

PEER LEARNING GROUP (PLG) MEETING of the
PRODUCTION TRANSFORMATION POLICY REVIEW (PTPR) of TOGO



In collaboration with



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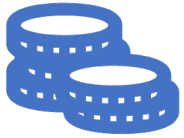
Professeur Affilié – World Maritime University

- 4 juillet 2023 -

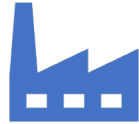
Agenda

1. Les ports maritimes sont **des lieux permettant la création de valeur...**
2. *mais ils sont aussi un « éco-système » avec de nombreux intérêts divergents ...*
3. *Besoin d'actions spécifiques (inclusivité).*

1. Les ports maritimes permettent de créer de la valeur pour l'économie mondiale...



Les ports sont
créateurs de
valeur...



... via production
(commodities) et
les échanges (biens
agric. et
manufacturés)

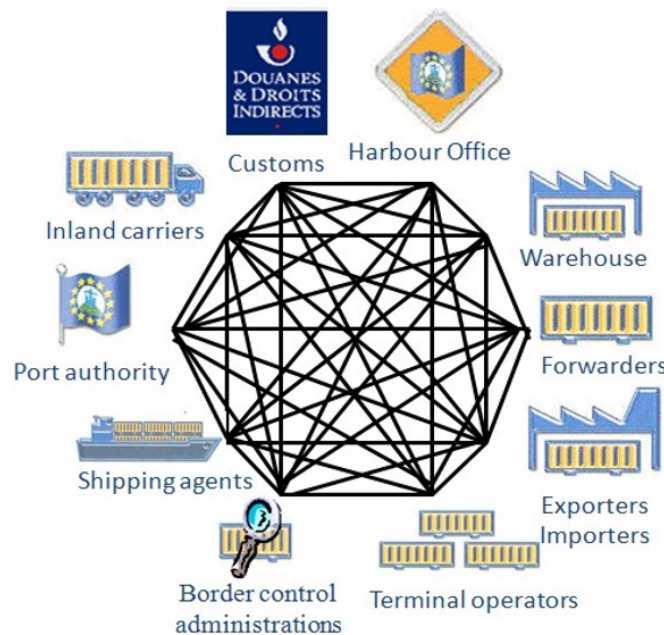


Les entreprises de
transport =>
capturent la valeur
et génèrent des
externalités



Les politiques doivent
mettre en place des
stratégies
logistiques/portuaires

2. Les ports sont un « éco-système » avec de nombreux intérêts divergents



	<i>Tools</i>		<i>Impact on the port system</i>
Shipping companies	<ul style="list-style-type: none"> ➤ Maximisation Profit ➤ Increase of Market share ➤ Control of logistic chain ➤ 	<ul style="list-style-type: none"> ➤ Tariffs ➤ Control of costs (Capacity, Volume, Transit time) ➤ Marketing ➤ Services 	<ul style="list-style-type: none"> ➤ Size of ships ➤ Rationalisation of shipping lines (co-slotting, Alliances, blank sailing..) ➤ Vertical and horizontal integration ➤ Dedicated terminals
Terminal operators	<ul style="list-style-type: none"> ➤ Maximisation Profit ➤ Increase of Market share ➤ Development of traffics (value added services in logistic...) 	<ul style="list-style-type: none"> ➤ Tariffs and services (ie. Windows for shipping lines and other value added services in logistic...) ➤ Technology ➤ Reliability 	<ul style="list-style-type: none"> ➤ Economy of scale on terminals ➤ Industrialisation of process.
Shippers	<ul style="list-style-type: none"> ➤ Maximisation profit ➤ Costs savings in the total logistic chain 	<ul style="list-style-type: none"> ➤ Power of bargaining / size 	<ul style="list-style-type: none"> ➤ Volatility
Inland carriers	<ul style="list-style-type: none"> ➤ Maximisation profit ➤ Increase of market share 	<ul style="list-style-type: none"> ➤ Tariffs, Technology ➤ Reliability, safety, green image ➤ Transit time ➤ Flexibility 	<ul style="list-style-type: none"> ➤ Competition between inland transports ➤ Need of inland infrastructures
Port Authorities	<ul style="list-style-type: none"> ➤ Minimisation of costs of the logistic chain ➤ Maximisation of port activities (freight and logistic/industrial implantations) ➤ Improving of fluidity, safety and security of the port 	<ul style="list-style-type: none"> ➤ regulation ➤ Infrastructure (ex : nautical access, inland transport infrastructure ...) ➤ Concession of lands ➤ Promotion ➤ Tariff policy 	<ul style="list-style-type: none"> ➤ Economic development of the port area.

		Nominal TEU tdw	LOA m	Breath m	Depth m	Draft m
OOCL HONG KONG 6 units in series from May 2017		21,413 teu 191,317 tdw	399.9	58.8	32.5	16.0
					Operated by OOCL Built by Samsung H.I.	
MADRID MAERSK 11 units in series from Apr 2017		20,568 teu 210,019 tdw	399.0	58.6	33.2	16.5
					Operated by Maersk Built by Daewoo (DSME)	
MOL TRIUMPH 6 units in series from Mar 2017		20,170 teu 192,672 tdw	400.0	58.8	32.8	16.0
					Operated by MOL Built by Samsung H.I.	
BARZAN 6 units in series from Apr 2015		19,870 teu 199,744 tdw	400.0	58.6	30.6	16.0
					Operated by UASC Built by Hyundai Samho/Hyundai H.I.	
MSC OSCAR 12 units in series from Jan 2015		19,224 teu 197,362 tdw	395.4	59.0	30.3	16.0
					Operated by MSC Built by Daewoo (DSME) MSC also has in addition 6 units built in Samsung and 2 units at Hyundai H.I.	
CSCL GLOBE 5 units in series from Nov 2014		18,982 teu 184,320 tdw	399.7	58.6	30.5	16.0
					Operated by COSCO Built by Hyundai H.I.	
Maersk 'EEE' 20 units in series from Jun 2013		18,340 teu 194,153 tdw	399.2	59.0	30.3	16.0
					Operated by Maersk Built by Daewoo (DSME)	

ALPHALINER

This article is based upon data sourced from an extensive study by the Hamburg-based OCEANS ONE management consultants.

Visit www.oceansone.de for more background information.

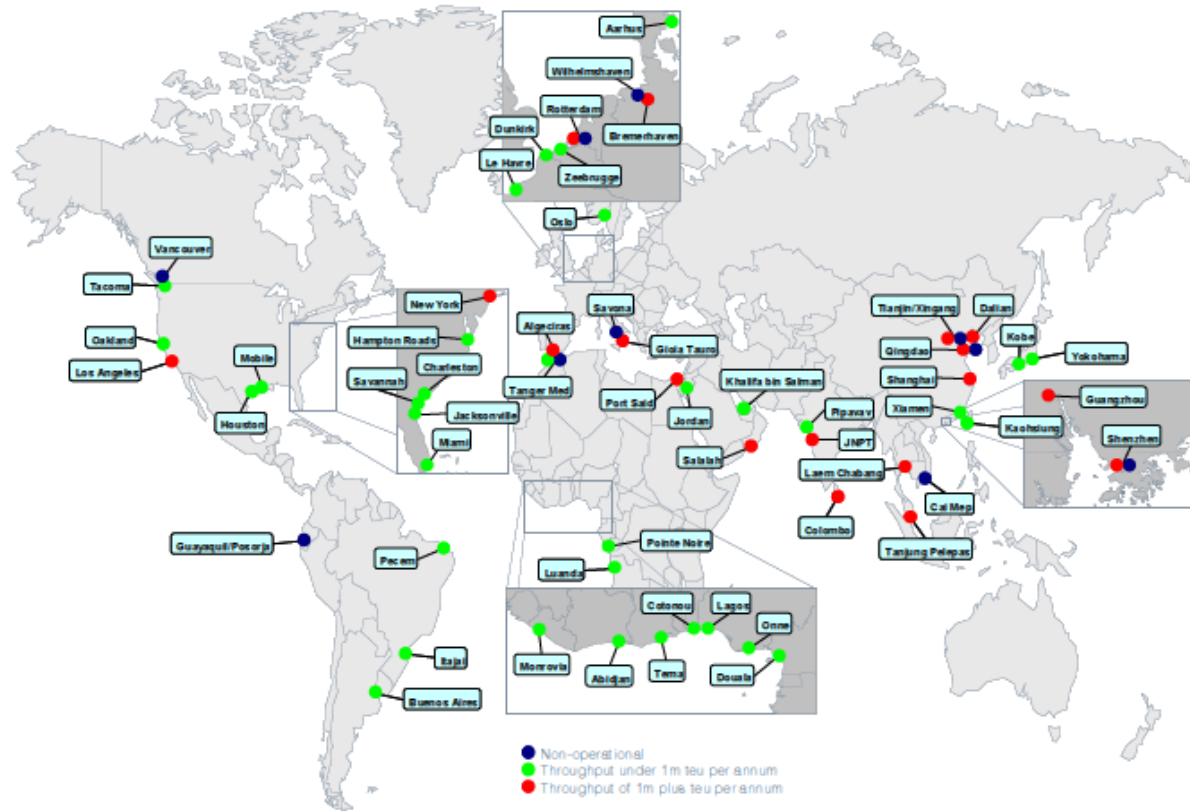
illustration: Alphaliner

hypothetical 'gigamax' ships: variants with 25 and 26 rows

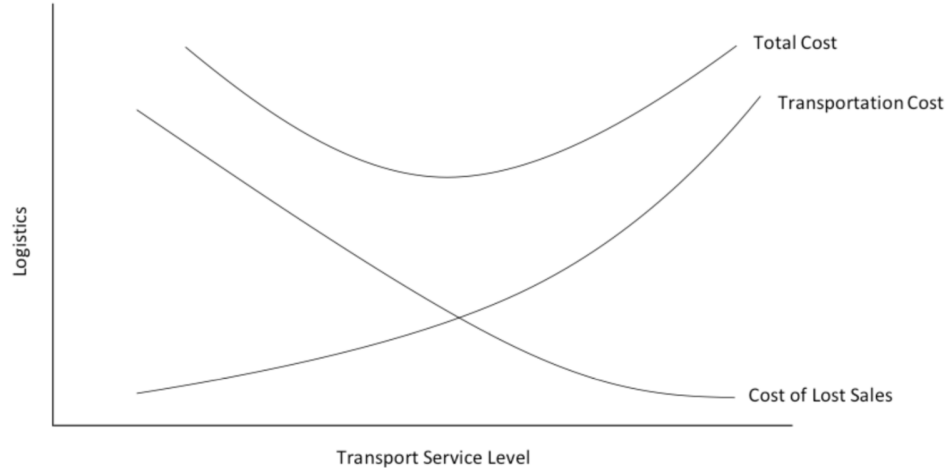
vessel class	B / R / T	length	breadth	depth	max teu
Megamax-23* (typical ship)	24 / 23 / 22	399.00 m	58.60 m	30.60 m	20,000 teu
Megamax-24* (typical ship)	24 / 24 / 25	399.00 m	61.00 m	33.20 m	23,500 teu
Gigamax-25	26 / 25 / 25	425.00 m	63.30 m	33.20 m	27,140 teu
Gigamax-25 LNG	26 / 25 / 25	425.00 m	63.30 m	33.20 m	26,800 teu
Gigamax-26	26 / 26 / 25	425.00 m	66.10 m	33.20 m	28,840 teu
Gigamax-26 LNG	26 / 26 / 25	425.00 m	66.10 m	33.20 m	28,420 teu



Figure 3.4 Location of APM Terminals owned/managed terminal operations

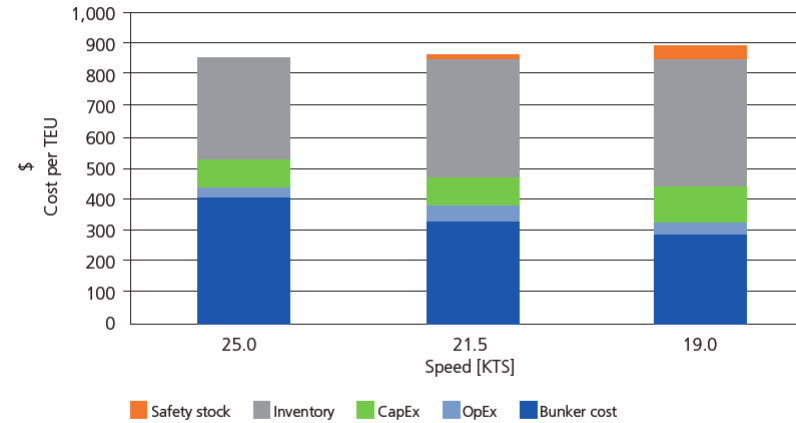


Les clients/les pays?



The General Relationship of the Cost of Lost Sales to Transportation Cost

TOTAL COST PER TEU INCLUDING INVENTORY COST
WITH A CARGO VALUE OF USD 14,000 PER TEU



» Figure 2: The average cost per TEU at 25 knots (8 ships), 21.5 knots (9 ships) and 19 knots (10 ships), including the shipper's inventory cost at a cargo value of USD 14,000 per TEU. For SS inventory only, the change from full speed is included.

Source: DNV (2012)

3. Besoin d'actions spécifiques (leviers) adaptées à la gouvernance du port

	Infrastructure	Superstructure	Services
Public port	Public	Public	Public
Tool port	Public	Public	Private
Landlord port	Public	Private	Private
Private port	Private	Private	Private

Arrière-pays des ports => Attractivité/connectivité + Concurrence inter-portuaire

MARIT. POL. MGMT., JULY-SEPTEMBER 2005
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Routledge
Taylor & Francis Group

Port regionalization: towards a new phase in port development

THEO E. NOTTEBOOM*† and JEAN-PAUL RODRIGUE‡

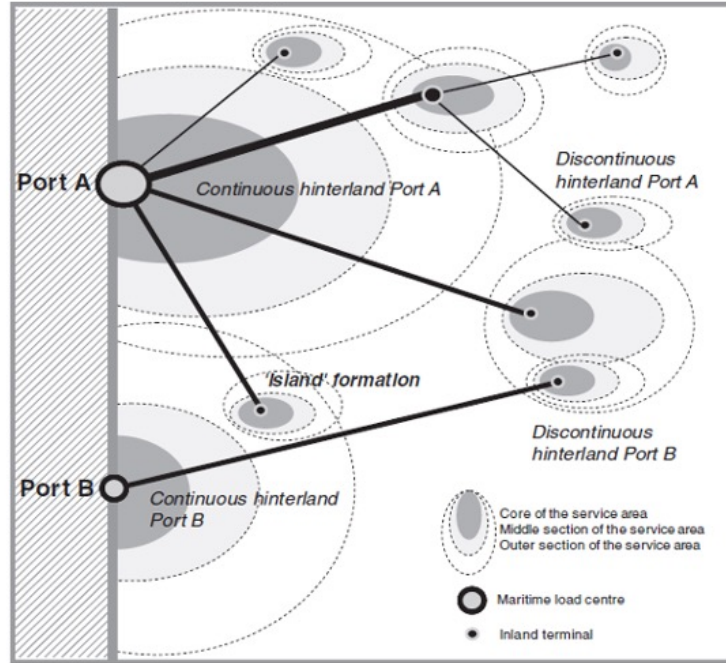


Figure 3. Intruding the natural hinterland of rival ports through the creation of corridor-based 'islands' in the distant hinterland.



Natural hinterland



Distant hinterland

Concession=> comportement et performance

DRAFT

"The English version has been drawn up only for information purposes and has no contractual value.
In case of discrepancy, the French original text shall prevail".

OPERATING AGREEMENT PORT 2000

The present agreement is entered into by and between:

- the Port of Le Havre Authority, represented by its Director, being duly authorised to do so by decision of the meeting of the board of directors dated....., hereinafter referred to as "the Port";

- and , represented by Mr., hereinafter referred to as "the Contractor" in the present agreement.

Article 1 Purpose of the present agreement

The purpose of the present Terminal Operating Authorisation Agreement (within the meaning of article R. 115-14 of the French Seaport Code of law) is to define the operating and construction conditions for the **Port 2000 terminal** involving the property located behind the quay between m.p. and m.p.

It comprises the exclusive authorisation to occupy and make use of the public domain to carry out the work involved, for the term indicated in article 13 hereinafter, within the perimeter defined in the plan specifying its location within the port precinct, as scheduled to the present agreement (appendix 1).

The terminal will enter into service in 2 (two) successive phases:

- an initial phase, concerning the quay berths located between m.p. and
- a second phase concerning the quay berths to be built, located between m.p. and within an indicative period of 2 (two) to 3 (three) years after the 2 (two) first berths, subject to the provisions of the present agreement.

The work phase related to this extension will be organised in a concerted manner by and between the parties hereto. The Port will take all the necessary measures to limit the operating constraints resulting from the aforementioned work, said constraints be supported by the Contractor, which hereby undertakes to do so.

The perimeter of the terminal (both phases) is defined by the **registered site plan** (scheduled hereto (appendix no.2)). It excludes the quay wall and the capping beam. It is specialised in berthing container ships and the resulting goods handling activities. Any change to this perimeter shall be subject to a rider to the present agreement as entered into by and between the parties hereto.

It is hereby specified that certain rights of way or easements of access are associated with certain parts of the property. These are subject to a special appendix (appendix no.3).

The Port authorises the Contractor to use the quay wall and the capping beam as the front rail supports for gantry cranes, it being stipulated that these items shall be responsibility of the Port.

The present agreement does not preclude the Port from authorising, by unilateral decision or any agreement entered into with other companies, performance of the same activities or trade in other parts of Port property.

The terminal concerned by the present agreement forms part of the development plan of the port of Le Havre and, for this reason, will benefit from all the general measures taken concerning containerised cargo.

DRAFT

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The Contractor may be led to displace its facilities 300 m to the East or to the West

- on request from the Port in the public interest, in accordance with the operating conditions of the terminal.

In such case the same procedure as that described in article 15.2. hereinafter and the terms of compensation stipulated in the last two paragraphs of article 15.4 hereinafter shall be applied.

- as a sanction in accordance with the conditions stipulated in articles 16.2 and 16.3 hereinafter.

Article 2 Terminal traffic objectives:

In order to ensure the development of activity within the port, the annual objective in terms of traffic for the terminal with 2 (two) berths is set at (.....) TEUs as of the first calendar year (January 1 to December 31) after entry into service as defined in article 11.1.2. hereinafter, and (.....) TEUs after 24 (twenty-four) months after entry into service. This objective will be changed to (.....) TEUs after 12 (twelve) months after entry into service of the 3rd berth and the corresponding surface area.

In the event of an extension to the terminal, in particular by adding operational surface area, the new objective will be specified by mutual agreement in a rider relating to this extension.

The objectives in terms of service quality are as follows:

1. Operations
The Contractor shall continue to develop quality objectives to maintain its rank among north European leaders in container handling.
2. Procedures

The Contractor shall sign the Port Community Quality Treaty dated 11 June 1997 relating to the management of entry/exit movements of container terminals within the Port area (all modes included) and shall adopt the optimisation initiative concerning the general organisation of access to the Port of Le Havre, related to the needs of the shipping line and proper operation of the terminal.

The parties hereto, at least once every year, on request from either of them and at the latest on 31 March, shall carry out a joint survey of the conditions under which these objectives are to be met. Further to the joint proposal and agreement by the Board of Directors of the Port, by the Government Commissioner and by the Comptroller General, the aforementioned objectives and their due date may be revised without affecting the general economic of the agreement, in particular to take into account market changes and new service requests.

Exemple: Operating agreement Le Havre Port 2000

Agreement with 20 articles:

Article 1-3: General considerations

Article 4-8: Facilities set up by the contractor/the port

Article 9-10: Obligation/liability

Article 11-13: **Fees**/taxes/duration of the agreement

Article 14-16: Breach of contract/Termination

Article 17: Status on expiry

Article 18-20: Cost of notification/Litigation

Article 11. Fees

The contractor must pay a yearly fee calculated as follows.

- The basic rate (R_o) is 2 €/m²/year (revised annually according to price index)
- The objective traffic is 500,000 TEU per year
- A reference traffic (T_r) is set at 70% of the objective traffic or 70% x 500.000 TEU = 350,000 TEU

Then, the yearly rent to be paid for reference year n (R_n) is:

$$R_n = R_0 \times K \text{ with } K = -30 \times (T_n / T_r) + 130$$

Example 1

If Year n , $T_n = 350,000$ for 35 ha

$$R_n = 2\text{€} \times (-30 \times (350,000 / 350,000) + 130)\% = 2\text{€}$$

$$\text{Yearly fee} = 2\text{€} \times 35 \text{ ha} = 700,000 \text{ €}$$

Example 2

Year n , $T_n = 500,000$ for 35 ha

$$R_n = 2\text{€} \times (-30 \times (500,000 / 350,000) + 130)\% = 2\text{€} \times 87\% = 1.74 \text{ €}$$

$$\text{Yearly fee} = 1.74\text{€} \times 35 \text{ ha} = 610,000 \text{ €}$$

CONCLUSIONS

- Les ports ont toujours été un lieu d'enjeux forts pour le développement des pays/régions
- Ils appellent un mode de gouvernance spécifique (“concession agreement”) qui doit être adapté:
 - au contexte du marché pertinent (géographique et économique).
 - au contexte historique (process dynamique de trajectoire de développement).