Celtic ~~Tiger~~ Cub Economic indicators

- 50% made in Ireland
- Allowed massive property boom
- Allowed massive property bust
- Exposed Banking sector to both horrors
- Funded huge infrastructure development via cyclical taxes
- Resulting in National accounts in red
- Competitiveness on the floor
- Social consequences of high unemployment

Economic indicators 2009-2010- The Economist

- GDP- US 2010 forecast +2.5%.
- EU average – 2010 forecast - +1.2%
- China – 2010 forecast - +8.6%
- Australia 2010 +2.5%
- India 2010 +6.3%
- Indonesia 2010 + 4.5%
- Russia 2010+2.5%
- Brazil 2010 +3.8%

Effects of the Economic crisis

Far East-Europe Oct. 08- Mar.09 ITMMA Report.

- Total number of weekly services North Europe/Med –30%
- Total ships deployed –26% , 549 - 406
- Average vessel size +12% , 6517-7310 TEU
- Total capacity TEU – 17% - 3.58m - 2.97m
- Average weekly capacity TEU –21%,- 405,981 – 319,301
- Average weekly capacity TEU Q.1. 09 V Q.4. 08 –15%% 397,350-335,793

Dublin Port Company-2008 throughput figures

- Ro-Ro 16.4 m tonnes
- Lo-Lo 6.5 m tonnes
- Bulk Liquid 4 m tonnes
- Break Bulk 160,000 tonnes
- Total 29.54 m tonnes
- 82 Cruise line calls
- 1.266 m passengers
- 370,000 cars – tourist/trade 2:1 ratio

Dublin Port Company

- 300 Years in operation, at the mouth of the river Liffey, at the heart of Dublin city
- Dublin Port and Docks Board (Port Authority until 1997)
- Incorporated as a State - owned private limited commercial company in 1997
- Task: provide alone or with others services etc.
- 500 staff in 1998, 155 employees in 2008
- 30 million tons 2008 in all 5 modes
- 70m Euro turnover- operating profit 40%

Dublin Port Company

- Ro-Ro accounts for 55% of Dublin throughput – almost 800, 000 units in 2008
- Ireland’s leading R0-Ro port 7 ferry companies, 17 sailings per day
- 5 terminals 8 ferry ramps, 3 two-tier.
- 50 million Euro investment over the past 3 years
- Two of the worlds largest ferries provide for 8kms of trucks into Dublin each morning

PORT COMPANIES

- Facilitators
- Movement of goods and people
- Characterised by
  - Relatively low revenues
  - Relativly high investment requirement
  - Relatively high margins
- If can’t make money facilitating billions of € then shouldn’t be in the game

THREATS

- Favouring of Landlord model
- Concession granting criteria imposition
- Consequent loss of traditional revenue streams
- Rising concentration of power in fewer concerns 5 companies controlling most container movements
- Hostility – Public – regulators
- Ever larger ships

PORTS-THE CHALLENGES-1

- Policy confusion, disinterest and dissconect
- Variety of port models- 600 EU ports
- Public hostility – urban creep planning
- Environmental threats air/water/noise/ nuisance
- Global warming- carbon taxes on the horizon
- Sustainability
- Technological catch- up comparison with aviation
- Human resource development training challenges, recruitment and retention problems
- Lack of research and development culture in ports

Challenges 2

- Supply chain disconnect – road /rail/sea/air all separate
- Lack of joined -up public thinking, e.g. transport connectivity/silo policy making.
- Human resource recruitment and retention problems- poor perception of port employment
- Training and development suitability and accessibility of courses
- Industrial relations disconnect- traditional agreement based approach v industry/business needs approach

Challenges 3

- Increasing ship size –Panama Canal upgrade and knock- on increase in ship size-including feeder vessels
- Port space constraints
- Navigation challenges, pilotage and towage difficulties-chart accuracy
- Port community ICT link -up.
- Fluctuation in Economies
- Safety regulation-EMSA / IMO relationship
- Plethora of port performance measurements across EU

Major threats to complex liner service networks

- Schedule unreliability
- Suez costs vs Cape route
- Delays in port access, pilotage, towage, locks
- Port terminal congestion
- Security.
- Terminal performance
- Port performance, cost
- Public bodies performmance,customs,local authorities, immigration, port state control etc.

So what?

- What can we do?

Innovation and competitivenes, research, technology and port performance

- Navigation efficiency and safety through on board nav aids and port ECDIS development.
- Better environmental controls through development of ICT black box technology
- Greater port operational cohesion through development of port process simulation tools and appropriate ICT based port community networks
- Better energy and co_2 performance through energy management tools
- Port planning and layout simulation tools

Port equipment

- Greater emphasis on environmental efficiency by devising efficiency ratings of all port equipment
- Research into the feasibility of remote pilotage- given the risk factors and impending pilot shortages
- Further development of tug/pilot/berthing intervisibility technology
- Further development of remote crane and stacking machinery

Human performance development

- Professionalisation of port employment
- Development of the port skills and competencies idea
- Development of business training and simulation tools, laboratory style.
- Blended learning distance delivered courses tailored for port use and delivered by a consortium of service providers