

No. 16 | MAY - SEPTEMBER 2012

CARIBBEAN MARITIME

PORTS & TERMINALS

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CARIBBEAN MARITIME

CELEBRATING FIVE YEARS OF SERVICE
TO REGIONAL SHIPPING

PANAMA CANAL

OBSERVATIONS AND EXPECTATIONS
OF AN EXPANDED CANAL

CSA PORT AWARDS

PROMOTING DEVELOPMENT FOR 25 YEARS



2007-2012
**CARIBBEAN
MARITIME**
5TH ANNIVERSARY
EDITION

JACKSONVILLE

*An ideal hub
for distribution*



MARITIME BEACON IN THE WESTERN HEMISPHERE

PORT OF KINGSTON – JAMAICA

“ Over the past thirty years, the Port of Kingston has developed into an important player in the international shipping industry and is now the leading transshipment hub port in the region. Operations at the Kingston Container Terminal highlight a well-trained and motivated workforce, in an environment of stable industrial relations and leading-edge technology.
The Port of Kingston is strategically located on both the north-south and east-west axis through the Caribbean and just 32 miles off the main trading route to and from the Panama Canal. ”

KIMBERLEY STIFF PORT AUTHORITY OF JAMAICA



CARIBBEAN MARITIME

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CARIBBEAN
MARITIME
5TH ANNIVERSARY
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An ideal hub for distribution

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Views and opinions expressed by writers in this publication are their own and published purely for information and discussion, in the context of freedom of speech as guaranteed by our democracies. They do not necessarily represent the views and opinions of the Caribbean Shipping Association. - *The Editor.*



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The official journal of the
Caribbean Shipping Association



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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Editorial

MIXED SIGNALS AS CARIBBEAN MARITIME CELEBRATES 5TH ANNIVERSARY

Time seems to drag when times are difficult. To the contrary, it seems to slip quickly by when you are having fun. These erroneous perceptions are familiar to most. As we all know, time goes by at the same measured pace, minute by minute, day by day. However after five to six years of a global recession, the shipping industry may be excused for feeling that it has been an eternity since buoyancy and growth were the norm.

As we go to press, celebrating the fifth anniversary of this publication, we note the continuing flow of mixed signals as we search for signs that suggest a return to life and balance sheets as we once knew them. And, like the proverbial drowning man, we instinctively grab at anything resembling hope that is floated.

The latest Shipping Confidence Survey from international accountant and shipping adviser Moore Stephens stated that overall confidence levels in the shipping industry increased slightly in the three months ended February 2012, to reach their highest level since May 2011. This was the third successive quarter in which there was a small improvement in confidence.

PREDICTIONS

That aside, container and bulk shipping lines are still feeling the pinch, on both cheeks – excess capacity and weak freight rates – while being hammered by rising fuel costs. In some areas, rates have reportedly begun to improve, if only marginally, but not many are taking bets that the trend will persist. As one analyst points out, fuel prices may fall as demand drops off, but its price is driven by so many unconnected factors that it would be insane to base any cost predictions on a decreasing oil price.

Meanwhile, production in China's factories fell for the third consecutive quarter between January and March, causing renewed fears for global shipping. Mixed signals indeed.

As we celebrate the fifth anniversary of **Caribbean Maritime**, with the theme Ports and Terminals, we look back over the past five years that this publication has served the regional shipping industry. The recession into which **Caribbean Maritime** emerged in 2007 is still with us; however, it appears that things are not getting much worse, even if a recovery is not happening as fast as we would like. The IMF now expects growth to accelerate this year as Europe exits a 'shallow recession' and is predicting growth in Europe and the USA in 2013. The Panama Canal Expansion project, featured extensively in this issue, is proceeding apace and there are many other positives including a slight but continuing improvement in the US job market. Indeed, there are more positive signs now than at any time during the past five years and there has been significant growth and expansion of the maritime industry in the Caribbean and Latin America, as documented in this publication.

Mixed signals there are, but the good now seems to be outweighing the bad.

Mike Jarrett

*Editor,
Caribbean Maritime*



Giving a voice to our shipping industry



The CSA meets on North American soil in May, courtesy of the Jacksonville Port Authority, for the annual convention of the shipping industry of the Caribbean and Latin America. The 11th annual Caribbean Shipping Executives Conference will bring into sharp focus the many issues and concerns with which we grapple at this time.

This conference has developed over time into an effective forum for dealing with nuts-and-bolts issues. The discussions are of a very high standard and the treatment of topics reflects the latest thinking. Developments, trends and shifts come under the microscope, making the Caribbean Shipping Executives Conference not only meaningful but immediately useful.

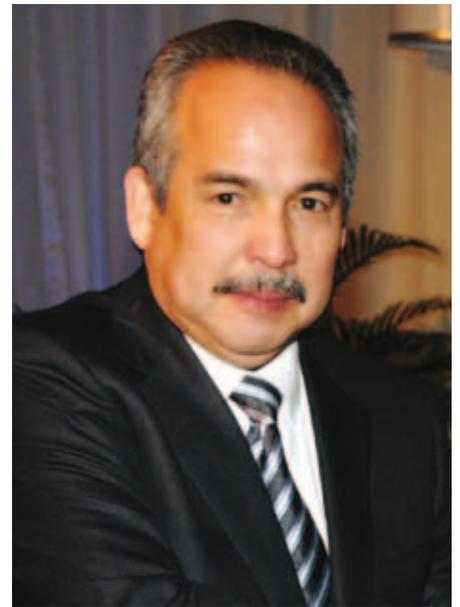
PROBLEM-SOLVING

Discussion sets the stage for problem-solving. And forums which facilitate discussion are therefore critically important in the search for solutions. Such are the forums of the CSA, whether they be our annual conferences, training seminars or this magazine, **Caribbean Maritime**.

SEARCH FOR SOLUTIONS

Celebrating its fifth anniversary, **Caribbean Maritime** has met expectations and in some instances has surpassed what was expected when it was established. The coverage of the magazine has extended across all the Americas and its high quality has been sustained. More than this, it has provided a forum for discussion of regional shipping at the leadership level. This makes **Caribbean Maritime** important in the search for solutions.

The CSA's effectiveness in sustaining a viable regional network of industry leaders



and in building a consensus around development issues, is supported and assisted by this magazine. Through its pages, the state and progress of the shipping industry of the Caribbean and Latin American region over the past five years have been tracked and monitored. It has given a voice to players in the industry. It has presented articles which teach and articles which stimulate management ideas. It has become a research tool for students and researchers. And, it is delivered free of charge to anyone who is interested.

This magazine is a development tool. It is a CSA gift to the regional and, indeed, global shipping industry.

Carlos Urriola

President,
Caribbean Shipping Association

“

The coverage of the magazine has extended across all the Americas and its high quality has been sustained

”

ADDING VALUE THROUGH TEAMWORK AND TECHNOLOGY



Celebrating 45 years of regional growth and excellence.

The Port of Point Lisas has worked very hard to be one of the key regional ports, servicing shipping lines of global reach, and using teamwork and technology to add value to each and every one of its stakeholders.

With its ideal location in the safety of the Gulf of Paria of Trinidad and Tobago, together with its best-in-class Terminal Operating System, productivity accolades, well trained employees and a renewed focus on innovation, the Port of Point Lisas continues to forge ahead as a Port that links the Region.



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<http://www.plipdeco.com>





Satisfied customers find Jacksonville ...

An ideal hub for distribution

With thousands of acres of new warehouse and distribution facilities joining the millions of square feet of such operations already in place, the Jacksonville area is poised to significantly enhance its position as a preferred logistics hub in the US Southeast.

"For our growing customer base, the ability to formulate a cost-saving strategy, leveraging different products of their supply chains, represents new efficiencies that fit today's economic demands," said Raul Alfonso, senior director, trade development and global marketing for JAXPORT. "Simply said, shippers can do more with less – and such rationalisation is setting a new shift to the pace of logistics around JAXPORT."



JAXPORT senior director for trade development and global marketing
Raul Alfonso

With access to more than 55 million consumers within an eight-hour drive, shippers can take advantage of Jacksonville's location at the crossroads of three interstate highways – I-95, I-10 and I-75 – to

get their goods quickly to market. More than 100 trucking and drayage firms operate in and around JAXPORT to take advantage of the city's highway system. In addition, importers and exporters shipping through Jacksonville enjoy services from Class I rail networks CSX and Norfolk Southern as well the regional rail line Florida East Coast Railway.

PARTNERS

Distribution points receive cargo from JAXPORT's three marine terminals, which enjoy worldwide carrier services and are capable of handling every type of general and project cargo. From breakbulk to containers to vehicles to bulk, JAXPORT and its maritime partners handled more than 8 million tons of cargo in 2011. With its unique ability to serve as a hub for inbound and outbound cargo and for distribution of goods throughout the US Southeast and beyond, it is little wonder that Jacksonville is developing a burgeoning reputation as 'America's Logistics Centre'.

"JAXPORT and Jacksonville are increasingly top of mind for shippers as word spreads of the efficiencies we offer," said JAXPORT chief executive Paul Anderson.

Leather goods leader Coach Inc has been sold on the advantages of Jacksonville since 1995, when the firm opened its original 300,000 sq ft distribution centre in Jacksonville. And the company's top logistics professional believes the area and its port offer still more benefits today.



JAXPORT chief executive
Paul Anderson

Jim Prior, Coach's divisional vice president for transportation and trade compliance, said Coach now had 850,000 sq ft of distribution facilities in Jacksonville, serving stores throughout the United States and



With access to more than 55 million consumers within an eight-hour drive, shippers can take advantage of Jacksonville's location

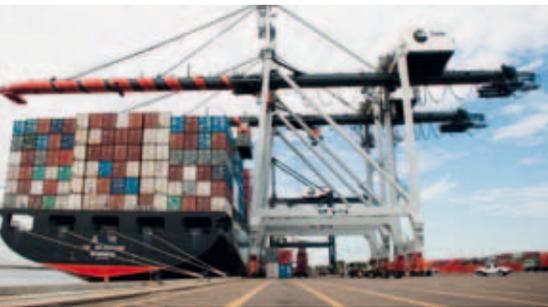


Canada. Mr. Prior pointed to the introduction in 2008 of MOL's Asian service into Jacksonville as a key development.

"We took advantage of the very first ship, and we've probably had containers on the service every week since," he said.

MOL's 158-acre TraPac Container Terminal is to soon be joined at JAXPORT's Dames Point Marine Terminal by another leading-edge container terminal to serve vessels of Hanjin Shipping Co Ltd and its alliance partners.

Mr. Prior said he was impressed by the "very easy out and in" access between Dames Point docks and Coach's distribution centre, about 15 to 20 minutes away, as well as by



excellent JAXPORT security, quick availability of containers at the port, and competitive trucking rates. Jacksonville gives Coach three-day delivery to stores in California with two-driver teams of truckload carriers.

FACILITIES

Michaels Stores Inc, North America's No 1 arts and crafts retailer, uses more than 500,000 sq ft of Jacksonville distribution facilities to serve its stores throughout the Southeast, as far north as the District of Columbia and west to Louisiana, according to Rich Markovich, Michaels' director of international logistics and compliance.

"We made the strategic move to consolidate operations into Jacksonville as the port has developed greater inbound capability from Asia," said Mr. Markovich. "A real point of strength is the workforce in the Jacksonville area – on top of the dynamics that make Jacksonville a very attractive place when it comes to domestic transportation."

Mike Bauer, North American logistics manager for UPM, the world's leading



We made the strategic move to consolidate operations into Jacksonville as the port has developed greater inbound capability from Asia



manufacturer of graphic paper products, cited favourable backhaul intermodal and trucking rates and rail options offered by CSX Transportation and Norfolk Southern Railway among attributes that make Jacksonville ideal for serving the Southeast, as well as more competitive for serving Midwest customers than mid-Atlantic ports.

UPM annually brings some 500,000 tons of graphic papers from Finland via Spliethoff vessels into Jacksonville's port and the distribution facilities of Jacksonville-based Seaonus.

"I think Seaonus and JAXPORT have been excellent partners with UPM," said Mr. Bauer. "We like to think we have a competitive advantage and that our supply chain is one of our best selling points."

Seaonus's vice president for business development and customer relations, Rick Sharp, said his firm, which operates about 330,000 sq ft of multi-temperature facilities and 720,000 sq ft of dry warehouse space in Jacksonville, was looking to leverage Jacksonville's advantages to link markets from Latin America to Europe with the US Midwest in addition to the Southeast.

Seaonus is partnering with CSX in an initiative to offer a 56-hour transit time between Jacksonville and the Chicago area. This year, Seaonus hopes to make this link via a distribution facility the company is building in Kingsbury, Indiana, about 40 miles south-east of Chicago.

In addition to bringing imports into the Midwest, this effort should facilitate outbound shipments of poultry, pork, beef and other commodities from the Midwest to Puerto Rico and Caribbean markets via Jacksonville's port.

JAXPORT served by 30-plus ocean carriers

JAXPORT facilities are served by over 30 shipping lines, combining to offer services throughout the Caribbean, including Puerto Rico, Central America, South America and Mexico as well as Asia, Australia, the Middle East, the Mediterranean, Europe and Africa.

Ocean carriers serving JAXPORT include:

Abou Merhi Lines
 Aliança Lines Inc
 American Roll-On Roll-Off Carrier (ARC)
 APL
 Atlantic Container Line (ACL)
 CMA CGM
 COSCO
 Crowley Liner Service
 CSAV
 Eukor
 Frontier Liner Services

Great American Lines (GALI)
 Grieg Star Shipping
 Gulf Africa Line
 Hamburg Süd N.A.
 Hanjin Shipping
 HMM
 Höegh Autoliners
 Horizon Lines
 K-Line
 Liberty Global
 Mediterranean Shipping (MSC)
 Mitsui OSK Lines
 MOL (America) Inc
 Nordana Line
 NYK Line (NA) Inc
 Sea Freight Line
 Sea Star Line
 Spliethoff
 Trailer Bridge
 Wallenius Wilhelmsen Lines
 Yang Ming

Carriers are also taking note of Jacksonville's cost-efficient logistical connections.

"JAXPORT has proven to be critical not only for exports but also import cargo, especially with our new direct five-day transit from Puerto Limon, Costa Rica," said David G. Ross, executive vice president of Miami-based SeaFreight Agencies (USA) Inc. "This service places imported fruit at the doorstep of many of the major distribution centres in the Southeast."

BENEFITING

Indicative of the companies that are benefiting from Jacksonville's logistics eminence is Bridgestone Americas Tire Operations LLC, based in Nashville, Tennessee, which in 2008 opened a 1 million sq ft distribution facility at Cecil Commerce Centre.

Robert Gardenhire, Bridgestone's general manager of warehousing, said the facility was a hub for tyre imports from Latin America and, potentially, Asia. He was impressed by the business-friendly approach of professionals in Northeast Florida.

"The people in the region, whether at the port or in the Jacksonville business community, continue to be user-friendly, and we do appreciate that," said Mr. Gardenhire. "They are supportive of our presence and are good business partners."

JAXPORT executive vice president Roy Schleicher said: "The distribution segment of the industry is forging forward in Jacksonville because of our location, a growing population and the new services that we offer to our customers. Our new east-west trade capabilities can connect very nicely with our north-south trade and establish new relationships and partnerships for the future. The abundance of third-party logistics companies and warehouse capacity in this area truly makes Jacksonville America's Logistics Centre. 



JAXPORT facilities handle every type of cargo

JAXPORT's three cargo terminals handle every type of general and project cargo. From bulk to containers to vehicles to breakbulk, JAXPORT moved more than 8 million tons of cargo and over 520,000 vehicles in 2011.

Jacksonville now ranks among the top container ports in the United States and is one of the country's busiest vehicle handling ports.

At its 173-acre Talleyrand terminal, JAXPORT handles containerised cargoes, passenger vehicles and breakbulk commodities, including paper, frozen poultry, beef, steel and lumber.

SERVICES

The 754-acre Blount Island Marine Terminal is JAXPORT's largest container facility and one of the biggest vehicle import/export centres in the US. The terminal also handles ro-ro, heavy lift, breakbulk and liquid bulk. JAXPORT's Dames Point Marine Terminal is home to the 158-acre TraPac Container Terminal, where vessels from Tokyo-based MOL and other carriers offer direct containership services with global reach. Immediately to the northwest of the TraPac Terminal, JAXPORT is working with Hanjin Shipping Co towards the development of a new 90-acre automated container terminal.

JAXPORT terminals feature 18 container cranes, on-dock refrigerated and freezer warehousing, Foreign Trade Zone status and outstanding intermodal connections. To help speed goods to market, shippers can take advantage of Jacksonville's location at the crossroads of three major railroads (CSX, Norfolk Southern and Florida East Coast Railway) and three interstate highways (I-95, I-10 and I-75). Jacksonville's port offers high container crane productivity averaging 37.5 moves per hour and fast truck turnaround times averaging 15 minutes for one move and 23 minutes for two moves (drop-off and pick-up).

A network of privately owned maritime facilities also operates in Jacksonville's

harbour and in Northeast Florida more than 65,000 jobs are related to port activity, which creates an economic impact of almost \$19 billion annually.

RAIL, ROAD LINKS

The Port of Jacksonville's rail and highway connections are among top advantages offered to shippers choosing the growing Northeast Florida cargo gateway.

Lad Daniels, former president of the Jacksonville-based First Coast Manufacturers Association, said: "Jacksonville's intermodal capabilities are second to none and offer growth opportunities for manufacturers and distributors seeking to expand their presence in the Southeast and Midwest."

JAXPORT terminals are served by two Class I railroads – CSX and Norfolk Southern – as well as the regional Florida East Coast Railway. CSX provides port customers with access to its 22,000-mile network encompassing 23 states and Canada, while Norfolk Southern covers 21,000 route miles through 22 states and the District of Columbia. FEC offers multiple daily departures serving Florida locations.

Future developments include plans to invest in a new intermodal container transfer facility. Projected to open as early as 2014, this new facility will complement existing on-dock rail at JAXPORT's Talleyrand Marine Terminal and Blount Island Marine Terminal and will further enhance the competitiveness of the TraPac Container Terminal in providing swift and efficient movement of growing cargo volumes through Northeast Florida.

More than 100 drayage and interstate trucking firms also operate in and around Jacksonville's port, enjoying swift truck turnaround times and ready access to such interstate highways as I-95, I-75 and I-10.

"Competitive rail service and superb highway connections give a major edge to companies that move goods through Jacksonville," said JAXPORT chief executive Paul Anderson.

PROMOTING DEVELOPMENT ACROSS THE CARIBBEAN FOR 25 YEARS

Perhaps the greatest contribution to regional development that the CSA has made in its 40-year history is the hosting of the annual Caribbean Port Awards competition.

On the request of the CSA's governing General Council, the CSA's Port Award Committee met in retreat in Jamaica in January and began a process of overhauling and improving this event. Out of this one-day retreat, a number of improvements for the 2012 Caribbean

Port of the Year competition were discussed.

Ever since it was launched in 1987, the Caribbean Port Awards has encouraged and stimulated best practices in marine terminals across the entire Caribbean and Latin American region. This was the reason for its establishment and it has fulfilled this role for almost a quarter of a century.

BRAINCHILD

Although it was the brainchild of the CSA's first PR director, Anthony Gambrell, mine was the task of creating an identity for this CSA initiative; an identity that would find credibility among CSA members, government authorities and news media across the region.

From writing the early news releases in 1986 and 1987, subsequent news features and speeches and as a de facto member of the CSA's Port Award Committee since its very

first meetings, I have been part of the development and evolution of this regional event.

INSPIRED

Against this background, I boldly make the claim that this single event has been, historically, one of the most important activities in Caribbean business, simply because it has inspired and encouraged development of a vital aspect of economic life.

By acknowledging and rewarding best practices on marine terminals, in a region dominated by island-states, the CSA's port award competition has over the years brought attention to the need for efficient, dependable, secure marine terminals. After all, an island-state with no overland economic links with trading partners must depend heavily on its ports and marine terminals for the very existence of its people. In this scenario there is little room for inefficiency and unreliability.

For almost a quarter of a century, since 1987, the CSA Port Awards competition has brought recognition and respect

By
Mike Jarrett



Point Lisas (PLIPDECO)



Guadeloupe

to many marine ports across the four language groups of the Caribbean and Latin America. Many of these marine facilities have been recognised by the CSA for successes in various aspects of terminal operations, taking awards for Dependability, Effi-



The old trophy: Port of Bridgetown displays its early successes



New trophies acquired. Barbados wins again



The CSA Port Awards competition has brought recognition and respect to many marine ports across the Caribbean and Latin America



ciency, Growth and Development and, since 2001, Security. Of the many, about a dozen have won the top award and the trophy for being the best in the region.

With the rapid change and advancement in maritime industries, driven by the technological revolution of the late 20th century and the digital age of the 21st century, this event has undergone more change than any other CSA programme. At various times in its history, the CSA Port Award Competition has been tweaked, expanded and refitted to meet the changes and challenges brought by the introduction of new systems, emerging

ideas, improved methods and increased demands placed on marine terminals. Indeed, the only thing constant about this CSA event is change.

This competition has assisted a number of Caribbean ports and terminals to market their facilities and to promote their development and expansion programmes to a world audience. The Caribbean Port Award competition has helped to attract new business for regional seaports and has helped to validate the efforts and initiatives taken by local port authorities and terminals to upgrade and improve their facilities.

COMPETITION

The competition encourages and promotes port development and efficient port operations. It recognises those ports that have sustained a high level of efficiency while maintaining programmes for ongoing development of human resources as well as management and operational systems. Indeed, no other single event in the Caribbean and Latin America has done more to encourage efficiency and development of marine terminals and seaports than the CSA's annual Caribbean Port Award competition.

Each year, the CSA's Port Award Committee compares the performance of participating ports. The Committee looks at operational efficiency, dependability of services and at programmes and initiatives implemented to achieve higher levels of productivity, growth and development. A high premium is placed on measures to make port facilities safer and more secure. At the end of the process, the CSA is able to announce to the world those Caribbean ports and terminals that have achieved



Suriname

high standards of operational performance.

SIZE NOT A FACTOR

Size and budget are not determining factors in selecting the winning ports and terminals. Rather, the CSA looks at performance, improvement and security. This means that any port in the Caribbean can win the top prize or any of the various sectional prizes, providing its management systems are sound and its corporate outlook is progressive.

In 2011, for example, two of the region's smaller ports won the major prizes. Paramaribo, Suriname, won for the first time, taking home the Luddy Stewart trophy for 'Best Multipurpose Terminal'. Fort-de-France, also winning the top award for the first time, was named 'Best Container Terminal' in a region with container terminals that are many times bigger. St Lucia won the top award for 'Best Multipurpose Terminal' in 2009 and Guadeloupe won it in 2008.

The guiding principle of the Port Award Committee has been: it's not how big you are; it's how good you are. 

For list of winners since the inception of this competition visit the CSA website (www.caribeanshipping.org); About CSA; Caribbean Port Awards.



Colombia

“
Size and budget are not determining factors in selecting the winning ports and terminals
”



Martinique



Barbados
(Sectional prize)



Kingston Wharves Ltd.
(Sectional Prize)



CELEBRATING FIVE YEARS OF SERVICE TO REGIONAL SHIPPING

In January 2007 the General Council of the Caribbean Shipping Association accepted proposals for the establishment of a magazine to serve its interests. The new magazine, as proposed by the Association's Director of Information and Public Relations, was to become the publication of record for the regional shipping industry and the official organ of the CSA.

There was scepticism initially by many within and without the CSA. Publications produced by not-for-profit organisations are not known to be financially self-sufficient over time. Indeed, the CSA's previous magazine had failed, but not just for economic reasons. It had become editorially weak, irrelevant and had lost the respect of its readers.

Adamant that, despite the legacy of doubt and uncertainty, **Caribbean Maritime** could be successful, the CSA's PR Director persisted with initiatives to develop and launch a new magazine worthy to be called 'the official journal of the Caribbean Shipping Association'.

In October 2006, riding one of the hemisphere's oldest railroads, across the isthmus of Panama, Mike Jarrett sat with Gary Gimson, Managing Director of Land & Marine Publications Ltd, of the UK, and again raised with him the possibilities of launching a magazine to document the history and development of the Caribbean shipping industry.

The publication was to be self-supporting, with no financial assistance from the CSA.

Why should this attempt be any different, Gimson asked. Why shouldn't the proposed publication not also fail like the previous CSA magazine? Mike argued that with high standards of journalism, knowledgeable writers and high publishing standards such as Land & Marine was known for, success could be achieved. Gimson, still sceptical about the economic feasibility but loyal to the Caribbean and the CSA, took the decision to give the new magazine, which Mike had by then named **Caribbean Maritime**, a try.

DISCUSSIONS

The two decided that three years was all that could be afforded for this trial period.

These discussions were being held even as the economies of the world headed for one of the most crippling recessions ever. Within one year after that meeting on the train in Panama, people in the USA were losing their homes to foreclosure and their lifelong savings to bank failures. **Caribbean Maritime** started its early years in the most hostile situation imaginable, riding an economic storm that raged across the entire planet.



It already enjoys the respect of the shipping industry within the Caribbean and without



The first issue of **Caribbean Maritime** came off the press in May 2007 and was well received by the membership of the CSA. In his editorial column in the first issue, headed 'Pursuit of Excellence', the Editor wrote:

"The mission of **Caribbean Maritime** is to support and facilitate the CSA so that the Association may achieve its goals. This we will do through the pursuit of excellence.

With relentless effort and attention to detail, **Caribbean Maritime** will achieve excellence and hence sustainability."

Three issues a year have been produced since May 2007 and the publication has never been late. Unlike its predecessor, it is not abandoned as garbage by CSA members at the end of CSA conference. To the contrary, readers are careful to take their copies with them and often seek to get a second or third to take home.

As the still fledgling **Caribbean Maritime** celebrates its fifth anniversary, it already enjoys the respect of the shipping industry within the Caribbean and without. Its articles and commentaries are quoted widely. It is circulated in hard copy and via the internet in the Americas, Europe and Asia. It has become an authoritative source of information as it documents the work, achievements, concerns and aspirations of the CSA, its members and stakeholders in the shipping industry of the Caribbean and Latin America. 



'One of the greatest tools CSA has to achieve its present and future goals'

Although my travels have been limited in recent years, I always try to keep informed about the Caribbean Shipping Association and its continuous progress. My active days with CSA placed a chip of affection in my heart and my memories of those days are a treasure to me. The *Caribbean Maritime* has emerged to be of a quality second to none and its information is of great assistance to me and my management staff. Our Caribbean shipping industry is always reinventing itself and has to continue this path to be able to maintain its quality level of the services it offers. I am proud to have seen CSA grow to improve the level of services to the principals to gain their respect and appreciation. This publication is one of the greatest tools CSA has to achieve its present and future goals.



Luis A. Ayala-Parsi,
*Past President,
Caribbean Shipping
Association*

'The publication has consistently informed - and with quality reporting'

This publication is a significant contributor to the livelihood and well-being of the people of the Caribbean. Many take maritime transportation for granted, not realising that it is an important part - and has always been - of the global economy.

In an increasingly globalised world, the publication has consistently informed - and with quality reporting - about the region's shipping, its ports, its port security issues, port and shipping logistics, port and shipping modernisation, and problems and issues related to ports and shipping in the region.

The Caribbean Institute of Media and Communication (CARIMAC) of the University of the West Indies' Mona Campus in Jamaica that has students from across the Caribbean, has consistently used the publication to (a) inform students of the importance and value of the shipping industry and shipping services to Caribbean economic development, and (b) as a quality publication to demonstrate an approach to specialist journalism that informs about important aspects of Caribbean development.



Canute James, PhD
*Director and Senior Lecturer
Caribbean Institute of
Media and Communication
(CARIMAC)
University of the West Indies*

'A kind of 'glue' that keeps our members together'



Frank R. Wellnitz,
*Director, Caribbean Feeder
Services Ltd and
Past President, Caribbean
Shipping Association*

When you participate in the annual meetings of the CSA in October each year, or in the Caribbean Shipping Executives Conference in May, it is easy to recognise that this is a very diverse and unique association of vessel owners, agents, ports and terminal operators and, as of late, NVOs and forwarders.

Unique, because the group comprises not only the full spectrum of the maritime industry and its peripheral services but also the private sector and government institutions.

Yes, we are all members of the Caribbean Shipping Association. We meet, we compare notes, listen to presentations. We provide training for our young people and we network. Sometimes we argue, for the benefit of all members and for the benefit of the Caribbean region and its people.

What keeps us together? No doubt, the common interest - but it needed some 'glue'. Our Editor Mike Jarrett some five years ago came up with the proper concoction: a kind of 'glue' that keeps our members together and provides reading material for those who care to know about us and what we stand for. He calls it the *Caribbean Maritime* magazine. You read about developments in the region and its ports, controversial issues, legal aspects, members' points of view and much more, not to forget a kaleidoscope of social activities, which shows without a doubt a healthy and happy family.

In short, the 'glue' is working. The magazine is a full success. We need it.



The Hon. E. George Hutson,
Minister of International Business and International Transport of Barbados

'The magazine provides a very important forum for the industry and its partners'

As Minister responsible for shipping in the Government of Barbados, I am very pleased to have this opportunity to congratulate *Caribbean Maritime* on the attainment of its fifth anniversary. The Government of Barbados recognises that the magazine provides a very important forum for the industry and its partners to be kept abreast of issues which are of significance to the entire maritime community of Latin America and the Caribbean, the sphere of operation of the now 40-year-old Caribbean Shipping Association

Barbados remains committed to maritime safety and security and the protection of the marine environment and in this regard a comprehensive review of our maritime administration will shortly be undertaken with a view to enhancing its administrative, operational, regulatory and legislative aspects.

We are working with the Barbados Port Inc. and other relevant agencies to improve the infrastructure and ensure increased safety and security at our port of entry. At the regional level, the Government of Barbados is very pleased that, as of May 1, 2011 the wider Caribbean Sea has been declared a Special Area under Annex V of the International Convention for the Prevention of Pollution from Ships (Marpol), thereby protecting our fragile marine environment from the disposal of garbage.

Barbados recognises the role played by shipping and its range of maritime activities in the socio-economic fabric of the region and will therefore continue to support regional initiatives relevant to the growth and development of the shipping industry.

I am happy to wish *Caribbean Maritime* every success as it continues its work on behalf of the region.

'Recording and amplifying the voice and vision of Caribbean Shipping'

Achieving your fifth birthday while remaining 'fresh, vibrant, topical and interesting' means one thing: you got it right first time. As a long-serving member of the Caribbean Shipping Association, with a lot of water under my hull (sorry, Schettino), I wish to congratulate *Caribbean Maritime* and its inimitable editor, Mike Jarrett, for recording and, indeed, amplifying the voice and vision of Caribbean Shipping.

Under the heading 'Spirit of the CSA' in edition No 13 (May to September 2011) on Page 47, the first paragraph so succinctly states who we are and what we do, that it is worth repeating here:

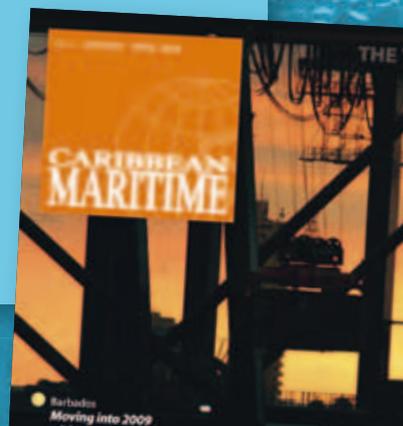
"The Caribbean Shipping Association has been a binding force for over 40 years. It brings together, in a vast network, the leaders and decision-makers in the shipping industry of the Caribbean and Latin America as well as North America. The Association's sphere of influence includes countries and territories from four language groups - English, Spanish, French and Dutch - from the northern coast of South America, across the Caribbean and Central America, to North American ports on the Gulf of Mexico and the Florida peninsula (the region)."

If the foregoing statement were a mathematical test, we could simply state: QED. This is what we do. The Italians of infamy would say 'cosa nostra' and the Trinis would declare that 'wine is what we do; beer is what we drink'. Shipping is what we do, and in vibrant Caribbean style. And nowhere else is it captured, in print and photo essays, as in *Caribbean Maritime*.

So, Mr Editor, I salute you and your publication with the firm conviction that these first five years are just a period that portends a future filled with timely information and the exciting quality articles that will continue to make *Caribbean Maritime* a cover-to-cover read. Bravo, *Caribbean Maritime*!



David Harding,
Chairman of Barbados Port Inc. and Past President, Caribbean Shipping Association



'We are proud to have Caribbean Maritime as an ongoing part of the Digital Library of the Caribbean'

Caribbean Maritime is an amazing resource for businessmen, scholars and students because of its pan-Caribbean coverage of Caribbean ports and the Caribbean maritime industry and all of its aspects, including both shipping and tourism. It is totally unique in its field. We are proud to have *Caribbean Maritime* as an ongoing part of the Digital Library of the Caribbean.

Will Canova,
Newspaper Projects Coordinator,
Digital Library Centre &
Florida Digital Newspaper Library



'It has been a pleasure working with Caribbean Maritime'

Caribbean Maritime has been a true partner and a solid medium for us at Wärtsilä to share our expertise. As Editor Mike Jarrett pointed out some years ago, *Caribbean Maritime* "is the tool that the CSA employs to stimulate a regional dialogue for solutions". This magazine truly stands to his statement. It has been a pleasure working with *Caribbean Maritime* to accomplish our common goals in delivering solutions and up-to-date discussions to the Caribbean shipping industry.

We in Wärtsilä plan to continue the collaboration with *Caribbean Maritime*, and wish this top-notch editorial much success in the coming years.



Tamara A. Rivera,
Marketing &
Communications
Administrator,
Wärtsilä
Caribbean Inc.

'This magazine has complemented the work of the CSA to the fullest'

Upon the first issue of *Caribbean Maritime*, published in May 2007, it was said that the journal would be a major institution in the work of the Caribbean Shipping Association. The philosophy then was that the journal would support the growth and development of the maritime industry in the Caribbean by providing relevant information. Over the past five years this journal has done that and much more. It has proven to be a major source of information on all aspects of the industry, whether cargo shipping, the cruise industry, operations on the ports or key organisations that drive the development of the industry. This magazine, which is the region's leading magazine of its type, has complemented the work of the CSA to the fullest. The magazine has garnered tremendous popularity because of the relevancy of the articles covered.

I congratulate the team as their hard work, perseverance and commitment has helped the magazine to reach this milestone. As a past president of the CSA, I am proud and honoured to be associated with its publication over the five years. I know the publication will continue to enjoy worldwide readership and provide a forum for the exchange of ideas which will support the growth and development of the industry. Congratulations!



Corah Ann Robertson-Sylvester,
CEO, Seaboard Freight & Shipping
Jamaica Ltd and Past President,
Caribbean Shipping Association



Ashley Taylor,
*President, Point
Lisas Industrial
Port Development
Corporation
(PLIPDECO)*

'I have seen the quality of the publication go from strength to strength'

Caribbean Maritime has, indeed, been the standard-bearer for the regional shipping community in being relevant, up-to-date and informative. I have seen the quality of the publication go from strength to strength and today I can proudly say it is one of the premier shipping publications.

Many of the stakeholders in the industry, both regionally and internationally, now use the publication as a credible source for information, staying abreast and remaining connected. It is now a major marketing tool as well for players in the industry.

Congratulations to the Caribbean Maritime publishing team for continuing to maintain the interests of stakeholders in a positive and profound way.

'I encourage you to continue publishing for another 50 years!'

Thank you so much for your willingness to archive *Caribbean Maritime* with the Digital Library of the Caribbean. High-quality industry publications such as this one are valuable to your current subscribers and to a variety of researchers for decades to come. Congratulations on your fifth anniversary. I commend you for the work you have done so far, and I encourage you to continue publishing for another 50 years!

Brooke Woolridge,
*Project Director, Digital Library
of the Caribbean, Florida
International University,*



Georg R. Sheets,
*Historian,
Publisher and
Literacy Advocate,
Harrisburg,
Pennsylvania, USA*

'As you reach your fifth anniversary, let me salute this special journal'

Through a friend who writes a column for your magazine, I have watched the publication and read with surprising interest the content of the last couple of years. Your magazine is an excellent publication and I like many of its elements.

The glossy, contemporary look of the publication is attractive. The cover always has an intriguing photograph and the contents page, broken down in a logical way, is conveniently placed, with colour photos that break up the print and welcome the reader to enjoy and learn. The contents are clear and precise.

The mission statement placed at the top of the page near the front, under the name and issue date, clearly defines this as the publication of record, linking nations, islands, cultures and ideas in a thrust for regional development. The editorial page is interesting and in the following pages you deliver comprehensible, diverse and informative material in a pleasing, colourful fashion.

I like the articles throughout, but have a great appreciation for the in-depth features, including the one in No 11 (October to December 2010), Pages 25 to 33, on the chronology of the oil rig disaster that began with the terrible event of April 20, 2010. The details, photographs and charts provide critical information that helps the layman (and, I suspect, the expert) to understand the sequence of events of the accident, as well as the terror of the days that followed. The clarity and recording of detail is the best I have seen anywhere, including the top newspapers and news magazines of the world.

As you reach your fifth anniversary, let me lift a glass and salute this special journal and congratulate the editor, writers, staff and layout people for jobs well done.

'Second to none - it keeps the membership well advised'

Caribbean Maritime has been with us for five years now. It is the official magazine of the Caribbean Shipping Association and it keeps its membership well informed by:

- Documenting the history of maritime development in the wider Caribbean and Latin America, even touching on the US ports that rim the Caribbean Sea
- Informed articles, anecdotes, humorous quips, biographies of its senior members and learned opinions
- In-depth discussions and information on host countries and their ports.

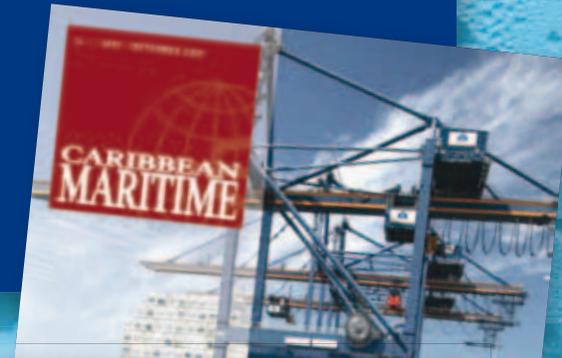
This publication is second to none, as its on-time delivery keeps the membership well advised as well as in eager anticipation of upcoming meetings. Indeed, its readership and participation stretches worldwide as shipping by its very nature embraces the world.

A few publications ago, keeping up with world trends, *Caribbean Maritime* went electronic. This, I think, was a master move. As we know, travel is an integral part of this business, so having this valuable and entertaining publication on line facilitates us even more.

Caribbean Maritime by no means came easily. It is by dint of the hard work performed by Mike Jarrett that we are here. Mike's no-nonsense attitude for meeting deadlines and producing quality documents is why we are here. So, Mike, to you and your team, congratulations, and I look forward to continue reading and keeping up to date with *Caribbean Maritime*.



Captain Rawle Baddaloo,
Past President, Caribbean Shipping Association



Stephen Bell,
Regional Vice President, Seaboard Marine

'On the cutting edge in providing information on key issues facing the industry'

On this your fifth anniversary, I hereby extend my heartiest congratulations on behalf of Seaboard Marine to the team at *Caribbean Maritime*. The publication continues to play a critical role in the Caribbean maritime industry through its insightful presentation of information relevant to the further growth and development of the sector.

It is commendable that the publication has remained on the cutting edge in providing information, whether it be relating to new trends in the industry, best practices or key issues facing the industry. Of note is its commitment to highlighting the various ports as well as assisting in promoting the transportation sector in this region.

In addition, *Caribbean Maritime's* continuous and unwavering support to the Caribbean Shipping Association as its official publication has facilitated the further strengthening of that organisation and its position as a voice for all stakeholders within the Caribbean maritime industry. As a stakeholder within that landscape, Seaboard Marine is grateful that the publication still remains as a source of data and analysis of opportunities and threats to the sector.

I wish for the organisation every success in the future.



5th Anniversary photo review



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FIVE YEARS OF CARIBBEAN MARITIME



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[1] CSA training course on Strategic Management for Cargo and Cruise Operations held at the Dutch Caribbean Training Centre in Curaçao on April 4 and 5, 2006. Mr. Fritz Pinnock led participants from Barbados, Aruba, Antigua, Curaçao and Bonaire through discussions about practical ways to position their companies.

[2] Three CSA Presidents in Panama in October 2006: newly elected President Fernando Rivera is flanked by then Vice President Carlos Urriola (left) and IPP Corah Ann Robertson-Sylvester. It was at Mr. Rivera's first General Council meeting as President (January 2007) that approval was given for the launch of **Caribbean Maritime**. **[3]** CSA's 14th President, Fernando Rivera, gets a warm hug from Jamaica's first female Prime Minister, Portia Simpson-Miller, in Miami, Florida, at the Caribbean Central American Action (CCAA) conference in December 2006. **[4]** Following the devastation of New Orleans by Hurricane Katrina, the CSA raised funds for the port workers. **Caribbean Maritime** recorded the presentation of the cheque to Gary LaGrange, CEO of the port, by then President Corah Ann Robertson-Sylvester. **[5]** The CSA's Founding President, (the late) Peter Evelyn, receives the CSA's Honorary Members instrument from then CSA President Corah Ann Robertson-Sylvester in Panama in 2006.

[6] Gary Gimson, the winning golfer in 2006, receives the Land & Marine Trophy, donated by his own company, from Corah Ann Robertson-Sylvester, as well as the President's trophy.

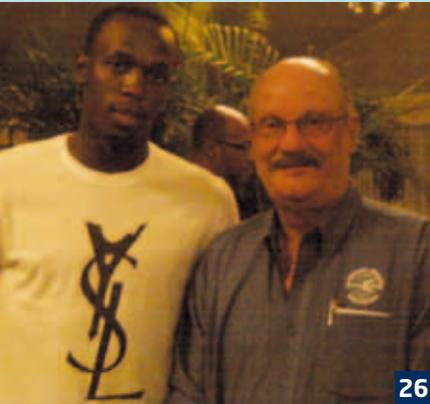
[7] Stephen Bell is cited for the quality of his work and dedication to the CSA during his tenure as General Manager from 2003 to 2008. **[8]** Capt. Rawle Baddaloo (left), the CSA member with the highest points in the 2008 CSA Golf Challenge, receives the Land & Marine Trophy from President Fernando Rivera.

[9] CSA President Fernando Rivera (left) and CSA's Director of Information and PR, Mike Jarrett (right), share a light moment prior to the start of the 38th AGM in Port of Spain. At centre is Dr. Carlos Gallegos, then Secretary of the Inter-American Committee on Ports - Organization of American States (CIP-OAS).

[10] CSA President Fernando Rivera (centre) receives an OAS flag from Dr. Carlos Gallegos,



5th Anniversary photo review



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of the Inter-American Committee on Ports, when the two organisations signed a Memorandum of Cooperation at the CSA's 38th Annual General Meeting in Port of Spain in October 2008. At right is CSA Vice President Carlos Urriola. **(11)** Members of the CSA's Silver Club gathered in Port of Spain at the 38th AGM, October 2008. **(12)** Newly appointed CSA General Manager Clive Forbes (right) greets his predecessor, Stephen Bell, at the 38th AGM. **(13)** CSA Cruise Committee chairman Nathan Dundas (right) greets John Tercek, of Royal Caribbean Cruises, at the 38th AGM in Trinidad and Tobago, where Mr. Tercek addressed the CSA.

(14) *Caribbean Maritime* has documented progress of the Panama Canal expansion. This picture (published in CM7) shows the ceremonial start of the evaluation of three proposals for the third set of locks. **(15)** and **(20)** CSA Past Presidents David Harding and Fernando Rivera, honoured for services to regional shipping by the Caribbean Maritime Institute, receive their award from Jamaica's then Minister of Transport, Michael Henry. **(16)** Winner of the CSA-Monica Silvera Scholarship, Wallace Collins.

(17) The President of Suriname, His Excellency Runaldo Ronald Venetiaan (left), was presented with the CSA's ship's decanter by then Vice President Carlos Urriola at the 39th AGM in Paramaribo. **(18)** John Fernandes Ltd celebrated its 50th anniversary in Georgetown with a glowing ceremony hosted by its chairman and CSA stalwart, Chris Fernandes (right). **(19)** CSA Past President (the late) Ludlow Stewart says farewell to the CSA and receives a citation from President Carlos Urriola at the 40th AGM in Montego Bay.

(21) MIT staff volunteers in the company's social and community outreach programme were featured in CM10. **(22)** The Governor of Curaçao, Lizanne Dindial, receives the coveted CSA ship's decanter from CSA President Carlos Urriola after she gave the keynote address at the 9th Caribbean Shipping Executives Conference in May 2010. **(23)** CSA Past President (the late) George Noon honoured by the Shipping Association of St. Lucia. **(24)** Panama Canal Administrator Alberto Aleman (right) addresses the CSA in October 2010. **(25)** CSA Silver Club in session, Montego Bay, October 2010. **(26)** Fernando Rivera poses with Jamaica's Usain Bolt. **(27)** Caribbean Feeder Services celebrates its 10th anniversary with a special event at Port Royal Jamaica, hosted by its founder and director (and a CSA Past President), Frank Wellnitz (right). **(28)** The chairman of the Caribbean Tourism Organization, the Hon. Ricky Skerritt (left), and CSA President Carlos Urriola at the 2011 Caribbean Shipping Executives Conference in Guadeloupe. **(29)** The Prime Minister of Barbados, the Hon. Freundel Stuart, gives the keynote address at the opening of the 41st AGM, October 2011.

(30) and **(32)** As part of the social projects of the Panama Canal expansion, the Panama Canal Authority (ACP) taught the women who lived in the canal watershed to carve ships out of the basalt rock extracted from the excavations. Here **(30)** the President of the Shipping Association of Barbados, L. Marc Sampson, and **(32)** the Acting CEO of Barbados Port Inc., David Jean-Marie, receive from the CSA President, Carlos Urriola, their 'piece of the Panama Canal'. 

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DEVELOPMENT OF THE DEMERARA PORT... GUYANA'S MOST URGENT PRIORITY

The delay in dredging the Demerara Navigational Channel has been identified by Guyana's maritime sector as the basis for issues that have reduced opportunities for growth.

According to the Shipping Association of Guyana (SAG) in a review produced exclusively for **Caribbean Maritime**: "The country's maritime sector continues to be challenged to respond positively to international developments in the transportation sector."

The Demerara Harbour is currently the main hub of all import and export trade. However, there is a point of view in the country's shipping community that the issues that have stymied opportunities for significant growth are 'inextricably linked' to the delay in implementing port development measures in the country's main harbour. The Shipping Association of Guyana has been making its voice heard on this issue (that is, the need to do major work on the Demerara port). It received the support of the Caribbean Shipping Association when CSA President Carlos Urriola visited and addressed the Association in 2010. Then, last year, the SAG's lobby to develop a public-private sector partnership that would deliver a workable solution to enhance and modernise existing port infrastructure

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The country's maritime sector continues to be challenged to respond positively to international developments in the transportation sector

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recorded further success. The SAG reportedly attracted broad private-sector support, particularly from the main business organisation, the Private Sector Commission.

This development initiative by the SAG is expected to generate significant benefits for all operators in the maritime sector, especially for entrepreneurs involved in the sugar, timber, fuel and cement industries.

ECONOMIC INTEGRATION WITH BRAZIL

The Demerara port is also expecting a tremendous boost in cargo exports in the years to come. Last year, the private sectors in Guyana and Brazil formally entered into an economic integration agreement and by the end of the year the initial market survey was nearing completion. With Guyana positioned on the Atlantic seaboard close to the countries of the Caribbean, Brazilian business operators have identified the tremendous benefits for export to be derived from using cross-country corridors and overland transport systems to access the Demerara port.

Officials from the Brazilian business support organisation, Sebrae, indicated early in the negotiations that transporting Brazil-

ian produce, especially from the southern states of Roraima and Amazonia, through Guyana to the Demerara port would be less time-consuming and costly than using the Brazilian Atlantic ports in the north.

The government of Guyana is clearly enthusiastic and has been proactive in facilitating this economic integration programme between the two South American countries. The Guyana government has reportedly allocated an 80-acre parcel of land in the border town of Lethem for construction of a huge transshipment facility.

PORT AND RIVER CORRIDORS

"The SAG intends to spearhead the process that will involve movement of cargo through Guyana's road and river corridors from Lethem to the Georgetown Port," said the Association in a statement of commitment.

The membership of SAG examined these initiatives very carefully at a high-level caucus last October. The caucus was called to prioritise the maritime enhancement strategy for quick implementation during this year.

Conscious of its role of representing maritime interests and championing maritime development in an ongoing dialogue between the commercial sector and

governmental oversight bodies, the SAG's timetable for this year includes frequent engagements with these various entities. This dialogue between all the relevant agencies and departments will help to keep the main issues affecting the maritime sector at the top of the national development agenda.

The consensus is that the most urgent agenda item, by far, is the long-overdue development of the Demerara Harbour.

"The urgency of this programme cannot be overstated," said the SAG. "It has a direct bearing on the viability of local commerce and Guyana's capacity to sustain existing market agreements with countries in the Caribbean, North America and Europe."

UPGRADING HUMAN RESOURCES

In its thrust for development, the SAG is mindful of the need for its staff to be well trained. The SAG has linked viability of the maritime sector to the skill and capabilities of its workforce.

"The drive to significantly improve the viability of Guyana's Maritime sector in 2012 will also involve closer collaboration with the Caribbean Maritime Institute (CMI) in the area of training and skill development," said the SAG. "The CMI had, in the past, facilitated a diploma-level programme at the Critchlow Labour College and with the University of Guyana. SAG is already in discussion with the CMI seeking technical assistance to resuscitate university-level programmes in Maritime Transportation and Transport Logistics."

SKILLS

Meanwhile, private terminal owners and all other service providers have begun to identify the skills needed at all levels of their operations. The resulting needs analysis is expected to form the basis for SAG's renewed advocacy with the country's Ministry of Education to include maritime academic programmes in the curriculum at the University of Guyana. 

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The drive to significantly improve the viability of Guyana's maritime sector in 2012 will also involve closer collaboration with the Caribbean Maritime Institute in the area of training and skill development
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MOENGO PORT FACILITIES UP AND RUNNING

By
Ivan Cairo



Just three years after Traymore Docks took over an obsolete bauxite export terminal in Moengo, eastern Suriname, from the US-based multinational Alcoa, this privately owned port has been transformed. The terminal at Moengo is being refitted to offer regular port services and has become a major fuel distribution point in the area.

Last year Traymore acquired port equipment including mobile stackers and upgraded security systems.

ON TRACK

Traymore's CEO, Eugene Profijt, said: "We didn't process any containerships as yet, but we are still on track to become Suriname's second-largest port facility and a major hub for freight destined for neighbouring French Guiana."

Discussing the port's current activities and future plans, Mr. Profijt said that, before year-end, storage facilities would be offered to wood exporters. The port manager said a significant amount of Suriname's wood destined for foreign markets was being harvested in the Marowijne district.

"Why take the logs all the way to the port in Paramaribo, some 100 km away, when you have a facility nearby and making use of that could save you a lot of money as exporter," he argued.

GROWING

Meanwhile, the Moengo company is tapping into the area's growing economic activities, especially in the mining and forestry sectors. From its 53,000 barrels bunkering facility, Traymore distributes fuel to sand and gravel miners and other building material producers. Fuel is also sold to small-scale gold miners and forestry companies. Each month the port handles two fuel tankers from Trinidad and Tobago. "We have our own fuel trucks for distribution," said Mr. Profijt.



Entrance to Traymore's Moengo facility

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While container handling has not yet become reality, cargo and packed goods are already being processed

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Traymore workers unload equipment for local mining company

While container handling has not yet become reality, cargo and packed goods are already being processed. According to Eugene Profijt, container handling is delayed because of the ongoing reconstruction and upgrading of the east-west highway to French Guiana. Currently, a lot of freight for French Guiana is being handled at the Nieuwe Haven port in Paramaribo. He anticipates that some of this freight will ultimately be handled at Traymore Docks.

The road, however, is in a deplorable state in some sections and is now under reconstruction.

"The French border is just a 30-minute drive away, if the road was in good condition," he said. "At the moment it would be too difficult to transport containers."

Traymore Docks also expects contracts in the near future from the USA-based

mining multinational Newmont, which is currently negotiating with the Suriname government a gold-mining contract near Moengo. Newmont has announced that it would invest up to US\$ 800 million in establishing a gold mine in the Merian area, south of Moengo.

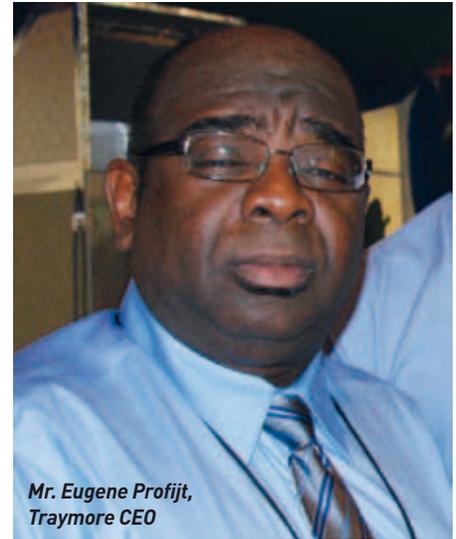
In order to meet international port standards, security at the Moengo facilities has been upgraded. The docks are fully monitored electronically, with armed guards on duty. Since there is no adequate hotel accommoda-

tion in Moengo, Traymore has established several fully furnished apartments on its premises to provide overnight accommodation for ship's crew. The company has also purchased two buildings in the former bauxite city to provide housing for a local manager and office accommodation.

FACILITATE

"We don't want to be a competitor for other ports in the country, but we want to position ourselves as a port to facilitate economic development in the Moengo and Marowijne region," said Mr. Profijt. "One of our main objectives is to facilitate production activities in this region. Whoever wants to do business in this area, in the long run will have to deal with us, since it would be more cost-efficient to do business with us."

He regards the investments in the Moengo port as a long-term asset. However, the company is already seeing some return on its investment.



*Mr. Eugene Profijt,
Traymore CEO*

"We are confident that the economic activities in this part of Suriname will continue to grow and that our port facilities will play an important role in the future development of the Marowijne district," said the Traymore CEO. 



Container stackers have been acquired

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PHOTOGRAPHY: Agency



CURAÇAO SEES GROWTH

Plans for development being kept 'under the radar'



Curaçao, now in its second year as an autonomous state within the Dutch Kingdom, is on the threshold of a new period of development and the shipping industry in that country is looking to the future with optimism and eager anticipation.

Following the dissolution of the state of the Netherlands Antilles on October 20, 2010 new political parties have been formed, elections have been held and plans for development are being drafted or otherwise already being implemented.

A new vision has been created for the country's maritime sector. The plan involves

expanding and upgrading maritime services in and around the five harbours of Curaçao and especially at the port of Willemstad, where the focus is on developing the properties next to the wharves. These plans are part of the harbour policy which is embodied in the economic thrust of the new government.

ENCOURAGING

The pains inflicted by the global recession still hurt; but port performance last year, as compared with 2010, was encouraging. The number of ships piloted inwards in 2011 was the same as 2010. Tanker calls increased by 23 per cent. The ISLA refinery (the Refineria ISLA Curaçao, located in Curaçao's Schottegat harbour) is fully operational again and storage facilities at the port of Bullenbaai have been upgraded. Workboats and platforms have made good use of the ports of Curaçao in recent years and their presence has increased, marginally, by about two per cent.

Cruise ship calls have increased by 13 per cent as Curaçao's popularity as a cruise destination increases.

Activities last year at the container terminal, operated by Curaçao Port Services (CPS), compared favourably with 2010. The two gantry cranes are slated for upgrading in the near future. Meanwhile, the maintenance

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Cruise ship calls have increased by 13 per cent as Curaçao's popularity as a cruise destination increases

”

programme has been boosted so as to ensure dependability at this facility.

KTK Tugs, the Curaçao Towage Company, has seen an upturn in local operations because of the increase in vessel calls and is now focusing on optimising its local services in tug assistance and maintenance. Regional and international ventures for towage and salvage are still a high priority for KTK and the company has deployed, through lease arrangements, three of its tugs on the international market.

Curaçao Drydock Company (CDM), once regarded as the most competitive in the entire Caribbean-Latin American region, has come up with a turnaround vision. CDM is concentrating on rebuilding this reputation and the implementation of plans towards this end





Curacao

has already begun. Expectations are high as CDM has all the facilities and expertise needed to regain its market share.

The ISLA refinery is in full operation again. The cat cracker and the energy support plant, which had what have been described as 'operational challenges' in 2010, have been upgraded and have been functioning satisfactorily for over a year. The spin-off business that the refinery brings to Curaçao is of great economic significance.

PERFORMANCE

The Curaçao Pilots Organisation (CPO) reported improved performance and effectiveness in time management and operations. The skill and professionalism of Curaçao's pilots, especially over the last 10 years and more, have earned them the reputation of being among the best in the region. Small wonder, since they have to deal with and overcome, daily, the challenges of manoeuvrability posed

by the limited berthing space in the port of Willemstad. Emphasis is now being put on registration and automation so as to further improve the daily operations in the ports in which they operate.

Curaçao is seeing growth in cruise ship business. Indeed, the country expects 500,000 cruise visitors this year and there is a strong determination to keep this momentum. Plans for the construction of a second pier just outside the entrance of the port, next to the existing pier, have long been discussed and the new government is resolute in its plans to construct this berth. In preparation for the start of construction of this long-awaited facility and a new cruise terminal, a master plan has been developed. Expectations are for the first foundation stone to be laid this year. This will be a timely move as Curaçao plans to host the 2012 Florida-Caribbean Cruise Association Conference and Trade Show in October.

The port and terminal development in



Curaçao have been the focus of the port authority's efforts this past year, but there has not been a lot of emphasis on publicity and promotion. Indeed, most plans have been kept out of the spotlight.

"Not all ideas, plans or projects need to be high-profile if your main objective is change and sustainability," said one port executive. "Quality in performance and elevated standards are not tangible virtues. Sometimes it is smart to be discreet and navigate under the radar." 

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Call it rocking PortMiami

By

Rick Eyerdam



There has been a change in the lexicon of cargo carriers and cruise operators calling that Dodge Island port on Biscayne Bay. No longer the Port of Miami, it is now called PortMiami.

Director Bill Johnson recently told a sold-out 'state of the port' luncheon: "At PortMiami, business as usual is not business as usual. The many projects now under way and accomplishments I am about to describe prove that PortMiami is rocking.

"At PortMiami a new era is upon us – and with it a new look," Johnson told port stakeholders. He spoke about the port access tunnel, under construction; the nearly completed near-dock, the Florida East

Coast railroad track; and the long-awaited Deep Dredge.

The tunnel seems to be a done deal, with only three questions remaining. Which law enforcement agency among the half dozen in South Florida will police the tunnel?

Which emergency responders will respond if an accident should occur under Government Cut? And how difficult will it be to control heavily loaded containers up and down the tunnel's extremely steep gradient?

QUESTIONS

The Deep Dredge, permitted by the Corps of Engineers to 50 ft, also faces some rocky questions asserted in a court challenge by a coalition of environmental activists and the millionaires who occupy an island hideaway next to the planned explosions and excavation. The conservationists are concerned about adverse impacts on fish and sea grass. The wealthy are worried that the

dredge charges might damage the foundations of their high rises.

The rail line has generated little controversy so far because none of the slow freight trains have followed the newly reconstructed tracks through the most dense section of downtown Miami, stalling traffic on all roads but the Interstate.

But PortMiami has a long history of overcoming community consternation. "There are some who are trying to slow us down," said Johnson. "I can assure you, we remain committed to the timeline that will have our channel at minus 50 ft come 2014."

Responding to the environmental challenge, he said: "This is a federal project managed by the Army Corps. I can assure you they, along with our port and the State of Florida, are committed to protecting our most important natural asset – Biscayne Bay and the surrounding ecosystem. Our dredge project has been studied for more

“

At PortMiami a new era is upon us – and with it a new look

”





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than 10 years and meets the highest environmental standards.”

OPPORTUNITY TO GROW

Johnson told the luncheon: “The one thing we cannot do is delay the dredge – unless we are willing to pass up what’s been called a once-in-a-generation opportunity to grow our economy.”

As for the new rail line, which is 80 per cent complete, Johnson said: “No major port can be successful without on-port and on-dock rail. Time to market – that’s the bottom line for everyone in this room who moves product – the shippers, logistic providers, freight forwarders.”

Johnson praised the port partners for sustaining productivity amid the constantly changing access and construction projects on the port and a mercurial trade economy beyond.

NUMBER ONE

“Again, we are on top as the number one container port in Florida,” he said. “Nation-wide we are Number 11, up from Number 13 a couple of years ago. I am pleased to report that cargo traffic increased seven per cent last year—a solid performance given the ongoing economic difficulties in the global marketplace. This follows a five per cent increase the previous year.”

Johnson, in his sixth year as port director, said: “By any measure, PortMiami has navigated well, very well, through a very tough economy. In the four-year period since 2008 – when the recession hit hardest – teu [handled] at our port increased 9.2 per cent, more than many major container

ports. We outperformed New York/New Jersey, Los Angeles, Long Beach, Houston, Charleston and our neighbour up the block, Port Everglades.”

PRAISE FOR SEABOARD

Johnson singled out non-union Seaboard Marine for praise among the three PortMiami cargo terminals. The dedicated terminal surpassed both the common-user terminals.

“We continue to make significant improvements to the yard used by Seaboard Marine, our largest shipping line,” he said. “Seaboard posted a record last year at PortMiami, moving in excess of 400,000 teu, more than 40 per cent of our business. Thank you, Seaboard – we value our partnership.”

PARTNERS

Then he immediately said: “At this time, I would like to recognise some of our other critical partners in growing the business, starting with ILA Local 1922 and 1416. In August, Local 1416 will celebrate its 75th anniversary at our port. You play a vital role in growing our business.”

PortMiami’s largest score in the recent years has been among the cruise ship companies.

“No other cruise port in the world comes close to matching our cruise passenger traffic,” said Johnson. “In 2011, for the fourth year in a row, 4 million plus cruise vacationers passed through our port.”

He asserted the challenge to Port Everglades, again proclaiming: “PortMiami has long been known as the Cruise Capital of

“
No other cruise port in the world comes close to matching our cruise passenger traffic
”

the World – and it will always be the Cruise Capital of the world.”

To make the case, Johnson cited:

- Three additional cruise lines, some of the best names in the business, are coming to our PortMiami.
- Regent Cruises, a market leader in the luxury segment of the industry, announced that is relocating its operations to PortMiami in the fall of 2012.
- An agreement with MSC Cruises, which is making PortMiami its exclusive home port, beginning in the fall of 2013.
- Disney Cruise Lines makes its debut in December 2012 when the *Disney Wonder* sets sail from PortMiami.
- Reaching a long-term lease with Royal Caribbean, thus ensuring that the company will keep its headquarters in the port through to 2021.

The expansion of the PortMiami cruise fleet will include three new ships still under construction in Europe: the *Celebrity Reflection*, the *Carnival Breeze*, and the *Oceania Riviera*. These new vessels will rank among the most exciting and innovative in the world.

“Globally, only four new ships will be introduced in the US this year,” said Johnson, “and three will come here to PortMiami.”

The Miami port director said part of the attraction was the just-completed \$3 million upgrade to a ‘boutique terminal’ used by luxury lines.

Also under way is a \$15 million expansion of Terminal D, which serves the port’s largest customer, Carnival Cruise Lines. 





**DEVELOPING PUBLIC-PRIVATE PARTNERSHIPS
FOR PORT DEVELOPMENT**

A 'win-win' model in action

APM Terminals has established quite a presence in the western hemisphere and particularly in the Caribbean, Central America and South America. And, with 6.5 per cent growth projected for Latin America by Drewry Maritime Research, it is now clear that Latin American container markets will continue to be a focus area for the European giant.

APM Terminals already operates facilities in Buenos Aires, Argentina (Terminal 4); and Itajaí and Pecem, both in Brazil. In July last year APM Terminals added Muelle Norte in Callao, Peru, to its list of terminals, having won the concession in a competitive tender process.

Other recently announced investments in Latin America include the construction of new facilities in Moin, Costa Rica (see Page 34); Lazaro Cardenas,

Mexico; and Santos, Brazil.

Kim Fejfer, chief executive of APM Terminals, said: "With over 550 million people and significant growth in seaborne trade, Latin America has unmet demand for access to the global logistics chain. APM Terminals will pursue opportunities in the region to facilitate trade and support economic growth."

Joe Nielsen, former chief financial officer for APM Terminals' activities in the Americas Region, has been appointed managing director, Latin American Terminals.

Mr. Nielsen, who is based in Panama, said: "Having been able to add port terminals to our regional portfolio and improve access to global trade for the related countries is the result of hard work of our business development team in Latin America, in close cooperation with our local partners, governments,

port authorities and other key stakeholders. APM Terminals will continue to explore opportunities throughout the region and support modernisation of infrastructure."

GOVERNMENT LIKED OUR PLAN

Looking back at the successful Callao tender, Robert Bosman, APM Terminals' general manager Business Development Americas, said: "We worked on the Callao project for one and a half years ... closely with our local partner, Central Portuaria, the Peruvian government and the port authority. We started the process by proposing a private initiative to the Peruvian government in which we offered to modernise and operate Muelle Norte as a multipurpose terminal. We invested a lot of man-hours and knowledge in this proposal and initially you do not know if your proposal will be accepted. But we always believed in this project. The government liked our plan and decided to start a public tender process for Muelle Norte."

The concession contract guaranteed the Peruvian government investments of US\$ 749 million in modernisation of the terminal. This level of investment will ensure

that Peruvian importers and exporters have an efficient and reliable multipurpose terminal. This is important for Peru as the Port of Callao is the nation's main gateway for international trade and a potential hub for the west coast of South America.

APM Terminals connect with governments and local port operators to build long-term mutually beneficial partnerships for the development of port infrastructure to a level that countries need in order to stay competitive in international commerce, given the rapidly developing customer requirements and market demands of today's world. This model

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APM Terminals will pursue opportunities in the region to facilitate trade and support economic growth
”



of cooperation works well and offers advantages for port terminals in the region. Such advantages include operational knowledge, commercial relations with over 60 shipping lines, global training programmes, access to equipment contracts, information systems and other economies of scale which APM Terminals, as an international operator, can offer.

A good example is the case of the Muelle Norte in Callao (mentioned previously), now operating as APM Terminals Callao. Since assuming control of Muelle Norte on July 1, 2011, crane productivity has increased to more than 26 moves per hour per crane. Gate turnaround time has decreased by 49 per cent to 28 minutes in the first 29 weeks of operations. Already, APM Terminals has invested US\$ 27 million of a total of US\$ 749 million earmarked to modernise and expand the existing facility. Plans are to build a terminal which will eventually have a capacity of 2.9 million teu. The installation of a new grain silo will allow for 9.9 million tons of general cargo capacity over the next decade.

"In APM Terminals we believe in the development of an environmentally sustainable and safe operational platform, as everywhere in our terminals around the globe," said Mr. Bosman.

A good example of this is the use of electric rubber tyred gantry cranes in Callao. The development of the new terminal of APM Terminals in Moin, Costa Rica, will see full implementation of these policies. The focus will not only be on environmental protection measures but, equally importantly, the introduction of clean energy sources for reducing carbon dioxide emissions at the Moin facility, with recycling

processes at all levels within the operation as well in the community at large. Through job creation, health and safety initiatives, business practices, proactive environmental policies, APM Terminals sees great potential to create positive change in local communities, a responsibility that is clearly taken very seriously.

PRIORITY

Safety is a global priority within APM Terminals.

"We want our employees to go home safe and in good health after a working day," said Mr. Nielsen. "We made significant positive changes in terminals that we took over around the world, but we always want to improve further. We have a zero tolerance on safety issues."

The safety culture of APM Terminals was recently acknowledged in the United States, where the company was presented with the Gerald H. Halpin Safety Excellence Award for 2010-2011 by the Signal Mutual Indemnity Association. APM Terminals' operations in the USA were cited for Signal's highest award, which recognises the Signal member that best exemplifies the promotion of employee safety and health throughout its organisation. Accident prevention and safety culture are at the very heart of APM Terminals' daily operations throughout the world.

Last year the company also won the Lloyd's List Global Safety Award.

Mr. Bosman believes APM Terminals has a lot to offer in developing port terminals throughout the region. And he says this has been proven by the new terminals in which the company is engaged.

"APM Terminals' manage-

ment style is transparent, open and straightforward," he said. "We work according to our values and we have clear business principles. We truly want to create and operate efficient, safe and environmentally sustainable port terminals with our partners, enabling countries to compete effectively in global trade and facilitate economic growth."

Joe Nielsen agrees. "We truly believe that public-private partnerships and other types of cooperation between developing port terminals in Latin America and APM Terminals can be developed in such a way that it is mutually beneficial. National interests are protected and efficient port terminals for the future are ensured, offering services that customers need.



Joe Nielsen



Robert Bosman

"This will enable countries to connect competitively to global commerce. Infrastructure is a key priority to avoid bottlenecks for further growth in Latin America. APM Terminals have seen and created examples in Latin America of successful port infrastructure projects. We are confident that we will see more successful regional port infrastructure projects in the future and APM Terminals wants to be part of that." 

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CSA PHOTO ALBUM

An album of photographs taken at the CSA's 41st Annual General Meeting in Barbados, October 2011.





Moin – a new terminal in the making

While Costa Rica has had exceptionally consistent economic growth over the past two decades, little of this growth has been in evidence in the Caribbean province of Limon, where most of the Jamaican descendants have resided since the late 1800s.

This is about to change with the development of a modern container terminal in Moin.

Captain Paul J. Gallia, managing director of APM Terminals Moin, explained: "The Costa Rican government has in place, as part of its strategy for continued growth in international commerce, a master plan to modernise the ports and logistics in the country. A major component of this plan is the new Moin Container Terminal."

CONCESSION

In March 2011 the Netherlands-based company APM Terminals won a 33-year concession to design, finance, construct, operate and maintain the Moin Container Terminal (TCM).

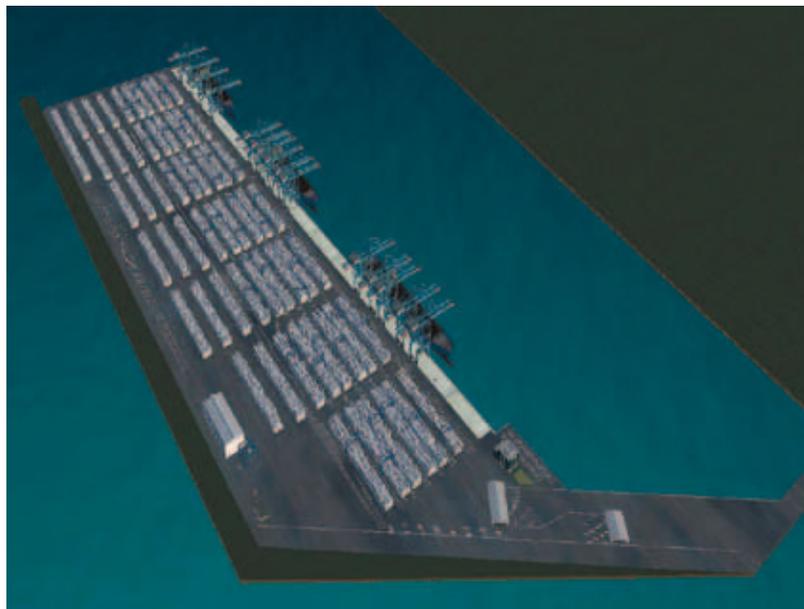
Following an investment of US\$ 992.2 million, the new facility is due to enter service in 2016. It will therefore benefit from the Panama Canal expansion, having

been designed to serve the larger post panamax ships.

In its first phase of operation, TCM will have 600 metres of berthing; 40 hectares of container storage on reclaimed land, protected by a 1.2 km breakwater; a 16 metre deep access channel; and 14.5 metres depth alongside. Six super post panamax STS cranes will provide world-class productivity. Safety and security will exceed mandatory international standards.

APM Terminals' general manager in Moin, Rogelio Douglas, a native Costa Rican, said: "The existing ports of Limon and Moin can currently only handle ships up to 2,500 teu. Despite this restriction in vessel size and a lack of cargo-handling equipment in 2011, they handled just under 900,000 teu. The projected economic growth of the country and the increasing containerisation of refrigerated exports suggest this figure will increase to over 2 million teu within 20 years. This forecasted growth underscores the need for a modern, safe and efficient container terminal operation."

The TCM project is the largest single infrastructure



private investment to date in the country and APM Terminals is the first multinational major investor in Limon since the Standard Fruit Company back in the early 1990s.

INTEREST

Mr. Douglas said: "Since the announcement of the concession award and the contract signing a few months later, there has been an increasing volume of interest from foreign investors interested in developing operations close to the new container terminal location, where the local transportation costs, warehousing and labour are expected to be much more attractive. This investor confidence has already been crystallised by real estate developers, nature tourism specialists, Free Trade Zone investors and the manufacturing sector looking to install their centrally located Americas logistics and distribution operations close to a modern deepwater terminal."

The Caribbean province of



Captain Paul J. Gallia

Limon provides Costa Rica's highest level of native bilingualism (English and Spanish); a culturally diverse labour force (African-Caribbean, Latin, indigenous and oriental descendants); and very attractive operation cost-points.

The TCM project has quickly gained a high profile domestically – with a potential to increase the national GDP by one point – as well as internationally – underscoring the government's interest in major infrastructure projects under concession partnership with private enterprise. 





Cartagena continues in growth mode, sets new record



The Port of Cartagena has announced strong growth figures for 2011 and the setting of a new annual production record.

The port has been recording double-digit growth figures for five consecutive years. A total throughput of 1,853,342 teu in its three terminals (Manga, Contecar and El Bosque) was achieved for the year just ended, up 17.02 per cent as compared with 2010 when the leading Colombian port handled 1,581,401 teu.

GROWTH

Cartagena's growth is mainly related to the strengthening of Colombia's national economy as well as increased volumes in transshipment operations. This performance has made the South American port one of the most dynamic hubs of the region.

The port expects even further growth in the years to come as the country is actively involved in establishing new free trade agreements with the USA, countries in Europe, Turkey and South Korea.

In order to prepare for the larger ships expected to serve the region once the Panama Canal expansion is completed, the Port of Cartagena has prioritised three aspects of its operations: (a) infrastructure;



(b) people; (c) technology and equipment. The strategy involves:

- Implementation of an expansion plan, in phases, which will bring a combined capacity of 5 million teu into two main terminals (Contecar and Manga);
- Construction of a new access channel (18.0 metres draught);
- Plans to operate 22 STS gantry cranes over 1,700 metres of quay wall for vessels of up to 14,000 teu capacity;
- Focus on the needs of the workforce; hiring of motivated employees and constantly preparing and training workers for the new challenges ahead;
- Updating technology and challenging systems and methods in order to ensure a reliable service.

The Port of Cartagena sees its greatest challenge as coping with ever-growing volumes of cargo in Colombia, the result of the tremendous economic growth that the country is experiencing at present.

CHALLENGES

"We, as a country, need to develop the internal infrastructure in order to optimise the new challenges and opportunities that Free Trade Agreements as well as the Panama Canal expansion will bring," the port declared in a recent statement. "We need to understand the market, in these troubled times, and invest in a timely matter for all the opportunities that are out there."



“

Cartagena's growth is mainly related to the strengthening of Colombia's national economy

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Perhaps the greatest challenge is that Colombia is rapidly becoming a trade hub without having really planned it.

"We continue in many ways with an Andean mentality," said one official. "It is costing us a lot to develop infrastructure in the coastal cities for all the new industrial developments moving from the highlands to the coasts."

Many times winner of the CSA's Caribbean Port Awards, the Port of Cartagena, with its three efficient terminals, has proven it has the capability and the leadership to deal effectively with growth and expansion. 



The bridge design is inspired by similar infrastructure work in Spain, Korea, France, China and Japan. It will be located 3 km north of Gatun Locks and the new post-Panamax locks on the Atlantic side.

Road bridge project under way

PRE-QUALIFIED BIDDERS NAMED

Amid news reports that the Panama Canal's new locks will probably not be ready for the scheduled opening in October 2014, the Panama Canal Authority (ACP) has announced the pre-qualification of the two consortia and one company interested in bidding on a tender for a road bridge over the canal at its Atlantic end.

A report in a normally reliable global publication, the Journal of Commerce, said that, after a three-month delay, the locks would be ready for a trial run in December 2014. (See Grapevine, Page 42). Although this story could not be confirmed up to press time, there was no denial from the ACP up to then.

The bridge construction project is proceeding apace, however, with the naming of the three entities pre-qualified in the tender process. The pre-qualified tenderers are:

- Consorcio Acciona Infraestructuras-Tradeco (Spain and Mexico)
- Odebrecht and Hyundai Joint Venture (Brazil and South Korea)
- Vinci Construction Grands Projets (France).

The pre-qualification was made after a technical board comprising canal professionals analysed all the information submitted by the interested parties relative to the technical criteria,

their experience and financial capacity. The bidders will now participate in the second round of the process, after which the contractor responsible for construction will be selected.

The second phase of the process will begin with the submission by the ACP of the instructions to tenderers. This will include the design and contract specifications; a special site visit organised for the pre-qualified tenderers; and the receipt of final proposals in or about August of this year.

Construction of the bridge by the ACP is authorised by law. It is included in Article 3 of Law 28 of July 17, 2006 – the legislation under which the construction of the Third Set of Locks for the Panama Canal was authorised. That legislation

mandated the construction of a road bridge on the Atlantic side to link both canal banks.

The bridge design was inspired by similar existing infrastructure in France, Spain, China, South Korea and Japan. The double-plane, twin pylon, cable-stayed bridge will carry four lanes of traffic. It will be 4.6 km long and will rise 75 metres above sea level.

The bridge will be located 3 km north of Gatun Locks and the new post panamax locks on the Atlantic side and Thelma King Avenue in the province of Colon. Once completed, it will bring much-needed relief for neighbouring communities as it will ease the flow of vehicle traffic over the canal. **IN**

**BEYOND THE HORIZON
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OBSERVATIONS AND EXPECTATIONS OF AN EXPANDED CANAL

In about two years or less, after seven years of noise and dust, the industrial sounds of rock blasting, earth moving and the rumble of heavy equipment across the isthmus of Panama will go quiet and one of the largest construction projects on planet Earth will be at an end.

And when the hundreds of construction workers, engineers, surveyors and other construction specialists pack up and go home, they would have left behind the world's largest locks, capable of handling most of the world's biggest ships. They would have more than doubled the current capacity of the Panama Canal. What then?

The expansion of the Panama Canal, to be completed in 2014, will be a catalyst for changes to container distribution networks, especially those plying transpacific trade routes. The changes will be obvious and particularly noticeable at North American container ports and especially where there are intermodal connections. However, there are mixed views as to whether the expansion of the canal will significantly change the status quo between US West Coast and East Coast ports.

Nonetheless, changes in the all-water route deployments would result in repercussions on ports and intermodal carriers as I argued in my dissertation 'Cargo flow dynamics influenced by the expansion of the Panama Canal'.

“

The expansion of the Panama Canal will be a catalyst for changes to container distribution networks

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For my research, I used cargo owner-revealed preferences to estimate the aggregate economic effect of different port improvement projects that seek to attract redeployed containerships, especially the deployment of vessels with dimensions that exceed the current panamax limitations.

The transpacific route has two traffic flows. The eastbound leg moves greater volumes of traffic. The westbound leg has lower demand because of structural imbalances of trade between Asia and the Americas, resulting in lower vessel capacity utilisation (with loaded containers).

In the transpacific trade at present, the imbalance is substantial, with almost two loaded containers in the inbound US direction for every return container.

CONTRACTION

The Panama Canal expansion, by itself, will not generate new cargo. Therefore, the ability of the Panama Canal to accommodate larger ships will likely, at least initially, result in a contraction in the number of transits. So, as a result of the use of larger ships, fewer port calls will be made.

Container terminals are specialised facilities. They accommodate containerships and the intermodal vehicles that enable inland distribution. Terminal facilities include ship channels, berths, gantry cranes and storage yards. Attributes such as depth of the harbour, number of berths, number and capability of cranes, size of storage areas and intermodal access are factors which determine a particular terminal's strategic importance to its users. These various features collectively determine a marine terminal's capability to handle its throughput and invariably influence the marginal cost to a shipping line using a particular facility.

Container activity at US seaports has resulted in a concentration of vessel calls and container traffic in a few leading or

By
Dr. Eric Deans



pre-eminent ports. This is partly because of a tendency for larger and more specialised vessels to be drawn to ports that are best equipped. As a consequence, some container ports – such as Los Angeles/Long Beach, Seattle/Tacoma and Oakland on the US West Coast – are commanding a lion's share of the cargo and have evolved into dominant hubs. Along the eastern seaboard, ports such as New York/New Jersey, Savannah, Norfolk, Charleston and Baltimore are the container hubs in greatest demand.

Data was sourced from the Federal Highway Administration's Freight Analysis Framework (FAF3), which integrates freight movement data among states and major metropolitan areas by all modes of transportation. FAF3 reveals that up to 30 per cent of the Far East cargo transiting West Coast ports is destined for areas outside the natural hinterland of those ports. Most of the commodities transported in containers from Asia are time-sensitive consumer goods and other merchandise and would suffer from the time penalties imposed by an all-water route to the East Coast versus the competing West Coast routes. Therefore, a redistribution of market share of less than the maximum of 30 per cent from West Coast to East Coast ports is expected.

The deployment of larger vessels on transcanal routes will have an effect on Caribbean transshipment hubs such as Kingston, Freeport and Panama. These ports have depths of about 15.0 metres and the supporting infrastructure to handle ultra-large containerships. Draught limitations at East Coast ports could see carriers expanding transshipment options within the Caribbean to serve US trades in addition to South American trades. [\(8\)](#)

EXPANSION OF PANAMA CANAL AND CHALLENGES FOR CARIBBEAN PORTS

The global container shipping industry is the backbone of intercontinental supply chains, accounting for some 98 per cent of intercontinental containerised trade volume and 60 per cent of trade value.

In addition, the global shipping industry is driven by two forces of scale and technology and the Caribbean, comprising a group of small islands sharing space, is challenged to find relevance within this paradigm.

It is true that sustained globalisation and global logistics would not be possible without a dense and efficient transport network. It is equally true that both the concept of globalisation and global logistics and their enabling tools such as information technology and intermodal transport have had a tremendous impact on maritime transport. Both globalisation and global logistics trends beg the question: how does the Caribbean fit into this picture?

CHARGES

Given the poor performance of most container terminals in the Caribbean, it is not surprising that handling charges are two or three times as high as in similar ports in other regions and that the overall cost of transport and insurance in the Caribbean basin is some 30 per cent higher than the world average.

For example, the route from Shanghai (China) to Los Angeles (USA), a distance of 19,270 nautical miles, attracts a freight rate of approximately US\$ 700. By contrast, the distance between Kingston (Jamaica) and Oranjestad, Aruba, a distance of 513 nautical miles, attracts an average freight rate of US\$ 2,800.

However, for shipping lines specialising in container cargoes, the news has been especially bright for the anticipated increase in the size of ship equipped with modern technology. At least one shipping line, Maersk, believes the future looks bright. This news has led Maersk to order 10 of the world's largest-ever ships, with the first due for delivery in 2013 in anticipation of the opening of the Panama Canal.

Bigger ships also mean greater efficiency, but only if they can be filled to capacity. Industry analysts believe that more and more companies will try to reduce their carbon footprint for both public relations and profitability reasons. Industry analysts also point out that the vessel's enormous capacity will enable Maersk Line to move the greatest number of containers possible for its customers in the most energy-efficient way and with the smallest carbon dioxide footprint.

THE CARIBBEAN CASE SCENARIO

The Panama Canal is a major gateway for cargo moving from the Far East to the US West Coast and on to the US East Coast via the intermodal transportation network. In fact, the prospect for Caribbean transshipment involvement is integrally tied to the efficiency and competitiveness of the expanded Panama Canal. The following key drivers to transshipment will influence the highly coveted Caribbean hub port status:

- Port must be located at the crossroads of principal maritime trade routes
- Productivity of stevedoring operations
- Guarantee of berths
- Competitive tariffs
- Control of operations
- Safety and security
- Dedicated feeder services.

Major competing hubs within the Caribbean are Kingston, Jamaica; Freeport, Bahamas; Port of Spain, Trinidad and Tobago; Caucedo, Dominican Republic; Panama; and Colombia.

Sánchez and Wilmsmeier point out that the number of services and the number of directly connected ports describe well the embeddedness of terminals in the global network and simultaneously the potential for import and export development of the respective hinterland.

By

**Fritz Pinnock, Ph.D.
and Ibrahim Ajagunna, Ph.D.**

But connectivity alone is not sufficient to explain port throughput. While there is no doubt that containerisation is a necessary condition to increase trade in the Caribbean, its very presence does not guarantee that such development will occur. The reach of shipping networks from a country or port, however, shows potential trade opportunities. This is particularly true for smaller ports that rely on feeder and small vessel services. According to Sánchez and Wilmsmeier, these ports depend not on their direct connectivity but on the connectivity to a transshipment hub, which defines their integration in the global liner shipping network.

CARIBBEAN TRANSSHIPMENT TRIANGLE WITH HUB PORTS

Industry experts believe that the expansion of the Panama Canal is opening a new phase for transshipment in the Caribbean. According to Rodrigue and Notteboom, it is important to underline that, at global level, only 17 per cent of commercial relations involve direct connections between ports, so transshipment is a fundamental aspect of maritime shipping networks.

In recent years, an active transshipment market has emerged in Panama and the Caribbean, particularly within what has been dubbed the 'transshipment triangle'.

The growth in Caribbean transshipment activities is related to issues such as economic growth in Latin America – being at the crossroads of trans-Atlantic and north-south trade flows – and the need for shippers to reconcile, within their shipping networks, these many inbound and outbound trade flows.

Transshipment activities are thus a mix of hub-and-spoke network configurations as well as interlining between long-distance

shipping routes. The advantages gained in terms of network interconnectivity and better use of ship assets outweigh the additional handling costs that transshipment entails. According to Rodrigue and Notteboom, the expansion of the Panama Canal comes at a time in world trade developments that is prone to uncertainties, since the main trade drivers, such as North American import-based consumption, are being questioned while new trade relations are not firmly established. In addition, South America represents a remarkable potential for additional volumes and transshipment activities.

In the triangular transshipment hubs, local and regional carriers continue to play a major role in local trade, but are threatened by loss of global and some regional trade to alliances between operators. These global operators can offer more competitive prices when exploiting economies of scale. Local and regional carriers can only compete in service and not in price, as their advantages lie in close customer relations with preferences and flexibility in payments. Regional carriers, for example, are largely niche carriers specialising in LCL (less than container load) and mixed container loads and non-containerised goods, especially in the inter-island trade. Such services are specialised in handling cargo such as three boxes, three pallets or three containers. These types of handlings are very difficult for big operators as they do not fit in their rationale for cargo handling.

PORT SECTOR BOTTLENECKS

Port costs ripple right through national economies, especially those of small island-states. In fact, port costs affect the price of goods and services in nearly every sector of the economy. Competitiveness requires a modern, well-managed, cost-effective port system. While the standards of infrastructure in some Caribbean countries can be considered as acceptable, a major problem has been its maintenance. Other problems of infrastructure in the Caribbean are: inadequate management; tariffs that are too low to support the services; accumulated debt; and discontented customers. The state of the infrastructure is also affected by the Region's vulnerability to natural disasters and the tendency of governments to

make decisions concerning major investment projects without appropriate hazard assessment and information on mitigation measures.

Another challenge for infrastructure development in the Caribbean is government interference in the operation of public providers. The principle of institutional independence has been proposed to create creditworthy Caribbean public utilities, capable of financing themselves. This would entail legislative reform requiring, for example, rules for the naming of independent boards of directors; financial disclosure obligations; clear hiring practices; efficient and transparent public markets; and price-setting freedom for utilities, subject to compliance with the price review mechanism. It would also require the strengthening of local government through management training and enhancing the capacity of local governments to raise revenue. Another prerequisite is adequately trained staff to ensure effective compliance and enforcement of regulations.

The presence of an Appropriate Regulatory Framework is essential for private-sector participation in infrastructure projects. This would require the rewriting of national legislation and the upgrading of staff and their ability to enforce compliance with these regulations. For example, to manage infrastructure costs, human settlements should not be allowed to develop haphazardly without proper land-use planning. These settlements should be planned efficiently. Such policies have to be coordinated with other measures such as green taxes and development charges directed at major land users.

In port development, the importance of local and regional factors has to be considered and in various cases has produced unique frameworks which, in the worst case, impede strong collaboration with the maritime sector. The most important regional and local factors are the institutional operating and regulating framework and the financial environment for investments. A restriction on the development of maritime transport and port development, mentioned by several interviewees, is the lack of national infrastructure development plans and export facilitation policies. This impedes

the functioning of 'port communities', mixed consultative and deliberate entities, as in Montevideo, Hamburg and Barcelona.

The Caribbean needs to focus on training facilities not only in the maritime and port sector but also in the logistics sector. The lack of infrastructure development plans is also reflected in rising congestion in port-related automotive transport. The current situation in the bigger islands - Barbados, Jamaica and Trinidad and Tobago - reveals the need to integrate national port policies in national transport and infrastructure development policies.

According to industry analysis, other trends affecting Caribbean ports that have had a significant influence on the way port operations are planned, developed, operated, positioned and marketed include:

- Changing trends in production and consumption of goods and materials
- Changing patterns in distribution and trade transport
- Joint investment by port operators and private companies in various maritime activities, as is the case in Suriname
- Increasing cooperation among ports to share resources in capacity building
- Enhanced focus on security and safety
- Changing composition of port ownership
- Greater involvement of shipping companies in container port development
- Greater attention to handling bigger, more sophisticated ships carrying larger volumes of cargo
- Intense use of technology and IT applications to assist port operations
- More focus on improving tariff structure as a competitive strategy
- Introduction of value-added services and infrastructures
- More focus on intermodal linkages.

Experts have argued that these trends will continue to shape the planning, organisation, development, management and operation of seaports in the years to come. Port authorities and terminal operators will have to adjust their strategies, development and operations to suit the dynamics and realities



Challenges

of the port business and trade environment. They must pull all the stops to keep pace with trends and developments affecting the maritime sector, especially in areas such as shipping, intermodal transport, production, economics and trade.

In addition, port operators must gear themselves to accommodate the trend towards ship upsizing, which will require deeper draught, higher crane productivity to minimise berthing time and enable vessels to maintain their voyage schedule. Even the smaller ports should have plans in place to expand their capacity for the upsizing trend in ships.

RECOVERY

Given the signs of global economic recovery, the expanded capability of the Panama Canal will have a great positive impact on the Caribbean shipping industry. The Caribbean region is positioned to take advantage of this development. What will become necessary are the infrastructural

and logistical components, all essential if the region is to reap rich benefits. Key developments (along with the Panama Canal expansion) which will shape the future of the regional shipping industry are: the emergence of ultra large container ships; declining freight rates; overcapacity in the global shipping industry; and carrier consolidations.

According to Noel Hylton, both large containerships, declining freight rates, overcapacity in the global shipping industry and carrier consolidations will have tremendous impact on the industry going forward. In the short to medium term, however, the global economic climate remains highly volatile and uncertain.

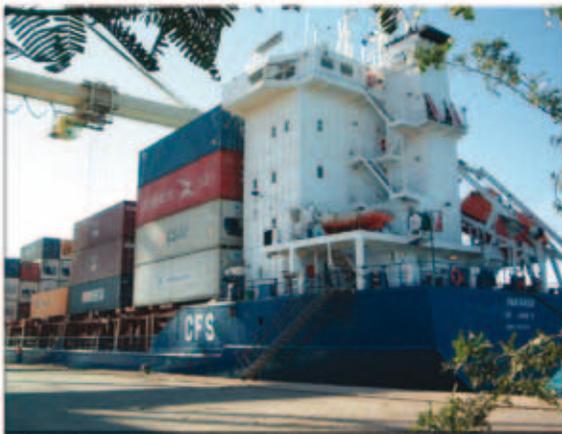
The Panama Canal Authority equally points out that the containership sector is the main driver of growth in canal traffic. Trade between North East Asia and the US East Coast reflects the highest canal transit growth rate and will become an important driver of canal growth.

Finally, the Panama Canal expansion will impact the regional shipping industry because of the increase in the size of ships it handles. Ships in the 4,000 to 8,000 teu range will be plying the north-south trade routes with more vessel-sharing agreements being formulated to pull service volumes together; and continued growth and expansion of transshipment ports across the Caribbean. 

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GRAPEVINE*

JAMAICAN GOVERNMENT PLANS DEVELOPMENT FOR KINGSTON

Anthony Hylton, Jamaica's recently appointed Minister of Industry, Investment and Commerce, announced in February plans for development of a 'global shipping and logistics hub' for Jamaica.

According to a leading Jamaican newspaper, this is to be the 'flagship project' of his ministry. Mr. Hylton said his main role would be to find the necessary capital and investors. He said the project's five components would be attractive to investors given the expansion of the Panama Canal.

The Minister said he had already received expressions of interest from potential investors in the Persian Gulf for the development of the hub, which he said could position Jamaica as the logistical centre for trade in the Americas.

The five elements are:

- Dredging of Kingston harbour and expansion of port facilities
- Establishment of a dry dock facility at Jackson Bay, Clarendon
- Bunkering facility at Cow Bay in Yallahs, St Thomas
- Construction of a cargo and maintenance, repair and operations facility at Vernamfield in Clarendon
- Development of the Caymanas Economic Zone (CEZ).

All five projects are carry-overs from previous government administrations.

Panama Canal Authority sets records

The Panama Canal Authority (ACP) posted a number of records in its 2011 fiscal year, ended September 30.

The reason was a continuing growth in tonnage moving through the canal and higher tolls, particularly for containerships.

In financial year 2011, a record total of 322.1 million Panama Canal Universal Measurement System (PCUMS) tons was moved through the waterway, up just over seven per cent on the 300.8 PCUMS tons moved in 2010 and almost three per cent on the ACP's previous record achieved in 2007.

Notable was the strong rise in panamax ships using the canal, accounting for over 53 per cent of all transits recorded in FY 2011.

Container tonnage in FY 2011 amounted to 113.7 million PCUMS tons, equivalent to 35 per cent of the total. It generated US\$ 873.7 million of the ACP's total revenue of US\$ 1.7 billion from tolls. Overall, the ACP registered a turnover of US\$ 2.28 billion in 2011. Net income was US\$ 1.21 billion - a 27.5 per cent jump in earnings compared with 2010. As a result, the company's profit margin rose from 48.9 per cent in FY 2010 to 53 per cent last year.

**GRAPEVINE documents reports which have appeared publicly, in the news and circulated on the internet, so as to provide a historical context for the articles appearing elsewhere in this publication. The Caribbean Shipping Association, Caribbean Maritime and Land & Marine Publications Ltd do not endorse these reports, neither do we take responsibility for their accuracy.*



Panama Canal: new schedule

The Panama Canal Authority (ACP) has received a new schedule from its construction consortium for completion of the new locks, according to the Journal of Commerce (April 4, 2012).

Quoting Jorge Quijano, the engineer in charge of building the third set of locks, the Journal of Commerce said the new locks would probably not be ready for their scheduled opening in October 2014 but would be ready for a trial run by a vessel in December.

The change in the opening date of the new locks is said to be related to the concrete, which according to the specifications is required to last for at least 100 years. The new schedule for completing the work specified in the \$3.2 billion contract has reportedly indicated that all the work will not be completed until April 2015, six months after the target date for the opening of the new locks in October 2014. However, the new schedule includes work on such elements as parking lots and building that are not essential to the new locks.

The locks are expected to be ready for testing in October, but not for full operation. According to the Journal of Commerce, Mr. Quijano will become the ACP's new administrator on September 4, succeeding Alberto Aleman Zubieta.

ERIC DEANS COMPLETES STUDY

Eric Deans, director of shipping and policy research at the Maritime Authority of Jamaica (MAJ), has returned to Jamaica after completing a PhD in marine policy at the University of Delaware last autumn.

Dr. Deans conducted research on cargo flow dynamics - in particular, how containerised traffic is impacted by the Panama Canal expansion. Since Jamaica is strategically located close to the Canal, the research provides up-to-date insights that could allow Jamaica to capitalise on maritime opportunities with North America, South America, the Caribbean and Asia.

The research analysed shippers' preferences for ports and designed a model that could be used to prioritise investments in ports.

In addition, the strong environmental component of the academic programme provided support for Dr. Deans' participation as a delegate to the IMO's Marine Environment Protection Committee. He was appointed Jamaica's representative to the committee.

Dr. Deans served as a member of the IMO Expert Group on market-based measures to reduce ship emissions. He was the author of a proposal to reduce greenhouse gas emission from ships through port-state control measures. This proposal was presented by Jamaica at the 62nd session of the Marine Environment Protection Committee.

Caucedo set for Panama Canal expansion

DP World's Caucedo Multimodal reportedly announced on March 15 that, as of March 22, the international shipping lines NYK, Hanjin, Evergreen and Hyundai Merchant Marine would be using the Dominican Republic as a transit operations centre for container shipments between North and South America.

As reported in El Caribe, the port is preparing to make the most of the completion of the Panama Canal expansion in 2014. Located east of Santo Domingo, the facility now handles about 25 containerships a day or about 1,300 ships a year. It has a sophisticated security system, with over 100 cameras and motion-activated sensors.

More than US\$5 million has been invested in security measures, according to the report. The port has an annual handling capacity of 1.25 million teu. An expansion completed in 2011 has increased its capability by 300 metres of deepwater berth and equipped it with two new mobile cranes in addition to the existing five post panamax gantry cranes. The port now has three deepwater berths with a total length of 922 metres and 13.5 metres depth alongside. The terminal covers an area of 50 hectares with storage space for 30,000 containers.

Montserrat port back in operation after 15 years

The government of Montserrat is giving sand miners who ship through the reopened Plymouth Port a 50 per cent reduction on export charges.

This was announced by Premier Reuben Meade through the Government Information Unit. Shamrock Industries Ltd coordinated the shipping of 3,000 tons of sand from the once abandoned port, now part of the country's Exclusion Zone.

Nigel Osborne, owner of Shamrock Industries, said three companies had taken up the government's invitation to ship sand *via* the pier, which has been out of use since the eruption of the Soufriere Hills volcano over 15 years ago.

Premier Meade said the first day of shipping had gone smoothly and he praised the public and private partners for their joint efforts. He said that use of the port would allow the sand mining industry to continue uninhibited by the increase in roadworks in the north of the island.

Previously, miners had to take the sand from Belham Valley to the port at Little Bay. That has been put on hold as roadworks begin in earnest from Salem to St John's. A weight restriction has also been imposed for trucks, limiting the quantity of sand that can be carried on the main roads.

In November 2011 the Scientific Advisory Committee lowered the Hazard Level from three to two, thus allowing daytime access to the Exclusion Zone.

New head of SAL appointed

Security Administrators Ltd (SAL), leading provider of maritime security in Jamaica and, specifically, in the Port of Kingston, has appointed a new managing director.

Captain George Reynolds, who previously served as Colonel Adjutant Quartermaster of the Jamaica Defence Force, has over 30 years of experience in the military. He takes over from Captain John Ulett, who retired in September 2011.

Port Authority of Jamaica wins again

The Port Authority of Jamaica (PAJ) was awarded the 2011 'Best Local Initiative' prize by Cruise Insight Magazine for the Historic Falmouth Port project.

The PAJ received the award in March this year at Cruise Shipping Miami - formerly Sea Trade Miami - regarded as the world's largest cruise convention.

At the convention, the PAJ signed a sisterport agreement pairing Jamaica's Historic Falmouth Port with the UK port of Falmouth, in Cornwall.

CMI SIGNS PACT WITH FRENCH INSTITUTE

The Caribbean Maritime Institute (CMI) has signed a memorandum of understanding (MoU) with the Port Institute for Education and Research (IPER), an integral part of Ecole de Management de Normandie in Le Havre, France.

The alliance with the French institute is part of the CMI's quest to remain relevant in meeting the needs and expectations of the maritime and land-based shipping industry of the Caribbean and the world. The MoU seeks to build cooperation in the following areas:

- Organisation and development of executive training programmes
- Joint research and development projects
- Joint consultancy projects
- Faculty and student exchanges.

The agreement was signed on March 8 by Dr. Fritz Pinnock, executive director of the CMI; Hendrik Lohse, executive director of IPER; and Jean-Guy Bernard, director general of Ecole de Management de Normandie.

In addition, the institutions plan to access financial support for joint projects from the International Maritime Organisation (IMO), the European Commission and other third-party funding bodies.

Dr. Pinnock had previously taken part in a series of meetings sponsored by SEFACIL Foundation in France, during Applied Research Week. The principal aim of these meetings was to strengthen ties in the areas of applied research and port/maritime studies.



Managing change: 25 BILLION – NOW WHAT?

On February 13, 2012 the computer giant Apple launched a promotion, offering a prize to the person who downloaded its 25 billionth application. So, downloading an app to an iPhone, iPad or iPod Touch gave the purchaser a chance to win. The prize? A \$10,000 Apple Store gift card.

For the few who may not know, 'app' has become the popular abbreviation for 'application'.

In less than one month, on March 5, Apple's home page read: "A billion thanks, 25 times over – the App Store has reached 25 billion downloads. Thanks for getting us there."

Wow! Congratulations to Apple and to the winner of the \$10,000 gift card. To reach 25 billion of anything is nearly beyond comprehension. Ten

to the ninth power; nine zeros after the one; 1,000 millions; or, in computer parlance, just a bit less than a 'gig'. Off the charts?

Let's relate this to real-world numbers. It is roughly the income of the Christy Walton Family (Wal-Mart). Or, according to Bloomberg Billionaires Index, nearly half the income of Microsoft's Bill Gates or Warren Buffett.

MAGNITUDE

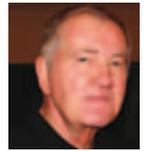
Regardless of the number of zeros, the magnitude of this accomplishment (that is, selling 25 billion units) is far-reaching and of serious implication. In his 2000 best seller 'Tipping Point: How Little Things Can Make a Big Difference', Michael Gladwell posits that a single event, with scale, changes a culture.

Indeed, we have a tipping point ... tipping towards a new model for computing, digital content, software and the web. Not surprisingly, tipping points are without borders.

In previous issues of **Caribbean Maritime**, I offered forecasts of the "next new thing and next new think" under the Janus View₁, and Eleven Ways to Cope with Future Shock₂ rubrics. In these columns I cited apps as technology markers for change.

While new to some, this growing model is transitioning the way our lives and our businesses are conducted. This transition began on March 6, 2008 when Apple made available a tool kit for third-party independent software developers to make apps for its iPhone. At record pace apps affordably engaged the user, the retail customer. Of the hundreds of thousands of apps now available, half are for free or cost between US\$5 and US\$9. Gradually, and in the very near future,

By
Joseph Cervenak



apps will likely migrate to the enterprise level and become quite an ordinary part of our computer systems – likely our smartphone computer-in-our-pocket. Of note, Microsoft app is included in the new Windows 8 operating system.

WHAT DOES ALL OF THIS MEAN FOR OUR BUSINESSES?

This is less about apps than it is about our leadership and our ability to effect changes in our companies. And changes, ultimately, are manifested as our future success or failure.

The Apple app event was not an accident. Offering tool kits to developers was deliberate. There was strategic intent. By extension, it offered its customers the opportunity to create their own value and ultimately to create a business system

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Of the hundreds of thousands of apps now available, half are for free or cost between US\$5 and US\$9

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allowing them to do more, do better and at less cost.

For us, this is a time for rigorous self-examination of our value offerings and value-creating systems – that is, if we have such. And it is an examination of how we run our business. No, this is not external nor a macro factor. This is pervasive and close to the vest.

The inscription 'Know Thyself' at the Temple of Apollo at Delphi and so often posited by Socrates some 2,500 years ago, never rang so true. We need to develop plans to achieve forward-looking accomplishments and do so (most likely) by changing and reshaping our business model.

While we may hope for charts with slopes that are gradual linear regressions and predictable, our preference for change is three or four years away. While we would like to live in 2015 and 2016, visualising the future so we can anticipate and solve today's problems, it simply is not in the calculus. Our actions today demand that we set a strategy emanating from the challenges and changes of our time and grasp the big picture. (Read: innovation, creativity, developing people and technology.)

According to Henry Mayers Hyndman, author of 'The Evolution of Revolutions': "Leadership ... is about coping with change ... leading an organisation to constructive change begins by setting a direction." And, if I may add, ours is to set forward-looking strategy that is grounded in today's reality while making necessary change and guiding our people to above-the-bar accomplishments.

Jim Irsay, owner of the American football team Indianapolis Colts, understands this reality. Does he pay the \$28 million

roster bonus to NFL quarterback Peyton Manning or let Manning become a free agent? "When you are younger, you think there's a wise man behind that door with a white beard, and you can go see him and he'll tell you the answers," Irsay said. "But that man is not there." He goes on: "Continuity is a great thing: staying the course and being patient, those are important virtues. But, also, there is virtue in being realistic enough to know you have to make serious changes sometimes."

FUTURIST

Consider Tom J. Frey, Google's top-ranked futurist and host of FuturistSpeakers.com where he writes of '28 Major Trends for 2012 and Beyond': "Our vision of the future creates our actions today." He adds: "This is a period of extreme chaos and also a period of extreme opportunity ... we are in a very fluid changing world." However, prudence suggests we acknowledge that our world is still coupled to an ever-so-slow recovery from economic crises.

To this point, Lynda M. Applegate, Martin Marshall Professor of Business Administration at Harvard Business School, extolled in her article entitled 'Sharpening Your Skills: Leading Change' (HBR newsletter June 6, 2009): "An economic crisis is a charter for business leaders to rewrite and rethink how they do business."

The key, Ms. Applegate advises, is: "Don't think retrenchment; think growth." Her key concepts are to identify and exploit innovation; to rethink offerings, markets, business processes and organisational structure; and to create innovative new offerings.

Interestingly, albeit with tongue in cheek, we have identi-

fied two opportunities: one from the ongoing economic crisis and one from providing a channel to the customer for ongoing value-creating activities.

WHAT TO DO WITH THESE OPPORTUNITIES?

We begin by acknowledging that change is an engineering process that replaces the fundamental nature of an institution. Alternatively stated, we are re-engineering our company – yes, once again, and thank you Messrs Hammer and Champy.

Further, we need to move to the fore the effort of re-examining our mission, confirming our vision and validating our purpose. Without doubt we are challenging our very being: the business model of today, and this, of course, is frightening. However, or as Mike Jarrett is fond of adding, the "sobering thought, however", is that it may not work for tomorrow. As such, we might have to move quickly and far from our core business model.

In contrast, if after examination we decide to effect change and innovate before we have to, thus avoiding the shroud of urgency that diminishes our options, we are then able to develop alternative strategies and embark on incremental adventures. Make changes, take on initiatives that are inconsequential but not life threatening – think accretion.

Another 'however', this time a caution as put forth by author Scott Anthony referencing Kodak, which filed for Chapter 11 (bankruptcy) protection on January 19, 2012: "Even an insightful company can go wrong if it doesn't push far enough, fast enough into uncomfortable territory."

No need to read tea leaves; instead, we need to develop new and better systems to regulate,

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This is less about apps than it is about our leadership and our ability to effect changes in our companies

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manage and leverage the activities surrounding them. And, in the light of new experiences, re-examine, re-examine and act.

All such said, where will we be when we realise everything has changed? For Apple, with rumoured release of iPhone 5, 'the new' iPad, Macbook Air and 25 billion downloads; and, crossing the \$500 billion mark, 2012 is a banner year — Apple's *annus mirabilis* – a miracle year.

"It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change." – Charles Darwin. 

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CHANGING AN ORGANISATION'S CULTURE FOR SURVIVAL

The 1980s saw increased attention paid to organisational culture as a key determinant of success. During this period, experts argued that developing a strong organisational culture was essential for success.

According to these experts, while the link between organisational culture and organisational effectiveness is far from certain, there is no denying that every organisation has a unique social structure. They argued that these social structures drive much of the individual behaviour observed in organisations.

Organisational culture can be viewed at three levels based on manifestations of the culture in tangible and intangible forms.

At the first level, an organi-

sational culture can be observed in the form of physical objects, technology and visible forms of behaviour. For example, people may interact with one another, but what the underlying feelings are, or whether there is understanding among them, would require some probing.

CULTURAL VALUES

At the second level, there is greater awareness and internalisation of cultural values in which people in an organisation try solutions of a problem in ways which have been tried and tested in the past. If the approach is successful there will be shared perception of that 'success', leading to cognitive changes. Perception turns into values and beliefs.

The third level represents a process of conversion, when a group repeatedly observes that the method that was tried earlier works most of the time. This then becomes the 'preferred solution' and gets converted into underlying assumptions.

These three levels range on a scale from 'superficial' to 'deeply embedded'. And, as cultural symbols get converted to 'shared assumptions', they move from a superficial level to a real internationalised level.

INEVITABLE

Nevertheless, change is inevitable and changing the organisation's culture is always one of the toughest tasks an executive officer will ever take on. It is important to note that an organisational culture is formed over years of interaction between the individuals in the organisation. Therefore, changing the accepted culture can feel like rolling rocks uphill. Organisational cultures are formed for a reason. Perhaps the current organisational culture matches the style and comfort zone of the company's founder or its CEO. In the Caribbean shipping industry, where companies are predominantly family owned, managers tend to hire people just like themselves.

By
Fritz Pinnock



The established organisational culture is therefore reinforced by new employees.

THREE SIGNIFICANT STEPS

It is sometimes argued that, for people to consider a change of an organisation's culture, a significant event must first occur. An event such as bankruptcy or a significant loss of sales and customers may awaken people to a need for change. Even then, recognition that the organisation's culture is the cause and that there is need for change is not always readily understood or accepted. Even if it is, the initial steps towards change are difficult to take. The following are three significant steps to changing an organisation's culture:

1. Before an organisation can change its culture, it must first understand the current culture.
2. Objectives of the new culture must be clearly defined. Identify where you want to go and what the organisational culture should look like to support success. Then, map the strategy and direction. Questions pertaining to what vision the organisation has for its future and how should the culture change to achieve this should be resolved.



Change is inevitable and changing the organisation's culture is always one of the toughest tasks an executive officer will ever take on





3. Finally, the individuals in the organisation must decide to change their behaviour so as to create the desired organisational culture. This is the hardest step in culture change.

BUILDING A TEAM CULTURE

Fostering teamwork will ultimately create a culture that values collaboration. In such an environment, people understand and believe that problem-solving, planning, decision-making and planned actions are better when done cooperatively. People recognise, and even assimilate, the belief that “none of us is as good as all of us”.

TEAMWORK

It's hard to find workplaces that exemplify teamwork. In the Caribbean, for example, institutions (such as schools), family structure; sport and pastimes emphasise winning; being the best and coming out on top. Workers are rarely raised in environments that emphasise true teamwork and collaboration. One can, however, create a teamwork culture by doing just a few things right. Admittedly, they're the hard things; but with commitment and appreciation for the value, you can create an overall sense of teamwork in your organisation.

To make teamwork a reality, the following powerful actions must occur:

1. Leaders communicate from the top the clear expectation that teamwork and collaboration are expected.

2. Leaders model teamwork in their interaction with each other and the rest of the organisation.

3. The organisation's members talk about and identify the value of a teamwork culture.

4. Teamwork is rewarded and recognised.

5. Important stories and folklore that people discuss within the company emphasize teamwork.

KEYS TO TEAM BUILDING

1. Provide training in systematic methods so that the team expends its energy on the project, not on figuring out how to work together as a team to approach it.

2. If team members are not getting along, examine the work processes they mutually own. The problem is not usually the individual personalities of the team members. It may be the fact that the team members often have not agreed on how they will deliver a product or a service or the steps required to get the problem solved.

3. Take the team to a sporting event. Sponsor dinners at a local restaurant or in the office. Go to a movie. Hold a monthly or quarterly company meeting. Sponsor sports teams and encourage team support.

What these keys suggest is a set of value systems that are shared equally by all the members of a team. These sets of values take a long time to evolve but when achieved are sustained over a long period. They become the nucleus around which consensus can be built. 

* Dr. Fritz Pinnock is Executive Director of the Caribbean Maritime Institute

Climate change, policy and the Caribbean Sea

(a Jamaican initiative)

On December 29, 2011 Jamaica's Portia Simpson-Miller led the People's National Party to an emphatic general election victory. On January 5, 2012 she was sworn in as the seventh Prime Minister of Jamaica.

Just hours after her swearing in, the new Prime Minister announced her Cabinet. Interestingly, she announced Robert Pickersgill as Minister with portfolio responsibility for water, land and the environment. Of note, however, was the nomenclature of the 'new' Ministry. It was designated the Ministry of Water, Land, Environment & Climate Change.

THEME

Climate change? Really? What was the Most Honourable Prime Minister thinking?

One may be forgiven for thinking that my introduction is irrelevant to the theme of this issue of **Caribbean Maritime**, 'Ports and Terminals', and must have nothing to do with law. But let us look deeper.

Surrounded or bordered by the Caribbean Sea or bordered by the Atlantic Ocean, Carib-

By
Milton Samuda



bean and Central American territories, their governments and ports must be concerned about the issue of climate change and its potential impact on seaports.

All the results of climate change – the rise in global temperatures, the resultant glacier melt, the rise in sea levels, increased flooding, storms of greater intensity, stronger and more frequent storm surges – have real implications for

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Policymakers must realise that the implications actually start outside of our ports
”



our ports. In a region already vulnerable to tropical depressions, storms and hurricanes, Caribbean ports must prepare to mitigate and manage the consequences of climate change. Bear in mind that the Caribbean Sea supports three vital industries: sea transport, fishing and tourism.

CLIMATE CHANGE AND THE LAW

Policymakers must realise that the implications actually start outside of our ports. Climate change has an impact on, for example, agriculture (affecting yields) and on road and rail transport (affecting usage), thus ultimately affecting the delivery of cargo to ports. The need to be proactive will result in the re-enforcement of structures and adjustments to inland infrastructure, all in an effort to respond to the growing appreciation of the risks posed by climate change and the need for adaptation.

Against that background, the preparation to mitigate and manage, and to recognise and adapt, must include matters of law – treaty arrangements,

statutes and regulations – which frame a united response, coordinated across, at the very least, the Caricom territories. Legal details to be addressed, I suggest, should embrace, at the regional, and maybe hemispheric, level, a coordinated response to climate change, building on the work already done by organisations such as the Association of Caribbean States (ACS), particularly its Caribbean Sea Commission.

RESOLUTION

The work of the ACS towards having the United Nations declare, by resolution, the Caribbean Sea ‘a special area for sustainable development’ not only recognised the potential impact of climate change on ports and low-lying coastal areas but also the critical importance of the three industries – shipping, fishing and tourism – to the ACS countries of the Caribbean and Central America. Treaty obligations should reflect the threats of climate change. They should set new standards for shipping and for the use of the Caribbean Sea. Governments throughout

the region should collaborate in identifying funding for mitigation and adaptation responses and should agree on the criteria for access to treaties.

REAL, PRACTICAL ISSUES

At municipal level, the necessary statutes and regulations must be updated in order to provide for: (a) an approach to the provision of catastrophe insurance; (b) the tax treatment of the additional expenditure necessarily made by ports in response to climate change mitigation and management; and (c) the regulation of safety and other issues concerning the movement of cargo to port, the storage of cargo on port and the loading/discharge of cargo.

It is clear that the law will have to respond through the lens of concepts such as *force majeure*, negligence, foreseeability, reasonableness, insurability, liability, responsibility, loss and damage. Ultimately, case law will develop from actual claims and will assist shipping and other interests in interpreting their own place in this specific part of an ever-changing world.

These are not esoteric or philosophical matters discussed against the background of a rash and baseless theory. They are real and practical issues born of a scientifically confirmed phenomenon with which our region must grapple for solutions.

POLICY AND NEED FOR ACTION

At a press briefing following his attendance at the 17th Conference of Parties (COP) to the United Nations Framework Convention on Climate Change in Durban, South Africa (November 28 to December 10, 2011)

Minister Pickersgill announced the formation of a department within his Ministry to deal exclusively with climate change. He said Jamaica intended to access financing under the Convention’s Climate Change Adaptation Fund. He said Jamaica would embark on a programme of adaptation in response to the effects of climate change.

RECOGNITION

Mr. Pickersgill’s statements indicated a recognition of the importance, if not yet urgency, with which a response to climate change must be made. Against the background of a languishing Kyoto Protocol and Jamaica’s suffering of hurricane and storm damage in excess of US\$1.4 billion over the last eight years, Mr. Pickersgill said: “As Jamaicans, as a government and as a ministry, we cannot but respond to the new challenges being posed by climate change since our survival depends on it.”

CONCLUSION

Whatever the Jamaican Prime Minister was thinking, it was strategic and timely. The recognition by Prime Minister Simpson-Miller of the threat, her open acknowledgment of the need to address that threat, and her inclusion of the words ‘climate change’ in a named Ministry, are exemplary. She has sent a clear message to the region and has, in the process, struck a blow for the protection of the natural environment and for the commerce, livelihood and indeed national development, so heavily dependent on the Caribbean Sea. 

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



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Martinique

French west
indies



Growing towards
“EXCELLENCE”



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PREVENTING THE UNEXPECTED: SOLVING PROBLEMS BEFORE THEY CAUSE PROBLEMS.

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