IMMTA-*News*

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The quarterly Newsletter of the International Multimodal Transport Association
– For Members only –

Editorial

Dear readers:

Welcome to our fourth 2006 issue of the IMMTA Newsletter.

This issue updates you on the multimodal transport questionnaire (see below), the 2006 Liner Shipping Index (page 2), and Short Sea Shipping in Spain (page 6). We also report on the 18th session of the UNCITRAL WG III on Carriage of Goods By Sea (page 4) and on UNCTAD's Commission on Enterprise, Business Facilitation and Development (page 14). Publications, proceedings and upcoming events of possible interest to IMMTA members are featured after page 14.

Comments, suggestions, and input for the next issue should best reach me prior to the end of next March.

Jan Hoffmann, Geneva, December 2006, IMMTA@JanHoffmann.info

Message from the IMMTA President

IMMTA Questionnaire on Multimodal Transport – Extension of Deadline

The 3rd IMMTA E-Newsletter published in September 2006, also included a questionnaire on multimodal transport prepared by the IMMTA Working Group. The questionnaire aimed at gathering information concerning the situation under which MT is practised and to shed light on various questions surrounding the subject. The members were invited to send their replies by the 30th November. In order to extend our enquiry a little further than the IMMTA membership, you were kindly invited to share the questionnaire with non IMMTA members interested / involved in MT. FIATA has kindly circulated the questionnaire to their national associations, for which I would like to express my sincere appreciation; I look forward to continuing our close cooperation with FIATA in this respect.

The number of replies we have received so far is not sufficiently large enough to enable us to reach a useful conclusion. For this reason we consider it necessary to extend the deadline for sending your replies until 15th January 2007. I urge all IMMTA members to take few minutes to fill in the questionnaire. We appreciate that not all of you are actively involved in providing or using MT services. One thing is, however, sure ant that is that all of you are sufficiently interested in MT to have become IMMTA members. If you are not directly involved in MT (as multimodal transport operators or shippers), and feel that you could not answer some of the technical questions, you could simply answer N/A (not applicable), but you can certainly reply the questions of less technical nature. We look forward to receiving your replies.

I also wish to take this opportunity to wish and your families a happy and prosperous 2007.

Mahin Faghfouri, President, IMMTA
President@IMMTA.org

A new international organization in the field of standardization container security

A new international organization in the field of standards for container security has been recently created. The International Container Security Organization (ICSO), a non-profit body established under the Belgian law, aims to develop and publish global standards for container security devices and related systems. This covers physical devices monitoring door openings, signal readings between container and terminal equipment, and data collection and usages. The organization is founded by General Electric (GE), GreenLine Systems, JP Morgan Chase, Mitsubishi Corp., Siemens and Unisys. These companies share the objectives of improving in-transit container security by defining world standards to help protect international trade, at the same time, by promoting their proper container security devices (CSD). As examples of such devices, General Electric has developed a CSD, CommerceGuard, that magnetically adheres to the inside of a container and registers any opening of the container door. This device is being marketed among Japanese terminal operators, ports, exporters, and shipping companies.

ICSO will develop, publish and recommend standards detailing how IT systems will store data, transfer data between authorized parties and ensure security and privacy of business data. Standards will be announced and made available via ICSO website.

Mr. Chritoph Seidelmann is nominated as a president of ICSO. According to Mr. Seidelmann, ICSO is solely focused on in-transit freight container and cargo security. « Just as standards contributed to make today's freight container transport system efficient, safe and successful, so will standards for new and emerging technologies contribute to the bsecurity of containers and goods in-transit ». ICSO will develope and recommend standards for notifying Customs, other appropriate authorities and authorized business personnel when shipments are compromised during transit, as well as standards for devices that detect and report container intrusion and other irregularities.

For further information: www.cargosystems.net

An Illustrated Guide to Container Sizes and Type Codes

A new publication – An Illustrated Guide to Container Sizes and Type Codes – is now available from ICHCA. Written by Mr. Mike Bohlman, chairman of the ISO Technical Committee TC 104, Freight Containers, the publication explains the details of the marking described in the ISO standard 6346 concerning the marking which should bear every Series I container replying to the requirements of international ISO standards.

For further information: www.ichcainternational.co.uk

Provided by Viatcheslav Chouvalov,
Geneva, Secretariat@IMMTA.org

Bangkok, November 2006

Report from the 18th session of the UNCITRAL WG III on Carriage of Goods By Sea

UNCITRAL Working Group on Transport Law, 18th Session, Vienna, 6-17 November 2006

The eighteenth session of the UNCITRAL Working Group on Transport Law (Working Group III) was held in Vienna from 6 to 17 November 2006. It continued its deliberations for the preparation of the Draft Convention on the Carriage of Goods [Wholly or Partly] [by Sea]. IMMTA was represented at the meeting by Mr. Jean-Michel Moriniere (Clyde & Co.) and Ms. Anastasiya Kozubovskaya (University of Nantes).

The agenda of the meeting included consideration of provisions dealing with transport documents and electronic records, delay, limitation of liability; rights of suit and time for suit; jurisdiction and arbitration and the important issue of conflict of conventions arising in the context of multimodal transportation. The following is a brief account of the main issues considered by the meeting:

The issue of particular importance to multimodal transport, debated by the WG, was provisions of article 27, including the relationship between the draft convention and other transport conventions . It should be recalled that article 27 establishes a limited network system of liability for localized loss or damage, giving precedence to certain provisions of a mandatory international convention applicable to the stage of transport where loss, damage or delay occurs. Thus, according to article 27, in cases of localized loss/damage a complex mixture of provisions of different international conventions may apply to multimodal transport, giving rise to much confusion and uncertainty. In cases of non-localized damage, or where no mandatory international regime applies, the maritime liability of the draft convention will apply to the entire multimodal transport no matter how short the sea leg and how long the land leg may be.

The discussion at the meeting began following a presentation by the representative of the International Road Union (IRU) highlighting serious concerns regarding the operation of the provisions of article 27 and articles 89 and 90 (which dealt with the relationship with other conventions) and the fact that they gave rise to potential for conflict between the draft convention and other transport conventions, namely the CMR 1956 which governs international carriage by road. Other delegations highlighted similar concerns in relation to air carriage under the Montreal Convention 1999. After an intensive deliberations the Working Group decided to delete articles 89 and 90, which dealt with the relationship with other conventions, and to retain only article 27. There was also considerable disagreement regarding the operation and purpose of article 27. The WG, however, decided that article 27 provided an appropriate basis to address the potential conflict of conventions, but the provision required further clarification and drafting improvements to ensure proper application of the limited network system and avoid potential conflict of conventions.

It should, however, be recalled that the focus of substantive provisions of the draft convention is on maritime transport and the problems of multimodal transport are not appropriately addressed. Despite these concerns the treatment of multimodal transport in the UNCITRAL draft convention remains highly unsatisfactory.

The monetary limitation of carrier's liability also received some attention. While a majority of delegations seemed, in principle, to favour a limit based on the Hague-Visby Rules, a final decision as to the level of limitation for carrier's liability was left to be decided at a later stage on the basis of the entire package of rights and obligations provided in the draft convention. Consideration of a provision dealing with limitation levels in cases of multimodal transport involving a sea leg was postponed until a decision is made regarding the issue of conflict of conventions.

The issue of delay, particularly liability of shipper for delay of the vessel was also subject of an extensive debate. The WG considered a number of proposals on the subject. There was a proposal from the United States delegation (document A/CN.9/WG.III/WP.69) to delete liability for all consequential damages for delay. If, however, the carrier remained liable for delay, then there should be a corresponding provision on liability on the part of the shipper, subject to monetary limitation. A document from the Swedish delegation (A/CN.9/WG.III/WP.74) outlined different possible options, namely: (1) delete all provisions dealing with delay, (2) keep only provisions on carrier's liability for delay, (3) retain all provisions for delay caused by the carrier as well as the shipper.

A number of delegations, including those from major developed nations as well as some industry representatives were of the view that the shipper should not be liable for consequential loss, such as delay of the vessel, and that any such liability should be subject to monetary cap. This was particularly important bearing in mind that a shipper's liability and obligations under the draft convention are much more extensive than under the existing international transport conventions. Furthermore, given the fact that a carrier could rely on monetary cap to limit his liability, a shipper should also be able to limit his liability, in all case, including in relation to physical damage to the ship or extensive pollution liability and not just in relation to delay of the vessel.

The WG, however, decided maintain provisions in the draft convention for pure economic loss or consequential damage caused by delay on the part of the carrier or the shipper, subject to agreement on an appropriate method for the calculation of the monetary limits of liability of the shipper for pure economic loss or consequential damages caused by delay. There will, however, be no such limitation in respect of other potential liability of the shipper under the draft convention.

Concerning the issue of transport documents, an important question for the WG was to decide whether the description of goods in a non-negotiable document should be considered conclusive evidence, as is the case with negotiable transport documents. A view supported by a number of delegations was that no distinction should be drawn between a negotiable and non-negotiable transport document in the hands of a third party who rely on the contents of the document. However after an extensive discussion, the WG decided that only documents of title, i.e. negotiable transport document and so-called "straight" bill of lading would have conclusive evidentiary effect.

The WG, having discussed the issues of rights of suit and time for suit, decided to delete the entire chapter dealing with rights of suit, subject to considering certain aspects for inclusion in the chapter dealing with carrier's liability. Regarding the time limit for suit under the draft convention, the WG adopted a 2 years time limit for all claims (both against the carrier and the shipper). There will be no possibility to suspend the limitation period, unless it had been agreed by the parties, but the party whose claim is time-barred will retain the possibility of set-off.

Concerning jurisdiction and arbitration, the WG decided to discuss at a later stage the possibility of including in the draft convention of a reservation or "opt in" clause on the subject on the basis of a draft text, to be prepared by the secretariat. An approach which will certainly not promote uniformity.

The next session of UNCITAL WG will take place in New York from 16 to 27 April 2007. It is intended to complete the second reading and to commence the third reading of the draft convention. A further session to complete the third and final reading is to be held in Vienna from 15 to 25 October 2007. All relevant documents and working papers are available from the UNCITAL website at http://www.uncitral.org/uncitral/en/commission/working_groups/3Transport.html

Report prepared on the basis of information provided by Ms. Anastasiya Kozubovskaya

Port Terminals Adapted to Short Sea Shipping - Analysis of the Spanish reality

In Europe, Short Sea Shipping (SSS) is the only means of transport which has undergone growth rates that can match the transport of goods by road during recent decades. From 1995 to 2004, the tons-kilometres transported by SSS, in the EU-25, increased by 32% as compared with 35% for transport by road.

The North Sea with 29.3% and the Mediterranean with 26.9% of the total were the main areas of development in TMCD. In tons of goods, in the North Sea, 582 million tons were moved, whilst in the Mediterranean they were more that 533 million tons.

The Spanish ports moved in 2004 more than 187 million tons of goods which represented 8.7% of the total of traffic of SSS. In the traffic through the Mediterranean, Spain represented 16.9% of the total, ranking second behind Italy. It also ranked second after France, with 13.4% share of exchanges in the Atlantic Ocean.

Given the importance of SSS for commercial exchanges in the Peninsula, the main Spanish ports are increasingly betting on it and are undertaking significant improvements in order to optimize the premises dedicated to this traffic such as the management and organization of the operations and activities associated with a SSS service. The Terminals dedicated to SSS represent the interface and link point between the means of transport by land (road and railroad) and the maritime means and therefore the good functioning of the intermodal chain door-to-door depends on its location, design, size, premises and management.

Firstly we should highlight that, with the exception of terminals dedicated to the traffic of vehicles which, the other terminals handle different kinds of traffic (platforms, vehicles, containers, etc.). As an immediate consequence the premises dedicated to SSS are obliged to adjust their infrastructures and superstructures, organization and management to the specific needs that they come up with, which often goes against their efficiency and productivity.

In consideration of the above, the main characteristics of the storage areas must be flexibility and versatility. The areas that form the esplanade must be able to be increased, reduced or their use changed quickly according to the type of traffic and the volume. Fixing areas for a specific use can in fact lead to under-utilization of the esplanade, with areas sometimes empty and insufficient areas at other times. Likewise, it is important to underline how a low occupation ratio that characterises this type of load, mostly due to the impossibility of piling it, has an influence on the design and in the organisation of spaces. The esplanades of the SSS terminals, as opposed to other kinds of traffic (containers), require large areas, which are also necessary for storage, manoeuvring and lagging. In order to avoid this inconvenience, some terminals have built vertical warehouses with more floors which allow for a better use of space available.

As to the management of these areas, the terminals do not have computer tools that allow to control the state of the yard or to verify the availability of slots or the position of platforms. They are in general quite simple and linear terminals which are far out from the level of automation and computerisation achieved at other premises dedicated to other kinds of traffic. Only in some terminals, mostly those linked to the traffic of vehicles, which move large numbers of units, has started the implementation of RFID technology.

Another aspect that has emerged during the visits has been the topic of safety. All the terminals are fenced around their perimeter and also have lighting and camera circuit operating 24 hours a days. Likewise, a surveillance service seven days a week and 24 hours a day en-

sures access to the terminal by the staff and authorised users and that there are no thefts or damage to the goods stored.

As to entrance-exit doors, most Spanish SSS terminals have one door that is used for the entry and exit of vehicles. The doors are of a conventional kind without incorporating technological elements or automated processes that make the entry and exit operations quicker. Furthermore, it should be stressed that there is no separation of the entry traffic at any of the terminals visited depending on the destination, nature or type of load unit. As in the management of the esplanade, it is also evident in this case that SSS lags behind with respect to other kinds of traffic, which are more developed and evolved, in which the entry represents a fundamental link set for the proper functioning of the whole terminal. We should also note the almost complete absence of the railroad means on the delivery and reception of the load. The SSS terminals, except of vehicles, do not have railroad branches inside them and almost all the collections and deliveries are made by truck.

Another aspect that has to be improved deals with the implementation of areas, within the terminals, intended for complementary services for users. Despite the high value given by transporters to these activities, only one terminal, Algeciras, has provided areas for this purpose. This is a very important matter, since the possibility of making the stay of transporters in the terminal more enjoyable could become in the near future a significant and mostly differentiating element when transporters have to choose between one terminal or another.

The case of added value activities connected with goods handled in the terminal is, at least, in the short term, a very different one. Currently the only premises that have this kind of areas are the vehicle terminals. In the near future, the situation does not seem likely to change. It is difficult that premises dedicated to SSS, which are so in need of space for storing the load, will provide internal areas in order to carry out this kind of activities. The presence of specific areas, close to the port venue and designed to develop these activities, as Logistics Activities Zones or Transport Centres, may make the difference, as well as the complementary areas for users, when choosing one terminal or another.

The basic port services represent another critical issue in SSS. The pilotage, despite the experience of the Master and the fact that the SSS vessels come in and out daily and regularly from the same port, is practically essential and the mooring and unmooring, which could be done by the shippers' land staff, is made by the port mooring operators, with a significant increase in costs and time of execution. Towing is for the moment the only basic service which, depending on the size of the vessel, can be dispensed. In fact, in all the terminals visited, in the SSS regular lines, it is not provided.

SSS is still developing. The ro-ro traffic has gained importance due to the European Union's need and will to rebalance the modal share of transport of goods in Europe. Providing a real alternative to the thousands of trucks that each day cross the boarders of the European countries has become a top priority of the European Transport Policy. The SSS represents, at least potentially, one of these possible alternatives. Clearly, in order to become a reality and to win traffic from the road, all the abovementioned aspects must be improved. With the passage of time and the increase of the quality requirements by the SSS users, the ports, terminals, shippers have endowed themselves with greater and better means to increase the efficiency and productivity of their activities, but still this is not enough. Land transporters will choose to board its truck in a ro-ro vessel only if the service offered is competitive vis-à-vis the land transport. Services flexibility, efficiency of the dedicated premises, accessibility to terminals, efficiency in the operations and documental simplification are the points on which work and improvements are to be made.

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Liner Shipping Connectivity Index – LSCI 2006

In UNCTAD Transport Newsletters # 27 (1st Quarter 2005) and # 29 (3rd Quarter 2005), we presented an index that provided an indicator of liner shipping connectivity for 162 countries in mid 2004 and mid 2005, respectively. In the present article, we provide an update on the different components of the index with data for July 2006. The components of the index are again generated from data obtained through Containerization International Online (www.ci-online.co.uk; accessed in July 2006). They reflect the services, vessels and their TEU[1] capacity deployed by international liner shipping companies.

1) Deployment of container ships

The "fleet deployment" is the number of ships that national and international liner shipping companies assign to the liner services from and to the country's ports.[2] A larger number of ships is an indicator that a country's shippers have more opportunities to load their containerized exports, i.e. that they are better connected to foreign markets.

Table 1 shows the ten economies with the highest number of container ships deployed on liner services from and to their ports in 2006, together with the respective data for July 2005 and July 2004. Five of the top ten countries experienced positive growth during the last year, two countries recorded practically no change, and three countries experienced a reduction in the number of ships deployed on services from and to their ports between July 2005 and July 2006.

Table 1: Fleet assignment (number of ships)

Rank 2006	Country or territory	2006	2005	2004	change 2006/2005
1	China	1,448	1,354	1,228	6.9%
2	Hong Kong, China	1,242	1,175	1,166	5.7%
3	United States	1,037	1,094	1,074	-5.2%
4	Singapore	947	930	916	1.8%
5	United Kingdom	842	825	861	2.1%
6	Germany	821	820	810	0.1%
7	Netherlands	797	797	785	0.0%
8	Belgium	777	793	774	-2.0%
9	Korea, Rep.	706	767	734	-8.0%
10	Malaysia	700	607	588	15.3%

Source: www.ci-online.co.uk, *July2006.*

Looking at changes over the last two years, globally, 81 countries received a larger number of ships in July 2006 than in July 2004, 18 countries saw no change, and the remaining 63 countries recorded a decrease in the number of vessels.

2) Deployment of container carrying capacity (TEU)

A similar picture is obtained if we look at the deployment of container carrying capacity, i.e. considering the number of slots for 20 foot equivalent units (TEU) (Table 2). As a consequence of the introduction of larger vessels, nine of the top ten countries recorded positive

[1] TEU stands for a twenty-foot equivalent unit. The number of TEU reflects the container carrying capacity of a ship and not the actual containerized trade carried.

[2] For the purposes of this article, "deployment" and "assignment" are used synonymous. Although a ship can only be deployed at one place at one point in time, if it is assigned to a given route covering several countries it will effectively be deployed to these same countries over a period of time.

growth during the last year, versus only one country (Republic of Korea) that experienced a decrease of TEU deployment.

Table 2: Fleet assignment (TEU)

Rank 2006	Country or territory	2006	2005	2004	change 2006/2005
1	China	5,068,909	4,442,070	3,928,913	14.1%
2	Hong Kong, China	4,345,864	3,936,129	3,749,697	10.4%
3	United States	3,162,767	3,014,748	2,978,193	4.9%
4	Germany	2,689,753	2,341,410	2,249,857	14.9%
5	Singapore	2,672,541	2,477,400	2,471,635	7.9%
6	United Kingdom	2,599,120	2,204,620	2,169,336	17.9%
7	Netherlands	2,411,338	2,120,237	2,083,832	13.7%
8	Taiwan, prov of China	2,264,185	2,001,254	1,959,434	13.1%
9	Korea, Rep.	2,092,781	2,215,415	2,110,367	-5.5%
10	Malaysia	2,046,129	1,737,298	1,716,361	17.8%

Globally, 100 countries saw a positive growth between July 2004 and July 2006, 2 countries experienced no change, and the remaining 60 countries saw a decline.

3) Number of liner shipping companies

This indicator is of particular interest in view of the recent mergers in the shipping industry.[3] Globally, the market share of the largest liner shipping companies has been increasing over the last years, and there have been concerns about the resulting process of concentration of market power. In fact, all top ten countries (Table 3) record a smaller number of shipping companies that provide services from and to their ports in July 2006 as compared to July 2005.

Table 3: Liner companies providing services to the country's ports

Rank 2006	Country or territory	2006	2005	2004	change 2006/2005
1	Netherlands	118	126	131	-6.3%
2	Belgium	113	119	123	-5.0%
3	United Kingdom	108	117	133	-7.7%
4	Germany	103	110	114	-6.4%
5	France	97	100	105	-3.0%
6	United States	91	101	77	-9.9%
7	Singapore	89	95	98	-6.3%
8	China	84	87	96	-3.4%
9	Spain	83	88	91	-5.7%
10	Italy	79	82	87	-3.7%

In July 2004, there were 33 countries that received services from 4 or fewer companies only. By July 2006, this number has increased to 43 countries. Most of these countries are developing countries, and many are Small Island Developing States (SIDS) for whom dependency on a small number of shipping companies may imply a danger of a monopolistic or oligopolistic market structure.

[3] See also UNCTAD Transport Newsletter #24, second quarter 2004. http://www.unctad.org/en/docs/websdtetlb20042_en.pdf

4) Liner services

Usually, shipping lines provide more than one regular service. Still, when liner companies consolidate, they may also combine and restructure their services, leading to a reduction in the number of services in a majority of countries.

Table 4: Liner services from the country's ports

Rank 2006	Country or territory	2006	2005	2004	change 2006/2005
1	China	943	957	863	-1.5%
2	Hong Kong, China	743	738	738	0.7%
3	Singapore	689	687	669	0.3%
4	United States	594	621	623	-4.3%
5	Korea, Rep.	531	567	569	-6.3%
6	Japan	496	540	539	-8.1%
7	United Kingdom	469	503	538	-6.8%
8	Germany	461	474	472	-2.7%
9	Netherlands	454	498	506	-8.8%
10	Malaysia	445	436	431	2.1%

Note: Includes some double counting if services are being sold under different names.

5) Average vessel sizes

As vessel sized of new buildings increase, so does the average vessel size. 114 countries (i.e. 70 per cent of the total) received vessels of a larger average size in 2006 than in 2004, 2 countries recorded no change, and 46 countries experienced a decrease. A large majority of the countries that are served by the smallest ships are SIDS. The countries receiving the largest ships are those located on the main East-West shipping routes (Table 5).

Table 5: Average vessel sizes

Rank 2006	Country or territory	2006	2005	2004	change 2006/2005
1	Saudi Arabia	3,616	3,097	2,882	16.7%
2	China	3,501	3,281	3,199	6.7%
3	Hong Kong, China	3,499	3,350	3,216	4.5%
4	Taiwan, prov of China	3,354	3,147	3,115	6.6%
5	Egypt, Arab Rep.	3,347	2,846	2,542	17.6%
6	Germany	3,276	2,855	2,778	14.7%
7	Canada	3,211	3,074	3,022	4.5%
8	Oman	3,199	3,595	3,215	-11.0%
9	Panama	3,111	2,855	2,895	9.0%
10	United Kingdom	3,087	2,672	2,520	15.5%

6) Maximum vessel sizes

In July 2006, there were eleven countries that were served by vessels of 9200 TEU capacity and above. The largest container ships are all deployed on the Europe-Asia route. As the new, larger, vessels are deployed on the main East-West routes, this also has implications for other countries as medium sized ships are re-deployed. 94 countries received larger ships in 2006 than in 2004, meaning that most of them most likely had to invest in dredging and infrastructure so as to accommodate those larger vessels.

Table 6: Maximum vessel sizes

Rank 2006	Country or territory	2006	2005	2004	change 2006/2005
1	Belgium	9,449	8,468	8,076	11.6%
1	China	9,449	9,200	8,238	2.7%
1	Egypt, Arab Rep.	9,449	8,073	6,978	17.0%
1	Germany	9,449	8,750	8,076	8.0%
1	Hong Kong, China	9,449	9,200	8,238	2.7%
1	Netherlands	9,449	8,750	8,076	8.0%
1	Singapore	9,449	8,750	8,063	8.0%
1	United Kingdom	9,449	8,750	8,076	8.0%
10	France	9,200	9,200	6,978	0.0%
10	Korea, Rep.	9,200	8,189	6,978	12.3%
10	Spain	9,200	8,189	6,742	12.3%

The new LSCI 2006

If we combine the available information about fleet assignment, liner services, and vessel and fleet sizes, it is possible to generate an overall "Liner Shipping Connectivity Index" (LSCI) (Table 7). In order to allow a comparison over time, the maximum value of the LSCI is set to be equal to 1.0 in 2004.

Table 7: Liner Shipping Connectivity Index LSCI for 2004, 2005 and 2006

(Maximum index 2004 = 100)

Rank 2006	Country or territory	2006	2005	2004	Change 2006-05
1	China	113.1	108.3	100.0	4.8
2	Hong Kong, China	99.3	96.8	94.4	2.5
3	Singapore	86.1	83.9	81.9	2.2
4	United States	85.8	87.6	83.3	-1.8
5	United Kingdom	81.5	79.6	81.7	1.9
6	Netherlands	81.0	80.0	78.8	1.0
7	Germany	80.7	78.4	76.6	2.3
8	Belgium	76.1	74.2	73.2	2.0
9	Korea, Rep.	71.9	73.0	68.7	-1.1
10	Malaysia	69.2	65.0	62.8	4.2
11	France	67.8	70.0	67.3	-2.2
12	Taiwan, prov of China	65.6	63.7	59.6	1.9
13	Japan	64.5	66.7	69.1	-2.2
14	Spain	62.3	58.2	54.4	4.1
15	Italy	58.1	62.2	58.1	-4.1
16	Egypt, Arab Rep.	50.0	49.2	42.9	0.8
17	United Arab Emirates	46.7	39.2	38.1	7.5
18	India	42.9	36.9	34.1	6.0
19	Saudi Arabia	40.7	36.2	35.8	4.4
20	Sri Lanka	37.3	33.4	34.7	4.0
21	Canada	36.3	39.8	39.7	-3.5
22	Thailand	33.9	31.9	31.0	2.0
23	Brazil	31.6	31.5	25.8	0.1
24	Greece	31.3	29.1	30.2	2.2
25	Malta	30.3	25.7	27.5	4.6
26	Mexico	29.8	25.5	25.3	4.3
27	Sweden	28.2	26.6	14.8	1.6
28	Panama	27.6	29.1	32.1	-1.5
29	Turkey	27.1	27.1	25.6	0.0
30	Australia	27.0	28.0	26.6	-1.1
31	South Africa	26.2	25.8	23.1	0.4
32	Indonesia	25.8	28.8	25.9	-3.0
33	Argentina	25.6	25.0	20.1	0.6
34	Lebanon	25.6	12.5	10.6	13.0
35	Denmark	25.4	24.2	11.6	1.1
36	Portugal	23.5	16.8	17.5	6.7
37	Jamaica	23.0	22.0	21.3	1.0
38	Pakistan	21.8	21.5	20.2	0.3
39	New Zealand	20.7	20.6	20.9	0.1
40	Colombia	20.5	19.2	18.6	1.3
41	Israel	20.4	20.1	20.4	0.4
42	Oman	20.3	23.6	23.3	-3.4
43	Venezuela, RB	18.6	19.9	18.2	-1.3
44	Guatemala	18.1	13.9	12.3	4.3
45	Romania	17.6	15.4	12.0	2.2
46	Cyprus	17.4	18.5	14.4	-1.1
47	Iran, Islamic Rep.	17.4	14.2	13.7	3.1
48	Uruguay	16.8	16.6	16.4	0.2
49	Philippines	16.5	15.9	15.4	0.6
50	Peru	16.3	15.0	14.8	1.4
51	Bahamas, The	16.2	15.7	17.5	0.5
52	Chile	16.1	15.5	15.5	0.6
53	Dominican Republic	15.2	14.0	12.4	1.2
54	Vietnam	15.1	14.3	12.9	0.8
55	Costa Rica	15.1	11.1	12.6	4.0
56	Ukraine	14.9	10.8	11.2	4.1
57	Puerto Rico	14.7	15.2	14.8	-0.6
58	Ecuador	14.2	12.9	11.8	1.3
59	Ghana	13.8	12.6	12.5	1.2
60	Nigeria	13.0	12.8	12.8	0.2
61	Cote d'Ivoire	13.0	14.5	14.4	-1.5
62	Jordan	13.0	13.4	11.0	-0.4

Rank 2006	Country or territory	2006	2005	2004	Change 2006-05
63	Russian Federation	12.8	12.7	11.9	0.1
64	Mauritius	11.5	12.3	13.1	-0.7
65	Cameroon	11.4	10.6	10.5	0.8
66	Syrian Arab Republic	11.3	11.8	8.5	-0.6
67	Senegal	11.2	10.1	10.1	1.2
68	Trinidad and Tobago	11.2	10.6	13.2	0.6
69	Togo	11.1	10.6	10.2	0.5
70	Slovenia	11.0	13.9	13.9	-2.9
71	Benin	11.0	10.2	10.1	0.8
72	Croatia	10.5	12.2	8.6	-1.7
73	Guam	9.6	10.5	10.5	-1.0
74	Angola	9.5	10.5	9.7	-1.0
75	Yemen, Rep.	9.4	10.2	19.2	-0.8
76	Kenya	9.3	9.0	8.6	0.3
77	Congo, Rep.	9.1	9.1	8.3	0.0
78	New Caledonia	9.0	10.3	9.8	-1.3
79	French Polynesia	8.9	11.1	10.5	-2.2
80	Gabon	8.7	8.8	8.8	0.0
81	Tanzania	8.7	8.6	8.1	0.1
82	Guinea	8.7	6.9	6.1	1.8
83	Algeria	8.7	9.7	10.0	-1.0
84	Finland	8.6	10.2	9.4	-1.6
85	Morocco	8.5	8.7	9.4	-0.1
86	Namibia	8.5	6.6	6.3	1.9
87	Madagascar	8.3	6.8	6.9	1.5
88	Honduras	8.3	8.6	9.1	-0.3
89	Ireland	8.2	9.7	8.8	-1.5
90	El Salvador	8.1	7.3	6.3	0.8
91	Nicaragua	8.1	5.2	4.8	2.8
92	Netherlands Antilles	7.8	8.2	8.2	-0.4
93	Aruba	7.5	7.5	7.4	0.0
94	Poland	7.5	7.5	7.3	0.0
95	Djibouti	7.4	7.6	6.8	-0.2
96	Norway	7.3	8.3	9.2	-1.0
97	Fiji	7.2	8.3	8.3	-1.1
98	Tunisia	7.0	7.6	8.8	-0.6
99	Mozambique	6.7	6.7	6.6	0.0
100	Cuba	6.4	6.5	6.8	-0.1
101	Paraguay	6.3	0.5	0.5	5.8
102	Mauritania	6.2	6.0	5.4	0.3
103	Estonia	5.8	6.5	7.1	-0.8
104	Sudan	5.7	6.2	6.9	-0.5
105	Lithuania	5.7	5.9	5.2	-0.2
106	St. Kitts and Nevis	5.6	5.3	5.5	0.3
107	Comoros	5.4	5.8	6.1	-0.5
108	Barbados	5.3	5.8	5.5	-0.4
109	Bangladesh	5.3	5.1	5.2	0.2
110	Seychelles	5.3	4.9	4.9	0.3
111	Sierra Leone	5.1	6.5	5.8	-1.4
112	Latvia	5.1	5.8	6.4	-0.7
113	Samoa	5.1	5.3	5.4	-0.2
114	Guinea-Bissau	5.0	5.2	2.1	-0.2
115	American Samoa	4.9	5.3	5.2	-0.4
116	Gambia, The	4.8	6.1	4.9	-1.3
117	Iceland	4.7	4.9	4.7	-0.1
118	Libya	4.7	5.2	5.3	-0.5
119	Papua New Guinea	4.7	6.4	7.0	-1.7
120	Guyana	4.6	4.4	4.5	0.2
121	Liberia	4.5	6.0	5.3	-1.4
122	Bulgaria	4.5	5.6	6.2	-1.1
123	Tonga	4.4	4.8	3.8	-0.3
124	Bahrain	4.4	4.3	5.4	0.1
125	Faeroe Islands	4.4	4.4	4.2	0.0
126	Vanuatu	4.4	4.5	3.9	-0.1
127	Kuwait	4.1	6.8	5.9	-2.6
128	Iraq	4.1	1.6	1.4	2.4
129	Solomon Islands	4.0	4.3	3.6	-0.3
130	Qatar	3.9	4.2	2.6	-0.3
131	Maldives	3.9	4.1	4.2	-0.2
132	Suriname	3.9	4.2	4.8	-0.3
133	Equatorial Guinea	3.8	3.9	4.0	-0.1
134	St. Lucia	3.4	3.7	3.7	-0.3
135	St. Vincent and the Grenadines	3.4	3.6	3.6	-0.2
136	Grenada	3.4	2.5	2.3	0.8
137	Brunei	3.3	3.5	3.9	-0.2
138	Marshall Islands	3.3	3.7	3.5	-0.4
139	Virgin Islands (U.S.)	3.2	3.0	1.8	0.2
140	Switzerland	3.2	3.4	3.5	-0.2
141	Kiribati	3.1	3.3	3.1	-0.2
142	Serbia	3.0	2.9	2.9	0.0
143	Georgia	2.9	3.8	3.5	-0.9
144	Cambodia	2.9	3.3	3.9	-0.3
145	Haiti	2.9	3.4	4.9	-0.5
146	Cape Verde	2.8	2.3	1.9	0.5
147	Congo, Dem. Rep.	2.7	3.0	3.0	-0.4
148	Belize	2.6	2.6	2.2	0.0
149	Myanmar	2.5	2.5	3.1	0.1
150	Antigua and Barbuda	2.4	2.6	2.3	-0.1
151	Somalia	2.4	1.3	3.1	1.1
152	Dominica	2.3	2.5	2.3	-0.2
153	Greenland	2.3	2.3	2.3	0.0
154	Eritrea	2.2	1.6	3.4	0.7
155	Micronesia, Fed. Sts.	1.9	2.9	2.8	-0.9
156	Palau	1.9	1.0	1.0	0.8
157	Northern Mariana Islands	1.8	2.2	2.2	-0.3
158	Cayman Islands	1.8	2.2	1.9	-0.4
159	Sao Tome and Principe	1.6	1.3	0.9	0.3
160	Bermuda	1.6	1.6	1.5	0.0
161	Czech Republic	0.4	0.4	0.4	0.0
162	Albania	0.4	0.4	0.4	0.0

Note: The indexes for 2004, 2005 and 2006 presented above are a simplified version of the LSCI initially presented in UNCTAD's Transport Newsletters for the years 2004 and 2005. For clarity purposes and long term consistency we recalculated the index to include only the five original com-

ponents, i.e. the number of ships, TEU, number of companies, number of services and the maximum vessel size.[4]

Some of the countries with the lowest LSCI do not necessarily depend on national ports, but rather trade via land transport with other countries in the region, or they are quasi-landlocked and mostly trade through neighbouring countries' ports (e.g. Albania, Czech Republic, Switzerland, and Georgia).

Most of the least connected countries are also developing countries, and a majority of them are Small Island Developing States. Whereas 75 per cent of the top 20 best connected countries recorded an improved LSCI between 2006 and 2004, only 30 per cent of the 20 least connected countries could improve their situation during the same period. Nine of the 20 least connected countries actually had a lower LSCI in 2006 as compared to 2004. The "connectivity gap" between the best and the least connected countries is increasing.

Direct liner shipping services between countries

There are 13,041 "pairs" between the 162 coastal countries and economies which receive liner shipping services.[5] Based on data from Containerization International On-line, UNCTAD has gathered information on those pairs of countries which rely on direct liner shipping services, i.e. where regular direct container shipping services are provided by at least one liner company.

In July 2006, 2,214 (17 per cent) of the 13,041 routes were serviced by direct shipping connections. Containerized trade on the remaining 10,827 routes required at least one transhipment. For those 2,214 routes with direct services, the following indicators of "connectivity" were computed:

- The average number of companies providing direct services per route is 5.6. The maximum number is 82, on the route between the Netherlands and the United Kingdom.
- The average number of ships deployed per route is 28. The maximum number is 1,028 on the route between China and Hong Kong, China.
- The average TEU deployed per route is 82,429. The maximum is 3,839,910 TEU, also on the route between China and Hong Kong, China.

At UNCTAD, We are in the process of undertaking further analysis of the data so as to generate indicators of "connectivity" between all pairs of countries, incorporating maritime and land distances, land connectivity, and also shipping services involving one or more transhipments. Research on transport costs and on the geography of trade confirms that transport connectivity is an important determinant of both. Quantifying and producing indicators for transport connectivity between pairs of countries can thus help to better analyse trade flows and their costs.

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[4] The per-capita indicators (ships/capita and TEU/per capita) that had been included in the 2004 and 2005 index are no longer included because the adjustment for population sizes was considered somewhat arbitrary; furthermore it was found that available data for population sizes of several countries and territories could not be updated annually. The two coefficients of original indicators (TEU/ship and ships/company) were excluded because of methodological concerns regarding the calculation of an index if components are included more than once and in different forms. The new, simplified, index is easier to calculate and it allows for a clearer interpretation: It is the un-weighted average of five components, i.e. ships, TEU, companies, services and maximum vessel size. Each one of the five components is indexed to assume a maximum value of 100 in 2004. As a second step, the average of the five indexed components is again indexed so that its maximum value for 2004 is 100.

[5] See above the article on the Liner Shipping Connectivity Index. The number of "pairs" of countries is ((162 x 162) – 162) /2 = 13041. Information about the top 25 routes was included in the previous issue of the UNCTAD Transport Newsletter.

UNCTAD's Commission on Enterprise, Business Facilitation and Development

UNCTAD's Commission on Enterprise, Business Facilitation and Development will meet for its eleventh session on 19–23 February 2007 in Geneva. Item 4 of the agenda is "Efficient Transport and Trade Facilitation to Improve Participation by Developing Countries in International Trade".

Trade facilitation and transport connectivity are important determinants of developing countries' supply capacity and competitiveness in global markets. Countries need to set an appropriate regulatory and legal framework, reflecting national circumstances and priorities. In view of the above, the UNCTAD secretariat's background document (TD/B/COM.3/80) discusses four related topics in the area of trade logistics that are of particular interest for developing and landlocked developing countries.

The first chapter deals with trade and transport facilitation, with special focus on setting facilitation priorities. Given limited resources, countries need to prioritize which trade and transport facilitation measures they should undertake, and in which order.

The second chapter examines the issue of international transport, with special focus on maritime transport connectivity. Although containerization has helped improve connectivity between practically all countries, large differences remain that have a bearing on transport costs and trade competitiveness.

The third chapter looks at the legal and regulatory framework for transport and trade facilitation, with special focus on security and environmental issues.

The fourth chapter considers the three issues of facilitation, transport connectivity and the legal framework from the perspective of landlocked developing countries (LLDCs). In view of their geographic disadvantage, trade facilitation, improved transport connectivity and legal reforms are of primary importance for LLDCs.

The background document is available via http://www.unctad.org/en/docs/c3d80_en.pdf
For more information about the Commission see
www.unctad.org/Templates/Meeting.asp?intItemID=1942&lang=1&m=12715&year=2007&month=2

Publications and Proceedings

European Journal of Transport and Infrastructure Research

Volume 6, Issue 4, online November 22nd, 2006, ISSN 1567-7141

Peter van der Waerden, Aloys Borgers and Harry Timmermans: Attitudes and Behavioral Responses to Parking Measures

Jean-Marc Timmermans, Julien Matheys, Joeri Van Mierlo and Philippe Lataire: Environmental rating of vehicles with different fuels and drive trains: a univocal and applicable methodology

Caspar G. Chorus, Eric J.E. Molin, Bert van Wee: Travel information as an instrument to change car-drivers' travel choices: a literature review

Dominic Stead: Mid-term review of the European Commission's 2001 Transport White Paper

Peter Nijkamp: Book Review: Global Competition in Transportation Markets: Analysis and Policy Making (A. Kanafani and K. Kuroda (eds.))

Henk Meurs: Book Review: Handbook of Transport Geography and Spatial Systems (D. Hensher, K. Button, K. Haynes and P. Sopher (eds.))

http://www.ejtir.tbm.tudelft.nl

World Review of Intermodal Transportation Research

The first issue of "WRITR" has come out in November. The contents of this first issue:

Editorial: Dawna L. Rhoades

Sveinn Vidar Gudmundsson: A Global Electronic Market (GEM) for Logistics Services and Supply-Chain Management: The Expert View

Uche Okongwu: Integration of Supply Chain Management Systems

Sed S. Saad: ITS in Japan, a Different Approach to Transportation Policy

Seock-Jin Hong and Il-Soo Jun: An Evaluation of the Service Quality Priorities of Air Cargo Service Providers and Customers

M. Sadiq Sohail: Benchmarking Usuage of Third Party Logistics: A Comparison of Practices between Firms in Malaysia and Saudi Arabia

Dawna L. Rhoades, Michael J. Williams, and Dustin J. Green: Imperfect Substitutes: Competitive Analysis Failure in US Intercity Passenger Rail

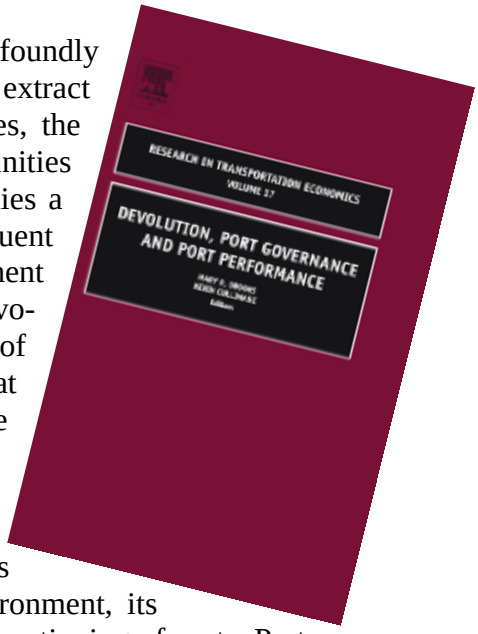
John F. O'Connell: The Changing Dynamics of the Arab Gulf based Airlines and an Investigation into the Strategies that are Making Emirates into a Global Challenger

Dawna L. Rhoades: Book Review: Wedding of the Waters: The Erie Canal and the Making of a Great Nation

http://www.inderscience.com/browse/index.php?journalCODE=writr

Devolution, Port Governance and Port Performance

Edited by Dr. Mary R Brooks and Kevin Cullinane

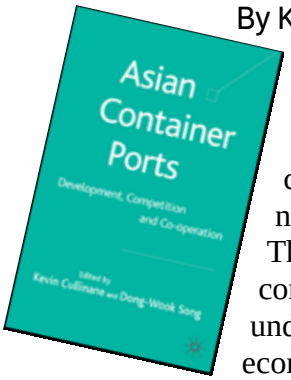


The relationship between ports and governments has changed profoundly over the past quarter of a century. Many governments have sought to extract themselves from the business of port operations and, in many cases, the provision of port services has devolved to local governments, communities or private management and administration. As such devolution implies a change in governance model, this trend raises questions about consequent performance. This issue examines the changed port management environment, focusing particularly on government policies such as devolution, regulatory reform and newly imposed governance models, all of which have exerted a significant influence over the nature of that changed environment. The issue is structured so as to first explore the devolution and port reform approaches for 14 countries or regions, before examining how ports are governed and what the choice of governance might mean for their performance. Part I introduces the issue, and provides a framework for defining the basic concepts involved in devolution; it paints a picture of the current port environment, its likely future evolution and the expected impact this will have on the functioning of ports. Part II examines the port industry in 14 countries or administrations, and presents the thinking behind any devolution programs that have been implemented. Part III focuses on port governance and devolution generally, and examines governance from both strategic management and economics perspectives, including topics such as governance models, supranational governance and stakeholder conflict. Part IV examines the measurement of port performance and closes by providing conclusions and a future research agenda. This issue will be of interest to port managers, government officials and academics alike.

Published November 2006, 696 pages, Hardback, Price: USD $130, GBP £75.00, EUR €110.00. ISBN-13: 978-0-7623-1197-2, ISBN-10: 0-7623-1197-5

http://www.elsevier.com/locate/isbn/0762311975

Asian Container Ports



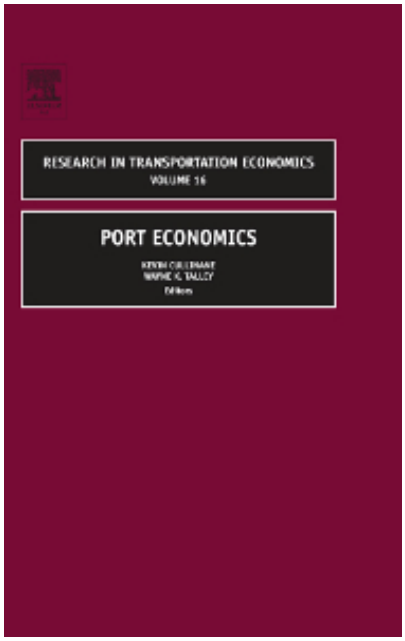
By Kevin Cullinane and Dong-Wook Song

The container port industry in Asia represents a dynamic aspect of the international transport and logistics scene. This book applies an overarching theme of 'Development, Competition and Co-operation' to a wide range of individual container ports in Asia. Major trends are identified and concrete examples provide new insights into the nature of relationships between the main ports in the region. The contents provide a great deal of new analysis that contributes to theoretical and conceptual debates on the nature of port competition. More generally, it will aid understanding of port development strategies within the context of Asian trade and economic growth.

http://www.palgrave.com/newsearch/Catalogue.aspx?is=0230001955

Port Economics

Edited by Kevin Cullinane and Wayne Talley

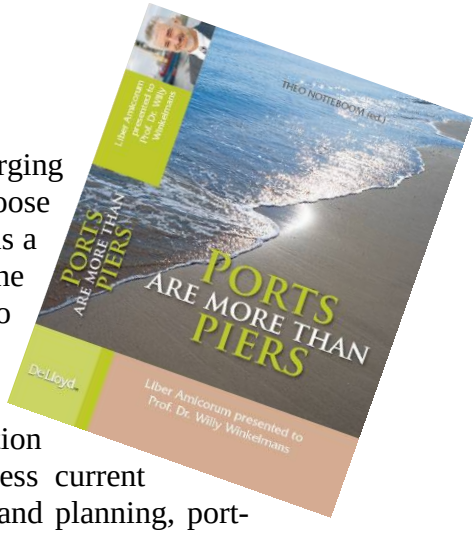


A port (or seaport) is a place that provides for the vessel transfer of cargo and passengers to and from waterways and shores. Port economics is concerned with the study of the economics of port services. Users of port services are those that utilize the port as part of the transportation process of moving cargo and passengers to and from origin and destination locations. Users include transportation carrriers such as shipping lines, railroads and trucking firms that perform these movements and shippers and individuals that provide the cargo and themselves as passengers to be transported. Port users demand port services, whereas port service providers such as the port terminal operator supply port services to port users. Port economics and shipping economics comprise the branch of economics known as maritime economics. This volume provides original contributions to the study of port economics: 1) the evolution of port economics; 2) economic theories of the port, port cost functions and port investment; and 3) empirical evidence on the relative efficiency of ports, the impact of ports on international maritime transport costs, the competitiveness of ports and the impact of deregulation on dockworker wages. Content: Introduction (Cullinane and Talley); The Evolution and Challenges of Port Economics (Heaver); An Economic Theory of the Port (Talley); Multiple Outputs in Port Cost Functions (Jara-Diaz, Martinez-Budria and Diaz-Hernandez); Estimating the Relative Efficiency of European Container Ports: A Stochastic Frontier Analysis(Cullinane and Song); The Impact of Port Characteristics on International Maritime Transport Costs (Wilmsmeier, Hoffmann and Sanchez); A Strategic Positioning Analysis for Ports (Haezendonck, Verbeke and Coeck); Port Investment: Profitability, Economic Impact and Financing (Enrico, Claudio and Marco); Shipping Deregulation's Wage Effect on Low and High Wage Dockworkers (Peoples, Talley and Thanabordeekij).

http://books.elsevier.com/uk/socsci/uk/subindex.asp?isbn=9780762311989&country=United+Kingdom&community=socsci&ref=&mscssid=7PPFA5L369VF9MXKPVJPAB5AQX7PE6K0

Ports are More Than Piers

The Liber Amicorum for Willy Winkelmans



Seaports are much more than just places for the loading and discharging of vessels. The global market place, with powerful and relatively footloose players, extensive business networks and complex logistics systems, has a deep impact on port competition and on the functioning of seaports. The logistics environment leaves port managers with the question how to respond effectively to market dynamics. But at the same time, seaports need to be embedded in their local multi-stakeholders' environment.

This book was presented to Prof. Dr. Willy Winkelmans by a selection of his Flemish friends and colleagues. Eighteen contributions address current challenges to ports. Areas covered include port policy, port strategy and planning, port-related knowledge clusters, port-hinterland relationships and seaport terminals. This book aims to advance and update our systematic thinking on seaports.

Full information is available on the website of ITMMA www.itmma.ua.ac.be, click on "New book release - Ports are more than piers" on the homepage.

International Conference on Motorways of the Sea

Friday, 2 February 2007. Pickaquoy Conference Centre, Kirkwall, Orkney Islands, Scotland, UK

The SUTRANET Motorways of the Sea conference is to be held in the historic city of Kirkwall, Orkney Islands on Friday 2 February, 2007, with an optional port and historic site study tour offered on Saturday 3 February, allowing participants the opportunity to stay the weekend in Orkney. This conference relates to Work Package 2 (Motorways of the North Sea) of the EU Interreg IIIB North Sea Programme funded SUTRANET project – www.sutranet.org. WP2 is led by Napier University, Edinburgh. The aim of the conference is to bring together experts and interested parties to explore possibilities and potentials for the development of a Motorway of the Sea for freight transport in the North Sea Region. Speakers include leading European policymakers, practitioners, innovators and investors in Motorways of the Sea. Delegates attending the conference will include representatives/experts from transport and logistics firms, seaports, shipping service providers, users and suppliers, government, and the research community. The event will have a specific focus on unitised transportation, with separate sessions for MoS policy aspects, RoRo and container MoS services, ports and logistics, and ship design/technology relating to MoS services. SUTRANET (Sustainable Transport Research & Development Network in the North Sea Region) is a project funded under the EC Interreg IIIB North Sea Programme. The vision of SUTRANET is to improve the knowledge-base for developing efficient and sustainable transport networks in the North Sea Region. SUTRANET is led by Aalborg University in Denmark and consists of ten partner organisations, including many of the major transport and logistics research institutes in Europe. The SUTRANET project consists of 4 work packages:

- North Sea Transport Research and Development Network
- Motorways of the North Sea
- Transport and Logistics Centres
- Training Programme Development

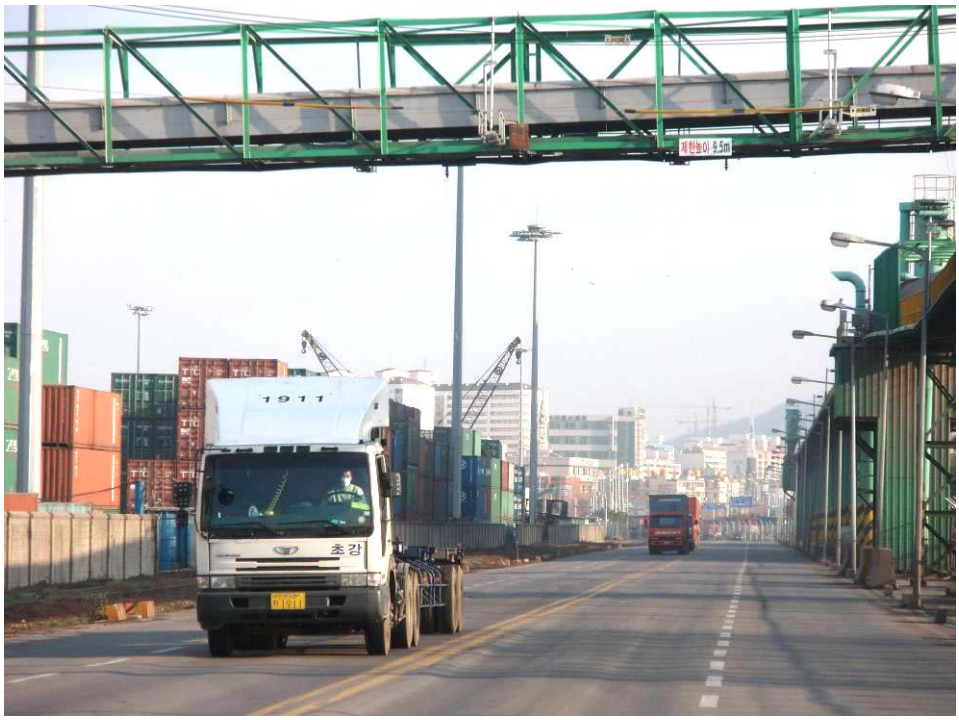
Professor Alfred J. Baird, a.baird@napier..ac.uk, Head, Maritime Research Group, Napier University Transport Research Institute, www.napier.ac.uk. EC SUTRANET www.sutranet.org.

Agenda on the GFP website

Please feel free to send me any announcement of upcoming events related to maritime transport and trade facilitation, so that I can update the agenda of the Global Facilitation Partnership: www.gfptt.org/topics/multimodal. Right now, the list announces the following events:

- Feb 02, 2007: Motorways of the Sea conference, Orkney Islands
- Mar 26-30, 2007: IMO FAL committee meeting, London
- Apr 17-21, 2007: Globalization and Freight Transportation in a Containerized World, San Francisco
- Jul 04-06, 2007: IAME 2007, Greece
- Sep 20- 21, 2007: Symposium on Maritime Safety, Security and Environmental Protection

GFP@JanHoffmann.info



Seoul, December 2006

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