

Caribbean MARITIME



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ISSUE No 33
JANUARY - APRIL 2018

STORM PLANNING

TIME FOR A RETHINK

BELIZE CRUISE

A QUESTION OF SPACE



TOWAGE REPORT IN OR OUT? IT'S A TUG OF WAR

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caribbean shipping association

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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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Coming together today for the sake of tomorrow





Embracing new technology to improve efficiency

There is no doubt that 2017 was another challenging year for the shipping industry in the region and also in the wider global context. Persistent overcapacity, weak global trade and freight rate volatility continue to create stormy waters that test our resourcefulness.

The fact that we have weathered the storm is testament to our resilience in the face of significant change. And while there are some encouraging signs trending towards improved market conditions and stability, we must acknowledge that we have a fair distance to go before we can realise this outcome. So as we forge ahead with a healthy dose of cautious optimism, we must adequately plan for the difficulties ahead and take the long-term view to ensure the viability of the industry.

PREPARING FOR THE FUTURE

In adopting the long-term view, it is important that we focus our attention on the developments that will shape the future of the sector. The shipping industry has long had the reputation of being conservative and slow to change, but I do believe that many of the players increasingly understand the value and necessity of staying on the cutting edge.

It is certainly in our best interest to embrace doing business in the technological age. To continue to hold on to analogue processes in the fast-paced, digital maritime ecosystem of today will only

ensure that we are left behind. The industry is poised for great transformation in the months and years to come; and we must position ourselves to take advantage of the opportunities that arise.

A considerable portion of the groundwork for this transformation has already begun with developments that link e-commerce with the logistics supply chain. This has brought us to the cusp of what some industry experts are calling 'revolutionary' – blockchain technology.

DELIVERING GREATER EFFICIENCY

Blockchain technology has been gaining significant traction across various industries, with shipping taking a particularly keen interest. This is so because this solution has the potential to save the global shipping industry billions of dollars.

The appeal of blockchain technology lies in its ability to allow the industry to go paperless while enabling all parties to benefit from a transparent and secure online environment throughout the supply chain. The management of all transactions is decentralized, as it takes place collectively by the network of participants in a peer-to-peer environment.

IBM and Maersk are currently partnering to use blockchain technology to manage and track the paper trail of millions of shipping containers across the world. Also, the Israeli container shipping company ZIM recently completed a successful trial of a



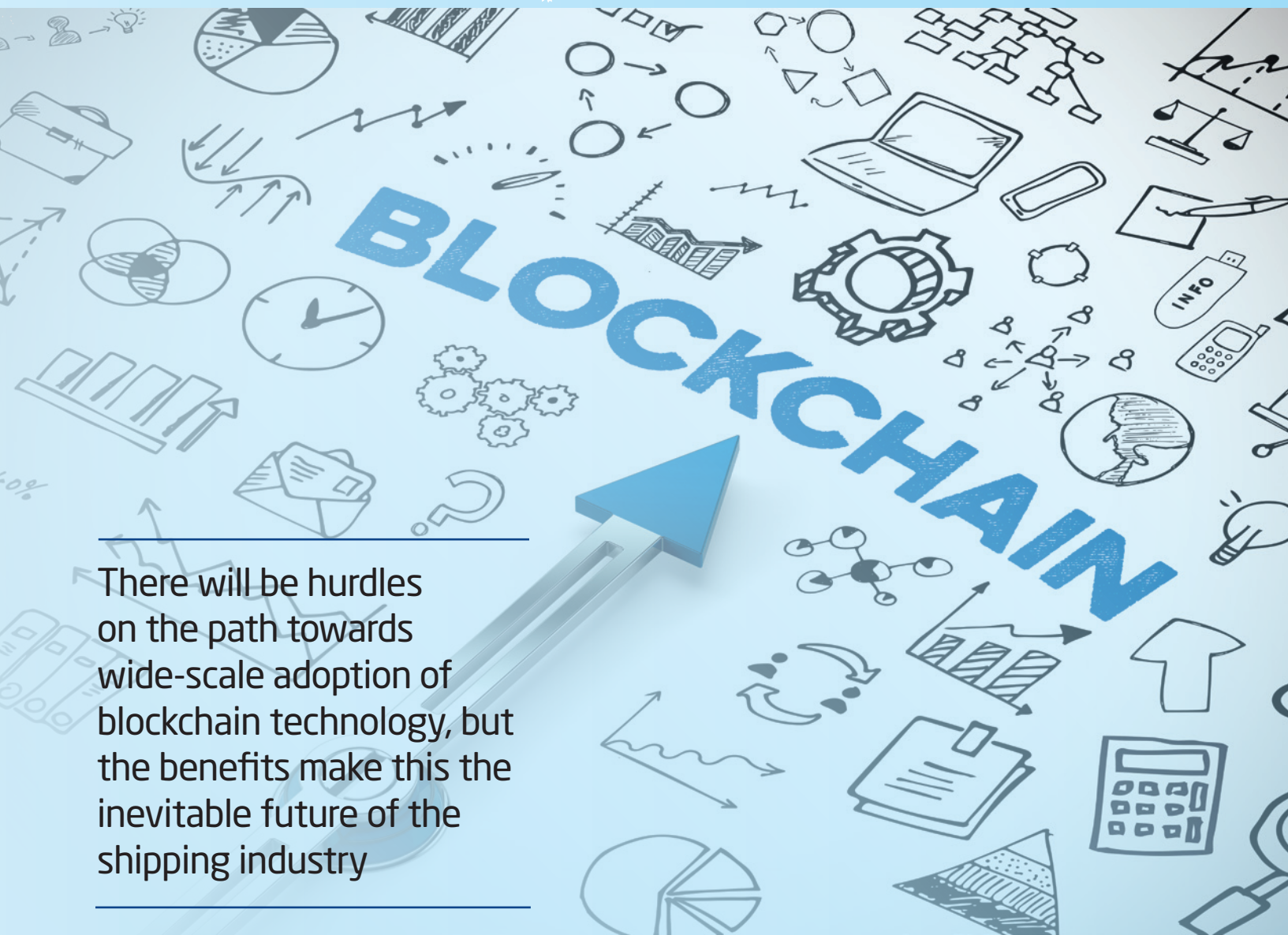
David Jean-Marie
President
Caribbean Shipping Association

blockchain solution to carry out paperless bills of lading in which all parties in the supply chain received original electronic documents.

Most of the shipping sector's transactions are currently paper-based. IBM estimates that the cost associated with document processing and administration can be as high as a fifth of the physical transportation costs. And this figure increases when paperwork is delayed, lost and altered.

Blockchain technology promises to reduce paper-related expenses through the creation of a permanent and transparent database that can be accessed by all relevant parties. All parties need to agree before a transaction can be confirmed or modified, making it a secure platform to exchange sensitive documents and even transfer funds.

So the benefits of this new technology are clear – it can reduce fraud and errors, cut down on the transit time of goods, improve inventory management, reduce costs and eliminate waste. The advantage of making calculations, approvals and other transactions automated and paperless is, indeed, a powerful selling point of this solution.



There will be hurdles on the path towards wide-scale adoption of blockchain technology, but the benefits make this the inevitable future of the shipping industry

POINTS TO CONSIDER

Although the application of blockchain technology in the shipping industry is far from achieving maturity, there is enough evidence to support being an early partner in this evolution of maritime commerce. Preparing to adopt the technology early has the potential to ultimately increase your competitive advantage.

During this period of preparation, it is useful to consider several questions that might arise from the deployment of this

technology. Will the level of automation that can be created by blockchain eventually replace a significant number of jobs in our region? If so, how do we deal with this issue? What kind of capital outlay will be required and will it be within our reach?

There will be hurdles on the path towards wide-scale adoption of blockchain technology, but the benefits make this the inevitable future of the shipping industry. It has the ability to increase profitability and positively impact vessel operating efficiency

and our environmental footprint.

The coming year and beyond will certainly prove to be an equally challenging and exciting time, as shipping becomes more closely aligned with the wider supply chain. I believe that any progress we make will be predicated on working together to strengthen our position and actively taking steps to mitigate industry challenges. I look forward to participating in this concerted effort to maintain our viability and competitiveness in the global industry.

HARBOR VIEW



THE PORT OF BELIZE

A bird's-eye view of the facilities at the Port of Belize. The container yard covers 15,100 square meters and has a capacity of 2,000 TEU for empty containers and about 1,200 TEU for loaded containers. There is also a transit shed of 6,583 square meters. The port has a draft of 28 to 33 ft (8.5 to 10.0 meters) and a pier length of 2,500 ft (800 meters). The commercial port is regulated by Belize Port Authority.



17TH ANNUAL CARIBBEAN SHIPPING EXECUTIVES CONFERENCE

FORT LAUDERDALE 14-16 MAY 2018

- The CSA's 17th Annual Caribbean Shipping Executives Conference is to be held at the Hilton, Fort Lauderdale.
- Two-day conference (14-15th May) followed by half-day Disaster Awareness Workshop (16 May).
- Please contact the CSA Secretariat in Kingston (details below) or visit the CSA website www.caribbeanshipping.org for further details about speakers and to register for this key networking event.
- CSA members enjoy preferential rates. There are also early-bird registration discounts and concessionary hotel rates.



caribbean shipping association

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CSA RESPONDS TO HURRICANE APPEAL AS REGION COUNTS COST

In just a few short days in September, the Caribbean was hit by two catastrophic Category 5 hurricanes – first Irma, then Maria.

The pair caused widespread damage across the region, with Puerto Rico, the British Virgin Islands, the United States Virgin Islands, Anguilla, Cuba, the Turks & Caicos Islands, Sint Maarten / St Martin, St Barts, Barbuda and Dominica among the worst affected.

The Caribbean experienced four categorized hurricanes in 2017 and some islands were hit by more than one. Irma was the second most powerful on record and the first Category 5 hurricane to strike the Leeward Islands. Subsequently, Maria created the worst natural disasters ever to befall Puerto Rico and Dominica.

The loss of life across the Caribbean, along with the hurricanes' impact on both property and basic infrastructure, is well documented. Unfortunately, the restoration process – the hard task of rebuilding of homes and livelihoods – has been less well publicized by the media.

The response from the international community – especially from the armed forces and various government agencies – to the plight of the people in the affected islands was generous and immediate. And, as would be expected, this generosity was matched by members of the Caribbean Shipping Association and by the organization itself.

The CSA has a proud record in recent times of providing financial and other assistance to hurricane-impacted communities across

the Caribbean and in this regard 2017 was no different – except that on this occasion the damage caused was more costly and extensive.

As it turned out, September's hurricanes came just prior to the Annual General Meeting in Barbados and this proved a timely forum for CSA members to give a collective response. So, gently encouraged by their entertaining master of ceremonies, Stephen Bell from Seaboard Marine, attendees at the gala dinner were invited

to dig deep and contribute to the CSA's disaster relief fund.

The amount raised during the evening was over US\$ 100,000 with notably large donations by David Jean-Marie and David Harding (from hosts Barbados Port Inc.) and personally by Roland Malins-Smith (see also Page 39 of this issue) while many, many others chipped in with corporate and individual pledges. These contributions were gratefully received and will now be put to good work.

The CSA has a proud record in recent times of providing financial and other assistance to hurricane-impacted communities across the Caribbean and in this regard 2017 was no different





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AGM SPOTLIGHT ON PORT AWARDS

The prestigious Port Awards were announced at the Diamond Gala which was the culminating event of the CSA's 47th Annual General Meeting, Conference and Exhibition.

Held in Bridgetown from 9 to 11 October and attended by more than 350 delegates, the event was hosted by the Shipping Association of Barbados and Barbados Port Inc.

WINNERS

The winners of the Port Awards are as follows:

CONTAINER TERMINAL OF THE YEAR

DP World Caucedo

LUDLOW STEWART MULTIPURPOSE TERMINAL OF THE YEAR

Guadeloupe Port Caraïbes

DEPENDABILITY & FLEXIBILITY

Port of Point Lisas

EFFICIENCY & PRODUCTIVITY

Port of Cartagena

GROWTH, DEVELOPMENT & IMPROVEMENT

Kingston Wharves Limited

ENVIRONMENT & SAFETY

Grand Port Maritime de Guyane

SECURITY

Port de Galisbay, Saint-Martin



DP World Caucedo



Guadeloupe Port Caraïbes



Port of Point Lisas



Port of Cartagena



Kingston Wharves Limited



Grand Port Maritime de Guyane



Sterling support for women in search of a maritime career



WiMAC (Women in Maritime Association Caribbean) was launched in Montego Bay, Jamaica, in April 2015. It is the youngest of seven regional associations of female maritime professionals established under the banner of the International Maritime Organization.

The aim of these associations is to provide a forum for networking and advocacy in support of the IMO's own program for the integration of women in what is still a highly traditional and male-dominated industry.

WiMAC is governed by an eight-member general council led by the president, Claudia Grant of Jamaica. Other members are from Trinidad & Tobago (two), Jamaica, Suriname, Antigua & Barbuda, Belize and the Cayman Islands. The president and general council serve a two-year term and may be re-elected.

The inaugural conference of WiMAC was held in Montego Bay in 2015 and its first annual conference was in the Cayman Islands in September 2016. The next annual conference is to be held in Belize in 2018. This will probably be in September but the date has not been finalized.

IMPETUS

The impetus for WiMAC was born out of the 2nd Maritime Women Global Leadership Conference hosted by the World Maritime University (WMU) in Malmö, Sweden, in the spring of 2014. Jamaica was invited to participate in this conference and to present a Regional Perspective. Its conference paper, 'Women in the Maritime Sector: Surviving and Thriving in a Man's World – a Caribbean Perspective', was the result of a joint collaboration between the Maritime Authority of Jamaica and the Caribbean Maritime Institute. The findings of this paper were informed by a survey conducted in



ABOVE: Claudia Grant, president of WiMAC

eight Caribbean states – Anguilla, Antigua & Barbuda, Barbados, Belize, Guyana, Jamaica, Suriname and Trinidad & Tobago – involving some 40 female maritime professionals from various sectors of the industry. One of its recommendations was the need to establish a network of national/regional associations in order to:

- Unite women as a cohesive force for change and development
- Monitor standards and initiatives to encourage gender equity
- Promote the maritime sector as a viable career for women, including access to training
- Identify and promote job opportunities.

These findings were very much in line with the IMO and its strategy under the Integration of Women in the Maritime Sector Program. In response to the survey, the director general of the MAJ, Rear Admiral Peter Brady, formally asked the IMO to assist the Caribbean Region in setting up its own network of regional female maritime professionals.

In response to specific questions from CM, a spokesperson for WiMAC gave us the following answers:

Q. The CSA was one of the first such organisations to elect a female president – Corah-Ann Robertson-Sylvester – but there have been surprisingly few high-profile female members of the general council or higher since then. Why is this?

A: We could not say for sure what the issues are, but in conversation with a number of our colleagues, it's a combination of issues:

- Elements of the proverbial glass ceiling are still prevalent and interested female executives/professionals could perceive a lack of support from the 'boys club'
- In some cases it could well be simply lack of interest in ascending to the highest level of leadership
- Absence of a serious lobby to catapult women to the forefront so that they don't have to go it alone. This is a void which can be a call to action for WiMAC.

Q. What is WiMAC doing to attract more women into the maritime sector?

A: WiMAC recognizes there is a general lack of awareness among the average Caribbean national as to the potential career opportunities in the maritime industry. We have therefore included, as one of our strategic objectives, activities to increase awareness. Thus, schools will be targeted to influence career choices. We are also aware that women have entered the industry and have either left or do not see any prospect

for advancement. We have therefore also included programs for mentoring and training and education to support and equip women in order to increase their contribution and participation in the industry. The following has also been done:

- Established partnerships with the Jamaica Ministry of Education, the Caribbean Maritime University (CMU) and over 200 secondary schools in Jamaica to promote the maritime sector and to make the secondary school students aware of the many career opportunities in the maritime and associated industries.
- In conjunction with the Ministry of Education, the CMU and WiMAC have pioneered with the Caribbean Examinations Council (CXC) the introduction of Logistics Operations Management as an additional subject in the curriculum. This subject will be offered in Caribbean Advance Proficiency Exam (CAPE) CXC examinations in 2018 in the Caribbean.

- WiMAC has developed a vibrant outreach program to be offered in schools across the Caribbean. At our inaugural conference in Cayman, a team of ladies visited prominent schools and colleges to promote the industry. This will be a permanent feature of WiMAC conferences.

Also in the offing, in a bid to rekindle interest in science and engineering subjects for our next generation, WiMAC, CMU and the Ministry of Education will launch a national SeaPerch [underwater robotics] program as an important part of the solution. This will take place in January 2018.

Q. Across the Caribbean, do you see any role models for aspiring women entering the shipping industry?

A: There are a number of women who have achieved a level of prominence in the industry and also a number who have broken barriers and these include:

- Corah Ann Robertson-Sylvester, president of Seaboard Jamaica and the first and to date only female president of the Caribbean Shipping Association
- Ann-Marie Chapman, first and only female marine pilot, Trinidad & Tobago Pilots Association
- Hortense Ross-Innerarity, first female Superintendent of Pilotage, Jamaica.



ABOVE: (top) Ann-Marie Chapman and Hortense Ross-Innerarity

RIGHT: Corah Ann Robertson-Sylvester, the first woman to become president of the CSA





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PROFILE WOMEN IN MARITIME ASSOCIATION CARIBBEAN (WIMAC)

- Claudette Rogers, director general, Maritime Authority, Guyana
- Antonette Wemyss-Gorman, commanding officer of the JDF Coast Guard
- Merlene Martinez, ports commissioner, Belize Port Authority
- Denise Lynfatt, first female president, Shipping Association of Jamaica.

This list is by no means exhaustive and we are currently compiling a database of female mentors for the very purpose of inspiring and encouraging women and girls.

Q. WiMAC has close links with the WMU in Malmö. Are there any plans to forge equally close ties with the CMU in Jamaica?

A: Prior to the establishment of WiMAC there has been collaboration with the CMU (formerly the Caribbean Maritime Institute) as the paper which provided the impetus

for our establishment was co-authored by the CMU's deputy executive director. Since that time we have collaborated in other areas. WiMAC and the CMU intend to sign a Memorandum of Understanding to pursue several areas of interest including:

- Joint research
- Expansion of outreach programs in the Caribbean
- Provision of scholarships for needy and deserving female students
- Joint fundraising ventures.

Q. What links does WiMAC have with the Women's International Shipping & Trading Association?

A: So far our link with WISTA is via WISTA Cayman Islands, whose past president is currently on WiMAC's general council. However, we see scope for collaboration in the future.



KEY WOMEN: Corah Ann Robertson-Sylvester at the CSA's 47th AGM with Erica Luke, vice-president of the Shipping Association of Barbados, and Sonja Voisin, MD of Gulf Shipping Ltd

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.

MEMBERSHIP OF WIMAC



WiMAC has 46 members from the following 18 countries: Antigua & Barbuda, The Bahamas, Barbados, Belize, Cayman Islands, Dominica, Grenada, Guyana, Haiti, Jamaica, Martinique, Panama, Saint Kitts & Nevis, St Lucia, St Vincent & the Grenadines, Suriname, United States of America and Trinidad & Tobago.

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

A QUESTION OF SPACE

Belize plans new cruise terminals to cope with larger ships

No one doubts that Belize City needs to improve its access and capacity to cope with the new generation of cruise ships. But how feasible are two schemes recently agreed by the government? Can they both get financial backing? And if so, does Belize City really need two cruise terminals? Gary Gimson reports.

During the second half of 2017 the Government of Belize signed agreements with locally based investors for the construction of two new Belize City cruise terminals. One agreement was with Portico Enterprises and the other with Stake Bank Enterprises, part of the Feinstein Group, a property development company.

Both of these schemes aim to resolve the issues of access restriction and capacity constraint that have held back the development of the nation's cruise sector. Without a solution, and with the ships getting ever larger, Belize City is in danger of losing a slice of its cruise business, of which around 60 per cent is controlled by Carnival.

Cruise ships calling Belize City currently anchor four miles offshore and tender passengers ashore. Clearly, this is far from ideal – for the passengers, for

the cruise operators and for those running shore excursions, a key feature of any port call in Belize.

Moreover, water depths in the narrow One Man Caye Channel, which gives access through the Barrier Reef, mean that new larger vessels cannot even anchor off Belize City. A further problem, once ashore, is that many of the million or so passengers who hop off the tender at the Fort Street Tourist Village (FSTV) and who wish to see attractions outside the city have a tricky bus journey through the congested streets of the nation's so-called Old Capital.

REMEDY

To a lesser or greater extent, both the Portico and Feinstein schemes offer the same remedy – to build new, dedicated, direct berthing cruise terminals a short distance from Belize City.



Talks in progress with Portico Enterprises

Clearly, the more ambitious of the two schemes is the one backed by Portico Enterprises, which aims to establish a new US\$ 150 million cruise terminal called Port of Magical Belize.com. Portico is backed by local tour operator David Gegg and by free zone interests.

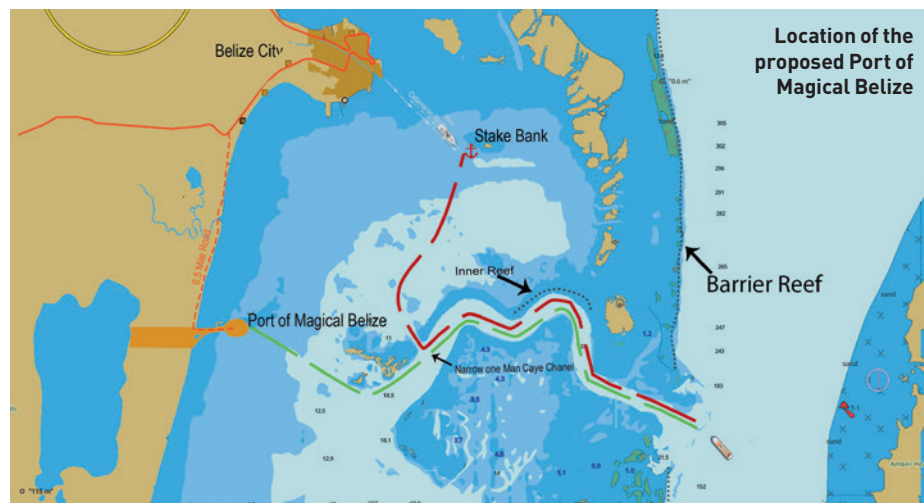
The plan is for Port of Magical Belize to be located on a small peninsula of reclaimed land south of the Sibun River estuary. The plan includes four Oasis-class berths plus a marina, retail space and a water park as well as craft and cultural centers and an aquarium.

Dredged spoil from the new access channel – which will allow ships of up to 12.0 meters draft to call – will be used to create the peninsula. Portico's David Gegg told Caribbean Maritime about his vision: "This will provide us with some 75 acres of additional land area where the majority of the port infrastructure will be located."

BENEFITS

Mr Gegg sees very real benefits for passengers in the proposed location: "Aside from easier and faster access to the traditional shore attractions presently offered by the cruise lines, the land area located within a 10-mile radius of the new terminal provides unlimited opportunities for the expansion of shore excursions, including visits to Peccary Hills National Park."

Having an idea is one thing; realising it is





another. So Portico's proposed timetable looks like this. Environmental assessments and other technical feasibility analysis were due to commence in January. This process will take about six months, after which contracts could be negotiated. It is foreseen that construction could commence in the second half of 2018 with an opening set for 2021.

Mr Gegg is confident the project will go ahead: "I have had multiple meetings with all the major cruise lines and I sincerely believe that they all recognize the qualities of our location and the fact that Belize desperately needs a mainland docking facility." And he is equally bullish about financing the project: "Ideally, a joint venture

keen to participate. Certainly 'call contracts' and/or 'berthing agreements' with cruise ship operators would go a long way in securing the necessary financing.

There are future plans, too. An additional two cruise berths, a 300-room hotel just 30 minutes from the international airport and a water theme park are scheduled for Phase II. Further funding will be required for this work, with 2022 being talked about as a completion date.

CONTRAST

Meanwhile, and in contrast, the Feinstein-backed project aims to build a four Voyager-class capacity cruise terminal at Stake Bank

Caye, located just four and a half miles offshore from Belize City and covering about 15 acres. The idea for such a cruise terminal has been around for some time.

This US\$ 50 million scheme includes a Mayan-themed water park, a 60-slip marina, restaurants and

shops. It is envisaged that the Stake Bank Caye scheme will be linked by causeway to the group's planned Ocean View Grand resort project at North Drowned Caye. It is thought that this causeway awaits government approval.

More importantly, the Stake Bank scheme,

too, requires the building of a causeway to the mainland and it is understood the application for this project has been turned down. The deputy prime minister confirmed this on local television only recently.

So, without the causeway to the mainland, if this project goes ahead then Belize is in effect back to square one, as passengers would still have to use a tender; although for many the attractions planned for Stake Bank/Ocean View Grand might be enough in itself. Many believe, however, that without a causeway, Stake Bank Caye is a non-starter as a cruise terminal.

It's important to point out that the broadly based Feinstein Group is a well-established and serious player in the local tourism sector and was the original creator of the FSTV (now owned by Royal Caribbean and Diamonds International) and a developer of a number large hotels and resorts of which Ocean View Grand is just the latest. So its pedigree is undoubted.

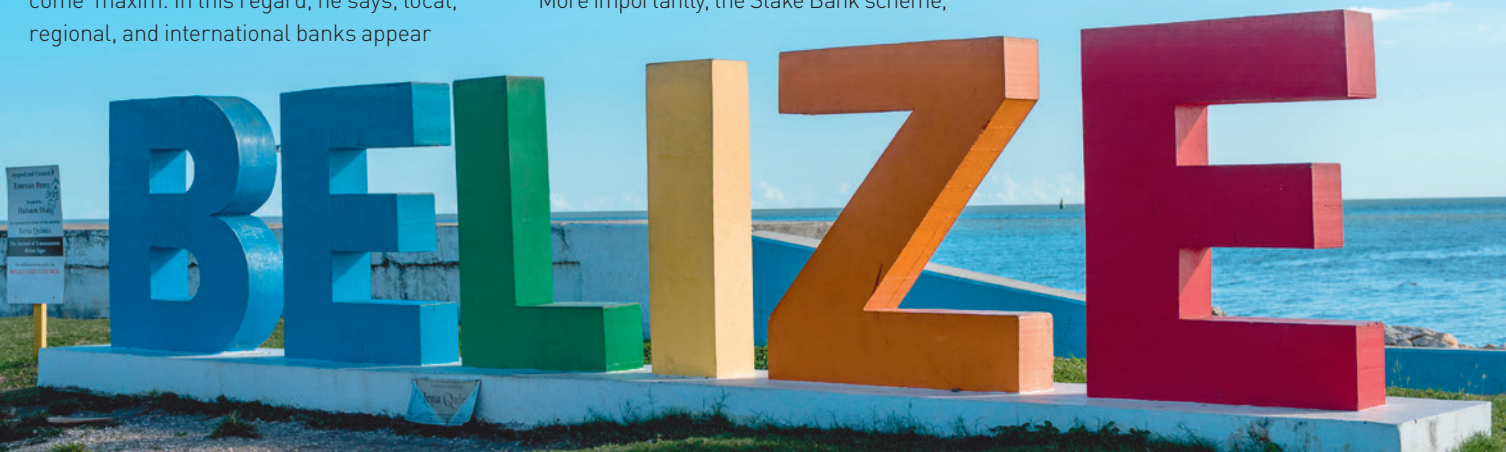
But does Belize City really need two new cruise terminals? Probably not. And that's why only one is likely to get built. The question is, which?

See Caribbean Maritime issue 22 for a report on Harvest Caye – Norwegian Cruise Line's own terminal and resort development in southern Belize.

The plan is for Port of Magical Belize to be located on a small peninsula of reclaimed land south of the Sibun River estuary

with a cruise line partner or credible international player is what is most needed and we are certainly pursuing such an option."

Failing that, and mindful of Belize's huge untapped cruise potential, Mr Gegg is a great believer in the 'build it and they will come' maxim. In this regard, he says, local, regional, and international banks appear



EXPERTS LOOK AT HOW REGION CAN NAVIGATE TO 'GREEN PORT' COMPLIANCE

The responsible and eco-friendly disposal of maritime waste is an agenda-topping issue for port authorities everywhere - and it's a matter of particular concern in the Caribbean region, which has been struggling to comply with the requirements of the international marine pollution (MARPOL) convention. In the following two articles, some ideas on how the Caribbean can negotiate its way through to regional compliance are put forward by experts in this field.

Implementation of MARPOL in the Caribbean

By Alejandro Trillo*

The Caribbean has been designated a MARPOL Special Area since 1991, with garbage discharge requirements coming into force in May 2011. Yet only about a quarter of countries in the region have introduced the minimum legislation to enforce MARPOL. A region-wide enforcement plan is clearly needed.

In 2010 the Marine Environment Protection Committee of the International Maritime Organization adopted IMO Resolution MEPC.191(60). This resolution established 1 May 2011 as the date for entry into force of the garbage discharge requirements for the Wider Caribbean Region (WCR) Special Area under MARPOL Annex V.

A Special Area is defined under MARPOL Annex V as an area for which stringent requirements apply to the discharge of garbage from ships. The WCR was designated as a Special Area under MARPOL Annex V in 1991 but the discharge requirements did not take effect immediately as adequate port reception facilities were not available in all ports within the WCR region.

In May 2017 I was honored to attend the conference 'Implementing MARPOL in the Caribbean', organized by the North American Marine Environment Protection Association (NAMEPA) and WISTA Cayman Islands. The goal of this conference was to bring major stakeholders in the region together on the issue of MARPOL. The presence of key regional stakeholders showed that there is a growing interest in establishing suitable port reception facilities for sustainable waste treatment in the region.

While 86 per cent of Caribbean countries have ratified MARPOL, only an average of 25 per cent have implemented the minimum required legislation to enforce MARPOL in the region. This makes countries particularly vulnerable to maritime accidents and makes it difficult for shipping companies to comply with environmental regulations and environmental

standards, thus reducing competitiveness.

Since the first attempt to designate the WCR as a special area, 26 years ago, the region has dramatically increased its relevance in the maritime arena. Today, there are 351 ports, 16 oil refineries, 51 tanker terminals and over 15 different types of ships transiting.

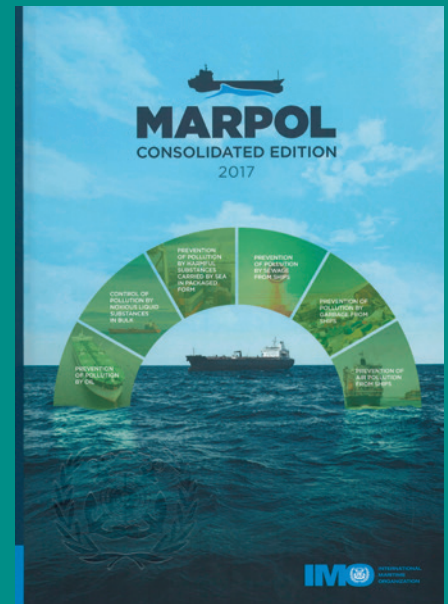
Additionally, the Caribbean has claimed the crown as the world's top cruise destination, representing 33.7 per cent of the global marketplace.

CHALLENGE

Reality strikes when only a few countries accept oily waste, fewer accept sewage, most accept garbage but with significant restrictions (organic materials, biomedical, hazmats). It becomes a challenge to tackle ship's waste management when domestic waste management generated inland is a common challenge every day for many islands where the only option is landfill disposal. There is a widespread fear that additional waste from ships will overfill the landfill.

When it comes to more elaborated waste-streams like oily waste (MARPOL Annex I related) or hazmats, the lack of infrastructure is more evident. It is necessary to create a regional plan to enforce MARPOL in order to make its implementation more feasible. Lack of proper infrastructure close to the ports for treating food-related waste brings a concern that garbage landing will bring sanitary risks that could damage the agriculture sector.

The creation of infrastructure for recycling and treatment of ship-generated



waste will help to improve waste management solutions for inland waste generation. If the port reception facilities are delegated to the private sector – as in most ports in the world – clear legislation should be put into place to bring a solid framework for such investments. A regional plan that implements policies for full compliance in the Caribbean, such as Europe's port compulsory environmental fees, would incentivize proper waste disposal and would increase the economic feasibility of port reception facilities.

***Alejandro Trillo is co-founder of the first MARPOL port reception facilities at 13 ports in Mexico and Argentina. He is a board member of NAMEPA and director for sustainable maritime solutions at Stericycle México.**



Green logistics and port reception facilities: a key to competitiveness

By Cristina Rechy, Jorge Durán and Mona Swoboda

The Greater Caribbean Region has been designated a Special Area under Annex V of MARPOL, indicating the need to address marine port inefficiencies in environmental sustainability. The Inter-American Committee on Ports* argues that, in order to compete at international level, the Caribbean nations must introduce more efficient and environmentally sustainable practices.

The member states of the Inter-American Committee on Ports of the Organization of American States (OAS) are working together to develop an efficient and sustainable port sector by strengthening inter-American cooperation, sharing practices and institutional technical capacities, offering capacity building programs and fostering public-private partnerships in six priority thematic areas, including sustainable port management and environmental protection.

Port modernization strategies must be accompanied by appropriate policies and regulations that encourage innovation for existing infrastructure, including port reception facilities (PRFs).

Environmental sustainability is a driving factor of the maritime industry, especially as green operations add comparative advantages for marketing purposes. The concept of green logistics combines logistics performance and environmental sustainability as complementary objectives in national agendas.

The amount of solid and liquid waste from ports varies depending on the nature of their operations, the types of vessels served and other regional factors. Several ports in the Americas have successfully implemented green operations, including PRFs, and while they provide excellent models to replicate, many ports in the hemisphere are struggling to comply with the demand for a greener performance. The Greater Caribbean Region, for instance,

has been designated a Special Area under Annex V of MARPOL, indicating the need to better address marine port inefficiencies in environmental sustainability, where operational and legislative differences between countries generate a large disparity in the management of cargo residues and waste.

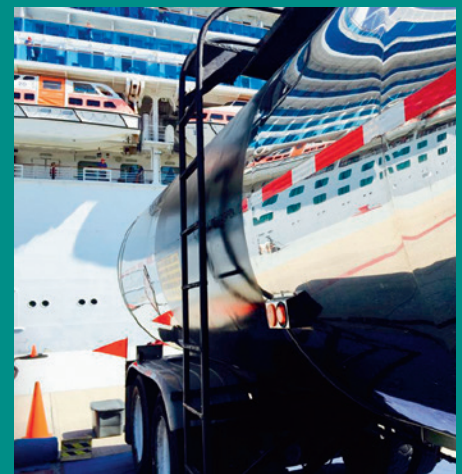
ISSUES

Green PRFs should follow ISO 16304:2013 guidelines on the management of ship-generated waste regulated by MARPOL that is discharged at ports and terminals. It addresses the issues to be considered in:

- The development of a port waste management strategy
- The design and operation of PRFs
- Port Waste Management Plan development, implementation and compliance;
- PRF management and accountability.

The strategies presented here are key elements in the operation of PRFs as they are internationally standardized guidelines aimed at increasing their efficiency and directly regulating the procedures needed to comply with the demand for a greener logistic performance.

The Port Authority of Jamaica (PAJ), for instance, as a MARPOL 73/78 signatory, has procedures in place to accept ship-generated waste excluding medical and food waste. The collection and disposal of solid and oily wastes are carried out, respectively,



by the National Solid Waste Management Authority and by private licensed contractors. The opportunity exists for waste collection from cruise ships with a subsequent potential to generate biofuel that may incentivize LNG cruise vessels to include Jamaica as a port of call since they would be able to bunker and dispose of waste. These upgraded procedures open the way to a reduction in operational costs and improvements in logistics, thus benefiting end-users and appealing to prospective ones.

In today's globalized world, Caribbean nations must address marine port inefficiencies with cost-cutting, efficient and environmentally sustainable technologies and operational practices, including PRFs, in order to increase their national and regional economic competitiveness. Thus, it is vitally important for countries which ratified MARPOL to implement this international standard in the most appropriate way.

***The Inter-American Committee on Ports (CIP) of the Organization of American States. The secretary of the CIP is Jorge Durán, one of the authors of this article.**

TIME FOR A RETHINK ON STORM PLANNING

Three lessons learned from our unprecedented hurricane season

The year just gone was one that posed many crises for the Caribbean. The greatest challenges for the region in 2017 were dealt by mother nature herself in an unprecedented hurricane season featuring 17 named storms, 10 of which became hurricanes. The season was the costliest on record, causing an estimated US\$ 316.5 billion in damages. Islands overwhelmed by storms months ago are still reeling from loss of shelter, power and fresh water for their inhabitants.

Images of the devastation, seen either first-hand or through the media, will forever be etched in our hearts and minds. Yet, through the fog of emotion and loss, we must be reminded that these storms have brought out the best in our community and several salient lessons have been learned.



By **William Lusk**
Program Manager,
O.C.E.A.N.S. LLC

LESSON #1

PREPARE FOR POST-EVENT CONGESTION

Many ports around the Caribbean were ill prepared to receive aid in the days and weeks following the hurricanes. While crises of this magnitude cannot be prevented, we can do a better job of preparing for the massive influx of aid. Although well intended, this flow of aid cargo and personnel can quickly congest a port, reducing efficient movement to get supplies where they are needed.





“Because of the close relationship between St Lucia and Dominica, the outpouring of support was overwhelming,” said Karen Lawrence-Joseph, general manager of M & C Shipping. “Island-wide we’ve had supermarket drives where barrels were placed so Dominicans could receive this aid. I was proud of my fellow citizens with the level of support to Dominica.” The mobilization of St Lucia’s citizens was unmistakable, as 30 containers of relief cargo were shipped to Dominica within just weeks following Hurricane Maria.

Dominica had reduced capacity to handle the volume of relief handed to them, as warehouses were severely damaged. Containers could not be moved quickly to those who needed the supplies, leading to mass congestion on the port property. “Ports and shippers should plan to prioritize aid shipments with a focus on water, food, medicine, fuel and construction materials,” advised Mike Edgerton, of Hudson Trident, a maritime security consultancy. “This prioritization should be carried out in consultation with the relevant government agencies.”

And Ms Lawrence-Joseph cautioned: “Governments have to start paying attention. Relief is going to come, and as a cargo community we will respond. However, we need mechanisms on the receiving end to ensure that when cargo gets there it can get to those who need aid the most.”

Indeed, the community did respond. However, some of the inability of ports to prepare for arrivals was due to the lack of notice received. Capt LaDonn Allen, prevention chief for District Seven of the United States Coast Guard, said his District, in conjunction with Sector San Juan, had assumed responsibilities for marine transportation system recovery and vessel arrivals in San Juan

and the US Virgin Islands following the devastation of Hurricane Maria. “Ships were coming into port full of relief supplies, without an advance notice of arrival and coordinated berthing,” said Capt Allen. “Sector San Juan diligently coordinated with the port authority and the facilities to reopen ports quickly and ensure needed supplies could be delivered.”


LESSON #2

REEVALUATE RELATIONSHIPS WITH CRITICAL SUPPLIERS

The Caribbean is a unique geopolitical environment, largely without strong manufacturing bases. Successful recovery after a crisis is dependent on commercial shipping to transport aid to affected areas. Even if it can be assumed that a port will have minimal congestion issues, it does not guarantee prompt relief if vital supplies are not available.

Stakeholders must prepare for shortages in items not typically stored by local distributors and retailers, namely construction materials. Ms Lawrence-Joseph said that tarpaulins and generators, for example, were priority relief commodities that were difficult to procure for aid. “The big challenge for us was supply,” she said. “When it came to food and water, we were able to meet demand. Building supplies and generators had insufficient stock.”

Due to these limited reserves of certain essential supplies around the Caribbean, Mr Edgerton urges maritime stakeholders to be preemptive in their preparation. “Ports should consider identifying potential sources of temporary lighting, power and cameras that



The Caribbean is a unique geopolitical environment, largely without strong manufacturing bases. Successful recovery after a crisis is dependent on commercial shipping to transport aid to affected areas

could be quickly deployed in the event of major hurricane damage. Companies may want to consider entering into contracts that can be activated when necessary with predetermined rates and equipment requirements,” he advised. “Also consider communications equipment and hardware, which are also not commonly stockpiled in the Caribbean.”

LESSON #3

OUR SAFETY AND SECURITY IS INTERTWINED

Through the power of the internet and mass media, the world has witnessed the strength and resolve of the Caribbean people. Without a doubt, they served as examples for others to follow.

“Although they will walk miles to a river to clean themselves and their clothes, they are in excellent spirits. I must say they’ve been dealt a blow but aren’t knocked down and out,” said Ms Lawrence-Joseph.

And Frederick Dolbow, of the US Coast Guard’s Sector Maryland-National Capital Region, said: “While in Puerto Rico and the Florida Keys I was most impressed with the local residents’ resolve and love for their community and their neighbor. The disaster seemed to bring people together.”

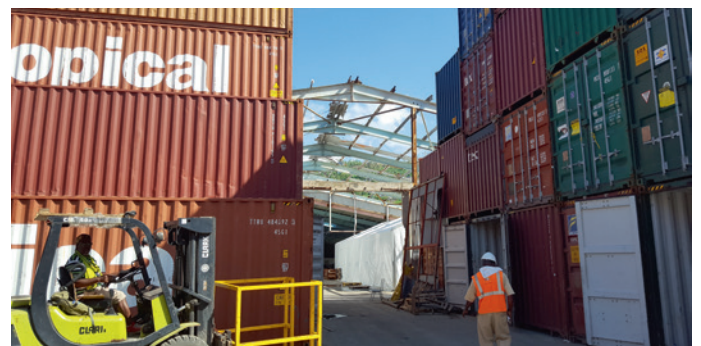
The North Carolina-based Coast Guard Cutter ‘Elm’ delivered field rations and thousands of gallons of diesel fuel and bottled water over two visits to Vieques, off Puerto Rico. Lt Cdr Kellee Nolan, the buoy tender’s commanding officer, said: “The sentiment from the mayor and deputy mayor was from gracious thanks and gratitude that the US Coast Guard was the first agency able to respond. It was a great time to be in the Coast Guard and do what we do best.”

King Ocean Services and Geest Line are among the many companies that have provided complimentary services post-hurricanes to ship aid to the region’s hardest-hit areas. Sacrificing profit, they understood that carriers need to invest resources to catalyze recovery.

It is time to take that spirit one step further.

It is time for Caribbean governments and maritime stakeholders to plan on a holistic basis, for islands are too small to tackle problems on an individual level. The commercial maritime community serves as an excellent reminder that action beyond traditional roles and barriers is necessary to improve regional resiliency. Let us, the Caribbean maritime community, come together before the start of 2018’s hurricane season. Reintroduce yourself to first responders of the areas you serve. Reevaluate your emergency plans. Host a tabletop exercise. Meet your counterparts from competitors and share your experiences.

Our safety and security is intertwined. Together we will fail, or together we will rise.





WE'VE COME A LONG WAY...

President on current role of CMU and its prospects

The organization that officially became the Caribbean Maritime University on World Maritime Day last year has come a long way from its humble beginnings in 1980 as the Jamaica Maritime Training Institute. Here, Professor Fritz Pinnock, who became executive director in 2006, describes the organization's remarkable journey to international status - and the expanded range of opportunities it now offers.



By Professor Fritz Pinnock
Executive Director
Caribbean Maritime University

The Caribbean Maritime University (CMU) is a beacon of great hope and promise, not just for Jamaica but for the Caribbean region. Through strategic partnerships, the impact of the university, as an agent of change in the maritime and allied industries, is felt internationally. This is achieved as a result of leveraging the relevance of its program offerings, its commitment to quality and its thrust for greater internationalization.

It was the late Maya Angelou who said: "I have great respect for the past...If you don't know where you've come from, you don't know where you're going."

This provides a stark reminder that the CMU's future is fueled by its past successes, which have been consistent and noteworthy over the last three and a half decades. It is this rich heritage that will propel it forward to even greater successes in the next five years.





The faculties are specially created to meet the needs of the growing student population and the anticipated growth to be had from international students

HUMBLE BEGINNINGS

The CMU has navigated the long, tortuous journey from its inception on 15 September 1980 to its present elite status as the first maritime university established at the international level in Jamaica. This noble institution, which has endured three name changes in as many decades, began as the Jamaica Maritime Training Institute, operating from 9 Norman Road in two renovated offices, with a total of 30 students. The JMTI was later relocated to the present location of its main campus, Palisadoes Park, Norman Manley Highway, in May 1984.

The next major milestone for the institution occurred in 1990 when training was expanded to embrace the global market. For the first time, non-Jamaican nationals became part of the student population. Then in May 1992 the first Jamaican-born executive director was appointed. In January 1993 the institution transitioned into a statutory body under the laws of Jamaica and was renamed the Jamaica Maritime Institute (JMI).

GRADUAL EXPANSION

Expanding program offerings to meet the needs of the dynamic markets served by the institution has always been a priority. September 1994 saw the introduction of the Diploma in Shipping and Logistics (DISL program), funded by the Canadian International Development Agency. This provided higher education of a specialized nature in a critical growth area. In furtherance of this mandate, in 1997 the institution signed a memorandum of understanding with the University of Technology, Jamaica, establishing an Associate Degree program in Industrial Systems, Operation and Maintenance (ADISOM). Three years later in May 2000 a formal declaration of reciprocal recognition of the Standards of Training Certification and Watchkeeping (STCW

1995) and Certificates of Competency was issued to Jamaica by the UK Maritime & Coast Guard Agency. This positioned the institution as an internationally recognized organization, using Europe as a launch pad. In December of that year Jamaica was listed among 72 countries on the IMO's white list of nations complying with STCW 95, making the JMI the only IMO-recognized institution in the Caribbean.

In 2001 the JMI was renamed Caribbean Maritime Institute (CMI) to reflect the expanded scope of its programs and activities and in 2004 the CMI gained accreditation for the Diploma in International Shipping and Logistics and ADISOM programs from the University Council of Jamaica.

I joined the team in 2006, introducing to the organization the Blue Ocean Strategy, and transformed the marine and professional division to a paramilitary management style with a premium on discipline, employability and alignment to the global maritime and logistics industry. This was to lay the foundation for the rapid growth and development that would precede the attainment of university status. From 2007 to 27 September 2017 we embarked on a relentless campaign to achieve the latter. During this period the CMU accomplished 12 major strategic defining successes:

- Multiple international program accreditation
- Institutional accreditation
- Premier status as a differentiated institution within the saturated local tertiary education landscape
- Attainment of ISO 9001:2008 – subsequently upgraded to 9001:2015
- Numerous awards for quality and leadership
- Growth of over 300 per cent in student population

- Significant expansion of core programs
- Numerous local and international partnerships
- Spearheading of elite sports in education such as rowing, fencing and cheerleading
- Training and certification of key players in the local and international maritime industry
- Moving from bottom to top place as the fastest-growing tertiary institution in Jamaica and the Caribbean
- Investment of over US\$ 1 billion in technology to diversify.

A NEW ERA

On 28 September 2017 the Caribbean Maritime University was born. The CMU brings with it changes in processes, people and prospects. In our chancellor – His Royal Majesty Drolor Bosso Adamtey I – we now have a global leader, entrepreneur, influencer and thinker who is helping us to navigate the vast changing international landscape. The university is organized into five faculties, a school of graduate studies and four centers. These centers are strategically established to align education and training with theory as well as to promote research and development in a bid to meet industry needs and to solve problems through consultancy and through sustainable and collaborative solutions by adopting an oriented approach to improving the maritime and related sectors.

THE WAY FORWARD

The faculties are specially created to meet the needs of the growing student population and the anticipated growth to be had from international students. The Faculty of Marine and Nautical Studies offers programs that provide training for persons wishing to develop a career in seafaring. Students enrolled in these programs are

trained in the rudiments and theory of nautical studies and are taught shipboard operations to the management level. This has always been the nucleus of the institution and will be strengthened as we expand its focus.

There is a drive to modernize and develop the university through technology and to attract and produce technologically sound problem-solvers. In this vein, the Faculty of Engineering and Applied Technology was born. It spearheads engineering-led, research-based academic activities geared towards a culture of applied research. It focuses on multidisciplinary growth areas that are globally relevant such as biotechnology, alternative energy, robotics and integrated engineering.

In order to support the drivers of economic growth and development in the region, the Faculty of Shipping and Logistics was established. This faculty provides salient training in logistics, which is an integral component of every organization but particularly so in production, distribution and trade. The Faculty of Advanced Skills and Professional Development serves primarily customized industry needs and those seeking alternative pathways to educational advancement in a variety of areas.

EMERGING

The School of Graduate Studies and Research is an emerging area of development in which the university is investing to ensure that higher-level studies are undertaken in critical areas of shipping, logistics, maritime studies and related areas. The programs, including the doctorate of

philosophy, are offering as dual degrees in part with Mokpo National Maritime University in South Korea and Antwerp Maritime Academy in Belgium.

The centers of excellence that operate within the Office of the President cater to a range of needs. The first is the Maritime Training Center, which offers all IMO Standards of Training, Certification and Watchkeeping for Seafarers. These courses are approved qualification standards for masters, officers and watch personnel on seagoing merchant ships and for engineers.

SOPHISTICATED

The second is the Festo Authorized and Certified Training (FACT) Center to be launched in the second quarter of 2018. This center comprises the most sophisticated Festo laboratories in the world, actively

Center for Digital Innovation and Advanced Manufacturing, which was launched on 15 November 2017 and forms the most sophisticated facility for 3D printing and additive manufacturing services and training in the Caribbean.

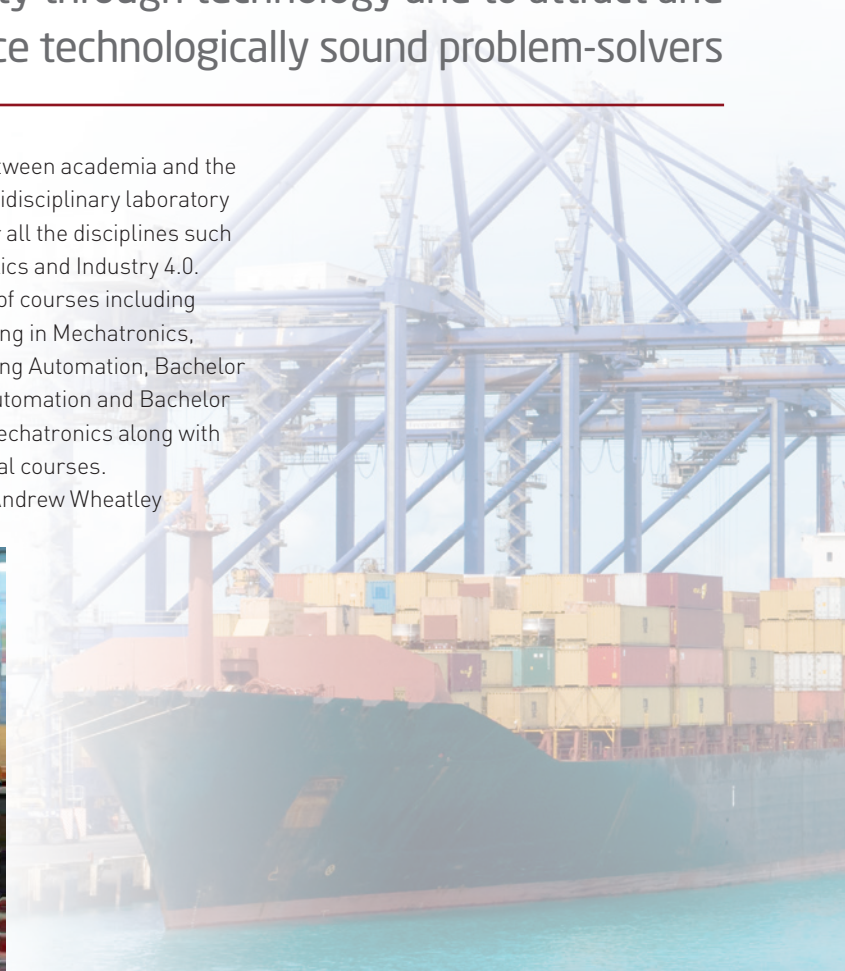
The fourth is the Center for Climate Change and Renewable Energy, which will be established in 2018.

In addition, we have launched the first drone pilot training program and customized services. These centers and new initiatives are meeting directly the needs of the region and further afield. Disruptions such as the industrial internet of things, big data and artificial intelligence will soon be featured at the CMU. We are at the cutting edge of technology. We happen to be in a developing nation; but we are competing with the First World.

There is a drive to modernize and develop the university through technology and to attract and produce technologically sound problem-solvers

bridging the gap between academia and the industry. It is a multidisciplinary laboratory that brings together all the disciplines such as robotics, hydraulics and Industry 4.0. It will offer a range of courses including Master of Engineering in Mechatronics, Master of Engineering Automation, Bachelor of Engineering in Automation and Bachelor of Engineering in Mechatronics along with multiple professional courses.

The third is the Andrew Wheatley



CARIBBEAN MARITIME UNIVERSITY HONORS CSA MEMBERS



Four members of the Caribbean Shipping Association – Grantley Stephenson, Ronald Malins-Smith, Marc Sampson and Stephen Bell – were honored by the Caribbean Maritime University at its inaugural graduation ceremony at the Jamaica Conference Centre on 14 November.



ABOVE: Roland Malins-Smith receives an honorary degree of Doctor of Science in International Shipping for his significant contribution to shipping in the region. With him are the university chancellor, His Royal Majesty Drolor Bosso Adamtey I; the Minister of Education, Youth and Information, Senator The Hon. Ruel Reid; and the university president, Prof. Fritz Pinnock.



ABOVE: Grantley Stephenson receives his citation after being awarded an honorary Doctorate in Port Management for his significant and enduring contribution to shipping in Jamaica and for his support of the nation's growth imperatives. He is joined by the chair of the University Council, Hyacinth Bennett; the chancellor, King Adamtey I; the Minister of Education, Senator Reid; and the university president, Prof. Pinnock.

GRANTLEY STEPHENSON

Dr Grantley Stephenson received an honorary degree of Doctor of Science in Port Management for his remarkable contribution to the shipping industry. He has been an influential figure in the region's shipping industry for over 40 years, 30 of which have been spent in senior management positions at some of the industry's most integral companies. Among the prominent companies he has helped lead are Kingston Wharves Limited, Jamaica Producers Group Ltd and the Shipping Association of Jamaica.

Dr Stephenson was a member of the initiating team for the Jamaica Maritime Institute, thus paving the way for today's achievement of full university status. In his current role as chief executive of KWL, he has spearheaded the modernisation and growth strategies that have made the company a key player in developing the nation's shipping industry. In 2015 he received the Manager of the Year award from the Jamaica Institute of Management.

ROLAND MALINS-SMITH

For his great contribution to the international shipping industry, Dr Roland Malins-Smith received an honorary degree of Doctor of Science in International Shipping. Born in Grenada and educated in Jamaica and the UK, Dr Malins-Smith has held senior positions across the local and international shipping industry. In 1977 he became general manager of the West Indies Shipping Corporation. In 1980 he was appointed vice-president of marketing at the Miami-based Oceanic Steamship Company.

By 1992 he was senior vice-president of marketing at Tecmarine Lines in England, which he left that year to start Seafreight Line Ltd and Seafreight Agencies Inc – a lifelong ambition. As an honorary member of the CSA he continues to contribute greatly to the association, serving as chairman of the shipowners and operators group.

MARC SAMPSON

Marc Sampson was inducted into CMU's hall of fame for his outstanding contribution to the shipping industry as well as for his direct contribution to the development of the university. Formerly president of the Barbados Shipping Association, Mr Sampson is now chairman of the ship agents and private stevedore contractors group on the CSA's general council. He has worked assiduously to keep the association, and the region at large, at the helm of innovation and development in the industry.

STEPHEN BELL

Stephen Bell, regional vice-president of Seaboard Marine Ltd, was also inducted into the university's hall of fame. He was honored for his unwavering support for and contribution to the development of the Caribbean shipping industry. Mr Bell was previously chairman of the ship agents and private stevedore contractors group on the CSA's general council.

Referring to these honors, CMU president Prof. Fritz Pinnock, said: "We are delighted at the Caribbean Maritime University to be honoring stalwarts who have been contributing consistently to the shipping industry."

Towage

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TOWAGE INTRODUCTION

IN OR OUT? It's a tug of war

There is a pressing need for harbor tugs in Caribbean ports to be sufficiently powerful and well equipped to deal with the ever-larger vessels now plying their trade across the region. But an obvious solution - contracting out - may not be that simple for many island ports. In this multi-page report, Gary Gimson looks at the benefits of outsourcing and also profiles the region's leading tug builder and designer.

It's a dilemma that faces many Caribbean port authorities: whether to run their own tug operations or to contract out harbor towage to a specialized provider.

Until now many have opted to keep this service in-house. But does it really make financial sense to do so? Perhaps not, but money is not always the issue. Hiving off a much cherished and locally controlled activity to a foreign company can bring strong opposition from politicians (on both sides of the chamber), from the workforce, from trade unions and from local media. Many port directors could therefore be forgiven for thinking, why stir up an island-wide hornets' nest just for the sake of a tugboat?

For those port authorities with sufficient funds, another reason for maintaining an in-house operation is the seemingly attractive financing packages - often coming with export credit guarantees and long repay-



For those port authorities with sufficient funds, another reason for maintaining an in-house operation is the seemingly attractive financing package

ment terms – offered by major tug builders. This provides the port authority with a gleaming new tug, a high-profile ribbon-cutting ceremony and lots of praise from politically appointed board members, who can look with pride at the national flag in the newbuild's stern.

Once the razzmatazz is gone, however, the tug has to be properly crewed, fueled and well maintained. And during regular maintenance periods the port authority is obliged to charter-in a short-term replacement, often at high cost. Some port authorities struggle to meet these maintenance costs and their tugs may start to present a safety risk as a consequence.

MERITS

There is an easy solution, of course, and that is to contract out the harbor towage, either on bareboat or time-charter basis, from one of the two specialized open-market providers: APM-owned Svitzer or

the Chilean-Dutch joint venture SAAM SMIT Towage.

For their part, as one would expect, both Svitzer and SAAM SMIT extol the merits of subcontracting, citing greater equipment flexibility, easily managed fixed-length contracts (typically five years) with fixed outgoings, their broad experience in a specialized sector, sharper-priced procurement, enviable safety records and regular maintenance. At the same time, they still offer local crewing supported by top-quality training.

There is a further hybrid-type option whereby the port authority contracts its harbor towage to a wholly owned but independently managed subsidiary, as is the case in Curaçao with KTK Tugs.

By contrast with public sector port authorities, privately held Caribbean oil and container terminals – when they have responsibility for their own towage operations – would rarely consider running their

own fleet of tugs and it's a simple decision to contract out. Perhaps it's time for port authorities to follow suit.

CONCEPT

And it seems that some mid-sized Caribbean port authorities are already coming around to the concept – most notably the Port of Authority of Jamaica (PAJ), which put its tug and pilot boat operations out to tender in April 2017. At mid December, however, no decision had been taken in regard to the successful bidder and this may, indeed, indicate that outsourcing is not always straightforward for the reasons mentioned earlier.

If the PAJ believes it is making the right choice, others may follow. But whether it will ever make sense for small island port authorities with limited funds and irregular traffic to do likewise is open to question. It would seem that an old tug can sometimes be better than a hornets' nest.

Svitzer looks to enhance leading role in Caribbean

There's no bigger name globally in harbor towage than Svitzer and the company has an equally high profile in and around the Caribbean.

In fact, Svitzer, which operates some 430 vessels worldwide, has an impressive 32 tugs, ranging in bollard pull from 35 to 80 tons, stationed in the Caribbean and is keen to further enhance its current leading market position in the region.

Business development manager Agustin Diaz, a Curaçao native, told Caribbean Maritime: "Svitzer is open to expand in every geographical area of the Caribbean where the port infrastructure is in need of assistance and where improvements are necessary to its maritime standards on safety and efficiency."

Furthermore, Svitzer believes its expertise and experience can help ports and terminals to increase berth productivity and to help shipowners reduce fuel consumption. This seems to be paying off, with Svitzer adding new Caribbean contracts in 2017 and appearing confident that further agreements are in the pipeline for 2018.

Svitzer is part of the mighty AP Moller-Maersk Group and could be expected to gain some advantage from this situation. But Mr

Diaz counters this assertion: "There are no immediate advantages with the exception of the fact that many of our employees have a history in container or port management and so they can provide a good level of know-how when we consider to enter in new harbour towage contracts," he said.

FLEXIBILITY

Svitzer has its regional base in Santo Domingo and there are benefits in the company choosing such a location. Mr Diaz said: "Having a large fleet of Svitzer tugs operational in the Dominican Republic gives Svitzer an advantage in terms of logistical flexibility – to deliver tugs for short, medium and long-term charters throughout the Caribbean at short notice."

At the same time, Svitzer has a close working relationship in the region with Houston-based Ardent, a separately managed joint venture between Svitzer and Titan Salvage specializing in salvage, wreck removal and offshore decommissioning.

www.svitzer.com



KTK'S OPEN-MARKET STRATEGY PULLS IN NEW BUSINESS

Curaçao's KTK Tugs is probably unique in the Caribbean – a port authority-owned but independently managed towage company that also operates in the wider open market.

KTK is responsible for all harbor towage, mooring launch and pilot transport operations at Curaçao's deepwater ports.

Building on its secure home-market base, however, KTK has an open-market operating philosophy that sees the company looking beyond Curaçao for opportunities.

Managing director Surlidric Rojer told Caribbean Maritime: "We have four tugs permanently assigned to our home-port operations. The remaining tugs are deployed on the international chartering market – other operators in the Caribbean and South America region with whom we have maintained good collaboration and a long-term working relationship."

KTK currently owns eight tugs, ranging in bollard pull from 10 to 70 tons, but Mr Rojer says the company is keen to increase its fleet size: "We are looking forward to adding more units to the current fleet as we are making firm steps to grow in the region," he said. "We see the whole Caribbean area, including the Dutch-speaking islands, as an interesting market to achieve our vision."

In Curaçao, KTK is more than just a basic harbor-based operation; it has a deepsea capability and offers a range of other services:

- Regular barge transportation
- Assistance for vessels lightering offshore
- Emergency response (in November, for example, KTK assisted a vessel drifting with mechanical problems north of Aruba)
- Coastal towage (regular tug/barge service between Curaçao and Bonaire)
- Crane barge assistance to ensure position-keeping as well as anchor handling during wreck removal and harbor civil works.

KTK is a good example of how a port's harbor towage services can be used commercially. It could be the template for other companies in the Caribbean with entrepreneurial flare and a sufficient base business.

ABOUT THE COMPANY

KTK Tugs was set up in 1985 and is a wholly owned subsidiary of Curaçao Ports Authority. The company employs 140 maritime professional and office staff.

www.ktktugs.com

SAAM SMIT eyes Caribbean harbor towage market

Panama-headquartered SAAM SMIT Towage has gone from strength to strength. A joint venture between Chile's SAAM and the Boskalis Group of the Netherlands, it operates a fleet of over 100 tugs of up to 80 tons bollard pull.

SAAM SMIT Towage already has operations in four locations – Panama, Mexico, Brazil and the Canadian west coast in British Columbia – and now the company is pushing hard to win a share of the Caribbean's harbor towage market. It is out to show Caribbean island port authorities how they can move away from their in-house towage operations and seriously consider



'Under our umbrella of related group companies, we operate as one company in terms of transferability of equipment'

contracting out services.

Chief commercial officer Robert Bosman outlined the current situation and explained why things might have to change: "Most smaller islands in the Caribbean have their own in-house tug operations as a legacy from the past. The requirements for tugs for shipping and cruise lines have changed significantly in the past decade. While many port authorities are still operating with older tug equipment, safety and operating costs become an issue. That is the moment when outsourcing to a specialized tug operator should be considered as an efficient and effective solution. I always say buying a tug is simple, but what happens after that? Operating and maintaining a tug through its lifetime while keeping it in class and with a well-trained

crew is not that simple and can be very expensive. In my opinion, operating tug services does not belong to the core business of a port authority.

TECHNOLOGY

Mr Bosman went on: "We see that tug requirements are getting higher as ships get bigger, while at the same time the tugs operated in several [Caribbean] locations lack power and have technology that does not comply with the requirements of today and tomorrow. At the same time, these older tugs [involve] significant operating costs for the port authorities involved due to lack of economies of scale."

SAAM SMIT Towage believes it has the regional and worldwide presence and the range of modern equipment to offer

tailor-made tug solutions to port authorities to solve this fast-approaching dilemma while the port authority still stays in control. Mr Bosman said: "We operate under our umbrella of related group companies and we operate as one company in terms of transferability of equipment. This gives us a tremendous flexibility with our global group of companies."

The company is optimistic about its ability to offer tug solutions in the region. "We are in contact with port authorities to review their needs and to find the right equipment for their ports," confirmed Mr Bosman. "Moreover, we participate in tenders in the region. And with Panama as our regional hub, we see more customers finding their way to SAAM SMIT Towage." www.saamsmit.com



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Damen builds on success in Caribbean market



Damen Shiprepair Curaçao



The Dutch ship and boat builder Damen has been selling tugs and other specialised maritime vessels to customers in the Caribbean since the 1970s and today its 'Americas Region' accounts for some 20 per cent of world-wide sales.

In fact, Damen has been so successful, over such a long period, that area manager Alan Borde told Caribbean Maritime: "We see customers that we sold to in the 1970s now returning to us for replacements."

To give a snapshot of Damen's current performance in the region, at the end of 2017 the company was in the final stages of delivering two Stan Pilot 1505 vessels for the Port Authority of Jamaica. Just before that, Damen had delivered patrol vessels and interceptors to the Trinidad & Tobago Coast Guard and a FCS 5009 fast crew boat to Trinidad's National Energy Corp as well as vessels for the Royal Bahamas Defence Force.

INNOVATION

Damen has consistently led the industry in terms of technical innovation and much of its continued success is due to this. It helps explain why the company is doing so well in the United States, where it acts mostly as a designer and systems integrator. Mr Borde

told CM: "We have 29 tugs under construction in the US, in cooperation with five different shipyards, ranging from a small line-handling tug to the most powerful ASD [azimuth stern drive] on the market at 150 tons bollard pull. All of these tugs will be operating in the US domestic market."

Damen, of course, also has its own shipbuilding and repair presence in the Caribbean as a result of its long-time involvement in the Damex yard in Cuba. "Whenever the opportunity arises we are more than willing to build at Damex," said Mr Borde. "At this time we have a few vessels being built there for clients in and around the region."

In addition, since early 2017 Damen has run the former CDM shipyard in Curaçao. "We are still in the early days of Damen Shiprepair Curaçao," said Mr Borde. "But in time we will be in a position to send all our regional clients to this yard for maintenance and other work as our services portfolio grows. In this context, it also

worth mentioning that, with expanding offshore activities in the Gulf of Mexico, and thanks to the recent Mexican energy reforms, we expect an increasing demand for offshore vessel repair, refit and conversions

such as FPSOs, accommodation vessels and offshore support vessels, for which Damen Shiprepair Curaçao can provide a tailor-made service."

CAPACITY

To upgrade the yard, Damen is currently refitting two floating dry docks in Rotterdam. These will be transported to Curaçao in the first quarter of 2018 and the yard will continue to provide capacity in line with the growing demand in the Caribbean region.

"By operating a dockyard of our own that includes two graving docks, two floating docks and sufficient quayside capacity including a designated services hub, we offer turnkey solutions in the Caribbean region," said Lodewijk Franken, managing director of Damen Shiprepair Curaçao: "In essence, we are a one-stop shop."

Email Lodewijk Franken (Lodewijk.Franken@damen.com) or Alan Borde (alan.borde@damen.com) for more information.

Damen has consistently led the industry in terms of technical innovation and much of its continued success is due to this

STAR-CROSSED VOYAGE...

HOW AGENTS COPED WITH 'SIRIUS' SAGA

Can you recall what you were doing on 9/11? There's more than one reason why Roland Malins-Smith of Seafreight Agencies has vivid memories of that fateful time - it coincided with a ship grounding that tested his skills in crisis management to the very limit. Here is his account of those stressful days.

It was the week before 9/11. The working week at Seafreight Agencies began with a desperate search for a substitute vessel for our scheduled Friday 7th sailing as the regular one had broken down. Our shipbroker, Joe Vidal, produced what appeared to be a suitable vessel that Wednesday at Jacksonville, voicing amazement that luck seemed always to be on our side when it came to finding replacement tonnage at short notice. I looked over the surveyor's emailed pictures of the 'Sirius', which seemed rather less presentable than I would have preferred, and made a mental note to visit the ship when it berthed at Port Everglades.

Fridays could be stressful at Seafreight Line. But this Friday brought a measure of satisfaction and mildly positive anticipation. The ship was in position, the bookings had been good, a disaster had been averted and the vacation was coming up. I made my way to the port that evening to meet with the master of the 'Sirius'. Capt Claus Damm was a mild-mannered German who appeared to be quietly competent. We discussed the cargo list and the itinerary. He thought he had the necessary charts for the first stage of the voyage to Kingston, requested a number of charts for subsequent ports and asked me for a cash

advance. I left him for an hour while the ship was being loaded, secured the cash and returned to spend a few minutes more with him. The charts would have to wait until he arrived at Kingston. When I left the ship that evening at around 11 pm I felt we were in good hands.

But, unknown to me, the clouds were gathering.

Our Capt Singh called on Sunday morning to give me the bad news. The 'Sirius' was aground on the north-east coast of Cuba. He had received a message from the ship at 04.00 advising him. It seemed that, in the early hours, with the vessel heading 163° SSE from Florida in the Old Bahamas Channel, a critical course change – required to enter the traffic separation pattern off the north coast of Cuba – was not made. Instead, the ship continued on its original course, making a beeline for Cuba as if in a vain attempt to cut the island in two. It was high and dry but intact.

INVESTIGATION

Someone appeared to have been asleep at the helm. Subsequent investigation would confirm that the lighthouse on Cayo Santa Maria was working, as were the two GPS units on the bridge. The watch was either playing dominoes or did not have the proper

charts. We would never know. Owners would maintain that the grounding arose from a 'nautical error', taking refuge in the NYPE charter party standard Clause 16 exception of errors in navigation.

Capt Damm took the usual initial steps to free the vessel, powering her full astern, but to no effect. Soundings of bilges, ballast and fuel tanks were taken to confirm there was no water ingress. By 04.00 local time the master had notified his owners and our port captain.

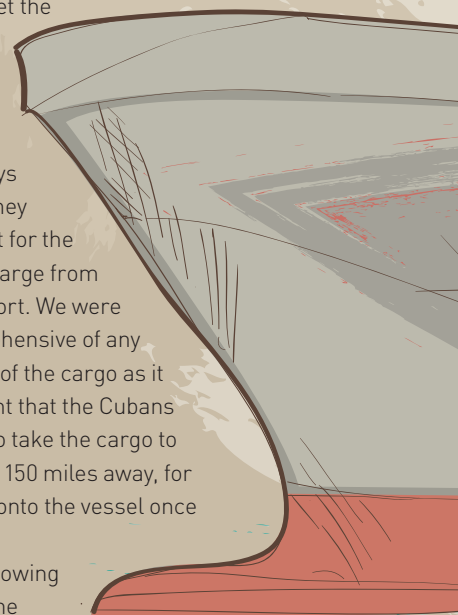
OFFERED

We would need help. But this was in Cuban waters, at a time when the relationship between Havana and Washington – and, more to the point, Havana and Miami – was particularly bad. Our friends at Crowley, who had 48 of the 386 TEUs of cargo on board, offered to assist with one of their tugs. The Crowley tug was not far away in the Bahamas, but it quickly became clear that the Cubans would not allow anyone to enter their waters. Salvage master Capt Molina and six men arrived on board by 18.00 the following day, 10 September. They would all remain on board until the vessel sailed. Antillana de Salvamento would be the salvors and a Lloyd's Open Form 2000 was duly signed by the master.

That evening, with the master, the Cubans set about calculating the requirements for refloating the ship and concluded they would need to discharge 1,600 tons of ballast and 300 to 400 tons of cargo onto a barge to get the job done.

They estimated this would take 10 days because they had to wait for the tugs and barge from a Cuban port. We were very apprehensive of any discharge of the cargo as it was evident that the Cubans intended to take the cargo to Matanzas, 150 miles away, for reloading onto the vessel once floated.

The following morning the



Cuban divers would begin an underwater survey to confirm there was no significant hull damage. Meanwhile, the German owners of the vessel requested us to urgently provide the manifests for all cargo on board "in order to investigate whether general average has to be declared or not...". The threat of a general average declaration is a depressing prospect for any liner operator.



Tuesday, 11th September found us preoccupied with the news from Germany and the coast of Cuba, concerned about resuming the voyage quickly with minimum cost to our customers and the company. A salvage contract was in place, a general average announcement was pending and we busied ourselves with our insurance brokers in Miami, underwriters in London and shipowners in Germany through our Miami shipbrokers. In an effort to open a more direct line of communication with the

Cubans, we asked our Venezuelan partner, Maritza Avilan, to fly to Havana from Caracas. Time was of the essence and good communication with the Cubans would be helpful, embargo or no embargo.

Mid-morning brought news of a plane flying into the World Trade Center. What appeared initially to be a fleeting distraction would come to dominate the news and every conversation by mid-afternoon and ultimately would change our lives in fundamental ways. But the full implications of that tragic day would not be evident immediately. The ship off the coast of Cuba was never far

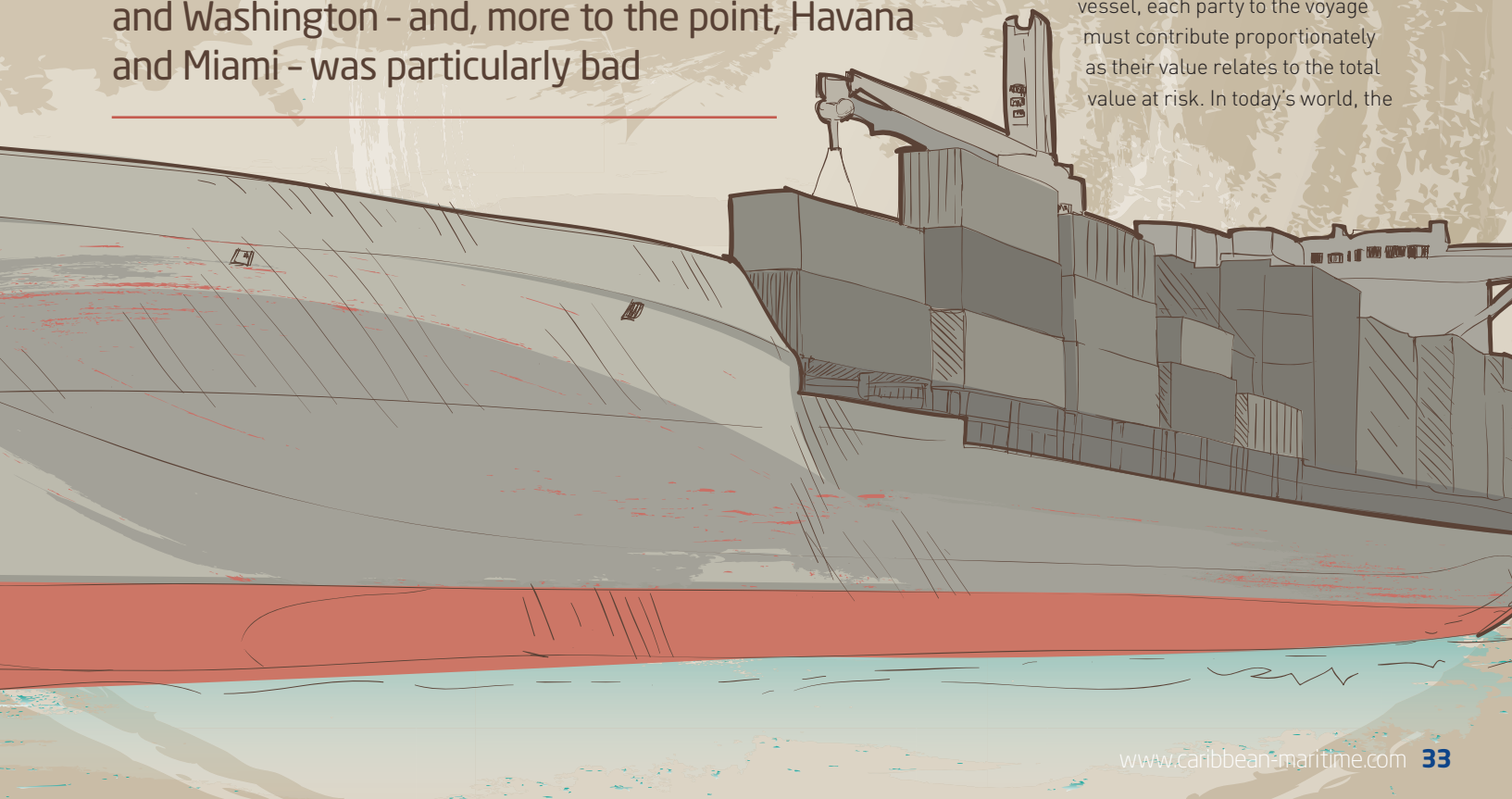
from our minds; it was a nagging worry, an embarrassment, a threat to our reputation and the confidence of our customers. In this competitive Caribbean liner trade, every misstep would be seized upon by our competitors to sow doubt and distrust of our services.

It would be three more days before the Cubans assembled two tugs and a barge at the site. By midnight on Friday 14th the tug 'Mermaid Salvor' had made fast the towing wire to the stern deck bollard of the 'Sirius' and the vessel began deballasting. At 06.00 next morning, with the arrival of high tide and with deballasting complete, the tug began its work and within an hour the vessel was refloated and taken to a safe anchorage. In the end there was no need to discharge any cargo. A week had gone by since the grounding, but the ordeal had hardly begun.

PRINCIPLE

For those of us unfamiliar with the term, general average as a maritime principle dates back to 1000 BC, having its roots in Rhodian law. A ship's voyage is regarded as a maritime adventure undertaken by the vessel's owner and the owners of the cargo, each of whom has value at risk. If a common sacrifice is made, such as an unusual expenditure to refloat a grounded vessel, each party to the voyage must contribute proportionately as their value relates to the total value at risk. In today's world, the

We would need help. But this was in Cuban waters, at a time when the relationship between Havana and Washington - and, more to the point, Havana and Miami - was particularly bad



CRISIS MANAGEMENT

value at risk on a time-chartered container-ship would obviously include the value of the ship, for which the owner is responsible, the value of fuel, prepaid charter hire, owned containers and freight charges for which the charterer is responsible, the value of leased containers on board belonging to various container leasing companies and the value of each cargo consignment on board and loaded into those containers.

ADJUSTER

The administration of a general average is conducted by an appointed average adjuster, who determines the total value at risk and the percentage contribution that each party should pay and seeks to secure the contributions before the cargo is released. The salvor, or party engaged to save or refloat the ship, earns a lien on the vessel and all of its contents so as to recover his salvage fee, once he is engaged under the

salvage contract. With several hundred bills of lading issued for the voyage to six ports, the impact of this general average would be far-reaching.

During that first week the Cuban salvors would appoint a legal representative in London, Richard Butler, and the German owners appointed an adjuster, Schlimme & Partner, of Hamburg, both mandated to pursue the collection of moneys from the parties to the mishap. The Cubans said the salvage would cost about US\$ 650,000 which they would seek to recover from all parties. Owners followed up on Friday 14th with a declaration of general average. To protect charterers' interest, we retained the services of Holman Fenwick Willan in London.

The United States licked its wounds during the subsequent weeks of September. The TV channels inundated us with news about the tragedy and the



air was heavy with incredulity, grief, anger and resolve. Against the background of this emotional outpouring, we found ourselves preoccupied with our immediate crisis, working long hours to advise and console restless customers with cargo delayed on board the 'Sirius' and pressing under-writers, salvors and the owner to complete

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the formalities and have the vessel moving again.

Our charterers liability underwriters and container equipment underwriters posted bonds for charterer's interest in the voyage, owners hull and machinery underwriters did the same, but neither of these underwriters concluded their formal submissions before 19 September. It also took time to notify, educate and guide the shippers and consignees. We determined that 77 per cent of the shipments were covered by open cargo insurance policies and these clients would be required to sign Lloyd's average bonds and alert their underwriters, who would in turn provide general average guarantees to Lloyd's Salvage Arbitration Branch. Uninsured cargo had to be secured by a cash deposit, initially 12 per cent, subsequently reduced to 6.5 per cent, to be collected by the destination agent and remitted to Lloyd's before release of the cargo at destination. But the Cubans were not prepared to wait until the cargo was discharged to secure their interest in the cargo. They wanted all of the security on every piece of the cargo to be in place before release of the vessel from Cuban waters.

SECURITY

Neither could we wait for all of the cargo interests to submit their security. Eleven days had already gone by. We felt strongly that we were wronged by owners and we demanded they put up bridging security on behalf of the cargo interests in order to have the vessel sail from Cuba. We quickly realized that this effort

would be fruitless and instead provided salvors' legal representatives with a letter of credit on 19 September, undertaking to secure the cargo interests. It took another six days of discussion between the banks and London lawyers involved before the wording of the security document was finally acceptable to the salvors.

The 'Sirius' was finally allowed to sail from Cuba at 14.00 on Tuesday, 25 September, fully 17 days from the date it ran aground. We felt strongly that someone needed to pay for this debacle, this damage to our reputation, and we arranged for a surveyor to meet the vessel at Kingston, her first call from Cuba. Errors in navigation were not actionable under the terms of the charter party, but negligence could be

an issue; absence of relevant charts would call into question the seaworthiness of the vessel. The owners were aware of the risk, however, and anticipated us.

On the morning of 27 September the 'Sirius' berthed at Kingston, some 18 days late on her scheduled arrival. Our appointed surveyor, Ralph Sugden, met the vessel upon arrival. Boarding the vessel with him was Capt John Reid of the London firm

Upon return, our surveyor was never given an opportunity to question the master or review the vessel's logs and other documents. Owners had successfully prevented us from bringing a case against them for negligence



Clyde & Co, representatives of the owner's P&I Club. Capt Reid asked our surveyor to return in three hours, insisting he must interview the master first. Upon return, our surveyor was never given an opportunity to question the master or review the vessel's logs and other documents. The P&I representative provided him with whatever information he was able to gather that day. Owners had successfully prevented us from bringing a case against them for negligence by denying us access to the master and the ship's records.

Five years later, on 13 October 2013, while on a Mediterranean cruise, my wife Loretta and I arrived in Barcelona for the day on board the 'Costa Fortuna'. I went up to the 14th deck that morning for breakfast and, surveying the harbor, laid eyes on the 'Sirius' berthed a few hundred feet away. A flood of unpleasant memories followed. A fresh coat of paint made her look rather more presentable – scrubbed, it seemed, of a humiliating episode.



PORT BRIEFING

2

USA

DEEPER DRAFT ACCESS TO PORT CANAVERAL

Port Canaveral has completed the US\$ 7.5 million deepening of its West Turning Basin, which now allows deeper draft access to the port's GT USA container terminal at North Cargo Berth 5 and 6.

The six-month project involved deepening the West Turning Basin to the authorized depth of 43 ft, plus an additional 2 ft overdredge, to complement the existing authorized port channel depth of 44 ft. The channel is clear from overhead obstructions such as bridges and wires and has no air draft restrictions. With the channel to the West Turning Basin and some 2,000 ft of quay now at 43 ft depth, Port Canaveral has one of the deepest-draft working cargo berths with no air draft limitation between Miami and Norfolk, Virginia.

Dredging was carried out by the California-based Dutra Group. All work was performed under specific conditions of environmental permits issued by the US Environmental Protection Agency, the US Army Corps of Engineers and the Florida Department of Environmental Protection.

With the West Turning Basin project complete, Port Canaveral is now looking to purchase a new mobile harbor crane with a reach of 18/19 containers. The crane is expected to be fully operational by the end of 2018.



PORT CANAVERAL

1

CAYMAN ISLANDS CONTROVERSIAL CRUISE BERTH'S NEW SCHEDULE

The Cayman Islands government has announced a new timetable for its plans to build a controversial cruise berth in George Town that will obviate the present need for tenders to ferry passengers to and from vessels.

Under a revised schedule, it now seems that it will be March 2018 before those successfully prequalified will be able to bid for the project. Completed bids will be submitted by May with formal contract evaluation in June. Bids would then go to the Cayman Islands' Central Tenders Committee and the winning bid is expected to be announced in August. Pre-construction could then commence before year-end, although the work itself could take up to four years. This timetable is not set in stone, however, and a number of issues need resolving first.

The project is controversial on a number of fronts: its environmental impact, its high cost and the non-involvement of the Port Authority of the Cayman Islands in the pre-qualification and planning process.

In particular, environmental issues remain, with questions needing to be answered in regard to its impact on the marine eco-system and especially the relocation of displaced coral. Then there is the cost of the project, which is put at anywhere between US\$ 100 and 300 million, which the government expects to finance through passenger head taxes.

At the same, politicians are divided on the project and the government is still in discussion with cruise operators about the strength of their commitment to the project. The government says nothing will be built speculatively and without industry support. Meanwhile, the opposition in parliament is asking why the port authority has not been consulted about the scheme.

3

USA

MIAMI CRUISE CALLS AT RECORD LEVELS

PortMiami welcomed more than 5.3 million passengers in fiscal 2016-2017 which ended 30 September – another new record for the world’s busiest cruise port.

Early indications suggest that 2017-18 will see another new high as more cruise berths and terminals are under construction to accommodate the additional ships calling PortMiami.

In 2017 Royal Caribbean International and Miami-Dade County broke ground on the operator’s new US\$ 200 million Cruise Terminal A. Opening is scheduled for late 2018. Meanwhile, PortMiami’s Cruise Terminal F reopened in late 2017 following a program of renovation and expansion.

There are new ships and new operators, too. PortMiami has added Viking Ocean Cruises with the arrival in November of the ‘Viking Sky’ and ‘Viking Sun’. In the course of 2018 the port is looking to welcome Carnival Cruise Lines’ ‘Carnival Horizon’ and ‘Carnival Magic’; Norwegian Cruise Line’s ‘Norwegian Bliss’; and Royal Caribbean International’s ‘Allure of the Seas’, ‘Mariner of the Seas’ and ‘Symphony of the Seas’.

Further ahead, the MSC Cruises vessel ‘MSC Meraviglia’ will join the Miami fleet in 2019 and Virgin Voyages is set to commence calls from spring 2020.

PORT MIAMI



4

BARBADOS

RECORD ARRIVALS OF CRUISE PASSENGERS

Barbados Port Inc. set a new record of over 800,000 cruise passenger arrivals in 2017. This was complemented by an almost record number of inaugural calls from cruise ships as Barbados cemented its position as one of the southern Caribbean’s most popular cruise destinations.



PORT OF BRIDGETOWN, BARBADOS

CRUISE NEWS

CANAL RECEIVES FIRST TRANSIT OF SEASON

On 7 November the 'Caribbean Princess' became the first cruise ship of the 2017/2018 cruise season to transit the expanded Panama Canal.

The vessel, operated by Princess Cruises, did a turnaround transit through Agua Clara Locks on the Atlantic side. With 3,086 passengers on board, the 'Caribbean Princess' began its roundtrip 10-night itinerary from Fort Lauderdale passing through the Bahamas, Cartagena, Cristobal, Limon and the Cayman Islands.

The 112,894 gross ton Caribbean Princess was built at Italian Fincantieri Monfalcone shipyard in 2004 and has a maximum capacity of 3,600 passengers.

The Panama Canal expects to receive 236 cruise ships through its panamax and neopanamax locks during the 2017-2018 cruise season, which officially began on 2 October.

In April 2017 Disney Cruise Line's 'Disney Wonder' became the first cruise ship to transit the expanded canal.

This season, the ship will traverse the waterway again along with the 'Caribbean Princess', 'Carnival Freedom', 'Carnival Splendor' and 'Norwegian Bliss'. Together, the five ships will make a total of 20 transits, and 11 new cruise ships will transit either the canal's panamax or neopanamax locks for the first time. These vessels are from the following lines: Princess Cruise, Norwegian Cruise, Carnival Cruises, Silversea Cruises, Viking Ocean Cruises, Lindblad Special Expedition and CMA CGM.

ROYAL CARIBBEAN CRUISE SHIP: 'NAVIGATOR OF THE SEAS'



NAN28/Shutterstock.com

RCCL WEATHERS HURRICANES OK

While the hurricanes had a negative impact on its overall revenue, Miami-based Royal Caribbean Cruises said it ended the third quarter of 2017 with record earnings.

The company's net income for the three months ended 30 September reached US\$ 752.8 million, up from a net income of US\$ 693.3 million in the same period a year earlier. Its revenues for the quarter, at US\$ 2.56 billion, were at a similar level to last year's due mainly to the impact of an active hurricane season.

Financially, the storms were 'unusually impactful' because of when and where they hit and the net effect was a cost to the company in excess of US\$ 55 million, according to Royal Caribbean. Most of this impact was from lost revenue, but there were also direct costs associated with the storms and with the company's humanitarian efforts.

In addition, there were significant timing shifts across a wide range of activities as expenses were shifted between quarters to adjust to the storms. The company added that it still expects to generate earnings for the year within the increased range of guidance provided prior to the storms.



Image © Princess Cruises

PRINCESS CRUISES SHIP: 'CARIBBEAN PRINCESS'

1

ACMF HONORS TWO PROMINENT JAMAICANS

The American Caribbean Maritime Foundation (ACMF) celebrated its inaugural awards program in New York in November with almost 100 invitation-only guests present to see the foundation honor two prominent Jamaicans – Michael Henry and Grantley Stephenson.

Mike Henry, who is Jamaica’s Minister of Transport & Mining, received the ACMF Leadership Award, while Dr Stephenson, the Immediate Past President of the CSA, was presented with the foundation’s Anchor Award.

James Luce, ACMF board member and president of the James Luce Foundation, and Dr Brown Metzger used the occasion to announce a US\$ 150,000 gift towards the building of a lecture theatre at the Caribbean Maritime University. The donation was from Roland Malins-Smith (also a contributor to this magazine), founder and former chief executive of Seafreight Agencies, which was acquired by Crowley Shipping in 2015. Additional funds were raised as guests presented checks and signed pledges that were generously matched by Jim Luce.

The ACMF is a 501 (c) (3) tax-exempt organization under the United States Internal Revenue Service non-profit law. Visit the ACMF website at www.acmfdn.org for more information.

Michael Henry (centre) and James Luce (right) pictured with ACMF Founder and President Dr Genevieve Brown Metzger



Image: Mangala Weerasekera



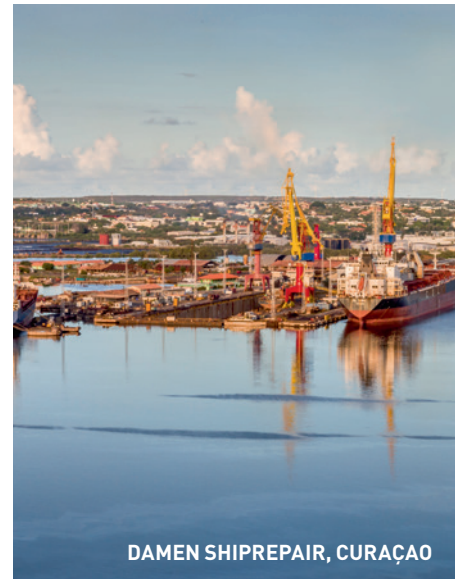
2

MICHAEL SILVERA DIES

The sad death of has been announced of Michael Silvera, a former member of the managing committee of the Shipping Association of Jamaica.

Mr Silvera served in the shipping industry for over 30 years. Starting work at Port Services Ltd in the 1960s, he later became general manager at Terminal Services Ltd.

He left the maritime sector in 1998 after the closure of Terminal Services and subsequently set up his own paving business.



DAMEN SHIPREPAIR, CURAÇAO

3

CURAÇAO REPAIR YARD CERTIFIED BY LRQA

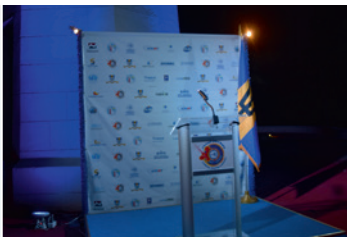
The facilities of Damen Shiprepair Curaçao (pictured above) gained ISO 9001:2015 and ISO 14001:2015 certification from Lloyd’s Register Quality Assurance in November. The Netherlands-based Damen Shipyards Group took over the long-term management of the former Curaçao Droogdok Maatschappij (CDM) in February 2017. The Damen group operates 33 ship-building and repair yards employing 9,000 people worldwide. In addition to Curaçao, the group’s Damen Shiprepair Amsterdam received certifications from LRQA along with a sister company, Niron Staal Amsterdam.

Caribbean Shipping Association's 47th Annual General Meeting

Bridgetown, Barbados
9-11 October 2017



OPENING RECEPTION >>



SILVER CLUB DINNER >>



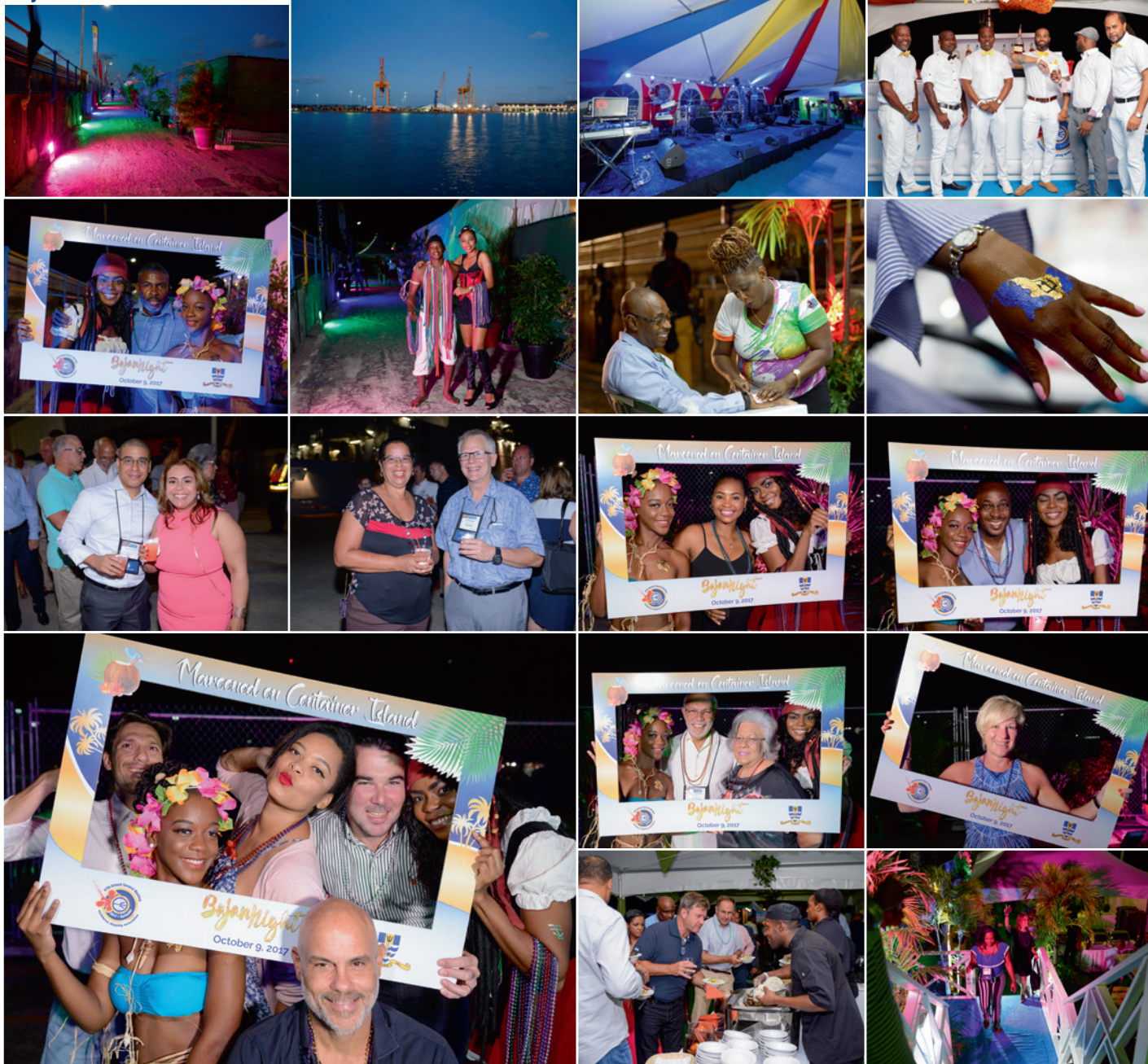
AGM DAY ONE >>



AGM DAY TWO >>



BAJAN NIGHT >>



CSA GALA NIGHT >>



RATES START TO FIRM DESPITE HURRICANE IMPACT

Container charter market report for the Americas / Caribbean region, September to November 2017

Three hurricanes have left devastation across the Caribbean and United States mainland with thousands having lost their lives and thousands having lost their homes and belongings. Some islands found their main income, tourism, basically wiped out. The long-term effects of this devastation are yet to be determined.

Despite the tragic events, the timecharter rates have started to firm moderately across the board – the seasonal autumn rate improvement – and the rising activities in the Atlantic as such have been dragging the rates of the Caribbean tonnage. Supply and demand was balanced with a handful of ships positioning into the Caribbean, replacing those that had left the area at the end of the summer for drydocking or better prospects elsewhere.



SUB 1,000 TEU

Ships under 1,000 TEU have been able to maintain and increase their levels on short and medium periods, some on the back of demand for recovery after the hurricanes. Geared vessels of 700 TEU improved from low-6,000 in August to mid-7,000 in November. Geared ships of 966 TEU kept their levels of about mid-7,000. In November, one geared ship of 862 TEU fixed reeferized trade in the Caribbean, positioning from Asia, where levels are dramatically lower. But also gearless tonnage remained in demand, provided the vessels were able to load 45 ft containers.

SELECTED FIXTURES FOR TONNAGE UP TO 1000 TEU GEARED OR GEARLESS					
Sep 17	Sandwig	2-3 months	US\$ 7,350	p/d	
	657 TEU / 390@14 / 17.5on27 / 116rp				
Sep 17	Katharina B	4-6 months	US\$ 5,100	p/d	
	520 TEU / 280@14 / 15on15 / 75rp				
Oct 17	Delphinus	2-5 months	US\$ 5,700	p/d	
	603 TEU / 350@14 / 16on23 / 150rp				
Oct 17	Lena	2-5 months	US\$ 7,650	p/d	
	966 TEU / 604@14 / 18on35 / 252rp				
Oct 17	Paradero	11-13 months	US\$ 7,800	p/d	
	974 TEU / 586@14 / 17on34.5 / 170rp 45' x 102" dedicated trade !				
Nov 17	Vega Scorpio	2 months	US\$ 7,550	p/d	
	966 TEU / 604@14 / 17.4on44 / 252rp				
Nov 17	Birk	6 months	US\$ 7,600	p/d	
	657 TEU / 390@14 / 17.5on26.8 / 116rp				
Nov 17	Bf Leticia (positioning from Asia to Caribs)	12 months	US\$ 7,600	p/d	
	862 TEU / 595@14 / 18on33.3 / 204rp reefer container trade !				

1,100 TEU

A more moderate development was noted for the standard CV 1,100 geared. Early September, a spot CV 1,100 positioned to the Caribbean against a 12-month charter at soft US\$ 6,900 which, however, was still better than staying unemployed in the Med. October and November restored the rates for CV 1,100 open and trading in the Caribbean to levels of US\$ 7,750 respectively US\$ 7,950. Higher-spec features and lower consumption gave a Sedef 1,100 an advantage of US\$ 1,000 per day compared with a CV 1,100.

SELECTED FIXTURES FOR TONNAGE 1100 TEU GEARED, CELLED					
Aug 17	Cap Taputapu	6-8 months	US\$ 9,750	p/d	
	1,102 TEU / 705@14 / 18on24.5 / 220rp USWC - South Pacific				
Sep 17	Bc Singapore	12 months	US\$ 6,900	p/d	
	1,118 TEU / 700@14 / 17on38.5 / 220rp				
Oct 17	Asian Sun	5-7 months	US\$ 7,750	p/d	
	1,118 TEU / 700@14 / 19.5on36 / 220rp				
Oct 17	Asiatic Wind	4-5 months	US\$ 8,750	p/d	
	1,110 TEU / 717@14 / 18on32 / 232rp (4 HC under deck)				
Nov 17	Asian Trader	12 months	US\$ 7,950	p/d	
	1,118 TEU / 700@14 / 19.6on41.8 / 220rp				

1,300 TEU

Ships of 1,300 TEU remained stable at mid to high 8,000s except when the ships are expected to enter the reefer container trade. The seasonal melon trade from Central America to USA absorbed



2,500 TEU

In the Caribbean, the 2,500 TEU type seems to turn into an all-purpose workhorse, be it for feeding, short and medium liner service or high reefer trades. There is clearly a two-tier market, with high reefer tonnage being evaluated roughly US\$ 750 to US\$ 1,000 per day higher. Especially the new breed of super eco (19 knots on 48 tons IFO) and high reefer intake 2,400/2,500 TEU ships have been able to obtain a premium for their features when standard 2,500s remained stable.

two CV 1,300 vessels at about US\$ 1,500 per day above standard container trades, taking into account the higher technical requirements for such trades.

SELECTED FIXTURES FOR TONNAGE 1300 TEU GEARED, CELLED

Sep 17	Varamo	12 months	US\$ 8,500	p/d
	1,296 TEU / 957@14 / 19.6on47 / 390rp			
Oct 17	Paul Russ	69-114 days	US\$ 8950	p/d
	1338 TEU / 925@14 / 19on49 / 449rp			
Nov 17	AS Felicia & sister	3 to 7 months	US\$ 10500	p/d
	1296 TEU / 957@14 / 19.6on45 / 390rp <i>reefer container trade</i>			
Nov 17	Alioth	4-6 months	US\$ 9000	p/d
	1341 TEU / 913@14 / 20on52 / 449rp			

1,700 TEU

While September was rather quiet for this class of containership, October and November rates have been a little firmer and remained stable.

TONNAGE 1700 TEU GEARED, CELLED

Sep 17	Hansa Freyburg	1 month	US\$ 8,150	p/d
	1,740 TEU / 1330@14 / 21on64 / 300rp			
Oct 17	Gluecksburg	11-13 months	US\$ 9,000	p/d
	1,688 TEU / 1287@14 / 20.5on60 / 345rp			
Nov 17	Hansa Ludwigsburg	9-12 months	US\$ 9,000	p/d
	1,732 TEU / 1275@14 / 21on64 / 300rp			

SELECTED FIXTURES 2000 TEU AND LARGER

Aug 17	Marivia	24 months	US\$ 7700	p/d
	2082 TEU / 1640@14 / 20on69 / 432rp			
Sep 17	Wuhan Trader	5-7 months	US\$ 9250	p/d
	2564 TEU / 1852@14 / 22on84 / 342rp			
Sep 17	Antwerp Trader	4-6 months	US\$ 9750	p/d
	2490 TEU / 1868@14 / 19on74 / 566rp <i>reefer container trade</i>			
Oct 17	Cape Martin	4-6 months	US\$ 9500	p/d
	2800 TEU / 2260@14 / 20on93.5 / 506rp			
Nov 17	Tiger	6-9 months	US\$ 10000	p/d
	2524 TEU / 1854@14 / 22.6kn / 550rp			
Nov 17	Nordamelia	6-10 months	US\$ 12500	p/d
	2506 TEU / 1984@14 / 19on48 / 564rp			
Nov 17	Minerva	6-9 months	US\$ 12500	p/d
	2339 TEU / 1780@14 / 19on48 / 500rp			
Nov 17	Blackpool Tower	6-8 months	US\$ 9250	p/d
	2564 TEU / 1807@14 / 21on74 / 342rp			

CONTEX

Contex (assessing the markets irrespective of trading area) moderately softened due to lower rates in the 3,500 and 4,250 TEU classes.

	CONTEX	12 MONTHS, 1,100 TEU	12 MONTHS, 1,700 TEU	24 MONTHS, 2,500 TEU
Sep-17	398	6,605	7,881	9,673
Oct-17	401	6,723	8,237	9,844
Nov-17	400	6,713	8,561	9,778

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SALE AND PURCHASE

Largely with the influence of Norwegian financiers since September, well over 100 transactions have taken place across all sizes from 500 to 9,000 TEU and the demand continues strongly. Various fleet sales have taken place that will give the container market a complete new order. Investors as well as liner companies across the spectrum – in expectation of prices going up – have taken and continue to take advantage of low prices. Newbuilding orders remain low and if newbuildings are ordered these are mainly ultra large container vessels.

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Coming together today for the sake of tomorrow

Confluence is the coming or flowing together, meeting, or gathering at one point. Ideas-wise, it's when two seemingly different ideas combine to create a bigger idea with greater value.

In our last article, mention was made of the Transmission Control Protocol and how it enabled the proliferation of the internet. That's just half the story. The other factor was the consumers who embraced the advances and advantages of the internet.

Businesses, especially larger companies, have always been slower to adapt to new technology, preferring a wait-and-see approach. The shipping industry is no different, being considered one of the most resistant when it comes to the adaptation of new technology.

In a recently published study, 'Competitive Gain in the Ocean Supply Chain: Innovation That's Driving Maritime

Operational Transformation', it was stated that "some 85 per cent of shippers and consignees rate the industry as either slow to change (70 per cent) or far behind the curve (15 per cent) when it comes to innovation and next-generation technology adoption".

The advancement in data technology and the need for data-sharing have created a confluence – a perfect storm of sorts – for change.

Advancements in shipping tend to be driven by the large shipping lines, who force changes onto the other industry players. A case in point is the creation of post panamax carriers – large cargo vessels that have



Now is the time for ports to take a stronger grip on their future. It's time for the port operators to be first movers and make a technological adoption that directly benefits them and their future.

been built in accordance with the size of the upgraded Panama Canal. In response, ports around the world have been increasing berth sizes to accommodate these large carriers, with an expectation of increased revenue in the future. While carriers have essentially been pushing the port operators to make significant infrastructural changes, the ports risk insignificant pay-off from these investments as there is also a simultaneous move by shipping lines to consolidate through acquisition and mergers. The result may be fewer calls at these ports, not more.

As reported by World Maritime News in its article 'UNCTAD: Consolidation in Container Shipping May Lead to Oligopoly*', this may lead to an oligopolistic industry. Merged shipping lines may reduce or remove excess capacity acquired in mergers and limit supply in order to raise

demand and thus prices. Ports may expand only to have the same container throughput as before, just bigger carriers. Instead of having changes forced on them – changes that may not be beneficial – ports need to take charge of their changes.

EFFICIENCY

Now is the time for ports to take a stronger grip on their future. It's time for the port operators to be first movers and make a technological adoption that directly benefits them and their future. Currently, the most significant step that can be made is the sharing of data to increase efficiency within the ports and within the region. To quote Ron Widdows, chairman of the World Shipping Council: "The biggest lift [to the shipping industry] will come when you start providing information that improves



planning and execution in terms of onward conveyance.”

This sharing benefit has been recognized with plans to create port computer systems in countries such as Jamaica. However, these initiatives are local. We need to extend this process to being a regional one. You might ask how can you jump to regional integration when the local has not been completely successfully rolled out? By use of a framework. Make use of a development framework that allows any port to plug in at any time. The same framework that’s used regionally is used locally. This way, not every port has to join the regional integration at the same time, but they are assured that their participation will be welcomed in the future. This may even hasten local development, using the said adopted framework as a model.

Let’s dissect the current tools available for this data sharing and integration.

DATA SHARING THROUGH EDI

All ports speak a common language. Electronic data interchange (EDI) allows for quick, reliable and accurate exchange of data between stakeholders, including ports, carriers, agents, customs, custom brokers and other related parties. The use of EDI has become necessary because of the differences system-wise between related parties in the shipping industry. Essentially, whether a company uses UN/EDIFACT, GS1 EDI, ANSI or any other format for data management, EDI allows for universal interoperability by all related systems.

DATA CENTERS

Several data centers exist across the region that are comparable to those in developed countries. Currently, countries such as

Jamaica and Curaçao possess these types of centers. Regional data sites give regional partners reliable, secure data centers that can be used for regional integration.

This shows that, even currently, the technology and infrastructure exists in the region to create a regional database system to share shipping information among the Caribbean stakeholders. What is required is the willingness of the various port operators to share this information.

FUTURE OPTION: INTEGRATION THROUGH BLOCKCHAIN

Blockchain technology is currently the sexiest term among technology aficionados. Not just because of the unit value of the bitcoins, which is derived from blockchain, but more for what the technology can support and enable. Blockchain is essentially record-keeping, done in a public digital ledger. Each point in the system, in this case the port, carrier or agent, has a copy of the same ledger (distributed ledger) and records are added to each ledger based on a majority vote. How is the record accepted? The new data has to be encrypted, known as hashing, to an alphanumeric value known as a hash. A hash has to be valid to be added to the blockchain. For a hash to be valid, a formula must be solved. The solution is shared by the point that solves it first and if more than 50 per cent of the participants agree/vote that the solution is correct, then the data can be added to the blockchain and accepted by all participants. The vote is consensus on what data is accepted as factual in the system. The fact that what is considered valid data must be voted on by the majority of points in the system means that no one person/point can control what is considered valid or true in the system. This

essentially protects the validity of the data in the system and the system is thus deemed immutable.

Let us assume we have integrated RPB (regional port blockchain). Newport West in Jamaica receives information from a carrier which gets added to RPB. Now Port of Trinidad and Tobago automatically gets that same information, as long as a majority of the points in the system accept that the data is correct and vote to accept it. Port of Trinidad and Tobago can now see any parcel that is being transhipped through Jamaica with a final destination of Trinidad and Tobago. Preparations can now be made to offload when the shipment is sent on from Jamaica. As Ron Widdow stated, we improve planning and execution in terms of onward conveyance. A regional blockchain would enable this. Of the three options presented, blockchain is the best for several reasons:

- No middle man is required since all points/agents have the same record
- Provides redundancy – in case of disasters, records are distributed
- Blockchain is new technology. By adopting it, we allow the platform to be sustained for years to come.

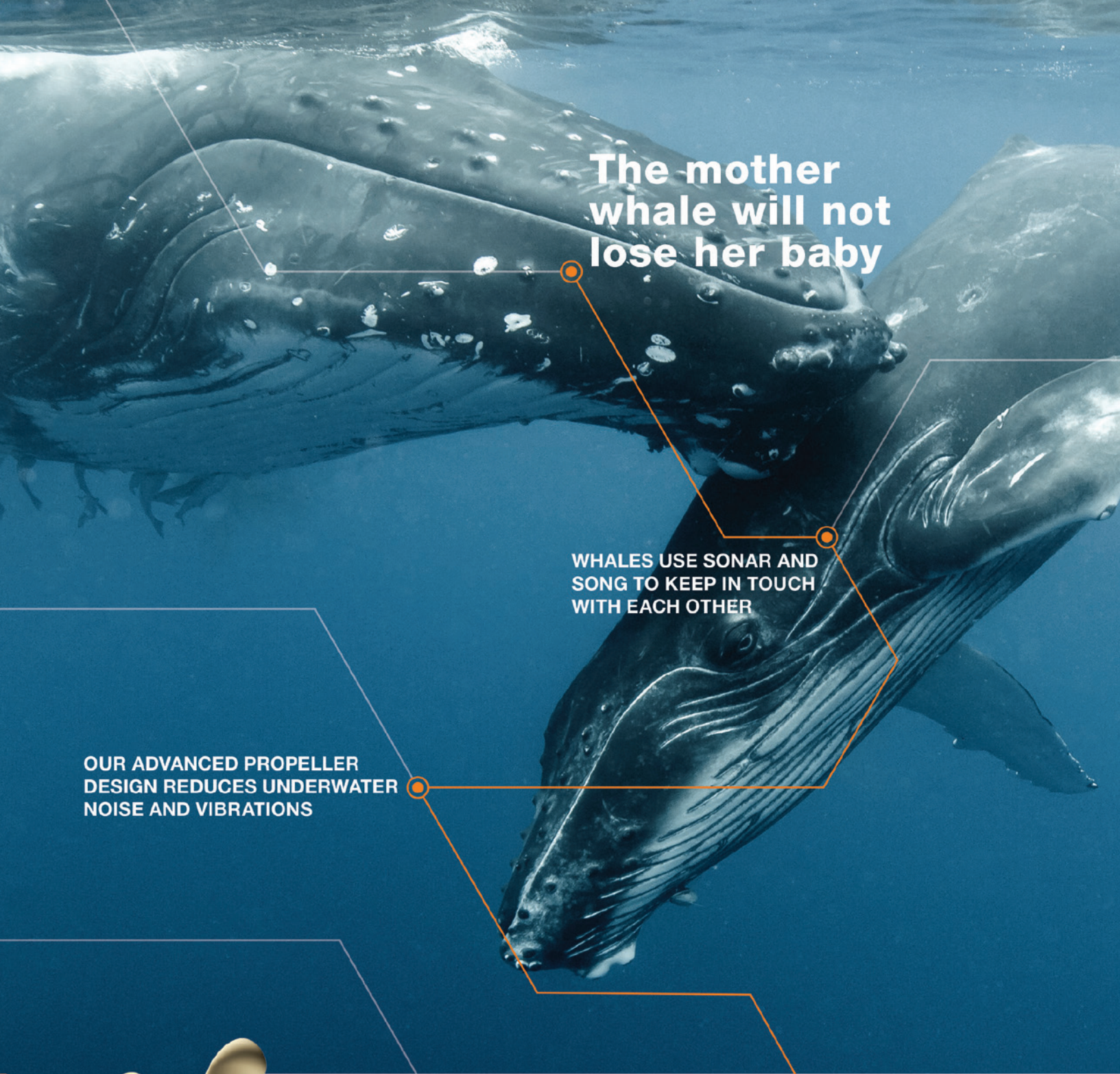
Time is the greatest asset in the shipping industry. Any process that lessens the time taken to move goods and services across the region is significantly valuable. The idea of data integration may just be a conversation for now; but it’s a conversation worth having.

Then we act.

***Oligopoly: a few controlling all in a large industry**

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