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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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Caribbean Shipping Association

4 Fourth Avenue, Newport West,
PO Box 1050, Kingston CSO, Jamaica
Tel: +876 923-3491

Fax: +876 757-1592

Email: csa@cwjamaica.com

www.caribeanshipping.org



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www.landmarine.com

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FROM THE CSA PRESIDENT



caribbean shipping association

Towards a Sustainable Future in the Shipping Industry



Juan Carlos Croston
President
Caribbean Shipping Association

The trail of devastation and casualties left by Hurricane Dorian has cast a sombre mood over the region, as the people of Abaco and Grand Bahama islands continue to pick up the pieces and rebuild their lives in the aftermath of one of the most powerful Atlantic hurricanes of modern times. Described by Bahamian Prime Minister Hubert Minnis as “a historic tragedy”, the images and videos of the extensive damage sustained by the island are truly heart-rending.

On behalf of the CSA, I offer my deepest sympathy to everyone affected by this disaster. The US and British Virgin Islands, as well as Puerto Rico, were largely spared any catastrophic damage, and for that we are collectively grateful. As we have consistently and unhesitatingly done



in the past, the CSA will support the hurricane recovery efforts in any way we can. It will take some time to restore normalcy in the worst affected areas, but by working together we can demonstrate to the world that while the gale force winds may have bent our spirits, we are not broken.

At the time of writing, Hurricane Dorian was tracking along the coastline of the southeastern United States and posed a potential threat to Florida, Georgia, and



the Carolinas as a Category 3 storm. At its peak, Dorian was a Category 5 super storm that registered maximum sustained winds of 185 mph/295 kph and etched its name into the meteorological record books. The recent trend of powerful and destructive hurricane seasons is hard to ignore, and 2019 marks the fourth year in a row the Atlantic basin has witnessed at least one Category 5 hurricane.

The balance of scientific evidence

suggests that the increasing intensity and frequency of these extreme weather events is, to a considerable degree, linked to global warming. Greenhouse gas emissions have caused the sea surface temperature of Caribbean waters to rise significantly, creating an ideal setting for storms to intensify. While the shipping industry enjoys the reputation of being the most energy-efficient way to move large volumes of cargo, the prevalent use

The balance of scientific evidence suggests that the increasing intensity and frequency of these extreme weather events is, to a considerable degree, linked to global warming

of heavy fuel oil generates a considerable amount of harmful carbon dioxide emissions as well as air pollutants such as sulphur dioxide, nitrogen oxides and particulate matter. These pollutants pose a great danger to human health, particularly along key shipping routes.

EMISSIONS

According to the International Council on Clean Transportation (ICCT), the global shipping industry is responsible for about three per cent of total global greenhouse gas emissions per year. The International Maritime Organization (IMO) estimates that at the current rate, shipping emissions will increase by 50 to 250 per cent by 2050. In an effort to reduce the shipping industry's carbon footprint, the IMO is leading a global approach to cut emissions generated by shipping by 50 percent below 2008 levels by 2050. It is also implementing the "IMO 2020" rule, which will mandate that ships reduce the sulphur content in their fuels from 3.5 per cent to 0.5 per cent as of January 2020.

These initiatives and regulations will call for urgent changes that require the



The future of the shipping industry must be a sustainable one, where health, environmental and natural disaster risks are aggressively mitigated

use of existing technology to improve the efficiency in construction and operation of ships. This will not be an easy process and there will be issues with compliance and enforcement, as well as economic ramifications. However, the resulting benefits will be undeniable and absolutely worth the effort and investment. The future of the shipping industry must be a sustainable one, where health, environmental and natural disaster risks are aggressively mitigated.

COMMITTED

The CSA has always been committed to reducing the vulnerability of the region to marine pollution. This has been most recently evidenced by our ongoing work with the Caribbean Marine Environment Protection Agency (Caribmepa), which was launched during our Executives' Conference in Kingston, Jamaica earlier this year. Through the signing of a MOU

with Caribmepa, the CSA is affirming its support of the initiatives and agenda to protect the Caribbean Sea. We are also proud of our cooperation with the Maritime Technology Cooperation Centre (MTCC) Caribbean, and we recently participated in its regional workshop in Trinidad on "Capacity Building for Climate Mitigation in the Maritime Shipping Industry".

Our upcoming 49th Annual General Meeting, Conference and Exhibition scheduled for October 6 to 9 in Punta Cana, Dominican Republic will present us with the opportunity to further the discussion on environmental issues facing the shipping industry.

I am keenly anticipating the segments on "Oceanic Awakening: Sustainability and Stewardship Actions" and "Climate Change: Game Changer for Caribbean Ports". This important forum will also facilitate an interchange of ideas on

pertinent topics such as commerce, port management, logistics, digitalization and cyber-security.

DIALOGUE

For anyone who is interested in solution-oriented dialogue and the future progress of the regional shipping industry, this event should not be missed. I look forward to the fruitful deliberations and warm hospitality that await us in Punta Cana.



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HAINA INTERNATIONAL TERMINALS (HIT)

Rio Haina Port is the Dominican Republic's busiest multipurpose port and handles just over 60 percent of the nation's maritime trade including both containerized and break bulk cargo. It is operated by Haina International Terminals (HIT), a private port operator that aims to manage and develop Rio Haina Port. Over the last 10 years, HIT has invested over USD 120 million upgrading the port's infrastructure, technology, safety and security.

Being located in Santo Domingo, Rio Haina Port represents a logistical advantage for local importers and exporters as the biggest industrial and medical free and productive zones are established around the port. The terminal comprises 15 berths totaling 2,880 meters of length. It specializes in the handling of containers, petroleum products, steel, lumber, automobiles and general cargo. The port has a 13.8 meter deep access channel and maximum alongside draft of 12.5 meters.

The port is equipped with three ship-to-shore gantry cranes of up to 48 tonnes capacity and able to undertake an average 25 moves an hour per crane. HIT has two mobile cranes of up to 100 tonnes capacity and is about to receive two new Panamax ship-to-shore gantry cranes of up to 55 tonnes capacity.

In 2018, HIT handled 423,000 TEUs plus 32,000 vehicles and 5.7 million tonnes of breakbulk cargo. For 2019, HIT is forecasting 438,000 TEUs, 34,400 vehicles and 6.2 million tonnes of breakbulk.

A stellar career that's far from over



After a stellar career spanning 31 years with the Panama Canal Authority and during its transition from US to Panamanian control, **Capt Orlando Allard** saw life on the waterway as a towboat master, pilot and later as a senior administrator. Here, Capt Allard reflects on a career that's far from over.



Capt Allard has also been Panama's representative at the IMO in London and at the very heart of more than one of its Conventions, co-founded an International Maritime University, been dean of Panama's oldest university and the general go-to person when decisions needed taking and jobs needed to be done.

But rather than sitting back and enjoying life, Capt Allard is as busy as ever receiving awards that reflect his lifetime of achievement, sitting on key boards and imparting his extensive knowledge and expertise to a new generation in the maritime sector.

Q. Where were you born and where did you grow up?

A. I was born in the Province of Chiriquí, Republic of Panama. I grew up in Chiriquí and in Panama City and then in the US.

Q. What was your life like growing up?

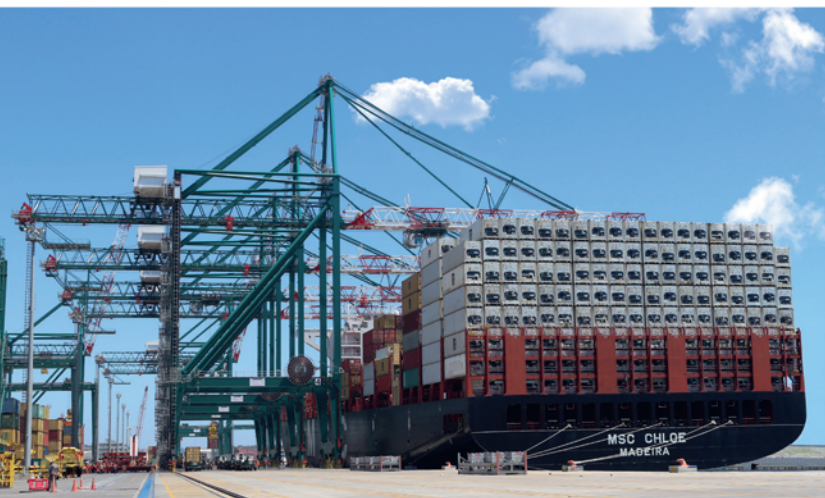
A. I grew up in the middle of a large-extended family and was very much loved. They had high hopes for my future since I was the first grandson of the family on my father's side. Growing up I dreamed of traveling all over the world. I was very much into learning about the great cities of the world.

Q. How about your education? Where did you go to school and then to university? In which subject(s) did you graduate?

A. I graduated from a public high school in Chiriquí. I then graduated from the University of Panama with a major in Teaching of English as a Second Language.

Once I graduated in Panama, I attended the Massachusetts Maritime Academy and obtained an engineering degree in maritime transportation – and a third officer's license.

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Q. What originally attracted you to the maritime sector? Was this something you were always interested in when you were growing up?

A. What attracted me the most in a maritime career was the possibility of traveling all over the world, visiting the great cities of the world and getting to know people from other cultures. As a ship's officer and later on as a pilot in the Panama Canal I had the opportunity to travel and fulfil my dream of traveling all over the world.

Q. What was your first job upon leaving education?

A. Towboat Master in the Panama Canal.

Q. When did you join the Panama Canal Authority, an organization for whom you later worked for 31 years.?

A. I was hired as a towboat master by the Panama Canal Company in 1978. Later on, I was promoted to the pilot training program where I reached the senior level. I was in charge of the maritime training programs for the Canal Authority. I retired in 2008.

Q. What do you remember most of your time at the Canal Authority, first as a towboat master and then as a pilot?

A. The great satisfaction of being

involved in the training of maritime personnel, particularly towboat masters and pilots – new Panamanian young professionals who joined the Panama Canal, which helped us achieve a 100% Panamanian work force in the maritime areas. We were able to implement simulator training for pilots – the first in the world. The marine simulator technology was very much influenced by the Panama Canal and our experience in using simulation as a valuable tool for training officers, towboat masters and pilots.

Another highlight of my career at the Canal was being in charge of designing the technical training program for the thousands of people who would work there. To do this, however, it was necessary to get as involved as possible in the planning stages of the engineering project itself since we needed to know the different trades and the number of people in each category. Training programs had to be designed and find places where participants could get involved in practical training.

Q. You spent three years in London as Ambassador, Permanent Representative to the International Maritime Organization (IMO) during 2000-2003. What do you recall of your three years based in the UK and working with the IMO?

A. Living in London was one of my dreams – and, of course, representing Panama at IMO was a most rewarding experience. I was there during the security crisis that followed the Twin Towers attacks in New York City and the development of the maritime and port security code that was developed at IMO. I was very much involved in

at least two other international conventions that had a large impact on shipping and Ballast Water and the TBT Convention are a few examples.

Q. On your return to Panama, you then co-founded the International Maritime University and was appointed as its first Rector (2006-8). This must have been a major challenge. How difficult was it to get such an institution off the ground?

A. I had a lot of help from the local maritime community – and a great push from my Alma Mater, the Massachusetts Maritime Academy – and the other maritime academies in the United States. They all pitched in providing maritime experience aboard their training ships. The Panama Canal Authority also helped a great deal – as well as the Canal pilots and maritime personnel in general. The Government of Panama, through the vice president, a maritime lawyer himself, helped us sailing through the administrative nightmares in the public sector.

Q. You are also president of the Private Sector Council for Educational Assistance (COSPAE)? Explain your role for this organization.

A. COSPAE is a not-for-profit organization – with representatives from 34 business associations – dedicated to respond to training needs of employees and young men and women still in school, through training programs and scholarships. For many years, providing training in English as a second language was a top priority for COSPAE.

Q. When were you appointed dean of Panama's oldest such institution, the Universidad Católica Santa María la Antigua? What did you achieve during your period in charge of the university?

A. I was invited to join the USMA as the Dean of the Engineering and Technology Faculty back in 2016. One of the major goals of the University was to develop maritime, port and logistics training programs at the graduate and post-graduate levels. We are now offering careers in port and logistics executive programs.



Living in London was one of my dreams – and, of course, representing Panama at IMO was a most rewarding experience

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E&M offers a wide scope of services throughout the region, thanks to its deeply rooted network of collaborators that cover the entire area of the Caribbean. The firm is also member of the South American Association of P & I Correspondents (SAPIC) as well as an associated member of the Inter-American Ports Commission of the Organization of American States (CIP/OAS).

By creating the non-profit organization, Ramón E. Mella Foundation, E&M demonstrates its full commitment to contribute to the development of maritime commerce by promoting the training to increase high standard service for the global shipping industry.

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CAPT ALLARD: CAREER HIGHLIGHTS

- Panama Canal Authority: 1978-2008
- IMO: Panama's Ambassador, Permanent Representative to the International Maritime Organization (IMO) 2000-2003
- Co-founder and first rector: International Maritime University, Panama
- Dean of the Engineering & Technology Faculty of the Universidad Católica Santa María la Antigua (USMA), Panama
- Organiser of the bi-annual Panama Maritime Conference
- A director of the Private Sector Council for Educational Assistance (COSPAE), Panama
- Awarded the medal of the Panama Canal Expansion Program



On the subject of training, one of the major problems we have experienced in Panama has to do with availability of people to work in the logistics industry. In a study I conducted for the Interamerican Development Bank (IDB) in 2014, we determined that most companies offering logistics services in Panama had problems finding people with basic technical competencies and, most importantly, soft competencies and values. I also conducted another study to determine training needs in the port and logistics industries in the Latin American and Caribbean regions. This project put me in contact with ports and logistics services providers all over the Caribbean and the region – only to find out that what was true four years earlier was still true today, in terms of availability of people, especially young people with the correct soft competencies and values – and a large dose of innovation, creativity and enthusiasm. As a member of the Board of Directors of the Maritime Chamber I've had the opportunity to travel to several countries in the Caribbean and have found that more training opportunities are necessary – not necessarily at the post-graduate level, but at the technical and trade levels. Of course, a great attitude towards the job matters the most!

Q. You also organize the Panama Maritime Conference & Exhibition XIV. Are you pleased with the success of this project?

A. This was the fifth conference that I worked on, first as part of the organising committee in charge of the academic program and then president of the conference for three years. This is a bi-annual international conference and it requires intensive work on attracting experts and delegates from all over the world. The conference also includes an exhibition that

attracts at least 100 companies that show their products and services. The experience, even though it is extremely stressful and time consuming, it is very rewarding when you see the high level of speakers and delegates from all corners of the world participating, especially the Secretary General of the IMO.

Q. How honored were you in August this year to receive the medal of the Panama Canal Expansion Program?

A. Quite honored – especially because it was a surprise! All Panama Canal vice-presidents and managers – friends and co-workers of mine for many years were invited – as well as the entire Board of Directors of COSPAE. My mother was also invited and honored with a precious gift from the Canal tea-cup collection. It was such a moving event and the Administrator was at his best speaking about my career at the Canal – and the times we worked on projects together. Unforgettable!

Q. Finally, can I ask you something about your personal life? And of your main interests outside of work in terms of sports and leisure activities?

A. My family is my top priority and I try to balance life with them and work. My friends are also a great source of strength and inspiration. I ride a bike around the neighbourhood, which allows me to wonder and think about projects I am working on. I am on the Board of Directors of the Maritime Authority of Panama, the technical training institution INADEH and the ITSE, another technical training institute – and a member of several business associations – so I have plenty of social activities associated with the work in these institutions.

My family is my top priority and I try to balance life with them and work. My friends are also a great source of strength and inspiration



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It's time we stood up for the little guy



Foreign investment 'by the back door' is not the best way forward for Caribbean cruise destinations

By Nathan Dundas, director, Caribbean Shipping Association

Caribbean ports and destinations have long been the envy of European, Asian, Mediterranean, South American and other destinations as we have enjoyed the highest market share of the cruise industry from its inception and continue to do so.

It's not just the destinations that have watched and envied the growth of the cruise sector and wanted to benefit from this lucrative sector; rather, many companies and other interested parties have been eyeing the Caribbean ports and seeking to benefit from the industry.

'NEW PHENOMENON'

For clarity, I will refer to this new foreign interest in investment in Caribbean cruise ports as the 'new phenomenon'.

We in the Caribbean cannot stop the global expansion of business interests that seek to capitalize from the growth of the cruise sector in the Caribbean; however, we do depend on our governments to make wise decisions about the business

arrangements they enter with these foreign interests. The citizens and stakeholders of the cruise sectors must be considered when governments are being approached by these foreign interests.

The fact is that after three decades of significant growth of cruise tourism in our region, we have a new entity that has entered into the Caribbean destinations and is actively involved in acquiring and handling Caribbean cruise ports.

Many Caribbean governments have been approached by this new entity and have been battling with the decision whether to have it take over their ports or whether the governments should resist and continue their own operation of their ports.

The industry's many stakeholders have, for the most part, been taken by surprise by these new entrants into the cruise tourism market as their entrance has not been transparent but has been conducted mostly

"behind back doors", as we say in the Caribbean, between themselves and government and without the knowledge of local stakeholders.

In my discussions with many destinations, it's surprising to hear that many tourism directors and stakeholders are unaware of the agreements reached by their governments



'The Equalizer' movies starring Denzel Washington are about a strong character who stands up for the weak and defenseless. It is hoped that Caribbean governments can similarly be the equalizers for the Caribbean citizens in this changing cruise environment



in an industry in which they are directly involved – agreements that will have an effect on them.

GOVERNMENTS AND LINES

The governments and cruise lines have been traditional partners in the Caribbean when it comes to arrangements with port developments and tariff charges and for the most part it has worked well and continues to do so.

The point has been made that the cruise lines could contribute more to the destinations; and individual destination governments have entered into investment agreements mutually that have seen guaranteed numbers for these destinations as well as improved facilities, etc. It has been a win-win for those destinations and for their cruise lines partners.

I believe strongly that the best negotiating partners in the cruise industry should be the governments and the cruise lines directly. It is therefore troubling that, with this new phenomenon, this arrangement is

being put at risk and I believe ultimately it will not be in the best interest of the cruise industry in the Caribbean if it escalates or continues to be eroded.

ROLE OF FCCA

The FCCA has long been the negotiator intermediary between the Caribbean governments and the cruise lines and the arrangement has been for the most part beneficial to the region. The record shows that for the last significant three decades of cruise tourism growth this entity has brought the Caribbean governments closer to the cruise lines and vice versa.

It has been argued by some that the FCCA has resisted the increases in head tax for some destinations; however, anyone taking a more objective and keener insight would see where the FCCA, along with its member lines, has helped to raise the bar requiring the destinations to improve on their standards and their infrastructure to meet the high standards of the cruise lines that

call in these destinations.

In other words, as destinations prove that they are getting better in terms of standards and infrastructure, they justify the expected demands in increases of fees.

I believe that, with the threat of this new phenomenon, it behoves the FCCA and its member lines to promote further the partnership that has been based on a solid foundation and that can be expanded upon for the benefit of all mutually.

PRICE OF INVESTMENT

I believe we should welcome foreign investment in our cruise ports, especially for destinations that require improvements in infrastructure and the attraction sites and tour opportunities. This investment, however, should not come at the cost of alienating the local stakeholders and enriching solely the foreign investors.

One of the main benefits I saw in the region where the cruise lines invested in the destination ports directly was that the governments were able to maintain control



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CHANGING FACE

of their ports and also that local entrepreneurs thrived. Most of the profits and benefits earned locally stayed in the destination, in the country. Revenues earned from the industry locally by tour operators, suppliers and other entities benefitted the local businesses and employees. Taxi drivers, vendors and suppliers became owners of their own businesses and new entrepreneurs.

Caribbean governments have an obligation to their citizens to want to maintain this business structure to the benefit of its people as opposed to seeing a 'quick fix' from foreign investors who wisely – from their standpoint – would seek to take these profits to their foreign-based accounts. Income that would have once been earned and consumed locally would disappear to foreign accounts.

This is a grave danger and a reality under this new phenomenon. We collectively have achieved a lot of benefits over three decades. We have built a lot. At this stage, why should we want to go back?

In one of my interviews to do this article, a CEO of one of the ports who have refused the enticements of this new phenomenon stated: "Why should we want to give a foreign entity control of our cruise port when we have built this from bottom up to where we are now getting over a million passengers? It doesn't make sense."

MANAGEMENT OF OUR CRUISE SECTOR

There clearly is a very concerted effort by foreign investors in our cruise sector and almost every Caribbean destination government is being approached.

Some governments, as put by one CEO, have "resisted the push and lure of selling their countries and citizens out and I



commend them for their prudent decision". Some governments have adopted a wait-and-see approach before jumping at this quick fix and ready fast cash temptation.

The governments that have entered into this arrangement for the most part point to the fact that they have not been able to see the benefits of the cruise industry in paying off long-standing debts – in some cases debts that goes back almost 20 years. The need for the absolution of those debts and the promise of other emoluments have

swayed some of these governments to look the way of handing their industry to the new phenomenon.

The question must be asked, however: have these government-owned ports been managed properly and effectively to find themselves in this position? Why is there a disparity of some ports and destinations finding themselves unable to pay off their debts and improve proper infrastructure and some others are able to accomplish this?

Is it a question of the proper management of resources earned why these ports have found themselves in this situation?

This can well be illustrated in the case of one port that has dredged and swept its one single cruise port area at least five times in five years and, most significantly, has spent

Some governments have adopted a wait-and-see approach before jumping at this quick fix and ready fast cash temptation.

CHANGING FACE

approximately US\$ 300 million between dredging and infrastructure. Absolute madness. No wonder this port couldn't pay off its debt and welcomed the new phenomenon to clear its debt and give whatever exclusive rights the foreign entity wanted to recoup its investments.

▶ Another glaring example is one of the well-known ports with millions of passengers disembarking annually that wasn't able to maintain and improve its port facility and has also gone the way of this new phenomenon.

It is really hard to understand.

Granted any destination would want to collect its fair share of taxes and income for its investments; and there may be legitimate arguments for such increases; however, if there were increases, would our expenditures also increase in an equitable manner?

There clearly is a need for Caribbean governments to manage their resources gained from the industry. As an added incentive, the FCCA does offer management

advice to governments on investments and infrastructure developments that can help ports to manage their development effectively. Caribbean governments can and should make use of this opportunity.

CARIBBEAN CITIZENS AND CRUISE TOURISM

After 30 years in this industry – and looking at it from all aspects, especially as a port agent, tourism director, etc where my responsibilities have been on the ground interacting with the cruise passengers directly and the cruise lines and with governments – I have concerns with the way forward of the cruise industry in the Caribbean.

My main concern is that of the local tourism stakeholders in the cruise industry. Many of the top tour operators and duty-free store owners, for instance, will not feel threatened by this new phenomenon. My concern, however, is for the small stakeholders and others who are seeking to benefit. Will they be

subjected to becoming hewers of wood and carriers of stones?

After building an industry up to where it is today, why can't Caribbean governments empower their citizens to continue to own and operate and manage this industry locally?

Surely, when we see the next big cruise ship with thousands of passengers pulling up at our shores, we should feel and know that our local stakeholders and our economy stand to benefit and we own it locally.

Denzel Washington's recent movies, 'The Equalizer' and 'The Equalizer 2', are about a strong character who stands up for the weak and defenseless. It is hoped that Caribbean governments can similarly be the equalizers for the Caribbean citizens in this changing cruise environment.



My concern, however, is for the small stakeholders and others who are seeking to benefit. Will they be subjected to becoming hewers of wood and carriers of stones?



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What Caribbean registries could learn from PANAMA



Sheila Fitzgerald | Shutterstock.com



By Maria Dixon
CEO, ISM Shipping Solutions Ltd

Many think that the Caribbean is just the group of independent islands that used to be British Colonies and part of the British Commonwealth, where English is spoken and the British Shipping Act is enforced. However, there are more countries which also are part of the Caribbean, they are independent but they were Spanish or French or Dutch. In fact, some are still part of France and The Kingdom of the Netherlands.

Not all of their ship registries are the same. After studying the most important registries in the region, we find that there are mainly four types: The Red Ensign Group (see panel), the full national registries where the government runs the registry; private registries where the management is given to a commercial entity, and the semi-private regime, where there is a mixture of government and private management with local/national

presence and sometimes the employees are designated by the government to be employed by the private company.

Most of the Caribbean registries have their own specialities and tend to attract similar types of vessels like cruise ships in The Bahamas registry, or yachts in the BVI and Cayman Islands, etc.

These registries need to ensure that individuals have not used their ships in the past or transported cargo from UN-sanctioned countries, shipowners and charterers.

VULNERABLE

With the UN sanctions lists being published constantly, ship registries are now more vulnerable. From what was merely a pure commercial transaction, nowadays registries have to be more conscious in the delicate work they have to do. Registries are even employing due diligence companies

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that can dig deeper than the previous CSRs of a ship or cargo manifest.

I will not be surprised if in the near future, registries may start charging for due diligence costs, as it is expensive and time consuming, especially if it is done externally.

DIFFICULTIES

During a recent discussion about the differences among registries, we discovered that one of the main difficulties is that once the IMO has approved a new convention, or there is the need to change the national legislation in a country, the changes are not done in the manner required or as fast as needed. This will create a delay and even the dynamic and momentum in a registry can be lost due to the wait passing the new laws required.

Panama has the largest registry in the world, so what could the Caribbean registries learn from Panama? There is no magic formula, instead, registries should be prepared to grow steadily, to operate efficiently, embrace new technologies and invest in training. Encourage participation in international forums, not only IMO, but also ILO and private conferences.

One of the differences between Panama and the Caribbean island registries is the high volume of work. Nowadays, registries have become more efficient than 30 years ago, as with the touch of a button the whole history of the ships appear, and they do not need to dig or maintain them manually.

Registries need to monitor their ships constantly; annual tonnage tax and annual safety inspection keep the tab on the ships. Registers should be like Swiss Bankers; they need to know their client. Trust in the client is paramount to a registry. Obviously in a registry as large as Panama, how can the registrar know over 8,000 shipowners? Very easy, through the local consulates and the lawyers. Panama has about 60 offices around the world. The Panama registry never sleeps, there is always an office open 24/7, even on Christmas Day. Caribbean island registries should take this into consideration, as they grow.

MARITIME LAWYERS

Many would call maritime lawyers a liability, intermediaries, brokers. I call them doers. They move the registry; in the past they were globetrotters and promoted the flag and their offices. They were a symbol of things done. Unfortunately, like in all business, you find lawyers that are not professionals; they do not have experience or simply their offices have so much work that you become a number not a name. Let's face it, how many times you think you have properly filled in a form and the registry turns around and says, sorry it is wrong, do it again, you

receive the message overnight and, in the morning, all is delayed? A good lawyer will ensure you have your registration as required.

So how can a registry cope with so much demand and work? This is the million and a half question. During a study and benchmarking I did for Panama in 2007 and 2010, I discovered that the Panamanian Registry receives every year about one and a half million applications. These vary from registration, radio licences, seafarers' licences, CICAs, inspections, certifications, lost CSRs, DPA endorsements. This is a lot of paperwork. Although some of the applications are now done online, there is still a need for someone to review the applications and press the OK to issue the e-certificate. Therefore manpower, training and commitment to deadlines are paramount.

Big private or semi-private registries have invested a lot of resources and have a commitment to their countries and shareholders, small registries should look at big registries and follow their growth while analysing what are they doing differently. They are constantly innovating and creating new strategies and programs. National registries follow the political agenda of their government in office, private registries follow mainly their business plan.

Many ask me if there is a plan or winning formula that registries could apply. There are a set of non-written rules that can be followed, they make sense for a good business strategy and customer service and have no political consequences.

First, know your client and what your client needs, registries must be prepared to go the extra mile in exceptional circumstances to help the client without breaking the law.

Second, ensure that the manpower is fully trained to work under pressure and high volumes.

Third, efficient communication by phone or email.

Fourth, provide assistance, guidelines, information and clarity to users; apply the international conventions and follow and participate actively in IMO and other international government organizations to ensure the registry keeps



During a study and benchmarking I did for Panama in 2007 and 2010, I discovered that the Panamanian Registry receives every year about one and a half million applications. These vary from registration, radio licences, seafarers' licences, CICAs, inspections, certifications, lost CSRs, DPA endorsements

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What is the Red Ensign Group and to which many Caribbean island registries are a part?

It is a group of British shipping registers. In the Caribbean, this group comprises the UK overseas territories in the wider region: Anguilla, Bermuda, British Virgin Islands, Cayman Islands, Montserrat, and the Turks & Caicos Islands, which operate shipping registers from their jurisdiction. Vessels registered in those countries are considered 'British ships' thus entitled to fly the Red Ensign flag.

However, these registries have certain restrictions. The registers are divided into two categories: Category 1 registers in the Caribbean are Bermuda, British Virgin Islands (BVI), and Cayman Islands, which can register ships of unlimited tonnage and type.

Category 2 registers in the Caribbean are Anguilla, Montserrat, and the Turks & Caicos Islands, which can only register commercial ships, and pleasure vessels of up to 150 gross tons (GT). This limit can be extended to 400 GT with a special agreement with the UK.

abreast with the constant changes we are living these days.

Fifth, think that there are more registries, they may be targeting certain type of ships, but a shipowner will go where he is welcome, a banker will go where his loan is secured, and a lawyer will go where he can get his case solved fast. Make their life easier.

FINAL WORD...

From the top 35 flag states listed on the ICS major shipping flags, five are from the Caribbean basin: Antigua & Barbuda, The Bahamas, Bermuda, the Cayman Islands and Panama.

We have not compared fees in detail; however, this is an element that may be working against some Caribbean registries. For example, a Minimum Safe Manning Certificate in Panama costs USD 150 whilst the same document in a Caribbean registry costs USD 700. Therefore, registries should also consider reviewing and benchmarking their charges.

Registries should not be shy. They need to talk to everyone in the industry; attend conferences, visit lawyers, bankers, shipping companies, engaged in what they do

and respond positively to the pressure they are exposed to. Ensure that the classification societies do a good job, have a healthy fleet and ask shipowners to give flag testimonials.

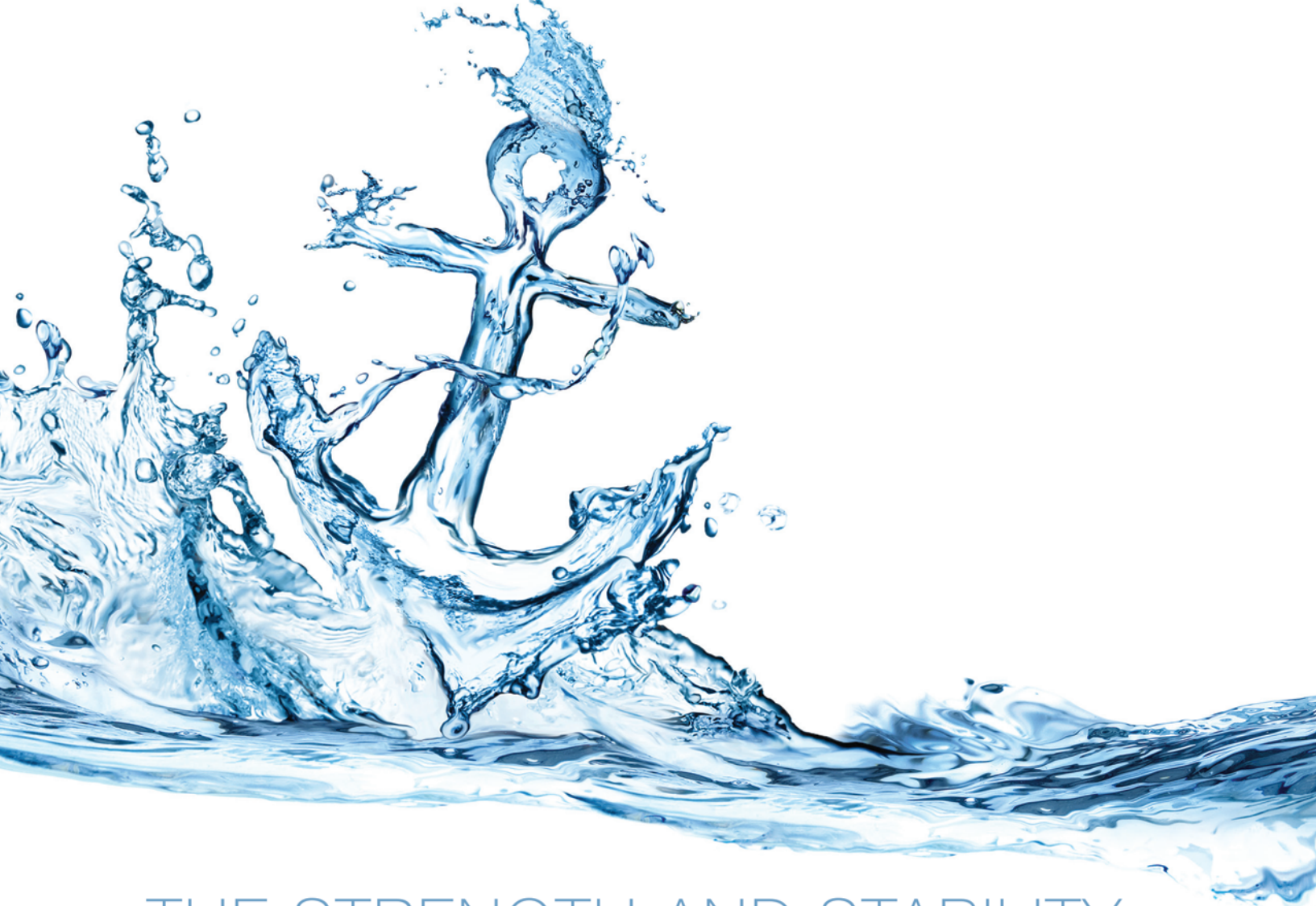
There is no reason why the Caribbean island registries can't grow further, they have all the ingredients, they just need to ensure they apply them at the right time in the right place. Manage time, training, manpower, ships and PR.

Registries should ensure that they are in the press for the good reasons, and above all have a crisis management agency ready to step in to help, because shipping is the industry with the worst publicity in the papers.

ABOUT THE AUTHOR

Maria Dixon is the CEO of ISM Shipping Solutions Ltd in UK, she has been in shipping registration and accreditation for 40 years, and is an expert in Panama shipping. She has done benchmark studies for the Panamanian Registry prior the IMO voluntary audit. Maria was elected President of WISTA-UK during 2008/14 and in 2019 received the Panama Maritime Lifetime Achievement Award.





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NEW AGENCY WHOSE TIME HAS COME

IF EVER AN ORGANIZATION'S TIME HAS COME, THEN SURELY IT IS THIS YEAR'S CREATION OF THE CARIBBEAN MARINE ENVIRONMENT PROTECTION AGENCY (CARIBMEPA).

Probably long overdue and much needed – especially as environmental issues continue to move center stage and as a green spotlight is being shone with greater intensity on the shipping industry – Caribmepa appears to be a small but significant regional step in the right direction.

There are a few people to thank for getting the still fledgling Caribmepa organization off the ground with the agency's origin story going something like this...

In September 2016 the Women in Maritime Association – Caribbean (WiMAC) held its first-ever conference at the Grand Cayman Marriott Beach Resort and to which Colin Young was invited. Mr Young is the International Maritime Organization (IMO) representative to the Caribbean. In his presentation, he pointed out that while 86 per cent of Caribbean nations had ratified Marpol only 25 per cent had actually implemented the convention.

By coincidence, Carleen Lyden Walker, who is the co-founder/executive director of the North American Marine Environment Protection Association (Namepa) was also a speaker at the same conference and learned of this situation.

CONFERENCE

So, working with Sherice Arman, who is both a WiMAC member and President of Wista-Cayman (Women's International Shipping & Trading Association), there was a follow-on conference in Grand Cayman in May last year. This subsequent meeting began the process of building Caribmepa.

The initial vision was to construct Caribmepa as an "association of associations" to gain the critical mass necessary

to develop the agency. At the same time, Ms Lyden Walker has the benefit of maritime industry longevity and is also an IMO Goodwill Maritime Ambassador. So has been appointed co-leader of the new organization.

Caribmepa fellow co-leader Rawle Baddaloo, a past president of the CSA, explains: "It was through her connections and energy that we were able to gain the attention and participation of these significant maritime entities. But it wouldn't have been possible without the commitment and support of these groups to protect the Caribbean Sea."

FOCUS

The two co-leaders issued this joint statement to Caribbean Maritime: "In essence, the focus of Caribmepa is to support the implementation of Marpol in the Caribbean by providing education, capacity building, access to waste reception facilities, a program to evaluate potentially polluting shipwrecks, and the establishment of a Marpol Training Academy. Every day that Marpol is not implemented and enforced is another day closer to a pollution event that will impact both the natural environment but also the GDP of the Caribbean nations. With the increased ship traffic now coming through the Caribbean, time is of the essence to secure the region.

The two paint a stark picture. "There is a combination of factors which are coming together to create enormous environmental risks in the Caribbean. Society's waste management practices need to be corrected with municipalities unable to control consumer refuse in landfills or it being discarded.

"Some countries are now eliminating single-use plastic, but it will take a long period of education and behavioral change before it will have an impact. Garbage in the waters and on the beaches will cause tourists (representing 80 per cent of the region's GDP) to go elsewhere. The same exists for oil pollution. If the beaches are fouled, the vital tourism industry will collapse."

Caribmepa has a five-pronged work agenda:

- Education of the public on the impacts of marine debris on the marine environment. WiMAC is also moving this agenda forward with materials supplied by Namepa.
- Support a nation's efforts to develop legislation implementing Marpol through capacity building workshops. These will be followed by enforcement workshops.
- Work with countries to advance their waste management capabilities through both port waste management programs and "waste-to-energy" facilities.
- Establishment of a Marpol Training Academy to further education on Marpol for both shoreside and seagoing personnel.
- Do a risk assessment of the 300 known potentially polluting shipwrecks in the Caribbean, of which around 90 per cent are over 50 years old. These wrecks need to be prioritized for their risk to the marine environment and a program for the removal of hazardous materials be implemented.

ACTIVITY

Meanwhile, the CSA has fully embraced Caribmepa and has been fully supportive of its mission. Rawle Baddaloo has agreed to be a co-leader along with Ms Lyden Walker and the CSA has enabled him to represent Caribmepa at high-level regional meetings. Roland Malins-Smith is also a key advisor and has been instrumental in securing Caribmepa's establishment as a force in the region. As Caribmepa builds, the CSA will have a pivotal role in furthering the agenda to 'Save our Seas'.



TIMELINE

These are early days. At time of writing, Caribmepa had yet to receive funding and a secretariat had still to be established. Incorporation was in process and admission fees were being finalized.



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DOMINICAN REPUBLIC Growing economy and growing ports

From first impressions, those arriving to attend the Caribbean Shipping Association's 49th AGM in Punta Cana won't need to be told that the Dominican Republic is one of the region's powerhouse economies. It's apparent for all to see and an example of what can be achieved with broadly the right economic policies and with an emphasis on tourism, services and telecommunications.

Not only is the economy performing well, with growth at around 6 to 7 per cent in the last year or so, but also, unsurprisingly, the nation's ports have also been enjoying success in terms of domestic cargo and the box transshipment market.

The handling of containers is, of course, dominated by DP World's Caucedo and to a

lesser extent the port of Rio Haina. At 1.33 million TEUs, Caucedo was placed 13th in 2018 among container ports located in Latin America and Caribbean and handles over 55 per cent of the Dominican Republic's total box traffic while Rio Haina accounts for around 40 per cent.

While Caucedo seems to grab the headlines, working hard is Haina International

Terminals (HIT), which operates and has developed the port of Rio Haina, 16 km from Santo Domingo.

As the nation's main multipurpose port, Rio Haina has 15 berths astride the Haina River. The port handled 423,000 TEUs in 2018 and expects to hit around 438,000 TEUs this year. HIT also handled an impressive 5.7 million tonnes of breakbulk



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DOMINICAN REPUBLIC PORTS

Dominican Republic is more than these two main container ports. In fact, the state-owned Autoridad Portuaria Dominicana (Apordom) administers a total of 16 ports and harbours

cargoes and 32,000 vehicles last year and confidently expects to top both figures in 2019. HIT has invested over US\$ 120 million in the past 10 years upgrading the port and two new Panamax cranes were due to be delivered in early October from China's Dalian Heavy Industries (DHI).

But the Dominican Republic is more than these two main container ports. In fact, the state-owned Autoridad Portuaria Dominicana (Apordom) administers a total of 16 ports and harbours, including both Caucedo and Haina, around a 1,288 km coastline.

At least three of these ports – Amber Cove, Puerto Arroyo Baril (Samaná) and La Romana – are largely dedicated to cruise traffic while La Cana and Punta Catalina do not as yet function as ports.

OTHER PORTS

- San Pedro de Macoris: Handles dry bulk imports of clinker, coal and fertilizers; export of sugar and molasses and bagged cement.
- Puerto de Azua: LPG terminal port used by gas carriers, tugs and barges
- Barahona: Export of dry bulk cargoes such as plaster, salt and cement, sugar and import of coal
- Boca Chica: Containers, general cargo, liquids, forest products
- Cabo Rojo: Bauxite, limestone, cement
- Manzanillo: Imports: clinker, coal; exports: reefer containers
- Puerto Plata: Container, general cargo and cruise ships
- Santo Domingo (Sansouci Terminal, Don Diego Terminal and Santo Domingo Terminal): Cruiseships, vehicles, general cargo, containers, ferries (to Mayaguez)
- Las Calderas: The location of the Círculo shipyard



Rio Haina Port



Caucedo

LOGISTICS HUB

Earlier this year, DP World's group chairman and CEO Sultan Ahmed bin Sulayem met with President Danilo Medina. The pair discussed how to develop a Caribbean logistics hub in the country. The two men agreed that innovation, technology and digitalization will play a big role in realizing this ambition. DP World says it is looking forward to working more closely with the Dominican Republic, helping the nation to build truly regional trade links for the future.



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DEFENDING AGAINST THE CYBER ATTACKER

Shipping and Cybersecurity

When the news reports a cyber-crime, there will be a large number of companies that will clench their teeth thinking of the havoc these attacks represent, especially the lack of trust that their customers will experience towards that particular company.

In shipping as in most industries, there is actually a lack of infrastructure and personnel dedicated to detect, avoid and reject those intrusions and attacks from the outside. This is due to incorrectly assuming that these intrusions and hacking only happens to banks, financial industry, government security agencies or even the media.

The fact is that hacking, intrusions, attacks, stealing information, systems alteration etc., is such a reality and unfortunately, many companies do not realize that they are being affected by these kinds of crimes.

The dangers of having an open door for these attackers range from simple password stealing, to credit card data and/or personal information, payroll data, an enterprise's confidential transactions,

shipment data, drugs trafficking, smuggling, hardware and operating systems malfunctioning and destroying of systems.

All of us know how or what could be accomplished when an attacker steals information or data, but in most cases, companies don't know that they might be shut down due to having their computers, communications, software or storage compromised or corrupted. This brings another big issue for any industry – how can they keep their business up and running, or applying a system backup, as most of them may lack a business continuity plan in case they are greatly affected by such attackers.

CONFIDENCE

One of the common ways to get into the company and personal information is as simple as the use of an e-mail, because it is one of the most commonly used technology and communication tools. Why this? The attackers have plenty of confidence in a very simple thing and that is the naivety and fear of the regular e-mail users.

For example, they can easily design an e-mail with exactly the same shape and layout of their banks and tell the “customer”



By Félix Griman
Cybersecurity expert

their accounts are being compromised regarding its security and there is a need to update the account information and login.

After that, they invite the user to do that update clicking on a link they provide.

There is a lot, and I mean a lot, of people who follow their fears and without asking or suspecting anything bad, click on the provided link and start to write all their bank information as if they were updating it, but the truth is, that they are giving in the most easy way, all the information to the cyber criminals.

This modus operandi could be applied from a personal mail account up to an enterprise mail account, giving the

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...the “authorized” intrusion was made directly by me. But what if an unethical hacker would want to try to get access to those networks and systems?

information needed to enter to the bank online account. Due to this, a lot of money and information has been stolen from a lot of companies that keep these things in silence to avoid being affected publicly and loose clients.

This is only one type of scam and is called phishing; there is a large range of cyber-crimes using the e-mail service as the vehicle to get the data they want and it can have a wide variety of implementations, i.e. auction fraud, chain mail, false computer support calls, donation scam, etc.

SOPHISTICATED

On the other hand, we have the more sophisticated way of hacking and stealing information and data through direct attacks over the computing, communications and network devices. These kinds of attacks are called “Brute Force Attacks”.

This time, the attackers are high skilled technical professionals that use all of their knowledge to get access into the enterprise’s systems, breaking the security implemented, when it is implemented and well done; otherwise, anyone with a minimum knowledge could break into the systems and communications.

In these cases, the complete operational processes and information of the company can be affected, modified, stolen, erased, corrupted or a combination of all of these.

For example, I once was asked to perform a security audit in some servers from a worldwide oil company. It sounds like being a very big a powerful enterprise,

all of this should be only to check what is supposed to exist (for ethical reasons, the name of the oil company cannot be mentioned). As a result, I was able to detect a number of security failures and get access to ALL the company confidential information.

Of course, being a professional and an ethical hacker, I previously signed a confidential contract with the company; I had to create a report with all my findings and as a result, the IT manager was removed from his duties.

In this example, the “authorized” intrusion was made directly by me. But what if an unethical hacker would want to try to get access to those networks and systems? They could have easily stolen all the information from wells data up to personal information of any employee.

INFORMATION

But beyond the stealing of a vital company and personal information, any security breaker would be able to damage and/or de-configure any computing or communication device and have all the operations down for a very long time in all the areas affected and it could happen in oil, gas, maritime and air shipments, ports, banks, insurance, logistics, food and any kind of company, including a shipping company.

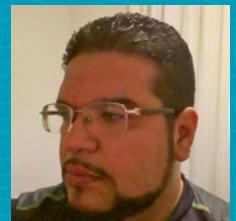
Here we have another very big issue, what if there is no procedure or contingency plan to keep the business up and running after an attack?

This is a very short article with a couple

of examples regarding how companies can be affected; how information can be stolen, damaged and compromised by an unethical hacker if there is not a defense plan against intruders and most of all, if an industry, shipping in this case, doesn’t know all the risk it might have inside its operations.

Sadly, these kinds of things don’t belong exclusively in action movies but are very real.

ABOUT FÉLIX GRIMAN



Félix is an international expert in design and management of high-performance, fail-safe and resilient networks and systems infrastructure. Over two decades of experience in national security projects in several countries; implementation of secure transmissions, encryption, access levels; delivery times management, relationship with governments and companies as well as change management and dealing with conflicts at high-level national administration. Graduate in Systems Engineering and Chemical Engineering; Cisco CCNP, Microsoft MCSE. His interest is the cybersecurity applied to the shipping industry.

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The CSA and WiMAC to work on gender equality project



Addressing misinformation about gender equality and women's rights in the maritime sector, is as important as ensuring efficient systems, enabling environments and productive capacities, and is an ongoing focus of the Women in Maritime Association Caribbean (WiMAC).



WiMAC was established in 2015 under the auspices of the International Maritime Organization (IMO) to amplify discussion on the progress and development in the global maritime sector for women.

Currently, women represent two percent of the world's 1.2 million seafarers, with 94 percent of female seafarers working in the cruise industry. Women are more evenly represented in the shore-based sector. In 2015, the Port Authority of Trinidad & Tobago estimated that up to 60% of its staff were women and in February 2019, 70% of the work force of Grenada Port Authority were women.

SURVEY

However, a 2016 survey by the Maritime HR Association found that most women in maritime occupy administrative (74%) and junior positions (55%) mainly in corporate support human resources and finance roles. Only 37% of available professional-level positions were occupied by women: 17% at manager-level, 12% at director

level and 9% at the executive level. 9% of women were found to hold positions in ship management (UNCTAD 2017). Closer to home, only 14% of maritime administrations in the Caribbean are led by women.

WiMAC is promoting the need for disaggregated data on where women are in the sector, and on the opportunities and barriers to achieving gender equality. A three-week online survey conducted in February 2019 gathered biographical, organizational and gender-related data on 77 women in the Caribbean industry. While it left several unanswered questions about gender equality in the sector, the reported areas for most concern were salary differences, work-life balance, and the absence of gender policies and industry standards. Respondents reported that while women were as capable as men to serve in senior



executive positions, compared to men, women were not given equal opportunities to do so. Only 47% of respondents agreed that "management" is committed to anti-discrimination practices.

ISSUES

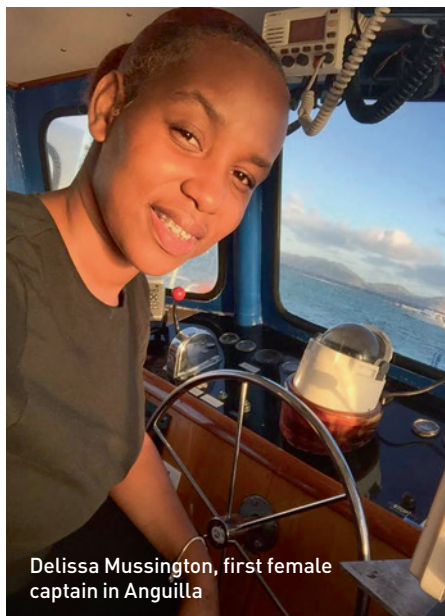
The top three issues identified to enhance gender equality were: introducing gender diversity courses for women and men; conducting gender audits in port and shipping institutions; and ensuring national gender policies reflect the culture and circumstances of the port/maritime sector.

In March 2019, Dwynette D. Eversley, WiMAC's President reached out to Juan Carlos Croston, the President of the Caribbean Shipping Association to field a joint project on Gender Equality and Mainstreaming in the Caribbean Maritime Sector. The CSA readily agreed to partner with WiMAC and both organizations are working to define a longer-term agenda to change old paradigms. According to Mr Croston, "let's start by making it clear what gender equality is, and what it isn't."

BIASES

WiMAC's President agrees. "Women aren't interested in 'taking over' but we do need to overtake tired biases that reinforce what we can and can't do, and where we should or shouldn't be. We may need to start at the very fundamental level of language used in our industry that may implicitly posit men above women".

The CSA/WiMAC Joint Project will focus on education resources that increase awareness and enhance sector buy-in in a non-threatening way and build male allies; research on cultural norms and industry practices that impact gender equality; and on partnership



Delissa Mussington, first female captain in Anguilla

MISSION AND VISION OF WiMAC

The mission of WiMAC is to foster the development and participation of women in the maritime sector and contribute to the growth of the industry within the region through:

- Empowerment of women through capacity building
- Advocacy on issues affecting women and the industry
- Lobbying and contributing to the development of responsive legislative and regulatory environments
- Mentorship to facilitate career advancement and professional well-being of women in the sector

- Networking to share best practices and forging of partnerships to strengthen the industry and provide opportunities for resource mobilization
- Recognition of achievements among maritime women
- Promotion of the maritime industry
- Contribution to research and development to the maritime industry
- Corporate and social responsibility.

The strategic vision of WiMAC is to be a key resource for the sustainable development of the maritime sector.

projects that build inclusive strategies incorporating gender perspectives.

Opening conversations about addressing the disparities in rights and access of women in the Caribbean maritime sector is not easy, but it is necessary. With the 2019 observance of World Maritime Day on the theme "Empowering Women in the Maritime Sector", and with enhanced global focus on breaking barriers to women's participation in male-dominated industries, the time is right for the Caribbean maritime sector to fully embrace the impacts that women can make in growing the sector and in making a much-needed difference in our social and economic development as a region.



WiMAC President with IMO Secretary General and Minister of Transport Jamaica at the Caribbean Ministers of Transport Meeting in Jamaica



WiMAC TT Chapter and the TT Shipping Association joins with UWI Institute of Gender to commemorate WMD 2019



President Tamara Lowe and executives of WiMAC Dominica Chapter



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**PORT
CANAVERAL**

PORT BRIEFING

1 CURAÇAO CURAÇAO IN SISTER PORT AGREEMENT

Curaçao Port Authority signed a sister port agreement with the Port of Sans Souci in the Dominican Republic in June 2019. The agreement was signed by Humberto de Castro, chief executive of CPA, and Gabriel Rodriguez Pereyra, his opposite number in Sans Souci. This cooperation allows the two ports to exchange cargo and cruise industry information as well as historical statistical data, planned seaport infrastructure developments and general marketing research. The parties have also agreed to look at increasing maritime traffic in both ports, work towards educational exchange visits, promote the relationship and advantages of doing business at both ports and consider mutual participation in port-related conventions.

2 MONTSERRAT LITTLE BAY GO AHEAD

The government of Montserrat and the Caribbean Development Bank (CDB) in cooperation with the UK's Caribbean Infrastructure Fund (UKCIF) have given the go ahead for Little Bay port development. It's one of the largest projects undertaken in Montserrat.

The new port will mean a total investment of GBP 21.4 million and allow Montserrat to accommodate larger cruise ships and, as a consequence, see greater number of passengers visit the island. The project has been made possible through grant funding of GBP 14.4 million from the United Kingdom Department for International Development (DFID). The government of Montserrat is providing a further GBP 7 million in counterpart resources with financial support from the European Union.

3 TRINIDAD & TOBAGO WHARVES DREDGED IN PORT OF SPAIN

Dutch Dredging BV won a contract from the Port Authority of Trinidad & Tobago to dredge the area at Queen's Wharf and Caricom Wharves.

The contract, which began in mid-June, also includes ancillary works for the Government Shipping Service.

In the course of the dredging works, the Galleons Passage will be relocated to Berth 3 at the Cruise Ship Complex.

4 FLORIDA TAMPA BAY WELCOMES NEW ASIA LINER CALL

Port Tampa Bay has welcomed the announcement in July of an important new liner call. ZIM, Mediterranean Shipping Company and Maersk have launched a new joint direct containership service from Asia to the US Gulf to include weekly calls at Tampa.

The new service will deploy 10 ships of 4,500 teu capacity on the following rotation: Xiamen, Yantian, Busan, Panama Canal, Houston, Mobile, Tampa, Manzanillo (MIT), Panama Canal, Balboa, Busan. The first sailing was due to depart Xiamen on 16 August.

Paul Anderson, president and chief executive of Port Tampa Bay, said: "This is great news from our long-standing carrier ZIM and its partners MSC and Maersk. We are confident this new service will be very well received by Florida importers and exporters with its competitive transit times to and from Asia and connections to other markets across the globe."

5 DOMINICAN REPUBLIC DP WORLD IN TALKS ON FUTURE LOGISTICS HUB

Sultan Ahmed Bin Sulayem, group chairman and chief executive of DP World, met with President Danilo Medina of the Dominican Republic to discuss how to develop a Caribbean logistics hub in the country.

It was agreed that innovation, technology and digitalization would play a big role in realising this ambition.

DP World is said to be looking forward to working more closely with the Dominican Republic and helping it to build regional trade links for the future.

6

THE BAHAMAS MSC CRUISES' OWN PRIVATE ISLAND

An exclusive destination now being offered by MSC Cruises is the company's own private island in The Bahamas. Ocean Cay MSC Marine Reserve covers 120 acres and is located 65 miles east of Miami.

Starting in November, all Caribbean cruises operated by MSC from PortMiami will visit Ocean Cay. Key features include a dock, palm-fringed beaches, a food court, an ice cream and coffee shop and a lighthouse with a bar, a terrace and live music. Light shows are planned after sunset. The 'MSC Meraviglia' is due to make the first ship call at Ocean Cay on 9 November.



OCEAN CAY MSC MARINE RESERVE

7

HAITI TERMINAL VARREUX

TVB Port-au-Prince, a partnership between Bolloré Ports and the local Terminal Varreux is completing a new 250-meter length berth dedicated to the handling of containerised cargoes. The new berth will have an alongside depth of up to 12 meters.

When fully operational the new Port-au-Prince berth will be equipped with two new mobile harbor cranes and have storage capacity for 4,000 TEU in the four-hectare yard. Annual throughput is expected to be around 100,000 TEU. The berth will be operational 24 hours a day and 365 days a year.

8

THE BAHAMAS NASSAU CRUISE PORT

Global Ports Holding (GPH) has announced the signing of a 25-year port operation and lease agreement for Nassau Cruise Port, a project, the company says, will transform the cruise experience in Nassau. The deal covers Prince George Wharf and related areas at Nassau Cruise Port.

The Government of The Bahamas, GPH have joined forces with the Bahamas Investment Fund and the Yes Foundation to create the Nassau Cruise Port (NCP) consortium. GPH will use its global expertise and operating model to manage Nassau Cruise Port.

The NCP consortium will invest up to US\$250 million to improve the cruise guest experience in Nassau and to build a new terminal to expand the port's capacity. The new port facility will have an intermodal area with bus stops, taxis and parking spaces, as well as space for electric trams to transport guests between the ships and the terminal building.

In addition, the NCP consortium will build an events and entertainment area, construct food and beverage facilities, and improve the existing retail space to enable local artisans and farmers to sell their products. Work will also be carried out to improve transport connections, traffic flow and signage.

9

THE BAHAMAS LIGHTHOUSE POINT

Disney Cruise Line has shared new information and two early conceptual artist renderings for its second island destination and cruiseship terminal in The Bahamas, which is located Eleuthera's Lighthouse Point.

Disney Cruise Line bought privately owned Lighthouse Point in early 2019 and signed an agreement with the Government of The Bahamas. This agreement ensures that the Lighthouse Point site will be developed in a responsible and sustainable way.

Disney Cruise Line says it aims to develop less than 20 percent of the property; employ sustainable building practices, including an open-trestle pier that eliminates the need to dredge a ship channel and donate more than 190 acres of privately owned land to Government, among other commitments.

Construction is expected to begin in 2020 with completion in late 2022 or 2023.

10

PROVIDENCIALES SOUTH DOCK

On Providenciales an expansion project aimed at boosting South Dock port's limited and aging cargo handling capacity, is expected get underway in 2020.

This is part of a five-year development and as outlined by acting director of the Turks & Caicos Ports Authority, Delton Jones.

The expansion plan calls for the construction of two new berths and to later enlarge the current berth to create two further berths.

Mr Jones said the project is long overdue. "The port has sustained economic developments in Provo for over 25 years and is nearing the end of its useful life". So the port needs to be modernized.

Other existing facilities at the berth such as administrative buildings, offices and an engineering workshop will also be upgraded. South Dock handles around 85% of all seaborne imports into the Turks & Caicos.



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4

TCI CRUISE FIGURES HIGHER THAN EXPECTED

The Turks & Caicos Islands received over 1 million cruise passengers in 2018 despite suffering damage from two hurricanes the year before.

The Ministry of Tourism had previously expected Caribbean destinations to slow down in 2018 in the wake of the hurricanes, but the TCI cruise sector has evidently bounced back.

Plans are under way to expand the pier in Grand Turk to accommodate Carnival's Cruise Line's new ship, 'Mardi Gras' in 2020.

5

REEFER MARKETS GET NEW FASTER SERVICE

The common carrier X-Press-Feeders has recently launched a new service covering two popular reefer markets. Its Panama Central America X-Press (PCX) service, which commenced in June 2019, goes to the Central Americas and Costa Rica. The company is offering shorter transit times for its Central America shipments as a result of this newly launched service route.

6

CONSULTANCY OPENS HAITI OFFICE

E&M International Consulting is opening its first office in Haiti with a view to improving its correspondent services in the country. Its Haitian office is at 46 rue Villemey, Bois-Verna, Port-au-Prince, represented by Frank S. Vaneus, its partner in Haiti. E&M has also trained a team of surveyors for immediate response to the Clubs and their members' needs in Haiti.

STARBOARD BRIEFING

3

TRINIDAD & TOBAGO

The Government of Trinidad & Tobago has ordered two new ferries on behalf of Inter-Island Ferry Service from specialist Australian shipbuilders Incat and Austral.

One of the pair will be constructed at Austral's new Yung Tau yard in Vietnam and the other in Hobart by Incat – and will be used between the Port of Spain and Scarborough.

The 100-meter long, 36-knot, wave-piercing catamaran, will have the capacity to carry up to 1,000 passengers and 239 cars or a combination of trucks and cars.

The new ferry will have a service speed of 36 knots and a capacity of 1,000 passengers and 239 cars, or a combination of trucks and cars.

The ferries are expected to be delivered to Trinidad & Tobago in late 2020.

1

NEW GRANT OPEN TO CMU STUDENTS

The American Caribbean Maritime Foundation (ACMF) has launched the Fern Khan Grant, open to returning students for undergraduate degree programs at the Caribbean Maritime University.

The award is tenable for the 2019/2020 school year and the first set of students awarded are from St Vincent and Jamaica. They are James Foster, Kamal Swaby, Athina Francis, Andre Theobald, Horatio McLean and Jenelle Hinds.

The scholarship celebrates Jamaican American Fern Khan's 60 years in academia. Ms Khan retired from her last position as Dean of the Division of Continuing Education at Bank Street College of Education in New York. She is currently vice president of the ACMF.

2

SBM OFFSHORE TO DELIVER FPSO TO GUYANA

The Dutch-based group SBM Offshore has won a contract to deliver a floating production storage and offloading (FPSO) unit for ExxonMobil's second phase of the Liza development offshore Guyana.

Under this contract, SBM Offshore will construct, install and lease and operate the 'Liza Unity' FPSO for up to two years.

The FPSO is part of the first phase of ExxonMobil's Liza field development. The Liza field sits in the giant Stabroek block, covering almost 27,000 sq km, about 200 km offshore Guyana, where ExxonMobil has over a dozen oil discoveries, yet to be developed.

10

APL'S NEW SERVICE TO DOMINICAN REPUBLIC

The container carrier American President Lines (APL) is introducing a new America, Central America and Caribbean (ACC) service in August 2019 connecting the US East Coast with the Dominican Republic.

The new weekly service offers three-day and five-day transit times from Miami to Rio Haina and Caucedo respectively. It will also make a weekly call at Kingston, Jamaica, to connect with the Asia Caribbean Express (ACE) service operated by APL to Latin American ports.

The ACC service will commence on 23 August. The port rotation will be Miami, Rio Haina, Caucedo, Kingston, Belize, Puerto Cortes, Puerto Barrios, Cartagena and back to Miami.

APL has pointed out that the Cartagena call will give Latin American shippers access to Asian markets through APL's Asia-Latin America service.



KINGSTON CONTAINER TERMINAL

11

FRENCH LINES SPONSOR NEW RESCUE BOAT

French shipping companies CMA CGM and Ponant have made a commitment to the Société Nationale de Sauvetage en Mer (SNSM) by investing in the construction of a new 14.5 metre long rescue boat for use around Îles des Saintes in the French Antilles. Ponant president and co-founder Jean-Emmanuel Sauvée said: "Supporting the SNSM is an obvious move for us and illustrates the natural solidarity that unites all mariners."

7

AMERICAN CARIBBEAN MARITIME FOUNDATION

The American Caribbean Maritime Foundation (ACMF) announced that it will honor three outstanding leaders in the maritime sector in the Caribbean at its annual Anchor Awards to be held Friday, October 11th at the New York Yacht Club.

Taking home the Anchor Award prize this year will be Remy Vyzelman, President/CEO of Integra Marine; Gregory Purdy, SVP Operations, Royal Caribbean International; and David Harding, past president of the Caribbean Maritime Shipping Association, and Barbados Port Inc.

Since its inception in 2016, the ACMF has donated over \$200,000 toward scholarships and classroom construction to the Caribbean Maritime University (CMU) based in Kingston, Jamaica. The ACMF recently launched the Fern Khan Grant for students struggling to finish their degree at the CMU. Eleven (11) scholarships, including the ACMF/Royal Caribbean International Scholarships, have been awarded to students from The Bahamas, St. Vincent and the Grenadines, and Jamaica by the ACMF and the foundation has raised a Lecture Theater in the name of ACMF largest donor, Roland Malins-Smith, founder and retired president of Seafreight Lines Ltd. Mr. Malins-Smith is serving as Honorary Chair of the 2019 Gala, having received an Anchor Award in 2018 for over 50 years of leadership in the sector.

"Aside from being about the students, this is also about partnership", says ACMF founder and president, Dr. Geneive Brown Metzger, former Consul of Jamaica in New York. "We would not be able to accomplish our mission without the generosity and commitment of our donors and sponsors. "Of vital importance to the Caribbean economy, is the maritime sector, and it requires a well-trained, professional and local workforce of port operators, mariners, logistics staff to ensure its future", says Emerson Alleyne, Executive Vice President of the Barbados Shipping Association.

Sponsors of the 2019 gala include Royal Caribbean International; Integra Marine Services; Hudson Analytix; Chalos & Co, P.C.; Monarch Yachts; Barbados Shipping Association; Caribbean Shipping Association; David Harding MBE; and Karren Dunkley, EdD.

9

CARNIVAL VESSEL GETS A LIFT TO DRY DOCK

Royal Boskalis Westminster was awarded a contract by Carnival Cruise Line to lift the 'Carnival Vista' out of the water onto the semi-submersible heavy lift ship 'BOKA Vanguard' and transport the 4,000 passenger capacity cruise ship to a shipyard in The Bahamas for drydocking. The 'Carnival Vista' had experienced technical problems with its azipods. Described by Boskalis as "a world first", this operation took place in Freeport in July 2019. The 'Carnival Vista' was expected to be out of service for 17 days.

8

ANTIGUA

Dona Lisel Regis has been appointed general manager at the Global Port Holding-managed Antigua Cruise Port. Ms Lisel Regis was previously business development director at Margaritaville Caribbean Group and in the past worked as director of marketing and product development at St Lucia Air & Seaport Authority (SLASPA).



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A POSITIVE MARKET ON AVERAGE

But mixed developments throughout the various sizes



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CONTAINER MARKET

The major topic for the global container charter market during the last couple of months has been the upcoming IMO 2020 fuel oil sulfur limit, which already showed its first real effects. The installation of exhaust gas scrubbers, which for most vessels takes at least 40 days, caused large tonnage to become in short supply, especially in the Asian trading area.

By early September all ships above 2,000 TEU had found employment as the liner operators had increasingly been forced to charter in smaller and smaller tonnage as dry-dock replacements. From the beginning of July to the beginning of September charter rates for 2,500 TEU geared, 2,700 TEU gearless, 3,500 TEU gearless and 4,250 TEU gearless ships increased by 7%, 13%, 23% and 53% respectively. In the Americas the scrubber effect has not been as significant yet but did help to balance other adverse developments to some degree as described in the comments below.

Contrary to the generally improving market, the 2,500 TEU segment did experience a small decline throughout

the summer. As two major liner operators upsized from 2,500 TEU ships to 7,000 TEU and 4,500 TEU wide-beam tonnage respectively, more than ten-high reefer 2,500 TEU vessels became surplus or had to shift to other services where capacity is not fully utilized. Despite those service restructurings barely any ships remained idle in the Caribbean during the last months, but the surplus tonnage availability in Europe put pressure on the rates which declined to about USD 10,000 levels. In addition to the overall pressure on earnings the premium for high reefer ships all but disappeared.

The oftentimes stable balance of supply and demand in the Americas can be illustrated by one ship sitting idle for almost 4 months as no suitable extra requirement materialized during that time.

One factor preventing the market from falling even further was that several 2,500 TEU ships sailed to the Mediterranean in order to have scrubbers installed.

The modern, more fuel economic managed to keep rates stable in the mid USD 13,000 range.

The 1,700 TEU category fared relatively

well on the back of tight supply and charter rates increased by about 20% during the last four months to mid/high USD 9,000 levels. Ships in this size rarely fell into spot positions during the summer and there was even a small net inflow of 1,700 TEU when adding up all the ships coming/leaving from/to Asia and Europe. In addition to better rates many ships were able to fix periods lasting for more than 12 months. Two ships will also have scrubbers fitted; one coming from Asia and one left the Caribbean for a European shipyard to return after the retrofitting works have been completed.

The high reefer 1,300 TEU segment proved once again to be fairly stable. In sync with the adjacent size categories of 1,100 and 1,700 TEU charter rates also improved during the end of the summer from mid USD 8,000 to very high USD 8,000 or low USD 9,000 levels. Compared to the relatively weak Mediterranean market the rate difference for those ships had increased to USD 1,500/2,000 by early September.

After an unspectacular spring the 1,100 TEU segment faced a rollercoaster ride during the summer. In the middle of May five

ships of around 1,100 TEU, representing over 10% of total capacity in this segment and area, where unemployed in the Americas. By July/August however two operators opened new services which they had planned to fill with 1,100 TEU tonnage. As the new services required five ships and some of the previously unemployed ones had left the area or had found new employment by then, not all positions could be filled with the planned capacity. As a consequence, one operator was forced to charter in a 1,300 TEU ship and another had to take a 1,100 TEU ship from the Mediterranean. The scarcity of tonnage also lifted the market from high USD 6,000 to low USD 7,000 levels.

Geared eco-ships continue to earn a significantly higher rate than the standard tonnage. Since rates and employment prospects in other areas of the world and especially in Asia are relatively poor for those kinds of ships, owners continued to show interest in positioning their ships to the Americas using project cargo from Asia or containerized aid cargo from the Mediterranean.

Very small container ships of under 800 TEU have shrunk to a marginal role in the Americas. As only about 15 charter ships and the same number of shipping line-owned ships remain, the charter market has become relatively illiquid. Consequentially, ships on the one hand have to regularly bear idle times between employments but on the other hand are able to command good rates once a requirement turns up as the competition is limited. On a small scale though, fresh projects are still being realized as a new operator chartered a geared 500 TEU ship coming from Europe for a service catering to Venezuela.

Although the very large majority of ships trading in intra-Americas services are still

On average the Caribbean is faring better than South America as for example the Eastern Caribbean Central Bank is forecasting 4% growth for the region in 2019

geared, the interest in geared vessels is steadily increasing as port infrastructure developments are progressing. One geared 1,300 TEU ship positioned from the Mediterranean to the Caribbean during the summer and charterers are also looking at 1,200 TEU geared ships currently operated in European waters.

A whole new port and container terminal opened for business in August in Posorja, Ecuador. A little south of Guayaquil, the new deepwater port imposes no vessel size limitations and is already served by container ships up to 11,000 TEU. Although Guayaquil is also able to accommodate ships this size, the new terminal might pose new options to rationalize or upgrade some of the nine WCSA feeder services currently run with 19 ships between 950 TEU and 2,500 TEU.

The new container terminal in Puerto Moín now, after a slow and problem-laden start at the beginning of the year, had a major impact on the 2,500 TEU category. As mentioned above, the employment of larger geared vessels has significantly reduced the demand for the traditional 2,500 TEU geared ship. Since the beginning of September, three transatlantic services, utilizing geared ships of 3,500 TEU to 7,000 TEU have now been established.

MACROECONOMICS

The US-China trade war, Brexit-related uncertainty and volatile energy prices due to geopolitical tensions still provide several

risks to global economic expansion. Against these odds, the global economy still nevertheless forecasted to yield 3.2% growth in 2019 with 3.5% in 2020; however, with less global trade activity than previously anticipated. Expected trade volume growth declined to around 2.5% for 2019, dropping by 1.2% compared to 2018. About 70% of the increase in the global growth forecast for 2020 relative to 2019 is accounted for by projected stabilization or recovery in stressed economies.

The emerging market and developing economy group is expected to grow at 2.9% in 2019, rising to 4.8% in 2020. The economic growth forecasts for the Latin America and the Caribbean region for 2019 and 2020 have been downgraded since the beginning of the year to just 0.6% and 2.3% respectively.

On average the Caribbean is faring better than South America as for example the Eastern Caribbean Central Bank is forecasting 4% growth for the region in 2019. On an individual country level though the outlook remains mixed as the Dominican Republic, Antigua & Barbuda, Dominica and Grenada are all expected to expand by over 4% whereas Jamaica, Barbados and Trinidad & Tobago are predicted to grow very little, if at all, this year.

The political and economic turmoil in Venezuela still remains unsolved. After a relatively stable situation in terms of container shipping in 2018 and 2019 the situation did deteriorate during the summer. The number ships trading in regular liner services to Venezuela has further been reduced to just seven ships. Ad hoc calls are instead becoming more and more the normality. The cost of transport has also drastically increased as some ship owners are now reluctant to call Venezuelan ports at all and most of the liner operators have levied war risk surcharges of over USD 1,000 per container.

CONTEX

	CONTEX	12 MONTHS, 1100	12 MONTHS, 1700	12 MONTHS, 2500
May 19	402	6,590	8,343	9,069
Jun 19	399	6,462	8,338	8,905
Jul 19	400	6,462	8,415	8,862
Aug 19	423	6,477	8,600	9,023

The dire situation in Venezuela is also having knock on effects on Cuba where fuel shortages are arising and the government is forced to favor upholding basic services to the people over long-term investments. Additionally, the tightening of US sanctions is expected to have negative implications for economic growth.

Besides the financial and political issues several countries in the region have to deal with natural disasters and these exacerbate the region's macroeconomic challenges. The estimated cost of the impact of hurricanes and floods in the region is approximately 2% GDP per year.

SALE & PURCHASE OF CONTAINER TONNAGE IN THE CARIBBEAN

Direct Caribbean sale and purchase activity was very limited and is not expected to rise much as only about a handful of ships in various sizes, currently sailing in the area, are for sale. The last geared 500 TEU charter ship has been sold to South East Asian end users leaving only some geared 700 TEU ships charter ships and a few small ships employed in liners' own trades in the region. In an unusual move, a US niche carrier has bought a 700 TEU ship in Asia which is to be equipped with scrubber and cranes before joining the US Gulf service. Furthermore, a gearless 700 TEU ship changed from Dutch to German hands and remains in the Caribbean as a charter ship.

Despite the increase in charter rates since August, especially in Asia, ship prices have not risen yet as uncertainty remains and the banks are currently pushing large amounts of tonnage into the market.

None of the newbuilding projects in the sub 2,000 TEU segment for Caribbean trading accounts has materialized as of yet.

Scrap prices for container ships on the Indian Subcontinent have fallen by about 75\$ to 100\$ per ton during the last four months. In combination with rising charter rates, this development has caused scrapping activity to fall close to zero during the summer. A number of ships were actually sold on by cash buyers for further trading after they had originally been sold for recycling.

SELECTED CONTAINER FIXTURES

SUB 1,000 TEU - CELLED

May 19	CFS Pafilia 712 TEU / 428@14 / 17.2on28 / 156rp	4-5 months	US\$	6400	p/d
Jun 19	Lena 966 TEU / 604@14 / 18on35 / 252rp	6-7 months	US\$	6800	p/d
Jul 19	Vega Omikron 957 TEU / 604@14 / 17.7on43 / 252rp	3 months	US\$	6800	p/d
Aug 19	Regula 683 TEU / 402@14 / 17on28 / 118rp	3-6 months	US\$	6800	p/d
Aug 19	Sunway X 678 TEU / 436@14 / 17on30 / 120rp	1-3 months gearless	US\$	6000	p/d

1,100 TEU - GEARED, CELLED

May 19	New York Trader 1083 TEU / 650@14 / 20on43 / 200rp	3-5 months	US\$	6750	p/d
Jun 19	Pacific Trader 1118 TEU / 700@14 / 20on42 / 220rp	8-10 months	US\$	6800	p/d
Jul 19	Toronto Trader 1103 TEU / 706@14 / 18 / 220rp	2-4 months eco ship	US\$	8850	p/d
Jul 19	Asian Trader 1118 TEU / 700@14 / 20on42 / 220rp	2-4 months	US\$	6800	p/d
Aug 19	Contship Pax 1114 TEU / 700@14 / 19on45 / 220rp	4-6 months	US\$	7300	p/d

1,300 TEU - GEARED, CELLED

May 19	Warnow Whale 1296 TEU / 957@14 / 20on45 / 390rp	3 months	US\$	8600	p/d
Jun 19	EF Eldra 1338 TEU / 925@14 / 19on49 / 449rp	7.5-10 months	US\$	8600	p/d
Jul 19	As Filippa 1338 TEU / 918@14 / 19on52 / 449rp	10-13 months	US\$	8750	p/d
Aug 19	Warnow Whale 1296 TEU / 957@14 / 20on45 / 390rp	11-13 months	US\$	9100	p/d

1,700 TEU - GEARED, CELLED

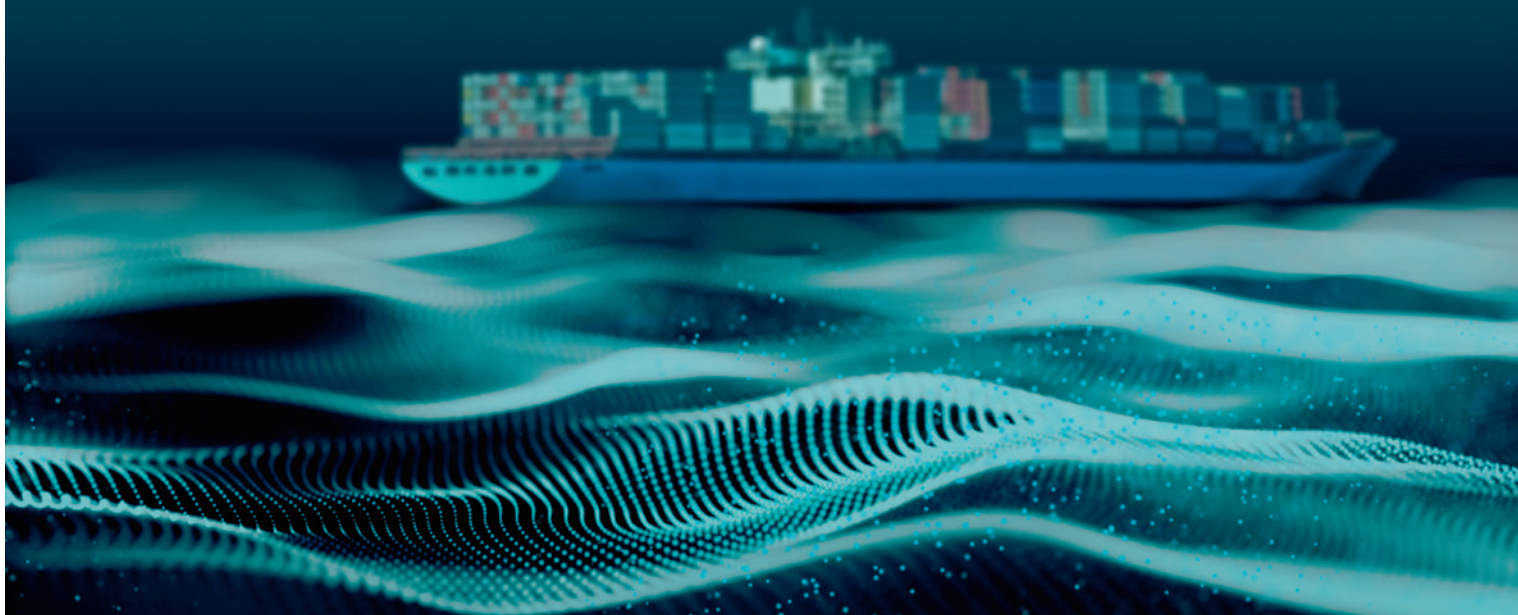
May 19	Sevillia 1794 TEU / 1350@14 / 21on66 / 319rp	3-5 months	US\$	9200	p/d
Jun 19	Okee Ann Mari 1740 TEU / 1295@14 / 21on64 / 300rp	12-14 months	US\$	9600	p/d
Jul 19	Bomar Victory 1678 TEU / 1295@14 / 21on67 / 400rp	18-25 months	US\$	9600	p/d

2,500 TEU - GEARED, CELLED

Jun 19	Ocean Promise 2550 TEU / 1850@14 / 22on87 / 600rp	8-10 months	US\$	10500	p/d
Jul 19	Balsa 2546 TEU / 1870@14 / 21on90 / 536rp	3-5 months	US\$	10500	p/d
Jul 19	As Pauline 2572 TEU / 1860@14 / 22on90 / 600rp	3-4 months	US\$	10000	p/d
Aug 19	Virginia Trader 2490 TEU / 1820@14 / 22on86 / 370rp	6-9 months	US\$	9750	p/d
Aug 19	Minerva 2339 TEU / 1780@14 / 19on48 / 500rp	11-13 months eco ship	US\$	13500	p/d

DIGITALIZATION WAVE

Are you being left behind?



The shipping and freight industry, being over 5,000 years old, is one of the oldest industries in the world. Notwithstanding, it remains a most vital component for a country's trade, growth and economic viability. It is responsible for approximately 90% of the world trade and is the life line of the global economy. Although it has gone through several changes throughout the years, from bigger, faster ships to containerization of cargo, it still lags behind in embracing new technologies that have become second nature in other markets. In the 1960s that containerized cargo transformed the shipping industry, creating a boom in world trade and made significant contribution to the concept of trade globalization.

In this new era, digitalization offers the opportunity for players in the shipping industry to strengthen their relationships with customers and lower their operational costs. The industry should seek to adopt a structured approach to defining a digital vision and identify ways of integrating new technologies and capabilities into its traditional operations. Consumers have become accustomed to instant satisfaction

when engaged in business transactions, and therefore there is increased consumer demand for speedily delivered goods, and continuous means of communication. Any gap in communication can lead to serious loss in the value of service provided to the consumers and stakeholders. Many industries now recognize the power and importance of technology in this era of digitalization.

The industry should seek to adopt a structured approach to defining a digital vision and identify ways of integrating new technologies and capabilities into its traditional operations

IT IS NOT TOO LATE TO GET STARTED

The industry is still in the early stages of digitalization which is increasingly considered one of the key solutions to the many challenges being faced today. A variety of key players are adopting digital technology to provide a seamless flow of information and documents among all stakeholders including shippers, carriers, terminals, forwarders, and port authorities. Effective coordination and collaboration among these various entities are essential if a supply chain is to function properly.

Game-changers in the industry are

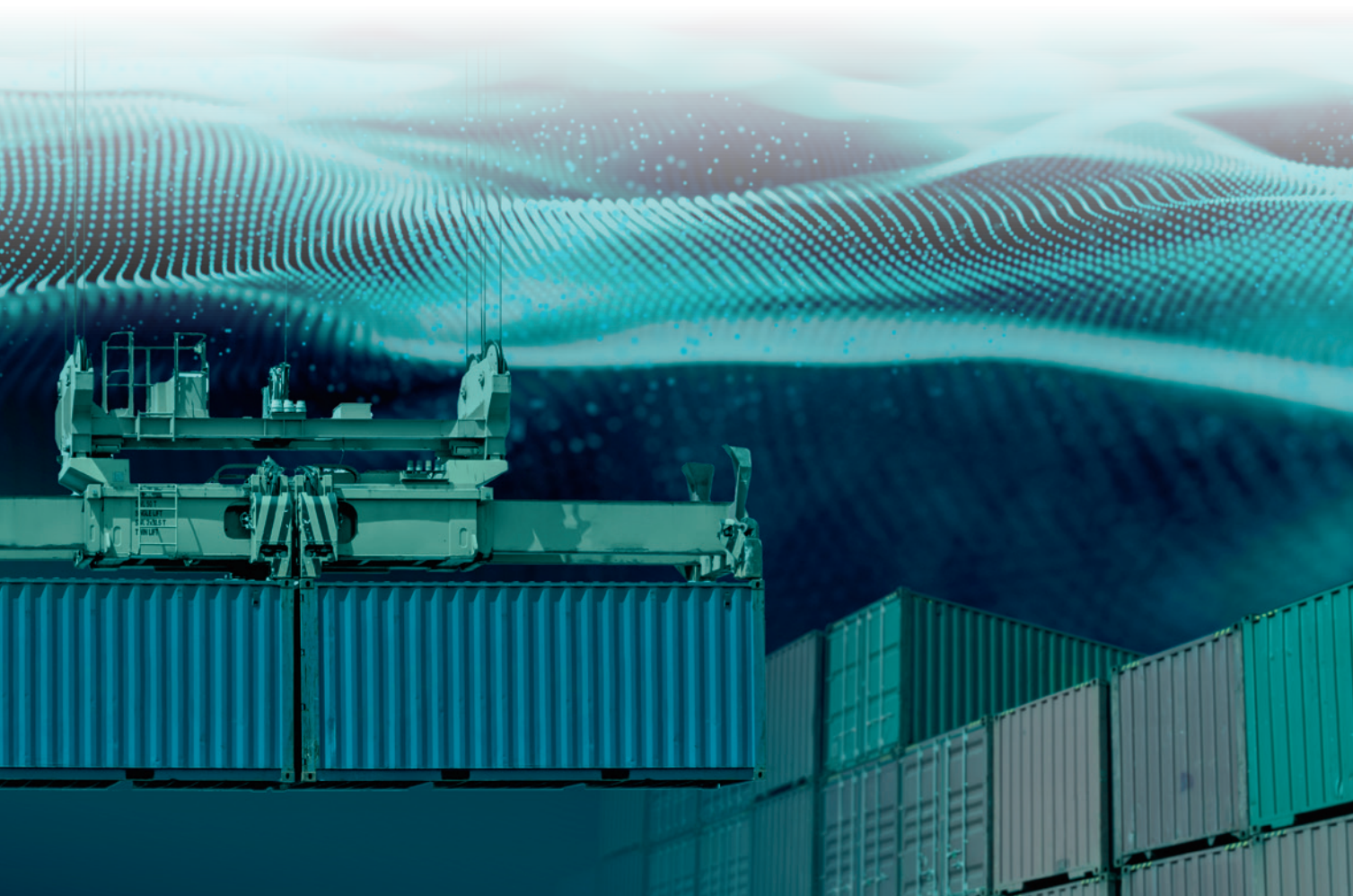
transforming the lackluster customer experience by adopting an interactive online portal. Companies are focusing on consumer-demands for end-to-end visibility, digital documentation handling and gaining access to information virtually anywhere and at any time, allowing them to stay in control of all their shipment and cargo. These improvements are the foundation of the customer's journey and a key contributor to an enhanced customer experience. Moving away from the traditional offline quotation and manual booking process, businesses are undertaking progressive digital business models to overcome operational challenges. For instance,

by implementing a digital portal for 24/7 accessibility by all stakeholders, suppliers and customers providing real-time cargo data, digital dashboards, automatic notifications and online document sharing.

RESISTANCE

Despite such significant achievements in digitalization, there are many who are slow to embrace technology due to their resistance to change. This contributes to the shipping industry lagging behind other industries in the adoption of innovative technological solutions, hence creating bottlenecks in the supply chain. Embarking on the digital journey does not require an immediate large-scale and expensive overhaul of IT systems. Organizations should begin by gradually enhancing and integrating their different systems. Digitalization will continue to gain momentum in the upcoming years and will shape the industry's future in every respect.

Despite such significant achievements in digitalization, there are many who are slow to embrace technology due to their resistance to change





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