth on such a scale justifies its intention to start constructing a further extension to Trinity Terminal in the second half of 1994 for use by early 1996.

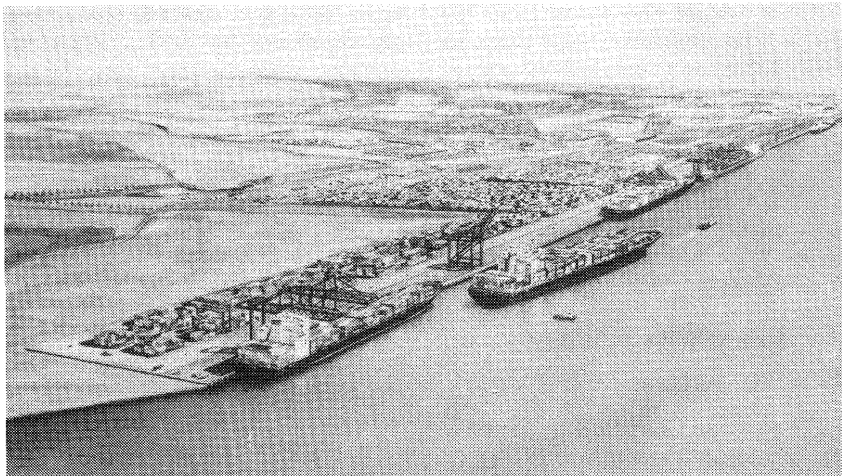
The £45 million (\$67.6 million) investment will comprise a 630 metre peninsular quay on 8.56 hectares (21 acres) of reclaimed land, two deepwater berths, three post-panamax cranes and associated operational space and equipment.

This constitutes the first phase of "Trinity III," the final stage of development authorised by the UK Parliament in 1988.

The finger quay will enable Trinity Terminal to handle an additional 300,000 containers a year, raising Felixstowe's annual capacity to more than 1.5 million.

It will also give the terminal, already the longest in Europe, a continuous straight quay of 2.334 km capable of berthing simultaneously eight of the largest containerships.

Felixstowe is among the world's top



five privately-owned ports, an exclusive league headed by sister company HIT in the Hutchison Whampoa Group. Ranked by container figures for ports generally, Felixstowe is fourth in Europe, 15th worldwide.

A beacon of free enterprise when all other European ports of any size belonged to their states, provinces or cities or to public trusts, the Felixstowe community pioneered both English containerisation in 1967 and computerised marine cargo control globally in 1984.

Mr. Derek Harrington, the Port's Managing Director, says new investment is essential for Felixstowe to stay competitive for ocean-going business

with Rotterdam, Hamburg and Antwerp.

He is a leading campaigner for equal treatment of ports in the European Union. Mr Harrington argues that those on the mainland should not be heavily subsidised from public funds and that those in Britain ought not to be handicapped by light dues not imposed on their continental rivals.

When the extension is operational, Felixstowe will be able to berth 11 large containerships at 2.77 kilometres of container quaysides at Trinity and Landguard terminals, in addition to smaller vessels elsewhere in the Port.

Felixstowe will then have 21 quayside gantry cranes (12 of them post-pana-

max), 60 rubber-tired gantry cranes, 175 terminal tractor units, four gantry cranes for railfreight, 26 roll-on roll-off tractor units, 675 trailers, mafis and general cargo flatbeds, 150 forklift trucks and four luffing cranes.

Operations extend over one large but compact and secure area, undivided by natural or made-made barriers, and therefore conducive for transshipment traffic, which now accounts for more than one fifth of Felixstowe container business.

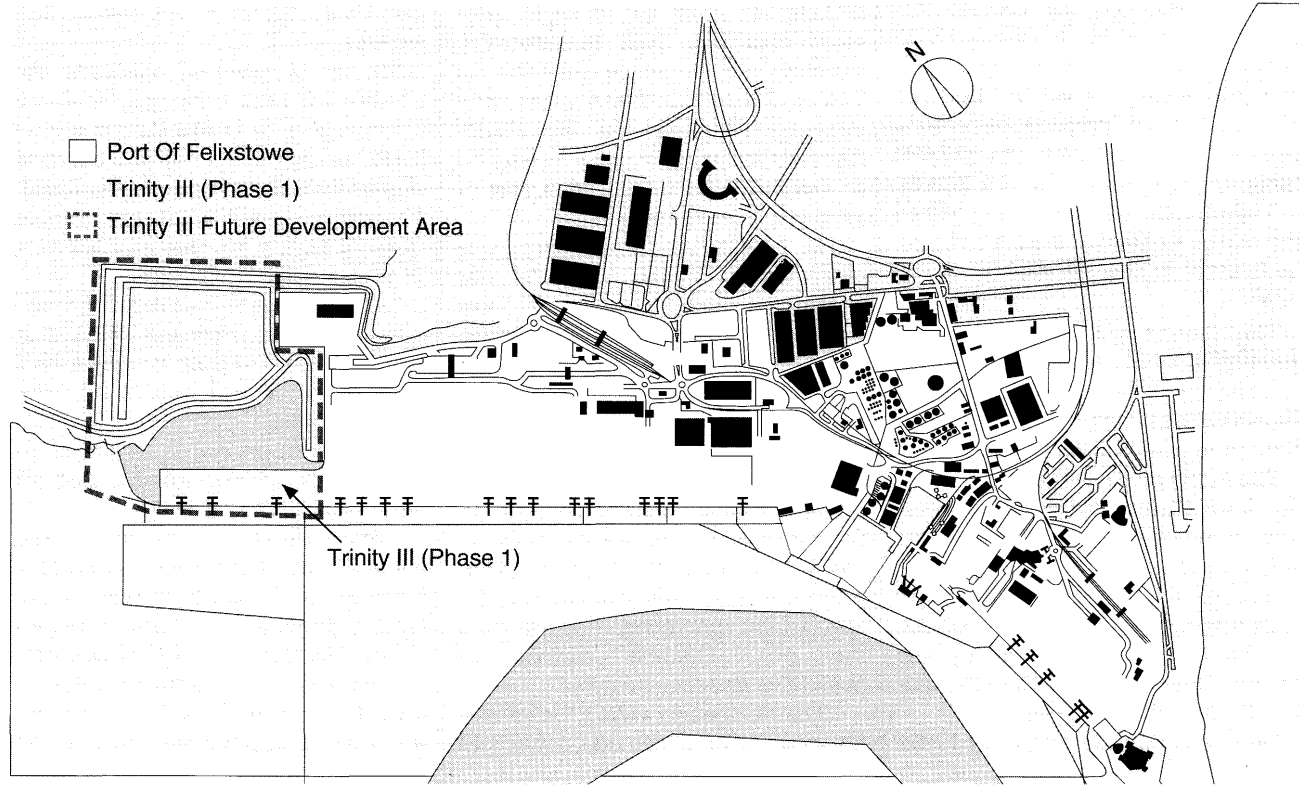
An earthen tree-planted bund will help to screen the extension and an area of 61 hectares (150 acres) available for reclamation in the future.

Adjacent to this area, a Port-funded nature reserve is an example of co-operation built up over the years between what would appear at first sight to be conflicting interests.

There are also environmental benefits resulting from the biggest capital dredging under way for a European port, the deepening of a 10 km (six mile) channel into Felixstowe.

By July the £21 million scheme will have increased the channel depth by 1.5 m to a minimum low water depth of 12.5 m.

Unrestricted entry departure on mean low water spring tides for vessels up to 11.4 m draught, and movement of 13.1 draught ships on any day, will



by then take the Port into line with European mainland terminals used by container ships on the same deepsea routes that Felixstowe serves.

It is determined to keep its position as a major hub and ability to fit into any rotation by all container ships, including those envisaged in the foreseeable future.

Felixstowe guarantees to meet any shortfall in revenue should Harwich Haven Authority suffer consequential loss.

Both are confident, however, that the deepening will pay for itself over a 15-year loan period and not cause higher charges to users.

The project was the first in the UK to be subject to a full environmental assessment, which accompanied an evaluation of operational needs and extensive hydraulic studies.

British and Dutch vessels employed by main contractor Westminster Dredging include the trailing suction dredgers W D Medway II, Cornelis Zanen and Sospan, the bucket dredger W D Mersey and trawler Concordia Constants.

Sand and gravel dredged is being used as fill for reclamation and sea defence works. The trawler has been lifting sandstone boulders that, dropped into an older trench, form a breeding ground for lobsters.

One section of the scheme has deepened a taker berth serving Felixstowe Tank Developments (FTD), a firm now wholly owned by the Port. National Freight Company sold its 80% control of FTD, which has 112,000 cubic metres of storage for bulk liquids.

Roll-on roll-off facilities have helped Felixstowe to become Britain's biggest importer of high-grade papers, mainly Finnish.

This Nordic link is given special meaning by a terminal dedicated to the trade and by the appointment of Derek Harrington as Honorary Consul for Finland in East Anglia.

The FinnTransit Terminal, in which the Enzo-Gutzeit subsidiary of that name is partnered by the Port, covers 40,960 sq m.

Its third and latest component, a joint venture warehouse costing £1.8 million, has been officially opened by the Finnish Ambassador to the UK, His Excellency Leif Blomqvist.

Quality paper also arrives at Felix-

stowe in barges that arrive from the US Gulf by semi-submersible ships. In 1993 Felixstowe handled a record 651,758 tonnes of paper.

Overall tonnage of cargoes through the Port last year rose by 12.7% to 20,303,113 tonnes.

Asia/Oceania

Geelong: First Aussie Rice to Japan in 30 Yrs.

The Port of Geelong has played a key role in an historic first export of Australian rice to Japan in 30 years.

Three shipments of bagged rice left Corio quay North during January and February for Ricegrowers Co-operative Limited. A temporary emergency lifting of Japan's ban on the import of rice followed a disastrous 1993 harvest. Political manoeuvring through recent GATT talks also helped to pave the way for the new trade. A 25 per cent decrease in Japan's usual 10 million metric tonne harvest, due to a cool and humid summer with stronger than normal typhoons, has seen Thailand, USA, China as well as Australia selected as countries of emergency supply.

Japan's rice production is traditionally heavily protected to keep the country self-sufficient in its staple food, making the grain six to eight times more expensive than in Australia. January's 10,500 tonne shipment to Tokyo aboard the *Winter Moon*, and February shipments on the *Winter Sea* and the *Spring Dream* were trucked to Geelong from the Riverina area of southern New South Wales.

The high quality product was specially milled for the trade and was cool-stored prior to transport. It was loaded into refrigerated vessels immediately upon delivery to the wharf.

International Marketing Manager for Leeton-based Ricegrowers Co-operative Ltd, Ross Allan, said samples of the Australian crop had to undergo stringent testing before being approved for purchase, including analysis for 53 residue chemicals. Mr Allan said Ricegrowers would continue to supply under the current emergency imports until the new Japanese harvest in September/October this year.

"The Uruguay GATT meetings, however, have meant that Japan will

begin looking at ongoing commercial imports of rice by 1995. "While the tonnages will be nowhere near the size of the current emergency imports, commercial imports will create the opportunity for continued access to the market. "Ricegrowers Co-operative has been working for many years to position itself in Japan on the prospect of a successful GATT resolution", Mr Allan said.

Ricegrowers use the Port of Geelong for most of its non-containerised and bulk export shipments. Mr Allan said Geelong had excellent loading facilities and would be the focus of future export shipments from the company.

(Portside)

Clinton Coal Facility: High Quality Endorsed

The Clinton Coal Facility is one of Australia's first coal export facilities to achieve certification.

GPA Chairman, Mr Leo Zussino welcomed this positive reinforcement of Clinton's reliability.

"The achievement of Quality Certification for coal handling at Clinton Coal Facility is another significant milestone in Clinton's success record," said Mr Zussino.

"As the operator of the terminal, Gladstone Port Authority aims to provide its customers with high quality service.

"In its 14 years of operation the Facility has been expanded from two (2) stockpiles to twelve (12), a second berth has been added, and now a second shiploader is about to be commissioned. The original 10 million tonne per annum capacity facility now has a capacity of 30 mtpa.

"All of this has been achieved through growing customer demand which must attest to the manner in which this publicly owned and operated facility has performed.

"That performance is testament to the attitude of management and all those who work at Clinton.

"That attitude is reflected in the manner in which the workforce became involved in the establishment of the Quality System, and I know will continue as the System is further improved.

"Our ideal is to operate Clinton in accord with World's Best Practice and this current achievement puts us on

target to attaining that ideal.

"I congratulate all who have been involved in developing and operating the Quality System that has led to Certification.

"Our customers and markets throughout the world are assured of quality service, which reinforces Clinton as a reliable and efficient performer."

Gladstone Port Authority Quality Policy Statement

The Gladstone Port Authority is a Statutory Authority which controls and manages the Port of Gladstone.

The Quality Policy Statement relates to operations at the Clinton Coal Facility and Auckland Point bulk handling facility which are owned and operated by the Gladstone Port Authority.

The main activities include the receiving, handling, stockpiling and shiploading of customer owned products for both the Australian and overseas markets.

The Gladstone Port Authority has been operating the Clinton Coal Facility and Auckland Point bulk handling facility to the satisfaction of customers since their inception.

The objective of the Gladstone Port Authority is to provide a service second to none, whilst at the same time maintaining the quality of all products handled at its facility in accordance with international standards and regulations.

It is our intention to provide a service which is cost effective without removing the ability to maintain the highest levels of quality.

The Authority and all employees of the Gladstone Port Authority are committed to this Quality Policy. This shall be demonstrated by their professional approach and attitude in relation to quality.

The Gladstone Port Authority shall establish and maintain an effective Quality System by continually striving to improve services and encouraging employee involvement in the development and implementation of quality practices.

The Quality System of the Gladstone Port Authority has been based on Australian Standard AS3902 - 1987/ISO 9002 - 1987.

The implementation of this Quality

System shall ensure we have the ability to maintain, whilst always trying to improve, our competitive position within the market place.

The Quality System shall be implemented in phases. Phase I shall cover the coal operations at the Clinton Coal Facility. Phase II shall cover the grain, magnesite, woodchip and marble operations at the Auckland Point bulk handling facility. (Port-Talk)

***Survey Finds Ports Infrastructure Inadequate**

(Reproduced from "INDIAN SHIPPING", the Journal of the Indian National Shipowners' Association)

The need for expansion and modernisation of port capacities to meet the demands of export growth and industrial output in the coming years has been stressed in the pre-budget economic survey of the government for 1992/93.

The survey states that though port productivity in terms of ship turnaround time and average ship-berth-day output has improved, labour and equipment productivity continues to be low.

Privatisation of selected activities is stressed as one of the measures by which port capacity, infrastructure, productivity and performance can be improved.

There is also urgent need for amendment of legislation affecting shipping, ports and other modes of transportation.

Further, port customers procedures and documentation require to be rationalised and modern electronic data information systems developed in keeping with similar practices at other international major ports.

Impact on Shipping Profitability:

The profitability and commercial utilisation of Indian shipping is substantially affected by the following constraints and deficiencies that continue to exist at Indian ports:

— Greater turnaround time of ships

* This is the text of the Note on the subject presented by INSA to the Planning Commission.

due to inadequate facilities to handle modern large size vessels.

- Insufficient facilities for dredging of berths and channels to maintain available drafts.
- Nonavailability or under-utilisation of cargo handling gear at docks.
- Inadequate maintenance of equipment resulting in frequent breakdown and delays in loading/ discharging operations.
- Inadequate and outdated storage/warehouse facilities.
- Delays in clearance of cargo from docks and transit sheds causing heavy congestion.
- Outmoded ports and customs documentation/procedures.
- Low labour productivity, indiscipline and frequent industrial action.

All of the above factors adversely affect the operational efficiency of Indian ships and erode our competitive advantage vis-a-vis foreign shipping. Some of these issues are discussed below:

Port Productivity:

The shipping industry has long been stressing that our ports should place greater emphasis on increasing efficiency of services and output as these factors play a vital role in the economic development of the country.

The existing levels of output in terms of cargo handled at Indian ports are relatively low in comparison with other world ports.

This is despite the fact that over the years there has been progressive mechanisation and the ports employ a much larger labour force for similar operations. While several of our ports have installed modern cargo handling equipment, there has been no significant change in the manning scales per tonne of cargo handled and the norms are based on standards fixed several years ago.

It is essential that manning scales and output norms are redefined in keeping with technological changes and development.

Equipment utilisation is also low in relation to its rated capacity due to operational constraints, poor maintenance practices, lack of spares and power failures. These factors lead to non-utilisation of specialised equipment acquired at high cost to handle bulk commodities as well as container

cargo.

Container Handling:

In the case of container handling, the productivity at Indian ports compares poorly with results achieved abroad. This is referred to in the Eighth Plan document.

The number of TEUs handled per crane per hour ranges from 7 in Bombay to 15 in Madras and compares to 26 in Colombo and 32 in Singapore.

Modernisation of handling facilities to handle the growing container traffic at ports needs to be given high priority. Concurrently, it is necessary to rationalise the container handling charges and tariff structure.

In the context of the plan programme of encouraging multi-modal transportation of goods, it is necessary to strengthen the inter-modal linkages, improve inland infrastructure and streamline customs procedures so as to optimise the multi-modal approach.

Service Deficiencies:

There are several other deficiencies in port service facilities. Lack of adequate security arrangement results in large scale pilferage and theft. The ports have not kept pace with international Convention requirements for oil pollution prevention and slop reception facilities.

There are also deficiencies in fire fighting arrangements and communication facilities. There is need to improve the service facilities to ship such as supply of fresh water and bunkers. Port navigation facilities (particularly night navigation for tankers), provision of exclusive layup berths and providing adequate number of tugs with sufficient capacity to handle larger vessels also need to be considered.

Port Tariffs:

Government has approved a scheme where major ports are now permitted to quote tariffs for vessel related charges in US Dollars for all foreign going ships (Indian flag and foreign flag).

The port charges are payable in Rupees at the prevailing market rate of exchange and have substantially increased the port revenues due to the depreciating value of the Rupee.

Steep increases are progressively effected in port charges without co-relation to improvement in productivity or turnaround of ships. Increases have

also been effected in the light dues for foreign-going and home-trade ships.

The shipping industry has continued to plead with government that Indian port costs are among the highest in the world without a commensurate return in productivity and turnaround time of ships.

Minor Ports:

There is an urgent need for development of minor ports and associated infrastructural facilities for servicing the movement of coastal cargoes in view of the various problems encountered in handling such cargoes at major ports.

As is the experience, major ports are fully utilised for overseas vessels and ships on coastal trade get low priority. Moreover, coastal vessels have to contend with unviable cargo handling costs at major ports due to the tariffs imposed by the dock labour boards.

Availability of funds has been a major problem in development of minor/intermediate ports. As minor ports come under the control of state governments, development of facilities would take place only if there is adequate potential for cargo generation for coastal shipping.

Government should therefore, encourage private entrepreneurs to jointly develop minor/intermediate ports for servicing the specific needs of industries. However, this would require adequate support from the state and central governments in development of infrastructure.

Additional Capacity Requirements:

The Eighth Five-year Plan (1992/97) has projected that there will be an increase in traffic at major ports from 155 million tonnes in March 1992 to 229 m.t. by March 1997. Towards this end, it visualises actual physical capacity addition of 85.91 m.t. (from the present level of 167.58 m.t.).

The breakup of this capacity addition would be 29.5 m.t. for POL; 35.5 m.t. for Coal; 10.75 m.t. for Containers; and 10.16 m.t. for General cargo.

The increase in capacity has been envisaged for most major ports including Paradeep, Madras, Cochin, New Mangalore, Kandla, JNPT, Tuticorin, Haldia, Mormugao and Bombay.

The shipping industry is in full concurrence with this programme and it

is necessary to ensure that it is given a high national priority to support the growth in the country's trade and economy as well as ensure optimal utilisation of Indian ships.

Recommendations

The Eighth Plan document has placed great emphasis on the following areas for port development:

- Modernisation of facilities and use of new technology to improve efficiency.
- Maximum utilisation of existing facilities and infrastructure through operational and managerial measures.
- Expansion of facilities to handle at least 50% of general cargo in containers.
- Deepening of drafts at selected major ports.
- Improvement in productivity of labour and equipment.
- Improvement in financial viability of ports.
- Explore alternate sources for funding port development.
- Encourage private sector participation in selected port activities.

The shipping industry along with other port users welcome the moves to encourage private sector participation in development of new port facilities in select areas.

The industry has been urging government that ports should truly function as public utility concerns not only to shipping but in fact to the national economy of the country.

Particular attention therefore needs to be placed on improving the port infrastructural services and implementing the development plans to complement and support the projections of trade and traffic flows.

News from Port of Nanjing

1. Becoming a regular member of IAPH was chosen through public appraisal as the second of the Ten Great Events for the Port of Nanjing in 1992/1993.

2. The construction of a railway at Xinshengwei Terminal, started in November 1993, will play an important

role in accelerating the collection and distribution of cargoes through the terminal and in developing transportation for the foreign trade involving the Port of Nanjing. Railway track covering 4,943 m and 5 branches will be laid, running through the bulk, container and multi-purpose berths of the terminal from east to west. It will be linked up with the Xinshengwei Railway Station outside the terminal.

The project is expected to be completed by December 1995. With the completion of the special railway line within the terminal, the cargoes for import and export through the terminal could be transported and distributed by railway, highway and waterway, creating a sound environment for the development of foreign trade in Najing, Jiangsu and the regions along the upper and middle reaches of the Yangtse River.

3. The cargo volume handled by the Port of Nanjing in 1992 was 46.71 m. tons, an increase of 2 m. tons over 1991, which recorded the highest volume of cargo for the Port on record. In 1993, the cargo volume of the Port reached 47.14 m. tons, among which goods for foreign trade accounted for 5.24 m. tons, while the Port handled 5.77 m. tons of crude oil from sea to river. The Port of Nanjing has set records for two years in succession.

4. The examination meeting on the Overall Plan of the Layout of the Pivotal Ports & Harbors in China was held by the Ministry of Communications in Guangdong in the middle of November 1993. At the meeting, the Port of Nanjing, as a large-sized sea-river port, was appraised as one of the pivotal ports of the country and ranked top among the river ports in China.

It is projected by the Overall Plan of the Port of Nanjing, which was examined jointly by the Ministry of Communications and Jiangsu Province in June 1993, that the volume of freight through the Port will reach 150 m. tons by the year 2020. (Wang Jian, Executive Office, Nanjing Port Authority)

7th Pan-Pacific Ports Seminar in Yokohama

— July 4-7, 1994 —

The 7th Pan-Pacific Ports Seminar will take place at PACIFICO YOKO-

HAMA from July 4 to 7, 1994. This series of biennial seminars has been held in accordance with the agreement made between the Ports of Oakland and Yokohama when they entered into a Sister Port relationship in 1980. Since the first gathering took place in Oakland in 1982, the founding ports of Oakland, Yokohama, Vancouver, Melbourne and Shanghai have sponsored this seminar in turn. Ten years have passed since the Port of Yokohama hosted the 2nd Pan-Pacific Ports Seminar last time in 1984. The 7th Pan-Pacific Ports Seminar on the main theme "New Developments in Pacific Trade, Shipping & Transportation and Ports — Challenges towards the 21st Century" includes Guest Addresses and three sessions on Trade, Shipping & Transportation and Ports.

Mr. N. Matsunaga, former Japanese Ambassador to the United States, will take part on the morning of July 5 and deliver a Guest Address, while Mr. K. Ejiri, Chairman of Japan Foreign Trade Council Inc., is to provide a keynote address for the Trade Session in the afternoon. Mr. M. Miyoshi, Director General of KEIDANREN (Federation of Economic Organizations), will act as moderator for the session where a panel discussion with six panelists, including representatives from JETRO (Japan External Trade Organization) and ACCJ (The American Chamber of Commerce in Japan), will be held.

Mr. H. Ichihi, Chairman of Japan Shipping Exchange, Inc. will lead the Shipping & Transportation Session on July 6, which includes a keynote address from Mr. S. Tenporin, Chairman of Japanese Shipowners' Association. The session will provide a panel discussion, with panelists representing NYK, APL and other organizations. In the Ports Session in the afternoon, Mr. F. Fujino, Director General of the Japan Port and Harbor Association, will act as moderator for a panel discussion with panelists representing the participating ports.

Penang: New Terminal Management System

The newly corporatised Penang Port Sdn Bhd (formerly Penang Port Commission — PPC), has awarded the

contract for a comprehensive computerised container terminal management system to a consortium led by India's leading systems integrator CMC Limited and Komputer Sistem Malaysia Sdn Bhd. This project is part of the ongoing modernization plans of the Malaysian government for the port and shipping sector.

Strategically located in one of the most industrialized regions of peninsular Malaysia, the port of Penang serves the needs of its hinterland, and also acts as a key transshipment centre for containers and cargo to and from Myanmar, Thailand and Bangladesh.

At present, all container handling activities are concentrated at Berths 4-6 at Butterworth Wharves, on a total quay length of 49 meters. Ship-to-shore cranes comprises of two Hitachi units (one on lease from Asia Port Equipment), one 35 tonne Mitsubishi, and a recently acquired Samsung unit.

In an attempt to cope with container traffic growth, the port had embarked on a four-phase US\$120 million project in early 1991, to develop container facilities at the newly-constructed North Butterworth Container Terminal (NBCT).

The computerised container terminal system is meant to cater to the requirements of the terminal (the first phase of which is nearing completion), as also of the existing terminal where the present system is being phased out.

The port had released a global tender in 1992 for complete design, development, supply, implementation and maintenance of the container terminal management computer system. After an exhaustive evaluation process, the contract was awarded to CMC Limited and its Malaysian partner Komputer Sistem Malaysia (KSM), a bumiputra company and a leading local systems integrator who will be installing the hardware, networking and communications infrastructure, in association with Teklogix Inc. of Canada for the radio data transmission (RDT) system. With this latest success, CMC's highly customizable Mach software has firmly established itself as one of the world's leading product in the intermodal container and cargo management industry.

Among the benefits that the port expects to achieve with the installation of the new container terminal man-

agement system are streamlined planning and operations control to optimize equipment and resource utilization; provision of interfaces with the computer system at PPSB Headquarters; and linkages to external users either directly or through Electronic Data Interchange. The net result will be enhanced productivity with spin-off advantages to port users, and increased competitiveness for PPSB as it embarks on its ambitious path of privatization.

PPA Board Okays New Port Charges

The Philippine Ports Authority (PPA) Board of Directors has approved in principle the new port charges.

Implementation, however, is subject to final approval of the President. The board action is only recommendatory in nature.

If the new rates are approved by the President they are to be published in a newspaper of general circulation for the information of the public.

By virtue of resolution number 1337, the board agreed to rate increases to be implemented in two (2) steps. Dollar-dominated tariff items shall increase by 20 percent this year and ten percent next year. Peso-dominated tariff items, on the other hand, shall increase by 40 percent this year and 20 percent next year. All increases are based on existing rates before the board approval.

The board also approved the reduction of berthing and usages fees in private ports to 50 percent or half of government port rates, since expenses in their construction are shouldered solely by the private port owners.

For the same reason the board abolished the percentage share in cargo handling income in private ports. Instead, a fixed fee ranging from P10,000 to P20,000 per annum will be applied, depending on the size of the private port.

The basis for charging wharfage shall be metric ton instead of revenue ton, to serve as a common conversion factor in the computation of the charge. The minimum charge for domestic wharfage will be P5.00, and foreign wharfage, P10.00.

The maximum charging base for dockage, on the other, is increased to 50,000 GRT from 30,000 GRT since the Authority now serves more modern

vessels or the third generation vessels.

Rates for the storage charges remain the same.

The PPA's Commercial Services Department (CSD) is closely studying the possible effects of converting the assessment of berthing fee from per GRT per calendar day or fraction thereof to per GRT per hour.

The hourly charge of berthing fee (dockage) issue was raised by the Association of International Shipping Lines (AISL) during one of the dialogues conducted by PPA on the matter.

Considering the impact of this issue on both domestic and foreign vessels, the CSD is conducting a detailed study as a component of the new port rates.

(Port Trends)

Port of Tauranga: No. 1 For New Zealand Forestry

Millions of dollars have been cut from the cost of log shipments from the Port of Tauranga since port reform, leading overseas log buyers to name Tauranga the most efficient log loading port in the world.

Company Secretary for the Port of Tauranga Athole Herbert told delegates to the recent Forest Industries 1994 conference that the Port of Tauranga handled 51 percent of the country's total log exports in 1993, with log and timber vessels spending an average of 2.8 days at the port. Prior to port reform in 1989

log ships spent an average of 8.4 days in port. While ship numbers have increased from 530 to 857 in that time, berth occupancy has reduced from 70 percent to 32 percent.

"If you take a conservative value of a log ship's fixed costs of US\$10,000 per day then we are saving 5.6 days multiplied by US\$10,000 which equals US\$56,000 per vessel each call," he said.

"If we look at the throughput for logs last year of 2.37M divided by an average loading of 25,000 tonnes, you can see savings of millions of dollars in ship costs alone.

"The paradox here is that ships charges are based on the time spent alongside, so there has been a huge loss of income to us brought about by the increasing efficiency of the port and its now 24-hour-a-day operation."

Mr Herbert said many major forest owners were now chartering their own vessels to ensure that the huge savings remained in New Zealand and were not picked up by the overseas ship owner.

Mr Herbert said the efficiencies brought about by port reform and the independent nature of the stevedoring and marshalling companies operating at Tauranga had led Japanese log buyers to name Tauranga as the most efficient log loading port in the world.

"We are internationally competitive and our targets for the future are based on the international market, not just a comparison with New Zealand ports".

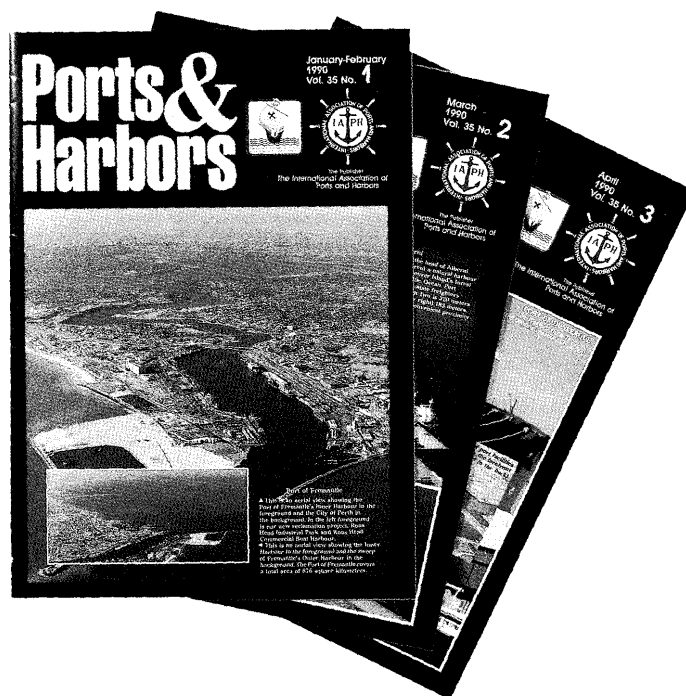


Pictured at the Port of Tauranga's exhibition at the Forest Industries conference are (from Left) Dave Williams, Seatrans; Mike O'Rourke, Port of Tauranga Ltd, and Phil Orme, Forestry Corp.

AN ADVERTISING OPPORTUNITY TO TALK TO THE WORLD'S PORTS

"Ports and Harbors"

The official journal of IAPH, "Ports & Harbors" provides a forum for ports to exchange ideas, opinions and information. Published ten times a year as a magazine by ports, about ports and for ports, "Ports & Harbors" includes inside reports before they become news to the rest of the world. This insiders' magazine is indispensable for port officials who make decisions that affect their industry. If your business requires you to talk to the people building and guiding activity at today's ports, you should be advertising in this journal.



General Information

Format:

Trim size 296mm × 210mm, normally 40 pages

Language:

English

Closing Dates:

Order Closing:

One month preceding publication date (January 20 for the March Issue)

Material Closing:

3 weeks preceding publication date (January 31 for the March Issue)

Agency Commission:

15% to accredited advertising agency

Advertising Material:

Black & White - Positive film right reading emulsion side down; full color films same as black & white; progressive proofs to be supplied. Screen: B/W 133; color 133. Camera ready layout or repro proof accepted; film production costs to be borne by advertiser.

All advertising materials to be sent to:

The International Association of Ports and Harbors (IAPH)

Kotohira-Kaikan Building, 2-8, Toranomom 1-chome,
Minato-ku, Tokyo 105, Japan

Tel: (03) 3591-4261 Fax: (03) 3580-0364

Advertising Rates

Black & White Rates (In Japanese Yen)

	One time	Three times	Six times	Ten times
Full page	100,000	97,000	95,000	90,000
1/2 page	60,000	58,200	57,000	54,000
1/3 page*	35,000	33,900	33,200	31,500
1/4 page	27,000	26,200	25,700	24,300
Cover 2	143,000	138,700	135,800	128,700
Cover 3	117,000	113,500	111,200	105,300

* 1/3 page accepted only in WORLD PORT NEWS Section.

Full Color Rates for Covers

Cover 2	263,000	255,100	249,800	236,700
Cover 3	237,000	229,800	225,200	213,300
Cover 4	270,000	261,900	256,500	243,000

Color Charges:

¥40,000 per standard color per page. Four Colors:
¥120,000 additional.

Special Position:

10% surcharge.

Bleed:

20% surcharge.

IAPH Membership Discount:

10% discount of total insertion costs to IAPH Members.

Mechanical Data

Trim size	296 × 210mm
Full page	250 × 175mm
Half page	120 × 175mm(H) or 250 × 84mm(V)
1/3 page	88 × 175mm(H) or 244 × 56mm(V)
1/4 page	60 × 175mm(H) or 120 × 84mm(V)
Bleed size:	302 × 215mm

TO RECEIVE AND RENDER SERVICES TO SHIPS FOR A BETTER FLOW OF OUR FOREIGN TRADE



**ACCUEILLIR, SERVIR ET ASSISTER
LE NAVIRE, POUR UNE MEILLEURE
FLUIDITE DE NOS ECHANGES.**

MOTTO: To serve the Nation, Africa and the World.

NOTRE DEVISE: AU SERVICE DE LA NATION, DE L'AFRIQUE ET DU MONDE.

**DOUALA PORT
LE PORT DE DOUALA**



**C.N.P.A.
O.N.P.C.**

CAMEROON NATIONAL PORTS AUTHORITY

MARITIME CENTRE-P.O.BOX 4020 DOUALA, CAMEROON TEL:42-01-33, 42-73-22 TELEX:5270 KN FAX:42-67-97

OFFICE NATIONAL DES PORTS DU CAMEROUN

CENTRE DES AFFAIRES MARITIMES, SIMAR-BP4020 DOUALA 6 CAMEROUN