

## **1. INTRODUCTION**

### **1.1 Background to the study**

Ports of the ESCAP region have long-established tariff structures. These are contained in published schedules, which vary in length from a few pages to more than one hundred. Some tariffs are extremely complex while others are relatively simple. There is, however, an increasing desire on the part of port users for greater transparency in the billing of port services. This highlights the need for more easily understandable and comparable tariff structures.

In 1989, as an initiative to improve transparency across the region, the ESCAP secretariat developed the ESCAP/UNDP Model Port Tariff Structure. During the last decade, however, competition among ports around the world has increased dramatically owing to many factors, such as continued containerization and development of intermodal transport. Within this commercial context, ports are increasingly required to review their competitive position against neighbouring ports. The commercial reality in the era of globalization is that customers require a balance of cost and service. However, relativity in port charges seems essential in ensuring that a port is competitive in all areas, including cost. Hence, a cost comparison can provide a valuable perspective.

In order to address these issues, the ESCAP secretariat undertook a comparative study of port tariffs across a significant number of ports in the region. The study was carried out as a joint project under the Memorandum of Understanding, which was signed in 1998, between ESCAP and the Korea Maritime Institute.

### **1.2 Study approach and scope**

Any comparative study has to be based on a framework involving a number of assumptions. Therefore, it should be noted that the comparison does not represent all ports, but rather 21 ports in 17 countries across the region. The ports included were: Sydney (Australia); Shanghai, Tianjin (China); Hong Kong (Hong Kong, China); Chennai, Mumbai (India); Jakarta (Indonesia); Osaka, Yokohama (Japan); Port Klang (Malaysia); Yangon (Myanmar); Auckland (New Zealand); Karachi (Pakistan); Manila (Philippines); Busan (Republic of Korea); Singapore (Singapore); Colombo (Sri Lanka); Kaohsiung (Taiwan Province of China); Bangkok, Laem Chabang (Thailand); and Saigon Port (Viet Nam).

The basis of the comparative assessment is not a comparison against each other, but against the ESCAP/UNDP Model Port Tariff structure published in 1989. It is appropriate to place the comparisons against a recognized model that provides a useful framework for analysis.

The comparison of port tariffs, is based on two hypothetical types of container ship, namely 3,000 twenty-foot equivalent units (TEU) and 1,100 TEU ships. Although the cost comparison should not be considered a rating of cost in its own right, it provides a realistic snapshot of the outcomes arising from this approach.

A range of issues were identified from the study with regard to tariff setting models: costing approaches, the impact of exchange rates, capacity to adjust rates, the impact of privately operated ports and the price setting approach of ports and governments. These issues are discussed in the report.

This report is organized in five chapters including this introduction. Chapter 2 addresses the contextual issues relating to port pricing and outlines the ESCAP/UNDP Model Port Tariff Structure. Chapter 3 deals in detail with the comparative analysis of the approach to tariff structures. In Chapter 4, actual port tariff levels are compared among the ports of the region, based on the two hypothetical models. Chapter 5, in conclusion, also discusses a range of issues that emerged during the study, including expectations of tariffs, revision processes and suggestions for countries to consider in any review process they may adopt in relation to port tariff setting.

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