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

• 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 world’s largest ferries provide for 8kms of trucks into Dublin each morning
PORT COMPANIES

• Facilitators
• Movement of goods and people
• Characterised by
  – Relatively low revenues
  – Relatively 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 disconnection
- 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 performance, customs, local authorities, immigration, port state control etc.
So what?

• What can we do?
Innovation and competitiveness, 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 CO2 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