



PORTS HARBORS

Official Journal of the International Association of Ports and Harbors

Keeping it clean

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Mergers shrink the market

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Getting a grip on container
terminal congestion

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Getting a grip on container terminal congestion: we study three contrasting solutions from three different ports

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REGULARS

Comment: Secretary General Inoue on hinterland links	3
News: The latest industry news, including port updates, dredging projects, people and more	4
Open Forum: Peter Hinchliffe from the ICS on issues faced over emissions	20
Cover Story: As world trade continues to boom, we detail three approaches to problems of congestion	22
Maritime Update: European Commission initiatives, ship waste and more harmonisation on PSC	34
IAPH Info: A New Year message from the president and the last of the 50th anniversary celebrations in Nairobi	38
Bulletin Board: New member, how to get an extra copy of the annual report and take part in the IAPH reader survey	42
Last Word: Reflections on a successful 50th anniversary year from Dominic Taddeo	44

FEATURES

A logistics giant in ocean freight: DHL Danzas is well on the way to handling 1M TEU a year	12
Software: How one busy terminal improved efficiency	14
Indian shipping and logistics: Joe Mustan gives an outline of the subcontinent's needs	15
Vessel tracking: Progress on the European Union's SafeSeaNet system is outlined by Heiner Lamprecht	16
Clean moving: A study from Tacoma on how new straddle carriers have reduced emissions	18
Less pollution: Traffic improvements have reduced pollution around Los Angeles and Long Beach	19
Mergers and mega carriers: Port schedules face upheavals as lines merge and alliances co-operate	28
Mergers and port takeovers: Global operators consolidate terminal ownership into fewer hands, says Neil Davidson	29
Cruising down under: Australia's ports want to attract more cruise operators, explains Eve Duffy	30
Security myths: Case studies on how some ports made mistakes in complying with the ISPC audit are detailed by Brinley Billings	32



38



18



22

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Building hinterland links as well as ports

To ease congestion, we need to co-operate to
improve all the connections to ports

A Happy New Year! I trust you all have had enjoyable holidays and have started a New Year of challenges at full steam. As the world's economy and trade grow continuously this year, we will see the outcome from the mergers and consolidations rapidly concluding amongst global container carriers. This will inevitably impact on our ports in terms of calling patterns and ship sizes.

Last December, the IAPH Africa/Europe Regional Meeting cum 50th anniversary celebration was held in conjunction with the 5th annual conference of the Pan-African Association for Ports Co-operation (PAPC). During the conference, many pointed out a

pressing need for physical and operational improvements to the roads and railways that connect to ports. Without these links, ports are not able to successfully fulfil their basic mission as the gateways to respective countries – no matter how they work hard to enhance their capacity and productivity.

For instance, the Port of Mombasa has a vast hinterland, including the capital city of Nairobi 500 km away and further into the land-locked neighbouring countries beyond Kenya's borders. In fact, over 20% of the total throughput of

“ We should play a far more active role in developing integrated transportation systems for reliable and efficient hinterland access ”

the port is transit cargo. It is, therefore, crucial for the port to be supported by good rail and road systems.

It is absolutely necessary to co-ordinate and integrate these transportation systems with port development. It is essential, not just to the Port of Mombasa, but all the ports in the world. Look at the severe port congestion being experienced by major ports – in particular those on the west coast of the USA and in northern Europe. To cope effectively with the current port congestion, we need co-operation to improve all the transportation systems supporting port activity.

We at IAPH should play a far more active role in developing integrated transportation systems which deliver reliable and efficient hinterland access. **PH**



Dr. Satoshi Inoue

Secretary General – The International
Association of Ports and Harbors

PORT UPDATES

OIL FUELS PORT PLANS

A massive five-year US\$100Bn infrastructure plan for the Zulia state funded by oil revenues – including a new deepwater port near Lake Maracaibo – has been announced. A new deepwater port is to be constructed between the entrance of Lake Maracaibo and the Gulf of Venezuela, which would reduce the number of vessels entering the lake. It will accommodate mineral, general cargo shipments and feature a new barge terminal.

NEW RO-RO IN THAILAND

A new joint venture company formed by a consortium led by Hutchison Port Holdings has won a 30-year concession to build and operate a ro-ro terminal at the Port of Laem Chabang.

The terminal will have general cargo handling capability, with a total 500m of quay and 16m alongside depth.

More info at www.hph.com.hk

BONDS FUND PORT DEVELOPMENT

The Philippine Ports Authority (PPA) is to float PhP1.5Bn (\$28.31M) to PhP2.0Bn worth of bonds as part of its programme to fund the modernisation of the country's major ports.

PPA general manager Oscar Sevilla said that the bond flotation, which has a proposed five-year fixed rate, will finance the expansion and repair of the ports that include Iloilo, Davao, Ozamiz, Cagayan de Oro, General Santos and Zamboaga. It will be floated before the second quarter of this year, he added.

INCHEON'S NEW BERTHS

Incheon's North Port Operation, a joint venture between Ssangyong Construction and six stevedoring companies, has begun building three general cargo berths costing KRW113.9Bn. Scheduled for completion by 2008, the berths will occupy a 700m quay and be able to accommodate 20,000dwt ships.

Incheon Container Terminal is to get a free trade zone offering benefits to foreign investors.

More info at www.portincheon.go.kr



Port Botany flourishes

Already handling an annual \$40Bn of trade – and a third of Australia's container traffic – Sydney Ports Corporation's Port Botany is expanding further after New South Wales' planning minister approved development plans.

The port currently has six box ship berths, plus a common-user berth for bulk liquids. As we went to press, work had already started on phase one of a new, four-berth container terminal with road and rail access.

About 51ha of land is being reclaimed adjacent to the existing Patrick Corp. terminal and parallel to the nearby airport's third runway.

Phase two will see a fifth berth built, but where will depend on current investigations into the most suitable site. Three possibles have been identified: one immediately next to the current expansion at Brotherson Dock North and two others close to Brotherson Dock South.

Second only in size to the port of Melbourne, Botany's seen growth of 30% over the last three years

and handled a record 1.34M TEU in 2004-2005 – so approval for the expansion plans was enthusiastically welcomed by Sydney Ports Corporation CEO Greg Martin.

"It'll provide planning certainty and facilitate investment by government and the private sector to ensure adequate container handling capacity to beyond 2025," he said.

And he added: "The investigation to find the best location for an additional fifth berth is also welcome – it'll provide an opportunity to gain maximum benefit from the A\$2Bn already invested in Port Botany's infrastructure."

With current trade growth projections, the port could reach capacity by around 2010, prompting the Corporation to lobby for a quick decision on the development. The port currently has six container terminal berths with two stevedores and a common-user berth for bulk liquids.

The port has had to adhere to strict environmental conditions to gain approval for the development.

New Vietnam terminal

P&O has signed a joint venture agreement with the Tan Thuan Industrial Promotion Company (IPC) for a US\$224M container terminal in Ho Chi Minh City, Vietnam. P&O will own 80% of the Saigon Premier Container Terminal, and IPC (holding the remaining 20%) will grant 43-year concession rights.

The JV will develop 1,000m of quay and 40ha of land to enable the port to handle 1.5M TEU a year. Development will be phased to cope with demand, with the first two, of four, berths scheduled to open in the first quarter of 2008.

Ho Chi Minh City, the economic centre of Vietnam, is currently served by various ports along

the Saigon River, most of which the government plans to close over the next 10 to 15 years, as developments are completed.

Cargo currently moving through these ports, which has been growing at about 18% a year, will switch to the new terminal,

Annual GDP growth in Vietnam is now in the order of 7-8%, boosted by continuing programme of economic reforms since the end of the 1980's.

New JV at Yangshan

Five major ports and shipping companies have been selected by the Shanghai municipal government to build the next phase of the port's US\$12Bn container terminal at Yangshan Island.

Two companies have a 32% stake each in phase II of the development – APM Terminals, part of the Danish shipping giant AP Møller-Maersk (APM) and Hutchison Port Holdings. The other shares go to Shanghai International Port Group with 16%, Cosco Pacific with 10% and China Shipping Group with 10%.

Phase I opened in December last year and phase II will open later this year. By then there will be four deep-water berths capable of handling the latest generation of mega-vessels. The new terminal will cover 64ha, have a quay length of 1,400m and a depth alongside exceeding 15m.



Planning the world's biggest container terminal: Li of Hutchison Whampoa and Shanghai mayor Han Zheng at the ceremony

At the joint venture signing ceremony, Li Ka-shing, chairman of Hutchison Whampoa said: "The Yangshan deep-water port affirms Shanghai's status as a major international shipping centre and deep-water container transport hub, and will accelerate growth in the Yangtze river delta." APM said the move strengthens its position in Shanghai, which it expects to be the world's largest container port by 2007.

Amazon boost

The port of Cacau-Pirera on the Amazon River is to receive BRL12.5M under plans announced by the government.

Half will be contributed from central government sources and the remainder from Manaus state to fund the import of construction materials to develop the area. The old river port of Iranduba will also receive about BRL10.7M.

Also in Brazil, the new port of Sao Joao da Barra, some 280km north of Rio de Janeiro, has been given official approval by energy and shipbuilding minister Wagner Victor. He said an environmental licence has been granted for the port, which will specialise in iron ore exports. Construction should begin this year.

More info at www.brasil.gov.br

JV expands at Dalian

Dalian Port Container Terminal, a joint venture between PSA, COSCO Pacific, APM Terminals and Dalian Port Container Company, has signed a 50-year agreement to acquire, construct and manage the remaining four berths at Dalian Dayaowan Phase II.

The JV now owns all six berths at the terminal which, when completed, will have a total 2.8M TEU capacity, 2,097m of quay and depths ranging from 13.5m to 17.8m.

Rail projects on track

Six regional rail projects totalling US\$45.7M will sustain the port of Virginia's growth in the coming decade, according to the Virginia Port Authority (VPA).

"The port is only as good as its connections to markets and customers," said Jeff Keever, VPA deputy executive director. "The strength of our existing rail service is a real selling point for our port.

When these projects are looked at as a whole there are some common goals: to make the flow of goods more efficient, to reduce truck traffic on the region's roads and to strengthen the port's competitive position on the US east coast."

The port was interested in six elements of the plan: improvements to the Heartland corridor; purchase of the commonwealth railway line; extension the Maersk terminal rail yard; the Suffolk connection from CSX to Commonwealth Railway; Portsmouth subdivision height clearances and improvements to the Crewe rail yard in Suffolk.

All of these projects are needed to help the area's rail infrastructure prepare for the continued growth at the port, Keever added.

Hong Kong loses out

Hong Kong is failing to keep pace with mainland ports, recording only a modest 1.2% increase trade in the first 11 months of last year to 20.5M TEU. Throughput actually declined in November.

According to the Hong Kong Port Development Council (PDC), November trade totaled 1.7M

TEU, a drop of 7.9% over the corresponding period in 2004.

Much of the growth is shifting to mainland ports. In the first 11 months of 2005, nearby Shenzhen Port handled 14.8M TEU – up 19.21%. Shenzhen expects to handle over 16M TEU in 2005, breaking its own records again.

PEOPLE

PSC HEAD

Yung-Sun Park, a maritime technology officer at South Korea's Ministry of Maritime Affairs and Fisheries was elected chair of the Asia-Pacific region's port state control committee, at the group's 15th meeting in Bangkok.

REGISTRY APPOINTMENT

Annie Ng has been appointed managing director of International Registries (Far East) based in the company's regional office in Hong Kong. She is responsible for the company's maritime and corporate registry business in the Asian region.

BAKER RETIRES

Joe Baker Jr, executive director of The International Cargo Security Council, the USA-based association for cargo transportation and security professionals, has retired after seven years in the job. Baker plans to consult on cargo security, transportation and government issues.

MOVES AT ABP

Associated British Ports (ABP) has appointed Andrew Garner as general counsel, succeeding Stephen Walsh who held the position for three years.

"We have every confidence Andrew will be a valuable asset to ABP," said CEO Bo Lerenius.

In another move, David Leighton takes over as ABP commercial manager, after serving nearly three years as development executive at Rail Freight Group.

AUCKLAND PORT CHIEF

Jens Madsen has been appointed the first chief operating officer at Ports of Auckland, which he joins after 28 years with AP Møller-Maersk.

FROM SHIPS TO PORT

Rotterdam has a new supervisory director after the appointment of Rutger van Slobbe, who moves from the executive board of P&O Nedlloyd. He takes over from Wim van Sluis

Van Slobbe has wide experience in the international transport sector and the port of Rotterdam. In the past he has worked for KNSM and Nedlloyd in South America, the USA, Japan and Hong Kong.

Cash & cargo

ECT BUYS INTO GERMANY

Europe Container Terminals (ECT), part of the Hutchison Port Holdings Group, has bought a 51.56% majority stake in Duisburger Container Terminal (DeCeTe), a large inland terminal in Duisburg, Germany.

Commenting on the investment, Jan Westerhoud, president, ECT said: "DeCeTe fits perfectly into ECT's strategy of strengthening the connections between hinterland container flows and the sea terminals in Rotterdam."

Daily links are maintained by a combination of a 16-hour barge shuttle journey and a train shuttle journey of three hours to the ECT Delta Terminal, ECT Home Terminal and the ECT Hanno Terminal in Rotterdam.

INDIAN BASE

Kalmar Industries has established its own subsidiary company in India through the acquisition of 51% of Indlift, the agent for Kalmar products in the country since 2000.

Indlift employs 18 staff and has operations in Mumbai, Khandla, New Delhi, Vizag and Bangalore. The previous owner of Indlift, Vijay Kumar, will take up the position of MD of Kalmar India.

Christer Granskog, president and CEO, Kalmar Industries, commented: "This acquisition fits in with Kalmar's strategy of boosting its direct involvement in sales and services in its major markets."

SOUTH AFRICAN PROFITS

Transnet's two port divisions helped the South African corporation stay in profit for the half year ending September 30, 2005 with revenues of SAR24.1Bn and an operating profit of SAR3.1Bn.

More info at www.transnet.co.za

RECORD AT QASIM PORT

Administrative and structural reforms helped Qasim Port Authority make a record PKR1Bn (US\$16.61M) in 2005.

Ports minister Babar Ghouri said the government aims to make Qasim a leading international port.

More info at www.portqasim.org.pk

California looks at green container 'tax'

In a bid to reduce emissions from the area's major ports, the smog control agency for Los Angeles and Long Beach, the Air Quality Management District (AQMD), has announced a radical clean port initiative.

A 'tax' on containers and shipping traffic and calls for federal rules on emissions are just part of the proposed package. AQMD claims that emissions from ships, trains, trucks and cargo handling equipment at the two ports are the main fixed source of air pollution in the Los Angeles Basin.

The agency plans an international summit with Asian port officials to discuss how to implement joint emission

reduction measures and plans to ask the California legislature to adopt a shipping-container fee or other mechanism to fund clean air initiatives at the ports.

"Reducing air pollution at the ports is the single most important challenge facing us, as we work to achieve healthful air quality in the southland," said governing board chairman William Burke. "AQMD's clean port initiative will build on clean-up efforts to date and take them to a new level."

Under the plan, the port of Los Angeles is called on to reduce emissions, but Burke is keen to ensure co-ordinated policies from both ports to prevent either port gaining a competitive

edge through less stringent environmental standards. He warned that ports and shipping companies should bear their fair share of the cost of any measures to reduce pollution.

AQMD has called a clean port summit to include Burke, harbour commissioners and presidents of the two ports – David Freeman of Los Angeles and Doris Topsy-Elvord of Long Beach. On the table – ways to develop and co-ordinate fast-track measures to reduce air pollution.

AQMD has warned that action will be taken to control port sources of emissions, including those from ocean-going ships, if the ports do not act to reduce pollution.

It wants the adoption of strict emission standards for ships at federal level, otherwise it will press California's congressional delegation to sponsor legislation.

Joint venture for Singapore terminal

Singapore's PSA Corporation has formed a joint venture with Mediterranean Shipping Company (MSC) – the world's second largest shipping company – to jointly manage and operate a container terminal in Singapore.

The MSC-PSA Asia Terminal (MPAT) will have representatives from both companies on its board and management team.

MPAT will occupy three berths at Pasir Panjang, with an annual capacity in excess of 2M TEU.

The development of new berths at the terminal is reported to be ahead of schedule. Four new

berths are in operation, able to accommodate the largest container vessels and are equipped with super-post Panamax quay cranes.

In all, PSA has a total of 41 berths equipped with 131 quay cranes in Singapore.

Another 11 new berths will be added by 2011, boosting PSA's total annual handling capacity to 31M TEU.

Grace Fu, PSA's CEO, South East Asia & Japan, international, said: "The signing of this joint venture in Singapore, together with our existing joint venture with MSC in Antwerp, means that our partnership has reached greater heights."



The terminal occupied by MPAT at Pasir Panjang will occupy three berths with an annual capacity in excess of 2M TEU

Ports green up

Two ports have won recognition for their work in the field of the environment, by gaining certificates from Dutch-based EcoPorts environmental review system (PERS).

The port of London (PLA) and the port of Amsterdam have both received PERS certificates, a European standard for compliance with the European Sea Ports Organisation's environmental code.

Herman Journee of EcoPorts said: "Practical experience with the PERS system shows that PERS also leads to cost reductions."

For the PLA, CEO Richard Everitt, added: "The PLA takes its responsibility to protect and enhance the river and estuary environment of the Thames very seriously."

Amsterdam vice-mayor Mark van der Horst observed: "We focus on solutions that benefit both the environment and economic development. In practice, that balanced approach yields better results than a narrow focus on the environment."

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BOUGHT & SOLD

MOVING IN AUCKLAND

Ports of Auckland has ordered three new gantry cranes, four new straddle carriers and is looking to purchase additional new straddle carriers. The company has just taken delivery of a new \$520,000 container fork truck for its general cargo wharves.

STACKING UP

Orders for 23 empty container handlers (ECHs), capable of stacking 8ft 6in containers eight high, have been placed with Kalmar. The cranes are destined for DP World operations in Port Rashid and Jebel Ali Port. More equipment is going to Patrick Corporation's Fisherman Islands facility in Brisbane, Australia, which has ordered the world's first AutoStrad fully automated straddle carriers.

The facility now operates with 14 automated Kalmar EDRIVE straddle carriers, the first to be purpose-built for unmanned operations. The machines operate unmanned 24 hours a day, 365 days a year.

More info at
www.kalmarind.com

TOWARDS HUB STATUS

ICTSI's Suape Container Terminal in Pernambuco, Brazil, has made a move towards its ambition to achieve hub status, with investment of US\$17m on two post-Panamax quay cranes and two rubber-tyred gantries, built by Shanghai Zhenhua Port Machinery Co.

ORDERS IN THE STATES

Ellicott Dredges has won orders from three USA states and several federal agencies.

Delaware ordered four vessels, including a series 670 Dragon named *Broadkill* and an MC-2000 Mud Cat christened *Indian River*.

New York State ordered a 355mm cutter dredger to maintain the 584km Erie Canal, and Ohio ordered a 254mm swinging ladder dredger for the removal of silt from state-owned lakes and ponds – which should be in action as you read this.

More info at www.dredge.com

Constantza opens its new passenger terminal

Tourism will benefit from the new passenger terminal opened at Romania's largest port, Constantza on the Black Sea, according to port authorities.

Now a tender has gone out from national ports administration MPA to attract operating companies to the terminal. Details of the tender process are

available at www.portofconstantza.com

The berth is 293m long with a depth of 13.5m and can accommodate vessels with draught of between 10-11m.

Constantza is a destination port for several river cruise lines as well as sea lines serving the Black Sea.

The new passenger terminal has been built at the old port, close to the north breakwater. It features enhanced passenger facilities with parking areas for cars and tourist buses and is located close to the old historic part of Constantza city, between the royal pavilion – now the port museum – and the old lighthouse.

Vessels now have direct entry to the port, eliminating the need for additional maneuvering. New road connections link the terminal to the city and resorts.

Bathside go ahead

Hutchison Ports has gained provisional approval from the UK government for a 1.7M TEU deepsea container port at Bathside Bay in Harwich, in a bid to elevate congestion at the country's ports.

In giving the provisional approval, transport minister Derek Twigg said he was calling for clarification of some issues raised by the inspector at the public inquiry in 2004. These cover environmental aspects and the need for road improvements.

Twigg said he would impose conditions on developers to ensure road improvements were made to provide congestion relief.

"We believe this expansion in ports capacity is justified by the economic benefits it will bring regionally and nationally, for UK industry and the economy," Twigg said in a statement.

"We are committed to sustainable distribution and this new project would

play a large part in securing that aim.

That is why I am minded to agree with the inspector's recommendation that we should approve this project.

"We understand at the same time that the new terminal will have a significant impact on the environment.

"This is why we agree that there should be controls imposed on the development, to provide new road and rail infrastructure so that congestion does not increase and to reduce other environmental impacts such as noise, pollution and the visual impact," he added.

Harwich is part of the regional grouping Haven Gateway, which also includes Felixstowe, Ipswich and Mistley.

"This announcement marks the beginning of an exciting new chapter for the region," said Gateway chairman George Courtauld. "We are delighted with the decision."

New port chief sees unions

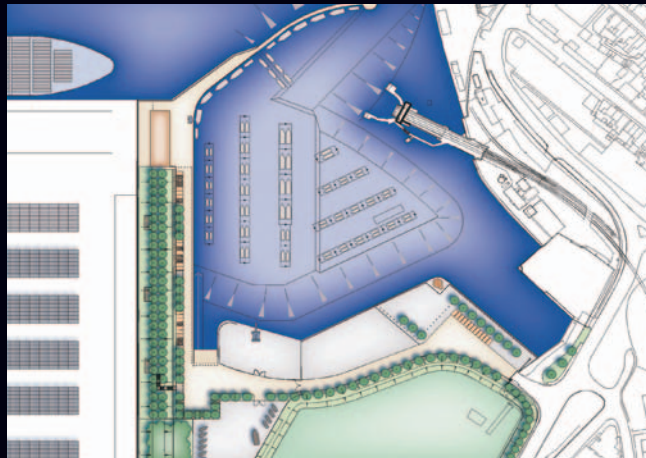
The Port of Marseille Authority's new director-general has lost no time in confirming his commitment to port development projects, including construction of the prestigious new Fos 2XL container terminal.

Guy Janin said his main aim was to create the conditions for growth both at the port and in the local economy.

And he initiated what he termed "constructive social dialogue" with local authorities, port users, employees and union representatives in a bid to achieve this. The moves are designed to overcome the industrial unrest the port experienced in 2005.

His said another priority was to oversee completion of the port's development programme, in which he highlighted Fos 2XL – due to open in 2009 – as a key driving force in regional wealth and employment.

Janin's appointment was confirmed by the French government late last year. The 58-year-old civil engineer had been director-general of the inland waterways authority Voies Navigables de France since 2004. Before that, he had experience in national and regional public works departments.



Cost Standards for Dredging Equipment

Dredging is a capital-intensive industry, often involving only a few main marine construction plant on each project. It is also a civil engineering or marine activity that frequently takes place in a relatively inhospitable environment, where site investigation costs can be high and construction risks are elevated by the working conditions and the potential difficulties of obtaining site information. As a consequence, dredging works can be subject to variation, re-measurement and occasionally disputes relating to valuation. The capital and related cost of equipment are crucial to the evaluation of these matters. Moreover, in the global market place consultants and (potential) clients are in need of comparisons of equipment costs and other tools for evaluating tender documents.

For such reasons, a method to establish the capital and related costs of the various types of dredger commonly in use has now been made available by CIRIA. These Cost Standards for Dredging Equipment 2005 (to be published in February 2006) have been developed in co-operation with the International Association of Dredging Companies IADC and are audited by an independent panel.

The publication includes a brief description of the main categories of dredging plant and provides calculations on replacement values, depreciation and interest costs as well as maintenance and repairs costs for:

trailing suction hopper dredgers;

cutter suction dredgers;

other suction dredgers;

booster stations;

backhoe, grab and bucket dredgers;

barges and dumping vessels;

jack-up pontoons;

**auxiliary equipment
(pontoons, multicat's, tugboats), and;**

pipelines.



Cost Standards for Dredging Equipment

£ 25.- CIRIA members / £ 50.- non-members
€ 35.- IADC members / € 70.- non-members

Equipment	Capacity (m³/hr)	Power (kW)		Fuel saving (litres/hr)	
		(kW)	(HP)	(litres/hr)	(litres/hr)
Trailing suction hopper dredger	400	400	550	220	950
Cutter suction dredger	100	100	135	50	200
Other suction dredger	100	100	135	50	200
Booster station	100	100	135	50	200
Backhoe, grab and bucket dredger	100	100	135	50	200
Barge and dumping vessel	100	100	135	50	200
Jack-up pontoon	100	100	135	50	200
Auxiliary equipment (pontoons, multicat's, tugboats), and;	100	100	135	50	200
Pipeline	100	100	135	50	200

CIRIA
sharing knowledge
building best practice

The publication can be ordered as follows:

for the UK please contact CIRIA:

Tel: +44 (0) 20 7549 3300 fax: +44 (0) 20 7253 0523

Email: enquiries@ciria.org, www.ciria.org

outside the UK please contact IADC:

Tel: +31 (0) 70 352 3334 fax: +31 (0) 70 351 2654

Email: info@iadc-dredging.com, www.iadc-dredging.com

DREDGING PROJECTS

FLORIDA FUNDING

Several South Florida dredging projects have received funding, including the port of Palm Beach, Florida's fourth busiest container facility, which will see US\$1.065M dedicated to harbour and inlet deepening.

Additionally, Broward County won US\$750,000 to nourish 12 miles of eroded beaches and Port Everglades gained US\$125,000 for a general investigation into the Southport Channel and Turning Notch deepening and widening project. It will get a further US\$375,000 if the project gets the go-ahead.

LA LOOKS INTO THE DEEP

A second-look impact statement for deepening Los Angeles' inner harbour channels is underway by the US Army Corps of Engineers (USACE).

LA needs to dredge to accommodate the next generation container vessels – key issues for USACE include where to put the spoil.

More info at www.usace.army.mil + www.portoflosangeles.org

FEDERAL FUNDS

The Port of Houston Authority will get nearly US\$45M in federal funding this year to dredge and maintain the Houston-Galveston ship channel. A project to widen the channel from 400ft to 530ft and deepen it from 40ft to 45ft was completed earlier last year.

More info at www.portofhouston.com

PARADIP IMPROVES ACCESS

India's cabinet committee on economic affairs has approved an estimated INR1,584M, 72-week project to deepen Paradip port's access channel to allow vessels up to 125,000dwt to use the port.

The government will provide a third of project costs (INR516M) as a grant and an equal amount as a loan.

More info at www.paradipport.com

EROSION PROTECTION

Dredging has been completed at the port of Everett's new 12th Street Marina basin – shoreline rock placement to protect against erosion. Next project is pile driving. The Florida port handles 1M tons a year.

More info at www.portofeverett.com



From terminal to power plant

Clean power plans

Electrabel Nederland has applied for planning permission for the construction of a new power plant at Maasvlakte in Rotterdam.

If successful, it will turn the coal importing EMO dry bulk terminal into a new 600Mw to 800Mw power plant.

Both coal and biomass will be used to create power at the plant, which is expected to come on stream between 2011 and 2012.

The final decision for investment in the facility will be taken next year, but to start the process, the port is undertaking environmental studies. The modern plant is expected to

contribute to a reduction in the area's emission of greenhouse gases (CO₂).

Further studies will determine whether it can be made suitable for the catching and storing of CO₂, in line with the Netherlands government's 'clean fossil' policy.

Although the technology for this is currently still in the developmental stage, Electrabel says it plans to determine whether the implementation of this technology is technically and economically feasible.

The port of Rotterdam (PoR) hopes that construction of the plant will strengthen its position

as an 'energy port'. Other electricity producers, including most recently Eon, have expressed their interest in building on the Maasvlakte.

The PoR aims to secure competitively priced energy supplies for companies in the port and the industrial areas that surround it. 'This energy should be 'as clean as possible', it added.

This condition has been put on development of the diverse complexes already planned, in Rotterdam, which include gas and coal-fired power plants, total energy plants, 80 wind turbines and terminals for LNG, coal, oil and biomass.

LA helps clear the air

Representatives from the port of Los Angeles have visited China and Taiwan as part of a mutual pact between the USA and China to manage air pollution derived from marine vessels and ports.

China is the port's main trading partner, with more than US\$64M worth of cargo coming through the port of Los Angeles in 2004.

The visit included meetings and presentations at the ports of Shanghai and Taipei. Discussions centred on reducing diesel emissions and managing urban air

pollution resulting from port-related operations.

Part of the funding for the trip came from a US\$185,000 grant from the Department of Transportation Maritime Administration (MARAD) to set up a programme to exchange ideas on air quality technology.

LA will assist the port of Shanghai to set up an advisory group, modelled on the California Air Resources Board's maritime working group. The two ports have agreed to collaborate on the issue.

Santos expands to beat congestion

The Brazilian government is moving ahead with plans to expand the port of Santos, the biggest general cargo port in South America, currently suffering from serious congestion problems.

Development of the site, at Barnabe Bagres, will cost US\$2Bn

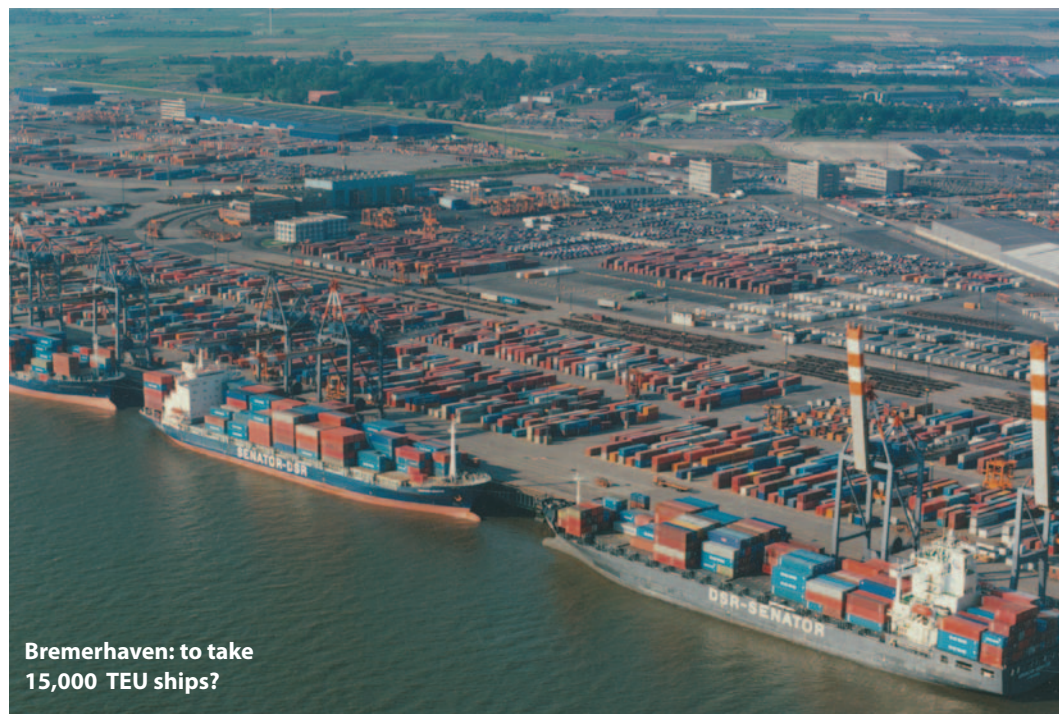
and increase the port's capacity to about 230M tonnes per year.

Current capacity is only around 85M tonnes and cargo levels for 2005 were about 72M tonnes, an 8% increase over 2004.

Fabrizio Pierdomenico, the commercial director for the Santos

port authority, Codsep, said that cargo volumes were expected to increase in the future. "Barnabe Bagres is the logical place to expand the port of Santos and we need to do so as soon as possible to keep up the momentum of Brazilian exports," he added.

Bigger box ships expected



Bremerhaven: to take 15,000 TEU ships?

Rumours that AP Møller-Maersk will deploy giant container ships with a capacity of 15,000 TEU next year have been given fresh impetus by plans from Bremerhaven, the Danish line's German hub.

The port will widen its turning basin to accommodate ships of up to 400m length later this year. "The information we have obtained suggests that vessels of that length will enter into service next year," Bremen's economics senator,

Jörg Kastendiek, said.

The largest Maersk vessels calling at the port now are 367m long with a capacity of more than 10,000 TEU.

Sources within the port administration believe that new

COURSES & SEMINARS

MARINE AGGREGATES

The AAPA Cruise Seminar, takes place February 8-10, in San Diego, USA.

More info at www.aapa-ports.org

CONTAMINATED SEDIMENTS

Sediments & Sentiments – Cleaning European Waters, March 20-21, Budapest, Hungary.

More info at www.reused.nl

PORT STATE CONTROL

The International Chamber of Commerce Port State Control Course runs April 3-13, at the University of London.

More info at www.icc-ccs.org

TRAINING PROGRAMME

AAPA/NA WE/MARAD Terminal Management training programme, April 24-28 Charleston USA.

More info at www.aapa-ports.org

PORTS & DREDGING

The 42nd International Port Seminar takes place April 24-May 12 in Delft, Holland, and will be followed by the IADC Dredging Seminar from May 15-19.

More info at www.unesco-ihe.org

ENGINEERING

Education, Training and Continuing Professional Development of Engineers in the Maritime Industry organised by RINA and the IMarEST, will run May 17-18, in London.

More info at hq@rina.org.uk

ships currently under construction for the line in Odense, Denmark, would have a capacity of 15,000 TEU. This would make them 400m long and 22 TEU wide. Currently Maersk operates ships accommodating 17 TEU across.

Maersk's North Sea Terminal Bremerhaven (NTB) – a joint venture between APM Terminals and local operator Eurogate – has already been equipped with gantry cranes that can straddle 22 TEU rows. Container volumes at NTB increased more than six times over the past four years and now account for over half the overall throughput at the port.



A giant in ocean freight

DHL Danzas is not just a courier – it sends nearly one million containers by sea every year, as *Ports & Harbors* explains

Logistics companies thrive on the globalisation of purchasing, production and distribution which has made supply chains more and more complex. They are generators of a huge amount of containerised cargo – and the volumes they ship are growing by double digits each year.

The ability to successfully manage them is increasingly giving manufacturers and trading companies a key competitive edge and more and more of them are using specialised logistics providers.

Familiar name

DHL is a name familiar to many when thinking in terms of couriers and increasingly the logistics giant has become a huge customer of ports. Now part of Deutsche Post World Net, DHL has been renamed DHL Danzas air & ocean business division. In this logistics entity, DHL carries more and more ocean freight – recording 20% growth in the number of TEU handled each year. There is also a contract division to handle industrial consignments.

According to Frank Appel, board member for DHL's logistics corporate services, there are contradictory demands facing logistics companies such as his own.

"They must have a global reach and at the same time be familiar with local conditions. They must offer a wide range of standardised services as well as develop tailor-made industry solutions." And they must have size. A giant organisation such as DHL is able to command enough freight capacity to prevent the build-up of bottlenecks, he says.

The company negotiates port-to-port or door-to-door full container and less than container load services acting as broker and buys loading space and charter capacities on the global market. "We handle most of our transport volumes using selected freight carriers," Appel observed. "A special element of the air & ocean business division is the provision of complex logistics services for infrastructure and industrial projects. We handle the smooth delivery of plant and equipment, for example, and production systems for the oil and gas industry."

“ We are looking for expansion in target industries in the growing regions of North America and Asia ”

“We will carry on with the strategy of growth in the air & ocean business division. In this context, we have been investing in the expanding Asian market for several years. This has given us a clear advantage over our competitors in China.”

Emerging markets

He continued: “We are also endeavouring to expand our business in North America by generating higher transport volumes on key routes. In emerging markets such as Eastern Europe, where a large network of branches is already in place, and Africa, where we have strengthened our position by exploiting internal synergies, we intend to realize the available potential and expand through organic growth. We will also focus on growing our range of temperature-controlled transport solutions for the life science industry.”

Bernd H. Flickinger, chief operating officer of contract logistics division DHL Solutions, explained: “We develop complete logistics solutions for companies from industrial sectors such as automotive, pharmaceutical, healthcare, electronics, telecommunications, fast moving consumer goods, textiles, and fashion.”

A package of tailored logistics solutions is put together for these customers. “This makes us different from freight carriers, who primarily only offer individual services,” he added.

Case study

He pointed to the group's relationship with manufacturer Samsung in several European locations: DHL handles the group's logistic support in Eastern Europe and hands inventory storage, dispatch and return management for Samsung's consumer electronics division.

“Business in contract logistics is based on long-term relationships: contracts with major and multinational businesses generally have duration of three to five years,” Flickinger continued. “We often take over our customers' inventory management – either in their existing warehouses or units we specially build. In doing so, we concentrate on what are known as multi-user warehouses, using complexes at strategically important locations that can be used in a flexible way by several customers.

“This allows us to react quickly to the changing requirements of our customers and also to optimise warehouse productivity.”

He added that this had led to the development of

a transport management centre where the transport process was planned. Then the capacity utilisation was decided upon, the transport service providers selected. “We are already running the entire European distribution network of multinational customers in this way,” he said. “This allows us to generate additional business and customers to concentrate on their core activities.”

Core activities

Other innovative projects at DHL Solutions include a pilot test with bluetooth pens in Denmark and voice warehouse management for speeding up the order picking process in warehouses. “We also launched the after sales logistics product for high-tech industries which is already being used by a number of multinational customers,” Flickinger said.

From its base in Europe, the division is looking for growth in target industries in the growth regions of North America and Asia, he explained. “The market for contract logistics continues to grow in North America. In Europe, we consider Russia and Turkey as highly interesting new markets,” he continued.

The electronics, telecommunications and fast moving consumer goods sectors are providing DHL with growth worldwide. And lately, new business in the USA, France, Germany and the Netherlands has led to increased volumes. **PH**

More info at www.dhl.com

Moving another box – last year DHL carried 20% more TEU by sea



Moving the freight – DHL carries nearly one million TEU

Logistics deliver for Kaohsiung

A case study shows how a logistics solution has improved the throughput of a major Taiwan container terminal

A new terminal operating system has helped APL Kaohsiung optimise equipment, land, and container moves to shorten vessel turn around times and increase throughput so the terminal could accept more business.

Investment in the Navis terminal operating system (TOS) increased productivity and lowered costs, according to Tomy Hong, terminal manager at APL Kaohsiung. "TOS helped optimise our processes, improve productivity and increase flow throughout the terminal with no glitches or bottlenecks," he said.

Increased costs had been justified by the improved efficiency and optimisation, he claimed.

Labour costs down

In the three years from the introduction of TOS, APL Kaohsiung reduced operational staff costs by 15%. Whereas before it used multiple systems to meet the terminal's many different planning requirements, the Navis software helped integrate these multiple systems and simplify a mammoth workload to a more sizable and realistic task.

For example, before the software was implemented, the planners would go through different combinations of transactions among multiple systems to support varied requests by customers. With the Express element of the software, only one transaction is required to satisfy the various combinations of multiple systems, significantly increasing staff productivity.

Re-handling reduced

APL Kaohsiung uses SPARCS ExpertDecking to assign containers to yard locations, lower labour costs and

minimise container reshuffling.

In place of manual planning, Hong said the system was now automated. "SPARCS ExpertDecking helped us decrease reshuffling work hours by 22% in 2004. The Navis software helped us work smarter with less manpower and lower costs."

Crane monitoring

The SPARCS Quay Commander module enables APL Kaohsiung to create a solid crane work schedule that can be updated quickly with real time information on crane operations. Quay Commander tracks productivity, dynamically adjusting load and discharge time estimates for each container and generating automatic crane sequences.

"We would run into trouble if one of the cranes failed. During manual operation, the interruption would be destined to disrupt performance," Hong continued. "But the software has erased those concerns and has helped us plan schedules more efficiently with a lower probability for margins of error."

Before using Quay Commander, planning crane schedules was a laborious, manual task for APL Kaohsiung that required a significant amount of time. Now, Quay Commander instantly reveals the impact of every decision, including the finish time for each crane, crane bumps and impracticable sequences.

Streamlined planning

Hong said the scene at APL Kaohsiung was one of chaos and confusion for vessel and yard integrated operations before SPARCS AutoStow was implemented. Work orders were dispatched by several people and were recorded by marking on endless hard copies of stow plans.

"AutoStow enables APL Kaohsiung to stow one bay at a time – or the entire ship – by combining stowage factors like type and weight with yard constraints and operating strategy to select the best container to load in real-time.

"Now, a single controller dispatches work by a simple click here and a simple click there, and all the container handling equipment operators simply follow the instructions that appear on their radio data terminal," Hong said.

Safety features

"I would like to emphasise some basic features on the Navis system such as real time data, graphic icons, vessel stability report and live recaps, which are powerful tools for users to create perfect stowage plans. A perfect stowage plan is the key to a ship's safety and helps to minimise re-handling and avoid service failures.

"At APL Kaohsiung, we use cutting edge information technology to deliver the greatest possible value to our customers," Hong concluded. **PH**

More info at: www.navis.com/kaohsiung.jsp

The package

Software products:

■ SPARCS including: ExpertDecking; Quay Commander; AutoStow and Express

Business Results:

- Increased total average moves per hour from 28.55 to 35.15 – a port record
- Managed more terminal volume using only six of seven cranes
- Decreased re-handling by 22%
- Reduced staff cost by 15%

Throughput:

- 1,200,000 TEU in 2003
- 1,300,000 TEU in 2004
- 18 vessels per week

Improving quality in Indian shipping and logistics

Joe Mustan told INMEX India how technology is expected to change the transport chain



We can only examine quality in shipping and logistics in India in the context of the country's infrastructure and the chain of responsibility. In India, the common quality problems experienced are as much to do with shortcomings in the overall transport network as they are to do with the actions of individual operators.

A number of India's major ports are currently handling throughput which exceeds their design capacity – especially Nhava Sheva and Chennai.

Tsunami

Last year's tsunami disaster hampered operators ability to move containers and cargo swiftly in and out of Chennai, leading to weeks of congestion. The number of rail accidents also calls into question India's ability to move freight over efficient and reliable rail networks. Quality suffers every time cargo gets damaged, delayed or misses its planned schedule.

A growing number of large logistics service providers in India are today very capable in process management, but many others have yet to improve their service delivery capabilities. And there is a lack of co-operation between many Indian logistics players. The result? Lost time, unnecessary duplication and redundant data capture translating into inefficiency in time and cost units.

India's transport links need to catch up with its trade



So what can be done to address these challenges and improve India's shipping and logistics?

In terms of the chain of responsibility, the government is doing the right thing by seeking input from all sectors towards its national maritime policy. Similar efforts by industry organisations to set up national committees on shipping, transportation and logistics are also laudable. Players within the same sector or industry, and across sectors, need to be brought together to promote dialogue, evaluate operating processes, seek out inefficiencies and promote co-operation to improve the economic viability and quality of the whole business ecosystem.

This co-operation and sharing of insights between business and government will lead to better planning and preparation for future growth.

Ports' council mooted

A national ports' council is needed to plan and spearhead port development in the country, along with a multi-agency disaster relief and recovery plan to be put into effect anytime a situation warrants it. While people and security are first priority for such plans, we also need to address cargo movements, infrastructure and logistics as soon as possible.

Both government and industry need to create awareness and promote consolidation within the fragmented levels of transport, warehouse and customs brokerage providers. To compete with the world, India needs to build quality products and services.

In conclusion, the quality of shipping and logistics in India is poised for major change. The speed of progress will rely on continuing dialogue between government, industry leaders and the community at large. India must strive for higher quality products and services in all areas from factory to customer, and across all modes of transport and operating platforms. **PH**

Joe Mustan is managing director, Indian subcontinent, of APL Logistics. More info at www.apllogistics.com

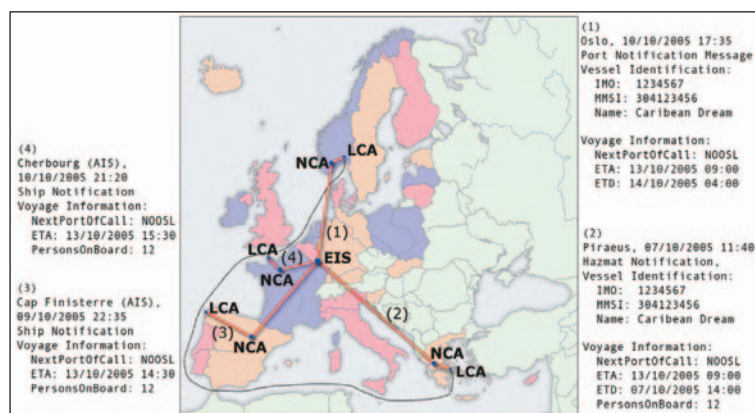


A safe 'seanet' around the EU

Heiner Lamprecht explains how ports will benefit from the EU's new vessel tracking and monitoring system

The European Union's SafeSeaNet vessel tracking monitoring and information system could be fully operational next year if all member states link to the system as hoped.

The European Maritime Safety Agency (EMSA), which has SafeSeaNet under its control, wants to develop the system into a European platform for the exchange of all maritime data on vessels' movements and cargo.



Belgium signs up

Belgium is pressing ahead with SafeSeaNet. The Shipping Assistance Division of the Ministry of the Flemish Community has awarded a contract for the construction of the new Belgium Maritime Rescue Co-ordination Centre (MRCC) in Ostend to a consortium made up of Barco, Tein Telekom and Fabricom GTI. The consortium is headed by Barco which is integrating search and rescue and other aspects into SafeSeaNet. The centre will link all Belgian seaports and inner harbours to SafeSeaNet when it is operational in early this year (2006).

Information to SafeSeaNet is filtered so no commercially sensitive material goes through

“ The system is a central contact point for gathering and circulating information, facilitating the collection of information for ports ”

Other organisations such as customs, immigration and environment authorities, plus security services, are to be linked as well, and in the future it is possible that long range identification and tracking (LRIT) may be too.

Improving safety

The EU-wide vessel traffic monitoring and information system was proposed following the loss of the tanker *Erika* off the French coast in 1999, with the aim of improving the safety and efficient movement of maritime traffic. SafeSeaNet is also aimed at helping to monitor both the provision of port reception facilities for ship waste and the progress of port state control inspections in EU ports. In addition, Norway and Iceland have been included in the plan.

EU member states have now been asked to enhance the SafeSeaNet framework to a single window service for ship masters and operators – called the ‘one stop shop.’ All reporting tasks are to be combined under one roof in order to facilitate the process as much as possible.

Information for ports

SafeSeaNet is a central contact point for gathering and circulating information. Exact and automated reporting and vessel position finding will help ports identify hazardous vessels, those that are delayed and help to avoid pollution incidents.

The exchange of reliable information on the system will include a vessel's history of accidents, pollution, breach of navigation regulations or hazardous cargo carried. This will help port authorities detect problem vessels and take prompt action to deal with them.

From the beginning, SafeSeaNet was designed as an open system using tools such as the Internet

so future developments and requirements could be easily included.

How it works

As soon as a vessel has registered at its destination, a notification message is sent from the port to SafeSeaNet that includes estimated time of arrival and departure and the number of persons on board.

Vessels carrying hazardous goods send a HAZMAT notification message to the network. Details of the cargo, the port of departure and the scheduled port of discharge are then available. Route changes are notified and different VTS systems regularly transmit information on vessels' current positions to SafeSeaNet.

Avoiding delays

As the voyage progresses, updated arrival times are transmitted. The destination port can then access this information to manage its berthing allocation if there are delays to a vessel's arrival. Details of vessel inspections will be available so ports can easily identify high risk vessels and determine which to inspect.

After an accident at sea, the local authority would have access to information on any damaged vessel and its cargo from the HAZMAT notification. Within a few minutes, local operation controllers will have detailed information on the type and quantity of hazardous goods and the number of persons on board the damaged vessel. **PH**

Heiner Lamprecht is a project manager for Belgium-based Barco and is responsible for the connection of the new MRCC to SafeSeaNet. Barco designs and develops solutions for vessel traffic monitoring, maritime rescue and co-ordination and coastal surveillance systems.

More info at <http://europa.eu.int> and www.barco.com

Ultra-low sulphur diesel used in terminal operations

One port's story of the introduction of 'green' equipment

Clean moving: low emissions from Tacoma's straddle carriers

In a voluntary, proactive decision to protect Puget Sound air quality, the Evergreen Group has announced that all diesel-powered equipment at the Port of Tacoma's Pierce County Terminal will use ultra-low sulphur diesel (ULSD) fuel.

Evergreen's announcement came just months after the Port of Tacoma Commission decided that all diesel equipment at port-operated facilities will use ULSD fuel. While the decision increases Evergreen's operational costs, use of the more expensive fuel has tangible benefits for the environment and the community.

"Ocean carriers and their port/terminal partners must be proactive in using the latest technology as soon as it is available to minimize the impact of container shipping operations, both on marine life and on port communities," said Evergreen group chairman Dr. Y. F. Chang.

Ted Bottiger, president of the Port of Tacoma Commission, explained that the use of ULSD reduces sulphur dioxide (SO₂) emissions by 97%, enabling the Puget Sound region to meet clean air standards.

Ultra-low sulphur diesel is not yet readily available at all North American ports. However, US Oil – adjacent to the Port of Tacoma – is a major ULSD refiner and supplier which users can take advantage of.

For both Pierce County Terminal and at Tacoma port-operated facilities, the major users of diesel fuel are straddle carriers.

Serving ocean carriers Evergreen Marine, Hatsu Marine and Lloyd Triestino, the 171-acre Pierce County Terminal utilises 34 straddle carriers. The Port of Tacoma, meanwhile, operates 38 straddle carriers at Husky Terminal, Olympic Container Terminal and the port-operated North Intermodal Yard.

Classified as non-road vehicles, straddle carriers have a SO₂ emission standard of 5,000ppm (parts per million) set by the US government. This limit will lower to 500ppm in June 2007. And a SO₂ limit of 15ppm becomes effective in June 2010 for non-road fueled vehicles, such as straddle carriers.

According to Cindy Lin, the port's manager of environmental compliance, use of ultra-low sulphur diesel means that Evergreen and port-operated diesel equipment meet the 2010 standard already.

Evergreen's new generation of "green" ships are



also calling at Tacoma. The ships include a range of features such as:

- The ability to shut down all shipboard generators while in port at terminals equipped with shore-based electricity
- Fuel tanks to minimize the risk of oil pollution or fire as a result of grounding or collision
- High-capacity oil-water separator reducing oil content of waste water to 15ppm
- Large holding tanks to avoid discharge in sensitive areas and maximise the amount of waste held for disposal at specialised shore facilities
- Enhanced holding tanks for 'grey water' (waste and sewage)
- Main engines and generators operate on low-sulphur fuels
- Advanced underwater hull coatings that have no detrimental affect on marine life. **PH**

More info at www.portoftacoma.com and www.evergreen-marine.com

Alameda Corridor leads to air quality benefits

A major study in the US found that a more efficient traffic infrastructure around the ports of Los Angeles and Long Beach cut air emissions in the region

More trains but less pollution – the Alameda Corridor has also alleviated traffic congestion

Traffic improvements in the Alameda Corridor have produced significant air quality benefits to the south coast air basin (SCAB) since its opening in 2002, according to a study commissioned by the Alameda Corridor Transportation Authority (ACTA).

Designed to improve the efficiency of transporting cargo from the Los Angeles and Long Beach ports to the rest of the nation, the Alameda Corridor's operation has also resulted in significant air emission reductions.

According to the ACTA study, the emission reductions were the result of a series of measures, including the consolidation of freight rail operations and the alleviation of traffic congestion at the more than 200 rail crossings in the region.

ACTA also reported that the performance of the Corridor has steadily improved over its first three years of operation. The total number of trains using the Corridor has increased from just over 14,000 in the first year of operation to more than 16,000 in the third year – up 12.5%.

The number of containers transported via the Corridor has increased by nearly 34% since 2002, from 4,117 per day to 5,514 per day in 2004.

Quality of life

"This report proves that we can move goods, accommodate growth and still continue to improve our air quality", said Los Angeles City councilwoman and immediate past ACTA chair Janice Hahn. "The Alameda Corridor is not only allowing us to move goods more efficiently, it has improved the quality of life for people living in the harbour area and throughout the region."

"Our air quality should continue to be our priority and I am counting on ACTA to continue to lead the charge."

The recently completed Air Quality Benefits Report reviewed various factors associated with the Corridor's operation, including:

- Consolidation of pre-existing rail lines into one direct route downtown
- Elimination of potential accidents at more than 200 at-grade crossings
- Elimination of vehicular and mass transit wait times at grade crossings and
- Increased rail efficiencies that allow more cargo to be transported by rail.



The report found that there will be more air emission reduction in the future from better utilisation of the Corridor, because trains generate significantly less pollution than the number of trucks (250-280) needed to move an equivalent volume of cargo.

It estimated that in the first three years of its operation, the Alameda Corridor's air quality benefits to SCAB included:

- Elimination of 3,863 total tons of pollutants
- Reduction of 1,169 tons of nitrous oxide (NOX)
- Reduction of 49 tons of particulate matter (PM10)

The ACTA study also assessed the projected air quality benefits that will result from operation of the Alameda Corridor into 2012. The analysis determined that by then total emission reductions would amount to 4,142 tons of pollutants, including 3,236 tons of NOX and 45 tons of PM10.

At the port

The projected air quality benefits assume increased use of on-dock rail facilities and completion of a new near-dock rail facility. Benefits would be even greater if ACTA introduces a proposed shuttle train service.

"Once implemented, ACTA's expanded mission will address the steady increase of cargo moving through the ports while continuing to reduce air pollution and traffic congestion," said Long Beach City council member Frank Colonna, who has just taken over as ACTA chair.

The plan includes developing a four-lane elevated exprewssway on State Route 47 to alleviate truck congestion; implementing a shuttle train demonstration project; and working with the private sector to develop an inland truck depot. **PH**

More info at: www.acta.org

Keeping clean

Peter Hinchliffe from the International Chamber of Shipping outlines the uncertainties facing the industry as international emissions rules face revision



“ Agreement must be on a global basis as ships cannot operate efficiently if faced with a plethora of local or regional regulations ”

As recently as 10 or 15 years ago, the shipping industry might have claimed, with some justification, that in terms of atmospheric pollution it was the clean transport industry, contributing significantly less than other modes in terms of its market share. The intervening years, however, have witnessed a steady improvement in the air emission standards of other transport modes, whilst the shipping industry could be said to have rested on its laurels, now finding itself vulnerable to some criticism.

The main focus of the shipping industry has necessarily been on MARPOL Annex VI which, after years of industry pressure to this effect, finally came into force in May last year. The main stumbling-block is that the text of Annex VI was adopted in 1997, and the delay on the part of states to enforce it has ensured a stagnation of its provisions which now burden industry with regulations ten years out of date.

Whilst the shipping industry may not always have been as quick to take initiatives as it perhaps should, the criticisms leveled against it over atmospheric pollution are often unreasonable when taken in context, and the situation concerning bunker fuel sulphur content neatly exemplifies this.

Criticism

During the initial IMO debates on MARPOL Annex VI, ICS pressed for a much lower maximum sulphur content than the 4.5% finally agreed, rightly forecasting that the level of sulphur in marine fuel would arise as a subject of criticism for the shipping industry. Unfortunately, oil industry interests held sway, arguing that 4.5% was the realistic minimum, ignoring the fact that the global average was well below that figure.

The 'reduction' of the lower maximum content to 4.5% brought about by the entry into force of Annex VI inevitably invites derision from environmentalists, though the Annex's provision for SOx emission control areas (SECAs) does provide for the adoption of lower sulphur limits, the North Sea and Baltic having already been thus designated. The very inadequacy of the global standard as a whole has given rise to unhelpful regional regulations in Europe and the USA that are more stringent than those adopted for the SECAs.

That said, the situation is not all bad as regards emissions: one could argue that the shipping industry's estimated 5% contribution to global emission of CO₂ is very modest when set against its 90% share of international trade by weight (and the 40% of global CO₂ emissions for which the United States is responsible). But improvement, not absolutes, is today's statistical goal, and this is something that must be recognised.

Sensitivity

The shipping industry is well aware of the sensitivity of the atmospheric pollution issue and will play its part in addressing the factors, whether exhaust emissions, cargo vapours or ozone-depleting substances.

Agreement must be reached, however, on a global basis – industry is willing to accept its responsibility in addressing environmental demands, but the debate has to take full account of the fact that ships, unlike power stations, are mobile and cannot operate efficiently if confronted with a plethora of local or regional regulations such as are already witnessed in Europe.

If the EU adopts its new standards before IMO, other national authorities might be tempted to adopt their own unilateral requirements. Moreover, complaints by the European parliament about the time taken for the IMO rules to enter into force have a certain irony given that many EU member states have still not ratified MARPOL Annex VI themselves.

There are several efforts that could be undertaken to improve emissions standards without recourse to unilateral measures. Now that IMO is to review the provisions of Annex VI, it is of prime importance that more states ratify it with expediency. A sporadically implemented regulatory framework can only act as an impediment to progress, as the air emissions issue proves.

Coincident with this increased ratification and enforcement, states must enter into the debate so as to agree amendments that bring the Annex into line with modern emission control expectations and environmental needs. All of this activity must be undertaken through IMO.

Technological and economic solutions should be sought in the context of revising MARPOL

regulations, taking into account the practicalities of the situation worldwide without allowing debate to be sidetracked by localised concerns.

Exhaust scrubbing is one possible mechanism to reduce harmful emissions and is provided for in regulation IV of the Annex. However, the issue of discharging the scrubbing effluent in port, and to port reception facilities, will need to be addressed universally.

Similarly, emissions trading – the practice of selling excess emissions allowances between ships up to any imposed limit – may offer a flexible solution to addressing emissions problems. The economic practicalities need first to be empirically studied in the context of similar exercises with shore based industry.

Alternative maritime power

Alternative maritime power, or 'cold ironing' the provision of shore electrical power to ships at berth, needs further study. Whilst initially attractive, it is important to ensure that the transfer of electrical generation ashore is in fact environmentally beneficial. There are obvious issues regarding the amount of power required for cargo operations and with the integrity of the power supply.

Ships are not able to parallel up and accept shore electrical supply without shutting down completely. The high energy demand of a refrigerated container ship whilst alongside can be easily imagined.

It is clear that, in its current form, Annex VI does not adequately address the issue of atmospheric pollution from ships, and that its amendment in order to meet present global emission requirements is a priority. ICS actively promotes compliance with international instruments that seek to reduce harmful emissions from international shipping and contributes in the debate to establish further reductions in them. If realistic and universally applicable measures are to be concluded, however, IMO and states must implement the current measures whilst at the same time ensuring there is not excessive unilateral legislation.

ICS is anticipating a lively debate on the revision of Annex VI and is looking forward to a conclusion that is effective, practical and sustainable. **PH**

More info at www.marisec.org



World trade boom delivers port inventiveness

Bridget Hogan explains how three IAPH members found solutions to congestion problems through individual initiatives

World trade is growing, the size of vessels is increasing, yet ports and the links that service them have been struggling over recent years to cope.

Chinese manufacturing continues as a key driver of world trade to the extent that container vessel operators are now facing their fourth year of above-average, double-digit growth, carrying about US\$500Bn of world trade.

China booms

Intra-Asia trade is the fastest-growing of the six major global container trade lanes. The others are the trans-Pacific, trans-Atlantic, Asia, Europe, and the north-south trade lane. Trade from China to Latin America is also booming and expected to increase significantly throughout 2006.

According to data from China's Customs General Administration, the country's total import and export value increased 24% to reach US\$1,148.6Bn in the first 10 months of 2005, nearly the same as the total for the

whole of 2004. Exports were valued at US\$614.5Bn, up 31.1%, and imports rose by 16.7%, with a continuing upward trend.

According to the latest survey from the United Nations Conference on Trade and Development (UNCTAD) in Geneva, world container carrying capacity increased 17% between 2004 and 2005.

UNCTAD says China's assignment of container capacity increased 13.1% over that time. These vessels are mainly employed in export trades, and the largest of these trades is across the Pacific to West Coast North American ports.

Ports struggling to cope with this huge expansion have another consideration to take into account – increasing frequency of services and the introduction of ever larger vessels.

UNCTAD estimates that container services around the world increased in frequency by 3.3% – but those to and from China grew by a massive 10.9%. There are now nearly 1,000 liner services from the country's ports, it estimates, although this is nearly doubled if the more than 700 services to and from Hong Kong are factored in.

World trade indicators

Global economic growth in 2004 was probably as good as it gets, but results for 2005 and predictions for 2006 and 2007 still look pretty strong.

Experts agree that assuming protectionist policies



Beating the congestion: trucks work round the clock under the PierPASS scheme introduced at Los Angeles and Long Beach

were kept at bay, oil prices remained manageable and China's growth did not slow dramatically, global trade flows would hold up.

Global GDP is forecast to grow 4% this year and perhaps slightly higher in 2007 if oil prices retreat from end 2005 levels.

Seaborne trade in commodities like oil, grains, iron ore and coal has nearly tripled in the last 30 years to over 6Bn tonnes of cargo in 2003 with dry commodities growing most.

Growth in emerging markets of more than 5% in 2005, though less than 2004's 6.6%, was still firm historically speaking and growth forecasts will continue to buoy ocean trade.

China factor

In September, the International Monetary Fund forecast world growth of 4.3 % for 2005 and 2006, well above the long-term average.

Chinese economic growth, one of the single biggest factors behind record-breaking freight and commodities prices, has increased by an average of 9.4% since 1993 and still looks likely to continue to increase in 2006.

"China's trade surplus is now 60% of GDP, the highest in history," Ling Zhou, of the Royal Bank of Scotland's structured ship finance group, told Ports & Harbors.

She said that the government's policy of RMB appreciation will not have an adverse impact on China's exports, which will continue to rise. "China is the world plant," she declared.

Time was when the answer to all this trade expansion was a simple one – albeit expensive – to build a new terminal or port.

But the expansion of earlier years has taken its toll. Ports have moved from the centre of cities to the fringes, and then miles away down estuaries in many instances. They positioned themselves well for past expansion, but now many have no land left and no quick answers to further development.

At the LA EXCO meeting in Los Angeles late last year, three IAPH members, Shanghai, Hamburg and Long Beach, all outlined their own individual efforts to cope with the congestion they have faced.

Shanghai – smooth as silk

"Global sourcing and booming foreign trade place higher pressure on ports," said Mr. Lu Haihu of Shanghai International Port Group (SIPG). "Upsized vessels stay longer in ports and hub ports are facing

“ Container vessel operators are now facing their fourth year of above-average, double-digit growth ”

more challenges of capacity constraints.”

He says there is limited space for expansion of the distribution networks around many ports. And points out that in Asia the problems have become particularly difficult as the world's largest port groups located there make up 51% of the global market.

China's ports have had to cope with the huge increase of trade generated by the globalization policies introduced by president Fu Jintao and from the country's entry into the WTO.

He pointed to studies by Drewry Container Market Review which show that while global container trade is expected to increase by 10% each year, ports in the Far East and China will see growth rates at 13% and 16% respectively.

By 2004, the foreign trade volume in Shanghai exceeded US\$280Bn, accounting for one third of the Chinese total – a 158% increase on 2003. Container trade through the port reached 14.55M TEU, a 159% increase over 2000.

All this adds up to an annual growth of container traffic through Shanghai of about 25% to 30% each year in the 21st century.

And the response from Shanghai? A massive building programme costing some US\$12Bn to build a deepwater port about 30kms from Shanghai. Late last year phase I of the Yangshan Deepwater Port was opened, adding five deepwater berths with a capacity of 2.2M TEU.

By 2020 the port will have 52 berths giving it a handling capacity of 20M TEU per year, or half of the throughput expected in the Shanghai region.

All the major port terminal operating groups are believed to be interested in contributing to the project. Late last year Hutchison Port Holdings (HPH) signed a joint-venture agreement with SIPG, APM Terminals, COSCO and China Shipping Group to jointly develop phase II of the port. A total of 64 hectares will be developed with a quay length of 1,400m and a depth exceeding 15m. Four berths will be capable of handling the latest generation of mega-vessels.

Improvements at existing facilities, outlined by Lu, include additional cranes and dredging projects which increased the draught from 8.5m to 10m enabling large vessels of 5,000 TEU to come into the port.

He concluded: "Port congestion is a common challenge faced by every port. Through the platform created by IAPH, we believe we can benefit from each other's experiences and find better solutions."

China's leading trade partners:

■ EU – US\$176.3Bn ■ USA – US\$172.3Bn ■ Japan – US\$149.8Bn

China's main trading areas:

Three regions account for 59% of China's total imports and exports with trade valued at:

■ Guangdong province US\$340.7Bn, up 19.7% on last year;
 ■ Jiangsu province US\$185.1Bn, up 35.0%;
 ■ Shanghai province US\$152.2Bn, up 16.5%

Container links

Singapore is now served by nearly 900 services,

■ Korea by 560	■ Japan 540	■ UK 503
■ Netherlands 498	■ Germany 474	■ Taiwan 437

Last year, average vessel sizes increased by 9.3%, with ports in at least 15 countries having to accommodate vessels larger than 8,000 TEU – an increase of 50% on 2004, said UNCTAD.

Its findings show that the maximum vessel size increased by 9.5% between 2004 and 2005. "The largest ship recorded to provide regular liner services in July 2005, had a reported carrying capacity of 9,200 TEU, an increase of 11.7% compared to maximum of 8,238 TEU in July 2004," says the report.

Handling more at Hamburg

Hamburg has dedicated US\$1.2Bn for expansion in the next five years, doubling handling capacity to 10M TEU. Wolfgang Hurtienne, head of Hamburg's port planning division, explained capacity had been boosted at the Altenwerder terminal to 2.5M TEU and will be expanded to 3M TEU in the future. The CTA terminal is nearly complete and is handling growing volumes, with 3M TEU capacity this year.

The port authority is planning another container terminal in the Mittlerer Freihafen area. Dredging will start in the Elbe in the next year to accommodate vessels with a draught up to 14.5m.

In the meantime, more rail services have been added to existing facilities and feeder carriers are working together by slot-swapping, to reduce berth duplication.

Hurtienne explained how, after expansion, the Altenwerder terminal now extends over 850,000m², with a quay length of 1,400m. There are 16 more gantry cranes at the terminal, 14 of which are super-post-Panamax, with two others for feeder vessels.

About 60 unmanned platforms and 22 automatic portal cranes have been brought in – so there are two for each lane in yard operations.

Yard capacity has been boosted to 30,000 TEU with 1,600 reefer plugs, Hurtienne continued. There are now six railway tracks, with six railroad sidings providing 4.5km of railways on site. These are served by four transtainers, each serving six tracks.

At the HHLA Container Terminal Burchardkai, annual capacity is to be boosted from 2.6M TEU to 5.2M TEU once developments are complete, he continued. The 1.6M sqm terminal now has a quay length of 2,850m with 18 gantry cranes, nine of which are post-Panamax and three super-post-Panamax.

The terminal has 100 van carriers and 900 reefer plugs. Nine railway tracks with 4.4km of railroad sidings and four Transtainers are on site.

Hamburg's Senate has now approved a dynamic port development plan which will see about €750M spent to create capacity for about 18M TEU by 2017.

The current handling capacity predictions foresee the cargo volume through the Port of Hamburg doubling by 2015 to about 222M tons and over this time it is estimated that containers handled will increase from 7M TEU today to 18M TEU in 2015.

According to Hurtienne, the Hamburg State plan will allocate investment of €262.4M in the development of the port infrastructure up to 2009. When added to the funds previously earmarked, a total of €746M will be invested in the port between 2005 and 2009.

Hamburg will have to reach a decision before 2010 on whether or not to construct another container terminal at Moorburg. Construction could then take place between 2010 and 2020, providing the port with extra capacity of between 3M and 5M TEU.

Alternative strategies

Los Angeles and Long Beach came up with an alternative strategy of dealing with huge increases in container throughput which did not require building new facilities, the meeting heard.

The ports set up PierPASS – a scheme to encourage trucks to use the terminals out of hours, explained CEO Bruce Wargo. By late 2004 vessels were waiting 50-60 days to discharge cargo so the management had to move swiftly to make better use of the port's existing facilities rather than build new.

Wargo said that projections from port of Los Angeles and port of Long Beach put future container handling levels at 14.5M TEU in 2005, 19.7M TEU in 2010 and 36M TEU in 2020 – up from 13.1M TEU in 2004.

There was no building land for extra terminals, no time nor budget for road widening or bridge replacement, he added.

The answer – fund a reorganised port working so cargo owners and truckers could work off-peak, which Wargo confirmed has created terminal capacity and predicts that volumes could increase by 8%-10%. "Reducing truck congestion creates efficiencies," he declared. The programme was called OffPeak.

Now, gate volumes at the port are consistent with between 9,000-11,000 trucks handled each night and two-thirds of the port's volume handled between the hours of 6pm to 10pm. There is now more traffic between 11pm to 3am.

He summed up the success story of PierPass in this way: In the first nine weeks of operation, there were 460,000 trucks handled with 30%-33% of truck traffic going to the OffPeak gates.

The truck movements shifted to the off-peak times, relieved daytime traffic congestion inside the ports and surrounding roads. And two-year forecasts for the programme were exceeded in the first two months.

He acknowledges the challenges for the future. There will be a need to improve truck handling; keep costs in line at all terminals; maintain port and community support and ensure the computer systems and accounting keep up, he said.

The programme's unexpected rapid growth means that the target for the two ports to move 40%-45% of their cargo during off-peak hours by July 2008 will almost certainly be reached sooner, he claims.

With PierPASS in place and cargo moving smoothly, Wargo is projecting that the two ports will log an overall 7%-10% increase in cargo for 2005 compared with 2004 and more increases in 2006, so the reducing the threat of congestion. **PH**



Containers transit Poland – one of the countries the report says could expand facilities

Capacity 2015 – squeezing traffic into Europe's ports

Kathryn Bell explains how strategic port and terminal development could help solve congestion in an expanding European Union

The findings of a comprehensive transport study into the use of strategic transport corridors in Europe over the next decade predict a dramatic increase in road haulage and future strain on the transport system.

As the European Union continues to expand, this transport system will become increasingly congested, especially in Eastern Europe. As such, the report concludes that one of the main solutions to this problem will be in strategic port and terminal development in the north and on the Adriatic.

The Capacity 2015 study – known formally, if unsnappily as 'A Strategic Assessment Of The Future Capacity Of Continental Transport Corridors' – was

undertaken by BMT Transport Solutions GmbH on behalf of 16 European governmental and commercial organisations.

During nine months of research, the future strategic use of transportation corridors between Scandinavian and central European countries was assessed to establish the level of increased congestion in the region, but also with the view to finding practical solutions that would facilitate trade.

In a nutshell, growth in world trade, an increased use of larger vessels and a lack of sufficient port infrastructure and hinterland transport are causing congestion in Europe, a problem exacerbated by the expansion of the EU to the east, where appropriate

“ Port development will reduce congestion only if ports are developed in the right place ”

transport infrastructure is yet to be developed.

This situation is unlikely to change for the better any time soon. Forecasts predict that EU trade will continue to expand eastwards, with growth expected to remain stronger than in Western Europe. Relocation of production and manufacturing activities to the cheaper east is also expected to continue.

BMT has developed an advanced freight transport flow modeling and simulation software system, EFM-STAN (European Freight Model) covering the whole of Europe, which can evaluate the impact on congestion of changes in infrastructure, regulations, competing services and demand patterns.

It's also capable of simulating and calculating potential freight flows, shifts in transport mode and route choices, enabling a more accurate assessment of Europe's congestion problem.

Funding for growth

The Capacity 2015 study indicated that annual trade volumes in Europe are forecast to grow by 45% between 2003 and 2015. It also concludes that east-to-west trade volumes are likely to increase by 71%, whilst on the north-south axis, growth rates are likely to be just 39%. These findings suggest where the future bottlenecks will be and this can assist with development plans for certain strategic corridors.

Furthermore, the study focused on the growth of freight transport by truck and the likely effects of different road pricing levels on the use of European motorways. It found that there would be a 58% increase in road haulage within 10 years if existing policies and infrastructure investment levels were maintained.

A particular concern for transport planners was the discovery that infrastructure improvement programmes may not provide adequate relief from the problems caused by insufficient network capacity.

Simulations in the project showed that improvements in road infrastructure, without the implementation of road pricing, would actually increase freight transport by road by 93% in the selected corridors. Thus, the bottlenecks will still occur, particularly in densely populated areas.

Road pricing

According to the study, road pricing schemes were found to play a critical role in achieving a better balance between the uses of different modes of transport. In particular, they would encourage haulage firms to shift some freight off the roads and onto trains, inland waterways and short sea shipping routes.

If road tolls of €0.15/km were introduced and combined with the road infrastructure improvement programmes, the increase in the volume of traffic would drop from 93% to just 75%, the reports said. If

the toll was set at a slightly higher rate of €0.30/km, the increase in traffic would be just 56%.

The results of the Capacity 2015 study underline the need for incentives for the freight industry to use a variety of modes of transport in a more strategic way if bottlenecks are to be addressed over the next decade.

Lars Källström, managing director of BMT's Transport Solutions, said: "with trade volumes in Europe and road haulage on European motorways set to increase, transportation policies and investment must be targeted at providing long-term solutions to ensure that Europe's transport networks promote economic growth in the future."

Motorways of the sea

According to BMT, another key way to alleviate some of the pressure on the hinterland in eastern Europe is the increased use of the EU's 'motorways of the sea' concept in the Baltic Sea area. Daily transport services, increased port capacities and improved hinterland links, will spread traffic more evenly.

BMT concludes that market forces will drive strategic port and terminal development in the Polish, Baltic and Adriatic Sea regions.

"We see that more and more ports in the northern range are expanding their capacities – by which I mean that they can berth and serve more vessels – but at the same time the infrastructure linking those ports to the customers is becoming more and more clogged. This is particularly true for the roads, of course, but even more for railways, as the study points out," says Richard Szuflak, director of European operations for BMT Maritime Consultants.

Developing in the right place

"Port development will reduce this problem only if ports are developed in the right place, in places where customers could be reached within a reasonable distance and with predictability," continued Szuflak.

"We believe that ports in the north – Poland and the Baltic States – as well in the Adriatic, particularly Croatia and Slovenia, have a solid potential for growth because they are largely out of the main streams of traffic. This is also because their inland infrastructure is less congested and because most of the roads are new."

BMT Transport Solutions' EFM STAN tool can help ports identify their logistics advantages and also the advantages (and problems) of competitors, enabling port operators to establish how attractive their port is and ways to improve it in order to attract higher volumes of traffic.

The results of the Capacity 2015 study will be used by the EU and industry project commissioners and inform future policy decisions on the best way to address what is likely to become an increasingly challenging issue in the future. **PH**

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Mergers spell uncertainty for ports

New routings and schedules will emerge with some ports losers and some winners, as

Bridget Hogan explains



The new Maersk Line will have a capacity of nearly 1.5M TEU

Ports around the world are facing an era of uncertainty, as schedules change following the emergence of mega carrier Maersk Line and co-operation between The Grand Alliance (TGA) and The New World Alliance (TNWA).

Although both developments were mooted for some time, the full implications seem to have caught many in the industry by surprise. The impact on ports has not yet been confirmed and is likely to evolve in the coming months.

The mergers of Maersk Sealand with P&O Nedlloyd (RPNL), and of CP Ships with the parent of Hapag-Lloyd have led to consolidation on a scale the industry has never seen before.

Radically different

The New Year starts with a radically different shipping industry faced by those who serve it – including ports. Three major shipping companies now account for about 50% of the industry's capacity.

Maersk Line is a massive industry company combining carriers previously ranked one and three. Once the merger is complete, probably next month, it is estimated that one container in five in world trade will be carried by a Maersk Line containership.

Hapag-Lloyd and CP Ships are also merging, as are reefer operators LauritzenCool and NYK Reefers, to make the second biggest operator in that field.

Maersk Line will operate some 540 ships with a capacity of nearly 1.5M TEU. Its orderbook amounts

to 138 vessels with a total capacity of 730,000 TEU including container vessels with individual capacity of over 8,000 and possibly as much as 15,000 TEU.

These vessels will work with Maersk's hub & spoke service structure, possibly with fewer mainline port calls. Maersk has only participated in joint services reluctantly if there is no alternative, in limited volume north-south trades, for instance

New links

Lines are busy introducing new or upgraded links. These include a new service linking Asia with the US east coast, at least two new services on the Asia-Europe trade, three transpacific routes, replacement of RPNL's round-the-world services with a new transatlantic service linking Europe, a US-to-Australia/Oceania service and new South American routes.

The two operator alliances set up a new joint service to compensate for the withdrawal of RPNL ships from the all-water service between Asia and the US east coast via the Panama Canal. Other co-operative agreements look set to follow which will involve port switches as RPNL ships are withdrawn from services.

In addition, Kawasaki Kisen Kaisha, (K Line) and Mitsui OSK Lines (MOL) have decided to continue calls linking Asia, Mexico, and the west coast of South America in a new joint service called New Andes. The lines will probably continue to serve established ports on the Mexican and South American west coast.

Calls dropped

Uncertainty surrounds the plan by TNWA members to start a new weekly all-water service from China to USA South Atlantic ports with eight vessels within six months. TNWA may drop some calls at south Atlantic ports because ships in the new joint service with TGA make those calls. TNWA will have more capacity for North Atlantic ports as a result.

Now the question must be whether alliance members get a taste for co-operation. More service rationalisation could eliminate duplicated port calls. More than 170 ships are due to be delivered to alliance members this year, most of them no smaller than 7,500 TEU. New services and carrier combinations can be expected from both inside and outside the alliances to soak up this capacity. **PH**

“As competitors merge, duplicated sailing routes will be dropped to achieve economies of scale”

Global operators tighten their grip

As another consolidation is expected, if Dubai Ports World is successful in its \$5.7Bn takeover of P&O Ports, **Neil Davidson** looks at a report which details developments in the industry

It's hard to understate the influence of global terminal operating companies within the world container shipping scene – around 60% of global container throughput is now handled by terminal operators with a presence in more than one country.

Moreover, the biggest four global terminal operators – Hutchison Port Holdings (HPH), PSA Corporation, APM Terminals and P&O Ports – handled approximately 135M TEU between them in 2004. Data suggests global container traffic was around 358M TEU in 2004, so this means that almost 38% of the world's container traffic passed through a facility operated by a division of one of these four groups. There is little doubt that this figure will rise still higher, to more than 40%, over the next few years, fuelling concerns about levels of competition within the container terminal sector.

Leader of the pack

Hong Kong-based HPH is still the leader of this particular pack, handling around 47.8M TEU in 2004, 15% up on 2003, a performance which consolidated its dominance of the world container terminal market. The group has many key investment projects underway, not least in China, Pakistan, Egypt, the UK and the Netherlands, to underpin its market position.

The Singapore-based operator PSA also achieved a growth rate of around 15%, handling 33.1M TEU, in 2004. The state-owned company is concentrating much of its infrastructure investment in Singapore and Antwerp, although it has also spent an estimated US\$4Bn in 2005 buying into terminals in Hong Kong.

PSA's position as the second highest ranked global terminal operator is a tenuous one, in the short term at least. The report forecasts that APM Terminals will have overtaken PSA in terms of container throughput during the course of last year.

Expansion

The volume of containers handled by APM, the terminal operating subsidiary of the AP Møller-Maersk group, surged by around 49%, to 31.9M TEU, in 2004. The group has secured a string of new concessions during 2005 – including projects in Africa, India, the Middle East and South America – and this expansion will sustain the impressive momentum of this business.

Despite achieving a growth rate in throughput terms of around 37% in 2004, to 21.9M TEU, P&O Ports is losing ground to APM Terminals. The UK-

based company is also being chased hard by one of the fastest growing global terminal operating groups, Cosco, which was ranked fifth in the global terminal operators league table. The Chinese shipping and ports group's terminals handled 13.3M TEU in 2004, 80% up on the year before, although it must be said that this volume figure is based on minority shareholding in many terminals.

There is still a significant gap to be bridged between the two companies, given the number of large scale developments in Cosco's terminal portfolio, and the seemingly unstoppable growth in its home market. The report says that it will not be too long before the company assumes fourth place in the global terminal operator rankings.

Rapid rise

The report also highlights the rapid rise of two other global terminal operators – the newly rebranded DP World (the result of an amalgamation of Dubai Ports Authority and Dubai Ports International) and the Geneva-based shipping line, MSC. DP World made a US\$5Bn bid for P&O as P&H went to press, a move which, if successful, would catapult it into the big league of global players.

Drewry's analysis of confirmed investment plans shows that a significantly larger proportion of global container terminal capacity will be provided by carrier-based global terminal operators by 2010. MSC is forecast to increase its terminal capacity by an average of 15% annually between 2004 and 2010, while there will also be strong growth for Hanjin, CMA CGM and of course Cosco, in the container terminal sector.

Congestion

Global terminal operators – and the container industry in general – will face significant terminal congestion issues over the next few years, as utilisation levels rise. The forecasts show that world container throughput can be expected to increase by around 9% annually between 2004 and 2010. However, based on confirmed investment projects, capacity at container terminals world-wide will grow by only 5%, meaning that by 2010, average utilisation levels across the globe would have reached an untenable 98%. Unless further capacity expansion is confirmed – and quickly – then the industry faces terminal congestion virtually on a pandemic scale.

The global terminal operators must rise to the challenge, or the consequences not only for their businesses, but for the world container trade generally, could well be very serious indeed. **PH**

*Annual Review of Global Container Terminal Operators 2005, Drewry Shipping Consultants
Neil Davidson is research director, Drewry Ports,
Drewry Shipping Consultants, UK
More information at: www.drewry.co.uk*



Australia draws the cruise set

Evelyn Duffy hears how the industry is attracting more tourists 'down under'

Australia's leading industry marketing body wants ports to work in partnership with organisations servicing shore destinations as part of a plan to attract more cruise ship visits.

In an address to a Fremantle Ports hosted three-day conference on cruising, Cruise Down Under chairman Richard Doyle said ports had an important role to play in expanding cruise tourism.

If ports worked with organisations servicing shore destination there would be better provision of tourist facilities, he said, adding that Cruise Down Under and Australia's department of tourism and resources had commissioned a national economic impact study to show the wider community benefits of cruising.

Due for completion in September, the A\$60,000 study would examine impacts on employment, business development and profitability and it would assess the difference between metropolitan and regional ports calls, the type of ship visit (such as turnaround versus transit) and the impact of domestic and foreign cruise ships.

The aim is to establish the size of the cruise shipping industry in Australia and its impact and

build an economic model to report on the benefits from 2005 to 2007.

"There hasn't really been a comprehensive study done until now," Doyle said. "If we ask for support from ports and shore destinations, we really need to be able to show the benefits."

The gathering of representatives of the cruise market and of tourism authorities, government bodies and ports, was told the Australian cruise market, which had rapidly outstripped global growth, had grown by 35% over the past two years. The conference heard how the value for money offered by cruising and Australia's perceptibly hassle-free and clean, safe environment all inspired confidence in the industry's ability to generate more business.

Delegates were also told the industry would need to address some challenges to realise potentially booming opportunities. Shore destinations need to have the infrastructure to support cruise passenger demand. Security issues and any environmental impact need to be addressed and ports made aware of the need to cater for an increasingly discerning tourist.

Cruise calls up

Fremantle Ports chief executive Kerry Sanderson said she was delighted the nation's leading cruise marketing association had chosen Fremantle for the conference. Fremantle had 24 international cruise calls in 2004/05, she said, and now looked forward to welcoming new ships as well as enjoying continuing calls from popular

visitors such as the *QE2* and *Oriana*.

Fremantle ports, an active member of Cruise Down Under, was keen to do what it could to develop and promote cruise shipping opportunities. It had been able to provide leadership in this area – ensuring things ran smoothly for a cruise ship visit was essential for any port that was serious about being seen as an attractive destination for cruise ships, Sanderson added. This called for good forward planning and close liaison with the shipping agents and other service providers so the needs of the shipping line were met.

The state chapter of Cruise Down Under, Cruise WA, had made good progress in promoting the regional ports of Albany, Broome and Exmouth as cruise ship destinations, she continued. "We have taken a regional focus with the aim of successfully promoting not only Fremantle, but a number of other Western Australian ports as cruise ship destinations," she added. It was "encouraging" that the Portuguese classic cruise ship, *Funchal*, which made a series of cruises out of Fremantle in the last season, would return for 2005/2006.

The Portuguese cruise ship, *Funchal*, sails past the Fremantle Maritime Museum but she'll be back next season

New Destinations

Classic International Cruises Australia's Asia Pacific md Grant Hunter said home porting at Fremantle provided an opportunity to take in new destinations other than the traditional South Pacific places visited by Australian-based ships, including further away Mauritius, Bali and Lombok.

Fremantle, which served the more sparsely populated Western Australia, was also better suited to the 550 passenger capacity *Funchal*, which was ideal for calls to smaller Western Australian ports such as Broome and Exmouth: "Sydney has a lot of competition for other passengers with two cruise ships being based there year round."

Hunter said Fremantle Port was a user friendly base that worked in partnership with his company to facilitate co-operation between authorities such as the Australian Quarantine and Inspection Service (AQIS), the Department of Immigration and Australia's Customs Service.

"A cruise operator really depends on co-operation from ports for this sort of thing," he continued. "Ships are in port for a limited time and they need to be cleared by all the relevant authorities as quickly as possible. Every hour is expensive and ports need to understand this."

Quick turnaround

This proven ability to turn around large ships in a short space of time has augured well for the nation's busiest cruise port, said Sydney Ports senior trade development manager Phil Rosser.

Rosser, who is also deputy chairman of Cruise Down Under, said Sydney would host around 100 cruise visits for the 2005-2006 season – its stunning harbour had earned it a place in the 'must see destinations' for operators of around the world cruise ships such as the *QE 11*, the *Aurora* and the *Oriana*.

The port's capacity to turnaround a full vessel within 12 to 13 hours was very important to cruise operators,

“The Australian cruise market has rapidly outstripped global growth and grown by 35% over the past two years,”

he added. Ships like the 2,700 passenger capacity *Diamond Princess* were turned around in one day, letting one load of passengers disembark and then reloading with new passengers and luggage.

"It's not uncommon for Sydney to turnaround 5,500 passengers and 10,000 pieces of luggage in the one day," Rosser said. "We provide the infrastructure to ensure that we are logistically capable of that."

Rosser said a port's success in attracting cruise business also depended on its ability to work with shore destinations, to ensure enough tourist services were available.

"Ports can look after the infrastructure or hard side, but there is a need to ensure the soft side is catered for by working with local organisations and tourism operators," he said.

"You can't drop bus loads of people off at a destination that doesn't have enough services to cater for them."

Tourism links

Carnival Australia's vice-president of marketing and planning Mark Barnes said a key factor for deciding on where to homeport a ship was the proximity of the port to other destinations so that attractive itineraries could be offered to passengers.

Barnes said Carnival, which currently home ported the *Pacific Sun* in Sydney, the *Pacific Star* in Brisbane and the *Pacific Sky* in Melbourne, also looked for interesting ports which passengers would enjoy visiting and which offered good passenger terminal facilities.

"The ability to store our ship whilst in port is also important. Not surprisingly, reasonable port fees are also appealing."

Clean and safe

Summing up, cruise marketing expert Professor Ross Dowling said many travellers would be attracted to Australia because of its clean, safe environment.

He said Australia, which had set up a National Monitoring Centre (NMC) in Melbourne, had some of the most secure ports in the world.

To achieve this, Dowling explained that the NMC monitored a closed-circuit television system which provided 24-hour digital quality remote viewing of 88 ports around the country.

He saw great opportunities for Fremantle to develop as a home port for small to medium-sized cruise ships – of up to 30,000 tonnes – operating between Asian ports and eco-tourism destinations on the west coast. **PH**



Laying security myths to rest

Brinley Billings, regulatory compliance manager of global maritime security service provider, Securewest International, argues that security companies have a pivotal role in providing the backbone to ISPS

So, we are nearly one year into compulsory ISPS compliance and in many ways the code has thrown up as many questions as it has answered. Despite the shared feeling in some quarters that ISPS has proceeded better than expected, scratch below the surface and there are still many weak spots in the system.

There is no doubt that teething is to be expected in the early years of any major legislative changes, so perhaps the question we need to address here is what was expected of ISPS in the first place and what we collectively do to facilitate its smooth development?

What is a constant in this regulatory sea change is that ISPS is here and here for a reason. Terrorist attacks have increased and frailties in the system have been exposed on a number of occasions.

To dismiss ISPS is not an option, and equally

importantly, to cut corners ultimately is only cheating oneself and putting others at risk. Disruption from such attacks has the potential to cause havoc in the world trade sector.

ISPS is not a cure-all for the security ailments of the maritime sector, but it is a start and we are better with it than without. It is for the collective good of the whole industry and we should all be pulling in the same direction – not to do so would be pure folly.

Non-compliance

For the moment, ISPS is here and here to stay but there is a strong argument to say that things are not proceeding as they should. The questions to be answered revolve around how parties can work together to make it more effective, but a lack of interest by a minority puts the burden of increased security provision onto others.

One year on and there are still non-compliant ports. Underlying concerns were amplified further in recent weeks when US Coast Guard authorities blacklisted several countries (Liberia, Madagascar and Albania have since been removed from this list) for failure to meet the international maritime security standards.

It is obvious that port authorities have to do as much as they can to comply with the regulations, yet even when they do so, things may not go smoothly. In this case it will pay to get an independent view of arrangements.

Case study one

At one port we found that due to a misunderstanding of regulations, the facility had listed all employees under the heading of 'personnel with security responsibilities', even though they had no actual security responsibilities. This oversight could have required the port management to increase training levels to a higher level than had been attained, in order to be compliant with legislation, with all the attendant costs.

Case study two

Saving can be made for some ports if attention is paid to the secure facilities they are providing, and particularly the size of 'restricted' areas. Often these can be reduced in area, leading to the lowering of investment in fencing, lighting and other hardware. Many ports have faced extremely high hardware costs in the provision of these facilities because of the huge ground area many of these facilities cover. By taking these simple measures ports can sometimes reduce capital expenditure whilst still remaining fully compliant with international regulations.

Case study three

There are areas of the ISPS code that ports have not necessarily studied, but by calling in experts they will be able to meet their mandatory obligations with a reduced budgetary outlay. This particularly applies to small ports who could apply as a 'low consequence facility', thus cutting down on the amount of security procedure that has to be in place for approval.

Regular checks

It is up to security providers to continue to push the message that regular checks and refresher training are an important part of the overall process of compliance. Look deeper and you will discover that ISPS only requires contracting governments to comply with certain reporting criteria, but with little or no verification of how things are actually being acted out on the ground. Of all the governments consenting to the code, there will be some who inadvertently may be failing to maintain systems that actually work in times of genuine emergency.

It is precisely for this reason that the US Coast Guard (USCG) started the International Port Security Programme, which was put in place to verify ports that are compliant with the guidelines set forth by the contracting Government, with ISPS being the

“ Security is about limiting potentially devastating risk to profits and more importantly, life. ”

required minimum. Representatives from the USCG will be visiting countries that deal with the United States over the next few years to ensure compliance. Port assessments can be arranged where there are no port facility security officers or little knowledge of the workings of ISPS.

The old adage 'a chain is only as good as its weakest link' must hold true in this case. A security breach on a vessel through a non-compliant port that results in the Suez or Panama passages being blocked would wreak havoc on the world's economy.

Many vessel owners, such as US flagged carriers, are discovering that they are required to conduct an audit of their ship security plan within the first 12 months of issue, so is finance the issue here? The perceived wisdom is that an over-emphasis on security measures drives up business costs and that audits require more and more expenditure. In truth, we are now finding that companies (ports and vessels) may actually have over specified security in their original plan, and that we can reduce their costs or find a more effective method.

Indeed, recent evidence from Bureau Veritas suggests that there is some confusion amongst port operating companies over code interpretation leading to a few companies going too far with the level of control measure enforcement. Therefore, there is a clear need here for security providers such as ourselves to promote clarity through responsible and appropriate consultancy advice.

Training

Our job isn't all about the reactive element of security facilitation. As the training of all personnel is a requirement of the ISPS regulations and all employees need to be aware of basic security considerations, not only for their personal safety but that of others and the vessel or facility, it often makes sense to conduct training on site at the same time as an assessment, audit or annex is carried out.

Training should be interesting, thought-provoking and presented in an understandable manner that will ultimately give all concerned confidence in the security of the vessel or facility. Most importantly, it must never be a repetition of the regulations. Our courses are written in such a way that students learn how to interpret the regulations, how to use them in practice in the normal working day and be able to relate to their own vessel or facility.

ISPS is not the finished article, but to get to there we all have a responsibility to work together and ensure that security plans actually work should the day come when they are tested for real. **PH**

More info at www.securewest.com

Conducting an ISPS audit – assessment and training are always needed

EC green paper on maritime policy

The European Commission is pressing ahead to combine elements of maritime policy development, as its controversial battle to have a single voice at the International Maritime Organization continues.

EU president José Manuel Barroso threw his political weight behind a forthcoming green paper on a future EU maritime policy which aims to pull together a single protocol for the region for all maritime and ocean sectors.

His task for the New Year is to put some detail on the proposals, which have been opposed by industry groups, as he takes the battle to the next round.

"For too long our policies on maritime transport, on coastal regions, on offshore energy, on fisheries and on the marine environment have been developed in separate compartments," Barroso told the Mare Forum conference.

The International Chamber of Shipping (ICS) and the International Shipping Federation (ISF) are both against moves to give the EC one voice at IMO.

Shipowners' organisations say the move would be contrary to

the development of well-considered regulation, because the scope for independent action by national experts would be reduced. These national representatives are currently free to debate the details of new rules on the basis of technical merits, the organisations argue.

On the other hand, they fear EC involvement would increase the politicisation of debates at IMO, and damage the quality of IMO decision making.

So far, the European Commission has delayed asking EU transport ministers to make a decision about opening negotiations with IMO on EU membership. Both ICS and ISF say it is clear that this goal is being actively pursued.

European activity affects all ICS and ISF members, not least those in Asia, the groups say. Although the main focus of their work will always be IMO, ICS and ISF plan to become more active in relations with EU institutions on behalf of the global shipping industry. By improving the quality of dialogue between industry and European policy makers, they hope to see industry-wide benefits.

Marco Polo to explore new ideas

The European Commission called for more proposals for intermodal transport projects under the Marco Polo programme, which supports projects aiming to transfer freight from roads to other modes of transport, including short sea.

The deadline for the latest submissions is the end of this month. Some €30M has been allocated for the programme, out of a total budget for Marco Polo of €740M. The project will run to 2013.

Norfolkline has been successful in attracting funding for a new daily North Sea route linking Vlaardingen, in the Netherlands with Humber in the UK. Future candidates need to show projects will reduce freight carried by trucks.

The full text of the call, including the one-page application form, is available on the Marco Polo website at: http://europa.eu.int/comm/transport/marcopolo/whatsnew/index_en.htm



Efthimios Mitropoulos presents the prize to Luis Martínez

Long service to industry wins prize

The prestigious International Maritime Prize for 2004 has been presented to Luis Martínez of Mexico, who has spent a lifetime in high profile positions in the maritime sector. He was presented with his prize by Efthimios Mitropoulos, secretary-general of the International Maritime Organization, during a special ceremony at IMO's London

headquarters. The prize is awarded annually to those judged to have made the most significant contribution to the work and objectives of IMO. The IMO Council decided to award the prize to Martínez in recognition of his long service to the causes of maritime safety and protection of the marine environment

Land-based marine pollution 'should be taxed'

Land-based industries worldwide should contribute to the preservation of the marine environment through an internationally agreed special tax, the head of BSH, Germany's central agency for ocean shipping, has recommended.

Speaking in Rostock, BSH's president Peter Ehlers pointed out that existing liability regimes, such as the civil liability and IPOC fund conventions, do not take account of what he called "creeping marine pollution".

Harmful substances originating in factories and agriculture, discharged

legally into the oceans via rivers, now constitute by far the largest source of marine pollution, he claimed.

"We tend to forget that spectacular accidents at sea contribute only marginally to the overall environmental degradation," he said. A special tax for land-based emission sources could form the basis of a new international fund for surveillance and preservation programmes in the marine sector.

The charge would also provide an incentive for businesses to minimise their harmful discharges, Ehlers added.

Ship waste initiative

An industry pressure group has agreed to work on the technical and practical problems ports face in providing adequate waste reception facilities.

At its fifth meeting in London, the Industry Reception Facilities Forum set up a new working group, aimed at suggesting ways of ensuring the procedure is straightforward and streamlined. The group, which includes IAPH, was attended by Peter van der Kluit, outgoing managing director of the association's European regional office.

The Forum is pushing for the development of two forms to help the ports industry world wide – one for harmonised advance notification and another for receipt of waste. The forms should help smooth the exchange of information between ships and the shore.

The working group, made up of technical specialists from both shore and ship interests, has pledged to discuss the problems 'openly' and suggest proposals to overcome them.

Based on the progress already achieved in raising the profile of these problems, the Forum is confident that further progress can be made at this more specialised and detailed level.

A strong line of communication has been established between the Forum and the International Maritime Organization secretariat which is acting as observer at the meetings.

As a result, IMO is now in the process of establishing an action plan to tackle the inadequacy of port reception facilities, based largely on the action plan established by the Forum at an earlier meeting.

The group aims to increase the availability and adequacy of port waste reception facilities and to encourage their use, as part of the industry's goal to maintain cleaner seas through the reduction of marine pollution.

As well as IAPH, the Forum is made up of BIMCO; European Community Shipowners' Associations; European and International Harbourmasters' Associations; the European Sea Ports Organisation; the Association of Port Reception Facilities; the International Chamber of Shipping; the International Federation of Shipmasters' Associations; INTERCARGO; INTERTANKO and OCIMF.

Harmonisation closer on PSC

Years of industry lobbying for more consistent and harmonised port state control appear to have finally had some effect.

The port state control committee of the Tokyo MoU has taken a step nearer gaining inter-governmental organisation (IGO) status at the International Maritime Organization.

This would enable regional PSC regimes to contribute 'more directly' to IMO initiatives, the Tokyo MoU secretariat said. It would lead the way for greater harmonisation with other regional port state control regimes, notably the Paris MoU and the US Coast Guard.

Industry officials note that standards across the three major regimes have converged over recent years, but many still

demand better harmonisation of rules.

The Paris MoU decided last year to switch from a quota system to a specific list of criteria for targeting ships for inspection. The European Commission is understood to be following suit across all 25 member countries with the launch of its Erika III package later this month.

Industry officials have long tried to get the present 25% quota system scuttled, because they see it as an arbitrary policy that leads to unfair targeting and inconsistent port state statistics.

The 18-member Tokyo PSC regime could be represented as early as the next flag state implementation meeting of the IMO early this year, technical officer Ning Cheng said.

Officer shortfall

The world still faces a shortfall of ships' officers of about 2%, according to the fourth *BIMCO/ISF Manpower Update*, published late last year. The report is the result of over a year's work by BIMCO, ISF and the Institute of Employment Research at Warwick University in the UK.

The worldwide supply of officers is estimated at 466,000, against demand of 476,000. There is a surplus of ratings with 721,000 reporting for work and only

586,000 needed.

BIMCO and ISF conclude: 'While the shortfall of officers is smaller than forecast in 2000, certain sectors of the industry have experienced severe shortages.'

'The continuing growth of the world fleet, combined with work pressures on crews, indicate that demand for qualified seafarers will continue to increase over the next decade.' They call for more recruitment and training and a reduction in wastage.

Port accord

India and Belgium have signed a new agreement for continued co-operation in ports and related maritime industries to 2008. The accord followed a second meeting of the Indo-Flemish joint working group in Mumbai late last year.

Under the programme,

Belgium will provide advice and technical assistance for projects to the Inland Waterways Authority India and the port trusts of Visakhapatnam, New Mangalore, Mumbai, Cochin and Tuticorin. Other aspects of the accord cover promotion, training, exchange visits and scholarships.



Talking business – exchanging views in Riga

Partners share ideas

Members of the Port-Net initiative met to exchange ideas and experiences in marketing and public relations at a workshop held in Riga, Latvia.

Representatives from the Haven Gateway Partnership, made up of Felixstowe, Harwich, Ipswich and Mistley, and others from Klaipeda, Tallinn, Riga, Kaliningrad, Antwerp, Malta, Szczecin and Hamburg, say their discussions lead to new business opportunities.

'The port of Ipswich has very strong links with the Baltic ports which represent an important

element within the Port-Net group – particularly Tallinn, Klaipeda and Riga,' said Rob Smith, port manager for East Anglia for Associated British Ports.

'The Port-Net conference was useful for making comparisons on how the different ports undertake their marketing. I look forward to being involved in future Port-Net seminars,' he added.

Port-Net was set up by the European Union to promote inter-regional co-operation of ports. It is a network of 19 partners from 12 EU states and Russia.

Americas ports accord signed



Watched by officials, OAS-CIP executive secretary Carlos Gallegos (left) and John Paul Woodley Jr for PIANC sign the agreement

Two agencies have signed an agreement to promote ports throughout the U.S. and Latin America. The Inter-American Committee on Ports of the Organization of American States (OAS-CIP) and the International Navigation Association (formerly PIANC) signed up in Houston to promote trade relationships and opportunities between them.

The agreement provides the basis for co-operation between the two

organisations by acknowledging their common purposes and interests. As hosts of the OAS-CIP's executive board meeting, the Port of Houston Authority's chairman Jim Edmonds and executive director Tom Kornegay, the IAPH president, emphasised the need to build these relationships.

The new work plan for this year includes co-operative projects with IAPH and other port organisations around the region.

New IMO Assembly line-up

A new ruling body for the International Maritime Organization, the Council, has been elected by the Assembly, for 2006-2007.

The ten states elected to category (a) membership – those considered to have the largest interest in providing international shipping services – are: China, Greece, Italy, Japan, Norway, Panama, Republic of Korea, Russian Federation, UK and USA.

In category (b) – made up of ten other states with a large volume of international seaborne trade; Argentina, Bangladesh, Brazil, Canada, France, Germany, India, Netherlands, Spain, Sweden were elected.

Category (c), which is designed to ensure the representation of all major geographic areas of the world, has 20 States which do not qualify for election under the first two sections. It is now made up of Algeria, Australia, Bahamas, Belgium, Chile, Cyprus, Denmark, Egypt, Indonesia, Kenya, Malaysia, Malta, Mexico, the Philippines, Portugal, Saudi Arabia, Singapore, South Africa, Thailand, Turkey.

The council is IMO's executive body and is responsible, under the assembly, for supervising the work of the agency.

Mexico pledges help

Mexico and the International Maritime Organization are to work closer together to promote technical assistance activities for Latin American countries following the signing of an

agreement in London.

Mexico's director-general of Merchant Marine, Tomas Lozano y Pardinas, signed the agreement with IMO to further cooperation in the maritime field.

Award for PierPASS

Efforts by PierPASS to relieve congestion around the ports of Long Beach and Los Angeles were recognised in the USA by the Harbor Association of Industry and Commerce (HAIC).

In its 'Salute to Industry' awards banquet, Bruce Wargo, president and ceo of PierPASS, was presented with the award.

"PierPASS has been an astounding success, with off-peak use of terminal gates increasing from 15% to over 35% since the start of operations on July 23, 2005," said Gill Hicks, immediate past president, HAIC, and 'Salute to Industry' chairman

"We at PierPASS are proud to have contributed to reducing the local congestion experienced by the community and are looking forward to doing more of the same in 2006 and beyond," said Wargo.

"Keeping the ports of Los Angeles and Long Beach moving is critical to the USA and we want to be a part of that effort."

Singapore set to grant liner immunity

SINGAPORE'S Competition Commission plans to recommend exemption for international cargo liner agreements from the competition rules. The decision is a major victory for container shipping lines and especially the Singapore

Shipping Association (SSA), which lobbied hard for the exemption.

The amendments to the Competition Act 2004 are due to be finalised by July, but will be retrospectively imposed from this month.

Intertanko's new standard

Governments still considering whether to participate in the International Maritime Organization's voluntary flag-state audit scheme have received a stark warning from the industry: take part or risk losing all quality tanker tonnage.

Tanker owners' association Intertanko has announced that it plans to issue strict flag state requirements as part of its membership criteria. The move, announced after the association's council meeting, ensures that all Intertanko members will have to use flags approved by the IMO's voluntary audit scheme.

Although the criteria is unlikely to come into effect until the scheme is established – at least later this year or next – the announcement is expected to provide an added impetus for governments to speed implementation.

Equasis celebrates

Equasis, the online ship safety information organisation, marked its fifth anniversary by announcing a new member.

Michel Aymeric, France's director of maritime affairs, announced that Australia had joined the Equasis supervisory committee, and that the Indian Ocean MoU on Port State Control would become a data provider.

Equasis was born in the aftermath of the *Erika* disaster. The

EU, France, Spain, the UK, Singapore, Japan and the US Coast Guard supported the project.

"It is true that each maritime disaster tarnishes the image of the industry," Aymeric said. "Equasis is one of the public sector responses in favour of quality shipping."

Its database, is consulted 500,000 times a month by 15,000 users in 166 countries, providing the main source of maritime safety information for many.



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Working for a stronger IAPH

In his New Year message, Tom Kornegay, IAPH president and executive director, port of Houston Authority, outlines his vision of the future



Ports are evolving as providers of complete logistic networks. This trend is driving a momentum that is creating port evolution, leading to the development of a sharply delineated hierarchy on a global scale. Ports are being increasingly differentiated by their ability to handle the latest generation of container ships.

Containers now account for 60% of the world's trade by value and are expected to reach 70% by 2010. Ports have changed and adapted to smooth the way for this cargo.

The IAPH can, and will, have

a positive and direct role in strengthening the global port marketplace. A strong international port association can effect tremendous constructive influence on the maritime industry. As the American revolutionary war hero Thomas Paine said: "United we stand, divided we fall."

Strengthening the IAPH will require greater involvement by all of us. This organisation is only as good as what we all put into it. The staff cannot do the job for us. If we are serious about our mission, then each of us must devote more of our time and expertise to IAPH. We must

broaden the membership and improve IAPH.

Broadening the membership will be much easier if we offer more to members. I want to reach beyond the port community to strengthen and develop alliances with NGOs and other associations that are mutually beneficial to make IAPH more useful to all of us. Not only in 2006, but in the future, the port industry will be stronger with a greater IAPH.

The future of successful ports dictates that we must protect and grow our ports to ensure the free flow of commerce that is so crucial to our economic progress. The IAPH is just the organisation to bring that vision to life.

HAPPY NEW YEAR!

Out of Africa

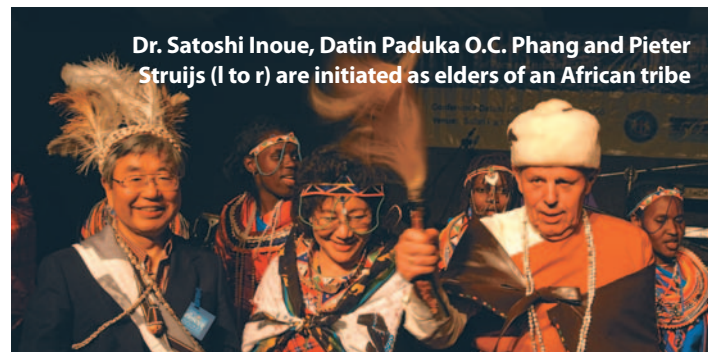
Over 300 people descended on Nairobi when IAPH combined its Africa/Europe regional meeting with the 5th Pan African Association for Port Co-operation (PAPC) for a historic conference at the end of the 50th anniversary celebrations.

The meeting, which had the theme of 'Port modernisation: adapting to socio-economic and economic challenges', was opened by the Hon. Moody Awori,

vice-president in president Mwai Kibaki's new cabinet.

"Your presence here symbolises a lot to us because we want to share your knowledge and experiences in the management of ports," Mr Awori told delegates drawn from 30 countries along with 150 representatives from the local maritime community. He outlined the difficulties faced by transport in Kenya, including poor quality roads inland, poor railway networks and weak intermodal transport systems.

Delays in cargo clearance,



inadequate specialised cargo handling equipment and high

transport costs adversely affected Kenyan businesses, he said.

Training plans unveiled

More money and resources are to be provided for the association's training scheme

under a major initiative announced at the conference by Datin Paduka O.C. Phang, 1st

vice-president of IAPH.

There will be a review of the association's financial assistance for training young professionals in developing ports. Young staff employed by IAPH members in Africa will visit their European counterparts for a week's training. The project has brought together both parts of the Europe Africa region – it was suggested by IAPH immediate past president Peter Struijs and will be co-ordinated from Kenya by Gichiri Ndua, 2nd vice-president.

Phang said the new scheme will bring great benefits to members.



Last 50th party

On a breakaway day, participants at the IAPH/PAPC conference celebrated IAPH's 50th anniversary year for the last time with a round of special visits.

The first was to the Rift Valley and Lake Nakuru National Park, one of Kenya's beauty spots. A gala dinner was held at Kingfisher Point in the Nairobi National Park, where a large tent was set up to accommodate conference delegates, guests and Kenya Ports Authority staff for the celebrations. Finally, to end the conference, a visit was made to the port of Mombasa.



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**Knatz:
faces green
challenges**



Knatz takes vision for the future to LA

One of the more association's more outspoken members plans a move across the bay

New IAPH EXCO member Geraldine Knatz, well known for her efforts in environmental issues, is to move from Long

Beach port to rival Los Angeles as the first woman executive director.

She is expected to officially move over to the Los Angeles

side of San Pedro Bay in the next few weeks after approval by the city council and harbour commission. Her nomination was announced by LA mayor Antonio Villaraigosa, who praised her vision for the future.

Knatz, who started her career at the port of Los Angeles before going to Long Beach in 1981, said she is happy to be going back. She pledged to introduce more initiatives to control pollution at the two ports and to work with her associates in Long Beach to usher in a new era of co-operation between the two ports.

In her six years as managing director of development at Long Beach, Knatz was instrumental in that port's US\$2.5Bn capital development plan that included an aggressive 'green port policy.'

In his nomination, Villaraigosa said that Knatz understands his vision that making the port 'greener' will be right both for the community and for business.

Even though Los Angeles passed Long Beach several years ago as the nation's top container port, management says growth has been held back recently by local environmental activists and former mayor James Hahn's 'no net increase' policy on diesel emissions – twin challenges for Knatz.

Snapshot of ISPS

The United Nations Conference on Trade and Development (UNCTAD) has asked IAPH members to help in a survey it is compiling on current security arrangements in the maritime industry.

UNCTAD said that the introduction of the ISPS Code was 'one of the most important recent developments in the field of maritime security.'

All members are being urged to help the UNCTAD secretariat in what is hoped will be a comprehensive snapshot of ISPS at work.

The agency says that the introduction of ISPS created a wide range of obligations for governments, port facilities and shipowning and ship-operating companies engaged in international shipping.

The survey will show how ISPS has been implemented and what investments ports have had to make to comply with the regulations. UNCTAD plans to pass information it gains on compliance to developing countries.

Questions include details of the status of ISPS Code measures and what they cost to introduce.

"It is hoped that the results of the study will contribute to furthering the debate on the economic impact of security-related measures," said Supachai Panitchpakdi, secretary-general of UNCTAD.

The questionnaire should be returned to the UNCTAD secretariat. The contact point is: Peter Faust, head, trade and logistics branch, division for services infrastructure for development and trade efficiency, Palais des Nations, CH-1211 Geneva 10, Switzerland.

Fax: + 41 (0) 22 917 0050.

Contact: Ms Hassiba Benamara at hassiba.benamara@unctad.org; tel: + 41 (0) 22 917 2038; fax: + 41 (0) 22 917 0050.

Joining up

There has been a good response to the appeal late last year for members to come forward to join the reformed technical committees, according to deputy secretary-general Tatsuki Hioka.

The IAPH committee activity is central to the development of the association. The experts and specialists who make up the committees play an essential role in identifying current and future issues faced by the world port industry and offering solutions to new challenges.

There are eight technical committees grouped under three overall subject areas of Communications and Training, Port

Safety, Security and Environment and Port Development, Operations and Facilitation.

About 100 people have volunteered and some are serving on more than one committee. There is still room for more, though, amongst the familiar and new faces on the committees, Hioka says. If you want to make a difference, now is your chance to come forward.

There is a well-balanced regional spread between the three IAPH areas, although he adds that more members from the Americas would be welcome.

It is hoped that the new committee members will

be enthusiastic participants who can bring fresh ideas to IAPH as it sets up the agenda for the 21st century.

They will help the association keep pace with developments in the maritime and transportation industry as a whole.

Regular and associate members are eligible, so if you are an employee of a member and would like to take part, contact the IAPH secretariat on info@iaphworldports.org

For more information look at the website www.iaphworldports.org where you can learn about the workings of the different committees.

Ports to the fore in IMO debates

The association's representatives were busy on a number of issues as the year closed



Progress on cobalt-60 shipments

The IAPH has welcomed a decision by the International Maritime Organization to allow ports to regulate the movements of radioactive materials – cobalt-60 – used in the medical world.

These shipments will also be allowed to pass through 'nuclear free zones'

because of their medical application.

IMO's Facilitation Committee (FAL) will develop an ad hoc mechanism to monitor shipments. IAPH members are being urged take part in any monitoring group. FAL will report on monitoring proposals at the next IMO Assembly in 2007.

Spoilt cargo studied by new group

A new group has been set up to report to the International Maritime Organization in October this year on conflicting issues between MARPOL 73/78 and the London Convention (LC). The IAPH is to take part.

"The need for this joint group became necessary as the LC began to address

spoilt cargo management and the exemptions for 'normal' operations of vessels under the convention," explains Geraldine Knatz, chair of the IAPH Port Environment Committee.

"The current debate centres on the conflicting views of whether discharge of spoilt cargoes is an operational matter

and allowed under MARPOL Annex V, or a deliberate 'dumping' regulated under the LC, requiring a permit," she explained.

The group will produce an overview of both conventions looking at the so-called 'boundary issues,' particularly for spoilt cargoes. This should lead to suggestions for more reliable reports on spoilt cargoes.

Recommendations will be ready for the October meeting of the Marine Environment Protection Committee (to discuss MARPOL) and the November meeting of the LC.

Valuable guide

IAPH member ports that are just beginning to undertake analysis of dredged material will find help in new guidelines published by IMO.

The Guidelines for the Sampling and Analysis of Dredged Material Intended for Disposal at Sea is now available as IMO Publication No. 1537 E in English only.

It provides practical advice for IAPH ports that currently undertake sampling and analysis of dredged material as well as ports that have not yet undertaken such analysis.

The report is available for purchase from IMO Headquarters in London or online at https://www2.imo.org/b2c_imo/b2c/init.

Publication in other languages will depend on sales of the English version and demand by potential users.

The Guidelines are also available on the IMO website as a read-only file which cannot be downloaded or printed.

China meetings scheduled

IAPH ports should attend an important series of meetings in China, says IAPH's chair of the Port Environment Committee, Geraldine Knatz.

She and vice-chair, Captain David Padman, are helping to set up a workshop dealing with environmental management of ports which will run in conjunction with the London Convention (LC) scientific group meeting in Dalian.

The workshop will be held from May 29 to June 2, followed by the London Convention meeting from June 5 to June 9.

Reef regulations

The United Nations Environmental Programme (UNEP) has appealed for guidance on artificial reef construction, unregulated in many areas of the world.

There is disagreement on whether this falls under the scope of the London Convention (LC), which deals with disposal activities and not 'placement'. Despite the inconsistency with the treaty, last year's LC meeting unanimously supported the request of UNEP.

Initially, the LC's scientific group will examine current practice and

decide on additional guidance for developing countries.

IAPH argues that many port construction activities are 'placement' and so outside the scope of the LC.

Artificial reefs are often dual purpose – for disposal of material and to enhance habitats. At this time, the proposed LC guidance on placement is focused only on artificial reefs. IAPH will continue to monitor this issue as any guidance, even if developed with developing countries in mind, will affect ports.

Call for technical assistance

South Africa has asked the London Convention to provide a specialised training workshop to help it regulate the disposal of dredged materials.

The country's ports produce an average of about 2.5M m3 of dredged material annually from maintenance operations. Legislation to require ports to carry out monitoring is not in place, so South Africa is asking for a training workshop early in the year.

Dates for your diary

Major maritime congresses throughout the world

February

- 2 – 3:** The 4th Intermodal Africa – Namibia
www.transporevents.com
- 14 – 15:** IAPH Asia/Oceania Regional Meeting – Karachi, Pakistan
Website – to be announced
- 14 – 17:** The 1st Panama Annual Dredging Conference & Exhibition – Panama
email: weda@comcast.net
- 22 – 23:** GreenPort 2006 Antwerp, Belgium
www.green-port.net
- 28 – 2:** China Maritime – Hong Kong
www.baird.com.au

March

- 1 – 3:** IAPH Africa/Europe regional meeting, Riga, Latvia.
Website – to be announced
- 6 – 10:** World Maritime Technology Conference – London, UK
www.wmtc2006.com
- 14 – 15:** CSR in Maritime Shipping Conference – London, UK
www.proactivelogistics.com
- 14 – 16:** TOC Asia Conference & Exhibition – Busan, South Korea
www.toc-events.com
- 22 – 24:** Asia Pacific Maritime – Singapore
www.apmaritime.com
- 29 – 30:** Ports Policy Conference – London, UK
www.thewaterfront.co.uk

April

- 9 – 12:** IAPH Mid-term Board Meeting – Mumbai, India
Website to be announced



Phang in India

IAPH 1st vice-president Datin Paduka O.C. Phang spoke at the opening ceremony of the Indian Maritime conference INMEX 2005 in Mumbai, India.

She addressed a range of high-ranking officials, including Shri T.R. Baalu, India's minister of shipping, Dato' Douglas Uggah Embas, deputy minister of transport, Malaysia, and Ravi Budiraja, chairman of the India Ports Association

She praised the efforts of Indian port members of IAPH and those from the Netherlands for work in putting the conference together.

Special mention was made of IAPH members from Malaysia who had worked with the Indian ports members to tackle issues of common interest and who had participated in working out a framework for maritime and port-related issues.

Phang added: "IAPH has been a

long-standing supporter of this series of international port training conferences.

"The conference held in Portugal last May discussed major issues such as cross-cultural concerns in training, cost-benefit analysis of training, simulation technology, standards, working conditions and experiences of the ISPS code. All information is on our IAPH website."

She thanked the Indian Ports Association, its IAPH members and the Indian government for agreeing to host the next mid-term board meeting, which will be in Mumbai in April.

Through these types of meetings, IAPH gets ideas from members and industry and then can take initiatives to review its operations.

"Many of these changes have been and are still being implemented," Phang concluded.

Annual Report

The IAPH has produced its first annual report in the association's 50-year history.

Until now, a report on the IAPH's activities was given to members by the secretary general at the board meetings at both the bi-annual World Port Conference and mid-term Board Meetings.

This is the first time that a report will be available to non-members and the general public.



Membership Notes

The IAPH welcomes the following new member:

Regular Member

Kandla Port Trust

Address: Administrative Office Building,
P.O. Box No.50, Gandhidham (Kutch),
Gujarat State, PIN 370201 INDIA

Telephone: + 91 (0) 2836 233 001

Fax: + 91 (0) 2836 235 982

E-mail: ajanarao@hotmail.com

Website: http://www.kandlaport.gov.in

Representative: A. Janardhana Rao, chairman

Conference proceedings

IAPH members will, by now, have received proceedings of the 24th World Ports Conference held in Shanghai. It was very well

attended and both IAPH members and non-members can buy extra copies at ¥5,000 plus postage.

PORTS HARBORS

Official Journal of the International Association of Ports and Harbors

SURVEY

IAPH is conducting a reader survey, seeking your views on the new-look *Ports & Harbors*.

All answers will be kept confidential. We would appreciate your feedback by February 1, 2006. If you have any questions about the survey, please contact ph@iaphworldports.org.

Photocopy and fax your completed survey to +81 3 5403 7651.

If colleagues read your *Ports & Harbors*, please ask them to complete a copy of the survey. IAPH would like to thank members of the Communications and Community Relations Committee for their help.

Please tick relevant boxes

1. How many people read your copy of *P&H*?

- 1.1 One ☐
1.2 Two ☐
1.3 Three ☐
1.4 Four or more ☐

2. How long does it take to read *P&H*?

- 2.1 Less than 10 min. ☐
2.2 10 - 30 min. ☐
2.3 30 - 60 min ☐
2.4 More than 60 min. ☐

3. What section do you read first in *P&H*?

- 3.1 Comment ☐
3.2 News ☐
3.3 Open Forum ☐
3.4 Cover story ☐
3.5 Features ☐
3.6 Maritime Update ☐
3.7 IAPH Info ☐
3.8 Bulletin ☐
3.9 Last Word ☐
3.10 Other ☐

4. Please rate *P&H*. 1= poor, 10= highest rating:

- | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 4.1 Accuracy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.2 Clarity | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.3 Relevance | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.4 Informativeness | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.5 Usefulness | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.6 Balance | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4.7 Design | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

5. What topics do you like to read?

- 5.1 Safety & Security ☐
5.2 Environmental Management ☐
5.3 Dredging ☐
5.4 Port Development ☐
5.5 Cargo Handling & Terminal Operations ☐
5.6 Logistics & Supply Chain ☐
5.7 Port Community IT Systems ☐
5.8 Personnel Training ☐
5.9 Shipping ☐
5.10 Port-related issues at the UN ☐
5.11 Other ☐

6. Please name three commercial maritime magazines, ranked 1st to 3rd

1st _____

2nd _____

3rd _____

7. Any other comment on *P&H*?

8. If you agree, please tell us about yourself.

Organisation: _____

Title: _____

Name (optional): _____

**Thank you for taking
the time to answer
this survey!**





Reflections on a successful 50th anniversary year

Dominic J. Taddeo, president and CEO of the Montreal Port Authority and the chair of IAPH's 50th anniversary project committee, looks back at a successful series of celebrations

First of all, I would like to congratulate the IAPH on its anniversary year in 2005, and to wish many more to an organisation that is so crucial in bringing world ports together.

As chair of the IAPH 50th anniversary project committee, I can say that the celebration year was indeed a success. Throughout 2005, a series of special events were held to commemorate the golden jubilee celebrations, starting with our 50th anniversary Tokyo Forum on January 14, drawing some 400 international participants. And no wonder: the experts on the panel were exceptional and certainly helped to fulfil the IAPH's purpose of exchanging functional information among colleagues.

Celebrations then moved on to Tehran in February for the Asia/Oceanic region meeting and London in March where the regional meeting of the Europe/Africa group was held.

Of course, a highlight of this special year was May's week-long 24th IAPH World Ports Conference in Shanghai. Some 1,000 people attended the memorable opening of this biennial world ports summit. With so much of world trade focussed on Asia, the breathtaking port city of Shanghai was an especially fitting venue.

From there, we moved to Los Angeles in October for an anniversary homecoming. IAPH returned to the city where it was founded for a special gathering before the final curtain in Nairobi in December. The events drew members, colleagues and friends together for IAPH's milestone achievement and helped renew our commitment to the future.

If I had to recommend a path for the IAPH to take over the next 50 years, it would be to continue its pursuit of world peace through world ports. Although it may seem self-congratulatory, I can honestly say we are on the right track.

“ If I had to recommend a path for the IAPH to take over the next 50 years, it would be to continue its pursuit of world peace through world ports ”

Dominic J. Taddeo

Experience the progress



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Asia works

Kalmar's new state-of-the-art Chinese assembly plant opens in Shanghai to enhance the offering to customers throughout the Asia container-handling equipment market.

Green wave

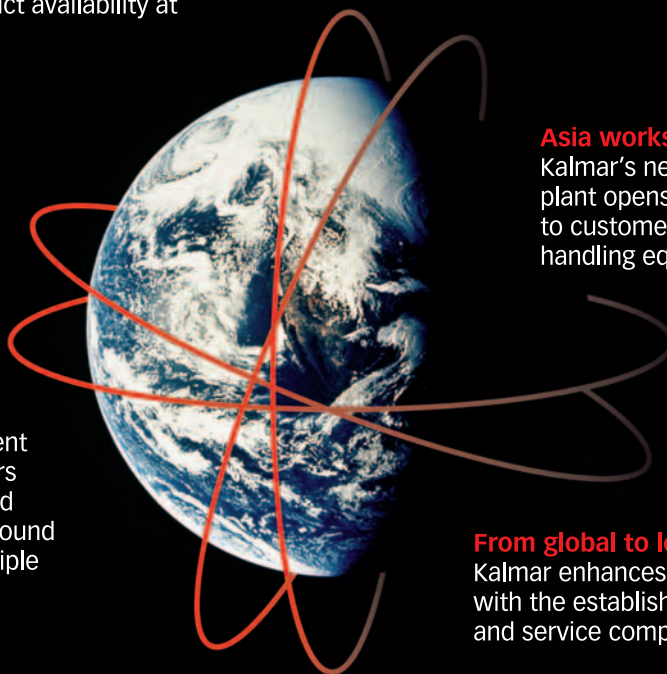
Kalmar's new pro-environment all-electric E-One RTG delivers outstanding performance and productivity to customers around the planet, helping Kalmar triple its RTG unit orders in 2005.

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Kalmar enhances customer service in India with the establishment of its own sales and service company.

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