

No. 8 | SEPTEMBER - DECEMBER 2009

CARIBBEAN MARITIME

FOCUS ON CRUISE & MEGA YACHTS

CRUISE GUYANA

A UNIQUE VISITOR DESTINATION

CRUISE INDUSTRY

PROACTIVE STRATEGY

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MEGA YACHTS

WELCOME BOOST TO ISLAND ECONOMIES

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*Stone engraved of an Amerindian man painted hands from South Africa's caves emerging the genesis of a new Caribbean era.
The artist: Henri Petit Jean Roget*



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CARIBBEAN MARITIME

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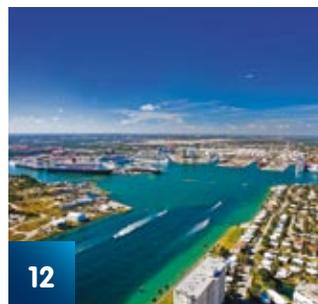
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- THE EDITOR



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MISSION STATEMENT

"To promote and foster the highest quality service to the maritime industry through training development; working with all agencies, groups and other associations for the benefit and development of its members and the peoples of the Caribbean region."

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In support of a regional dialogue for solutions

The economic recession affecting most countries of the world is not going away as quickly as some would have hoped. However, the third quarter of 2009 ended with some positive signs in some of the major industrial economies.

Not so the countries of the Caribbean and Latin America. These countries are being battered. The decline – in tourism, commodity exports and private money remittances – has hurt and governments do not have the medicine to cure their ailing economies. As a result, as the Economist Intelligence Unit (EIU) noted "...most of these economies are now firmly in recession ..." and are likely to remain so even after notable recovery in the USA and the UK.

In tourism, the region's main source of employment and foreign exchange, the Caribbean Tourism Organisation (CTO), reported a significant decline this year, compared with the corresponding period in 2008, of an average of about 10 per cent. The average distorts reality. Tourist arrivals were down by more than 25 per cent in the British Virgin Islands; 21 per cent in Anguilla; 16 per cent in St Maarten; and 15 per cent in The Bahamas. It should be noted that Jamaica (down 0.2 per cent) and Guyana (down 1.9 per cent) did not fare as badly.

According to the EIU, besides deterioration in macro-economic results, governments are beginning to show financial strain. Jamaica has had to seek assistance from the IMF "... as it has little ability to borrow further from private sources".

Any effective solution to this crisis must come from within and it is not likely to be a single idea from one source. In the Caribbean there are various organisations and groupings, like the Caribbean Shipping Association, which can and should be studying the economic realities facing their constituents and the region as a whole. The time calls for a finding of solutions and this process must begin with study and dialogue within and across groups and boundaries.

The Caribbean has the institutions and forums which can harness the thinking and wisdom of its people in the quest for solutions. The Association of Caribbean States and Caricom are two such. It must have been frightening, therefore, to hear the illustrious Sir Shridath Ramphal say – in Kingston, Jamaica, on Wednesday 29 July 29 – that he had observed something different at the Caricom summit in Georgetown the previous month from past reunions. He is reported as saying: "There was a mood, I sensed, among many of the heads [of state] that not just progress with the integration agenda, but Caricom itself, was under threat."

Caricom under threat? Now weakened, the countries of the region need strength from unity and broad-based, co-ordinated action across interests and disciplines, sectors and sub-sectors, to increase trade and stimulate production. Caricom has the capacity to assist this process. An approach and attitude to development that is based on regional co-operation and dialogue is important for the region both now, during the search for solutions to the economic crisis, and afterwards, so as to sustain production, growth and development.

It is against this background and with an understanding of regional development, gleaned over almost 40 years, that the CSA has continued its work of training and, through inter-organisational co-operation, development of the region's human resources. This it has been doing through collaboration and co-operation with organisations and groupings whose collective wisdom and intellectual resources can help to chart a course out of the current economic doldrums. We refer to organisations such as Caricom, the Association of Caribbean States and the Inter American Committee on Ports (CIP) of the Organisation of American States (OAS),

Caribbean Maritime is one tool that the CSA has employed to stimulate a regional dialogue for solutions. It is hoped that the focus in this eighth edition on the regional economic benefits to be derived from accommodating cruise ships and luxury yachts will help support such a dialogue.



MIKE JARRETT, EDITOR

The initial doubts have been cleared

The Caribbean Shipping Association has always had its own magazine. The first publication, *Caribbean Shipping Journal*, was replaced with the current magazine, *Caribbean Maritime*, in May 2007. This is the eighth edition of what has become a very successful business magazine. Our readership continues to expand with every publication and it is now available in electronic format at the CSA website (www.caribeanshipping.org).

It is fair to say *Caribbean Maritime* not only speaks for the CSA; it also provides

It was an honour that the first edition of this magazine was produced during my presidency. The initial doubts about its success have been cleared and I have enjoyed with satisfaction watching it grow and develop

a forum for discussion and for the exposure of ideas that are relevant to shipping. Shipping is perhaps the single most important element in

international trade. In the Caribbean and Latin America, it is the lifeblood of our national economies.

Historical

Caribbean Maritime therefore has a historical and developmental role to play and the initial feedback to its presence in the world of business has been very positive.

It was an honour that the first edition of this magazine was produced during my presidency. The initial doubts about its success have been cleared and I have enjoyed with satisfaction watching it grow and develop.

Personally, as someone in the shipping business for more years than I care to remember, this magazine is good. Its content is good



and its coverage is wide – it covers the shipping industry across a fairly large geographical area.

Statement

In demitting the office of CSA President this year, I leave behind a publication that is far better than the one it replaced; a publication that makes a statement about the seriousness of the CSA in helping the development of the shipping industry across the region. In that regard, I take this opportunity to thank all the advertisers and writers for the first seven editions. A special thanks to Land & Marine Publica-

tions for its excellent graphics and production; but, perhaps more important, to the Editor, Mike Jarrett, for proposing the idea for its publication in the first place. He gave it its name and has done an outstanding job of launching it.

The CSA is proud to have such an excellent publication as *Caribbean Maritime*. Long may it contribute to the exchange of ideas so necessary in building an effective and efficient region-wide shipping industry.

Fernando L. Rivera
President, Caribbean Shipping Association



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Luxury yachts offer 'huge scope' for well paid support services

By Mike Jarrett

THE IDEA of opportunities for cash-starved Caribbean territories to make money from the luxury yacht sector was not lost on delegates at the eighth Caribbean Shipping Executives' Conference* in Cartagena, Colombia.

Rupert Connor, president of Luxury Yacht Group, underlined the 'tremendous' scope for generating income in a presentation entitled 'The Luxury Yacht Sector: Business Opportunities for the Region'. He presented a list of services and income-generating activities from which countries in the region could benefit if more was done to create facilities for the growing fleet of luxury yachts sailing the Caribbean and Gulf of Mexico.

When yachts are docked in a marina, their needs are daily and funds are constantly being transferred to shore

In taking conference delegates through the many ways to maximise financial benefits from the luxury yacht sector, Mr Connor said more than 300 new luxury yachts were expected to be launched in 2009.

Operators

Revenues are possible from any number of services and goods required by yacht operators. What is certain is that if a country has no dockage facilities to accommodate luxury yachts, then there will be no income from servicing them.

According to Mr Connor, annual costs for keeping a yacht in good shape run from US\$500,000 for smaller yachts of about 80 ft (24 metres) to US\$3.5 million for yachts over 200 ft. Of course,

these costs will vary depending on the particular craft and the taste and pleasures of owners and operators. About 29 per cent of this money is spent on crew and 26 per cent on fuel. Guest costs account for a significant 17 per cent of annual expenditure. Mechanical and engineering needs account for 10 per cent of annual costs and other maintenance for seven per cent. Communications account for three per cent.

Do the maths

Dockage accounts for eight per cent of costs. Readers can do the maths. There is a lot of money to be earned. For marinas that are well equipped, well tended and therefore well used, yachts can produce a healthy profit. Where there is no dockage for yachts, the opportunities for transfer-

ring funds ashore are severely limited.

When yachts are docked in a marina, their needs are daily and funds are constantly being transferred to shore. Guests on board need items ranging from spas and concierge services to high-end restaurants and local tours. In this time of heightened environmental awareness, people who sail yachts tend to be protective of the environment. They are likely to participate in eco tours and other events that appeal to the environmentally conscious. Often, because docking at a particular destination over time will establish a relationship, guests will actually donate to large environment projects or otherwise become patrons of eco initiatives.

Crews of super yachts are fairly well paid and they, too, need goods and

services ashore. From money remittance services to sending salaries home to shopping for personal goods and gifts, yacht crews spend money ashore.

Both guests and crew will need local transport and will patronise local restaurants, pubs and special events.

Even the boat

Even the boat needs goods and services. More than a quarter of the cost of operating a yacht goes on fuel. This is good business for local bunker suppliers. And, for destinations that invest in yacht maintenance infrastructure and have skilled and specialist personnel, there is much to be earned from the significant amount this sector spends on mechanical engineering.

The fact that regulations and taxes are the price we pay for living means that local authorities have potential revenues to collect from a variety of legal stipulations so that yachts are 'in compliance'.

The fact is that a well designed, equipped and secure marina which understands and effectively caters for super yachts can be as profitable as a cargo port. With over 300 new luxury yachts expected to be launched this year, the business is there to be had.

There is a caveat, however. People who sail super yachts know good quality and value when they see it. They will pay a fair price for quality but will despise and reject mediocrity and price gouging. And, since yachts can easily be moved and moored in a different territory, the only way to secure an investment in a marina or attendant services is to deliver high quality at a fair price. 

**The conference is held annually in May by the Caribbean Shipping Association. There were about 200 delegates at this year's event.*

MEGA YACHTS – WELCOME BOOST FOR ISLAND ECONOMIES

From marina development to gourmet foods, big yachts mean big bucks for down island businesses, says Bill Klimas

By Bill Klimas

The explosive growth in the mega yacht industry throughout the 1990s and the early part of this decade has had a dramatic effect on economic growth throughout the Caribbean.

With more than 5,000 yachts over 80 ft (24 metres) in length, worldwide, and a further 1,000 on order or in

the process of being built, the economic impact can be staggering for the communities they frequent. Each year, the vast majority of the Atlantic-based fleet spends the winter in the Caribbean basin.

IMPACT

These floating mansions vary greatly in size and value, but their ability to bring in 'big bucks' is well known in South Florida. The Marine

Industry Association of South Florida has documented this in a study by the Virginia Institute of Marine Science at William and Mary University entitled 'Economic Impact of the Recreational Marine Industry – Dade, Broward and Palm Beach Counties, Florida 2005'. According to this study, the impact of an average mega yacht visit is upwards of US\$400,000. The impact on South Florida is greater than on the smaller island communities further

south because of the extensive network of provisioning, service and brokerage businesses located there.

These bastions of expendable cash have monthly budgets that often exceed those of the communities they visit. Expenditure on salaries for crew often transfers directly to a boost for the local economy, as do shoreside excursions and spending by owners and guests. Dockage is a substantial revenue source. With an average slip rate of two dollars per foot per day, a yacht in the 156 ft (47 metre) range pays nearly \$10,000 a month just to sit still.

Most of the supplies and materials needed to maintain and manage these vessels are shipped in from businesses in



The 75 ft Viking motor yacht 'Viaggio' in front of the Atlantis resort in Nassau

South Florida. Marc Burton, of Claire's Marine Outfitters, in Fort Lauderdale, said: "We deal primarily in parts – mechanical, maintenance, deck hardware, cleaning supplies – and an average charter operation will order upwards of \$20,000 in materials in a given season. We use both seaborne and air freight services, with the primary being Tropical Shipping in Miami and Amerijet out of Fort Lauderdale. The destination of choice is St Maarten because of its duty-free status and location."

POSITIVE

His positive view is shared by Dean Dutoit, of National Marine Suppliers, a premier provisioning company known for its weekly air charter delivery of top-shelf produce

seasonal outlay can range from \$20,000 to \$30,000 to well over \$100,000 a season," he said.

The mega yacht industry and its high-rolling guests have led to a boom in economic investment in the region. With an annual growth rate of 20 per cent or more, international investment in infrastructure has rocketed over the past two decades. This includes resort developments with marina facilities to accommodate the vessels. One of the largest such endeavours, designed to be the most complete and modern in the Caribbean, is Cap Cana Marina in the Dominican Republic. In its final phase, the marina will have a capacity for 1,000 boats of varying sizes includ-

THESE FLOATING MANSIONS VARY GREATLY IN SIZE AND VALUE, BUT THEIR ABILITY TO BRING IN 'BIG BUCKS' IS WELL KNOWN IN SOUTH FLORIDA

to St Maarten to satisfy the gourmet palates of the yacht crowd. "Although the yachts vary from the 100 ft [30 metre] class vessels with a crew of seven to the 300 ft yachts with a crew of 57, the

ing mega yachts up to 250 ft. Currently, 81 berths are operational, lodging boats up to 130 ft. Investment in this project alone is expected to exceed US\$30 billion.

Although the worldwide



Motor Yacht Perseverance II in Fort Lauderdale. 123 ft Oceanfast.

economic downturn has caused investors to hit the brakes on many of these projects, such as the grandiose Ginn Sur Mur project at West End, on Grand Bahama Island, others have fared better. Emerald Isles Marina, a centrepiece of the Emerald Bay Resort in the Exumas, has been purchased from the Four Seasons, which closed the property in May, by the Sandals Resorts brand. It plans to install an extensive new pool complex and additional dining facilities. The Emerald Bay Resort will reopen on 22 January 2010.

"The Emerald Bay project is a prime example of a project that relied on US freight forwarders for 90 per cent of the needed materials over their six-year build-out, completed in 2004," said Steve Genoe,

of G&G Shipping. "For the first three years we shared the client with another shipping company, but for the second half of the project we had the whole project."

Mike Grandonico, vice-president of G&G, said: "I have really seen a turnaround. During the slowdown a lot of projects were put on hold by the banks, but things are definitely starting to move again."

Christopher Harbour in St Kitts is a new 1,400 unit resort community, complete with a mega yacht harbour and marina village. It was initiated in March 2009 at the bottom of the downturn.

"The St Kitts projects as well as the Albany project in Nassau are going strong," said Mr Grandonico. "Both have a marina component. The yachts and the resorts



Motor Yacht Golden Boy II (115 ft/35 metres) hauled out at the refit facilities of Knight and Carver in San Diego

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Left: Legendary yacht Christina O (3255 ft/ 99 metres) in Villefranche Bay, South of France

Below: Sailing Yacht Odysseus (197 ft/ 30 metres) sailing off the coast of Fort Pierce, Florida



are all part of the circle. We don't just support the project – we offer long-term support service to the resort after they open as well."

CONSUMABLES

Bob Saxon, past president at Camper & Nicholsons, managed one of the world's largest fleets of charter mega yachts. He said: "All consumables on a charter are incurred by the charter client: food, fuel, dockage, boat supplies, provisioning, liquor, flowers and such. A yacht in the range of 125 ft [38 metres] chartering at a weekly rate of \$100,000, for example, would expect to spend an estimated additional 30 to 35 per cent of the base charter hire, or \$30,000 to \$35,000 theoretically, on items acquired and consumed locally. The same formula

holds true for the 180 ft [55 metre] motor yacht chartering at a weekly rate of \$200,000."

There are nearly 2,000 mega yachts wintering in the Caribbean each year, most of them in the eastern Caribbean. They are crewed and provisioned to the highest standards and rightly so. Charter guests can pay hundreds of thousands of dollars a week for their time on board.

Fuel consumption for a yacht under way is high as well. The 'True Blue', a 180 ft Oceanfast, burns 145 US gallons per hour at 15 knots and 344 gallons at 21 knots. A short jaunt around the island can burn thousands of gallons of fuel. Many vessels buy 30,000 or more gallons of marine grade diesel at a time.

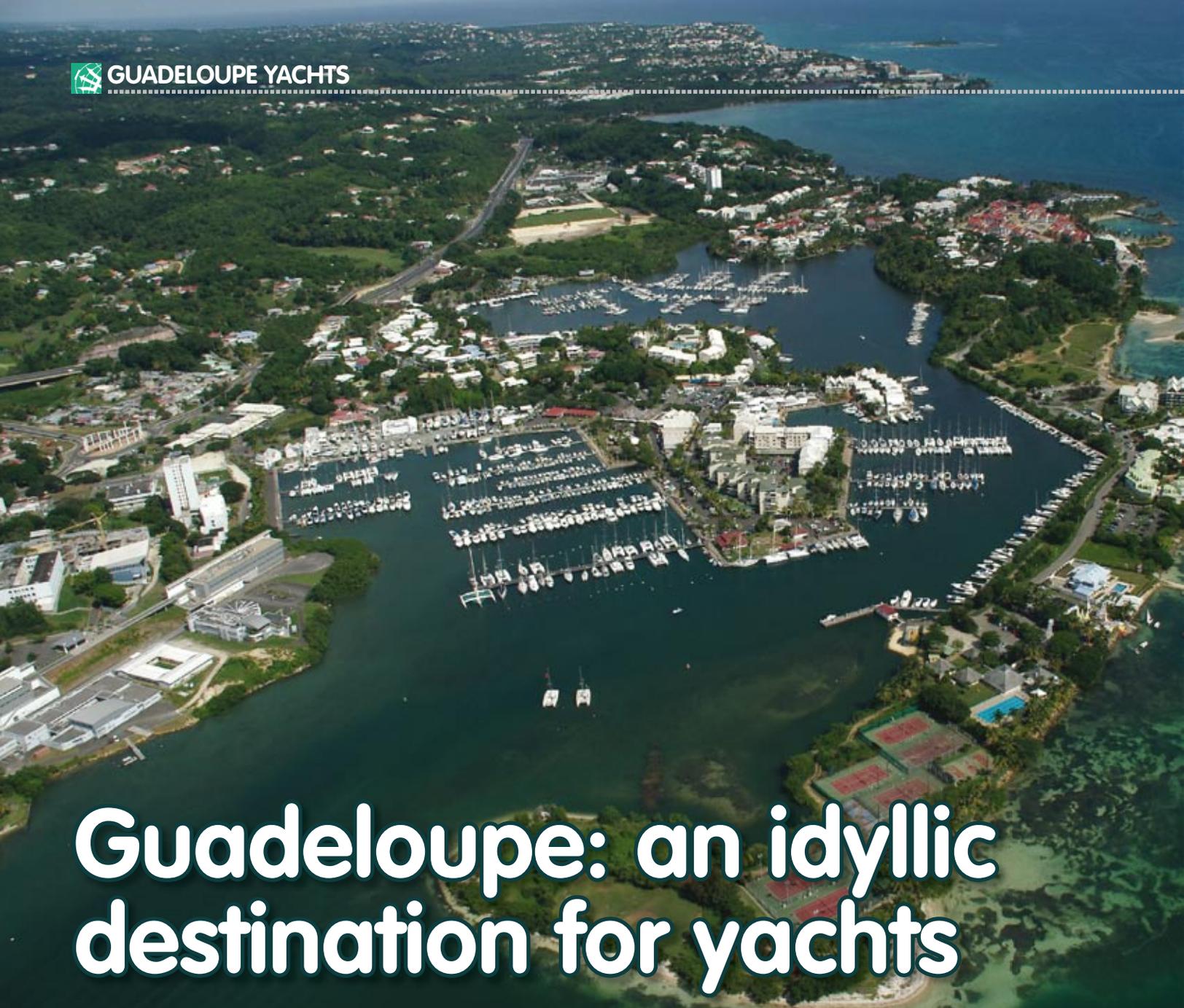
Mr Saxon added: "I can say that any island or country that wants to feel the posi-

tive economic impact that charter yachts can bring should dedicate tourism dollars toward promoting the charter industry. More and more yacht owners are considering their yachts as businesses. And they will position their charter businesses wherever they believe they can generate greater activity. When an island or region of a country becomes identified as a popular charter destination, the big yachts will head there.

"These vessels need a local infrastructure to support their operations and that translates to economic stimulus and local employment. The number of dollars

expended in mega yacht operational support is quite impressive. Decision-makers should be encouraged to consider enhanced support for the mega yacht charter industry in terms of promotional events, marketing materials and co-operative advertising with the various yachting trade groups." 





Guadeloupe: an idyllic destination for yachts

Regarded as the heart of French Creole culture, Guadeloupe is one of the most beautiful islands in the Caribbean. It offers three important sites for super yachts: the Guadeloupe mainland with the port of Pointe-à-Pitre and the Marina Bas-du-Fort; the bay of Deshaies on the west coast; Terre-de-Haut at les Saintes; and Marie-Galante.

MARINA BAS-DU-FORT IN POINTE-À-PITRE

Bas-du-Fort is a perfect haven stop for yachts. There are 10 berths available for super yachts at the Marina Bas-du-Fort. This facility has ISPS security, gated and

monitored pontoons with 24/7 video surveillance and offers competitive prices on request for mid to long-term berthing. Maximum draught is 4.7 metres (15.5 ft). Maximum length overall is 65 metres (210 ft).

- Pilotage is compulsory for yachts of 50 metres (164 ft) and more.
- Fresh water and electricity are plugged to the ships on docking and included in berth costs for yachts under 100 ft.
- Power is three-phase, 50/60 cycles, 30/60 A and 110, 220 and 380 V.

- The harbour office provides Customs clearance and full concierge services.
- Fuel docks are available inside the marina. Users can obtain low-grade sulphur fuel delivered by truck on request.
- Services include engine repairs and technical services. Carpentry and other quality professional services are also available.
- The shipyard has travel lifts for haul-outs.

There is a ship chandler for essential items required by super yacht operators. Other services include car rental, FedEx,



florist, laundry, pharmacy, post office and provisioning.

- Wi-Fi available.
- English-speaking cab drivers can be provided.

The island's dining and night scene is centred on the marina.

PORT OF POINTE-À-PITRE

- Pilotage compulsory for yachts of 50 metres and more.
- Dedicated berths available for mega yachts of 60 metres and more.

- Ship services include fresh water, garbage and sludge removal and ship clearance.
- Bunkers available by barge or truck.

BAY OF DESHAIES

The Bay of Deshaies, west of Guadeloupe, offers protective anchorage for yachts and super yachts. A 25 metre concrete jetty gives direct access to the city. Customs house is just five minutes from the jetty. Main visitor facilities ashore include the botanical garden, fine restaurants, souvenir shops, snorkelling and diving clubs, a zoological garden and a crayfish waterfall at Route des Deux Mamelles in the natural park. Reserve Cousteau, at Malendure beach, near Pigeon Island, has diving clubs and a glass-bottom boat.

Guadeloupe has several points of anchorage for protection against high seas, swells, and winds.

Tailor-made excursions are available on request with qualified and multilingual guides.

TERRE-DE-HAUT AT LES SAINTES

Terre-de-Haut at les Saintes, south of Guadeloupe, is one of the deepest and most protected bays in the world. The historical Fort Napoleon is located on the island.

- No pilotage required.
- The site offers anchorage for yachts

and super yachts.

- Local airport receives small planes and helicopters.
- Shopping and souvenir shops. Good restaurants with Creole and European food.

Terre de Haut has diving activities. Certified diving clubs offer snorkelling.

Bicycles and scooters available for rent.

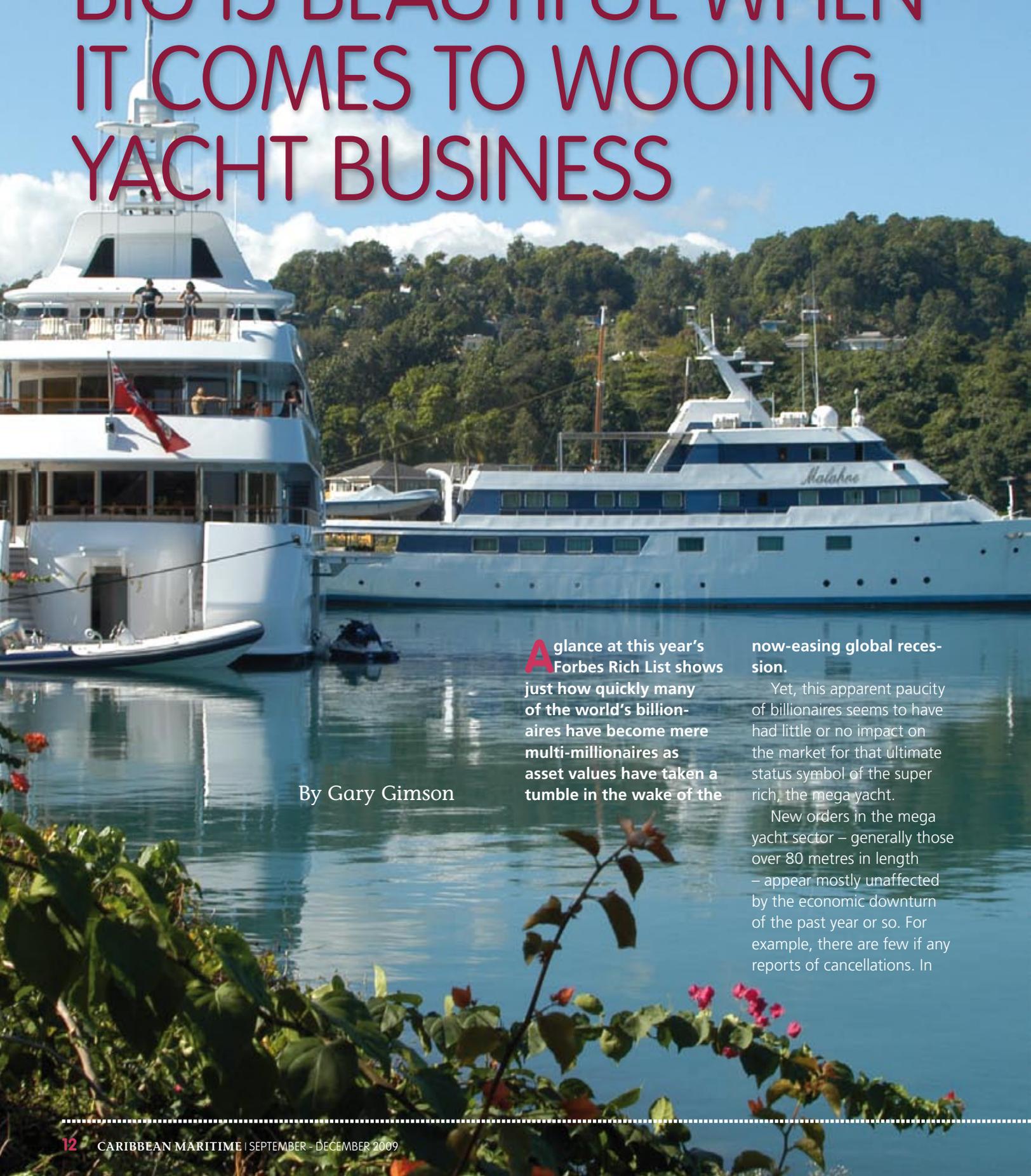
MARIE-GALANTE

Marie-Galante, between Guadeloupe and Dominica, offers beautiful uncrowded beaches and pristine anchorage to the northwest. The island has three rum distilleries and tourists can visit Chateau Murat and several old sugar mill towers including Bezar.

Marie Galante has three towns. The largest is Grand Bourg, with a population of 10,000. Saint Louis has about 4,000 people and Capesterre 6,000.

- Local airport receives planes and helicopters.
- Marie Galante is well known for its peaceful atmosphere and a warm, friendly population.
- No pilotage required.
- Local currency is the euro, but US dollars are accepted. 

BIG IS BEAUTIFUL WHEN IT COMES TO WOOING YACHT BUSINESS



By Gary Gimson

A glance at this year's Forbes Rich List shows just how quickly many of the world's billionaires have become mere multi-millionaires as asset values have taken a tumble in the wake of the

now-easing global recession.

Yet, this apparent paucity of billionaires seems to have had little or no impact on the market for that ultimate status symbol of the super rich, the mega yacht.

New orders in the mega yacht sector – generally those over 80 metres in length – appear mostly unaffected by the economic downturn of the past year or so. For example, there are few if any reports of cancellations. In

fact, industry watchers claim that, the larger the yacht, the more resilient the market segment.

By contrast, the market for super yachts – at least those owned and operated in North American waters – has taken something of a hit in terms of orders and resale prices as cash-strapped owners have sought to quickly offload illiquid assets. There are said to be more than 4,200 super yachts (those over 30 metres in length) worldwide – and nearly 40 per cent of those are for sale.

FAVOURITE WATERS

But even if prices and orders have taken a dip in some sectors, the mega and super

ing, which is focused on a comparatively small number of operators, the mega and super yacht sector is highly fragmented – one in which the destination of a vessel may be decided at short notice or even at the whim of its already on-board passengers. The key in terms of marketing seems to be to get the big yachts to use your marina facilities as a base. One such regional attraction is Errol Flynn Marina in Port Antonio, Jamaica, which has berths for 32 yachts of up to 107 metres in length. The US\$15 million Errol Flynn Marina has proved one of the Caribbean's major success stories, enhancing Jamaica's reputation as an upmarket destination.

NEW ORDERS IN THE MEGA YACHT SECTOR APPEAR MOSTLY UNAFFECTED BY THE ECONOMIC DOWNTURN OF THE PAST YEAR OR SO

yachts are still operating pretty much as before in their favourite waters: the Mediterranean in summer and the Caribbean in winter. So what does all this mean for the Caribbean and for those destinations working hard to attract and retain calls from mega and super yachts? More fundamentally, how does a destination market itself to the big yacht sector? Unlike cruise ship market-

Pat Belinfanti, public relations chief for the Port Authority of Jamaica, said: "Jamaica believes it is best positioned in the hospitality industry when it offers the widest possible attractive and wholesome menu to potential visitors. We believe that the mega yacht component of the leisure industry is an important niche which Jamaica is well placed to tap into; offering another venue with the required amenities and the breathtaking beauty of Port Antonio."

Jamaica also shows that building a fancy marina for fancy yachts is not, in itself, the



answer. Destinations must do more to woo these yachts by offering a package of attractions beyond the bare facilities. Mr Belinfanti said: "The annual Blue Marlin tournament [in September/October], for which Port Antonio has been recognised for decades, has been attracting bumper participation from foreign and local yachtsmen."

He conceded, however, that more still had to be done: "We are the primary tourist attraction in Port Antonio and there were once others, such as the Blue Lagoon, rafting on the Rio Grande, Reach Falls, et cetera. But these have been bereft of visitors in recent years due to poor infrastructure."

FLOURISH

Nevertheless, Mr. Belinfanti believes that issues of weak infrastructure – in particular, the poor road network of the area – are now being addressed and that these attractions will once again enjoy a flourishing business.

Antigua and Barbuda, too, has done very nicely, thank you, from the super yacht

sector and English Harbour has proved a mecca for sailing enthusiasts. Nathan Dundas, of Bryson's Shipping, said: "The yachting business is a very lucrative business for the island as it makes a significant revenue contribution to the economy. At one point the revenue contribution was being compared to what is being derived from cruise ships, indicating that the yachting sector plays a major role in the overall contribution to the island's economy."

The success of Antigua has been replicated elsewhere. For example, both Guadeloupe and Martinique have gained from Antigua's pioneering efforts in attracting super yachts. But not every Caribbean destination has the resources to build super yacht facilities similar to the Port Antonio marina or those on offer in Antigua. And there are those that have invested in facilities to attract super yachts but have not always been pleased with the final outcome or have not managed to back a money spinner – note the failed Ottley Hall Marina & Shipyard project in St Vincent. 



SOUTH FLORIDA REMAINS US CRUISE CAPITAL

By Rick Eyerdam

IN MARCH 2010, following the debut of Carnival Cruise Line's 'Oasis of the Seas', Port Everglades executive director Phil Allen predicts the South Florida port will set another single-day cruise passenger world record with at least 26,000 tourists landing and another 26,000 departing at the same time and place from a dozen cruise ships.

Mr Allen says the ebb and flow of people, baggage, food and other provisions will amount to a logistics achievement unparalleled in modern transportation, except at South Florida's twin cruise

ports. On any busy weekend the Port of Miami moves as many as 30,000 passengers through its cruise terminals on their way to or from a Caribbean adventure.

'THE FRIENDLY COMPETITION AMONGST THE PORTS IN FLORIDA HAS DRIVEN US TO FOCUS ON THE DELIVERY OF EXCELLENT SERVICE'

"I am always amazed and pleased that the terminals, cruise lines, airlines, provisioners and ground transportation can work so efficiently to move so many people on and off these ships in a way that makes everyone both happy and satisfied," said Mr Allen.

Less than a day's travel from the Caribbean, Miami and Port Everglades have capitalised on their efficient airports and favourable location by investing in facilities

excellent service. It's all about the experience, from beginning to end."

WORLD'S LARGEST CRUISE TERMINAL

Port Everglades is investing \$75 million in an expansion of Cruise Terminal 18 to lure the 'Oasis', the world's largest cruise ship, now being built by Royal Caribbean International. When the work is completed in November 2009 this project will boost the interior space from 67,500 sq ft to 240,000 sq ft making it the world's largest cruise terminal.

to keep the cruise lines and their passengers happy from the beginning to the end of their cruise experience.

Port of Miami director Bill Johnson said: "The friendly competition amongst the ports in Florida has driven us to focus on the delivery of

Shocked by remarkably frank criticism from its cruise tenants a few years ago, the Port of Miami immediately



Quick-change world of cruise itineraries

committed to \$170 million of construction projects geared to upgrades and modifications. They included new cruise terminals, remodelling of two existing terminals, two additional multi-level parking garages and access road reconfiguration.

In exchange, Norwegian Cruise Lines committed a minimum of \$106 million in port improvements over 10 years and more than 6.5 million passengers.

Calculations of economic impact are often subjective, so the exact numbers are not known. However, the consensus is that the Port of Miami generates at least \$17 billion in regional economic value each year and at least >

Cruise itineraries are as volatile as the economy and as shifty as the weather.

Although Norwegian Cruise Line has its corporate office at the Port of Miami and operates a fleet from there, it agreed to base its two newest ships, the 5,400 passenger capacity Oasis-class vessels, at Port Everglades in exchange for a grand new terminal.

Each Oasis-class vessels is projected to generate some 584,000 passenger movements a year at Port Everglades. The first of the 220,000 grt vessels, 'Oasis of the Seas', is scheduled to begin sailing year-round from Port Everglades this autumn with a sistership, 'Allure of the Seas', due to begin year-round sailings one year later.

When launched in December 2009, 'Oasis of the Seas' will be the world's largest cruise ship, spanning 16 decks, carrying 5,400 guests at double occupancy and featuring 2,700 staterooms. This will be the first vessel to showcase the cruise line's new 'neighbourhood' concept of seven distinct themed areas:

- Central Park
- Boardwalk
- Royal Promenade
- Pool and Sports Zone
- Vitality at Sea Spa and Fitness Centre
- Entertainment Place
- Youth Zone.

Miami is currently the world's busiest cruise port, followed by Port Canaveral and Port Everglades, but the lead ought to shift with the arrival of the giants.

RECORD

Without the Oasis-class vessels, Port Everglades broke its own two-year-old world record on Saturday, 3 January 2009 when 49,234 cruise

The vessels almost always return to their home ports, but the weather often changes ports of call. In 2008 Hurricanes Hanna, Ike and Josephine swept through the Caribbean and pummelled parts of Texas and the southeast coast, causing chaos among Caribbean cruise planners. At least seven Carnival ships had to change course, including 'Conquest' and 'Ecstasy',



passengers in 11 cruise ships sailed in and out of the South Florida cruise port in a single day. The last record was set on 23 December 2006 with 47,229 passengers. It is said that if all 11 cruise ships lined up bow to stern, they would have stretched 9,869 ft or the equivalent of nearly 31 football fields. They carry enough passengers to fill 105 jumbo jets of the 747 type.

which were rerouted to New Orleans and then Houston. Their final call in Galveston was cancelled because of Hurricane Ike. Royal Caribbean was forced to modify about half a dozen cruises to avoid storms. And NCL had to alter some sailings, including sending the 'Norwegian Spirit' to Bermuda instead of the Bahamas for one trip to avoid Hurricane Hanna.



150,000 jobs. Port Everglades generates at least that amount. Since the ports are less than 40 miles apart, it is likely that economic beneficiaries are occasionally counted twice.

Whatever they are doing in South Florida, it remains the cruise capital of the USA according to data from the Cruise Lines International Association, which currently

places Miami first, Port Canaveral second and Port Everglades third. The CLIA reported that fewer cruise ships set sail from US ports in 2008 than the previous year and fewer Americans went cruising. The report attributes the decline in US departures in part to an increase in departures from Caribbean gateways.

“As a result, the United States not only continued to experience a decline in its share of global cruise activity, but experienced an actual decline in the number of passengers

embarking from US ports,” the report said.

“During 2008 passenger embarkations at US ports totalled nearly 8.96 million, a 2.4 per cent decline from 2007 and a 69 per cent share of global embarkations.”

That compares with 77 per cent of global embarkations in 2004.

GROWTH

Nevertheless, Port Everglades grew 17.6 per cent, reaching 500,000 passengers in January 2009, up from 425,000 passengers in January 2008. Miami cruise passenger business grew 6.9 per cent to 421,000 from 394,000 passengers in January 2008, the most recent data.

During the winter season, Port Everglades welcomed 48 ships operated by 17 cruise lines at its 12 dedi-

cated cruise berths. Miami, with seven dedicated cruise terminals, hosted 24 ships from Azamara Cruise Lines, Carnival Cruise Lines, Celebrity Cruises, Crystal Cruises, Fred. Olsen Cruise Lines, Norwegian Cruise Lines, Royal Caribbean International and Oceania Cruises

“The cruise industry continues to be an engine of economic growth around the world and a positive force in the United States,” said CLIA executive vice president Bob Sharak. “While a two per cent annual increase in cruise industry spending represents a slower rate of growth than our industry’s historical averages, we are gratified and encouraged to post continued gains during this recessionary environment when many businesses are retrenching,” 



Caribbean cruise shipping and flag of convenience: success or failure?

By Fritz H. Pinnock and Ibrahim A. Ajagunna

THE CARIBBEAN is the world's foremost region for cruise, largely because of its proximity to the North American mainland, the industry's largest market (Hall and Braithwaite, 1990). It is a highly complex tourism product, comprising 34 country destinations, spread over more than 1,000 islands (CTO, 2003a).

The region can be subdivided geographically into three areas as shown in Table 1.

Tourism is now by some measures the largest industry in the world. "Travel and tourism today generate between them a significant percentage – possibly as much as 10 per cent of global GDP – and probably account for roughly similar proportions of global capital

investment and unemployment" (Clayton, 2002).

Cruising is a significant sub-sector of the tourism industry, and this is so for two reasons. It is by far the most rapidly growing segment of the entire industry; and it is one of the few to see a genuine concentration of power.

During the past decade, the cruise industry is the tourism sub-sector that has experienced the most rapid growth. While world demand for international trips during 1990 to 2000 grew at an annual cumulative rate of 4.3 per cent, the cruise market grew at 7.9 per cent.

Three basic facts typify a tourist cruise:

- It is in direct competition with on-land holiday resorts
- It is growing and as it increases supply it generates an equal and corresponding demand. Up until the present its non-cyclical character makes it a very attractive

economic proposition

- It is immersed in a process of world-wide

TABLE 1: CARIBBEAN CRUISING REGIONS

Eastern Caribbean – south of The Bahamas to St Maarten as far west as Haiti
Southern Caribbean – south of St Maarten to northern coast of South America as far as Aruba
Western Caribbean – west of Haiti, includes ports in Mexico, Central America and Colombia
Cruise to nowhere – cruises that begin and end at the same port with no intervening calls.



promotion based on the experience gained from the US market. This is the market that designed the modern concept of the tourist cruise, with regards to both supply and demand (World Tourism Organisation, 2003).

The modern era, globalisation and consolidation of the cruise industry

By 1970 most transatlantic lines were cruising the Caribbean. Unprecedented rates of growth characterised the first sub-stage, from 1970 to 1973, but the 'oil crisis' caused these rates to decline substantially. The period from 1974 to the present is classified as the 'aftermath of the oil crisis'. This is also the first era for which statistical evidence is readily available.

Today, cruise tourism is almost completely controlled by transnational corporations (McNulty and Wafer, 1990). The globalisation of the cruise industry has brought about relentless consolidation. Carnival Cruise Line took over Holland America, Windstar, Seabourn, Costa, Cunard and Princess Cruise Lines. Royal Caribbean took over Celebrity. Star Cruises took over Norwegian Cruise Line (NCL) and Orient. Many other companies went out of business or were absorbed into larger entities.

Together, the top three cruise companies control about 80 per cent of the cruise market worldwide, an exceptionally high level of industry oligopoly even by global standards. While these brands have continued to be marketed separately, there is no question that the

territorial link to their original countries of origin (the Netherlands, the UK, Italy and Greece) has been significantly attenuated (Wood, 2004). Wood identified two interrelated aspects of the regulatory regimes within which cruise tourism operators stand out:

- 1 The open registry or flag of convenience (FOC) system
- 2 The weakness of global governance and the privatisation of cruise industry regulation.

In this paper the authors have only emphasised the implications of FOC on cruise shipping in the Caribbean

The flag of convenience (FOC)

Flags of convenience go back at least several centuries, and originally involved ships of lesser powers flying the flag of greater powers for political and military protection, according to Thuong (1987). In the second half of the 20th century FOC took a very different form, with shipowners from the traditional maritime powers preferring to flag their fleets in relatively poor countries. They charged only nominal fees and generally exempted shipowners from taxation and regulation. The United Fruit Company reflagged some of its Great White Fleet cargo ships, which also carried cruise passengers, from the USA to Honduras in the 1920s (Weiner, 2004; Wood, 2004b). But as late as 1940 there were only two FOC states and only one per

cent of the world's tonnage sailed under FOC (Toh and Phang, 1993). Today over half of the world's ship tonnage sails under FOCs (Alderton and Winchester, 2002) and the figures are substantially higher for the cruise industry.

In 2000 cruise ships accounting for 61.6 per cent of the total cruise passenger capacity flew flags of just three FOC states: the Bahamas, Liberia and Panama (ITF, 2001). These registries have been actively promoted by the US government for a variety of economic (that is, keeping US-owned ships competitive by lowering their costs) and political/military reasons (Carlisle, 1981). With respect to the latter, special agreements with these registries give the US government comparable rights to the one exercised by the UK government in requisitioning the liner 'Queen Elizabeth 2' at the time of the Falklands War in 1982.

Lawless competitive dynamic

The modern FOC system was developed after the Second World War by shipowners, first in the USA and later in Western Europe, Japan and other high-wage countries, primarily as an employer strategy to avoid unions and

high wage costs (Johnson 1996; Nortup and Rowan 1983). The FOC system allows shipowners to register their vessels under any flag that would have them. Not surprisingly, many shipowners opt for as little regulation as possible and choose to flag their ships in countries with little or no regulation. The proportion of the world merchant fleet classified as 'flag of convenience' has grown steadily, so that in 2000 the largest shipping nations in the world by flag were Panama, Liberia, Malta and the Bahamas (Unctad, 2000). Because of this, maritime shipping operates in an environment driven by a deregulated – one might even say lawless – competitive dynamic (OECD, 2001).

FOC registers make themselves attractive to shipowners by their more lenient regulatory requirements. For example, they generally have no nationality based employment restrictions, allowing shipowners to hire from anywhere. As a result, capital



and labour can be mobilised on a global scale. A ship might be owned in Greece, flagged in Malta and crewed from India or the Philippines. Maritime employers have learned to mix and match crews of different nationalities according to skills, cost, availability and management prejudices (ILO-JMC, 2001).

tion (such as skill certification), meant that maritime shipping was unique in its potential for developing global collective bargaining. International law specifies that all countries must fly the flag of an internationally recognised state that belongs to the International Maritime Organisation (IMO). Ships

honoured in the breach in the case of most FOCs.

The FOC regime has been criticised for many years for being little more than a mechanism to obscure ownership and to avoid tax, safety, environmental and labour regulations (Li and Wonham, 1999). More recently, it has come under

and others. But the system has been largely impervious to change because of the way the IMO is structured. Voting rights are on the basis of tonnage and so FOC states basically control the organisation to the detriment not only of the traditional maritime states but of most developing countries as well. This form of global governance, vesting power in those whose position depends on minimal regulation, clearly functions mainly to constrain it, just as the WTO exists as much to prevent others from regulating trade as to set the rules for trade itself (Wood, 2004a).

Wood (2004b) argued that the economic health of the cruise ship industry – and its competitive position in relation to land resorts – is crucially based on the FOC system. This is most obviously true in the case of labour costs. National ship registries have traditionally required that a substantial proportion of a ship's crew should

THE FOC REGIME HAS BEEN CRITICISED FOR MANY YEARS FOR BEING LITTLE MORE THAN A MECHANISM TO OBSCURE OWNERSHIP AND TO AVOID TAX, SAFETY, ENVIRONMENTAL AND LABOUR REGULATIONS

After a period of downward spiralling wages and conditions in the 1980s, the international seafaring labour market stabilised in the 1990s. A global institutional infrastructure developed to hire crews from low-wage seafaring labour supply countries for work anywhere in the world (ILO-JMC, 2001). The ineffectiveness of national regulatory frameworks, combined with the globalisation of some aspects of labour market regula-

tion acquire the nationality of the flag state that registers them and it is the responsibility of the flag state to certify them and to enforce applicable international regulations. The 1958 Geneva Convention on the High Seas asserts that there should be a 'genuine link' between the state and the ship, especially in terms of control (Li and Wonham, 1999) but, in fact, this is largely

scrutiny for its potential usefulness to terrorist organisations.

FOCs have been a prime target in several grassroots campaigns targeting cruise ships: the International Transport Workers' Sweatshop Campaign, Blue Water Network's Cruise Ship Campaign, Ocean Blue Foundation's Cruise Ship Initiative Campaign, Oceana's Cruise Pollution Campaign



be nationals and should be governed by national labour regulations. Under competitive pressure from the FOCs, some national registries have loosened the crewing nationality requirements in systems that have become known variously as second or captive registries. But not all such systems exempt workers from national labour regulations entirely, and so

It is true that a cruise ship job may seem preferable to the alternatives available in eastern Europe or South East Asia, but the fact remains that only a combination of de-territorialisation and globalisation makes the existence of such jobs possible, for better or for worse. The cruise industry is unique in having access to a truly global labour force (Wood

Carnival President Dickenson correctly observes, in 'Selling the Sea', that these tax and labour advantages of FOCs are what "makes it possible ... to offer cruises at much lower cost" than would be otherwise (Dickenson and Vladimir, 1997).

These advantages have led the land-based tourism industry, particularly in the Caribbean, to complain

of shipowners whose ships cannot even meet the minimal requirements of traditional FOC states (Alderton and Winchester, 2002).

In the cruise sector, both market and political forces act to deter such extremes. While there appear to be differing levels of passenger acceptance of FOC registry (Cartwright and Baird, 1999), cruise ship and passenger safety is central to the industry's marketing and profitability. Those aspects of cruise ship design that have been criticised from a safety standpoint, (for example, atriums that can spread fires and the logistics of unloading 5,000 or more people from high-sided vessels on the high seas) do not depend on FOC registry. Nonetheless, questions of the adequacy of FOC state safety oversight have been raised in some cases – for example, the cruise ship sinkings of 'Fantome' in 1998, 'Sun Vista' in 1999 and 'Sea Breeze' in 2000 (Wood 2004). Under the rules of the IMO that currently govern ship registration, the country of registration is responsible for the enforcement of relevant laws and conventions.

Major limitations

There are three major limitations to this, however.

The first is that FOC states are less likely to sign these conventions and hence not be subject to them even if they do come into force. Alderton and Winchester (2002) find that, whereas traditional maritime states have on average ratified 61 per cent of IMO conventions, 'old FOCs' (which include the major cruise line FOCs)

FOR MANY SHIPOWNERS, AN ADDED APPEAL OF FOCS IS MINIMAL REGULATION AND HENCE LOWER COSTS FOR VESSEL MAINTENANCE

FOCs have retained their competitive edge, particularly for cruise companies. In Ship Management (Spruyt, 1994) it was calculated that for a ship with a 24-member crew, the difference between an all-Northern crew and an all-Chinese crew came to US\$698,400 a year.

Considering the fact that the larger cruise ships have over 1,000 crew members (about 70 per cent of them on the hospitality side), the labour cost savings afforded by FOCs are enormous. But wage savings are not the only factor. Just about no country's labour laws would allow a company to require a seven-day week of 12 or more hours per day for four to six months at a time without a single day off – and effectively ban unions as well. Nor would they be likely to allow the kind of ethnic recruitment and discrimination that goes on in some cruise lines, where different ethnic groups are slotted into different positions on the job hierarchy (Wood 2004b).

2000). In a study of the shipping industry in general that sees it as having 'gone furthest down the globalising path' Bloor et al. (2000) observed that:

"It might be thought that poor and hazardous working conditions are concentrated in the declining and backward sectors of the industry. This is not the case. Although conditions do vary considerably between different sectors, some of the very worst conditions for crews are actually to be found in the booming cruise sector."

FOC states are universally also tax havens. The combination of tax regimes in registry states and in (the often separate) states of incorporation – along with the unique double taxation provisions for passenger transport companies in the countries where cruise companies have their operational headquarters – results in the leading cruise companies paying almost no corporate taxes in the countries where they are actually headquartered.

bitterly about the lack of a level playing field between territorially rooted hotels and resorts on the one hand, and de-territorialised cruise ships on the other. So central are FOC-based prerogatives that one highly critical analysis of the effects of the FOC regime on cruise industry environmental behaviour nonetheless rejects the idea of eliminating FOCs out of hand because such an action 'would be financially devastating to the cruise industry (Schulkin, 2002).

For many shipowners, an added appeal of FOCs is minimal regulation and hence lower costs for vessel maintenance. About 150 ships sink each year. The rate of FOC ship loss is well over twice the rate for nationally registered ships. Indeed, the growth of new FOC registries, for example, in landlocked states that allow ship registration requirements, reflects 'the market-based nature of these registers'. New FOC countries see a niche in serving the needs

have ratified only 49 per cent and 'new FOCs' only 37 per cent. More specifically, of 22 cruise ship-relevant international conventions cited in an Ocean Conservancy study, the three major cruise ship FOC states of Panama, Liberia and the Bahamas had failed to ratify 11, nine and eight of these conventions, respectively (Ocean Conservancy, 2002).

Second, FOC states have sufficient voting power to prevent conventions coming into effect, since voting is linked to registered tonnage. For example, the highly relevant Annex IV (covering sewage treatment and discharge) of the International Convention for the Prevention of Pollution from Ships (Marpol) has never come into effect because of insufficient FOC state ratification.

Third, the fact that it is the responsibility of the registry state to investigate and punish ships flying its flag that violate either international or port state laws, results only very rarely in any action. In the USA, a General Accounting Office (GAO) 2000 study found that, of 111 cases of illegal discharges by cruise ships in US waters referred to registry states, no penalties were imposed apart from two minor fines. The IMO has no power to enforce its conventions itself.

The Caribbean scenario

Cruise tourism has been embraced as part of the general tourism strategy for development. Tourism is intended to replace the economic fallout from banana and sugar without

any independent in-depth analysis from a Caribbean perspective. This thesis explores some fundamental sustainability challenges and issues for the future, beyond the unidimensional measure of the total number of passengers landed as the primary measure of the industry success.

One key indicator of the extent to which the Caribbean has been heavily exploited by rather than benefiting from the cruise industry is the remarkably low (or negative) profits.

The FCCA in 2001 published an Economic Impact study showing the Caribbean accounting for about 50 per cent of the total cruise ship deployment with estimated earnings of US\$2.3 billion from the industry. The Mediterranean, with just one-fifth of the Caribbean's market share, earned six times more than the total of Caribbean revenues. This indicates that the Mediterranean generates about 30 times more revenue per capita than the Caribbean. This is a measure of the Caribbean's failure to understand and profit from the industry or its failure to understand the tourism systems.

Alaska is comparable to the Mediterranean and provides an example of how to generate far more revenue while giving the environment far better protection through legislation. A repeat of the study by the FCCA in 2006 showed the Caribbean as the destination with the largest number of visitor arrivals and with gross earnings declining to just under US\$1.8 billion (that is less than 2001), yet

with record cruise calls and passenger numbers, indicating that profit margins were actually squeezed even more tightly.

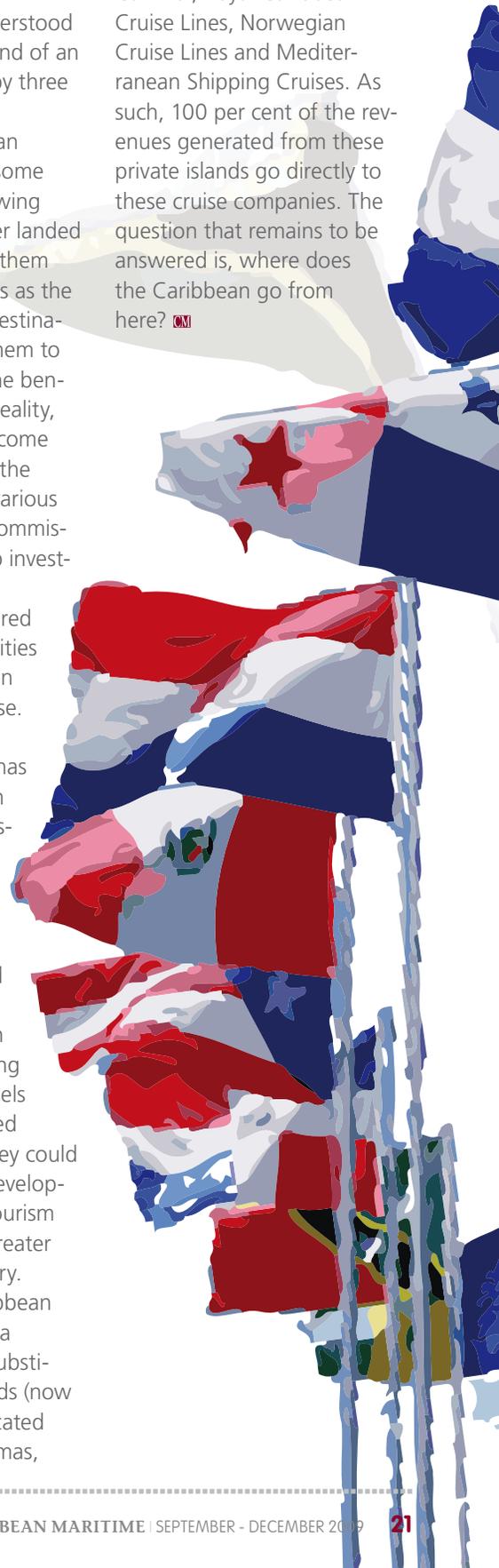
This has to be understood against the background of an industry dominated by three powerful cruise lines.

However, Caribbean governments derive some benefit from the growing numbers of passenger landed and this has allowed them to report their success as the numbers climb in a destination. This may help them to get re-elected, but the benefits do not filter. In reality, most of the actual income finds its way back to the cruise lines through various channels, including commissions and partnership investments – for example, joint investment/secured loans in terminal facilities development between government and cruise.

Over the past 30 years the Caribbean has moved from being an exotic, high-value destination to now a 'mass market' low-value, high-volume destination. The capital outlay needed by each Caribbean country just to stay in the game of facilitating larger and larger vessels needs to be reassessed carefully, as this money could be better spent on developing the land-based tourism products that yield greater benefits to the country.

Likewise, the Caribbean has been reduced to a generic destination substituted by private islands (now numbered 12 and located primarily in the Bahamas,

the Dominican Republic and Haiti). These private islands are owned and operated by the four largest cruise lines: Carnival, Royal Caribbean Cruise Lines, Norwegian Cruise Lines and Mediterranean Shipping Cruises. As such, 100 per cent of the revenues generated from these private islands go directly to these cruise companies. The question that remains to be answered is, where does the Caribbean go from here? 



A PROACTIVE STRATEGY TO FILL CRUISE SHIPS

By Jan Sierhuis, chairman, CSA Cruise Committee

The partnership between the cruise industry and the Caribbean is surviving the current economic tide – and this is cause for optimism. Even at the bottom of the downturn in the USA, ships are still sailing to the Caribbean and the industry is successfully filling them. Moreover, the H1N1 influenza outbreak and other health and security threats do not seem to be having a negative impact on the industry and the Caribbean cruise market.

The Cruise Line International Association (CLIA) has issued statements and implemented programmes that continue to offer cruises

as a safe, healthy and desirable vacation option. CLIA members are working closely with US and World Health Organisation (WHO) officials to implement the required procedures to help reduce health and safety risks and to communicate this fact to the public. An intensive CLIA summer marketing campaign is helping member lines to entice consumers with special offers, additional discounts and delayed payment options. The message is that cruising is good for your health and for the economy.

REASSURING MESSAGES

While many Caribbean hotels are laying off personnel because of the economic

situation, the cruise industry is on a proactive strategy aimed at keeping the ships sailing full. This is achieved

CRUISES ARE PRICED MORE ATTRACTIVELY THAN EVER AND SPECIAL DISCOUNTS AND DELAYED PAYMENT PROGRAMMES EXIST FOR TARGETED AUDIENCES

by enticing the public with reassuring messages that cruising helps to relieve stress and at the same time helps the economy. Cruises are priced more attractively than ever and special discounts and delayed payment programmes exist for targeted audiences such as families, singles, first-timers, senior citizens and groups.

CLIA launched its summer marketing campaign, 'You Deserve a Cruise', with its member lines and cruise

agents. Because of the focus on relaxation and pricing, the Caribbean is in high demand and many destinations are expecting record visitor numbers for the upcoming winter season. True, average visitor spending in the islands may be down as more discount passengers arrive; but, overall, the sector and the Caribbean cruise destinations will survive thanks to the proactive approach of the industry. Criticised by many in the Caribbean, the industry should really be applauded for its efforts in these trying times.

NON-US MARKETS

The European cruise market has grown substantially over the past five years. This year, growth seems to be consolidating, although some destinations do mention the arrival of new European customers.

For the time being, it is expected that European



ships will ply Caribbean waters mainly in the winter season. For the time being, all hopes for alternative summer business come from developments in the Latin market being served out of Panama and Colombia. If this market develops further, it offers interesting opportunities for home port development in the southern Caribbean. Latin passenger spending patterns are high and they travel with families and friends. More Caribbean promotion in this market could assist the operators developing these itineraries and create lasting partnerships that could also spill over to non-cruise markets. It is a maturing market that some island destinations are beginning to pursue.

2010 AND BEYOND

The order book for 2010 stands at 14 new ships with four smaller luxury ships and the remainder large ships with a capacity of 2,000 to 5,000 passengers. It is now assumed that by mid 2010 the US economy will be in recovery and that this new capacity will be absorbed by the market. Many if not all of these new ships will operate in the Caribbean.

After 2010 the industry seems to be holding back on its order book. For 2011 nine new ships have been confirmed and for 2012 only four bookings are confirmed. Once the 2010 capacity is absorbed and economies have recovered, however, it is expected that new orders will come on stream. The industry is in good health and the demographics in the main source markets work in its favour.

If the Caribbean continues to deliver the experience for the changing tastes and needs of the consumer, the ships will continue to come to our shores. Many destinations are now preparing for the future and are investing in the necessary infrastructure and services to accommodate these ships and passengers. Those that do not act now will most likely lag behind tomorrow.

CARIBBEAN INVESTMENTS

Given the proven health of the cruise industry, most cruise-related investments in the Caribbean seem unaffected by the economic situation. The size of the ships and the capital-intensive infrastructure required to handle them cause many destinations to turn to the industry for financing and, in some cases, participation in cruise-related investments. Mexico, Belize, Jamaica, St Maarten, Antigua, Panama, Cartagena, Curacao and many others are now in various stages of planning or executing joint cruise investment programmes. Some people question the nature of such investments from a long-term perspective. In reality, however, it seems the only way to keep up with developments. And, finally, the cruise lines are now becoming an investment partner for the Caribbean, something long advocated by industry critics.

LONG-TERM

The fact that the industry is willing to invest demonstrates that there is no intention of leaving the Caribbean. There will be investment in other



markets and destinations so as to spread the risks but, in difficult times, the industry has always returned to its Caribbean base. Cruise investments by nature are long-term; and periodic economic downturns need to be included in the equation. Public-private sector partnerships can help to mitigate the risks involved and can help to commit the industry to the destinations.

CSA CRUISE COMMITTEE PROGRAMME

In view of the challenges facing the industry and the

Caribbean, the Caribbean Shipping Association's Cruise Committee now, more than ever, must actively promote the interests of cruise tourism in the Association and in the region. For 2009 and 2010 the committee will focus on improving the cruise section of the CSA website, health and safety issues, including the H1N1 pandemic, regulatory changes and environmental impact issues. The committee plans to produce a paper for discussion on the position and role of CSA in formulating Caribbean policies in these areas. [CSA](#)

Cruise industry in team effort to combat swine flu

The need for a regional policy and protocol to deal with the H1N1 virus was discussed at a special meeting in Barbados involving regional and hemispheric organisations including the Caribbean Shipping Association (CSA), which led the initiative.

The CSA supports the introduction of a regional policy in response to the H1N1 virus as a situation has developed in the Caribbean region in which cruise ships have been turned away from

global pandemic by the World Health Organisation (WHO) on 11 June, the H1N1 influenza strain, or 'swine flu', has been the subject of news reports around the world, causing widespread fear. Over 170,000 laboratory-confirmed cases of H1N1 have been officially reported to the WHO and over 1,400 deaths have been linked to the virus.

MEETING

The meeting, held in Bridgetown on 31 July, brought together the major companies represented by Cruise Lines International Associa-

OVER 170,000 LABORATORY-CONFIRMED CASES OF H1N1 HAVE BEEN OFFICIALLY REPORTED TO THE WHO AND OVER 1,400 DEATHS HAVE BEEN LINKED TO THE VIRUS

some ports and allowed to berth in others. There is no single policy and therefore no standard response across the region to this global pandemic as it relates to the cruise industry.

Since it was discovered in humans in March 2009 and declared a Level 6

tion (CLIA). Steve Collins and Federico Gonzalez-Denton represented Royal Caribbean Cruise Lines and the Florida Caribbean Cruise Association (FCCA). Also in attendance were senior doctors from cruise lines based in Miami. Regional interests were represented by Caricom and the Caribbean Tourism Organisation (CTO) as well as the chief medical officers of a number of Caricom countries. The CSA was represented by Nathan Dundas, vice chairman of its Cruise Committee and president of the Antigua

and Barbuda Cruise Tourism Association (ABCTA), who was instrumental in setting up the Bridgetown meeting. Mr Dundas was delegated to speak on behalf of the CSA as neither President Fernando Rivera nor CSA General Manager Clive Forbes could attend.

STANDARDISATION

The meeting was co-chaired by Dr Rudolph Cummings, of the Caricom secretariat, and Dr Bernadette Gandhi, of the Pan American Health Organisation (PAHO). Dr Gandhi stressed the need for regional standardisation of a protocol and policy in dealing with the H1N1 virus across the Caribbean and for a balance between health concerns and the importance of the cruise industry to the region.

Dr Cummings shared his views. He said the purpose of the meeting was to find a way forward that would benefit all concerned – both the citizens of the Caricom countries and the cruise lines. There was an urgent need to reach a clear understanding of procedures to be followed in a standardised manner across the region.

PRESENTATIONS

The cruise lines made two revealing presentations that dealt with their operations prior to passenger boarding and also on board the ships. They emphasised the thoroughness used in limiting and controlling the spread of the virus whenever detected on board the ships. And they showed the medical and preventive procedure and protocols as laid out by local authorities and by the Centre for Disease Control (CDC).

There were lively and positive discussions between the cruise lines and the CMOs as all interests worked to find a strategy for defining a protocol that would be effective for all stakeholders. The discussions ended on a positive note with plans for follow-up action that will see regional stakeholders meeting in the near future with a much wider group of interested groups and organisations as well as other CMOs. The plan is to develop a protocol that will be used as a standard document across the region.

ASSISTANCE

Mr Dundas acknowledged the assistance from Dr Rhonda Sealy Thomas, of Antigua and Barbuda, Dr Rudolph Cummings, from Caricom, and Dr Gandhi, from PAHO, Barbados, in arranging the meeting. He expressed the CSA's satisfaction that the region would be getting a standard protocol that all the cruise destinations could apply in dealing with the H1N1 virus as it affects the cruise industry.

The meeting was timely, he said, as the winter cruise season would be starting soon, with some ports receiving as many as 15 ships a week. Without a clear policy across the region, there would have been unnecessary delays and, possibly, disastrous consequences for this vital industry, said Mr Dundas. He said the finished document would provide a model for other regions outside the Caribbean for dealing with the cruise lines and it was fitting that the Caribbean, as the world's number one cruise destination, was taking the lead. 



Strong and Reliable

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TRAFFIC: Vessel calls per year approximately 40

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CRUISING TO GUYANA – A UNIQUE VISITOR DESTINATION

Despite the worldwide economic slowdown, the cruise industry in Guyana is gearing for the future, with limited expansion anticipated.

Guyana is helping to keep interest high in the region's tourism industry by promoting itself as a tourist destination, according to industry analysts.

Despite some notable limitations, such as the absence of large expanses of white sand beaches, and draught constraints when entering the Demerara River, there has been a notable increase in cruise ship arrivals and stopover visitors in recent years. This has caused the Guyana authorities to pay some attention to the limitations.

The promotion of eco tourism as an alternative is being looked at and some resources are being diverted to this area. According to Guyanese sources, a consci-

entious effort is being made to dredge the channel in order to accommodate larger vessels. Recently, Guyana received the cruise ship 'Spirit of Adventure' on its second visit after its maiden voyage in 2007. This vessel, which is designed specially for the Arctic and Antarctic regions, was carrying 197 crew members and 201 passengers, mainly Europeans and South Americans. It was decided to include Guyana on the South American leg, which embraced Suriname and Brazil.

Speaking at the welcoming ceremony, tourism executives referred to Guyana as "untouched territory" in terms of tourism. They expressed the hope that other vessel operators would include Guyana in their itineraries.

GREAT POTENTIAL

Comments from cruise passengers were encouraging. Some referred to Guyana as a "wonderfully warm country" and said it had great potential for sightseeing.

As representatives of Saga Shipping, the vessel's agents, Guyana National Shipping Corporation Ltd has opened its doors to the cruise indus-

try and has made its facilities available for the docking of tourist vessels.

The local tourism authority believes there is a good future for tourism in Guyana and says it wants to see more cruise ship arrivals. In fact, this year there will be an emphasis on training more personnel to handle vessels such as the 'Spirit of Adventure' and even larger cruise ships that choose to visit Guyana.

As a vast country with exotic flora and fauna, it has everything that nature lovers and eco tourists could possibly want. Quite recently, it featured in the BBC TV series 'Lost Land of the Jaguar'. Guyana is also recognised as one of the world's top destinations for birdwatching.

MARKETABLE ATTRACTIONS

The local view is that, because of its largely untouched natural assets and breathtaking beauty, Guyana offers a unique and marketable visitor experience. Tours to Kaieteur National Park can be a winner. The Kaieteur Falls is easily the world's tallest single-drop waterfall at 740 ft – about five times the height of Niagara. Other attractions that could be readily marketed include the

Arrowpoint and Baganara resorts; Demerara Distillers Ltd, home to the world-renowned El Dorado Rum; and the Steel Pan Heritage Museum, founded by Roy Geddes.

TOURISM

Because it is totally different, Guyana's tourism product could lure visitors back for many more exciting trips. This potential for growth and development could have a positive effect on the national economy – a reality that is not lost on the local authorities.

The local tourism industry has not been drastically affected by the recession. There has been no retrenchment of workers. Indeed, the government plans to train more people in this sector to prepare for growth in the nation's tourism industry. At the same time, the government and the Guyana Tourism Authority are encouraging tour operators to work assiduously to bring even smaller cruise ships to the country. Other vessels that have visited Guyana include the 'Minerva II', with over 800 passengers, the 'Clipper Adventurer' (over 100 passengers) and the 'MV Hanseatic'. 

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entious effort is being made to dredge the channel in order to accommodate larger vessels.

Recently, Guyana received the cruise ship 'Spirit of

SURINAME CRUISE SECTOR ENJOYS A MODEST UPTURN

By Ivan Cairo

Suriname is enjoying a modest upturn in cruise business and the government is said to be planning a multi-million-dollar cruise terminal in Paramaribo.

The number of cruise ship arrivals in the Dutch-speaking South American country has grown significantly in recent

years. Although Suriname does not have the picturesque sandy beaches offered by many other tropical destinations, it does have a rich history, cultural diversity and exquisite local cuisine as well as pristine tropical rainforests with awesomely exotic flora and fauna.

A number of cruise shipping agencies, especially European companies, have

rediscovered Suriname, while various locally based shipping companies and tour operators have now tapped into the cruise tourism market. Since 2005 agents for cruise tourism and marketing companies in Germany, Italy and the UK have visited Suriname. Subsequently, more and more cruise ships have been dropping anchor in the country's waters.

tourists who are not seeking the traditional "sun, sea and sand" experience could find Suriname a delightful and unusual destination in which to spend time ashore.

In October 2006 a delegation from Germany including cruise specialist Friedrich W. Oldenburg, of Dream Cruises, and Marc Pasture, a former marketing manager of TUI and RWE, visited Suriname. Both specialists said the country had a lot to offer cruise tourists. They both argued that Suriname needed better marketing to promote its unique products.

CRUISE VISITS

From 2005 to 2007 Suriname received 10 small cruise ships and 2,730 tourists. The 'Clipper Adventurer' from Clipper Cruise Line arrived with 250 passengers in 2005. In 2006 four cruise vessels docked in Suriname: 'Minerva II' from Swan Hellenic with 560 pas-



STUDIES

Marketing and feasibility studies have fingered Suriname's location as a challenge. The country is outside the traditional routes of cruise ships and the limited depth of the fairway in the Suriname River makes it impossible to handle larger cruise vessels. The absence of a cruise terminal is also cited as a disadvantage. On the other hand, Suriname is seen as an interesting destination for a niche market. Cruise

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sengers; 'MS Bremen' and 'Hanseatic' from Hapag-Lloyd Kreuzfahrten, both with 180 passengers; and 'Clipper Adventurer' from Clipper Cruise Line with 120 passengers.

The Inner City of the capital, Paramaribo, with its colonial architecture, provided a unique backdrop for cruise visitors. Here, the largest synagogue in the western

A NUMBER OF CRUISE SHIPPING AGENCIES, ESPECIALLY EUROPEAN COMPANIES, HAVE REDISCOVERED SURINAME

In 2007 there were five cruise ship arrivals: Swan Hellenic's 'Minerva II' with 600 passengers; 'Sea Dream II' from Sea Dream Yacht Club (150 passengers); 'Spirit of Adventure' from Saga Cruises (400); 'Clipper Adventurer' from Clipper Cruises (110); and 'MS Bremen' from Hapag Lloyd Cruise Line (180).

Most of the arrivals were handled by the Movement for Eco Tourism in Suriname (METS), which secured a land arrangement contract with several of the cruise ships. The 'Spirit of Adventure' was handled by Continental Shipping Agency.

Cruise visitors were taken on sightseeing tours. Options included trips to the Comewijne district, with its rich plantation history; bird watching; and the Peperpot cocoa and coffee plantation.

hemisphere is located next to a mosque; there is a tranquil palm garden; and the Roman Catholic cathedral, on the Unesco World Heritage list, is said to be the tallest wooden structure in South America.

REVENUES

In 2006 Suriname earned about US\$100,000 from the four cruise ship arrivals including an immigration fee of US\$5 for each arriving passenger.

A local study concluded that, with a formal cruise terminal in place, the country could earn up to 10 million and handle at least 20 cruise vessels a year. The government is finalising plans to build a US\$35 million cruise terminal at the popular Waterfront area of Paramaribo.

Erik Kuiper, marketing manager of METS, told **Caribbean Maritime** the

arrival of cruise ships could have a tremendous spin-off for local businesses. He said the local water company, waste collectors and fuel suppliers had benefited significantly from the cruise calls.

"These ships need a huge volume of fresh water," said Kuiper. "They produce a significant amount of waste they need to get rid of. We needed hundreds of truckloads to take the garbage to the landfill." He pointed out that restaurants, the craft sector, local food producers and distributors of fruit and vegetables could all benefit from the cruise industry.

According to the World Tourism Organisation, the tourism industry is one of the

fastest growing areas of the service sector, with revenues worldwide heading towards US\$800 million a year. This is expected to double by 2020.

IDENTITY

Suriname is trying to secure some of the benefits from the cruise industry, including a stronger cultural identity and sustainable development. At the same time, it is mindful of preserving local traditions and protecting its cultural heritage.

"Suriname is on such a crossroads to benefit from the opportunities from the tourism sector," wrote Henry Orie, chairman of the board of the Suriname Tourism Foundation, in a newspaper article in 2006. 



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NEWSBRIEFS

PORT OF MARIEL TO GET BRAZILIAN CREDITS

Brazil announced in July that it would give Cuba up to \$300 million in credits to start rebuilding the port of Mariel. Brazilian Industry and Trade Minister Miguel Jorge said \$110 million had been approved by his government and the rest was likely to be approved as Brazil strengthens its ties with Cuba. There are unconfirmed reports that the entire port project will cost up to \$2 billion. The first phase, expected to take four or five years to complete, will cost \$600 million. Cuba plans to position Mariel as a logistics centre for its emerging offshore oil industry and to be equipped to handle shipments from around the world, including the USA. US-Cuban trade is still restricted by a US trade embargo imposed in 1962, three years after the Fidel Castro revolution. Miguel Jorge, who was on a two-day visit to Cuba, said Brazil's state-owned oil giant, Petrobras PBR.SA, which was awarded a bloc for oil exploration in Cuban waters in October 2008, would set up an office in Havana. He said Petrobras was completing seismic studies of the bloc and working on getting a drilling rig to Cuba. He did not say when Petrobras expected to begin drilling.

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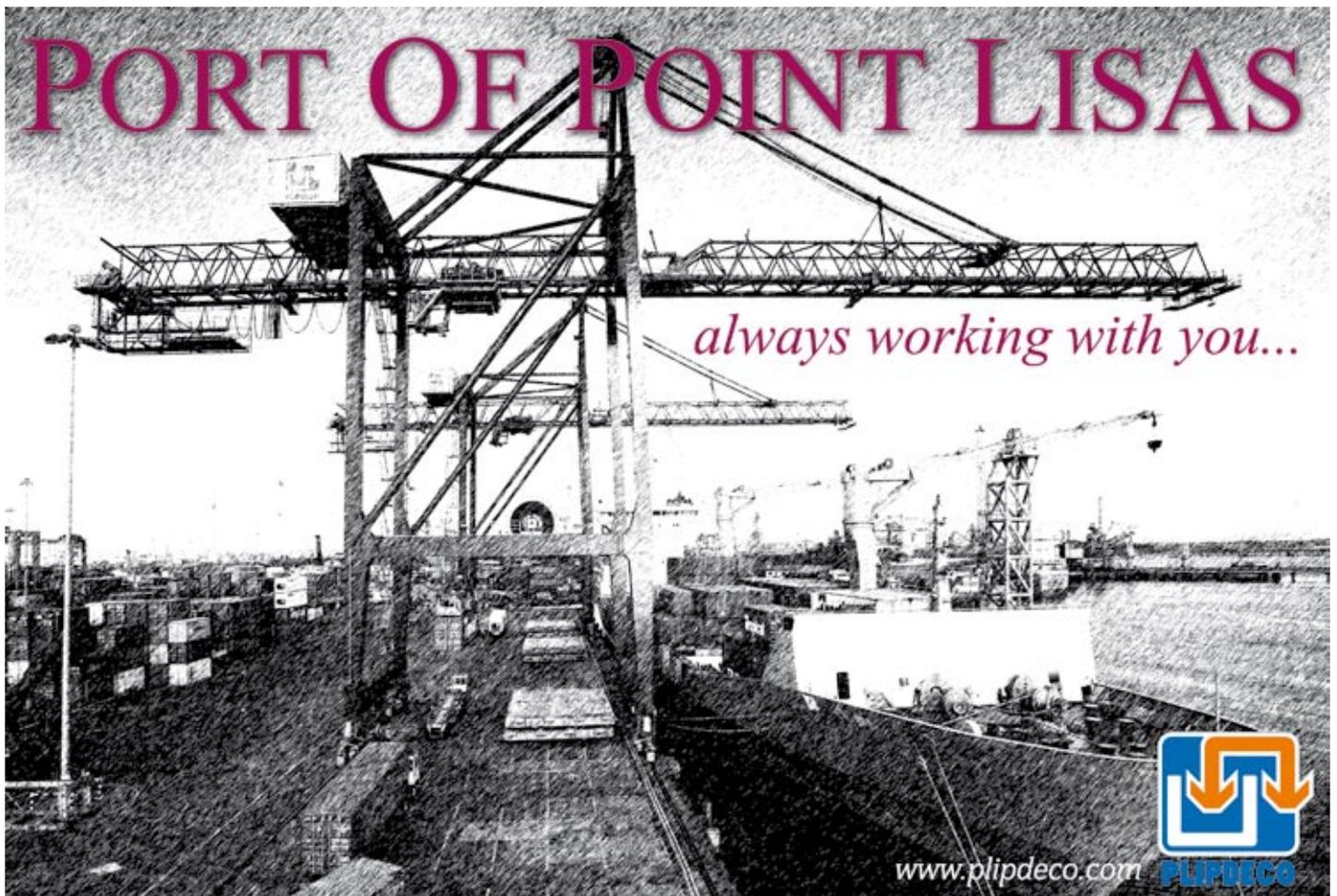
BEDY Oceanlines in August announced plans to establish an inter-island ferry service. This new service, owned and operated by BEDY Oceanlines, was expected to be officially launched on 1 October with the maiden voyage scheduled for 20 October. In a statement out of St George's, the company said it had delayed the July launch of the service to allow the acquisition of a second ferry. One ferry will be based in St Vincent and will serve the St Vincent to Barbados and St Lucia route. The second ferry will be based in Grenada and will serve the Grenada to Trinidad and Barbados route. The company anticipates that other neighbouring countries will be added to the operation soon. The service promises patrons a fast, reliable, comfortable, safe and "extremely cheap" way to travel. The ferry will provide a daily service.

TROPICAL MAKES DEAL WITH PORT OF PALM BEACH

The Port of Palm Beach District says it has reached a five-year contract amendment with Tropical Shipping. The amendment gives Tropical Shipping the newly negotiated rates at the Port of Palm Beach until June 2013. The contract provides for increases in revenue to the port and additional incentives for Tropical Shipping to increase annual tonnage through the port. Tropical Shipping is an important tenant of the port, providing dry, refrigerated, LCL, consolidation, cargo transfer, inland transport and project cargo services in The Bahamas and throughout the Caribbean. The port handles nearly 3 million tonnes of cargo and 245,000 containers annually.

CMA-CGM ANNOUNCE REEFER SURCHARGE

CMA CGM and affiliates Delmas, MacAndrews, ANL, US Lines and Cheng Lie have announced the introduction of a reefer consumption surcharge effective in all US inbound and outbound trades on 16 October. All other trades as of 1 October. CMA CGM and subsidiaries had not been billing the additional reefer consumption costs to their customers, having had a similar bunker adjustment factor (BAF) structure for both dry and reefer containers. In order to have a more transparent and true segregation of costs between these two distinct segments it was decided to make this an integrated part of freight surcharges. The reefer consumption surcharge incorporates the actual cost of fuel. It will be revised on a monthly basis, together with the general BAF levels. The levels of the new surcharge will be reflected on CMA CGM's BAF/CAF finder on its web site at www.cma-cgm.com. Claus P. Ellemann-Jensen, vice president reefer, CMA CGM Group, said: "One of the main differences between dry containers and reefer containers is the energy consumption needed to maintain the temperature during transportation as well as to properly ventilate containers carrying perishable commodities. The electricity used for reefers aboard container vessels means extra fuel consumption, thus extra cost for both shippers and carriers. With this reefer consumption surcharge, CMA CGM and affiliates provide customers with a more transparent and balanced segregation of costs."



Don't miss the boat...

The next issue of **CARIBBEAN MARITIME** in January 2010, will focus on **THE YEAR AHEAD**. Articles will look at the wharf companies; terminals and support services in Caribbean shipping as well as the work of the Caribbean Shipping Association in assisting development.

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Women still an untapped resource for the shipping industry

For centuries, shipping has excluded 50 per cent of the population from its labour force

“Another way of thinking about this relates to both numbers and quality. Thus, if you wish to widen the basis of any recruitment you need to deepen the pool of talents that is available. That, surely, is common sense” (Michael Grey, 2008).

Over 90 per cent of world trade involves ships. Without shipping, the import and export of goods on the scale necessary for modern world trade would not be possible. There are about 50,000 merchant ships trading internationally, transport-

merchant ships generates an estimated annual income of over US\$380 billion in freight rates, representing about five per cent of the total global economy. From this equation, women have long been excluded.

Status

In the past, women’s status in society and their participation in economic activities were strongly influenced by religious and traditional social issues. Likewise, lower enrolment of girls in technical schools and universities probably stems from these socio-cultural issues. In the past, the shipping industry offered a way out of poverty

changing as the shipping industry is now a career seeking after the finest talent across gender boundaries.

There is no intrinsic reason why women should not participate in and benefit from employment within the shipping industry. The relevance of sea experience to many shore-based jobs means that the resource of women with appropriate skills is limited and will continue to act as a long-term constraint on the representation of women in the maritime sector as a whole. Also, the perception that seafaring is a man’s job can lead to lack of training and work experience opportunities for women. Even today, this is still a reality as many shipping lines are still slow to accept women into the technical areas of shipping employment.

Gender stereotyping

Just as there are more women who have been led into the fashion industry or primary school teaching because of ‘custom and practice’, it is gender stereotyping which tends to decree that shipping is ‘a man’s world’. It is this view that must be confronted. The obstacles to this are several, and notably



By Fritz Pinnock

There is no intrinsic reason why women should not participate in and benefit from employment within the shipping industry

ing every conceivable kind of cargo. The world fleet is registered in over 150 nations and manned by over a million seafarers of virtually every nationality. Ships are technically sophisticated, high-value assets and the operation of

for many workers as employment in the industry provided access to foreign currency and a regular salary with a direct impact on the economic viability of seafarers and their extended families. However, this has long been

so in an international context, where there are cultural, traditional and even historical issues to be overcome if women are to play a full part in maritime industries.

To break the cycle, adequate training has a critical role to play in the integration of women into all spheres of professional life including shipping. There must be an emphasis on women gaining access to all levels of training. At the Caribbean Maritime Institute, for example, in 2009 a female cadet came top out of a class of 110. Yet women made up only 10 per cent of that class.

Despite the troubled economic waters of recent times, employment in the shipping industry is becoming wide open. Times have changed. Today, more women are getting on board. Now, women

are just as likely to be found swabbing decks or servicing the mammoth steam turbines below.

Integration

Today, the integration of women into all levels of development has gained ground within the United Nations (see goal 3 of the UN Millennium Development Goals.) In 1988, for example, the International Maritime Organisation published its first Strategy for the Integration of Women in the Maritime Sector. This policy structure identified access to training and employment for women as priority objectives. Also, the IMO's global programme was to integrate

women into mainstream activities. It addressed issues such as: promoting the participation of women in maritime training, short-term consultancies, regional seminars, fellowship programmes for women and in-house gender training.

Industry studies suggest that the technological revolution in the maritime sector is calling for a highly trained workforce, but that there will be an estimated shortfall of some 50,000 officers in 2018. Female seafarers are an underutilised and underdeveloped resource that could provide part of the solution to the problem of crewing the world merchant fleet. However, it is clear

that to achieve this there is a need for changes in attitude towards employing women as seafarers; recruitment of women in the shipping sector generally; and more training opportunities for women.

Culture prohibited women

The maritime industry has not been an attractive career path for women. It was one of the most male-dominated careers that one could find. In the past, jobs in shipping involved a lot of physical strength. Culture prohibited women from participating at operational level. The biggest issue of all was that of social acceptability. Thirty or 40 years ago it was not

acceptable for women to serve alongside men in such an isolated environment. There were some persuasive folk myths, too, such as the idea that a woman on a ship would bring bad luck. It is not surprising that there are no historical role models for women in maritime roles in a professional capacity.

Technology has changed the boundaries of our lives and what used to be limitations are now mere challenges. Women have a lot more freedom, with access to areas that were previously prohibited; but the introduction of women into this very traditional environment has been a slow and sometimes difficult process. 

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CSA - A FORUM FOR CONVERGENCE OF DIVERSE EXPERIENCES AND METHODS

- parting words from the Group A Chairman

By Robert Foster

I have spent the last three years of my life working as chairman of the largest group of members in the Caribbean Shipping Association (CSA). Elected for three consecutive terms to represent the Agents and Private Stevedores group at the Association's General Council, I have had the rare privilege of participating in, understanding and contributing to the work and development of what must be one of the greatest membership organisations in the western hemisphere.

The CSA is, in many respects, unique. It is one of the few organisations I know of that brings both public sector organisations and private-sector interests into one harmonious body, working side by side to promote

development. I have hardly missed a CSA meeting in the past 11 years and each has been a new and energising experience for me. It is against this background, on the occasion of completing the three years on General Council that the Association's constitution allows, that I write my parting thoughts, my vision if you like, for the CSA.

RESPECTED

Over the past 39 years, the CSA has developed and evolved to become the much respected voice of maritime transport in and for the region of the Caribbean and Latin America. The Association includes in its membership countries from the four main language groups of the Caribbean: English, Spanish, French and Dutch. Few organisations in the Caribbean bring together the

ex-colonies of four European empires.

In this regard, the CSA is able to bring a new dimension to business growth and development across the Caribbean Sea. By bringing all the regional cultures together, the Association has provided a forum for a convergence of diverse experiences and methods. The CSA allows the cross-fertilisation of ideas between shipping lines, agents, ports and suppliers who have travelled different historical paths

WHAT WAS ADEQUATE A FEW SHORT YEARS AGO MAY NOT BE ADEQUATE TOMORROW

to arrive at the 21st century. By bringing these diverse experiences and business traditions together, the CSA has contributed more than most organisations to making

the Caribbean and Latin American region a cohesive force. Otherwise, were it not for organisations such as the CSA, the Caribbean would be nothing more than a sea of disconnected weak states.

NOT BY CHANCE

This did not happen by chance. The CSA did not become a binding force for regionalism by simply being in existence. If this were so, its membership would not have expanded so rapidly in less than four decades.

People in the shipping business do not become members of the CSA simply because a CSA exists. They do so because they perceive that there is value to their

membership and that their business operations will benefit from their being a part of this forum. They become members because the CSA has credibility. They do not become members because we have conferences or because we put on training courses. They can attend these events without having to pay membership dues. Our membership has grown exponentially because

the CSA has developed credibility in the Caribbean, Latin America and the world.

RELEVANT

In order to ensure that the Association remains relevant and valuable, its leadership held a two-day retreat in March 2008 in Miami, Florida. Out of this, a document detailing a strategy for the 'Way Forward' was produced. This is an update of the guidelines previously adopted in August 2003 and is effectively a blueprint for the continued development of the Association. This document, if updated and kept as central to the policy formulation function of General Council,

will ensure that the Association remains on a trajectory for growth and development. President Fernando Rivera deserves kudos for taking the initiative in hosting the

but sooner or later our offspring's development will be stunted and it will not realise its true potential if it remains in the house of its parents. The changing dynamics of

NEW THINKING, EVEN REVOLUTIONARY APPROACHES, NEED TO BE EMPLOYED TO TAKE THE CSA TO THE NEXT LEVEL

retreat in Miami and in re-energising the 'Way Forward' document. Future presidents may be well advised to continue this with this review exercise.

THE 'WAY FORWARD'

The 'Way Forward' document indicates that the time is now ripe for the Association, ever appreciative of the hospitality provided by our friends at the Shipping Association of Jamaica (SAJ), to seek a home of its own.

At present, the Association occupies quarters generously provided by the SAJ in its building. To be sure, the SAJ fathered the CSA,

the membership and the growing international stature of the organisation dictate a new approach. What was relevant, say, five years ago is no longer relevant today. What was adequate a few short years ago may not be adequate tomorrow.

REVENUE

The revenues of the CSA are generated mainly from membership dues, conferences and training seminars. This structure of revenue generation has to be revisited in order to adequately fund a Secretariat able to take the Association through this 21st century. New thinking, even revolutionary approaches, need to be employed to take the CSA to the next level. The CSA can make a much greater contribution to the growth, expansion and consolidation of regional maritime industries, but this must begin with an organisational capability way beyond what is currently in place. In this way, it will be able to expand its membership to include interests from many more Central American countries.

The Caribbean is arguably the crossroads for world trade thanks to the geography of the hemisphere, the presence of one of the largest markets on the planet



and the Panama Canal, which is now undergoing a major expansion. The CSA has a greater role to play than it currently does and the Association needs to get its props together.

WEBSITE

Opportunities exist as well for revenue to be generated from tools we have already established: the CSA's website (www.caribeanshipping.org) and our main publication, **Caribbean Maritime**. The website was the CSA's first excursion into cyberspace. When this bold step was made about five years ago, the CSA's website was a leader among websites. Most other organisations had a website with three or four web pages. The CSA's website started out with an impressive volume of information about the organisation and about news and developments in shipping across the entire region. With two news services – CSA News, generated from in-house, and Breaking News,

is a significant point. It means that the CSA already has a platform for expanding business news coverage across the region. Conceivably, **Caribbean Maritime** can expand to include information and material relevant to the users of shipping and maritime services, including exporters and importers and those providing a myriad services to the shipping industry. Already, **Caribbean Maritime** is in demand from learning institutions, business organisations and government ministries throughout our membership and the world beyond this hemisphere.

BENEFITS

In the short term, one way of attracting wider membership is to create, expand and promote members' benefits. For starters, these may include the use of simultaneous translation facilities at our conferences and the offer

ing and the 'well' must be replenished. But where is the talent? The needs of the industry, whether port operator, ship's agency, liner operator, NVOCC or supplier are very diverse, including finance, international law and engineering, to name a few. The onus, therefore, is on the Association and its

may be required may not be easily transferable. The CSA will need to ensure that the content of syllabuses matches the needs of our industry so that our members can continue to offer the best service in the countries where they operate.

The CSA will commence its 40th year during the 40th annual general meeting which the SAJ has offered to host in October 2010. How appropriate this will be, for it was Jamaica, along with some other interested Caribbean states, that started the process which led to the formation of Association. And it is the SAJ that has kindly granted the space we have had for the humble offices that have housed our Secretariat over our history; the offices that continue to play a vital supporting role for the Association today. 

CARIBBEAN MARITIME IS IN DEMAND FROM LEARNING INSTITUTIONS, BUSINESS ORGANISATIONS AND GOVERNMENT MINISTRIES THROUGHOUT OUR MEMBERSHIP AND THE WORLD BEYOND THIS HEMISPHERE

generated by one of the oldest news organisations in the shipping industry, the British-based Fairplay – the CSA website brought people from all over the world into direct contact with the organisation.

Caribbean Maritime is currently the Caribbean's only regularly published business magazine, to the best of my knowledge. This

of discounts on air travel and hotels. We have already instituted a policy for travel insurance for all registered delegates at our conferences and Early Bird discounts for early registration.

The longer term offers other challenges. In most of our smaller member states, companies involved in the maritime business are family owned. The elders are retir-

membership to develop a policy document which can inform heads of the tertiary intuitions and curriculum planners about the job skills the industry will require in the next five to 10 years.

The skills that a developing maritime industry will require to meet the challenges of the future will not be there automatically when they are needed. And such skills as

Monica Silvera – a scholarship in her honour



The Caribbean Shipping Association's first female chief executive officer was Monica Silvera, who died in 2002. Now the CSA celebrates her life and contribution to the development of the Association by naming a scholarship in her honour.

If Mrs Silvera had the memory of an elephant, she had the eye of an eagle

Monica Silvera was to the CSA what sunlight is to a garden. Those who knew Monica would not mull over that statement but would consider it, if anything, an understatement.

ENERGY

Mrs Silvera brought warmth and energy to the Secretariat of CSA conferences. She had a warm, welcoming persona and an infectious laugh and she remembered everybody's name. More than that, she remembered where everyone was from. And if they had brought their family to a previous CSA conference, she would remember the name of their spouse and the names of their children. She was gifted in that regard and CSA members loved her for it. She made everyone feel special – perhaps because she felt that every-

one was special.

At CSA conferences, when weary delegates arrived at the Secretariat, sometimes after travelling great distances, Monica, as she was affectionately called, would welcome each with a warm smile, address each by name and was able to discuss their

journey simply because she committed to memory how each delegate would be travelling.

This was just one of the many aspects of the personality of this great woman whom we admired and respected. For, not only did she make people feel special, she helped to make them feel part of the CSA. Monica gave CSA members a sense of belonging. She made those coming to a CSA event for the first time feel that they 'belonged'. And she made older members feel loved. It certainly made her a very special person.

APPOINTMENT

Monica's appointment as the CSA's first female executive vice president was, as they say, a 'no-brainer'. She knew the CSA and was a binding force. She had served the

Association for many years as secretary to the previous executive vice president and then as corporate secretary to the Association. She knew every decision that the General Council had taken as she meticulously went through the minutes of the various committees.

BACKGROUND

If Mrs Silvera had the memory of an elephant, she had the eye of an eagle. She was a proof reader's proof reader. Her background in one of Jamaica's leading law firms made her a stickler for detail and she let very little slip her attention. She was therefore able to effectively handle the logistical details of planning international conferences.

CSA past president G. Ainsley Morris said: "She will be surely missed, not only because of her fantastic personality but more so because of her ability to get things

done properly and expeditiously the first time around." And past president Ludlow Stewart summed up Monica's

attitude to her work: "She undertook her responsibilities with diligence and determination." As such, she became a CSA icon, he said. Monica worked hard, completed her assignments accurately and on time and then she partied heartily. She was a classy lady. Impeccably attired, elegantly formal or fashionably casual, she embodied the spirit of the CSA in her work and in her humanity.

ELEGANT

Bruno Rossovich, a CSA member from Martinique, said: "We always remember Monica as a beautiful, powerful and elegant great lady. She will stay in our minds as the great spirit of the CSA and we always remember her sunny smile."

Monica died in 2002 during the presidency of

Monica's appointment as the CSA's first female executive vice president was, as they say, a 'no-brainer'

Capt Rawle Baddaloo, six months after being appointed the CSA's first female chief executive officer. 



SHOULD YOU CASH IN ON THE PROPELLER REVOLUTION?

New propellers can reduce fuel consumption by up to 15 per cent

Propellers have been part of marine propulsion for over 250 years – long enough, it would seem, for designers to have figured out every possible way to improve them. Yet marine engineers say propellers are actually much better today than they were even a few years ago.

Over the past 10 years, advances in computer modelling have enabled engineers to design propellers that are much more efficient than even the best propellers manufactured in the 1970s and 1980s. In fact, at Wärtsilä, the world's leading manufacturer of commercial ship propellers, marine engineers have found that substituting a new propeller for an old one may reduce a ship's fuel consumption by as much as 15 per cent.

The new designs are stronger, too, engineers say. Until the development of modern hydrodynamic software, the stresses on complicated high-skew propellers could not be reliably computed.

Now, better software has made it possible to design blades for longer life and simpler servicing.

"Now we design propellers in such a way that the stresses are centralised in the middle of a blade where the chances of cracks are less likely," says Kees de Grijs, area sales support manager for North America.

A NEW PROCESS

Propeller innovation is nothing new for Wärtsilä. The Lips company, now part of Wärtsilä, designed the first controllable pitch propellers back in 1903. However, engineers say there has been a dramatic spurt of improvement in recent years.

"The technology has advanced so much that now we're able to offer better performance and better fuel economy," says Jose Vargas, marine and industrial account manager for Wärtsilä Caribbean.

Beyond a better general understanding of propeller hydrodynamics, the

capacity of computers to crunch huge volumes of data has helped Wärtsilä tailor more efficient designs to the needs of each customer. The reason is that propellers are not sold in standard sizes, like tyres. Instead, they must be cast to meet the requirements of each engine and each ship. Typically, Wärtsilä, which has manufactured propellers as large as 11 metres in diameter, takes extremely detailed measurements of the vessel and the original propeller before recommending an adjustment, casting a new propeller or adding a nozzle.

First, Wärtsilä engineers use analytical software to make a quick estimate of the overall efficiency of a propulsion system and identify opportunities for improvement. Over time, for example, engines start to run 'heavy', meaning that the engine needs to work harder. This can lead to overheating and overloading of the engine, which can drastically reduce the engine's life. Sometimes this means that a measure as simple



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as modifying the propeller's pitch can go a long way towards improving the interaction between the propeller and the engine.

Next, after discussing the options with the client, the engineers examine the existing propeller more closely and feed the data into another programme. Engineers say they examine the existing stresses, but they also use the same software to forecast where stresses and erosion are likely to develop in the future.

At that point, the engineers brief the client on how much money they could save on each of a number of options. How accurate is the estimate? "Pretty much on the money," says Vargas. "Once we have all the information, a good predication can be made."

Finally, whether what's needed is a modified or an entirely new propeller, engineers use their in-house design software to make a detailed, optimal propeller design, according to de Grijjs.

"We really work out the profiles of the blades, mechanical properties, and mechanical stresses," he explains.

WHAT IS OPTIMAL? IT DEPENDS

When it comes to propellers, the optimum, like beauty, is in the eye of the beholder. Typically, the customer will need to make some trade-offs, says de Grijjs, such as a choice between energy efficiency and limited vibration. The best choice for a cargo ship, for example, might be a design that maximises fuel efficiency, while a fishing trawler could

be better off with a low-noise propeller that won't scare away the catch.

OTHER ADVANCES

Better modelling has led to other important advances, such as high-efficiency rudders, which Wärtsilä started to manufacture in the 1990s. The modelling technology has also led to creative ways of thinking about the propulsion challenge. For example, Wärtsilä and Becker Marine Systems, the leading rudder manufacturer, have joined forces to develop a new rudder/propeller system that combines an energy-saving, hydrodynamic rudder with an advanced propeller in a single unit that looks a little like a gigantic version of an out-board motor.

The Energopac system, as the package is called, improves manoeuvrability, lowers rudder drag and permits tighter

ing a propeller with a larger diameter and a lower rate of revolution, installing a more efficient rudder. Finally, up to 15 per cent fuel improvement can be gained by converting an open propeller to a ducted 'nozzle' design of the Wärtsilä HR type, according to Mike Howarth-Coyne, regional sales manager of the Americas.

Making matters more complicated still is the fact that not all designs are cost-effective at every speed. For a coaster or multipurpose vessel, for instance, a ducted propeller is 15 per cent more efficient than a bare propeller at 10 knots but only four per cent more efficient at 14 knots and at speeds of more than 16.4 knots actually becomes less efficient.

Less invasive repair programmes can also yield big savings. For instance, polishing and reprofiling blades can by

THE EASIEST AND LEAST EXPENSIVE OPTION IS BLADE-POLISHING AND EDGE DAMAGE REPAIR

steering angles. Its key innovation is twisting the leading edge of the rudder slightly to align more closely with the propeller's slipstream, gives the rudder better water flow.

More than 30 ships have now been equipped with this advanced system, according to Wärtsilä, and virtually all of them have saved fuel. A number of chemical tankers have reported cost savings of five per cent at 17 knots, while another group of general cargo ships has gained four per cent even at 23 knots.

MAKING THE RIGHT CHOICE

With so many different options, experts warn that it is not always easy to decide which technology makes the most sense in terms of return on investment.

The easiest and least expensive option is blade-polishing and edge damage repair. Wärtsilä crews can do this in virtually any dry dock, even underwater, and shave up to five per cent off the total fuel bill. Ten per cent improvement can be achieved by install-

itself yield significant savings – and in a 25-year-old ship may well be a more cost-effective choice than replacing the propeller altogether.

Ultimately, of course, the amount the owner should invest depends on the overall amount of the ship's fuel consumption. A trawler that typically cruises at 10 knots uses only 20 per cent of the fuel consumed by a high-speed ferry cruising at 24 knots. All things being equal, this means that the payback period of a propulsion investment would be five times longer for the trawler. 



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Stanley K. Chapman – stalwart of the Barbados shipping sector

The shipping community of Barbados is mourning the loss of one of its most prominent members, Stanley Chapman, after a lifetime of work that helped laid the foundations of a modern shipping industry in his homeland.

Stanley Chapman, who died on 12 April at the Queen Elizabeth Hospital after a short illness, had been honoured by the Shipping Association of Barbados in 2005 as a stalwart of the country's maritime industry.

Barbados

He was born in August 1923 in Christ Church, Barbados, the third of four sons of Norman and Louise Chapman. Educated at the Boys' Foundation School, he secured junior and senior Oxford and Cambridge certificates (high school qualifications) and won a prize for mathematics. Rather than pursue higher studies,

as a director and vice chairman. His appointment as a director at Dacostas at the age of 33 made him the youngest director in the group at the time.

Industry was his passion

Stan married Eleanor Skinner in April 1951. The marriage produced two daughters and a son. Stan was a devoted family man, but shipping was his passion. His wife and children can all testify to the countless nights he – sometimes accompanied by them – spent going out on lighters to service ships. This, of course, was before the deepwater harbour was built. Stan was always solving 'after-hours problems' such as entertaining ship's captains. When the Bridgetown deepwater harbour was being built, he made sure that every evening he went to see what progress had been made.

Stan was one of a team of three



He was also a stalwart in the development of the shipping association. Indeed, an inscription presented to him by the Barbados association, on its 25th anniversary, reads: "To SKC, whose vision it was to form the association as a representative body, to better serve the maritime industry in Barbados." This was just one of many awards he received from the industry.

Well-loved

An affable and well-loved individual – some described him as a 'people person' – Stan was a founding member of the Challenor School for Mentally Retarded Children. He was also a founding member of the Rotary Club in Barbados. He was Japan's Honorary Consul in Barbados for 15 years and was decorated by the Emperor of Japan for his services. He received the Queen's Silver Jubilee medal for social work and his native Barbados subsequently honoured him with a Gold Crown of Merit for his contribution to business and for his social work in the island. 

The opening of the new Barbados port was one of Stanley Chapman's proudest moments

the rather bright youngster went straight to work, as did many young men of that pre-war era.

Clark

Stan, or 'Speed' as he was affectionately known, began his working life as a shipping clerk at Dacostas Ltd. In a career spanning four decades, characterised by hard work and dedication to duty, he earned successive promotion through the ranks to retire as chairman of Dacosta & Musson, then the largest subsidiary of the Barbados Shipping & Trading Group. He also served the group

tasked with organising the feasibility study for the harbour project and selecting the right model for Barbados. In this regard, just three days after his son was born, he was required to travel all over the UK and Europe for six weeks in 1958 investigating and observing the best solutions and practices. He then helped to oversee the construction of the new port.

The opening of the new Barbados port was one of Stanley Chapman's proudest moments. He subsequently served as chairman of Port Contractors Ltd for a number of years.

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State-of-the-art boarding bridges for Cozumel ferry terminal

TWO state-of-the-art passenger boarding bridges (PBBs) are to be installed at the modernised ferry terminal of San Miguel on the Mexican island of Cozumel.

The Port Authority of Quintana Roo recently signed a contract with the designer and manufacturer TEAM to supply two PBBs of the Pegasus range. Delivery is scheduled for early 2010. The contract includes an option for a further set of PBBs to be installed in late 2010.

Cozumel, 20 km off the Yucatan peninsula, is Mexico's largest Caribbean island. The passenger ferry service between Cozumel and Playa

began an upgrading of the ferry facility, which is next to the Punta Langosta cruise ship pier in downtown San Miguel de Cozumel. The aim is to provide more comfort, safety and security for passengers. The project includes the construction of a new terminal building with a wide range of services and a broadening of the passenger access pier from 6 to 11 metres. The PBBs of the Pegasus range will consist of a short tunnel section and a sophisticated cabin and docking ramp. The PBBs have an electro-mechanical elevation system and are designed to move on rails along the whole pier. Safety and secu-

TEAM's passenger boarding bridges are equipped with what the company describes as 'a uniquely integrated hydraulic telescopic docking ramp'

del Carmen on the peninsula is the primary gateway to both destinations. In 2007 nearly 1.4 million passengers took the 45-minute ride to or from Cozumel.

In May 2008 the Port Authority of Quintana Roo

rity will be enhanced element as passengers will embark and disembark via the PBBs to the first level of the new terminal building.

When these two PBBs are installed and in operation, the Terminal Marítima at



New ferry terminal building and ferries in Cozumel

San Miguel de Cozumel will be the first ferry terminal in Mexico and the Caribbean with modern passenger access systems.

TEAM is hardly a newcomer to the Caribbean. The company has previously installed PBBs in the Caribbean: in 2003 at the Carnival Cruise Terminal in San Juan, Puerto Rico; and in 2007 at the Sans Souci Cruise Terminal in Santo Domingo, Dominican Republic.

Safety and security

TEAM's passenger boarding bridges are equipped with what the company describes as "a uniquely integrated hydraulic telescopic dock-

ing ramp". When attached to the side of a ferry, it automatically follows the vessel's movements and will immediately undock in an emergency. The company says its PBBs comply with the latest international safety and security standards. 

TEAM is an engineering and services company with offices in Barcelona, Madrid and Miami. Founded in 1991, it is a leader in the design, manufacture, installation and maintenance of sophisticated passenger boarding bridges for cruise and ferry terminals.

FINDING THE RIGHT IT SOLUTIONS



By Frances A. Yeo

Searching for appropriate information technology (IT) solutions for a small port operation can be challenging. There is a plethora of solutions on the market and you must ensure not only that the needs of the organisation are met but also that the solution is affordable.

Before doing the research, it is always good to start with the requirements of your specific port and then work to find a product that meets these requirements and enhances the delivery of port services.

Within the membership of the Caribbean Shipping Association, ports are regarded as 'principal' ports and 'other' ports. This is by no means a guide to the size of the port. Indeed, Manzanillo International Terminal, the Port of Kingston and the

Port of Cartagena can be ranked among the largest in the region for cargo traffic. However, on the cruise side of the business, if we were to judge by vessel calls, passengers and support services, many other ports could be included.

your operation. In a marina operation, for example, key areas that could benefit from automation are:

- Vacancy searching – comparable to an aspect of yard management in container ports

flows of shipping lines, government agencies and clients. Essential in any port operation would be solutions that provide more effective yard and inventory management. Both of these components can be supported by affordable hand-held solutions.

THE RIGHT IT SOLUTION CAN ASSIST GREATLY IN EFFICIENCY, CONTROLLING COSTS, MEASURING PRODUCTIVITY AND IMPROVING THE RELATIONSHIP WITH CUSTOMERS

Typically, the larger ports have already achieved an acceptable level of automation, having implemented major terminal operating systems such as Cosmos, Navis and Tideworks. When we look at the smaller operations, however, the traditional manual systems still exist, although software has been introduced to handle the back office accounting and other administrative functions.

MARINA OPERATION

The right IT solution can assist greatly in efficiency, controlling costs, measuring productivity and improving the relationship with customers. It is vital, however, to analyse the requirements of

- Reservations, check-in and check-out – maximising the use of space in the marina
- Deposits and payments – critical to the control of revenue
- Security – essential in today's operations.

In container ports, there is usually a need to automate both front and back office in order to reduce administrative costs. IT solutions can also help in the processing of manifests, streamlining invoices and receipts and providing checks and balances for audit purposes. There is also a growing trend towards electronic data interfaces (EDI) for the information

Establishing the requirements is the first and most important step. This exercise necessitates a review of business processes and collaboration of stakeholders. The end result puts the decision makers in a solid position to review and determine the way forward and the most appropriate solution. 

Frances A. Yeo is executive director of Port Computer Services Ltd.

Enjoy your cruise – but don't forget to read the small print

There are important legal considerations, both personal and global, arising from cruise ships and their operations, says Milton J. Samuda

For those of us who cannot afford our own luxury yacht, the affordable cruise with fabulous state rooms and 'endless' or 'nuff' luxury, is the next best thing.

The cruise industry is a vital partner of Caribbean tourism. Millions of visitors experience a slice of the exotic Caribbean by 'dropping in' from their floating resorts. How many of those cruise ship vacationers, filled with the excitement and anticipation of the imminent, unforgettable getaway, will carefully read each line of the documentation with which they are presented when planning and paying for their dream cruise?

How many pay attention to the details of their tickets

How many give a thought to the global environmental implications of this huge behemoth which, for them, represents an island for making special memories?

How many can be expected to consider the impact on mother sea and sister air when cruise ships with a capacity of up to 5,000 passengers power their way through the scenic routes of the Caribbean?

Very personal considerations

Cruise ships are fully equipped resorts at sea with an atmosphere of secure and entertaining 'escape'. However, like all other vacation spots, cruise ships have their risks. These range from food poisoning and personal injury

or adversarial litigation. What they must remember that, as with any land-based vacation, there are risks to be avoided and, if not, for which they may be compensated depending on the legal culpability of the cruise ship.

To begin with, as at any other resort, passengers must be reasonably careful. They must follow the rules (as with a pool, gym or Jacuzzi); employ thoughtful security (securing valuables or using safes); and observe the dietary do's and don'ts as they would normally. Once the passenger does not place himself or his property at risk or does not act recklessly or negligently as to his personal safety, the general duty of the cruise ship for his safe and enjoyable vacation

or adversarial litigation. What law governs the contract between the cruise ship and the passenger, which jurisdiction hosts the litigation that may take place, and who is the competent party, are often determined by the conditions of the passenger's ticket and other documentation in the light of judicial interpretation. How much compensation is payable, the time period within which a claim must be notified to the cruise ship or litigated upon, is similarly a matter of legal consideration and interpretation. The duty of care and standard of care applicable to the cruise ship and its crew are determined by law. The safety and other standards to which the cruise ship must adhere – on pain of liability – are imposed by maritime law underpinned by applicable treaty arrangements. Importantly, where the law of the flag ends and the law of the territorial water begins, and what obtains in international waters, are all questions that fall to be determined within the consideration of law.

Passengers, take note.

Global considerations

Many of us forget that cruise ships, like land-based resorts, consume energy and produce

Cruise ships are fully equipped resorts at sea with an atmosphere of secure and entertaining 'escape'. However, like all other vacation spots, cruise ships have their risks

and any conditions, disclaimers or restrictions that may apply?

How many consider the implications of stepping on to what is a floating piece of another country, as may be determined by maritime law?

to a total failure of consideration, when a passenger feels robbed of the vacation experience that was promised and contracted for.

While the minds of would-be passengers will

experience is unaffected by his actions.

The potential liability of the cruise ship is a matter of law and falls to be determined as between the parties in negotiated settlement

waste. The impact on the environment is damaging and real. Cruise ships, like aeroplanes, emit carbon dioxide as they consume energy to fuel the varied activities

impact of pollution at the sea. The International Maritime Organisation and other international imposed standards provide some framework within which the cruise

lawmakers and foreign ministers around the world.

To be sure, the cruise industry itself has progressed in its handling of these issues. It has developed new

scientific advances in the reduction of emissions and the treatment of waste.

Conclusion

As with so many of the routine and not-so-routine things in our lives, it is the law which underpins and determines the nature of the relationships and the respective rights, duties and liabilities of parties. Think on this when next you step aboard a cruise ship, pretending that it is your own private yacht! 

Milton Samuda is managing partner of the Jamaican-based law firm Samuda & Johnson.

The impact on the environment is damaging and real. Cruise ships, like aeroplanes, emit carbon dioxide as they consume energy

which must be on menu for the total comfort and enjoyment of passengers. Wonderful meals, heated pools, luxurious spas, fresh laundry and clean rooms all involve the consumption of energy. In addition, the accumulation of waste and the generation of waste water present challenges to minimising the

industry must operate, but there is more to be done to safeguard the environment while allowing this critical industry not just to survive, but to flourish. The municipal and international legal frameworks governing these matters continue to evolve and the cruise industry can expect greater intrusion by

practices and procedures and engaged new machinery and equipment to minimise the global environmental impact of its operations. From cutting-edge engines to ultra-modern waste water treatment systems, the mega cruise ships of the modern era employ still-evolving best practices and still-emerging

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