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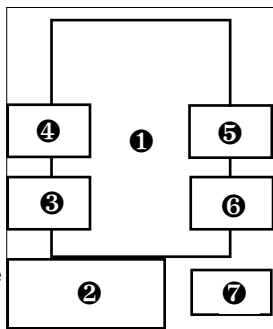
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Cover photos

1. Opening ceremony at Montreal Basilica (musical performance by the Montreal Symphonic Orchestra conducted by Mr. Charles Dutoit)
2. Photo took prior to Pre-conference board meeting (Sunday, 20 May)
3. Opening session (Monday, 21 May)
4. Ribbon cutting for Trade Show by Hon. Minister David Collenette (Monday, 21 May)
5. Reception for two South African Ministers - from left: RCMP officer; Satoshi Inoue; H. Thomas Kornegay; Akio Someya; South African Minister of Transport Hon. Abdulah M. Omar; Dominic J. Taddeo; South African Minister of Public Enterprises Hon. Jeff Radebe; Pieter Struijs; and RCMP officer. (Thursday, 24 May)
6. President Dominic J. Taddeo receives the Scroll of Honor as honorary member from his successor Someya at the 2nd plenary session (Friday, 25 May)
7. "Farewell, Meet Again in 2003" at the Gala Dinner (Friday, 25 May)



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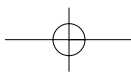
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MOMBASA: THE CRUISE SAFARI PORT ON THE INDIAN OCEAN



Luxurious Passenger Liner M/V Pacific Princess at the Port of Mombasa



Lions at Game Reserve



The Historical Elephant Arch along the Mri Avenue which leads to the Port of Mombasa

THE PORT OF MOMBASA

Your Dream World Cruise Destination

The Port of Mombasa is one of the world's favourite ports of call for Cruise liners on international itineraries. The attractiveness of Mombasa with its unique cruise/safari experience makes it the most exciting and exotic destination for cruise passengers.

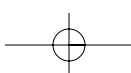
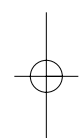
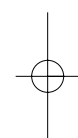
This attractive destination offers:-

- Dedicated berthing facilities and all harbour services for cruise liners.
- Well organised and memorable shore excursions which include the game safaris to Kenya's world famous game reserves which are within close proximity to the port.
- The port's close proximity to an international airport (only 8 kms away) makes the port ideal for sea/air and air/sea interchange for cruise passengers.
- Mombasa has World Class and well developed Hotel facilities, friendly people, beautiful and clean sunny beaches that stretch along the entire Kenyan Coastline.



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22e CONFÉRENCE MONDIALE DES PORTS DE L'AIPH, DU 19 AU 26 MAI 2001
22ND IAPH WORLD PORTS CONFERENCE, MAY 19-26, 2001

2001, A MARITIME ODYSSEY

22nd World Ports Conference

Montreal 19-26 May 2001

Address by Dominic J. Taddeo

President of the IAPH and President and CEO
of the Montreal Port Authority

Opening Business Session, 22nd IAPH World Ports Conference
21 May 2001, Montreal, Quebec

Good morning. And once again, welcome to Montreal.
Welcome to "2001: A Maritime Odyssey"

IAPH is often referred to as the "United Ports of the World," in our common mission to represent and promote the global interests and concerns of maritime commerce. It is because of the IAPH's unique standing in our global industry that it has been granted consultative status as an NGO, a non-governmental organization, before six United Nations agencies, including the International Maritime Organization. Welcome to them, as well. They are truly the builders of one world in this new century.

We have indeed come a long way since 1955, and the founding convention of the IAPH in Los Angeles, where 126 delegates attended from 38 ports in 15 countries. Today, we are 230 member ports in 90 countries around the world, and 100 associations and institutes who are associate members of IAPH.

I'm uniquely privileged to stand before you in a dual capacity, as President of the IAPH and Conference President, and as President of the Montreal Port Authority, your host for this week.

It's a signal honour to declare open the working sessions of the 22nd biennial IAPH World Ports Conference, in the distinguished presence of Canada's Minister of Transport, the Honourable David Collette.



Following his speech, the Minister will officially open the conference trade show, which has attracted a record 50 exhibitors.

At the very outset, I want to thank the Chairman of the Montreal Port Authority, Mr. Raymond Lemay, and his colleagues on the board for their great support. I would also like to express my appreciation to our staff,

especially Mr. Jean Mongeau and his team, who have devoted more than two years to the detailed planning of this conference.

I also want to thank the IAPH Secretariat in Tokyo, and IAPH Secretary-General, Dr. Satoshi Inoue, for their devotion, far beyond duty, to our motto of "World Peace Through World Trade – World Trade Through World Ports."

The voyage to Montreal from Kuala Lumpur, has been a two-year journey, across the oceans, and through cyberspace. The Port of Montreal is honored to be hosting the IAPH biennial World Ports Conference for the second time, only the second city after London to achieve this distinction.

The last time the World Ports Conference came to Montreal, in this very hotel, was 30 years ago, in 1971. The world was very different then. The Montreal Canadians had just won the Stanley Cup, an annual rite of spring which we then took for granted in this city.

In 1971, the Cold War was at its height. Another kind of war, very real, was being waged in Vietnam. Pierre Trudeau was in the first of his four terms as Prime Minister of Canada. Richard Nixon was in the White House. Leonid Brezhnev was in the Kremlin.

The very idea of "World Peace Through World Trade" seemed not only remote, but implausible and even absurd. Global commerce of around US\$500 billion was only a trickle compared with today's \$6 trillion of international trade, fully one-fifth of the world's output.

The technology of maritime commerce, by today's sophisticated platforms and applications, seems quaint and amusing. Containerization was in its infancy, a far cry from today's US\$90 billion global industry that launched intermodal transportation.

In 1971, our computer programs were run off big IBM mainframes, into which we fed punch cards at pre-appointed times. Time-sharing was not a concept in condos, but in computers. In our offices, we worked on those state-of-the-art IBM "golf ball" typewriters.

It would be nearly a decade before the invention of the personal computer, which today accounts for 99% of the computer power in the world. It would be nearly 15 years before the invention of the cellular telephone, an industry which is expected to ship nearly 500 million handsets worldwide this year. It would be 20 years before the commercialization of the Internet, the fastest growing medium in world history.

The exponential growth of the new technologies has exceeded even the vision of their creators. Thomas Watson of IBM thought four or five mainframes would be all the world would ever need. Ken Olson, president of Digital Corporation, saw no reason why anyone would want a computer in the home. Even Bill Gates of Microsoft once said "640K of memory ought to be enough."

But Intel co-founder Gordon Moore foretold the dimensions of technological change, when he posited in Moore's Law that computer capacity would double every 18

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months. Today there is more power in your laptop than in the on-board systems that took man to the Moon and back. Networkers who once thought of moving "gigabits"—billions of bits of information per second, now conceive of "terabits"—trillions of bits.

As the eminent British scientist and commentator James Burke has written:

"When information surge happens, it sweeps through society in a powerful, innovating wave, that in some ways changes everything, everywhere."

These communications platforms, and their business applications, have revolutionized maritime commerce. Our industry is the oldest form of international commerce in the world, yet it is also among the newest. Shipping is decidedly an old economy industry, but it is run by new economy standards of innovation.

The shipping industry leads the way in innovation, from managing manifests via the Internet, to seamless intermodal transportation, to the electronic monitoring and control of water levels to the tracking of the global fleet by DGPS, the digital global positioning system.

These new technologies have resulted in huge productivity gains, improving the efficiency, safety and profitability of our industry.

None of these technological innovations could have been foreseen when the IAPH last met in Montreal 30 years ago.

And yet, in 1971, one of the two main plenary sessions was entitled "Computers and the Port." The other was called "Containerization."

One of the papers presented in 1971 had the following title: "Development of New Facilities Outside of Urban Center to Meet Container Challenge."

Plus ça change, plus c'est pareil.

Continuity and change are the permanent conditions of our industry. Since men first went to the sea in ships, maritime commerce has been the driving force of international trade.

And international commerce not only creates prosperity, it deepens our understanding of other cultures, while enriching our own. It has been this way since the time of the Phoenicians and the Venetians.

As the U.S. Federal Reserve Chairman Alan Greenspan recently said in Congressional testimony: "Open markets and free trade enhance the standard of living of all participants."

Trade is good. Trade works. It is the heart of our industry, driving its impressive growth.

Consider the following—in 1947, the year the GATT was created, international trade of US\$56 billion was less than 10% of the world's output. In 2000, the World Trade Organization reported 10% annual growth of international trade, and trade in excess of US\$6 trillion, or more than 20% of the

world's GDP.

International trade has grown by 10% a year compounded for the last 40 years.

Some 60% of those shipments, or US\$3.5 trillion worth of goods, move in ships through the world's ports, and 60% of that move through IAPH ports.

IAPH ports account for over 90% of the world's container traffic.

As John F. Kennedy used to say: "A rising tide lifts all the boats."

And then much of it moves by intermodal transport—by rail or truck—seamlessly off loaded in our ports without ever touching the ground.

Consider the role of innovation, not only in shipping, but in creating a dynamic segment of the transportation sector, intermodal transport.

Much of that growth is attributable to com-

puters and containerization, issues that were the highlight of the conference 30 years ago.

Ray Miles of CP Ships, who I understand will have some great news for us a little later today, has observed: "Container shipping has not only been the carrier of that growth, but one of the key drivers of it."

Thirty years later, it is clear that our industry has made an important contribution to the peace and prosperity of the world.

Thirty years later, the Cold War is but a memory.

The quest for "World Peace Through World Trade" is no longer an eccentric notion, but a world vision which can be achieved in our own time.

This, truly, is a Maritime Odyssey worthy of the name.

Thank you very much. And once again, welcome to Montreal. Bienvenue à Montréal.

Remarks by Dominic J. Taddeo Introduction of the Hon. David M. Collenette Minister of Transport

It's now my pleasure and privilege to present this morning's keynote speaker, the Honourable David Collenette, Canada's Minister of Transport.

In a country such as Canada—the second largest in the world, transport plays a crucial role in the public policy process. And Mr. Collenette has played an indispensable role in shaping a new Canadian transportation policy for this era of deregulation and privatization.

The creation of Canada as an Atlantic country in 1867, and its expansion west to the Pacific, required a bold and visionary transportation policy to bind the country together.

The nation-building role of the railway in the 19th century was assumed by air transport in the 20th century. But in both those centuries, as in this new century, maritime transport and ports have played a pivotal role in the life of this huge country.

At one time, the Ministry of Transport was one of the most bureaucratic departments of the Canadian government, overseeing a maze of regulations and a host of unprofitable crown corporations.

Today, thanks in no small measure to Mr. Collenette's leadership, Canada is playing an exemplary role in deregulation and commercialization.

On Minister Collenette's watch, the government has implemented the new Canada Marine Act, making the ports the masters of

their own destiny, and commercializing their mandates.

For example, here in Montreal, the board of the Montreal Port Authority consists of one member representing each of the federal, provincial and city governments, and four members representing the maritime community. The board's independence is underlined by the fact that it elects its own chairman.

And this port is profitable, indeed it has been for the last 21 years. We contribute to Canada's consolidated revenue fund and we pay municipal taxes.

David Collenette is one of the most senior ministers of the Chretien government, and one of the most influential, not only as regards transport policy, but across the broad spectrum of public policy.

Mr. Collenette also has broad experience in the private sector, and is the senior minister from the Toronto area, the centre of Canada's financial services and investment communities.

Normally at the end of a holiday weekend—this is Victoria Day throughout Canada as well as Dollard-des-Ormeaux Day in Quebec, the minister would be with his family, or attending an event in his riding. So I want to pay him a special thanks for travelling to Montreal to be with us today.

His theme couldn't be more important: Canada and the World Economy.

Ladies and gentlemen, Canada's Minister of Transport, the Hon. David Collenette.

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Speaking Notes for Minister of Transport David Collenette

to the World Ports Conference, 21 May 2001, Montreal, Quebec

Ladies and gentlemen,

It is my great pleasure to be here with you today, to have the opportunity to address this distinguished gathering of experts from around the world. Canada - and Canadian ports - are honoured to host this important event.

Montreal is a fitting venue, given its important role as a transportation hub. It's also a centre for the industry, home to headquarters of international organizations and national companies, and, of course, the Port of Montreal. There is a rich culture and heritage to experience in Montreal, and I am sure you will enjoy your time here.

I would like to begin by thanking Mr. Dominic Taddeo for his leadership during the last two years as President of the International Association of Ports and Harbours. He is a great ambassador of the Canadian port community, and I want him to know how much we appreciate his contribution.

The work of the association is important because ports - and indeed, our entire marine transportation system - are a vital part of the global economy. Hundreds of years ago, trading ships - and the ports where they loaded and unloaded their goods - were the precursors of international trade. And that role continues today, with countless tonnes of goods being shipped by sea among nations around the world.

Marine trade has had no less of an impact here in Canada - especially with our strategic location between two oceans. Our ports have gone through a number of changes during the last few years - changes that have been extremely successful. Today, I want to share that success story with you, and also discuss some of the challenges we see for the future.

In 1995, the Government of Canada knew it had to take action to modernize Canada's marine management and regulatory regime. After extensive consultations with shippers, carriers and other stakeholders, we set out new directions for many of Canada's key marine institutions and facilities under the Canada Marine Act. Nineteen major ports in Canada's national ports system are now commercialized. They were removed from direct government funding and control and became entities known as Canada Port Authorities. They are managed by boards of directors that include local representatives and users, and they have full legal and fiduciary responsibilities.

This has given our ports the autonomy, flexi-



bility and tools they need to operate commercially and efficiently. The changes created an environment that makes it easier to reduce overhead costs and allow for faster business decisions. Decisions which are critical to remaining competitive in the maritime transportation sector. And we're seeing the benefits.

For an example, you need look no further than here in this city. The Montreal Port Authority, under the leadership of its President and Chief Executive Officer, Dominic Taddeo, has done very well under the new system - indeed, it is a world-class facility. In 2000, the Port broke the one million mark for "twenty-foot equivalent units" - one of only 12 ports in North America to have done so. And it is making major investments in its container facilities to build on this achievement.

The Port of Montreal has a lot going for it. It enjoys a healthy financial position. It has top-notch infrastructure. And it has a highly experienced workforce that can handle every type of cargo. Just as important, it operates its own rail network, with more than 100 kilometres of track, and has the added benefit of direct port-side access to the rail yards of both of Canada's national rail carriers.

This gives Montreal a significant competitive advantage over most other ports in eastern North America. About 60 per cent of the containerized traffic that moves through the Port is carried further inland by rail. And Montreal's strategic location means that goods can get to the American Midwest faster than through any port on the Atlantic coast.

These rail connections are key. Ports don't operate alone. To succeed, they need to build strong intermodal links - whether road or rail - to carry goods in and out of the port.

In today's global economy, a port's ability to compete is directly linked to the strength of the intermodal partnerships it can establish with reliable and competitive partners. And conversely, the health of our trucking and railway industries is highly dependent on the competitive position of our ports.

We see great examples of intermodalism working at ports all across Canada. The ports of Halifax and Vancouver - on opposite ends of the country - each boasts excellent rail links. With enhancements to its rail connections, the Halifax Port Authority, under the leadership of its Chair, Merv Russell, saw container cargo to and from

the U.S. Midwest increase by almost 30 per cent last year. And the Vancouver Port Authority, under the leadership of its Chair David Stowe, administers this country's busiest port, handling more than 70 million tonnes of cargo each year in trade with over 90 nations.

Thanks to the new regime the government has put in place - and to the strong leadership of the industry - our ports are growing. But this growth brings its own pressures and challenges.

For example, the Port of Vancouver is expected to reach its capacity by 2005 - and so work is underway now to look at how to handle future growth, especially in terms of new container facilities. It's the same story in Halifax. And Montreal also has a master plan with options for expansion.

And the challenge of growth is not limited to the amount of cargo a port handles. Ships themselves are growing - some are becoming so large in size that only certain ports can receive them. I know this is a challenge shared by many of you. And it is a particular concern for ports that have natural limitations.

The fact is, geography does favour some ports. But while you can't change your geography, you can change your business approach and build on your strengths. Each port can carve out its own niche and market its strengths - whether that's a deep harbour, strategic location, or intermodal connections - so that it can pursue opportunities for growth.

I'm very proud of our new national ports system, and of the successes we are seeing in our ports. But we must not become complacent. There are many challenges still to be addressed.

One of the key challenges for ports and shipping as well as for other transport sectors, are the ongoing changes in technology. E-commerce and intelligent transportation systems - ITS - are becoming increasingly important to the way we do business. Electronic port manifests and automated clearance and tracking of documents will play an even greater role as challenges of international compatibility and harmonization are addressed. We need to make sure Canada's technology can understand and talk to the technology from China, Egypt, Britain, or any other country. Canada and the United States are working together to address ITS challenges for surface border crossings. But given the international scope involved in marine shipping, resolution will be complex.

With new and changing technology comes the challenge all ports are facing in providing personnel with the appropriate training and experience. Here in Canada, there is a question of who is responsible for ensuring that people involved with ship-port interface are properly trained. It's an issue we need to address, and I'm sure that many of you have similar challenges.

With any mode of transportation, safety is always a key concern. And it is no less so with ports and shipping.

The Government of Canada has signed an agreement with five major international ship clas-

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sification societies, allowing them to certify shipping companies and vessels under the International Safety Management Code. This will help maintain our strict international safety standards for shipping.

Substandard shipping is a key safety issue. For we are dealing not only with lives, but also with environmental impacts. Canada, along with many countries, has seen the need to tighten the net on substandard shipping through port state control. Canada signed the Paris and Tokyo memoranda of understanding to establish regional systems for the inspection of foreign ships. In that way, we can ensure that foreign flag vessels entering our waters are in compliance with strict safety and anti-pollution standards.

Along with our fellow signatories, Canada wants to detect substandard shipping and minimize the threat that it poses to life, property and the marine environment. We will continue to act on all necessary fronts to develop international solutions to this pressing problem.

A major issue for you, especially in financial terms, is having ships detained on your wharves because of their poor condition. But the costs of sending out unsafe ships could be even greater.

I believe there will be increasing pressure on ports, shipping companies and governments to ensure that systems are in place that ensure that cargo is safe before it leaves a port - and to ensure that it is what it purports to be.

Addressing safety and environmental concerns is part of our effort to make Canadian ports internationally competitive. They are an integral part of our overall competitiveness strategy. That's because the 21st century will see the costs of environmental degradation factored into the costs of goods and services. We want to take steps now to make our industries more competitive, as well as protect our countries and our citizens from environmental damage.

I have been concentrating for the most part on Canadian ports and our experiences, but I suspect these challenges and successes are ones you face in your own countries. I understand that most of you are undertaking some form of commercialization. Here in Canada, we've come up with a unique balance that is certainly working to meet the needs of our ports - and their clients.

I know that a number of countries have looked to Canada as an example - but we can also learn from the successes elsewhere in the world. That's why conferences such as this are so important. It's a chance for you, the experts, to discuss challenges, changes and new developments, and to exchange ideas and best practices.

And so, I trust that your discussions throughout the week ahead will be interesting and fruitful. I've raised a number of issues here - issues that I hope you will find useful in your discussions. And I challenge you to continue your efforts - as will the Government of Canada - to ensure the future safety and vitality of this sector.

Thank you.

Proceedings of the 22nd IAPH World Ports Conference

Part 1



2001, A Maritime Odyssey was the theme of the 22nd World Ports Conference hosted by the Port of Montreal. The theme was explored in an epic business program, which comprised one keynote address, six keynote speeches, and twenty-nine papers spread over seven working sessions. An Overview of the Conference was given in Ports & Harbors (June 2001). Here IAPH's Special Reporter, Professor Peter Rimmer of the Australian National University, provides a set of keywords and abstracts the speeches and papers to give a deeper insight into the critical issues discussed at the Conference. These Proceedings are divided into two. Part I, comprising the keynote address, the first three keynote speeches and the papers delivered in the first three working sessions, is published here. Part II, covering three further keynote speeches and the papers delivered at the last four working sessions, will be published in Ports & Harbors (September 2001). The full Proceedings are also available on IAPH's website.

Keywords: Automated Identification System (AIS), Customer Relationship Management (CRM), E-Business (EB), E-Commerce (EC), Geographical Information Systems (GIS), Information Management (IM), Intelligent Transportation Systems (ITS), Intermodalism, Logistics, Ocean Side Rail Access (OSRA), Port Competition, Supply Chain Management (SCM).

BUSINESS PROGRAM

OPENING CEREMONY

Keynote Address

CANADA AND THE CHALLENGE OF THE WORLD ECONOMY

The Honourable David M. Collette, P.C., M.P.

Minister of Transport, Government of Canada

MARITIME trade in Canada has had an important impact on economic development because of the country's strategic location between two oceans. Since 1995 the Government of Canada has sought to modernize the maritime sector and regulatory regime. After discussions with shippers, carriers and other stakeholders the Government embodied its new directions in the Canada Marine Act. The mandates of nineteen major ports have been commercialized to give them the autonomy, flexibility and tools to operate efficiently independently of the Government in an era of deregulation and privatization. These ports include the Port of Montreal, which is in a healthy financial position. In 2000 the Port handled more than one million TEUs and operates its own rail network with direct portside access to

the railyards of Canada's national rail carriers. Some 60% of containerized traffic through the port is carried inland by rail. Given Montreal's strategic location, goods destined for the American Midwest can get there faster than from any port on the Atlantic Coast. This example of intermodalism is evident at ports across Canada. These include both Halifax and Vancouver, located at different ends of the country, which also have key rail links. Vancouver (the country's largest port), Montreal and Halifax have plans to expand their container facilities. Besides the increasing size of ships and geographical limitations on port growth there are other challenges to be addressed. These include the facilitation of e-commerce, especially for electronic port manifests, automated clearance and tracking of documents, and intelligent transport systems (ITS), particularly for surface crossings between Canada and the U.S. Canada has also been active in tightening the net on substandard shipping through port state control. The Government has signed both the Paris and Tokyo memorandums of understanding to establish a regional system for the inspection of foreign ships. This ensures that foreign flag ships entering Canadian waters comply with strict safety and anti-pollution standards.

22ND IAPH WORLD PORTS CONFERENCE

Working Session No. 1

THE WORLD ECONOMY AT THE DAWN OF THE THIRD MILLENNIUM

Emerging Developments in International Trade and Logistics and their Implications for the Port Industry

James R. Brennan
Partner, Norbridge Inc.

BETWEEN 1994 and 2000 there has been consistent growth across all trades with containers leading the break-bulk, dry-bulk, liquid-bulk in rate of growth. A more modest outlook for future growth is forecast between 2000-2010, but containers will still grow faster than the bulk trades. Changes in logistics will stem from shrinking delivery times, near perfect information, more precise levels of market segmentation, and the adoption of demand and time-based business model. Since 1990 a paradox may be emerging between the demand for and supply of container shipping. On the demand side time-to-market is a key competitive driver and shipment velocity may be the most important source of value. The supply-side response has been a relentless pursuit of scale economies (i.e. bigger ships); adoption of pendulum routes; 15,000-20,000 TEU equatorial deployments and 36 hours (or less) to discharge and load. This raises the question: what does a 24/7/365 global market mean to container shipping service frequency and vessel size? Clues to likely developments can be derived from an examination of the demand-supply paradigms, which show that the average size of the five largest oil tankers and dry bulk ships built between 1970 and 2000 have declined from their peak and stabilized. Will this happen to container shipping? If the world's container operators consolidated into 3-4 consortia to deploy 7,500 TEU ships, four strings could serve the entire transatlantic trade in 2020. If ship size increased to 10,000 TEUs only three strings would be required! The economic gains from bigger ships are potentially substantial for container and multipurpose terminals. Consequently, port managers need to understand the real needs of the market and their customers, to thoroughly assess and evaluate all options, know their bottom line, and have a contingency plan.

Global Currency Rates and Interest Rates Outlook

Karim Basta
Director of Global Debt Strategy,
Merrill Lynch & Co. Inc.

THIS study assesses hard/soft-landing risks inherent in the current period of economic weakness. There are ample policy tools — monetary and fiscal — to buffer against this trend. The key risk is an over-reliance on monetary policy. 2001 is cyclical and not a re-run of developments in Japan in 1998 — the U.S. has a different age structure and is more “creditized.” Except for Japan, government finances of all G-7 economies are in a good position. The US\$ continued strength is due to broad-based capital flows. The Bank of Canada and the European Central Bank will continue to lag rate changes by the U.S. ‘Fed’ in an attempt to boost their “undervalued” currencies. Japanese short-term interests are anchored at zero-curve, which will become steeper in any sell-off. Headwinds in the United States include downgrades outpacing upgrades 2:1 despite 5% GDP growth, tightening



lending standards, rising default rates, and non-performing loans. Shrinking profit margins, jumping electricity prices and an increase in the jobless have compounded these trends. An examination of the flow of fund analysis covering the demand for US\$ fixed income assets shows that the US\$ is benefiting from its mature markets and high rates compared with Japan and Europe. A complementary analysis of the supply for US\$ fixed income assets highlights that the sharp decline in the U.S. will continue in 2001 despite concerns over slower growth and changes in fiscal policy. The U.S. government should cut taxes now and risk over-reliance on fiscal policy. The implications of curves for global markets suggest the U.S. will out-perform non-U.S. markets because of a more aggressive and progressive central bank, mortgage convexity buying, debt management issues, and structure of ownership. The weakness of the Canadian dollar is not structural but due to opportunistic capital flows overseas. While a stronger Euro would offset short-term interest rates in “Euroland” it will not be immune from current trends in the U.S. Japan Inc. is still resisting restructuring while the value of corporate bankruptcies has increased sharply and investors remain risk averse.

Outlook for the Global Economy

Robert Fairholm
Chief Canadian Economist,
Standard & Poor's, DRI

WHAT if the U.S. goes into recession, Europe is not a locomotive, and Japan falters, Asia relapses and Argentina defaults/devalues? World growth has decelerated since 1995 and will slow in most regions during 2001. Growth of the U.S. economy has subsided, unemployment is rising, and cuts by the Federal reserve have not eliminated excess capacity, offset weaker stock prices, made Internet retailers profitable, reduced telecommunications debt on fixed charges, and boosted automotive sales. A recession will occur if consumer confidence collapses, the stock market crashes and Japan lapses into recession. This will have a negative impact on countries exporting to the U.S., particularly those shipping IT equipment. The manufacturing downturn has spread to



Canada but a recession is unlikely due to tax cuts and real GDP growth stemming from energy developments. The impact of slowdown on Europe's relatively closed economy could affect the profits of firms with major American investments and dampen consumer and business confidence, but a surge in the value of the Euro against the US\$ is unlikely. As Japan's economy is slowing and its zero interest rate policy has been ineffective in combating deflation, a second lost decade is likely as corporate restructuring has been slow and political leadership non-existent. Asia is likely to be adversely affected by any slowdown because its U.S. market is more important than that of Japan and, except for China, the slack will be picked up by domestic demand. In Latin America lower interest rates will afford some relief to Mexico but Argentina may have to default and/or devalue. The risk of a recession in the U.S. is uncomfortably high (rated at 40%) and the rest of the world is unlikely to provide a lifeline. Although the period of the high-tech shakeout is difficult to gauge, there is more room for fiscal and monetary stimulus in the U.S. and Europe.

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Vision 2020 - The Port Industry

Datuk G. Gnanalingam

Executive Chairman
Kelang Multi Terminal Sdn Bhd

A review of developments in the world's container industry between 1980 and 2000 highlights the extent to which changes can occur in twenty years. Over the period, there were marked changes in world container port rankings including the spectacular rise of Shanghai. Significant shifts occurred among the top-10 positions of container liner shipping companies presaging the emergence of Maersk Sealand as No. 1. The size of the largest container vessels rose from 2,500 TEUs in 1980 to 6,500 TEUs in 2000. Throughput of the largest container port increased from 1.9 million TEUs in 1980 (New York) to 17.8 million TEUs in 2000 (Hong Kong). Container port throughput worldwide increased from 37.1 million TEUs in 1980 to an estimated 190 million TEUs in 2000. Yet, freight charges declined by 60%. In painting a picture of the 2020 port it is assumed that container throughput will have trebled or quadrupled (estimates for 2010 are 400 million TEUs). Ten per cent of container ships will have capacities in excess of 15,000 TEUs; another 30% will be between 8,000 and 15,000 TEUs, 30% between 5,000 and 8,000 TEUs and the remaining 30% under 5,000 TEUs. Among the top-ten ports will be Shanghai and representatives from South Asia, Middle East (Iran), Europe (North Sea), Mediterranean (Gioia Tauro), North America (Montreal) and Southeast Asia (Port Klang). There will be further alliances and slot sharing. Ninety per cent of world cargo will be handled by 30% of shipping lines. Hutchison, P&O, PSA and Maersk Sealand will be the top brand names handling 50 per cent of the containers. Information technology, notably electronic data interchange (EDI), e-commerce and digitalization, will drive all port activities. In the process ports will be transformed from blue collar to white collar employees. Their "junkyard" appearance will be replaced by a garden image. Increasingly, ports will become like airports in discipline by adopting the pre-stowing of cargo and scheduled transit times. Ships will spend more time at sea than in port. Crane productivity will be increased to boost the number of containers handled per hour. Currently, all is not well with port activi-



ties due to shipping delays and lack of inventory control, which occasions invisible losses. There is need to adopt an airport-like model for the port of 2020.

First Keynote Speaker

WHAT'S GOING TO HAPPEN IN THE CONTAINER SHIPPING INDUSTRY?

Ray Miles

Chief Executive Officer, CP Ships

THE global container industry has proved both a facilitator of world trade through intermodalism and an engine of growth by lowering the costs of transport. Containers are now the fastest-growing segment of international shipping buoyed by further technological innovations and productivity gains. However, the industry could be put to the test over the next few years due to a big increase in the capacity of container vessels. Until 1999 most shippers — though not CP Ships — fared poorly financially, particularly due to the Asian Crisis of 1997-98. Since then increases in freight rates, industry consolidation, and an increased willingness among shipping companies to work together have all combined to boost profits for most carriers. With the world economy slowing down and the capacity of shipping lines slated to increase, companies are going to have to continue consolidating and working together. Discipline will be further enhanced if more shipping companies listed on the stock exchange — like CP Ships on the Toronto and New York Stock Exchanges — because they will have to answer to their shareholders. CP Ships will continue to use its homeport of Montreal as an important gateway. Canada Maritime owned by CP Ships and Overseas Orient Container Line (OOCL) will invest US\$150-million on three new ships to be introduced in 2003. These will be the largest vessels ever deployed on the St Lawrence River. Although nominally able to carry 4,100 TEUs, the fluctuating draft of the St Lawrence is expected to reduce their load to 3,000 TEUs. This is the third batch of new ships launched by Canadian Maritime — three were launched in 1996 and able to carry 2,200 TEUs and three in 1998 with a capacity of 2,800 TEUs. The resultant new business from the new ships had exceeded the company's expectations as the extra capacity was filled within two years.



Second Keynote Speaker

A BOLD VISION OF BORDERLESS TRADE

Rob Ritchie

President and Chief Executive Officer,
Canadian Pacific Railway

THERE is a pressing need to counter protests against globalization and revitalize a shared vision of borderless world trade by demonstrating that it does not necessarily mean prosperity for some countries and poverty for others but a "win-win" situation for all. In realizing this grand vision there would be support for the comparative advantage of each country by creating and sustaining the lowest-cost, most seamless means of moving and distributing imports and exports, safely and with regard for the environment. Physical goods would travel unhindered like information and capital. A transport web — not unlike the Internet — would be connected together by a true network of partners — ports, railways, truck and marine carriers — working together to make the delivery of physical goods seamless. An alliance between the public and private sectors would round off this vision. In moving towards this vision a series of barriers must be removed. Paperwork barriers stemming from overly complex and competing requirements of Canadian and U.S. customs officials cause delays and add between 5-7 per cent to the final cost of transport (border congestion alone in North America costs US\$8 million per minute!). Crime barriers involving the inflow of illicit drugs and illegal immigrants are also impeding the free flow of trade and undermining the competitiveness of a country's goods. Regulatory barriers between countries, states and provinces — often flawed with unclear and unenforceable rules — diminish competitiveness and undermine the strength of trading nations. Public policy barriers inhibit investment in infrastructure and, through the use of subsidies, penalize some carriers at the expense of others. Collectively, these barriers undermine the comparative advantage of nations. Borderless trade will remain out of reach until they are removed. Their removal would benefit firms such as Canadian Pacific Railway (CPR) as 30 per cent of its traffic — 700,000 loads per year — crosses the Canadian-US border.



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Working Session No. 2

PORT INDUSTRY REALITIES AND NEW CHALLENGES

Land Side Access to Ports

T.F. Hau

Senior Vice-President Operations,
North America OOCL (USA) Inc.

INNER shipping has been transformed from a port-to-port to a point-to-point operation by containerization, inter-modalism, alliance formation, technological development and supply-chain requirements. Shipping lines are responding to customer needs by introducing shuttle services and direct ports of call to minimize transit time, alliances and larger ships to cut rates and costs, inter- and multi-modal services to limit hand-offs, and information technology to improve customer services. Of critical importance in port selection is the customer's land side access to terminal facilities. This includes ocean-side rail access (OSRA), which involves choosing between common carriers and contracted carriers, the most-efficient routes and a yield-driven marketing strategy. Terminal capacity will be determined by the alliance make-up, land availability to accommodate anticipated future trade growth, choice between wheel or ground operations, labor and technology applications, and the nature of dock/rail transfers. On-dock rail offers high cost solutions for accelerated growth situations but reduce road traffic and chassis utilization. Although there is no excessive rail terminal capacity, capital investment has been slow making all-water operations more attractive. Underpaid owner-operators, overcrowded highways and limited off-dock storage have bedeviled truck and highway operation. Night terminal operation, saturated transport systems, port expansion, more dredging and rail terminal development have had negative environmental impacts. Three successful models have been identified — Asian (sea feeder), Europe (truck feeder) and North American (railroad system). An elaboration of the North American model highlights the importance of good intermodal infrastructure, load center location and deep water. Any search for improved land-access has to accommodate trade growth, larger ships, the shortage of terminal/rail capacity, the high demand on



inland access infrastructure, and public concerns about truck growth. Winning ports will offer quality land access infrastructure (harbors, terminals and rail) and overall cost efficiency derived from the shipping, port and land transport equation.

Logistics and Distributions – Requirements for a Seamless Partnership of Shipping Lines, Ports and Inland Carriers

Tracy R. Flaggs

Global Transportation Purchasing Manager,
Ford Motor Company

THE top-ten characteristics of consumer-focused companies are total consumer experience, product hits, consumer loyalty, retailing and distribution, brand process, logistics, build to demand, consumer knowledge system, e-commerce, and growth. Of these three are pertinent to world ports: logistics; build to demand (flexibility and responsiveness of manufacturers and suppliers to build what the customers want, when they want it); and e-commerce (interacting, distributing and selling on-line). Logistics — creating efficiencies in procurement and distribution that results in benefits to consumers — is most critical. This has led the Ford Motor Company to develop a global logistics strategy with a mission to develop, design and implement and continuously improve a global multi-modal logistics network that enables Ford Motor Company to become a world class consumer pull company. The scope of this strategy includes the entire supply chain from tier-x supplier to the consumer on a phased implementation basis. This task involves both dedicated Ford personnel and partnerships with “expert” partners. The metrics for judging its efficiency and effectiveness are speed, quality of service and total cost. In future, companies will not compete against each other. Instead their supply chain and order fulfillment system will compete. Success will belong to the best value-chain constellations. Thus the Company requires shipping lines, ports and inland carriers to be seamless solution providers. Specifically, port operations need to be environmentally safe, involve safe practices in the harbors, offer longer hours with window time slots for pick up and deliveries, encourage collaboration between carrier and ports to improve productivity of lifts,



and identify and eliminate port waste. Also they need to supply connections to road and rail so that cargo can be moved quickly, space for expansion to meet global requirements, flexibility in port planning, and visibility and accountability. The key ingredients for success will be performance driven results, high velocity turnaround, flawless execution discipline, improved links between tier x supplier and the consumer, and the availability of information technology.

How E-Business Will Improve the Interface between Ports, Shippers and Customers?

Gregory L. Smith

Global Segment Executive,
Freight and Logistics,
IBM

E-business is about transforming key business processes with Internet technologies. Critical areas for freight and logistics are supply chain management (SCM), enterprise asset management (EAM), and customer relationship management (CRM). E-business technology extends, integrates and enables business processes focused on SCM, EAM and CRM by using a comprehensive business strategy covering e-business, creativity (marketing) and technical architecture. E-business is leveraged using market analysis, customer requirements and relationships, competition, partnerships, brand and image, business re-invention and e-commerce globalization. Marketing is enhanced through brand representation, information relevancy (one-to-one marketing), and information collection and management. Technology is used to integrate existing infrastructure, such as order management, electronic data interchange and inventory management, and the physical and virtual building blocks, notably Web tools, catalog engine, E-bill presentation and payment, database server and pervasive computing technologies (e.g. optical character recognition). Many process benefits stem from adopting an e-business strategy including decreased management costs, increased productivity of teams, greater incremental revenue from improving speed-to-market, and reduced defects. Also organizational benefits range from employee retention to increased employee morale and awareness of new opportunities. Adoption of e-procurement provides for the re-engineering of the traditional internal process, tools for the reduction of prices/costs, and the

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strategic sourcing of services. The purchasing time is reduced from weeks to one day, contract time from 30 days to 30 minutes, contracts from 20 pages to 6 pages, maverick buying from 75% to less than 2%, and internal satisfaction from 70% to more than 85%. A total saving of US\$4.2 billion on sales of US\$21 billion was reported from substituting Web-based for traditional procurement methods in 2000. Information requirements satisfied by IBM's e-business model include track and trace, cost controls and analysis, SCM (stocks-on-hand and in pipeline, raw material availability, transportation monitoring and manpower) and integration with internal EAM system and internal and external CRM systems.

Third Keynote Speaker

INTERNATIONAL ENVIRONMENTAL SAFETY MEASURES - THE IMPORTANCE OF THEIR APPLICATION ON THE WORLD'S WATERS

William A. O'Neil

Secretary General,
International Maritime Organization

THE efficiency of port operations is critical to maintaining sea transportation in its primary position as the most economic, secure and environmentally friendly method of moving goods globally. As this is particularly significant for ports in developing countries the International Maritime Organization (IMO) has developed a number of port-related training programs both at the World Maritime University and, with the private sector, at the Port of Le Havre. Also IMO has assisted many ports in developing countries to provide proper reception facilities of waste generated on board ships. This agenda reflects IMO's emphasis on safety and efficiency. IMO has developed standardized documentation forms and pioneered the efficient use of information technology to ease the administrative burden in relations between ships and ports. However, IMO's fundamental focus is on the safe movement of vessels and their cargoes through ports. Correct marking of navigation channels with updated charts and professional pilotage services are essential. Sections of the IMDG code covering the designation, packing and



stowage of hazardous cargo — adopted by IMO in 1965 — will be mandatory from 2004. As pinch points in the transport system ports are particularly vulnerable. Concern for the port environment and its risk potential led to IMO intervening in the debate over "ports of refuge" stirred by the disabling of the tanker *Castor* in the Mediterranean Sea. The ship was forced to remain under tow in open seas for more than a month while salvors sought a safe place — not a port — to undertake lightering. IMO's position is that it is unacceptable that there are no guidelines governing a distressed ship. The requirement should be to find it sheltered water where the situation can be stabilized. The concern of port authorities that they should not be exposed to the risks of pollution, fire or explosion is not challenged. However, the situation in which a damaged vessel with a potentially hazardous cargo has nowhere to go cannot be permitted.

Working Session No. 3

PRODUCTIVITY AND COMPETITIVENESS IN A GLOBAL MARKET

Globalization and Partnership in Ports - Trends and the Role of the World Bank

Marc H. Juhel

Senior Port Specialist, The World Bank

FIVE forces are shaping the competitive landscape of ports. Firstly, rivalry within and between ports is being determined by hinterland market access, the ability to service the transshipment trade, regional port capacity and demand, ability to create competition within the port, stakes at risk, ability to absorb losses and limits on rivalry within ports. Second, the threat of new competitors arising from new port facilities or service providers will vary depending upon capital expenditure for new port facilities, new distribution patterns, natural barriers, magnitude of switching costs and cost advantages and customer loyalties. Third, the potential for global substitutes will be determined by availability of other global sources for products moving through the port, substitute products for exports and imports, magnitude of switching costs for substitution, demand elasticity of exports and imports, and importance of port costs in the total delivered price. Fourth, the bar-



gaining power of port users will be dependent on the concentration of port user power, impact of changing business relationships presence of large value adding tenants, importance of port to the economy, ability to replicate port services, and facility investments by port users. Finally, the bargaining power of port services providers will be resolved by the experience and capabilities of service provider, participation of facility financing, ability to absorb downtime, and rights and obligations conveyed by contractual agreements. Further, port dynamics in the 21st century will be affected by radical changes in the underlying business base due to the impact of globalization on ports, shifting bargaining power, consolidation among ocean carriers, the emergence of global terminal operators, and the emergence of global logistics providers (e.g. Federal Express). Among the challenges are opportunities for the private sector in container terminal operations, tug assist services, maintenance dredging, information technology, environmental facilities, and ship safety and other port services. Further, ports can adopt a competitive stance by using build-own-operate-transfer concessions. Also it is important to optimize the throughput of existing facilities in developing countries. To meet this challenge the World Bank has launched the Global Facilitation Partnership for Transportation and Trade in 1999, which includes IAPH as a member.

Globalization of Trade and its Impact on the Cargo-Handling Industry

Madelaine Paquin

President-Chief Executive Officer,
Logistec Corporation

LOGISTEC — with revenue of some C\$180 million — focuses on stevedoring and terminal operations. has a diversified cargo base and growing geographical network of 30 terminals in 27 ports in North America. This base has been affected by the double-digit growth in overseas trade between 1990 and 2000. The company's core activities have been influenced by the globalization and consolidation in its customer's industries, notably forest products, base metals, automobiles, chemicals, food distribution, etc. (e.g. Bowater's C\$1.2 billion purchase of Alliance Forest Products). In



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turn, this drive to reduce costs has led to globalization and consolidation among carriers in both container and non-container business (e.g. Maersk Sealand and Wallenius Wilhelmsen Lines). Response by the stevedoring and terminal industry to these bigger and fewer players demanding "more-for-less" has been to consolidate their activities to meet the increased capital needs stemming from the demand for specialized ship-side services (e.g. P&O Ports, Hutchison Port Holdings and PSA of Singapore). This progress has occurred outside the U.S. where governments have provided subsidies, bonds or direct management and reduced private sector involvement. As the availability of public money is increasingly difficult an expansion of privatization is anticipated as illustrated by Logistec, private company involvement. Increased containerization will add pres-

sure to decrease costs in the non-containerized sector. If this market is to be served efficiently and realistically in the long-term there will be an increased need for outsourcing and alliances and partnerships between the public and private sectors. Terminals will be specialized by product and sufficiently flexible to deal with cyclical industries. There will be a consolidation of the port service industry with provision for value-added services (e.g. cargo tracking), integrated logistics systems and increased involvement of private companies. Also there is an increased need for partnerships, seamless service providers, and innovative labor relations. The key success factors for productivity and competitiveness in the stevedoring and terminal industry involve choosing the most talented people, deepening relationships with customers, and access to capital markets.

Charting New Waterfronts: Non-Traditional Approaches to Waterfront Development

Philip A. Crannell Jr. AIA
Chairman, Gee & Jenson

PORTS need to diversify their options from cargo handling to cruise terminals, mixed use terminals, waterfront-based entertainment/retail centers, and support services to maximize their land assets. The cruise industry provides a catalyst because US\$12 million has been invested in new ships between 2001 and 2004. With 38 new ships there is an opportunity for the geographical dispersion of homeports and routes. Newbuildings of cruise ships are getting larger and there is scope for building different types of facilities to accommodate them. These could include stand-alone terminals, dual-purpose terminals, cargo-cruise facilities, and elaborate mixed-use waterfront complexes. Cruise terminals could also be put to other uses such as banquets and convention facilities, and the accommodation of day/gaming vessels and passenger/vehicle ferries. One port call by a Fantasy class ship with 2400 passengers is equivalent to the arrival of 13 aircraft. Fifty visits could generate an annual estimated income of US\$1.5 million from passengers and parking. Costs for cruise terminal construction range from US\$2 million for an interim facility handling ships up to 1,000 passengers, US\$18.4 million for a larger terminal for ships with up to 3,000 passengers, and US\$45 million for Port Canaveral's Eagle class terminal. In comparison a basic container terminal would cost US\$50-75 million. There is also scope for (1) conventional mixed-use development such as Corpus Christi's Harbor Island; (2) retail, commercial and residential complex; urban waterfront centers typified by Port Canaveral's master plan for retail, food and beverage and commercial development; and (3) urban waterfront entertainment centers illustrated by Chicago's Navy Pier. Also there are other new avenues through which ports can diversify and enhance revenue streams. For example, the Port of Shreveport-Bossier is the site of Louisiana's on-site power plant; Alaska is selling utilities to cruise ships and Port Manatee is Florida's staging site for a natural gas pipeline. Thus, the progressive port of the future may look very different from the port of the past.



Port Community Extranet for Enhanced Terminal Management

Ernst Radloff M.Sc. Eng

Senior Development Officer –
Transportation Systems, Transport Canada

The transportation and logistics environment has been transformed by increased container traffic, improved intermodal connections, greater throughput and faster turnaround, adoption of e-commerce (EC) and intelligent transportation system (ITS) applications. These permit optimal service levels to end consumers and just-in-time delivery. Port stakeholders require timely and accurate information flow, better processing of import/export documentation, improved gate operations to reduce congestion and minimize delays in cargo handling, and integrated vessel, rail, gate and yard operations management. Current business processes are characterized by limited use of computer-to-computer communications, heavy reliance on telephone and fax, limited-to-no sharing of key information, heavy reliance on "informal people networks," and limited use of information technology among stakeholders. As this results in dispatchers chasing down the status of containers and issuing delivery orders, inaccurate information is passed to drivers occasioning gate congestion. A port community Extranet can resolve these problems. Extranet's goal is to provide infor-



mation on containers to stakeholders, including secured and flexible global access and alerts, flexible data exchange, controlled information dissemination and near real time updates and display. Also supplied is an ability to hold information, data based on containers and truckers, and 24hour/7day-information availability and monitoring. The benefits of Extranet cover improved information flow and data dissemination, reduced congestion and increased productivity, improved container tracking and visibility and fewer delays at the terminal gate and better security. Also included are global access, easy connection, and lower communications costs, timely information and fewer data entry errors, and better service to members. EC and ITS applications at the port include Internet-based communications enabling EC via the Extranet (e.g. e-billing and payment), Extranet integration with the terminal management system, and real-time update of the Extranet via the traffic management system. There is provision for integrated vessel, rail, gate and yard management and gate automation system with ITS technology, auto clearance of trucks, increased security, and less paperwork. Future visions extend to interoperability and convergence of EC and ITS, the use of ITS systems for identification and tracking integrated with terminal planning systems, and integration with advanced technology (e.g. DGPS, G3 etc.). There will also be Extranet sharing data for Web-based container tracking and tracing through the supply chain, and an Internet transport medium linking ports and trading partners.

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THE 22nd IAPH World Ports Conference was held at the Queen Elizabeth Hotel, Montreal, Quebec, Canada from 19 to 25 May 2001, being hosted by Montreal Port Authority. Mr. Dominic J. Taddeo, President and CEO of the Port, and IAPH President, acted as the Conference Chairman. The number of participants amounted to more than 800 from 60-some different countries and economies.

Keynote Address and Keynote Speeches

Delegates and participants were honored by the presence of The Honorable David M. Collette, P.C., M.P., Minister of Transport of Canada, who kindly delivered us his Keynote Address on the subject of "Canada and the Challenge of the World Economy." (As reproduced in the previous page.)

On top of the Ministerial Keynote Address, during the whole course of the Conference inclusive of luncheon sessions, we enjoyed additional six keynote speeches by six speakers on varied subject areas as follows:

- **Mr. Rob Ritchie**
President and Chief Executive Officer,
Canadian Pacific Railway
On the subject of "A Bold Vision of Borderless Trade"
- **The Honorable Martin Cauchon, P.C., M.P.**
Minister of National Revenue and Secretary of State responsible for
The Economic Development Agency of Canada for the Region of Quebec
On the subject of "Canadian Customs – An evolution of Partnerships"
- **Mr. Ray Mile, Chief Executive Officer, CP Ships**
On the subject of "What's Going to Happen

in the Container Shipping Industry?"

- **Mr. William A. O'Neil, Secretary General, International Maritime Organization (IMO)**

On the subject of "International Environmental Safety Measures – The Importance of their Application on the World's Waters"

- **Mr. Laurence G. Pathy, President, Fednav Limited**
On the subject of "The Great Lakes/St. Lawrence Waterway – From Vision to Reality"
- **The Honorable Jeff Radebe, Minister of Public Enterprises, South Africa**
On the subject of "African Renaissance and Port Development"

Working Sessions

Seven Working Sessions comprising highly indicative and informative presentations on assorted subject areas of prime importance for the future of world ports. Hereunder, this office notes with immense sense of appreciation to all speakers for their most informative presentation. (Notes: Working Sessions are summarized by an IAPH reporter and will be introduced in two parts through this journal.)

Session 1: Theme: *The World Economy at the Dawn of the Third Millennium*

In chair: **Mr. Dominic J. Taddeo**, IAPH President

Session 2: Theme: *Port Industry – Realities and New Challenges*

In chair: **Dr. Akio Someya**, IAPH First Vice President



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Session 3: Theme: *Productivity and Competitiveness in a Global Market*

In chair: **Mr. Pieter Strujis**,
2nd Vice President of IAPH

Session 4: Theme: *Ships to Ports – Inland Waterways in the 21st Century*

In chair: **Mr. H. Kornegay**, 3rd
Vice President of IAPH

Session 5: Theme: *Port Management – The Emerging Realities in Maritime Commerce Around the World*

In chair: **Mr. John Hayes**,
Sydney Ports Corporation,
Australia

Session 6: Theme: *Technological Innovations – Indispensable Tools for Success in the Maritime Industry*

In chair: **Datin Paduka O.C. Phang**,
Port Klang Authority,
Malaysia

Session 7: Theme: *New Responsibilities for Ports – A Real Challenge*

In chair: **Mr. Jean Smagghe**,
Immediate Past President of
IAPH

Notes: Montreal Port Authority, the Host, extensively posts the texts and the PPT (Power Point Texts) of the papers presented by 30-some speakers at Montreal Conference.

Montreal Port Authority Home Page is:
<http://www.port-montreal.com>
Needless to say, you can reach
Montreal via IAPH homepage as well.
Ours is: <http://www.iaphworldports.org>

Plenary Sessions, Board Meetings and Meetings of Various Committees

- **Plenary Sessions:** To consider the future direction of IAPH by and after hearing the activities during the past two years as conducted by various groups and committees of IAPH, there were the First Plenary Session on Monday (May 21) and Second Plenary Session on Friday (May 25).
- **Board Meetings:** Board met three times on (1) Sunday, May 20 as Pre-Conference Board Meeting, and Friday, May 25, (2) as Special Board Meeting for the site selection of 2005 Conference and in the same afternoon (3) Post-Conference Board Meeting, immediately following the Second Plenary Session. On top of these, on Wednesday (May 16), the three regional Board Meetings of the three regions of African/European, American and Asia/Oceania were organized respectively.
- **Exco Meeting:** Immediately following the Post-Conference Board Meeting, the Exco Meeting was organized to confirm the date of the October meeting in Auckland, New Zealand.
- **Other Meetings of Various Committees and Groups:** Meetings of 3 groups of Committees, IAPH/IMO Interface Group, and four Conference Committees were organized on Saturday, May 20 (10 separate meetings), and Sunday, May 21 (11 separate meetings) respectively.

Resolutions and Bills Committee (one of the four Conference Committees) met each morning. The number of such committee meetings amounted to nearly 30.

Main Issues at the Plenary Sessions and Board Meetings

Adaptation with the spirit of the IAPH 2000 recommendation at the Kuala Lumpur Conference 1999

- As a priority matter, the Board approved that every effort shall be made to complete the mission related to the updating of the By-Laws of the Association to make it more compatible with the materialization of the spirits of the IAPH 2000 initiative as adopted by the KL Conference in 1999.
- **Creation of the Advisory Council:** A special group of experts composed of the Chair of Legal Counselors, Chairs of the Finance Committee, Membership Committee, and the Long Range Planning/ Review Committee shall be formed to advise Officers and Exco as well as Board, but without voting rights, by attending regular or mid-term meeting or ad hoc meetings. It was agreed that Legal Counselors would take the lead of this task at the initial stage.



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Resolutions adopted

Resolution to Reaffirm the Conditions for IAPH Temporary Membership

WHEREAS, at a regular meeting held during the 22nd World Ports Conference of THE INTERNATIONAL ASSOCIATION OF PORTS AND HARBORS, the Secretariat hereby recommends to the Board of Directors to continue the Temporary Membership Scheme which has been in effect since 1980,

WHEREAS, said Temporary Membership Scheme has been a product of support of the Membership Committee and the Budget Committee during the past years since its inception,

WHEREAS, said Board of Directors at their Post-Conference Meeting held on the Twenty-Fifth day of May 2001 in Montreal, Canada, concurred with the Membership and Budget Committees,

NOW THEREFORE BE IT RESOLVED by the Board of Directors that the Temporary Membership Scheme shall be continued on the following conditions:

- (1) Temporary Membership may be granted to non-member ports for one period only as hereafter specified and may not be granted to previous Temporary Members.
- (2) Temporary Members shall be admitted to the Association for twelve (12) months from the date of their application or until the end of the Conference following the date of their application, whichever period is longer.
- (3) After expiration of one of the above-mentioned periods, Temporary Members shall either join the Association as Regular Member and fully comply with the Constitution and By-Laws of the Association, or their temporary membership having lapsed, shall cease to be

members of this Association.

- (4) Temporary Members shall pay membership dues of SDR600 at the time of submission of the application.
- (5) Temporary Members shall be privileged to receive all publications of the Association, as all Regular Members do.
- (6) Temporary Members shall be eligible to attend the 23rd Biennial Conference to be held in Durban in 2002, with the full privileges of Regular Members except the right to vote during the Conference.

Resolution on Creation of a Council of Advisors

WHEREAS the Executive Committee serves as the chief executive body of the Organization in the interim periods between Conferences; and

WHEREAS in the exercise of its responsibilities the Executive Committee has a need for and desires advice and counsel regarding the broad range of issues that it must deal with, and

WHEREAS it is in the interest of the Organization that the Executive Committee has available to it as a resource, the advice and recommendations of a Council of Advisors, **NOW THEREFORE BE IT RESOLVED** that on this 25th Day of May, 2001 there should be and hereby is created a Council of Advisors, and that said Council shall be comprised of the Council of Legal Advisors, the Chairman of the Finance Committee, the Chairman of the Long Range Planning and Review Committee and the Chairman of the Membership Committee and that said Council of Advisors shall meet with and provide advice and counsel to the Executive Committee as requested by the Chairman of the Executive Committee.



Resolution on Provision of Safe Havens

WHEREAS, as a result of recent incidents "safe havens" or ports of refuge have become a matter of international attention to, among others, the International Maritime Organization, and

WHEREAS, THE INTERNATIONAL ASSOCIATION OF PORTS AND HARBORS is aware that, in addition to Maritime Administrations, the international port community has a pivotal role in ensuring that assistance and facilities be provided under conditions of maritime distress, and

WHEREAS, there is a recognition that in discharging their responsibilities, ports must act on the basis of broad community responsibility directed at the safety of life at sea without however compromising the safety of the on-shore population, the need to mitigate environmental damage to the port as well as to coastal areas and as well as the certain operational and commercial needs of the port,

NOW THEREFORE, BE IT RESOLVED that coastal states be urged to review their contingency arrangements to provide adequate assistance and facilities to disabled ships, and

BE IT FURTHER RESOLVED that contingency arrangements be directed at the safety of life at sea without however compromising the safety of the on-shore population, the need to mitigate environmental damage to the port as well as to coastal areas and as well as



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certain operational and commercial needs of the port.

As adopted on May 25, 2001, at the Second Plenary Session on the occasion of the 22nd World Ports Conference

Resolution on Condolence

WHEREAS, the 22nd Conference of THE INTERNATIONAL ASSOCIATION OF PORTS AND HARBORS notes with sadness the passing of certain colleagues during the past two years since the 21st Conference of IAPH held in Kuala Lumpur in May 1999. They include Mr. Fred Gingell, Former Commissioner of Fraser River Harbour Commission, Former Chairman of the IAPH Finance Committee; Mr. Jack Bobby, former General Manager, Taranaki Harbours Board, New Zealand; and Mr. Ralph Latta, former Chairman, Westgate Transport Limited, Taranaki, New Zealand; Mr. George W. Altwater, former Executive Director of Port of Houston, and former IAPH President (1977/1979); Mr. Ben E. Nutter, Founder Honorary Member of IAPH; Mr. Toru Akiyama, Founder Honorary Member of IAPH, Secretary General of IAPH (1967-1973); the founder of the IAPH Foundation in Tokyo; and Miss Kimiko Takeda, Senior staff of the Head Office.

WHEREAS, said persons were sincere friends and staunch supporters of the Association, and

WHEREAS, the members of this Association desire to record and express their fond memories of the deceased colleagues and to pay tribute to their dedication to the common cause of the Association,

NOW, THEREFORE, BE IT RESOLVED that THE INTERNATIONAL ASSOCIATION OF PORTS AND HARBORS hereby declares to its deep sorrow upon their deaths and expresses its profound sense of loss,

IT IS FURTHER RESOLVED that the 22nd Conference of THE INTERNATIONAL ASSOCIATION OF PORTS AND HARBORS assembled at Montreal, Canada, from 19 -25 2001, adjourn for a moment of silent prayer in memory of the friendship and affection its members held for them.

Resolution on Expressing Appreciation

WHEREAS, the 22nd Conference of THE INTERNATIONAL ASSOCIATION OF PORTS AND HARBORS has been in all respects successful due to the won-

derful organization and execution of the business and social programs;

NOW THEREFORE BE IT RESOLVED that the 22nd Conference of THE INTERNATIONAL ASSOCIATION OF PORTS AND HARBORS assembled in Montreal, Canada, from 19 to 25 May 2001, should and hereby does extend its gratitude to the following:

Mr. Pierre Bourque, Mayer

Ville de Montreal

Mr. Bernard Landry

Premier Ministre du Quebec

Mr. Jean Chretien

Prime Minister, Ottawa

Mr. Raymond Lemay

C.M., Chairman of the Board, Montreal Port Authority

Dominic J. Taddeo

President & Chief Executive Officer, Montreal Port Authority; and

Members of the Conference Organizing Committee;

AND BE IT FURTHER RESOLVED that our thanks also go to the Chairmen, Speakers of the Working Sessions and other contributors to the Sessions, to the Sponsors, Exhibitors to the Trade Exhibition and the media for their respective contribution to the success and enjoyment of the Conference.

Our gratitude also goes to:

The Queen Elizabeth Hotel, and other designated hotels,

And those who in various capacities, including spouses, partners and accompanying persons for their support of the 22nd World Ports Conference of this Association. Without their dedicated services and help, the Conference would not have been such a success.

Advancement of Collaboration with PIANC

Equally important, I am attaching the text of the MOU exchanged at Montreal between IAPH and PIANC. As it will involve and affect various IAPH activity



areas, your kind attention is requested for the practical implementation of the spirits contained in the MOU.

Election of Honorary Members and Presidential Citation

At the recommendation of the Honorary Membership Committee, the following individuals of meritorious service to IAPH have been elected at the second plenary session as Honorary Members. President Taddeo awarded the newly elected Honorary Members with the Scroll of Honor. They were:



Keith Stuart



Lillian Borrone



Sir Keith Stuart,
Associated British Ports,
UK

Mrs. Lillian Borrone, the
Port Authority of New
York and New Jersey, USA

Mr. Alexander Krygsman, Port of
Stockton, USA



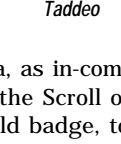
Alexander Krygsman

President Taddeo commended **Mr. Charles M. Rowland**, Canaveral Port Authority, by presenting the Plaque of Presidential Citation for his meritorious service to IAPH.

President Dominic Taddeo, as the out-going President of IAPH, was elected as Honorary Member. Dr. Akio Someya, as incoming President, presented the Scroll of Honor, together with a gold badge, to Mr. Taddeo.



Charles M. Rowland



Dominic J. Taddeo

The IAPH Information Technology Award 2001

IAPH IT Award was awarded to the following ports. IAPH IT Award is the project carried out by the Trade Facilitation Committee (Chair: Mr. Emili Arbos, Port of Barcelona). At the first plenary session, after a brief introduction by Mr. Santiago Mila, on behalf of Chairman Arbos, the plaque was handed over by President Taddeo to:

Gold Plaque

"Reporting on a project research into the application of Information"

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Technology in Ports and Maritime Transport"

Recipient/Winner: Administração dos Portos de Paranaguá e Antonina, Brazil

Silver Plaque

System Name: **"Port Information System"**

Recipient/Winner: Port of Brisbane Corporation, Australia

Bronze Plaque

System Name: **"Container and Booking Inquiry Using the Web"**

Recipient/Winner: Port of Houston Authority, Texas, USA

Funding for the IAPH Bursary Scheme

Committee on Human Resources Development, in its report to the Conference that was approved by the Board and Plenary, suggested that the funding campaign should be launched with a target of US\$70,000 following the identical canvassing approved in 1997 at the London Conference.

Future Calendar of IAPH

23rd IAPH World Ports Conference in 2003, Durban, South Africa

- Dates: 24 to 30 May 2003
- Venue: Durban International Conference Center, Durban, South Africa
- Conference Theme: Ports - The Catalyzing Impact - Emerging Economies Through World Ports"
- Conference Chairman: Mr. Siyabonga Gama, Chief Executive Officer, Port Authority Division, Portnet

At Montreal, IAPH delegates were honored by the most enthusiastic wel-

come expressed by Honorable Mr. Abdular M. Omar, Minister of Transport, Honorable Mr. Jeff Radebe, Minister for Public Enterprises, South Africa.

Mr. Gama, in his invitational notes, cites, "So, do make a point to pencil the dates of 24 to 30 May 2003 in your diary. Portnet, South Africa, Durban, and the peoples of South Africa look forward to extending Africa's Warmest Welcome to you in 2003".

24th IAPH World Ports Conference in 2005, Shanghai, China

At the special Board Meeting organized on Friday, May 25 2001, following the presentation by Mr. Tatsuo Yada, Deputy Mayor of Kobe City for the Port of Kobe, and Mr. Lu, Haifu for the Port of Shanghai respectively, Board Members were invited to vote for the selection of the venue for the 2005 Conference.

As the result of voting, Shanghai was selected as the Venue of our 24th IAPH World Ports Conference. Thus, I report

to you that the IAPH World Ports Conference in 2005 will be held in Shanghai, China. Mr. Lu, Haifu, Director, Port of Shanghai, accepting the decision, expressed his firm commitment for the successful Conference in Shanghai.

Taking this opportunity, I express my hearty thanks to Mr. Tatsuo Yada and Port of Kobe for their enthusiastic effort during the past years. Thank you so very much.

Mid-Term Board Meeting in 2002, Abu Dhabi, UAE

At the generous support and hospitality extended by H.E. Hasan Musa Al Qumzi, Under Secretary, Abu Dhabi Seaport Authority (P.O. Box 422, Abu Dhabi, UAE, Tel: 001-971-2-673-1830, Fax: 001-971-2-673-1023), the Mid-Term Board Meeting will take place in Abu Dhabi on April 19/25, 2002.

Mid-Term Board Meeting in 2002 will be held preceded by the meetings of various committees. The Asian/Oceania Regional Meeting will further precede it. Participants at to the meetings of the Board and other Committees are welcome to observe the Asia/Oceania Regional Meeting. Participants at to the Asian/Oceania Regional Meeting are welcome to observe the committee meetings as well as Board Meeting, and further join the Technical Tour. Overall schedule will be as follows:

Friday 19 April 2002

Morning hours: Delegates arrive

Saturday 20 April 2002

Morning hours: Asia/Oceania Regional Meeting



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Afternoon hours: Asia/Oceania Regional Meeting

Related functions for all:
Get-together reception for the Early Arrivals

Sunday 21 April 2002

Morning hours: Committee Meetings

Afternoon hours: Committee Meetings

Related functions for all:
Per-Board Meeting Get-together and dinner

Monday 22 April 2002

Morning hours: Board Meeting

Afternoon hours: Board Meeting

Tuesday 23 April 2002

Morning hours: Board Meeting

Afternoon hours: Regional Board Meeting
- African/Europe
- American
- Asian/Oceania

Related functions for all:
Farewell Dinner

Wednesday 24 April 2002

Morning hours: Technical Tour

Afternoon hours: Technical Tour

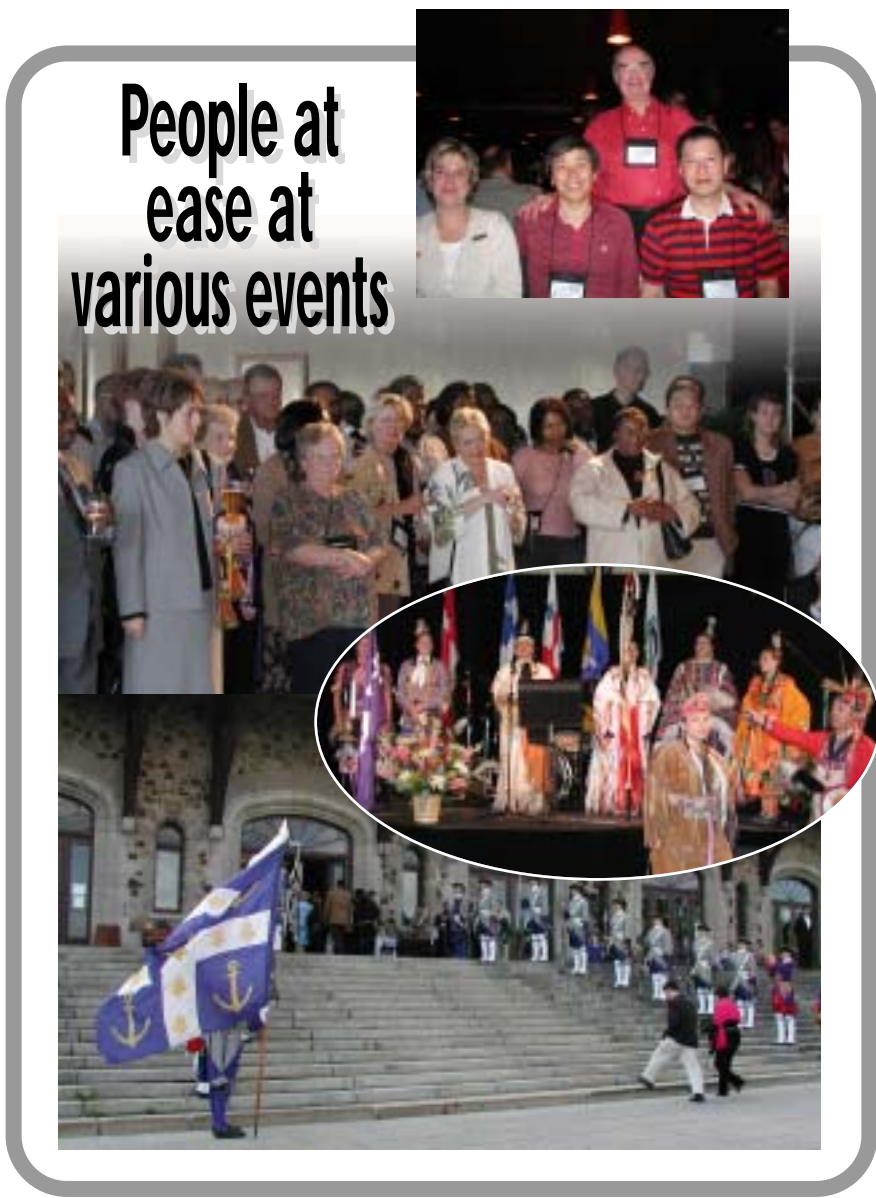
Thursday 25 April 2002

Morning hours: Delegates leave

Afternoon hours: Delegates leave

Exco Meeting in 2001, Auckland, New Zealand

At the generous support and hostship extended by Mr. Geoff Vazey, Chief Executive, Ports of Auckland Limited, New Zealand, the Meeting of Exco will take place in Auckland from 25 to 27 October, 2001.



People at ease at various events



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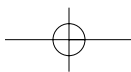
List of President, Vice Presidents and Exco Members for 2001/2003 Secretary Generals, Legal Counselors and IAPH Liaison Officers with IMO

Officers	Africa/Europe	America	Asia/Oceania
President			Akio Someya <i>Port of Nagoya Japan</i>
1st Vice President	Pieter Struijs <i>Port of Rotterdam Netherlands</i>		
2nd Vice President		H. Thomas Kornegay <i>Port of Houston Authority USA</i>	
3rd Vice President			John Hayes <i>Sydney Ports Corporation Australia</i>
Immediate Past President		Dominic J. Taddeo <i>Montreal Port Authority Canada</i>	
Conference Vice President	Siyabonga Gama, CEO <i>Portnet South Africa</i>		
Exco Members	E. Bruyninckx <i>Antwerp Port Authority Belgium</i> Bruno Vergobbi <i>Port of Dunkirk Authority France</i> Aliou Diallo <i>Conakry Port Authority Guinea</i> Gunnar Nygren <i>Port of Göteborg Sweden</i> S.M.E. Luhigo <i>Tanzania Harbours Authority Tanzania</i> Dennis Dunn <i>Associated British Ports UK</i>	David Bellefontaine <i>Halifax Port Authority Canada</i> Errol Bush <i>Port Authority of Cayman Islands, Cayman Islands</i> Larry A. Keller <i>Port of Los Angeles USA</i> Bernard S. Groseclose, Jr. <i>South Carolina State Port Authority, USA</i>	Lu Haihu <i>Shanghai Port Authority China</i> Oliver F.L. Yu <i>Kaohsiung Harbor Bureau China</i> Sumardi <i>Port Corporation III Surabaya, Indonesia</i> Susumu Naruse <i>Ministry of Land, Infrastructure and Transport, Japan</i> Kim, Young-Nam <i>Ministry of Maritime Affairs & Fisheries, Korea</i> Datin Paduka O.C. Phang <i>Port Klang Authority Malaysia</i> Geoff Vazey <i>Ports of Auckland Limited New Zealand</i> Goon, Kok-Loon <i>PSA Corporation Ltd Singapore</i>
Legal Counselors	R. Rezenthel <i>Port of Dunkirk Authority France</i> Frans J. W. van Zoelen <i>Port of Rotterdam Netherlands</i>	Hugh H. Welsh (in chair) <i>Port Authority of NY/NJ USA</i> J. Mongeau (Vice Chair) <i>Montreal Port Authority, Canada</i> Patrick J. Falvey <i>IAPH Honorary Member Attorney at Law, USA</i>	A.P. Morrison <i>Waterways Authority Australia</i>
Secretary General: Satoshi Inoue			

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List of Chairs and Vice Chairs of Various Committees for 2001/2003

Internal Committees		
	Chair	Vice Chair
• Finance Committee	Garth Cowie <i>Port of Napier Ltd., New Zealand</i>	
• Constitution & By-Laws	Hugh H. Welsh <i>The Port Authority of New York and New Jersey, USA</i>	J. Mongeau <i>Montreal Port Authority, Canada</i>
• Long Rang Planning/ Review Committee	Bernard S. Groseclose, Jr. <i>South Carolina State Ports Authority USA</i>	
• IAPH/IMO Interface Group	Pieter Struijs <i>Port of Rotterdam, The Netherlands (Authority delegated by the President)</i>	Peter van der Kluit <i>IAPH Liaison Officer & Managing Director, IAPH Representative Office in Europe</i>
Group of Committees for Sustainment & Growth		
Coordinating Vice President: Pieter Struijs, 1st Vice President		
	Chair	Vice Chair
• Membership	Datin Paduka O.C. Phang <i>Port Klang Authority, Malaysia</i>	Allen Domaas <i>Fraser River Port Authority, Canada</i>
• Communication and Networking	Jose Perrot <i>Port of Le Havre, France</i>	
• Human Resources Development	Goon, Kok-Loon <i>PSA Corporation Ltd., Singapore</i>	Vincent Lim <i>PSA Corporation Ltd., Singapore</i>
Group of Committees for Technical Affairs		
Coordinating Vice President: Tomas Kornegay, 2nd Vice President		
	Chair	Vice Chair
• Port Safety, Environment and Marine Operations	Ferry van de Laar <i>Port of Amsterdam The Netherlands</i>	John Hirst <i>The Association of Australian Ports and Marine Authorities Inc., Australia</i>
• Dredging Task Force	Geraldine Knatz <i>Port of Long Beach, USA</i>	
• Legal Protection	Bruno Vergobbi <i>Port of Dunkirk Authority, France</i>	Frans van Zoelen <i>Port of Rotterdam, The Netherlands</i>
<i>Assistant to the Chair: Jacques Braems, Port of Dunkirk Authority, France</i>		
• Trade Facilitation	Emili Arbos <i>Port of Barcelona, Spain</i>	
<i>Assistant to the Chair: Santiago Milà, Port of Barcelona, Spain</i>		
Group of Committees for Port Industry Research and Analysis		
Coordinating Vice President: John Heyes, 3rd Vice President		
	Chair	Vice Chair
• Cargo Operations	Yoseph Bassan <i>Ashdod Port, Ports & Railways Israel</i>	Wang, En-De <i>Port of Tianjin, China</i>
• Ship Trends (Confirmed and finalized: Jun 14 2001)	Bernard Coloby <i>Port of Le Havre, France</i>	Abdul Rahim Abd. Aziz <i>Penang Port Commission, Malaysia</i>
• Combined Transport & Distribution (Logistics)	Jose Louis Estrada <i>Puertos del Estado, Spain</i>	
• Port Planning & Construction	John Hayes <i>Sydney Ports Corporation Australia</i>	Susumu Naruse <i>Ministry of Land, Infrastructure Transport, Japan</i>
• Trade Policy	<i>Future direction and formation of this committee is yet to be formulated by the Long Range Planning/Review Committee. Therefore, the listing is temporary and subject to further confirmation.</i>	
Liaison officers		
Liaison work with		
• ECOSOC: UN-Economic and Social Commission, New York, USA	Richard M. Larrabee , Director, Port Commerce Department <i>The Port Authority of NY & NJ</i>	
• IMO: International Maritime Organization, London UK	Peter van der Kluit , IAPH Liaison Officer with IMO, Managing Director <i>IAPH Representative Office in Europe, via MSR</i>	
• UNCTAD: UN Conference on Trade and Development, Geneva, Switzerland	Goon, Kok-Loon , Deputy Group President (International), <i>PSA Corporation Ltd., Singapore</i>	
• WCO: World Customs Organization, Brussels, Belgium	Emili Arbos , Port of Barcelona, Spain	
• UNEP: UN-Environment Program, Nairobi, Kenya (IAPH status needs to be confirmed)	Brown M.M. Ondego , Managing Director, <i>Kenya Ports Authority, Kenya</i>	
• ILO: International Labor Office, Geneva, Switzerland	Mike Compton , Health and Safety Adviser <i>PSO (Technical Services) Ltd., UK</i>	



22ND IAPH WORLD PORTS CONFERENCE

IAPH Officers and Executive Committee Members (2001 - 2003)

As of May 2001



President
Akio Someya
Executive Vice President
Nagoya Port Authority
Japan



1st Vice-President
Pieter Struijs, Executive Director
Rotterdam Municipal
Port Management
The Netherlands



2nd Vice-President
H. Thomas Kornegay
Executive Director
Port of Houston Authority
U.S.A.



3rd Vice-President
John Hayes, Executive Officer
Policy and Planning
Sydney Ports Corporation,
Australia



Immediate Past President
Dominic J. Taddeo
President and CEO
Montreal Port Authority
Canada



Conference Vice President
Siyabonga Gama
CEO, Port Authority Division
Portnet, South Africa



E. Bruyninckx
CEO
Antwerp Port Authority
Belgium



Bruno Vergobbi
General Manager
Port of Dunkirk Authority
France



Aliou Diallo
Director General
Conakry Port Authority
Guinea



Gunnar Nygren
President & CEO
Port of Göteborg
Sweden



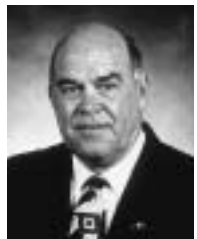
S.M.E. Luhigo
Director General
Tanzania Harbours Authority
Tanzania



Dennis Dunn
Director, Grimsby & Immingham
Associated British Ports
UK



David F. Bellefontaine
President and CEO
Halifax Port Authority
Canada



Errol L. Bush, Port Director
Port Authority of the Cayman
Islands
Cayman Islands



Larry A. Keller
Executive Director
Port of Los Angeles
U.S.A.



Bernard S. Groseclose, Jr.
President & CEO
South Carolina State Ports
Authority, U.S.A.



Lu Haihu
Port Director
Shanghai Port Authority
China



Oliver F.L. Yu
Director
Kaohsiung Harbor Bureau
China



Sumardi
Board Member
Indonesia Port Corporation III
Indonesia



Susumu Naruse
Ministry of Land,
Infrastructure and Transport
Japan



KimYoung-Nam
Director General
Ministry of Maritime & Fisheries
Korea



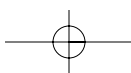
Datin Paduka O.C. Phang
General Manager/CE
Port Klang Authority
Malaysia



Geoff Vazey
Chief Executive
Port of Auckland Limited
New Zealand



Goon Kok-Loon
Deputy Group President
(International)
PSA Corporation
Singapore



IAPH ANNOUNCEMENTS AND NEWS

Phasing-out Single Hull Tankers

Reports from IMO/MEPC 46

THE outcome of IMO/MEPC 46 was in general as predicted. Single hull tankers will be phased-out within two distinctive time frames: 2003 to 2007 for the pre-MARPOL tankers and 2003 and 2015 for the PL/SBT single hull tankers.

There were a few but significant changes to the initial suggestion to which MEPC 46 agreed. Since the report herewith will cover all aspects of the phase-out, the new or additional agreements will be marked with bold letters and figures.

Application dates for the new regulations

MEPC 46 has agreed to adopt the new requirements (basically serious amendments to the existing regulation 13G of MARPOL Annex I) through a "tacit acceptance." This means that they are deemed to enter into force on 1 September 2002 provided that before 1 March 2002 not less than one-third of the Parties to MARPOL or the combined merchant fleets of which constitute not less than 50 per cent of the gross tonnage of the world's merchant fleet, have communicated to the Organization their objection to the amendments.

Phase-out Scheme

The phase-out table as finally agreed is as follows:

Category of oil tanker	Year
Category 1	2003 for ships delivered in 1973 or earlier
	2004 for ships delivered in 1974 and 1975
	2005* for ships delivered in 1976 and 1977
	2006* for ships delivered in 1978, 1979 and 1980
	2007* for ships delivered in 1981 or later
Category 2	2003 for ships delivered in 1973 or earlier
	2004 for ships delivered in 1974 and 1975
	2005 for ships delivered in 1976 and 1977
	2006 for ships delivered in 1978 and 1979

Category 3	2007 for ships delivered in 1980 and 1981
	2008 for ships delivered in 1982
	2009 for ships delivered in 1983
	2010* for ships delivered in 1984
	2011* for ships delivered in 1985
	2012* for ships delivered in 1986
	2013* for ships delivered in 1987
	2014* for ships delivered in 1988
	2015* for ships delivered in 1989 or later
	2003 for ships delivered in 1973 or earlier
	2004 for ships delivered in 1974 and 1975
	2005 for ships delivered in 1976 and 1977
	2006 for ships delivered in 1978 and 1979
	2007 for ships delivered in 1980 and 1981
	2008 for ships delivered in 1982
2009 for ships delivered in 1983	
2010 for ships delivered in 1984	
2011 for ships delivered in 1985	
2012 for ships delivered in 1986	
2013 for ships delivered in 1987	
2014 for ships delivered in 1988	
2015 for ships delivered in 1989 or later	

* Subject to compliance with the Condition Assessment Scheme (CAS)

Notes

1. **The date of the phase-out is the "anniversary of the date of delivery of the ship in the year specified in the table".**
2. **Although the phase-out of all single hull tankers finishes in 2015, there are a few exemptions which are mentioned below.**

Category of tankers

"Category 1 oil tanker" means an oil tanker of 20,000 tons deadweight and above carrying crude oil, fuel oil, heavy diesel oil or lubricating oil as cargo, and of 30,000 tons deadweight and above carrying oil other than the above, which does not comply with the requirements for PL/SBT (protectively located segregated ballast tanks).

"Category 2 oil tanker" means an oil tanker of 20,000 tons deadweight and above carrying crude oil, fuel oil, heavy diesel oil or lubricating oil as cargo, and of 30,000 tons deadweight and above

carrying oil other than the above, which complies with the requirements for PL/SBT.

"Category 3 oil tanker" means an oil tanker of 5,000 tons deadweight and above but less than that specified in under the definition of "Category 1" and "Category 2" oil tankers.

Note

It is important to understand that these requirements apply to tankers when carrying MARPOL Annex I products, which means crude oil, fuel oil, heavy diesel oil, lubricating oil or oil products. Other cargoes like animal and vegetable oils are categorized under MARPOL Annex II and, thus, tankers carrying such cargoes only would not be subject to these regulations.

Exemptions

There is no extension for a Category 1 ship as beyond its scheduled phase-out date.

For Category 2 and Category 3 tankers, there are few changes as compared with the initial proposal:

1. **In the case where a Category 2 or 3 oil tanker is fitted with only double bottoms or double sides not used for the carriage of oil and extending for the entire cargo tank length, or with double hull spaces which are not used for the carriage of oil and extending for to the entire cargo tank length, but does not fulfill the conditions of Ship Type II of the IBC Code, the Administration may allow continued operation of such a ship beyond the date specified in the table above, provided that:**
 - (i) the ship was in service on 1 July 2001;
 - (ii) the Administration is satisfied by verification of the official records of the ship compiled with the conditions specified above;
 - (iii) the condition of the ship specified above remains unchanged; and
 - (iv) such continued operation does not go beyond the date on which the ship reaches 25 years after the date of its

IAPH ANNOUNCEMENTS & NEWS

delivery;

31 May 2001

Note

This means that the Category 2 tankers built between 1991 and 1996 with full double sides or full double bottoms will be allowed to trade up to their 25th anniversary date, i.e. from 2016 through 2021.

Category 3 tankers built between 1991 and 1 July 2001 with full double bottom or full double sides will also be allowed to trade up to their 25th anniversary.

In addition, Category 3 ships having 30% side or 30% bottom protection by void spaces or that operate under HBL will be allowed to trade up to their 25th anniversary or year 2017, whichever is earliest (the rule also mentions Category 2 but this is obviously unnecessary since Category 2 is by definition a PL/SBT tanker and thus complies with 30% side or bottom protection).

However, Port States have the right to deny entry of such tankers into their ports or offshore terminals. In such cases, they shall communicate to IMO their decision for circulation.

Note

It appears that the additional provisions were brought in as a result of a paper submitted by Brazil which got strong support from some other countries. Apparently, the EU countries have made known that they will not accept tankers making use of these exemptions. Likewise, Malta and Cyprus made statements that they will not allow tankers under their Flags to make use of these exemptions.

Condition Assessment Scheme (CAS)

CAS will apply to Category 1 and Category 2 tankers that are due to be phased-out after 2005 and 2010 respectively. The text says that

“...an Administration may allow a Category 1 tanker to continue operating beyond the anniversary of the date of delivery of the ship in 2005 and a Category 2 tanker beyond the anniversary of the date of delivery of the ship in 2010, provided that the requirements of a Condition Assessment Scheme adopted by the Committee are complied with.”

IACS and INTERTANKO need to revisit the text of the standard Survey Plan for CAS until next MEPC in order to adapt it to the IMO language and to the final provisions under CAS.

ACTIVITIES REPORT

London Convention Scientific Group, 24th Meeting
May 20-25, 2001, London, England

Report of

Geraldine Knatz, IAPH Representative
andRichard Peddicord, Scientific Advisor
Dredging Task Force, International Association of Ports and Harbors

THE twenty-fourth meeting of the London Convention 1972 Scientific Group (LC/SG 24) was held in London, England on May 20-25 2001. Participants consisted of 63 representatives and alternates from 19 contracting parties, 3 observers from 2 non-contracting parties, and 10 observers from 7 non-governmental organizations (NGOs). The NGO representatives included Dr. Geraldine Knatz (Chairman) and Dr. Richard Peddicord (Scientific Advisor) of the International Association of Ports and Harbors (IAPH) Dredging Task Force. In addition, Dr. Rick Morton, Environmental Manager for the Port of Brisbane Corporation, also an IAPH Dredging Task Force member, participated as part of the Australia delegation.



Geraldine Knatz

The agenda item of greatest interest to IAPH was adoption of the final specific Guidelines for Assessment of Dredged Material, along with the final guidelines for assessment of the other categories of material that may be placed in the ocean under the London Convention and the 1996 Protocol. These waste-specific guidelines await the formality of final adoption by the Consultative Meeting in late 2001, but this is the culmination of six years' effort by IAPH resulting in the development of the dredged material guidance consistent with IAPH goals. Several other issues potentially important to IAPH were discussed. This report summarizes the actions of LC/SG 24 relevant to IAPH and their implications.

The Secretariat announced during the SG meeting that Saudi Arabia has acceded to the '96 Protocol.

Re-elected to serve the Scientific Group for the next three years were:

Chair: **Dr. Lynette Jackson**,
South Africa

Vice-Chair: **Mr. Craig Vogt**,
United States

1. ISSUES RELEVANT TO IAPH**1.1 Development of Guidance****Documents on Dredged Material Sampling, and on Physical, Chemical and Biological Analysis of Dredged Material**

During SG 23 drafting groups were formed to develop non-binding advice on sampling of dredged material and on physical, chemical and biological analysis of dredged material. Canada and the United States led development of the first document, with IAPH participation. The draft was considered by SG 24, and comments will be incorporated into a document that will be submitted to SG 25. Germany led development of the second document, but did not complete a draft for SG 23. The drafting group, including IAPH, met during SG23 and developed a working outline, writing assignments and schedule for completion of a draft document for consideration by SG 25 (copy attached). There is some pressure to make both guidance documents as specific, rigid and detailed as possible, which would be contrary to IAPH interests.

1.2 IAPH Presentation

Dr. Knatz, the IAPH Dredging Task Force Chairman, presented a paper describing a project conducted by the Port of Long Beach to validate a rapid screening analysis for dioxins in sediment presented by the United States at SG 21. The project confirmed that the new approach has merit and warrants further development. If the new approach continues to fulfill its promise, it will provide IAPH and others with a cost-effective means of screening dredged material for dioxin.

1.3 Waste Assessment Guidance (WAG) Training Set

The WAG Training Set has been refined in response to comments received at SG 23 and was present-

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ed to SG 24 as the basis for a Technical Cooperation Workshop being planned in Jamaica in conjunction with SG25. IAPH is maintaining vigilance to assure that the WAG Training Set is compatible with port interests.

1.4 Technical Cooperation and Assistance Workshop

Jamaica will host a workshop on waste management and marine pollution in the Caribbean region in conjunction with the meeting of LC/SG 25 in April-May 2002. This workshop will be modeled somewhat after similar workshops held in South Africa in 1998 and Australia in 2000. The proposed title of the Jamaican workshop is "Marine Pollution Prevention and Environmental Management in Ports in the Wider Caribbean Region." The proposed scope of the workshop focuses heavily on environmental issues involving ports, including dredged material management, that are seen as major concerns throughout the Caribbean region. The entire second day of the Workshop is devoted to "Environmental Management in Ports" including reception facilities, management of ballast water, land-based discharges, TBT, local case studies, waste characterization and management, identification of disposal sites, permitting, and EIS's. The third day will consist of three day-long Working Groups, one of which is devoted to dredged material. This workshop will deal much more extensively with topics directly related to IAPH interests than previous workshops. This provides an opportunity for IAPH to coordinate closely with the American Association of Port Authorities (AAPA), which has member ports in the wider Caribbean region, to advance port interests in the context of LC/SG activities. The desirability of cooperative participation in the Workshop should be evaluated, and if considered appropriate, steps should be taken promptly to assure our influ-

ence on the final program.

2. LC/SG FUTURE WORK PROGRAM

Activities on the Future Work Program for LC/SG 25 through LC/SG 27 of particular interest to IAPH include:

- Guidance documents on (1) sampling and (2) physical, chemical and biological analysis of dredged material. These documents, discussed in 1.1 above, are intended to merely provide advisory information to assist in implementation of the Specific Guidance for Assessment of Dredged Material. However, some countries and NGOs will push to make the guidance as specific, rigid and detailed as possible, contrary to the interests of IAPH.
- TBT antifouling paint compounds have the potential to affect dredged material management under the LC.
- Technical cooperation. The Jamaica workshop offers IAPH the opportunity to have a positive influence on the attitude of developing countries toward their ports through participation in environmental training activities.
- Habitat Modification/Enhancement. This new topic on the Future Work Program includes beneficial uses of dredged material, and may provide an opportunity for IAPH to showcase the environmental enhancement activities of ports.

3. FUTURE IAPH ACTIVITIES

3.1 Waste-Specific Guidelines

Because the waste-specific guidelines for the various materials are viewed as "living documents" to be reviewed periodically, IAPH should remain vigilant that the Guidelines for Assessment of Dredged Material are not altered contrary to port interests, and to avoid language or concepts in guidelines on other materials that could later be leveraged into the dredged material guidelines to their detriment.

3.2 Jurisdictional Issues

Because of their potential implications for activities important to some ports, the issues of the scope of the

LC in relation to dredging and placement for purposes other than mere disposal should be watched closely by IAPH at the Consultative Meeting, and at the SG in whatever context these issues might arise. These issues will be on the agenda for discussion at the LC Consultative meeting in October, 2001.

3.3 IAPH Scientific Papers

IAPH should identify opportunities to maintain its status as a respected contributor to the SG, and to enhance the image of the ports as leaders in environmental protection. The future work program provides potential opportunities to submit papers demonstrating port leadership in various areas, perhaps including:

- Monitoring - Description of dredged material disposal site selection and monitoring
- Waste management guidance - description of theory and practice of evaluating dredged material placement options, including beneficial uses, to identify the environmentally preferable alternative consistent with the dredged material assessment guidance
- Application of quantitative risk assessment in dredged material management
- Habitat modification/enhancement involving beneficial uses of dredged material

4. CONCLUSIONS

- IAPH is respected as a valuable contributor to the work of the SG. This status should be carefully maintained because dredged material is by far the largest class of material covered by the LC, and thus will always be a subject of SG interest.
- IAPH should encourage member ports to urge their national delegations to the LC and SG to support IAPH positions. Ports should become active participants in the activities of their national delegations to the LC, following the example of Australia.

Visit the new IAPH website launched on 1 January 2001 at

<http://www.iaphworldports.org/>

to find out more about IAPH and the world port industry IAPH represents.

For IAPH members to enter the "Members Area",
you need a user ID and a password assigned by the IAPH Secretariat in Tokyo.

NB.: Our group email address is now <info@iaphworldports.org>, while our former email address at <iaph@msn.com> was closed and terminated in November 2000.

IAPH ANNOUNCEMENTS & NEWS

Mr. William A. O'Neil to lead IMO for two more years

LONDON - 19.06.01

THE International Maritime Organization's Council has approved a two-year extension to Mr William O'Neil's contract as secretary general.

Addressing the Council meeting, Mr O'Neil said "I would like to thank the Council members for honouring me with the renewal of my contract for another two years and I am very pleased to be able to continue to serve the Organization. I also thank the staff of the Secretariat for the assistance and support given to me since my initial appointment in 1990."

Looking ahead to what will be a period in which significant long-term efforts to improve maritime safety and reduce the risk of pollution will take effect, Mr O'Neil said, "The next two years are important for the Organization and I look forward to putting in place measures that will ensure world shipping has the best possible service. By dealing with issues at IMO and providing the leadership the world is looking for, we will be able to maintain IMO's

position in the shipping sector, and to enhance it."

Among the major landmarks for IMO and world shipping during the next two years will be the final implementation date of the revised STCW Convention, which is concerned with the training and certification of seafarers, and the extension of the International Safety Management (ISM) Code to all cargo ships of 500 gross tonnage and above.

These two measures form the cornerstone of IMO's drive to focus on the human element in shipping during the 21st Century. Other key initiatives expected to produce significant results during the remainder of Mr O'Neil's term of office include large-scale reviews of the safety of passenger-ships and bulk carriers, in both of which

Mr O'Neil has undertaken a strong personal role.

Mr O'Neil added, "There are a number of things the Organization is engaged in right now which I would like to see through and together we can ensure that the fundamental objectives of the Organization can be pursued." Referring to the projected enlargement of the IMO Council from 32 to 40 members, Mr O'Neil said, "It is important to have representation on the Council from all parts of the world and I look forward to the 1993 amendments to the IMO Convention being put in place. I therefore place stress on fulfilling the requirements for their entry into force."

The extension to Mr O'Neil's contract has to be approved by the IMO Assembly when it meets in November this year.

Membership Notes**New Members****Regular Members**

Port Authority of Trinidad & Tobago (Trinidad & Tobago)
Address: P.O. Box 549, Dock Road, Port of Spain, Trinidad W.I.
Mailing addressee: Colin G.L. Lucas, CEO
Tel: (868) 623-2901-5
Fax: (868) 627-2666
Email: patt@wow.net
Website: <http://www.patnt.com>

Paradip Port Trust (India)
Address: Paradip Port Trust AT/PO: Paradip Port-745 142, India
Mailing addressee: Chairman
Tel: +91-06722-22046, 21127
Fax: +91-06722-22256
Email: pptinet@dte.vsnl.net.in
Website: <http://www.paradipport.com>

Associate Members

Robert Brown Associate [A-3-3] (England)
Address: 16 Ring Dyke Way
Lytham, Lancs FY8 4PT
England
Mailing addressee: Robert Brown, Director
Tel: +44-1253-73-22-61
Fax: +44-1253-73-2261
Email: rbajubob@aol.com

Changes (Changes involved are underlined)

Xiamen Harbor Bureau [Regular] (China)
Vice director and CEO: Mr. Xu Xiaoyong

Rotterdam Municipal Port Management [Regular] (The Netherlands)
Executive Director: Mr. Pieter Struijs

Westgate Transport Ltd [Regular] (New Zealand)
Chief Executive: Mr. Roy J Weaver

Pusan East Container Terminal Co., Ltd. (PECT) [Regular] (Korea)
President: Mr. Chang Nam KIM
Tel: +82-51-620-0201-2
Email: goodman@pect.co.kr

Visitors

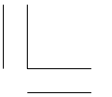
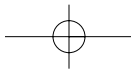
ON May 29, 2001, Mr. Shaun Sturge, Sales Manager, Oilfield Publications Limited, UK, at the introduction by IADC, visited the Head Office and met with Deputy Secretary General R. Kondoh.

ON June 16, 2001, Mr. Philip Rosser, Senior Manager, Trade Development, Sydney Ports Corporation, Australia, visited the Head Office and was received by R. Kondoh. Mr. Rosser inspected the passenger terminal facilities located in the immediate vicinity of the North Tower area where the IAPH Head Office is located.



ON June 29, 2001, Mr. Eric Brassart, Chief Executive Director and Ms. Monica Bonvalet, Director of Commercial Affairs, Port of Marseilles Authority, accompanied by Mr. M. Okumura, IMC Japan Limited, visited the Head Office and were received by Dr. Satoshi Inoue, Secretary General. In his welcome remarks, Dr. Inoue recited IAPH's thanks and appreciation to the Port of Marseilles for hosting the first mid-term board meeting in 2000. The trade development delegation of the Port of Marseilles, led by Mr. Brassart, was visiting Seoul, Tokyo, Shanghai and Hong Kong.





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COMMERCIAL SHIPPING PATTERNS IN THE ASIAN-PACIFIC, 1990-2000

— The Rise and Rise of China — *

THE Asian-Pacific — stretching from the Kuriles to the Malacca Strait — became the dominant arena within the world's maritime economy during the last decade of the twentieth century. Of particular moment has been the increased involvement of China. Over the period, China has assembled one of the world's largest commercial fleets, risen up the league of world shipbuilders to rank after Japan and Korea, and become the largest producer of containers. Not surprisingly, given the demand created by China's industrial production, the country is expected to be the greatest single factor influencing the world's shipping industry over the next decade.

Before speculating on China's future role in the world's shipping industry and its attendant strategic implications it is important to review the country's increased involvement in the world's maritime economy between 1990 and 2000. Although China has become a world force in shipbuilding, ship repair and ship demolition, attention here is restricted to its role in commercial shipping.

Prior to breaking down commercial shipping into its different components — bulk and container shipping — and highlighting the extent of China's involvement in them, it is important to identify the country's key economic core areas and their transport and communications connections.

SPATIAL STRUCTURE

An earlier attempt to identify key elements of the Asian-Pacific's spatial structure, and China in particular, drew on the notions of platforms and corri-



Peter J. Rimmer

Emeritus Professor Peter J. Rimmer is in the Division of Pacific and Asian History, Research School of Pacific and Asian Studies, The Australian National University, Canberra.

dors (Rimmer and Comtois, 1998). Essentially, the fixed platforms were the economic core areas undergoing rapid industrialization which, in turn, were interconnected by transport corridors. The platforms offer attractive market and investment sites for knowledge-intensive products and services, capital investment in seaports, airports and teleports, and bases for global network firms to manage their regional head-quarter functions. Defining the platforms proved to be a problem.

After rejecting both population sizes of urban agglomerations and eco-

nommic growth triangles as the basis for identifying the platforms they were distilled from analyses of international goods and passenger movements because they reflected the importance of these regional focal areas. Only the Pearl River Delta focused on Hong Kong was recognized as a major economic area. The lower Yangtse was seen as having potential to become a platform. Beijing and Shenyang did not have the high-level international transport connections and were ranked with other nodes.

This reliance on transport data was not entirely satisfactory because telecommunications were omitted. While the classification was able to accommodate changes in the ranking over time the distinctions were arbitrary. This shortcoming prompted an

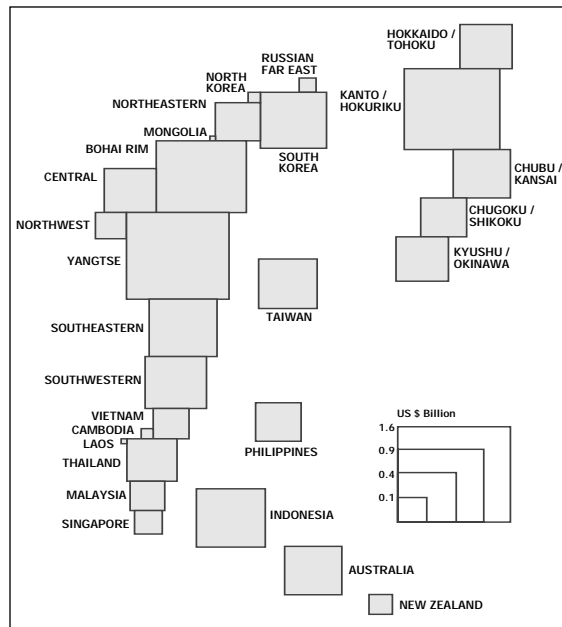
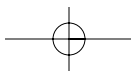


Fig. 1. Location of macro-regions in the Asian Pacific Rim based on their estimated Gross Domestic Product adjusted for Purchasing Power Parity (PPP) (Sources: World Bank, 2000; NSB, 2000; SB, 2000 and other statistical sources)

* This paper is extracted from a presentation given at a Conference on "The Strategic Importance of Seaborne Trade and Shipping: A Common Interest of Asia Pacific" held in Canberra 3-4 April 2001. The Conference was organised by the Australian Defence Studies Centre, Australian Defence Forces Academy (ADFA), University of New South Wales Canberra in association with the RAN (Royal Australian Navy) Sea Power Centre and the Centre for Maritime Policy.



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attempt to calculate the Gross Domestic Product of China's macro-regions in 1998 to give a better indicator of the relative strength of its economic platforms. The exercise reversed earlier suppositions as the Yangtse region had a 27 per cent higher regional GDP than the Bohai Rim centered on Beijing and 75 per cent higher than the Southeastern Coastal Zone focused on Guangzhou (even allowing for the inclusion of Hong Kong).

These figures are even more revealing when they are compared with Japan's macro-regions in terms of Purchasing Power Parity (PPP). A comparison with Japan shows that the Yangtse's Gross Domestic Product is 6 per cent larger than Kanto/Hokuriku. The Bohai Rim is almost as large as Kansai/Chubu encompassing both Osaka and Nagoya. Even without the addition of Hong Kong, China's Southeastern region outstrips all of the other macro-regions in Japan. (Fig. 1)

When compared with the Gross Domestic Product of other Pacific Rim countries, China's Southeastern region is almost on a par with Indonesia and South Korea. In addition, only the Gross Domestic Products of Australia, Taiwan and Thailand are greater than the economy of China's Northeastern region. The economies of the Philippines, Malaysia, Vietnam and Singapore are smaller. These relativities provide an essential background for exploring China's global and regional role in deep-sea shipping between 1990 and 2000.

DEEP-SEA SHIPPING

Before discussing the involvement of China and the Asian-Pacific in deep-sea shipping a distinction is made between carriers that handle commodities in bulk (e.g. oil, iron ore, coal and grain) and liners that handle general cargo on a regular schedule. Essentially, bulk operators buy ships as assets but container operators purchase transport and communications networks and marketing arrangements. While bulk carriers are still involved in the shipping business, increasingly, liner shipping is part of the wider hub-and-spoke multimodal transport system which seeks to meet the demands of manufacturers for a truly global reach in door-to-door services (logistics).

Bulk Shipping

China's share of the bulk seaborne

trade in crude oil, iron ore, coal and grain is still relatively small compared with other countries in the Asia-Pacific region. Yet the surge of industrial production centered on the Yangtse Delta and the Southeast Coastal zone has been responsible for much of the new growth in the world bulk trades. This rapid increase in demand has boosted energy and raw material supplies that have led to bottlenecks in China's ports, particularly as there has been a shortage of rolling stock to clear the rail-yards. These considerations have also revived interest in the importance of sea-lanes of communication between overseas producing areas and China's major industrial processing centers. As China, the world's largest producer of coal, is a net exporter of coking coal and steam coal, and its grain imports, primarily from America are erratic (due to the country's protectionist policies) these commodities are not considered. Attention is concentrated on crude oil movements — because China has become a net importer since 1993 — and the iron ore trade, which has increased markedly over the period under review to meet the country's steel-making demands,

Much reliance in this study is placed on information from maritime research institutes. Their emphasis on forecasting short and long-term demands for major commodities, such as crude oil and iron ore, stems from the bulk shipping market adhering closely to the principles of classical economics. Trends in commodities are matched against the mid-year supply of available

shipping tonnage to identify the supply-demand gap. A comparison of this supply-demand gap with freight rates provides the basis of forecasting longer-term trends in the shipping markets. When the tonnage is tight freight rates rise. Conversely, when it is slack freight rates decline. Such considerations are important as freight rates can account for over one-third the delivered price. Given these tight margins, a few cents difference can determine trading profitability or loss on crude oil and iron ore movements.

Crude oil

Traditionally, China was an exporter of crude oil but its markets declined as refineries in Japan, Singapore, the Philippines and the United States

Table 1. Crude Oil Demand, 1990, 1995 and 2000 (million barrels/daily)

	1990	1995	2000
Asia-Pacific			
China	2.3	3.4	4.6
Japan	5.3	5.8	5.7
Korea	1.0	2.0	2.2
Other	5.3	6.8	8.5
Sub-total	13.9	18.0	21.0
North America	20.7	21.6	24.2
Europe	14.6	15.3	16.3
Other	16.9	14.8	15.7
Total	66.3	69.9	77.0

Source: Kaiji Sangyo Kenkyujo (pers.comm).

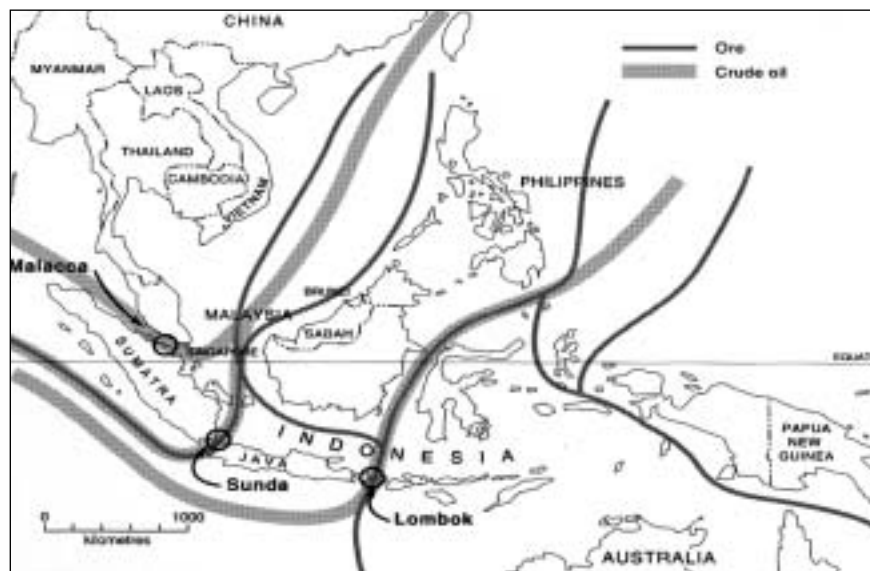


Fig. 2 Routes taken by iron ore carriers and tankers between Australia and the Far East. (Source: Rimmer, 1997: 22)

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imported stock to match new pollution regulations. As China's state oil producers were unable to meet demand stemming from increased car ownership, its refineries have had to import sweet crude oil — low in sulfur — from the Middle East and Southeast Asia. Singapore acts as an important transshipment center for crude oil and is a major source of refined products, especially gasoline. Looking ahead, China's crude oil imports are expected to treble over the next decade and significant increases are anticipated in product imports from the Middle East and Southeast Asia.

The major sea-lane used by tankers from the Middle East is the Malacca Straits (Fig. 2). Tankers that exceed 222,000 dwt have to divert through the Lombok Strait. Although the three day detour adds at least US\$200-300,000 per day to the voyage cost, economists have argued that even if the tankers had to divert around Australia (14 days) it would only make a small addition to the price at the petrol pump in Shanghai. Such a finding suggests that there may have been an overemphasis by strategic analysts on sea-lanes of communication: it is only part of the task of modern navies.

Iron ore

China is the world's largest producer of iron ore but it is low grade and imports have increased to meet growing consumption in the pig iron/steel industry. Australia supplies half of its imports (estimated as 55 million tonnes in 1998) with the balance being provided by Brazil, South Africa, Peru and Chile for security and quality reasons.

Table 2. Iron Ore Imports, 1991, 1995 and 2000
(million tonnes)

	1991	1995	2000
Asia-Pacific			
China	19.0	41.2	54.7
Taiwan	8.4	9.2	11.5
Japan	127.2	120.3	128.9
Korea	28.9	35.0	37.9
Other	11.1	12.3	11.5
Sub-total	194.6	217.9	246.8
Europe	136.6	140.6	138.6
Other	26.8	43.9	45.6
Total	358.0	402.0	431.0

Note: Rounding errors
Source: Kaiji Sangyo Kenkyujo (pers.comm).

Looking ahead, there is considerable potential for ore imports to China.

Ships carrying iron ore from Australia to China enter the Indonesian archipelago through the Lombok Strait and travel either via the Makassar Strait or to the northwest of Timor before proceeding through the Banda and Molucca Seas (Fig. 2). The heavy reliance on iron ore imports from Australia rendered China's crude steel production vulnerable to any restrictions on movements through the Indonesian archipelago and prompted the diversification of its sources to South America. Any precipitate action by the Indonesian government to close these sea-lanes would give Australia, China and the United States a common bond. This bond could be extended to combating the incidence of "piracy" in the Malacca Strait but this activity affects not only bulk ships but increasingly involves container vessels.

Container Networks

As there are no origin and destination data on movements between ports we have to infer the position of China and the Asian-Pacific in global container networks between 1990 and 2000 from

a variety of sources. These include analyses of port rankings, major trade routes, the itineraries of global shipping companies, the itineraries of China's leading container line, the Intra-Asian trade and planned changes in hub-feeder shipping arrangements. Indicative of the growing importance of China was its number of ports in the world 'Top-20' league.

Port rankings

In 1990 Hong Kong was the foremost port for the China trade (Fig. 3). Like Kaohsiung, Kobe, Singapore and Pusan it offered mainline services fed by small coastal feeder services to overcome China's poorly articulated land transport systems.

By 2000 Shanghai and Shenzhen (includes Chiwan, Shekou and Yantian) had joined Hong Kong among the world's 'Top-20' ports (Table 3). Outside the 'Top 20' were four other ports in China handling more than 1 million TEUs — Qingdao, Tianjin, Xiamen and Dalian — and Ningbo on 0.9 million TEUs. Further terminal expansion is planned in the Yangtze Delta, in Xiamen by Hutchison Ports and in Dalian by the PSA Corporation (Dekker, 2001).

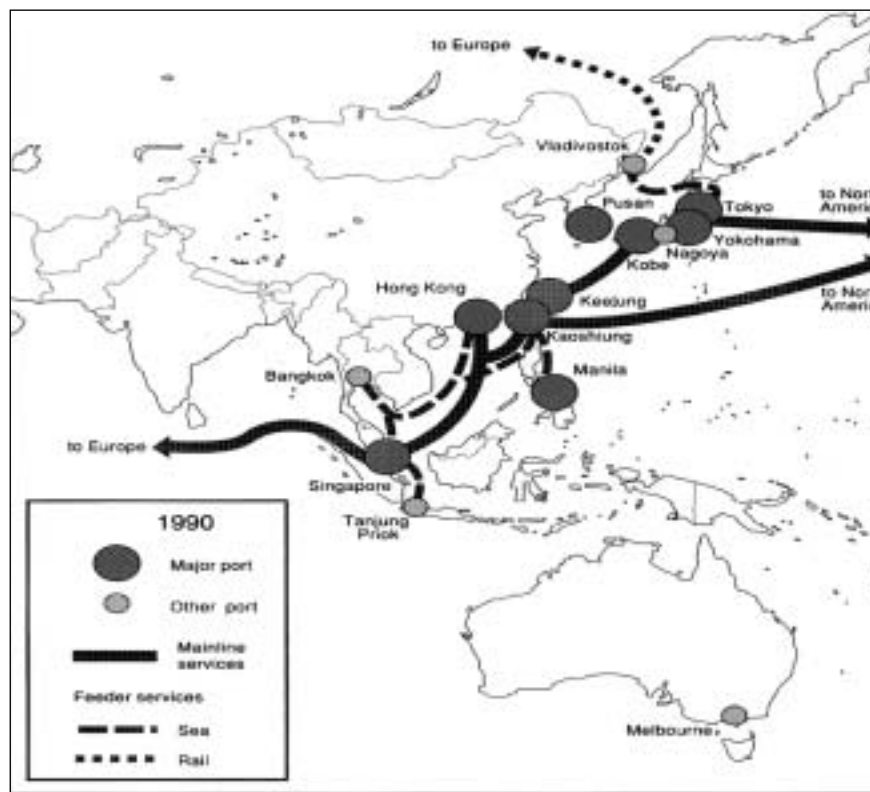


Fig. 3 Asian-Pacific seaports ranked among the world's 'Top-20' in the World Container League, 1990. (Data from CI, 1991)

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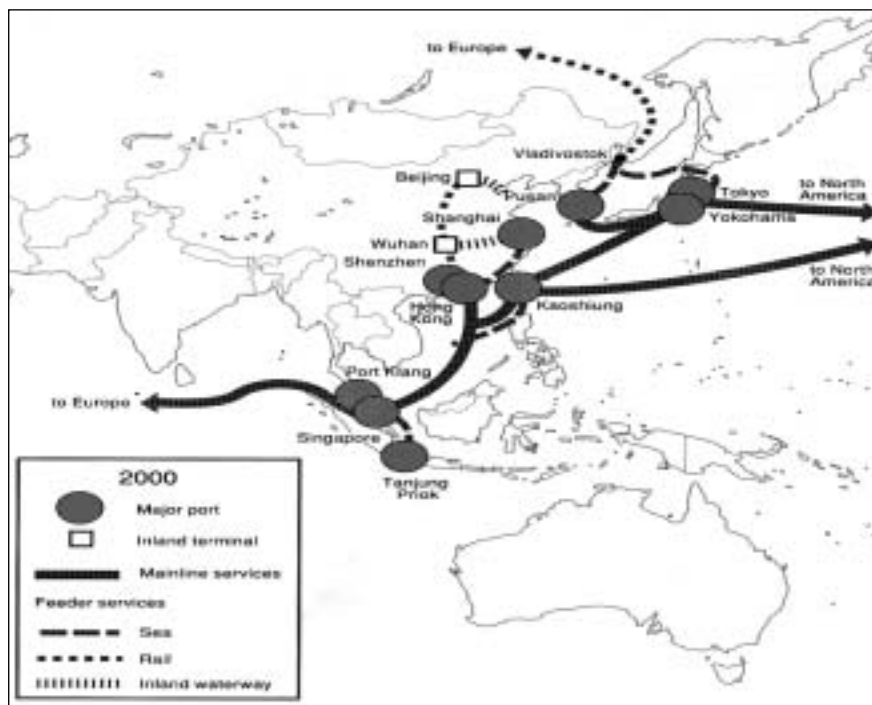


Fig. 4 Asian-Pacific seaports ranked among the world's 'Top-20' in the World Container League, 2000. (Beddow, 2001) Note inland transport routes are schematic.

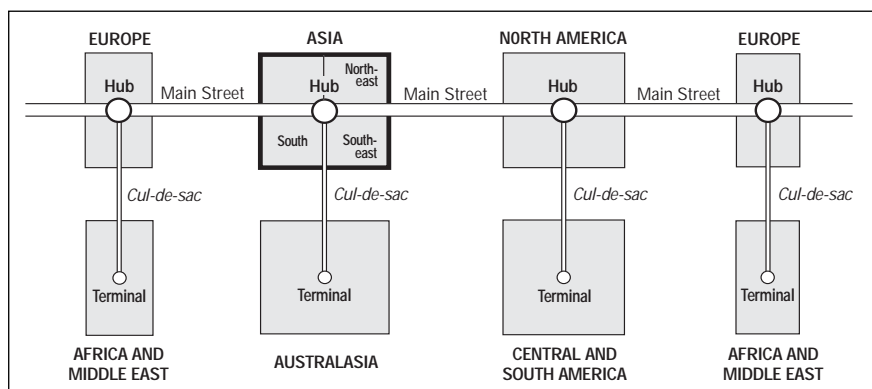


Fig. 5 The global hub-and-spoke system. (Source: Rimmer, 2001)

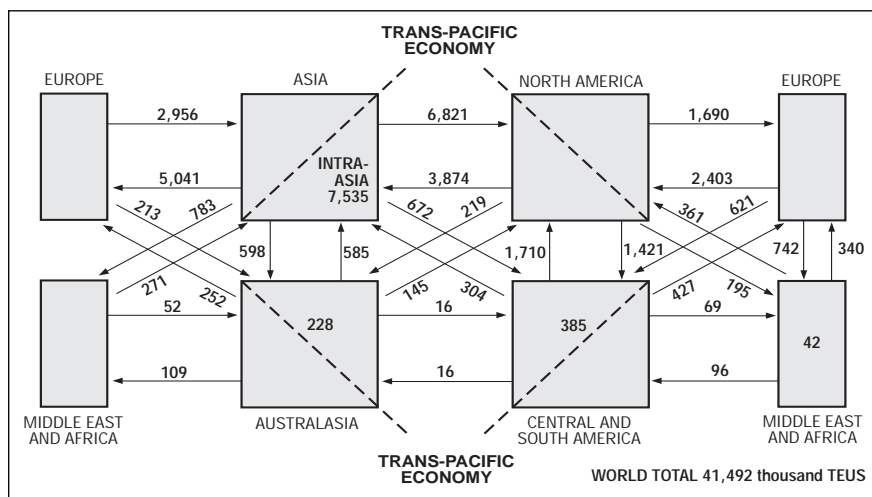


Fig. 6 World container shipping movements by trade, 1999. (Source: Data from Kaiji Sangyo Kenkyujo pers. comm.)

Table 3. China's Main Ports (million TEUs)

Port	1990	1995	2000
Hong Kong	5.1	12.5	17.8
Shanghai	0.5	1.5	4.2
Shenzhen*	—	0.3	3.0
Qingdao	0.1	—	2.1
Tianjin	0.3	0.7	1.7
Xiamen	—	0.3	1.1
Dalian	0.1	—	1.0
Ningbo	—	—	0.9
Fuzhou	—	—	0.4

Note: * Includes Chiwan, Shekou and Yantian. Source: CIY, 1991, 1996, 2001; Beddow, 2001.

These developments had been made possible by the expansion of inland container feeder networks within China (including the Trans-China landbridge) as part of a multimodal sea-land system offering door-to-door development 2,500 km away from the coast (Fig. 4). Although operators have had some success in using dedicated barges and rail to move containers within China its inland facilities are still poorly equipped and the leasing of equipment too expensive for widespread use. Trucking is still superior to rail within a 500-km radius of China's port complexes.

Trade routes

China's major container ports and their Asian-Pacific counterparts differ from those in the Southern Hemisphere (Fig. 5). They are located on an east-west 'Main Street' within the global hub and spoke container network designed by major shipping companies to accommodate the changes triggered by Asia's rapid industrialization. Large mother vessels service their innovative high volume/high growth markets. Traditionally, regional traders have serviced the low volume/low growth markets in the south (including South Asia). Following the shortage of containers during the Asian Crisis of 1997-98 the larger east-west operators have extended their operations to the north-south trades linking the cul-de-sacs. This development has favored the rise of hub ports or load centers at the junction between the two routes such as Hong Kong, Kaohsiung, Pusan and Singapore.

The pivotal position of China in the global hub and spoke system is borne out by an examination of world container movements in 1999 (Fig. 6). It was involved in the Trans-Pacific (two-way

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trade totaling 10.7 million TEUs) and the Trans-Suez route (7.4 million TEUs), both of which were larger than the Trans-Atlantic route (4.1 million TEUs). China was also involved in Intra-Asian movements (6.9 million TEUs).

China's contribution between 1990 and 1999 can be distilled from analyses of containers on the dominant Trans-Pacific route with its imbalance in favor of eastbound over westbound (USA to Asia) cargoes (Table 4). Over this period both China and Hong Kong enjoyed

Table 4. Eastbound Movements in Trans-Pacific Trade, 1990, 1995 and 1999
(thousand TEUs)

Origin	1990	1995	1999
China	235	1024	2180
Hong Kong	478	668	1066
Taiwan	674	564	658
Japan	835	749	791
Korea	359	285	427
Other	434	749	1055
Total	3015	4039	6177

Source: KSK, 2000.

continuous growth in trade from Asia to the USA with their combined total increasing from 613,000 TEUs in 1990 to 3.1 million TEUs in 1999. This contrasted with the decline in shipments from Japan and Taiwan and, the increased volume from Korea and all Southeast Asian countries, though the latter's growth rate was affected by the Asian Crisis in 1997 and 1998.

Only China maintained a continuous growth in westbound container flows from the United States to Asia (Table 5). All economies including Hong Kong suffered a marked turndown in cargoes in

Table 5. Westbound Movements in Trans-Pacific Trade, 1990, 1995 and 1999
(thousand TEUs)

Destination	1990	1995	1999
China	78	257	456
Hong Kong	199	457	363
Taiwan	405	416	322
Japan	868	1077	960
Korea	350	426	394
Other	311	528	458
Total	2211	3161	2953

Source: KSK, 2000.

Table 6. China's Intra-Asian Trade
(thousand TEUs)

Destination	1995	1998	2000*
From China			
Japan	523	576	603
NIEs	554	601	673
Southeast Asia	279	310	370
To China			
Japan	198	243	240
NIEs	423	529	558
Southeast Asia	168	237	255

Note: *Estimated

Source: Based on Fossey, 1998: 57.

1997 and 1998. Only China appeared immune from the Asia-Pacific Crisis of 1997-98.

In the Intra-Asian trade the volume of China's shipments with Japan and the Newly Industrializing Economies (NIEs) and Southeast Asia has grown rapidly between 1990-2000 (Table 6). Although receipts from Japan were reduced those from the NIEs and Southeast Asia were still expected to increase underlining that shipments had increased to offset the impact of the Asian Crisis.

Shipping itineraries

China's growing reputation as a cargo generator was reflected in the inclusion of ports other than Hong Kong — Shekhou and Yantian in the Pearl River Delta and Shanghai when the global shipping alliances were established in 1996. Further ports in China were added to these itineraries when the global shipping alliances were reorganized in 1998. Generally, they were first ports of call or last ports of departure because the 12m draft at Shanghai has limited hub development. Consequently, Shanghai does not yet have the load center status of Hong Kong and Kaohsiung in the Trans-Pacific services or Singapore and Hong Kong in the Trans-Suez services.

The inclusion of China Ocean Shipping Corporation (Cosco) in a global alliance with Japan's "K" Line and Taiwan's Yangming Line in 1998 was a marked departure from past practice. These developments stemmed from the creation of a specialized container arm (Coscon) in 1993 based in Shanghai and Cosco's intention to shrug off its image as a state-controlled outsider whose strategic decisions were dictated by price and market share.

Table 7. Liner Routes Operated by COSCO Container Line Ltd, 1990, 1995 and 2000

	1990	1995	2000
Trunks			
Trans-Pacific	3	1	7
Trans-Suez	3	3	6
Trans-Atlantic	0	0	1
Round-the-world	0	1	1
Sub-total	6	5	15
Intra-Asia			
Middle East	2	1	1
Southeast Asia	6	8	2
Northeast Asia	16	23	14
Intra-China	7	22	24
Sub-total	31	54	41
Other	5	7	4
Total	42	66	60

Source: CI, 1990, 1995, 2000.

Between 1990 and 2000 there was a progressive reorganization of Coscon's routes at a time when the fleet's largest vessel expanded from 2760 TEUs to 5600 TEUs. Apart from its involvement in shipowner associations and overseas stock markets, the most conspicuous development was the increased number of services on trunk routes focused on its offshore base and shared terminal in Hong Kong (Table 7). The other feature was the pronounced growth of Coscon's Intra-Asian feeder services by the mid-1990s and their subsequent rationalization — the small decline in number of services between 1995 and 2000 reflecting the introduction of larger vessels.

The Asian Crisis has prompted a revision of Intra-Asian services. While the backbone corridor, the Central Asia short-sea shuttles, and Central-South Asia services survive, the Central Asia-Northeast Asia services have proceeded apace since the early 1990s with the addition of direct services with Pusan in South Korea augmenting those established between China and Japan.

Offsetting the emergence of Coscon as a global carrier has been the creation of China Shipping (Group) Co. (CSG) as China's second national carrier ready for China's entry into the World Trade Organization (WTO). Originally, CSG's services were restricted to Intra-Asia services but it is now extending to the major east-west trunk routes and the north-south trades using chartered tonnage. As, like Coscon, it is regarded as a controlled carrier in the United States it cannot enter the Trans-Pacific trades by cutting rates without giving 30 days

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notice compared with 24 hours notice by its rivals (US Ocean Shipping Reform Act, 1999). In 2000 it was ranked fifteenth among the world's Top-20 liner operators compared with Coscon's seventh position (Fossey, 2000).

Looking ahead, both Coscon and CSG are anticipating that port throughput in China will rise rapidly as the movement of TEUs generally exceeds the growth in GDP which is expected to double between 2000 and 2010. Should this forecast be realized the major implication is that direct calls will be attractive at a wider range of ports and Hong Kong is likely to lose its ranking as the world's leading port in terms of throughput. Of course, such prognostications are dependent on short-term factors. These not only include shedding workers from state enterprises and removal of any preferred status accorded national carriers but also the strategic implications stemming from China's accelerated economic development between 1990 and 2000.

CONCLUSIONS

This paper has sought to highlight aspects of China's increasing involvement in the world's maritime economy rather than draw any strategic implications. Undoubtedly, China will seek to protect its coastal economic platforms and, given its dependence on sea-borne freight, its transport and communica-

tions corridors. As China has become so dependent on globalization since the adoption of its "open door" policy in 1979 it is likely that the country will seek to avoid endangering maritime security. Not only has China restructured its commercial fleet but also its ownership profile has been consolidated and centered on meeting anticipated traffic growth and engaging in the cross trades to earn revenue. Indeed, its shipowners are likely to access the newbuilding market (not necessarily using only domestic firms). The extent of China's integration into the world maritime economy suggests that it would not willingly put its international trade and commercial shipping, shipbuilding and ship repair activities at risk and dislocate its economy.

ACKNOWLEDGEMENTS

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Launch of Tokyo News Service's Website

Tokyo News Service, Ltd. has posted its website "S&TN OnLine" on the Internet. Provided on this homepage for easy reference are liner shipping schedules and related data extracted from Shipping and Trade News and Sea Sprite.

With use of the website initially being offered free of charge, we would like to invite you to sign up to access the latest updates on the homepage by first entering the information requested on the registration page.



URL: <http://www.tokyonews.co.jp/marine>

Information posted: 1. Sailing schedules a. Liner shipping schedules (export/import) to and from Japan b. Liner schedules (export) from Asian countries other than Japan c. Feeder schedules to and from Singapore
2. Ship details 3. Telephone and fax numbers of shipping firms and agents 4. Surcharges 5. News (in preparation)

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INTERNATIONAL MARITIME INFORMATION

WORLD PORT NEWS

Thor Heyerdahl Award for Green Award Foundation



The award is a stone sculpture of the *Kontiki* designed by Nicolaus Widerberg (who also designed the Thor Heyerdahl Monument in 1989).

Pictured From L to R: Heyerdahl and Struijs with framed certificate, de Goeij and Jack Post, Chairman of the Green Award Board of Experts.

THE first Thor Heyerdahl Award International Maritime Environmental Award, a prestigious prize that could go together with the Nobel Prizes, was awarded on the evening of Tuesday 29 May 2001, to the Green Award Foundation. This foundation, set up in 1994 on the initiative of Rotterdam Municipal Port Management (GHR), established in Rotterdam, is concerned with the approval and certification of ships, particularly oil and product tankers of 20,000 ton dwt and over. The Heyerdahl prize, named after the Norwegian explorer and environmental activist Thor Heyerdahl, has been awarded this year for the first time. The Norwegian shipping association Nor-Shipping took the initiative for this prize.

During a ceremony in Oslo Town Hall, Dr. Thor Heyerdahl presented the prize. The vice-president of the Green Award Foundation, Pieter Struijs (member of the board of the GHR) and its director Hans de Goeij were there to receive the award, which comes with a cash prize of 100,000 US dollars.

The president of Nor-Shipping, Leif Terje Loddesol, also chair of the

Heyerdahl Award committee, explained why the choice had fallen on the Green Award Foundation.

The Green Award Foundation has established market incentives to promote quality shipping. The contribution is unique and important, due to the fact that the granted cost reduction for quality ships strengthens their position in the market. It is also the Committee's view that this initiative is innovative and has been an inspirator for later similar initiatives, e.g. in Sweden and Australia. The QUALSHIP initiative of the United States Coast Guard may also be seen in this context. Green Award is thus a pioneer in the field of promoting a maritime environmental and safety conscious culture through a focus on the good quality operators, in place of the more common attention paid to the sub-standard operator. It is however recognised by the Committee that the Green Award not focuses solely on environmental protection, but on quality and safety in more general terms. This is not seen as a negative factor for the candidature.

At the moment, 140 tankers with a Green Award are sailing the world's

seas. In 2000, these ships transported over 20% of the international flow of crude oil.

Members of the Heyerdahl Award committee are: the Duke of Edinburgh (Great Britain), Mikhail S. Gorbachev (Russia), Astrid Noklebye Heiberg (Norway), Gongchen Liu (People's Republic of China), Ait Ouhanni Madani (Morocco) and W. Jackson Davis (USA).

As from the 1st of January 2001 a Green Award certificate for bulk carriers became operational. Bulk carriers from 20,000 tonnes DWT and up can apply.

For further information:

Bureau Green Award, spokesperson

Fred Sanders

Tel.: 06 53 111389

E-mail: info@greenaward.org

Web site: www.greenaward.org

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INTERNATIONAL MARITIME INFORMATION

APM: 7th International Maritime Exhibition and Conference

5-7 September 2001 • Singapore Expo

Maritime and Logistics Week 2001 Preliminary Programme**Monday, 3 September**

- Morning
- Media Briefing
 - Asia Interprise
 - Int'l Chemical & Oil Pollution Conference (Shangri-la Hotel)
- Afternoon
- Asia Interprise
 - Int'l Chemical & Oil Pollution Conference (Shangri-la Hotel)

Tuesday, 4 September

- Morning
- Asia Interprise
 - Int'l Chemical & Oil Pollution Conference (Shangri-la Hotel)
- Afternoon
- Asia Interprise
 - Int'l Chemical & Oil Pollution Conference (Shangri-la Hotel)

Wednesday, 5 September

- Morning
- Ministerial Breakfast
 - Opening Ceremony
 - Asia Pacific Maritime/Asia Work Boat/Asia Logistics Expo Exhibition
- Afternoon
- Asia Pacific Maritime/Asia Work Boat/Asia Logistics Expo Exhibition
 - Asia Pacific Maritime Conference
 - Career Clinics for the Maritime / Logistics Industry
 - Marine & Propulsion Conference
 - Asia Logistics Conference
- Evening
- Maritime & Logistics Night
 - Industry Awards

Thursday, 6 September

- Morning
- Asia Pacific Maritime/Asia Work Boat/Asia Logistics Expo Exhibition
 - Asia Logistics Conference
 - Asia Pacific Maritime Conference
 - Marine & Propulsion Conference
 - Country Groups Cocktail Reception
 - Career Clinics for the Maritime / Logistics Industry
- Afternoon
- Asia Pacific Maritime/Asia Work Boat/Asia Logistics Expo Exhibition
 - Asia Logistics Conference
 - Asia Pacific Maritime Conference
 - Marine & Propulsion Conference
 - PSA Functions
 - Tea Reception - LSCMS
 - Country Groups Cocktail Reception
 - Site Visits
- Evening
- Country Groups Cocktail Reception

Friday, 7 September

- Morning
- Asia Pacific Maritime/Asia Work Boat/Asia Logistics Expo Exhibition
 - Career Clinics for the Maritime / Logistics Industry
- Afternoon
- Asia Pacific Maritime/Asia Work Boat/Asia Logistics Expo Exhibition
 - Site Visits
 - Country Groups Cocktail Reception

• Programme subject to change • Asia Interprise - A European Commission initiative to assist companies from the EU to establish useful relationships with Spore and

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IALA: DGNSS WORKSHOP

Alexandria, Egypt
September 24-28, 2001

ADVANCE NOTICE

AN IALA Workshop is planned to be held at Alexandria, Egypt during the period September 24-28, 2001, the prime objective of which is to encourage the countries bordering the Mediterranean and Black Seas to develop plans for the provision of DGNSS services to cover appropriate parts of both Seas.

The programme will provide for the background of DGNSS to be described by several presentations and will allow adequate time for the countries in the area to consider the development of provisional regional plans.

The opportunity will also be taken to discuss other recent developments in radionavigation and radiocommunication services that may impact on Aids to

Navigation or Vessel Traffic Services.

Write to Mrs. N. Margue at:
e-mail aismiala@easynet.fr; or,
Fax +33 1 34 51 82 05

The number of people attending the Workshop is likely to be limited and therefore early information on possible attendance would be helpful and would be taken into account when the final arrangements are being made.

ICS: Annual General Meeting Considers Erika Impact

THE International Chamber of Shipping (ICS) held its Annual General Meeting in Bath, United Kingdom, yesterday (9 May). Members from 20 nations debated the outcome of the recent IMO discussions on the accelerated phase-out of single hull tankers, and the impact of the "Erika" incident on the reassessment of maritime safety and pollution prevention.

"We applaud IMO for having reached a satisfactory outcome on the phasing-out of single hull tankers," said ICS Chairman, Rolf Westfal-Larsen. "Given the strong political focus underlying this debate, we can feel content with the agreement. Indeed, the final outcome is broadly similar to the compromise ICS proposed last October."

ICS members noted that well maintained single hull tankers will, subject to compliance with the new Condition Assessment Scheme (CAS), be able to trade until they are around 25 years of age, and that the anomaly contained in earlier proposals, whereby some MARPOL ships would have had to be withdrawn at a younger age than pre-MARPOL ships, had been corrected.

"Our strong plea now is that the European Parliament will accept the outcome of the international discussions and refrain from regional legislation. IMO's ability to act swiftly in the interest of its members has been confirmed, and its role as the industry's standard setting body has been firmly underlined," Mr. Westfal-Larsen added.

However, Mr. Westfal-Larsen said, "We believe that once the dust has settled on the IMO agreement we must return our attention to studying other potentially significant contributors to maritime safety and pollution prevention, including the underlying causes of structural failure, not least through continuing our dialogue with the classification societies. We are still not convinced

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that the classification societies fully appreciate the extent of change that may be needed to reassure responsible operators that every society is surveying ships to the same high standards."

The ICS meeting was especially concerned about a related issue - recent statements by the classification societies about the ISM Code.

"Instead of addressing criticism concerning the variable quality of audits and procedural weaknesses with regard to ISM certification, the response of the societies has been to suggest that the frequency of audits should be increased, and be conducted at the same time as structural or equipment surveys. Such proposals would seriously undermine the philosophy underlying ISM, confusing the audit of safety management systems with checking for compliance with technical standards, as well as failing to reward operators who take their responsibilities seriously."

The ICS AGM also reviewed the shipping industry's environmental performance.

"Although shipping remains the most environmentally friendly form of transport, ICS is concerned that our good reputation could be diminished by failure on the part of governments to ratify and implement new environmental rules agreed by IMO," commented Westfal-Larsen. "It is especially important that a sufficient number of governments ratify the new MARPOL Protocol on atmospheric pollution by ships, in order to discourage unilateral or regional action by countries who wish to see shipping brought into line with land-based transport standards."

Westfal-Larsen (Norway) continues to serve as ICS Chairman during 2001/2002.

The Vice Chairmen elected for 2001/2002 are Klaus Oldendorff (Cyprus) and Marnix van Overklift (Netherlands).

(10 May 2001)

ISF: Council Supports "Decent Work" in Shipping

ISF debates obstacles to adoption of ILO "framework" Convention

THE Council of the International Shipping Federation (ISF) met in Bath, United Kingdom, on 10 May 2001. The representatives of national shipowners' associations reviewed key developments in maritime labour affairs, including the performance of the shipping industry in the context of the International Labour Organization (ILO) campaign to promote "Decent Work."

The Council considered future ISF work on the radical development of a new ILO Convention which will consolidate existing maritime labour standards into a single, simpler instrument governing employment standards for seafarers. These discussions follow agreement between ISF and ITF, last January, to proceed with this radical initiative which forms part of the so-called "Geneva Accord."

ISF President, Rolf Westfal-Larsen, explained: "ISF has concluded that ineffective, outdated international labour standards are not in the best interests of the shipping industry. We therefore want to develop a new ILO Convention which governments will find easy to ratify, so that basic employment standards can be applied to all seafarers regardless of their flag. Our hope is that this new ILO Convention will eventually enjoy the same level of support as key IMO Conventions such as SOLAS and MARPOL."

However, Westfal-Larsen warned that there were essential requirements for success: "We must encourage the enthusiastic participation of governments, and we must work closely in step with the seafarers' representatives. Demands for excessive mandatory requirements to be incorporated into the new Convention will simply be unattractive to many governments, and will therefore defeat the objective of the exercise which is to produce standards which will enjoy a high level of global enforcement."

The Council agreed that work on the ILO Convention should now commence in earnest, forming a central part of the ISF work programme for the next four years. Following an intensive series of meetings with employers, unions and governments, the final text is expected to be adopted at a special ILO Maritime Conference in 2005. "In the meantime," noted Westfal-Larsen, "the new ISF Guidelines on Good Employment Practice will, we believe, make a real contribution towards upholding the shipping industry's existing high standards."

The Council also reviewed progress by governments regarding the implementation of the 1995 amendments to the IMO STCW Convention.

"The publication of the IMO "white list" represents the first phase of this major overhaul of the global training and certification system. The emphasis now must be on finalising the practical improvements required by the Convention. It is especially important that flag states comply with their new responsibilities, including the issue of

separate flag state recognition endorsements, before the end of the STCW transitional period in February next year," said Westfal-Larsen. "It is also vital that governments meet the new requirements concerning establishment of registers of seafarers' certificates in order that shipping companies can comply with their separate responsibilities, under STCW and ISM, to check the competence of the seafarers they employ."

Mr. Westfal-Larsen (Norway) was elected president of ISF for another year and Dr. Delle Piane (Italy) was elected Vice President for the year 2001-2002.

INTERNATIONAL PORT TRAINING CONFERENCE:

Conclusions on: Normalization of Training Curricula for the World Port Industry

THE 16th International Port Training Conference, having met in Rotterdam, the Netherlands from 27-30 May 2001 adopted at its Sixth Session the following conclusions as a result of papers delivered and discussions held on the subject pertaining to the Normalization of Training Curricula for the World Port Industry*.

General considerations

1. Port Authorities and cargo handling operators supervised by such authorities are neither governed by global standards on certification or by international provisions ensuring, by means of inspection, that ports operate under best-recognized practices. On the other hand, the shipping industry operates under a set of international rules governing a) working and living conditions, b) standards for certification of crews and c) safety conditions on board ship. Compliance of these rules is inspected, among others, by regional Port State Control agreements.
2. It is argued that ports may only operate under national rules. This argument is debatable. Ships must conform to the national rules of the flag they fly. The lack of appropriate application and control of the rules in many countries of registry led to the adoption of international instruments to pursue acceptable operational practices in this industry. Increasingly, the safety of ships, crews and the environment is also dependent on port services and Port State inspections offered. Accordingly, ports operating in con-

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formity with recognized international best practices could also serve the world shipping industry.

3. Although in 1951 port work was internationally recognized as an occupation, no instruments, comparable to the STCW (Standards on Training, Certification and Watchkeeping 1978) convention, are (presently) in force spelling out the minimum standards to which port personnel training must conform. This state of affairs is questionable. The economic benefits of standardization are not generally challenged by international organizations, which devote a substantial amount of money and resources to the drafting of standards.

** By Normalization the Conference understood it to mean Standardization.*

Special considerations

4. The existence of non-harmonized standards for similar technologies in different countries can contribute to the so-called "technical barriers to trade." Industries have long sensed the need to agree on world standards to help rationalize the international training process. This was, among others, the origin of the International Organization for Standardization (ISO) created in 1947.

5. Many port industries are presently pursuing certification for the quality of standards of the ISO. As part of the certification process the ISO stipulates that:

"The supplier shall establish and maintain documented procedures for identifying training needs and providing for the training of all personnel performing activities affecting quality. Personnel performing specific task shall be qualified on the basis of appropriate education, training and/or experience, as required. Appropriate records of training shall be maintained."

This development should strongly encourage international organizations and leading shipping and transport educational institutions to seek for minimum curriculum standardization.

6. The need for overcoming problems affecting the port industry throughout the world makes it also essential to consider standardization of teaching programs for port personnel at levels yet to be determined. This involves the opening of economies and trade liberalization, which in turn require a higher degree of port efficiency.

7. Standardization on the basic content of job descriptions is an alternative that could be considered for port training. Such an approach would in turn lead to a degree of standardized training to adhere to the requirements established in the above job descriptions. Standardized job descriptions would also set global benchmarks for developing training programs for international use.

8. Unlike the shipping industry, the port industry is a land-based industry with national practices and laws that have been developed for production industries. A number of countries have included the training and certification of portworkers in their national certification process. International instruments in force for Occupational Safety and Health in Dockwork, Handling of Dangerous Substances should be embodied in national certification standards covering safety, health and working practices.

This would ensure the application, where appropriate, of minimum training standards in these areas, promote best practices in ports from a national perspective and permit qualifications for cross port sectoral employment at regional levels. Training is an important element for improving terminal efficiency. Others are motivation, company culture, focus on service, clarity of performance requirements, transparent feedback and acceptable employment conditions. Together with proper and modern management optimal performance is reached.

9. The use of simulation techniques in educational programs for the port and shipping industries is rapidly becoming an essential tool for achieving optimal and rapid training results. Such techniques are developed on existing operational realities in these industries. To a large extent these realities are globally similar. Simulation techniques should be developed on such global realities for supporting standardization in (practical) training through simulation.

10. Training of port personnel is currently within the action programs and agendas of several international organizations. Unfortunately, there is no apparent effective coordination between these organizations.

Actions for follow-up by the International Port Training Conference (IPTC)

11. The Secretariat of the International Port Training Conference should,

within means available to it, submit the above conclusions to International Organizations active in the field of human resource development in the port industry. Where possible it should, through press releases, inform the public at large of the conclusions reached. Representatives of international organizations, regional training programs, shipping and transport colleges and port authorities participating in the 16th International Port Training Conference should, where possible, promote and/or disseminate in their areas of influence the conclusions reached.

12. As a first step, the IPTC should support the international organizations in coordinating their action programs and agendas related to the minimum standards for basic training with the emphasis on health and safety. Secondly, examine with the international organizations how far common standards might then be developed beyond the basic training with the involvement of both the public and the private sectors.

13. Memoranda of Understanding such as signed during the 16th International Port Training Conference between the Inter-American Committee on Ports of the Organization of American States and the Shipping and Transport College on co-operation and collaboration in the field of port training should continue to be promoted by the Secretariat of the IPTC. Such MOU's can contribute to furthering the concept of standardization of port training programs.

14. Regional projects for advancing training in the port and transport industries should, where possible, review their programs with a view to identifying areas where standardization of training is already taking place through practical means. The results of such reviews should be described at the next 17th IPTC to be held in 2003.

15. The IPTC should offer its experience gained since its inception in 1972 to bodies dealing with interfacing port and shipping, such as the Ship/Port Interface Working group of the IMO with a view to promoting the standardization of port training where relevant and possible.

For further information please contact:

Mr. Bartelomé de Boer, Executive Secretary of IPTC (International Port Training Conference) at e-mail address: chasqui@wxs.nl

INTERNATIONAL MARITIME INFORMATION

New Publications

Drewry:

Container market key milestones achieved in 2000

DREWRY Shipping Consultants' latest Container Market Quarterly reports on the liner shipping industry highlights that the millennium year witnessed a number of key milestones.

- Traffic volumes in the transpacific market surpassed 10 million teu for the first time, with the headhaul (eastbound) trade accounting for more than seven million teu.
- Strong growth in the Europe/Asia/Europe trade resulted in box volumes exceeding six million teu.
- Despite slower growth, the Europe/North America/Europe trade also achieved a record performance in 2000, with over 3.5 million teu shipped during the year.
- The increased use of post-Panamax tonnage meant that vessels capable of loading 5,000 teu and over contributed more than half a million teu slots to the world fleet for the first time.
- Carriers' combined revenues hit more than US\$90 billion for the first time.

Box-handling forecast to rise

Despite the slower start to 2001, Drewry does not subscribe to the view that it is all doom and gloom. The report forecasts growth in each of the main trade lanes, including a turnaround in the depressed North America/Europe sector. Globally, Drewry believes box-handling activity will rise 8.1% to 247.9 million teu.

However, with fleet capacity projected to increase by 12.5% in 2001, prices will soften and revenues/profits come under increased pressure. This says Drewry could lead to further industry consolidation.

Corporate activity

In 2000, the expected rounds of mergers and related corporate activity did not take

place, largely because of better financial results and a, generally, better 'feel good' factor in the carrier fraternity. Last year, the only significant takeovers comprised P&ON's acquisition of Farrell and Harrison Lines' (East African) operations and CP Ships's purchase of Christensen Canadian African Lines.

For further information contact:

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Owners costs set to rise

SHIPOWNERS can expect rising operating costs to impact on their trading results. Furthermore, these rises will be seen particularly in the manning, insurance and repair and maintenance sectors. In addition, owners will have to respond to external, often political, pressures which will have as their aim the "well being" of the ship and its crew and the environment.

In its latest report, "Ship Operating Costs Annual Review and Forecast", Drewry Shipping Consultants Ltd. concludes "during the later part of the 1990s shipping cost advantage favoured shipowners in most sectors. Over the next five years this advantage is moving away from shipowners." These changes, driven by developments within unrelated, cyclical markets, will reinforce the importance of cost control within ship operation.

Drewry's view is that overall operating costs will increase by about 15% over the five year period to 2004. At first glance, this might appear modest but the context is that this follows a comparable period when overall operating costs had fallen by between 8%-16% and, over the forthcoming period, the pace of cost escalation looks set to escalate as mid-decade approaches.

Insurance

Already volatile is the insurance sector. For some years shipowners have reaped the benefit of an industry which has reacted to mounting losses with premium reductions in order to bolster market share. 2001, finally, has brought the backlash with a number of former key players pulling out of the marine market. In addition, insurance conditions are being tightened up. As a consequence, the insurance sector is becoming instrumental in pushing shipping closer towards the requirement for a "ticket to trade" embracing IMO, IACS, PSC and other "standards".

Manning

Statistically, manning considerations can create a conundrum. There are estimates of officer shortages - but no evidence of ships not sailing for the lack of them. There are estimates of an oversupply of ratings. However, while the figures can be argued over - the trend is for the officer shortage to increase and the ratings surplus to reduce. The basic rules of supply and demand mark this as a pointer to cost increases. A greater concern is that increased salaries/wages and improved benefits may not resolve the problem - especially as the world fleet shows every sign of continuing to increase in number. The officer cadre in the "traditional nations" shows a high age profile. In the "emerging maritime supply" nations, there is evidence that officers do not want to have their at sea careers prolonged into their 50s.

R&M

The R&M market has been hardening but mainly in response to cyclical events. However, pressures are being increased by the "rule makers". Moreover, while - as in 2001 - vessels can be detained by port state control inspectors and still be in class "but at the very limits," the prospects of political (and possibly draconian) measures can never be more than an incident away. The "analyses" from the Castor incident - suggesting that "hyper active corrosion spread" may be a feature in modern vessels - could see class demands ratcheted up another notch.

For further information regarding this press release please contact:

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		Net capacity		Cargo demand		Net slot utilisation %	
		EB	WB	EB	WB	EB	WB
Transpacific	1999	7,578	5,865	6,343	3,389	83.70%	57.78%
	2000	9,049	7,025	7,237	3,732	79.98%	53.12%
	2001	9,832	7,616	7,706	3,929	78.38%	51.59%
Europe/Asia/Europe	1999	3,290	4,336	2,422	3,420	73.6%	78.87%
	2000	3,517	4,629	2,678	3,765	76.14%	81.34%
	2001	3,982	5,198	2,817	4,165	70.74%	80.13%
Transatlantic	1999	2,704	2,708	1,500	2,014	55.47%	74.37%
	2000	2,687	2,697	1,543	2,091	57.42%	77.53%
	2001	2,980	2,990	1,618	2,264	54.30%	75.72%

Source: Drewry Shipping Consultants Ltd

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THIS publication is jointly issued by The International Association of Marine Aids to Navigation and Lighthouse Authorities with The International Association of Ports and Harbors and The International Maritime Pilots' Association. The co-ordination and administration of the Guide is handled by IALA. The number of ports is constantly updated and added to.

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Hong Kong Port

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Contributions are welcome from ports to be included in the Guide and an estimate of costs will be provided. It is the aim of IALA, IAPH and IMPA to increase the coverage of this valuable international safety at sea publication.

The Secretariat for the administration of the IALA IAPH IMPA World VTS Guide is at:

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ISL:
(Institute of Shipping Economics and Logistics)

Developing Tendencies of German North Sea Ports Until 2015
(ISSN 0724-1232)

Editors: Prof. Dr. Manfred Zachcial,
Christel Heideloff

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- Basic forecasts and potential estimates of traffic developments
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The Americas

AAPA: North American Port Container Traffic

CONTAINER movements through North American ports reached a record 34.6 million TEUs in 2000, up 8.9% from 1999 and nearly double the throughput of a decade ago.

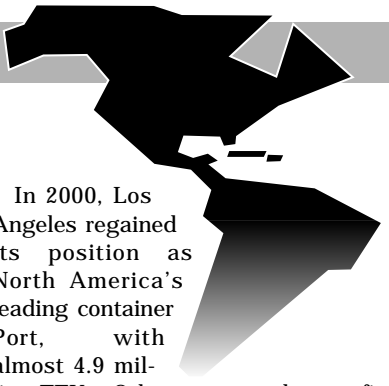
U.S. ports accounted for over 30.3 million TEUs (up 8.8% compared to 1999). However the greatest increases were experienced by ports of Canada (+9.3%) and Mexico, where container traffic last year jumped by 17.1%.

1. North American Port Container Traffic 1991-2000

TEUs,000s

Year	Canada	Mexico	U.S. (*)	Total
2000	2,937	1,308	30,341	34,587
1999	2,695	1,117	27,972	31,784
1998	2,355	1,008	26,161	29,524
1997	2,201	903	24,512	27,616
1996	1,996	682	22,612	25,290
1995	1,744	570	22,323	24,636
1994	1,672	550	20,486	22,708
1993	1,465	464	18,711	20,640
1992	1,379	445	17,269	19,094
1991	1,425	351	16,259	18,035

(*) Includes Guam, Hawaii and Puerto Rico
Source: AAPA Surveys



In 2000, Los Angeles regained its position as North America's leading container Port, with almost 4.9 million TEUs. Others among the top five were Long Beach, New York/New Jersey, San Juan, and Oakland. The top 5 U.S. ports accounted for 54% and the top 10 for 78% of total 2000 U.S. container traffic.

Vancouver and Montreal ranked first and second, respectively, among the ports of Canada, while Veracruz and Manzanillo remained Mexico's leading container ports.

The Port of New York and New Jersey became the third port in the Western Hemisphere to handle over three million TEUs, while Montreal became the newest member of the million-TEU club.

Los Angeles experienced the greatest growth of any single port in 1999, with a net gain of more than one million TEUs, or 27%, compared to 1999.

In percentage terms, the most impressive gains were experienced by the ports of Brunswick, GA (+92%) and Fraser River (+109%).

WORLD PORT NEWS

2. North American Container Ports - 2000 Port Ranking by TEU Throughput

RANK	PORT	COUNTRY	TEUs
1	Los Angeles (CA)	U.S.	4,879,429
2	Long Beach (CA)	U.S.	4,600,787
3	New York/New Jersey	U.S.	3,006,493
4	San Juan (PR)(fy)	U.S.	2,333,788
5	Oakland (CA)	U.S.	1,776,922
6	Charleston (SC)	U.S.	1,629,070
7	Seattle (WA)	U.S.	1,488,020
8	Tacoma (WA)	U.S.	1,376,379
9	Hampton Roads (VA)	U.S.	1,347,364
10	Vancouver (BC)	Canada	1,163,178
11	Houston (TX)	U.S.	1,074,102
12	Montreal (QU)	Canada	1,014,148
13	Savannah (GA)	U.S.	948,699
14	Miami (FL) (fy)	U.S.	868,178
15	Jacksonville (FL)(fy)	U.S.	708,028
6	Port Everglades (FL)(fy)	U.S.	676,760
17	Halifax (NS)	Canada	548,404
18	Veracruz (VC)	Mexico	540,014
19	Baltimore (MD)	U.S.	498,016
20	Honolulu (HI)(fy)	U.S.	461,102
21	Anchorage (AK)	U.S.	432,296
22	Manzanillo (COL)	Mexico	419,480
23	Portland (OR)	U.S.	290,943
24	New Orleans (LA)	U.S.	278,932
25	Palm Beach (FL)(fy)	U.S.	214,890

Source: AAPA Survey

Double digit gainers included the ports of Progreso (+ 38%), Manzanillo(+ 31%) and Ensenada (+ 29%) in Mexico, Halifax (19%) in

Canada, and the U.S. ports of San Francisco (+ 27%), Savannah (+ 20%), Galveston(+ 20%), Honolulu (+ 12%), Gulfport (+ 12%), San Juan (+ 12%), Freeport (+ 13%), Miami (+ 12%), and Palm Beach (+ 12%).

3. North American Container Ports 2000 TOP TEU GAINERS VERSUS 1999

PORT	NET GAIN (TEUs)	NET GAIN (Percentage)
1	Los Angeles(CA)	1,050,578 27.4%
2	San Juan (PR) (fy)	249,077 11.9%
3	Long Beach (CA)	192,307 4.4%
4	New York/New Jersey	177,615 6.3%
5	Savannah (GA)	155,534 19.6%
6	Charleston (SC)	146,075 9.8%
7	Oakland (CA) (b)	113,166 6.8%
8	Tacoma (WA)	105,368 8.3%
9	Manzanillo (COL)	99,910 31.3%
10	Vancouver (BC)	93,007 8.7%
11	Miami (FL) (FY)	90,357 11.6%
12	Halifax (NS)	85,638 18.5%
13	Houston (TX)	72,932 7.3%
14	Anchorage (AK)	64,486 17.5%
15	Veracruz (VC)	55,491 11.5%

Source: AAPA Survey

The white attachment profiles year 2000 container traffic at 69 Canadian, Mexican, and U.S. ports. Note that it includes exports, imports, domestic shipments, military cargo, and empty containers.

(AAPA ADVISORY)

second set, the 2800-TEU Canmar Pride, Canmar Honour and OOCL Belgium, was delivered in 1998 and operates on Route 1.

(AAPA ADVISORY)

Charleston: New Equipment Helps Increase Efficiency

IN its continuing effort to increase the productivity of its facilities, the Port of Charleston has inked a long-term service agreement with TICO/Terminal Service for the lease of 17 yard tractors, which are used to shuttle containers within the terminal.

"The interface between yard and vessel operations is a critical point for overall productivity," said Bill McLean, vice-president, operations. "Leasing, as opposed to buying these units, gives us the flexibility that we need to keep that interface operating efficiently, consistently."

"TICO is a designer of custom equipment supply solutions," said Duncan Pindar, vice-president, TICO/Terminal Services. "As an outsource provider, TICO offers total flexibility in the number of units a customer uses, thereby converting a maintenance activity to an operations process improvement challenge."

Pindar went on to say that utilization-based pricing will enable the port to control equipment costs based on how much and how efficiently the equipment is used. In addition to that flexibility, the downtime on SPA unit will be virtually eliminated by TICO's substitution service. The company maintains a fleet of over 130 units around the Port of Charleston, giving TICO the critical mass needed to be able to offer this exclusive service.

(Port News)

Canada Maritime/OOCL: Receiving 3 ice-reinforced box ships from Daewoo

FOR the third time in seven years, Canada Maritime and Orient Overseas Container Line (OOCL), longterm partners in the St Lawrence Co-ordinated Service (SL CS), have contracted with Daewoo Shipbuilding and Heavy Machinery of South Korea to construct three ice-strengthened and winterised container ships. Each will be 294 meters (965 feet) long and 32.2 meters (105.7 feet) wide, with a draft of 10.78 meters (35.4 feet).

With a loading capacity of 3,500 TEUs, the ships will be larger than vessels previously deployed on the St. Lawrence River. The ships are scheduled to be delivered in 2003. Two will be owned by Canada Maritime and one by OOCL.

Since 1996, SLCS has also been co-operating with Cast, Canada Maritime's sister company. All three lines compete

with each other and with the many other carriers serving the North Atlantic trade.

By cross-utilizing ships, each line is able to offer more comprehensive and efficient service to their respective customers on the three separate Montreal gateway routes, viz:

- Route 1: Link Montreal with Thamesport, Antwerp and Le Havre with ships operated by Canada Maritime and OOCL.
- Route 2: Links Montreal with Antwerp and Hamburg with ships operated by Canada Maritime and OOCL.
- Route 3: Links Montreal and Liverpool with ships operated by Cast.

The three new ships are scheduled to operate on Route 2. They are the third set of three sister ships to be commissioned by OOCL and Canada Maritime for this route under the SLCS cooperative alliance. The first group, the 2,220 TEU Canmar Fortune, Canmar Courage and OOCL Canada, entered service in 1996 and currently operates on Route 2. The

Fraser Port: Board Elects New Chair

THE Fraser River Port Authority announces that the Board of Directors elected a new Chair and Vice Chair at their May 17, 2001 meeting. Mr. Mike Jones was elected Chair. He has been on the Board since 1991 and served as Chair between 1994 and 1999. He is a retired professional engineer with 35 years of experience in both public and private sectors.

WORLD PORT NEWS

Mr. Mel Nunweiler, who is serving his first term on the Board, was appointed Vice Chair. He is a forestry executive with more than 30 years of experience in forest products, industry liaison, and policy development.

The Board has seven members with two pending appointments at this time. The other directors are Geoffrey Day, Fred Mah and Ms. Juliana Yung.

Georgia Ports Authority (GPA): World class autoport sees another record year

COLONEL's Island Terminal offers automobile manufacturers worldwide numerous advantages for transporting vehicles via the Port of Brunswick. The terminal features abundant land for the processing and storage of automobiles in conjunction with superior interstate and rail connections.

The presence of three international auto processors, AMPORTS, Atlantic Vehicle Processors, Inc. and International Auto Processing, Inc., offers customers a wide range of auto processing and distribution services ranging from total refurbishment to mechanical and cosmetic enhancements for import and export vehicles.

"These are just a few reasons why Colonel's Island Terminal is considered one of the most efficient and competitive auto facilities in the U.S.," stated GPA Director of Trade Development Byron X. Hock. "During Calendar Year 2000, more than 204,000 units were imported or exported via water and over 35,800 units were imported via CSX Transportation from Mexico. Current projections indi-

cate that auto movement via the terminal will increase to more than 241,000 units in CY 2001."

The Colonel's Island Terminal auto facility includes 300 acres of improved land and two berths. A third berth is under construction and is scheduled to be operational during the second quarter of 2001. In addition, the terminal is poised for significant growth in the future with more than 1,100 acres presently available to support further development of the automobile import/export trade.

Eight prestigious steamship lines, American Roll On Roll Off Carrier, LLC., Hual North America, Hyundai Merchant Marine, "K"Line, Mitsui O.S.K. Lines, NYK Line, VW Transport and Wallenius Wilhelmsen Lines, currently provide service to various destinations located worldwide. More than 10 auto trucking lines service Colonel's Island Terminal which include Allied Systems, Auction Transport, Auto Elite, Centurion Auto Transport, Commercial Carriers, Fleet Car Carriers, Jack Key Auto Transport, Legion Transportation, Inc., Sunbelt Auto Carriers, Inc. and Waggoner Trucking.

Automobile manufacturers utilizing the terminal for inbound services include, Audi, Hyundai Motor America, Jaguar Cars, Land Rover North America, Inc., Mitsubishi Motor Sales of America, Saab Cars U.S.A., Inc. and Volkswagen of America, Inc. Outbound auto shippers include Ford Motor Company, General Motors Corporation and Mercedes Benz. American Auto Logistics, Inc. imports and exports vehicles for the U.S. Government's Military Traffic Management Command via Brunswick.

In addition to the auto units transported via Colonel's Island Terminal during

CY2000, the terminal also hosted machinery manufacturers such as Bomag, C&H, CLASS KGaA, Deere & Company, F.M.C., J.C. Bamford Excavators and Komatsu America International Company.

Future plans call for Brunswick's harbor to be deepened from its present depth of 30 feet to 36 feet at mean low water. In addition, construction of the new Sydney Lancer Bridge is scheduled for completion in the fourth quarter of 2001. The new high level, fixed span bridge will provide port users with 185 feet of vertical clearance at mean high water and unrestricted horizontal clearance.

For additional information about terminal specifications and services, contact GPA Manager of Special Commodities and Projects William (Bill) J. Jakubsen at (800)342-8012 or (912)964-3811, ext.3824.

(GEORGIA ANCHORAGE)

GPA/Sydney Port: Renewing Partner Ports Agreement with Sydney Port Corp.

MEMBERS of the Georgia Ports Authority recently met with officials of the Sydney Ports Corporation in Sydney, Australia to formalize the renewal of a Partner Ports Agreement that was initially signed in March, in Sydney and ratified on July 22, 1996 in Savannah, Georgia.

On March 7, the parties agreed to renew their Partner Ports Agreement and reaffirm their work together to benefit one another for the next five years. "During the past five years, we have witnessed extensive growth in terms of the volume of trade handled via the Port of Savannah and Sydney," stated GPA Executive Director Doug J. Marchand. "Through the renewal of the agreement, the port partners will continue to strengthen international trade and economic prosperity, encourage investment and trade and provide an avenue for exchanging information concerning port operating procedures, organizational and management systems, technology applications, cargo handling expertise and engineering techniques."

"During the past five years, we have witnessed extensive growth in terms of the volume of trade handled via the Port of Savannah and Sydney."



Doug J. Marchand
GPA Executive Director



WORLD PORT NEWS

Montreal: Raymond Massi (Québec) appointed to the board of MPA

TRANSPORT Minister David Collenette recently appointed Raymond Massi of Mont-Royal, Québec, to the board of directors of the Montreal Port Authority, effective March 23.

Mr. Massi, who received his Bcomm from Concordia University in 1975, has extensive experience in finance, most recently as a partner with the firm of Richter, Usher and Vineberg.

Prior to this, he held various positions with KPMG and with Gestion Rescap Inc., an affiliate of Power Financial Corporation, as executive vice president.

Prince Rupert: Chairperson & President's Report

THE year 2000 was a sobering reminder for the Port of Prince Rupert that the lingering challenges of the old millennium will continue to impact our operations and finances with greater intensity than the anticipated promises of the new millennium. Year-end results reflect the continued rapid deterioration in the Port's traditional resource-based activities, and at the same time reinforce the need to diversify into new business activities that offer higher growth prospects. In 2000, the pace of decline in traditional traffic exceeded our ability to alter course and chart new waters.

Three events highlighted the deterioration of our traditional traffic base: the September closure of the Quintette coal mine; the May elimination of ocean carrier service for Fairview Terminal's pulp customers; and the significant delay in the start of Canadian Wheat Board shipments through Prince Rupert Grain accumulated to create substantial declines in volumes and revenues for the Port Authority.

While these events have had an immediate and negative impact on the Prince Rupert port community, we are seeing signs of important progress in our diver-



Rhoda Witherly
Chairperson

Don Krusel
President & CEO

sification efforts. Following the Port Authority's development of a pocket cruise float in 1999, cruise calls have increased by 120% at the facility, and are expected to rise another 50% in 2001. With the completion of the new Atlin Cruis Terminal development on the waterfront, and the signing of a Memorandum of Understanding with the City of Prince Rupert to jointly investigate the development of a new conventional cruise vessel dock, we expect to be a major player in this growing sector by 2003/4.

The Port Authority has intensified its efforts to introduce containerized traffic to Fairview Terminal. Active discussions are taking place with the railroad and a number of container lines in anticipation of moving forward on this important initiative. With a projected capital expenditure requirement of up to \$60 million, the Port Authority recognizes the need to involve private and public partners.

Our 400 hectare/1000 acre industrial property on Ridley Island is a sterling advantage in the Port's efforts to diversify our economic base. We welcomed the Sulphur Corporation of Canada's announcement late in the year to commence construction of its molten sulphur facility on Ridley Island. The first shipment is expected to move over the property in the fourth quarter of 2001. For several years, Pacific Iron & Steel Products has been working persistently to develop a steel slab mill on the property, and a number of other industrial developers are investigating the site for promising initiatives. With a multitude of properties designated for light to heavy industrial development on tidewater, the Prince Rupert Port Authority is working aggressively to further develop the port and capitalize on the inherent strategic advantages of the gateway and the entire northwest transportation corridor.

With these encouraging prospects and developments, the Prince Rupert port community faces the current challenges with the conviction that the new millennium will allow the Port of Prince Rupert to capitalize on its fundamental geographical advantages to build a prosper-

ous future.

We acknowledge the steadfast commitment and dedication of those individuals who are our true advantage: the Port Authority employees; the longshore workers; the management and staff of our many terminal owners and operators; and those who labour within our service providers. We also thank our dedicated Board of Directors and especially the valuable contributions of Michael Shaw and Peter Lester whose terms expired in 2000. We also welcome Michael Tarr and Brian Mitchell as new directors of the Prince Rupert Port Authority

Seattle: Cruise Traffic

FIFTY sailings are scheduled from the Port of Seattle's Bell Street Pier Cruise Terminal this year, up from 36 in 2000, when the 67,000 square-foot facility opened for business.

Since then, the terminal has undergone second phase construction, which includes a hospitality corridor with the Bell Harbor Piazza, a soup, salad and sandwich café, plus retail kiosks featuring Washington state products, two concierge stations, a staircase leading to the passenger embarkation area, and an all-weather canopy.

Port of Seattle
CRUISE TRAFFIC

CY	Passengers	Vessel Sailings
2001(*)	170,000	n/a
2000	119,002	38
1999	6,615	5
1998	8,783	13
1997	7,152	11

(*) Forecast

Source: Port of Seattle, www.portseattle.org

Two of the world's newest cruise ships will be homeported at Seattle this season. Royal Caribbean International's 2,100-passenger *Radiance of the Seas* will offer 16 three-and four-night sailings through the Pacific Northwest, with stops at the Canadian ports of Vancouver and Victoria, British Columbia.

The first sailing will be April 30, with seven more springtime sailings scheduled through May. *Radiance of the Seas* returns to Seattle in mid-September for eight more Pacific Northwest cruises.

Norwegian Cruise Line's *Norwegian*

WORLD PORT NEWS

Sky returns to Seattle for 22 round-trip sailings to Southeast Alaska, beginning April 29 and continuing through September 23. Last year, *Norwegian Sky* became the first modern cruise ship to be homeported in Seattle.

(AAPA ADVISORY)

Seattle: Hanjin Shipping of S. Korea renews terminal lease agreement

HANJIN Shipping Company has renewed its commitment to the Port of Seattle by signing an amendment to its lease agreement that extends the term by 10 years, with a one-time option for an additional five years. Hanjin, which has been in Seattle since 1979, currently occupies 60 acres at Terminal 46 and will immediately increase its operations to 70 acres, then to 88 acres in 2004.

The lease amendment also commits the Port to investing approximately \$50 million in improvements to T-46, including new truck gates, three new container cranes, yard improvements, and a new administrative building.

According to the Port, Hanjin's expanded cargo operations will result in increases of more than \$83.5 million annually in area business revenue, \$13.5 million in local purchases, and more than \$4.8 million in state and local taxes.

Images of Hanjin's Seattle terminal can be downloaded from www.ivey.com/Ivey.POSView.

(AAPA ADVISORY)

Tacoma: Gets final permit for extension of Maersk Sealand pier on Sitcum Waterway

ON April 18, the Port of Tacoma received the final permits necessary for the 600-foot extension of the Maersk Sealand pier at the Maersk Pacific Limited Terminal on Sitcum Waterway. Maersk Sealand, one of the Port's largest container shipping line customers, calls at this terminal as does CSX Lines, which serves Alaska.

When first built for Sea-Land in 1985, the pier was 1,600 feet long. The extension project will bring the total length of the pier to 2,200 feet.

The extension is needed to better accommodate the large post-Panamax ships that Maersk Sealand brings to the Tacoma facility. Maersk Sealand's 1,138



Port of Tacoma

foot-long ships, the largest container ships calling in North America, call at this terminal.

These vessels, with container capacity of more than 6,600 TEUs, are usually at berth concurrently with the smaller CSX Lines vessels. When this occurs at the existing pier, the vessels extend beyond the pier and must be relocated or repositioned during loading and unloading operations, reducing the effectiveness and efficiency of the terminal operation.

The pier extension will allow the Maersk Sealand and CSX Lines' vessels to be berthed alongside the pier and worked simultaneously, providing increased efficiencies to the facility.

The cost for the pier extension work is estimated to be between \$8 million and \$9.5 million. The project is expected to be completed by the end of the year.

(AAPA ADVISORY)

Tacoma: Port Sells Land to Power Plant Developer

MORGAN Stanley Capital Group has purchased 17.31 acres of land from the Port of Tacoma and plans to build a 324-megawatt, gasfired, electrical generation plant on the site.

The sale was approved by the Port of Tacoma Commission on Thursday, June 7. The property is located at the Port's Frederickson Industrial Area. Morgan Stanley's offer of \$2.83 million was one of six bids the Port received.

"We'd like to begin work as soon as possible," said Morgan Stanley's Jim North. "Construction time is in the range of about six months once we begin grading the site," according to North. "Our goal here is to work with

Tacoma Power and get interconnected with the grid as soon as possible."

The project entails an investment of \$90-100 million and will create about 100 construction-related jobs. Once fully operational, the plant will employ about 10 people.

The plant will use jet turbines, fueled by natural gas, to generate power. Frederickson's industrial zoning and industrial capacity utilities helped attract Morgan Stanley to the site. A natural gas main runs through the Port's Frederickson property.

"We're very happy to be able to provide a site for a project that will increase the amount of electrical energy available to our community," said Port of Tacoma Commission President Connie Bacon. "This will help keep our economy and business climate on track."

"It's encouraging to see a company of Morgan Stanley's caliber make an investment in our community," said Port Commissioner Clare Petrich. "This project will create jobs, provide needed electrical generation capacity, and generate cargo for the Port. It's an ideal situation," said Petrich.

Vancouver (BC): New cruise ships/passenger facilities highlight start of this year's cruise season

NEW cruise ships and new facilities for passengers at Canada Place highlighted the start of this year's cruise season at Port Vancouver on April 30, with the arrival of Norwegian Cruise Line's Norwegian Wind.

In total, 26 vessels from 13 cruise lines will make 328 sailings this year.

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While the number of sailings this year is down slightly from last year's 336 sailings, the projected number of revenue passengers is expected to remain constant.

Port Vancouver has two cruise ship terminals: Canada Place, currently with two operational berths, and Ballantyne Pier, also with two berths.

The Canada Place cruise terminal is currently undergoing construction at a cost of C\$89 million for facilities and infrastructure that will substantially expand space for passengers, baggage handling and enhance access for taxi, bus and truck traffic., and add a third berth.

(AAPA ADVISORY)

Veracruz: Doubling port capacity and infrastructure by 2010

THE Port of Veracruz on the Gulf Coast of Mexico has decided to undertake a major improvements and expansion program with the prime objective to double port capacity and infrastructure by the year 2010. In order to accomplish this task, the port will make the following improvements to the current port facility:

- Deepen the channel
- Dredge the piers
- Add a multi-use terminal for automobiles and containers
- Construct an administration building
- Construct installations for Maritime Custom use
- Construct additional facilities for bulk agricultural products, containers, and automobiles that will necessitate the building of new roads, tracks for independent rail lines into the port, and purchasing equipment for a multipurpose pier.

Also planned are a warehouse for storage of foods to be exported, a warehouse for the storage of dangerous merchandise, and the establishment of a dry-dock to support receiving cargo. The port authority, API de Veracruz, plans to attract capital by using the BOT (build, operate, transfer) investment scheme.

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(AAPA ADVISORY)

Africa/Europe

ABP-Hull: New Passenger Terminal

THE Rotterdam Terminal, a new state-of-the-art passenger terminal at Associated British Ports' (ABP) Port of Hull, was officially opened by Mrs. Darral Fell today, (Tuesday, 1 May) at an inauguration ceremony hosted by Bo Lerenius, Group Chief Executive, Associated British Ports Holdings PLC, and Mike Fell, Port Director, Hull & Goole.

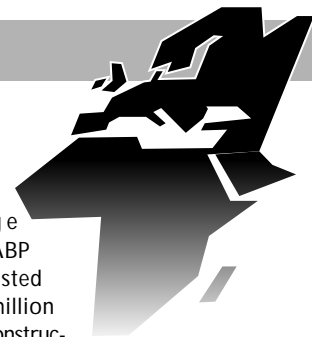
The Rotterdam Terminal has been built on the back of a long-term agreement with P&O North Sea Ferries, and accommodates the world's largest cruise ferries operated by P&O North Sea Ferries on the Hull-Rotterdam crossing. The first of these vessels, *Pride of Rotterdam*, made her maiden voyage from Rotterdam on 30 April 2001, arriving at the Port of Hull in time for the inauguration of The Rotterdam Terminal. The second vessel, *Pride of Hull*, is currently under construction at Italian shipbuilders Fincantieri, and is scheduled to join the service, which is used by some one million passengers a year, in November.

Commenting on the opening of The Rotterdam Terminal, Bo Lerenius said:

"The opening of The Rotterdam Terminal further consolidates the valued relationship that we have with P&O North Sea Ferries - a relationship that, at the Port of Hull, began over 36 years ago. This latest agreement, which takes our relationship well into the first quarter of the 21st Century - and, hopefully, beyond - is particularly pleasing to me, as it is an excellent example of ABP's growth strategy in action. The Rotterdam Terminal is an investment that has been made against a long-term agreement with a blue-chip customer, and to reach this stage has taken vision and commitment from both parties. I would like to thank P&O North Sea Ferries, which has itself made a substantial investment in these new vessels, for its continued faith in ABP and the Port of Hull."

At 59,925 gross tonnes each, the cruise ferries are too wide to pass through the lock at Hull. Consequently, The Rotterdam Terminal, which has been designed in conjunction with P&O North Sea Ferries, has been constructed to provide berthing facilities on the River Humber adjacent to Hull's King

George Dock. ABP has invested £14.3 million in the construction of this new terminal, together with associated riverworks.



ABP - Southampton: Contract Signed to Build First Multi-Deck Car Terminal in UK

GLOBAL automotive logistics carrier Wallenius Wilhelmsen sealed today (Thursday, 26 April) an historic 10-year deal with Associated British Ports (ABP), to build the UK's first port-located multi-deck car terminal at ABP's Port of Southampton.

In a ceremony on board his company's PCTC (pure car and truck carrier), MS MANON, Bjørn O Tønsberg, President Region Europe, Wallenius Wilhelmsen, signed an agreement with ABP represented by Andrew Kent, Port Director for Southampton, to start work on a £3 million (US\$4.3 million dollars) car-handling terminal in Southampton's Eastern Docks.

The new multi-deck facility at Berth 34 will occupy a footprint of approximately one hectare, providing almost five hectares (11.75 acres) of storage on five levels. It is expected to be completed by the end of the year and provide storage for up to 3,120 cars that, together with existing storage areas, will increase Wallenius Wilhelmsen's car-handling capacity from 205,000 to 357,000 vehicles per annum. "Four of the decks will be covered to afford greater protection for vehicles from the elements," a spokesperson for the carrier said.

Wallenius Wilhelmsen expects to handle up to 130,000 units through the new facility in its first year of operation, of which 20,000 will be imports. Car makers will have online access to information about their vehicle shipments.

As part of the deal a dedicated terminal for cars and a separate high and heavy RoRo area is provided in the Eastern Docks for Wallenius Wilhelmsen's use.

Bjørn O Tønsberg said: "Our agreement with Associated British Ports will help ensure that our automotive cus-

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tomers gain access to the latest car-handling solutions in Europe. The new terminal in Southampton represents a major development for Wallenius Wilhelmsen in the UK, one of our most important markets in Europe, for the import and export of cars."

Andrew Kent remarked: "As the largest automotive port in the UK, Southampton has continually kept ahead of customer needs for quality and efficiency. This latest facility - a first in the UK - underlines ABP's commitment to handling growth in business expected over the next decade."

Craig Jasienski, Managing Director for Wallenius Wilhelmsen UK, said: "The new facility will provide us with enough terminal capacity to cater for the growth of our customers' export programmes well into the next decade."

The terminal will incorporate the latest car-handling safety feature and computer technologies, such as a bar-coding system that will scan cars as they enter the terminal and help offer tighter controls over inventory. Padded stancions, high-grade lighting and a one-way traffic flow system will be incorporated into the terminal's design to minimise the risk of damage to vehicles and enable Wallenius Wilhelmsen to maintain the exacting global car-handling standards required by today's automotive industry.

Algeciras: Bay Administration Board sanctions Isla Verde Quay box terminal concession to INGER

THE Port Authority of Algeciras Bay Administration Board has adjudicated the commercial development of a container terminal on Isla Verde Quay to *Ingeniería y Gerencia SA (INGER)* last Friday. The *Acciona SA* and *Terminales Maritimas Layetanas (TC Group)* companies have a 60% and 40% participation, respectively, in INGER and forecast an annual throughput of between 670,000 and 870,000 TEUs for the latter period of the concession. The concession has a 15-year duration, with a 5-year optional extension.

The terminal itself has an 18-hectare surface area and INGER is to install 7 post-Panamax cranes, as well as 11 transtainers, along the length of its 675-metre quayline during INGER's commercial development of the concession. INGER also plans to invest more than £54 million (9,085 million pesetas) and this public terminal is due to enter service within one year's time.

Antwerp: Grimaldi inaugurates terminal in Verrebroek Dock

EURO-Med Service "Grande Mediterraneo" became the first ship to be handled at Grimaldi's new terminal facilities in the Verrebroek Dock on the Left Bank. The Italian company operates the new Antwerp Euroterminal under a joint venture agreement with Mexico Natie, which hitherto handled the ship of the Euro-Med Service at its terminal at berth no.9 on the banks of the Scheldt.

In the first phase of development Grimaldi will occupy a 20-ha concession on the west side of the Verrebroek Dock. Apart from the Euro-Med Service to the Mediterranean basin, the terminal will also handle a new trade consisting of Fiat cars shipped from Italy to Belgium and the Netherlands. Until now this trade was carried by road.

A second phase of development should become operational in early 2003, and will entail the addition of 45 ha of adjoining land to the terminal.

(Antwerp Port News)



The "Grande Mediterraneo" was the first car carrier to be handled at "Antwerp Euroterminal".

Antwerp: Celanese Chemicals attracted to Antwerp

Germany's Celanese Chemicals, a producer of commodity chemicals for industrial applications, has decided to move its West European distribution operation for the chemicals it produces in the US, Mexico and Singapore from Rotterdam to Antwerp. To this end Celanese has signed a long-term contract with tank storage operator

ADPO, which will come into effect in the fourth quarter of this year. ADPO is to build a dedicated tank farm and jetty for Celanese products on Antwerp's Left Bank. The facilities will comprise 40 new tanks with an overall capacity of 60,000 m³. Half of these tanks will be of stainless steel. The incoming trade will come to 500,000 tonnes a year and consist mainly of acetyls and acrylates. Celanese's products will be landed and stored at ADPO. The bulk of the goods



ADPO will invest BFE 1.2 billion (€29.75 million) in a new tank farm and jetty.

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will be distributed by canal and road, even though there will also be a role for the railways and for maritime forwarding. The bulk of the incoming chemicals will be sold in Western Europe, although some will also travel as far as to the Middle East and North America.

Apart from the considerable logistic advantage of the inland position of the Port of Antwerp and its excellent transport infrastructure, the attraction of the cluster of chemical activities in Antwerp proved to be irresistible to Celanese.

(Antwerp Port News)

Barcelona: Multipurpose Vehicle Terminal

AUTOTERMINAL is the multipurpose terminal for vehicles of Barcelona Port. Specifically created to this end, the terminal is responsible for loading and unloading vehicles from vessels, trucks and trains. Autoterminal initiated its activity in 1991 and currently has an administrative concession of Barcelona Port until February 2020.

The terminal is 705,000 m² in area, 270,000 of which are covered with two vertical four-floor warehouses for vehicles. The first one was built in 1996 and the second was finished in July 2000. Warehousing quality has improved substantially, going from 7,500 to 15,000 covered parking spaces.

The accumulated investment of Autoterminal during these years has been, 3,780 million pesetas, 2,850 of which are to build two vertical vehicle warehouses.

The main clients of Autoterminal include Nissan, Daewoo, Mitsubishi, Peugeot, Citroen, Mazda, Renault, Opel, Honda and others, handling a total of 372,000 vehicles during 2000.

Beside offering the essential services of a vehicle terminal, including 680m of exclusive berth and 430 alternative meters and 2 terminals for trains with capacity for three trains simultaneously, it offers ancillary services to deliver the vehicles in perfect conditions, including:

- Uncoating vehicles with an automatic tunnel that eliminates the copolymer coat applied by the manufacturers on the vehicle surface.
- De-paraffin the units through four manual boxes of high pressure to eliminate the protective paraffin coat.
- Repairing body and paint of vehicles



in a 1,500 m² workshop with three cabins to paint and dry, one of them for trucks, and nine preparation areas to repair the damages caused during the transport of the units.

- Assembling accessories and personalizing vehicles in a 3,500 m² workshop for special operations, including radio installation, CD, GPS, air conditioning, tire change, etc., beside electric and mechanic repairs.
- Operations of PDI, direct pre-deliver to the client, where they check all mechanisms of the vehicle, levels, safety mechanisms, etc. to ensure correct functioning of the units before being delivered to the final client.

Autoterminal is 51% part of the railroad company LTF (Logística y Transporte Ferroviario), along the carrier company Sintax, S.A., specialized in vehicle railroad transport.

Currently, it offers five weekly departures connecting Barcelona with the concessionaires of central Spain in less than 24 hours, regular trains to Santander and to south Spain (Granada). Also there is a regular service to connect Barcelona with a port in northern Europe in project.

Autoterminal obtained the quality certificate ISO 9002 in December 1994 and in July 1996 the government of Catalonia gave the terminal the award to industrial quality, confirming their philosophy of "things done right" reaching all components of the human team.

For about three years, an environment management program was launched, based on the international norm ISO 14001, ending in September 1999 by obtaining the environment certificate conceded by the certifying company Det

Norske Veritas. The most important improvements include the building of a water purifying plant with paraffin coming from the manual tunnel, selective picking of residues generated by the company and the plant to recover water from the automatic cleaning tunnel, with 50% water savings.

The main projects developed in 2000 include the inauguration of the second vertical warehouse, data transmission by radio frequency, that will allow to improve reliability and fast information, and the connection of clients to the data base of Autoterminal to seek information of their units through the project called "Crystal Internet."

(PORTNEWSPAPER)

ESPO: EU "Port Package"

Sound Principles, Concerns About Concrete Impact

THE European Sea Ports Organisation published on May 9 2001 its initial evaluation of the European Commission's Communication "Reinforcing Quality Service in Sea Ports: A Key for European Transport," which is also known as the "port package."

ESPO takes the view that the "port package" and notably the Directive proposal on market access to port services, are based on a number of general principles, which are sound and beyond any discussion, such as:

- free and non-discriminatory access to the markets of all port services for which the customer has to pay separately;
- principles of "good governance": full transparency of all procedures in rela-

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tion to the provision of port services as well as the availability of appeal procedures and a judicial review;

- neutrality of port authorities toward port users;

ESPO's first assessment of the measures proposed by the Commission to implement these basic principles does however raise substantial concerns, notably with regard to :

- the balance between legal certainty and subsidiarity (room for local autonomy);
- the proportionality of the measures concerned (in relation to the actual "obstacles" encountered in practice);
- the vagueness of some of the crucial concepts.

ESPO's initial evaluation does not make any concrete recommendations yet to amend the proposals contained in the "port package." These will be held during the month of May and should be ready in early summer.

ESPO will furthermore be organising a public seminar on the "port package" and EU seaport policy in general. This will be held on Thursday, October 11 2001 in the presence of Loyola de Palacio, Vice-President of the European Commission.

<http://www.espo.be/press3.html>

Helsinki: Environmental operations' area of emphasis for the year 2001

THE Port of Helsinki operates according to an ISO 14001 standard-compliant environmental system that went into effect 8 December 2000. The system includes the Port of Helsinki's Environmental Programme for the year 2001.

When assessing the environmental impacts of its own operations, as well as the operations of other harbour operators, the Port of Helsinki has identified the following significant effects: dust emissions, waste disposal, energy emissions - particularly dioxide - and ground pollution. In the Environmental Programme, plans of action for 2001, as well as additional guidelines for those responsible for environmental matters, have been formulated for these issues.

Dust emissions had an adverse effect on human health, machines' wear and environmental attractiveness. The City of Helsinki Public Works Development, responsible for the port's sanitation, has

developed new dust removal techniques. The Port of Helsinki also improves dust binding through such means as planting.

A particle filter that will remove diesel particles from the harbour's low-lying air layers will be installed at the North Harbour's diesel-powered LH400 container crane. The Port of Helsinki is also recommending equivalent procurements for the harbour's other operators.

The processing of dry waste will focus on more exact sorting, facilitating the separation of combustible materials that can be recycled as an energy source.

Particular attention is being paid to the prevention of ground pollution. Various fuelling operations, as well as the storage of chemicals, will be subject to stricter controls. Other harbour operators' locations will be inspected within the framework of leasing agreements supervision.

The port of Helsinki will continue to utilise sulphur-free fuels in its own working machinery, simultaneously encouraging other operators at the harbour to follow its example.

Employees' environmental responsibil-

ities are being developed by supplementing the Environmental Programme's guidelines as well as by the arranging of environmental reviews at job locations.

Every attempt is made to maintain attractive surrounding and landscape value in centralised harbour areas.

To promote the protection of the Baltic Sea area the port of Helsinki co-operates actively with the European Sea Ports Organisation, the Baltic Environment Protection Commission and Baltic Ports Organization. Special focus areas include the treatment of ships' oily wastewater as well as the treatment of all vessel-generated waste.

Businesses operating at the harbour are encouraged to become actively involved in environmental issues. The port of Helsinki monitors the overall effects of harbour operations and its "Service Handbook 2001" provides environmental guidelines and recommendations regarding air and water protection, noise pollution reduction and waste management.

(Port of Helsinki)



INTERTANKO:

• Ships to carry 'black boxes'

AT its 73rd Session in December 2000 the IMO Maritime Safety Committee (MSC 73) adopted mandatory regulations to require ships to carry voyage data recorders (VDRs). The regulations will come into force on 1 July 2002 and all new ships built on or after that date will have to be fitted with VDRs, commonly known as 'black boxes'. Existing passenger ships and ro-ro ships will also be required to fit VDRs, while a study will be carried out to examine the need for mandatory carriage of VDRs on existing cargo ships, including tankers. This study is due to be completed by January 2004. Performance standards for VDRs were adopted by IMO in 1997 and, currently,

ships are recommended but not required to carry these devices. VDRs enable accident investigators to review procedures and instructions in the moments before an incident and help to identify the cause of any accident.

• Transponders for new and existing tankers

THE new requirements for voyage data recorders are contained in the revised Chapter V of the IMO Safety of Life at Sea (SOLAS) Convention, dealing with the safety of navigation. Also included in the revised Chapter V, which was adopted at MSC 73 in December 2000, are new requirements governing shipboard transponders. The provisions will make it mandatory for ships to carry an automatic identification system (AIS), or transponder, thus

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enabling the ship's identity and other details to be given to the shore and other vessels automatically. AIS will become mandatory for new ships from 1 July 2002, while existing tankers will be required to fit AIS not later than their first safety equipment survey after 1 July 2003.

• Channel ship reporting system adopted

AT its 73rd Session in December 2000 the IMO Maritime Safety Committee (MSC 73) adopted a new mandatory ship reporting system which was prepared to make it easier to track and communicate with ships in the central English Channel area. The scheme, which was prompted by the sinking of the tanker Erika off the west coast of France in December 1999, at Ouessant and Pas de Calais. The new measures take effect on 1 June 2001. Mandatory reporting systems provide coastal authorities with information about ships, including their identities and cargoes, which otherwise they would not have. The new system, called MANCHEREP, will help improve safety, navigational efficiency and environmental protection in and around the traffic separation scheme operating off Les Casquets.

(THE TANKER Newsletter)



Barges are towed out of BACO Line 2 at the Port of Tilbury

into 60-kilo bags and handled conventionally.

The move towards bulk handling was made by using ventilated containers until the change to barge traffic allowed larger tonnages in mega-bulk vessels - with the entry of the BACO Liner vessels - to compete in this market.

John Clark, of CN Shipping, said: "We expect the total tonnage of cocoa beans shipments to reach 25,000 tonnes this year. We also carry general cargo and 3,000 tonnes a month of animal feed for Tilbury delivery."

While BACO vessels are kept busy during the cocoa season with full ships, the line also carries other bulk cargoes out of season to London and European ports.

This is because the BACO Liner vessels give great flexibility in the market place.

CN Shipping has been agent for the BACO liner since the line was started in 1979.

The company continued looking after BACO Liner interests when the line transferred to Tilbury in 1986.

PLA: Bulk Cocoa Beans

Now Carried on BACO Ships

A new service at Tilbury involves cocoa beans in bulk being carried in BACO barges floated out from the 'mother ship'.

A number of successful consignments have been delivered - and this new method is now accepted as a regular way of transporting this commodity. The latest 3,000-tonne shipment was brought from Ghana by BACO Liner 2 to the Port of Tilbury where six barges were floated out and towed to No. 34 berth for discharge.

The barges were then discharged over the quay into a self trimming bulk lorry and taken to 34a shed for storage - from where customers can pick up loads in their own lorries and deliver to their factories.

"The cocoa beans are destined for the chocolate industry," said Peter Mann, of agents CN Shipping. "More and more customers are opting for bulk shipments and with each barge carrying 500 tonnes, this is of enormous benefit for the trade."

In the past, cocoa beans were packed

Rotterdam: Maritime Group assists Port of Rijeka

THE Rotterdam Maritime Group (RMG), a group of maritime companies in the Rotterdam region, has concluded a contract with the World Bank to assist the Port of Rijeka in Croatia. The aim of the project is to transform the Port of Rijeka into a port which can compete on market-oriented transport markets and to make the port companies of interest for private by reducing governmental influences.

The Port of Rijeka is the principal port of Croatia. Since the country's independence the Government of Croatia has started to take steps to improve the port efficiency and tried to regain traffic, but still a lot of additional measures have to be considered. The present port management and stevedoring organisations have to be restructured taking into account a port administration based on western models such as the landlord

port model. The operational productivity has to be enhanced as well as the financial performance has to be improved. Plans have to be made for the upgrading of the port facilities and for linking the port with the hinterland transportation networks. Moreover as the port is located at the boundary of the sea, a balance need to be found between port and urban development plans.

The awarding of the contract was based on RMG's reputation at the World Bank and RMG's experience in Croatia built up during former consultancy contracts for the World Bank and those assigned by the Dutch Government (SENER). Based on the advice of RMG, the Port of Rijeka Authority could compile an investment programme. This programme was approved by the Ministry of Transport and forms the basis for the present port policy, aimed at introducing improvements in the Port of Rijeka.

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TT Club, TT Club and GE SeaCo jointly stimulate intermodalism in CIS & Baltic States

NOWHERE in the world is there greater potential for the transportation of containers by rail than in the countries of the former Soviet Union (FSU). Distances are huge, the terrain is often hostile, especially in winter, and there is an established rail network which, whilst in need of upgrading and expansion, performs reasonably satisfactorily. However, the development of intermodalism has been hampered by a lack of suitable containers available to would-be service providers. Now though, GE SeaCo and the TT Club have launched a new joint initiative designed to address this problem, making modern container equipment more available throughout this vast region.

In former times, the railroads of the USSR and neighbouring Eastern European and Central Asian states operated a form of container pooling with interchange agreements that did not provide for close tracking of equipment. Responsibility for damage to equipment too was difficult to apportion. In such an environment, it was not surprising that the major commercial leasing companies were reluctant to become involved and because there appeared to be little improvement in the situation 'post perestroika,' they are still largely absent from this market. Consequently, the increasing demand for modern container hardware is going largely unfulfilled.

The lack of a modern container logistics system is however being addressed and now appearing on the scene are several intermodal operators with structures that will allow them to maintain much tighter control of their operations. Recognising this, GE SeaCo and the TT Club have formed an alliance to train and support prospective lessees and, where the operations meet set criteria, GE SeaCo is now offering to lease modern equipment including, where required, state-of-the-art reefer boxes and tank containers.

One of the first intermodal operators to benefit from this new alliance has been the Latvian company Sun Gate. Alan Wilkins of the TT Club explains the background:

"Sun Gate had been introduced to the TT Club by one of our existing members, a major ocean carrier. This company had wanted to subcontract the rail movement of deepsea containers between Riga and Moscow to Sun Gate but wanted to be sure that the Latvian company had adequate liability insurance cover.

"Together with the ocean carrier concerned, we looked at Sun Gate's operations and after making a few recommendations, we were able to quote Sun Gate terms which were acceptable to it."

This operation has proved a success and Sun Gate is now moving boxes on behalf of a number of deepsea carriers. However, the company also wanted to exploit the potential for intermodal movements between Latvia and various parts of the CIS. Alan Wilkins explains:

"Subsequent discussions between ourselves and Sun Gate revealed Sun Gate's ambition to carry cargo between Latvia and distant parts of the CIS rather than just be a carrier of maritime boxes. The stumbling block though was the complete lack of lessors prepared to provide containers for use in this region.

"Recognising that Sun Gate's President, Nikolay Semjonov, and his team had established a sound operation, we approached GE SeaCo, a longtime member of the TT Club, on Nikolay's behalf and asked if they would be prepared to help.

"To put it simply, GE SeaCo said that if we were happy to insure any equipment that they leased to Sun Gate, then they would certainly be prepared to talk terms with Nikolay."

John Keir of GE SeaCo continues the story:

"GE SeaCo was all too well aware of the potential market in the CIS and Baltic States but we were also wary. However, this pilot project with Sun Gate has enabled us to work out a strategy with the TT Club which addresses the major problems.

"At the heart of the scheme is a programme whereby we have set up courses to train the staff of would-be lessees in order to ensure that our equipment, including reefer units, is well-maintained whilst in the care of lessees. Those engineers who complete the training programme are issued with GE SeaCo/TT Club certificates as proof of their competence."



The Latvian company Sun Gate is benefiting from a new initiative launched by the TT Club and GE SeaCo which is enabling the company to lease modern container equipment including tanks and reefers for freight movements between the Baltic States and the CIS.

Shown here is one of Sun Gate's trains departing from the company's terminal in the Port of Riga. The seventh car in the train provides power to the reefer units and accommodation for a travelling crew of trained engineers.

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Asia/Oceania

Auckland: Container Crane to Move over 2KM in Major Reconfiguration

WORK began at Ports of Auckland today on the relocation of Axis Fergusson container terminal's northernmost gantry crane. In a major three-week engineering exercise, the crane will travel overland about 2.1 kilometres to the western berth at Axis Bledisloe, the port's second container terminal.

The move is part of a reconfiguration of container crane at the port. The company is seeking to achieve optimum efficiency and productivity at the two terminals, as shipping-line customers require ever-faster turnarounds. The push for productivity comes in the face of increasing cargo containerisation and the prospect of larger container exchanges when bigger ships begin calling at New Zealand ports next year.

The crane will be jacked up onto skids and slid back from its rails about 12 metres. It will be jacked to full height onto special road trailers by the end of the week, ready for movement along Axis Fergusson terminal, past Freyberg and Jellicoe wharves and onto the western berth of Axis Bledisloe.

On arrival, the crane will be removed from its trailers and skidded onto the southern end of Axis Bledisloe's crane rails. The crane is expected to be in operation there by mid-June.

A further step in the crane reconfiguration is the purchase of two next-generation, post-Panamax container cranes for Axis Fergusson. The new cranes will be faster and more powerful than the existing cranes and will lift two 20-foot containers simultaneously. Currently under construction by the Zhenhua Port Machinery Company of Shanghai, they are scheduled to arrive fully assembled on a specialised crane transport vessel in January 2002.

Under the new configuration, Axis Bledisloe will have three gantry cranes and a mobile harbour crane.

"The crane relocation will ensure our container-line customers at Axis Bledisloe obtain service improvements, while at the same time the relocation will prepare for the arrival of our two cranes at Axis Fergusson," says Sandy Gibson, General Manager of Axis Intermodal, Ports of Auckland's specialist container-handling operation.

"In addition to the enhancement of



craneage at Axis Bledisloe, Axis Intermodal has increased the number of straddle carriers at the terminal and will upgrade computer systems in the near future."

The crane move is being carried out by Ports of Auckland Engineer Terry Dale. Ports of Auckland's Plant Service division is providing a co-ordinating role for the crane move at a field level, and is providing support services, including electrical work.

Auckland: Ports of Auckland Takes Team New Zealand in Tow

PORTS of Auckland has given a significant boost to New Zealand's campaign to win the next America's Cup, by providing Team New Zealand with a purpose-built syndicate tender for the duration of the event. The vessel is believed to be one of the largest rigid inflatable boats ever built.

The 60-foot tender will be used to tow the two Team New Zealand yachts out to the race course over the next two years during practice and racing.

It will serve as a mother craft for the syndicate, carrying staff and essential equipment for the yacht. The tender has been specially designed with low sides and wide decks to carry sails, allowing Team New Zealand to make last-minute changes to its sail inventory before racing.

The tender, which will be called the Ports of Auckland, is being built by Rayglass Boats with practical design input from Team New Zealand. Construction started late last year and will be completed by October this year. It is 17 feet wide, with a speed in excess of 25 knots and the capacity to tow two America's Cup yachts at 12 knots.



Geoff Vazey

The tender will be powered by two, turbo-charged six-cylinder Yamaha diesel engines, each producing 445hp. It will weigh 24,000 kg and according to Rayglass it is one of the largest rigid inflatables built anywhere in the world. The inflated tubes running down either side of the fibreglass hull are one metre in diameter, twice the size of those on a standard RIB. A "flying bridge" on a tower above the cabin will provide a second steering station.

Ports of Auckland will cover the cost of construction of the boat and Team New Zealand will have exclusive use of it for the America's Cup campaign.

Team New Zealand Chief Executive, Ross Blackman, said the boat would provide a perfect platform for Team New Zealand's sailing activities, particularly as it was capable of coming alongside the racing yachts and 'rafting up' without causing damage to the carbon fibre hulls. It has been designed to float at the same deck height as the racing yachts.

"We are extremely fortunate to have the support of Ports of Auckland in creating this purpose-built tender for our defence campaign. Efficiency on the water is another edge we need to be successful in 2003," said Mr Blackman.

Port of Auckland Chief Executive, Geoff Vazey, said the company was pleased to be able to assist the Team New Zealand campaign.

"It is appropriate for Ports of Auckland to be associated with an event that promotes New Zealand tourism, trade boat building and yachting activities.

"The America's Cup event has proven to be world class and has provided a significant economic boost to Auckland, and New Zealand. The last America's Cup generated about \$118 million in business from superyachts and \$127 million in the marine industry.

"Ports of Auckland has benefited from some of that increased business activity, so we are pleased to be able to put something back into Team New Zealand and the event to help make it a success next time."

In the lead-up to the last America's Cup event, Ports of Auckland provided \$800,000 in sponsorship to the Auckland Regional Services Trust towards the construction of the syndicate bases and redevelopment of the Viaduct Harbour.

Mr Vazey said he hoped that the Ports of Auckland contribution would help Team New Zealand retain the America's Cup so that the event would be held in Auckland in 2006.

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Bandar Abbas: Shahid Rajaei Port sees sizable container traffic growth

CONTAINERS handled in the container terminal of Port Shahid Rajaei (Bandar Abbas) exceeded the figure of 400,000 TEU and with 24% growth per year reached the recorded value of 416,000 TEU.

According to the relevant port experts and authorities, the following factors have contributed mainly to this growth:

- Adequate services rendered to the liners;
- Deployment of more extended container yards;
- Development in direct transport;
- Improvement in loading & unloading operations by virtue of an increasing privatization trend;
- An appropriate discount offered in port dues (60% to 90%).



In view of strategic location of this port in Persian Gulf and with the arrival of modern equipment and incorporation of International Terminal Operators in the port, it is expected that this growth maintains its ascending pace.”

*A. R. Khorramshkouh
Expert in public relations, PSO, Iran*

Brisbane: Leading Transporters Benefit from Proximity to Port

THE opening of two world-class transport operations at the Port of Brisbane's Fisherman Islands showed the logistical advantages gained from establishing at the port precinct, Innovation and Information Economy Minister Paul Lucas said today.

“The Port of Brisbane Business Park at Australia TradeCoast provided the perfect location for transport, logistics and container park operator, Chalmers

Industries, and container-packing operator, Globex ContainerLink,” Lucas said. “It allows them to relocate their respective container park and container-packing operations in one site to maximise synergies between the two businesses, while employing up to 54 people.”

The Chalmers Industries and Globex ContainerLink (formerly Chalmers Commodities) sites occupy 8.4 hectares - 30% of the available industrial land at the Port of Brisbane Business Park's stage 1. They will operate from the same office.

“The development is part of the overall vision the Queensland Government has for Australia TradeCoast, of which this project is a component and in which the Port of Brisbane Corporation is a participant, Lucas said.

Chief Executive Officer Graham Mulligan of the Port of Brisbane Corporation said another key factor in relocating both operations to Fisherman Islands was the provision of future key infrastructure in the form of the Port of Brisbane Motorway.

“When completed in 2003, heavy commercial vehicles will have faster access to the port from the Gateway Motorway, improving the port's productivity and reducing costs for associated industry,” he said. “We are negotiating with a number of other organizations for a substantial take-up of the available land in Stage 1 of the Port of Brisbane Business Park.

With the success of this first stage, we are now looking at opening up Stage 2 of around 15 hectares.”

Brisbane: Visitor's Centre to showcase port environment

CONSTRUCTION of a \$3.2 million energy-efficient Visitors' Centre on Fisherman Islands at the mouth of the Brisbane River will commence in early June, with the Port of Brisbane Corporation announcing the AbiGroup as the successful tenderer for the Blich Voller Nield-designed facility.

Commenting on the initiative, Graham Mulligan, Chief Executive Officer for the Corporation, said activities at the port at Fisherman Islands were of interest to increasing numbers of people.

“We know that around 3,000 people are visiting the port each year through organised tours, and many others come out here on an informal basis.

“The Visitors' Centre will formalise the port as a “destination,” and we believe it will be the catalyst for a steady increase

in visitor numbers in coming years.”

On completion in mid-October this year, the Centre will comprise a 100-seat theatre with a large screen video, a multifunctional auditorium, a licensed dining room and café facilities, as well as a range of interactive, interpretive displays.

“We see the facility performing an important educational function, as well as providing much-needed restaurant and café facilities for people working at the port.

“The conference centre will play an important role in the Corporation's activities, providing a venue for the many international and national trade delegations that visit the port each year,” he said.

Mulligan said the predominantly timber building had been designed to achieve maximum energy efficiency, with a bank of rooftop solar panels servicing demands for hot water, and 32 roof vents and high ceilings reducing dependency on air conditioning.

The 1,200-square metre Centre will be located on the northern bank of the Fisherman Islands' lake, and 320 square metres of covered decks will create a prime position for observing the resident bird life.

“Accessed, a business unit of Education Queensland, will be working with us to create interesting and educational displays that will appeal to ages.”

Fremantle: Cruise Festival Success

OVER 50,000 people visited Fremantle to see two of the flagships of world cruising, the *Oriana* and *Queen Elizabeth 2*, when the vessels called at the Port in February.

Visitors to Fremantle were able to view the luxury liners from the balcony of the Fremantle Passenger Terminal, and participate in the Cruise Festival Expo showcasing a wide variety of Western Australian products.

The QE 2 carries a maximum of 1,777 passengers and is the flagship of the Cunard Line. The vessel was launched by Her Majesty Queen Elizabeth 2 in 1967, and more than 30 years later is still one of the most famous ships in the world.

Oriana joined the P&O fleet in 1995 and has a passenger capacity of about 1,800. It has been a regular visitor to Fremantle since coming into service.

Other glamorous visitors during the

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One of the flag ships of world cruising, *Queen Elizabeth 2*, departs Fremantle Inner Harbour during the Fremantle Cruise Festival.

cruise season were the *Astor*, *Regal Princess* and *Silver Cloud*, which made its maiden visit to Fremantle.

Fremantle Port's Manager Commercial Development, Glenn Stephens says cruise shipping's annual world growth of 10 per cent makes it one of the fastest growing segments of international tourism.

"The industry worldwide has an estimated worth of \$17 billion a year, and there are obvious economic benefits in encouraging these cruise ships to Western Australia.

"It is estimated that on average, each cruise ship passenger spends \$200 a day in port. In addition, there is crew spending.

"Add to this the bunkering, provisioning and other services, and the direct expenditure for a large passenger ship would be somewhere between \$500,000 and \$750,000.

"The Fremantle Port Authority is working with the Fremantle Chamber of Commerce, tourism bodies and others to promote Fremantle and some regional ports in WA as cruise shipping destinations," Glenn Stephens said.

(Port News)

MPA: Receiving 21st Century Achievement Award for its maritime e-commerce system MARINET

SINGAPORE'S port and maritime agency, the Maritime and Port Authority of Singapore (MPA), has been named one of the top five finalists for the coveted 21st Century Achievement Award (Transportation Category) by the 2001 Computerworld Honors Program for its e-commerce system, MARINET. Finalists were selected as they represented the most innovative and visionary applications of information technology.

The results for this prestigious award were announced on Monday 4 June 2001

at a Formal Award Ceremony and dinner held at the National Building Museum in Washington, D.C, USA. It was attended by some 800 leaders and professionals from the global information technology (IT) industry including past award recipients, chairmen, and judges.

Mr. John Chen, Chairman of Sybase, Inc, had nominated the MPA for its MARINET system in recognition of its contributions to the global IT revolution and its impact on the maritime industry.

The MPA successfully developed and launched MARINET in April 1999 as a major e-commerce system to provide a total integrated service for Singapore's shipping industry, one which operates from a port that attracts more than 140,000 vessel calls a year with a total shipping tonnage of over 910 million gross tons. As a principal shipping hub, the port serves some 400 shipping lines connecting the Republic to more than 700 ports in 140 countries worldwide. These vessels call at Singapore for cargo operation, ship repair, bunkers and other ancillary services such as taking water and supplies, and changing crew.

MARINET was conceived with MPA's customers in mind, including shipping lines, shipping agents, shipmasters, terminal operators, pilotage and towage service providers, bunker operators, and ship chandlers.

Being Internet-based, it is able to reach out to international maritime customers operating in Singapore or around the globe. MARINET offers a comprehensive range of services. They include allowing the shipping community to submit statutory declarations for vessel arrivals and departures, dangerous goods, and information on bunker operations to the MPA online. Processing and validation are done online and approvals are granted immediately within one single transaction. At the same time, it facilitates online application for licences and permits issued by the MPA. Some of these services include application for a temporary harbor craft permit. The system also acts as a one-stop facility for shipping agents to order pilotage and towage services from any one of the licensed tug operators servicing the port.

MARINET has benefited the Singapore shipping and maritime industry on several fronts. First, it has reduced tremendously the amount of paper work. Second, it has helped streamline business processes and information flows, eliminate duplication of sending information to multiple parties to achieve faster clearance in shipping documents. Third, it has helped improve productivity and operational efficiency of our customers.

For instance, MARINET's Electronic Port Clearance (EPC) facility allows the shipping agents to print the Port Clearance Certificates (PCC) themselves at their own offices.

Currently, MARINET has more than 2,000 subscribers from over 500 companies in the maritime industry. Participation is voluntary, but almost 90 per cent of the local shipping community have signed up, attesting to MARINET's benefits.

More recently, the International Maritime Organisation (IMO), an agency of the United Nations based in London, in recognising that the electronic port clearance application as a new means to facilitate maritime traffic, has encouraged IMO members to adopt a similar approach for future electronic developments in clearance of ships.

Patrick J. McGovern, chairman of the Computerworld Honors Program Chairmen's Committee, said, "Finalists for 2001 Computerworld Honors represent those organisations whose use of information technology has been especially noteworthy for the originality of its conception, the breadth of its vision, and the significance of its benefit to society."

Yap Cheng Hua, Director, Information Technology, MPA, said, "We are honoured to be selected as a finalist for this prestigious Computerworld Honors Program Award. It speaks of Singapore's IT advancement, and the extensive use of IT to constantly improve the way MPA manages the port and the way shipping business is conducted."

A total of 53 finalists from eight countries were selected from a pool of 310 laureates in the 2001 Collection. They come from 34 states in the US and another 24 countries. These laureates were recognised for their significant achievements in the use of IT to benefit mankind across the following 10 categories: Business and Related Services; Education and Academia; the Environment, Energy and Agriculture; Finance, Insurance and Real Estate; Government and Nonprofit Organisations; Manufacturing; Media, Arts and Entertainment; Medicine; Science; and Transportation.

About the Computerworld Honors Program

The Computerworld Honors Program was created in 1998 when chairmen of the 100 leading IT companies saw the need to identify and celebrate the people making the most significant achievements in the use of IT for the benefit of mankind. These leaders agreed to work together to ensure that heroic individuals who were using IT to benefit society were remembered and that their innovative

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works were collected and preserved. The Computerworld Honors collections now encompass nearly 4,000 case studies submitted by laureates on six continents.

The program annually provides copies of these case studies, along with oral histories, video biographies and other primary source materials on the history of IT to more than 140 museums, libraries, universities and research institutions worldwide.

NYK: Japanese carrier NYK planning to order three new 178,000-dwt Capesize bulk carriers

NIPPON Yusen Kaisha (NYK) plans to order three newly designed 178,000 dwt bulk carriers for delivery between March 2003 and the second half of 2004. The Capesize vessels will replace existing Capesize bulkers which have been dedicated to the transport of iron ore and coking coal to Japanese steel maker NKK.

The shallow-draft design of the new vessels will enable them to berth at NKK's Fukuyama Works, in the Port of Hiroshima, in "virtually a full loaded condition." Maximum depth at the coal and ore berths is 16 meters (52.5 feet). Side-by-side comparisons of design specifications for these vessels and an existing NYK ship of comparable deadweight capacity are shown here:

	New Design "Koho"	
Delivery	On Order	1999
Length Overall (feet)	984.3	948
Breadth (feet)	161.05	147.6
Depth (feet)	79.1	79.1
Draft (feet)	52.8	58.4
Deadweight (Metric)	178,000	172,964

Sources: www.nykline.com and Clarkson Research, The Bulk Carrier Register 2001, p.478.

(AAPA ADVISORY)

Papua New Guinea: To Privatise Harbours Board, Port Operations

PAPUA New Guinea is to privatize its 17 state-owned Harbours Board ports as part of a national economic restructuring program.

Under the privatization program, all PNG's state-owned enterprises, which as well as the Harbours Board, include Air Niugini, PNGBC (the nation's major bank), Elcom and Telikom, will be fully or partially sold to retire debts and allow for much-needed recapitalization.

The sale of the Harbours Board is being managed by the Government's Privatization Commission, and plans are for a trade sale of at least 51 percent of the enterprise to be completed before the end of the year.

Included in the sale is the infrastructure of 17 operational ports, comprising wharves, pilotage and berthing facilities, storage areas, repair and maintenance facilities, and office facilities, including the Port Moresby head office building.

The "jewel in the crown" of the Harbours Board assets is the Port of Lae, which is the gateway to much of the interior of the country. Other major ports include Port Moresby, Madang and Rabaul.

In total, Harbours Board ports handle around 8,000 shipping movements and three million revenue tons of cargo a year.

According to the Privatization Commission's project manager for the Harbours Board sale, Dr. Derrin Davis, coastal shipping is the lifeblood of the country's transport sector.

"Because much of the country is mountainous, which limits road transport, shipping is a vital and growing part of the PNG economy.

"Both coastal and international shipping rely heavily on the port infrastruc-

ture operated by the Harbours Board," he said.

Preparations for the sale, including due diligence, has begun and legal, financial and operational strategic advisers will commence work in early July.

Advertisements seeking expressions of interest from potential purchasers will be placed with international media in August this year.

Further information can be obtained by visiting the website at:

www.pngharbours.com.au or

from Dr Davis, on e-mail:

harbours_project_manager@hotmail.com.

Penang Port Commission (PPC): North Butterworth Container Terminal Phase IIB Expansion

PENANG Port will embark on Phase IIB expansion of the North Butterworth Container Terminal (NBCT) to cater for the projected increase of seven per cent in container throughput for the next seven years.



Dato' Cap. Hj. Abdul Rahin
PPC's General Manager
Pengurus Besar SPPP

This is in line with the Port's supply driven policy.

The investment of RM322.4 million in Phase IIB expansion of the NBCT will involve the following works:

- Expansion of the wharf by another 300 meters from the current 600 meters
- Construction of a second access bridge
- Reclamation of 25 hectares of land for container yard and utilities
- Procurement of equipment

The NBCT will have an annual berth

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capacity of one million teus when expansion works complete in 2004.

Meanwhile, the reclamation of the 25 hectares of land area will provide additional yard space of 4,500 total ground slots which is sufficient to meet requirements until the year 2008.

The implementation of NBCT Phase IIB expansion is vital to meet the needs of port customers thus providing efficient and competitive container services in the northern region of Peninsular Malaysia and Indonesia-Malaysia-Thailand growth Triangle (IMT-GT).

The present NBCT wharf length of 600 meters with five quay cranes and 16 rubber-tyred gantries has an annual berth capacity of 660,000 teus. With only three berths available, the NBCT is able to accommodate three vessels each with an average length of 150 meters at any one time.

The Port is also currently handling containers at the Butterworth Container Terminal. The terminal is equipped with a 497 meter wharf and a complement of three quay cranes and 10 rubber-tyred gantries. It has a berth capacity of 270,000 teus per annum.

Nevertheless, the Port plans to centralise all container operations at the NBCT as a long-term measure.

(UPDATES)

PSA: Long-term Terminal Service Agreement With Wan Hai Line

WAN Hai Lines has signed a long-term Terminal Service Agreement (TSA) with PSA Corporation on 15 May 2001. The Agreement was signed by Richard Chuang, General Manager, Terminal Department, Wan Hai Lines, and Vincent Lim, Deputy President, Container Terminals Division, PSA Corporation.

Under the TSA, PSA Corporation provides a customized package of services and rates to meet Wan Hai Lines' needs. The TSA also ensures that Wan Hai vessels receive a consistently high level of service on containers moved through PSA Corporation's terminals in Singapore.

Richard Chuang of Wan Hai Lines said after the signing ceremony that Wan Hai Lines has been operating in Singapore since 1989 and has always received excellent services from PSA Corporation. This long-term Agreement further cements the existing good business relationship between both parties. He

added, "Wan Hai Lines has strong confidence in the excellent connectivity of shipping services both in and out of Singapore and in the long term prospect of container business in the region and Singapore."

Said Vincent Lim, PSA Corporation: "PSA has the privilege of serving Wan Hai Lines' container vessels and contributes to Wan Hai Lines' service offering to its customers. The signing of this long-term agreement testifies to the strengthening of our long and fruitful relationship, built up at every level of management for more than a decade. PSA

gives its commitment to work with Wan Hai Lines as partners and to provide them with fast, flexible, reliable world-class services. The Wan Hai Lines - PSA Agreement is a product of that commitment."

Wan Hai Lines started container shipping businesses in 1976 and currently operates some 20 service routes throughout Asia. Since May 2000, Wan Hai Lines had also started a service to the West Coast of America. Wan Hai Lines was awarded the "Best Intra-Asia Operator" at the Maritime Asia Awards for 1999 and 2000.

PSA Corporation operates the world's largest container transshipment hub in Singapore. It provides every shipper with an unrivalled choice of 250 shipping lines with connections to 600 ports in 123 countries. This includes daily sail-

Penang Port Commission(PPC): Penang Port Statistics

Penang Port Throughput (Fwt)

IMPORT	1998	1999	2000
Breakbulk Cargo	994,258	1,062,697	864,525
Dry Bulk Cargo	2,146,021	2,529,849	3,195,739
Liquid Cargo	3,286,764	3,432,618	3,553,068
Containerised Cargo	2,765,434	3,390,308	3,851,176
Total	9,192,477	10,415,472	11,364,508
EXPORT	1998	1999	2000
Breakbulk Cargo	675,265	780,463	956,307
Dry Bulk Cargo	89,525	238,967	238,849
Liquid Cargo	583,291	560,137	540,199
Containerised Cargo	5,935,572	6,759,522	7,307,200
Total	7,283,653	8,339,089	9,042,555
TRANSHIPMENT	1998	1999	2000
Breakbulk Cargo	2,304	1,752	21,800
Dry Bulk Cargo	0	0	27,453
Liquid Cargo	0	0	13,374
Containerised Cargo	1,362	4,289	3,356
Total	3,666	6,041	65,963
Total throughput	15,131,715	18,760,611	20,473,046
CONTAINERS (TEUs)	1998	1999	2000
Import	278,156	263,747	304,000
Export	232,151	302,662	331,780
Total	510,307	566,409	635,780
FERRY	1998	1999	2000
Passenger	3,993,651	3,598,318	3,275,174
Bicycles	69,313	65,143	49,846
Motorcycles	2,257,710	2,236,920	2,031,663
Motocars	877,208	878,504	830,099
Lorries	130,681	114,385	95,544

(UPDATES)

ings to every major port in the world. As a testimony to its excellent efficiency and quality service, PSA Corporation was voted the 'Best Container Terminal' at the prestigious Lloyd's List Maritime Asia 2000 for two consecutive years.

PSA Corporation was also awarded the 'Best Container Terminal Operator (Asia)' for the 12th time, and Singapore, the 'Best Seaport (Asia)' for the 13th time at the Asian Freight Industry Awards 2001. PSA Corporation was the first Singaporean multi-national corporation to be conferred the prestigious Singapore Quality Award for business excellence.

Besides its operations in Singapore, the PSA Group participates in 13 port projects in eight countries around the world in Belgium, Brunei, China, India, Italy, Korea, Portugal and Yemen.



Wan Hai Lines signs Customised Service Agreement with PSA Corporation