

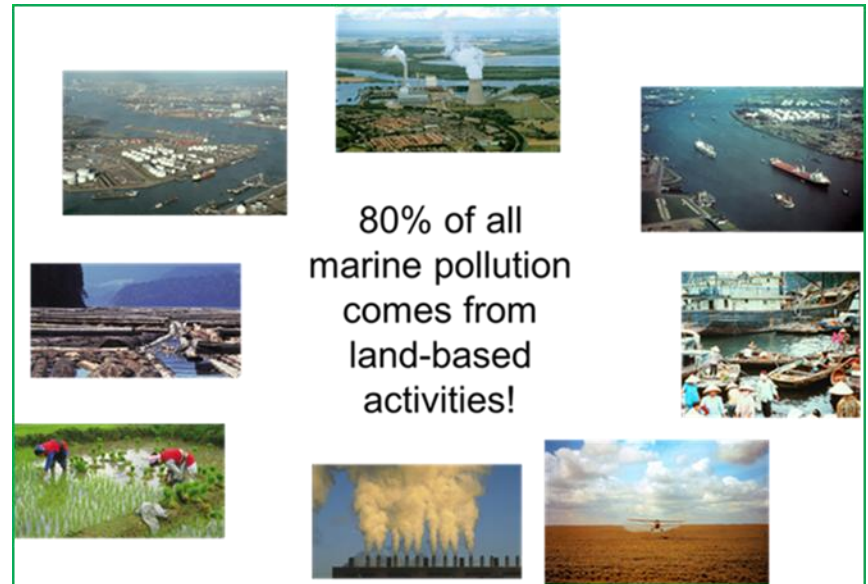
Maritime Enterprise Capacity Opportunities in Nigeria

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Global Maritime Environment

- Maritime industry is faced with tough competition in the world market; a market undergoing rapid change as a consequence of changes to the global distribution of work, consumer behaviour and digital and technological developments.



Maritime Enterprise Development

- The world depends on the ocean for trade, transport, energy, food, tourism, recreation and many other goods and services.
- Ocean faces multiple challenges due to increasing pressure from human impact
 - plastic pollution, overfishing, ocean acidification, etc.



U.N. Sustainable Development Goals (SDGs) 14: to U.N. Sustainable Development Goals (SDGs) the world pledged, in SDG 14, to “Conserve and sustainably use the oceans, seas and marine resources for sustainable development”.

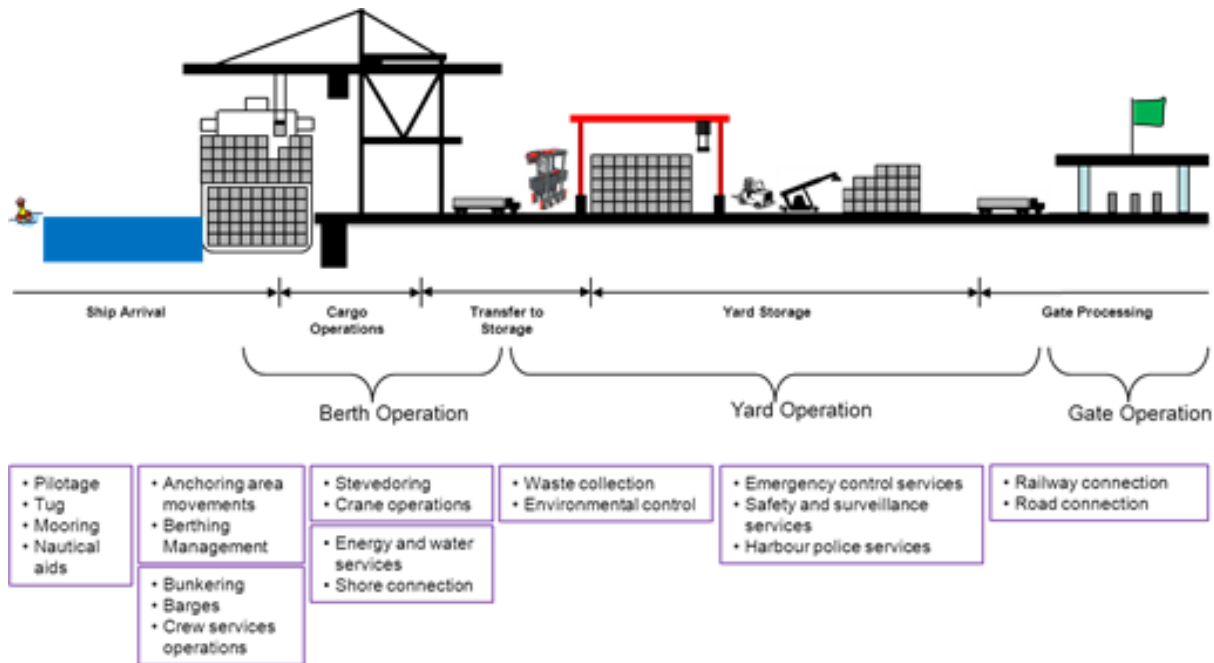
Shipping segments

- Shipping segments by geography of operation:
 - Deep-sea shipping
 - Short-sea shipping
 - Coastal shipping
 - Inland waterways.
- Shipping segments by operation
 - **Liner operations:** Liners operate according to a published itinerary and schedule similar to a bus line.
 - **Tramp operations:** Tramp ships follow the available cargoes similar to a removal van.
 - **Industrial operations:** Usually own the cargoes and control the vessels used. They operate within a wider company business framework, thus differ from other two segments.

Port

- Port management varies:
 - From port to port
 - From country to country
- Shipping companies in ports rely on many players:
 - Port itself
 - Pilots,
 - Towage services,
 - Ship repairers, provisioning,
 - Waste reception facilities
 - Bunkering companies

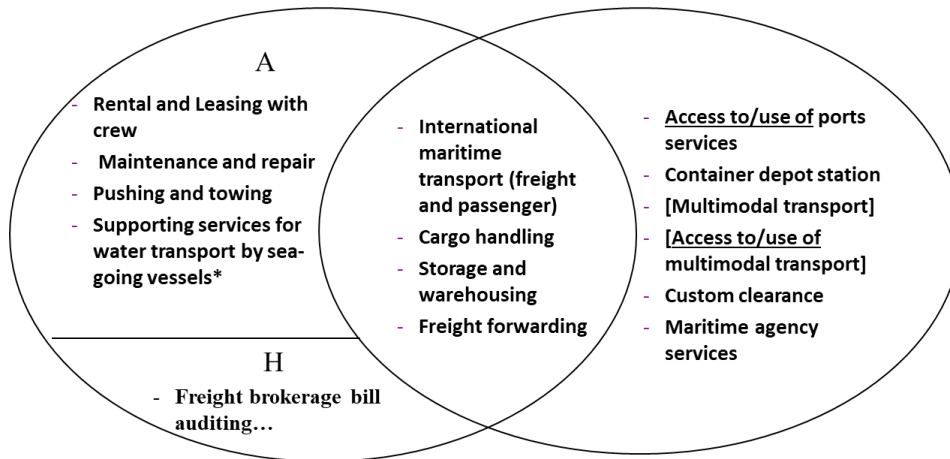
Diagram shows chain of ship-related activities/processes.
 Mainly two parts: (1) ship related activities (2) cargo related ones



Characteristics of Freight Terminals

Core	Infrastructure	Modal access (dock, siding, road), unloading areas
	Equipment	Intermodal lifting equipment, storing equipment
	Storage	Yard for empty and loaded containers
	Management	Administration, maintenance, access (gates), information systems
Ancillary	Trade facilitation	Free trade zone, logistical services
	Distribution centers	Transloading, cross-docking, warehousing, temperature controlled (cold chain)
	Storage depot	Container depot, bulk storage
	Container services	Washing, preparation, repair

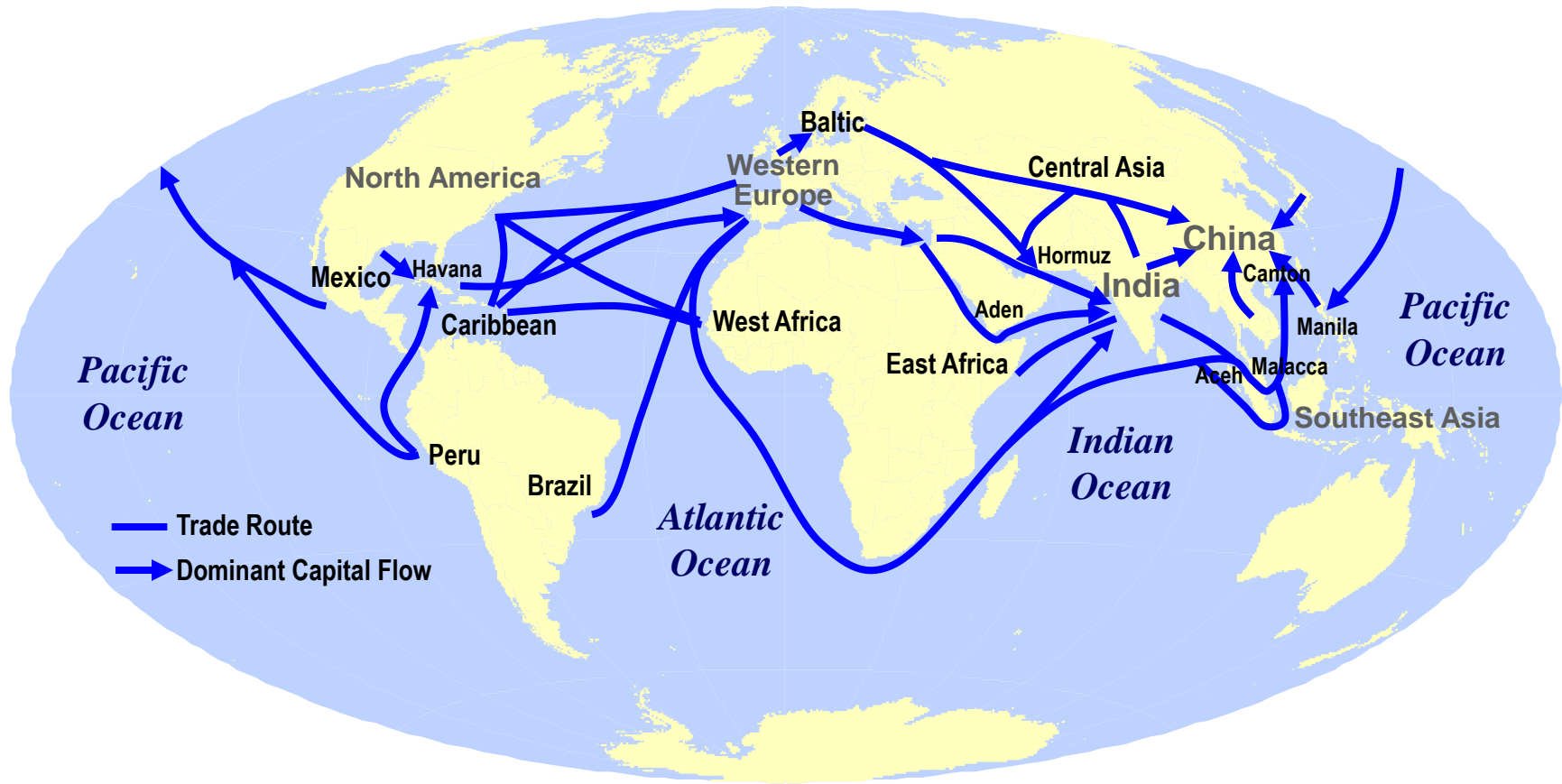
MARKET PLAYERS in shipping



*port and waterway operation, pilotage, navigation, aid, salvage, cleaning...

- Shipowners
- Charterers
- Shipbrokers
- Ship operator
- Sale & purchase broking
- Ship management
- Liner agents
- Dry cargo chartering
- Tanker chartering
- Port agency

Major Global Trade Routes, 1400-1800





• **Globalization of shipping industry**



• **Increase demands optimizing connection to the logistic chain**



25 years



• **Rapid developments of (new) technology and its potential use**

Enhance efficiency, need for:

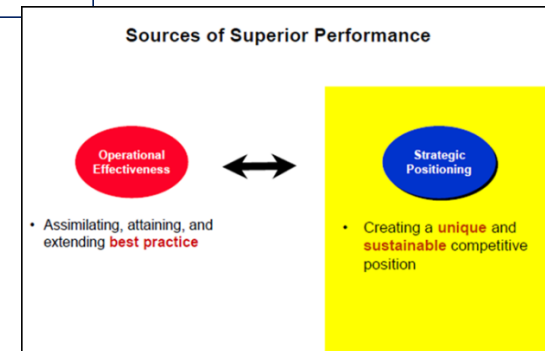
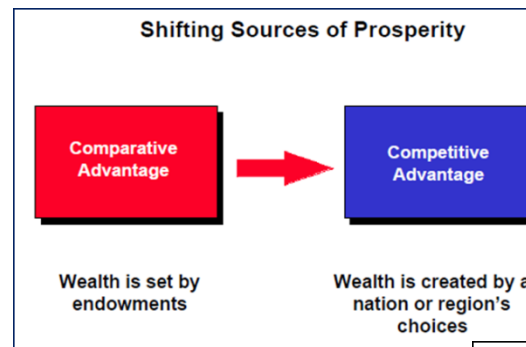
- planning tools,
- more reliable, timely data and information
- standardized reporting
- decrease administrative burden

Increasing user needs

- new services/applications,
- decision-making tools,
- software and hardware

Sustainable Ocean Resources development

- SDG 14 identification “Blue Economy” and “Blue Growth”) as panacea for Business growth and investment opportunities for responsible, sustainable ocean use .
- Blue economy considers the intersection of ocean economic benefits, environmental health and societal value in policies and best practices.
 - By combining purpose in innovation, competitiveness-productivity-profit and environmental impact,.
 - Ocean/Maritime Clusters can lead ocean sustainable development and realize economic benefits



Overview of Nigerian Maritime Environment

- ❑ Long coastline, unique location, large oil and gas deposit, large and growing population, among others.
- ❑ Nigeria's maritime environment is endowed with diversity of living resources
- ❑ Nigeria plays a key role in the West and Central African region and the entire Gulf of Guinea (GG).
 - ❑ domestic and international shipping traffic and maritime safety and security operations.
 - ❑ It constitute of about 55% of GoG region & "65% of cargo coming into Gulf of Guinea end up in Nigeria

Nigeria is strategically located along one of the most important and resource endowed coastal regions - the Gulf of Guinea



Nigeria boasts of vast resources to become the maritime hub for West and Central Africa.

Maritime Sector in Nigeria

- *Port terminals Concession*
- *Establishment of Maritime University Institutional Programmes:*
- *Cabotage Implementation Policy*
- Blue/Ocean economy
- Proactive leadership role in the Gulf of Guinea (GoG)
- Financial commitments at the national and other international levels.
- National and regional strategic policy review
- *Deep sea port*



Ship and Platform Opportunities I

Fisheries



Offshore oil/gas



Aquaculture



Ferries



Offshore wind energy



Wave/tidal energy



Ship and Platform Opportunities II



Projects and Engineering solutions



Insurance



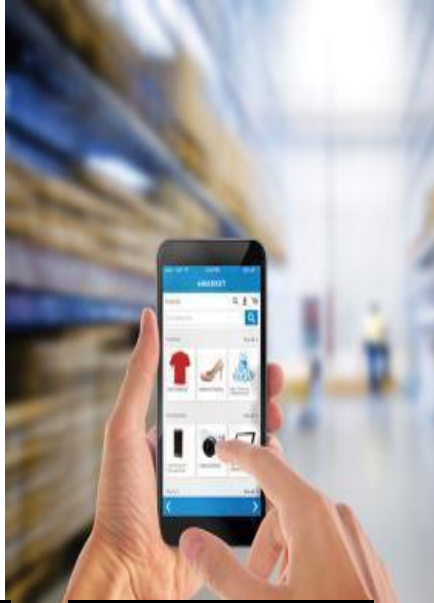
Leader in CFS-ICD



Haulage



Coastal Ship Owning



E-commerce Logistics

FUTURE SCENARIO

Ports will have to –

- Review it's position as a Regional or Feeder Port
- Review their hinterland traffic and connectivity (rail and road) – Is it sufficient and well connected?
- Marine Infrastructure – Deep draft, Tugs
- Container Handling Equipments – Twin Lift, Triple Lift, Quad Lift.
- Yard Space – Larger space required for higher parcel size, especially for transshipment traffic.
- Advance Technology in all aspects – Vessel Planning, Yard Management, Gate Entry / Exit
- Administration – Bureaucracy, Customs procedures etc



Emerging Paradigm in the Role of Port Authorities within their Port Regions

Conventional Port Authority

Landlord

- Planning and management of port area.
- Provision of infrastructures.

Regulator

- Planning framework.
- Enforcement of rules and regulations.

Operator

- Cargo handling.
- Nautical services (pilotage, towage, dredging).

Expanded Port Authority

Landlord

Regulator

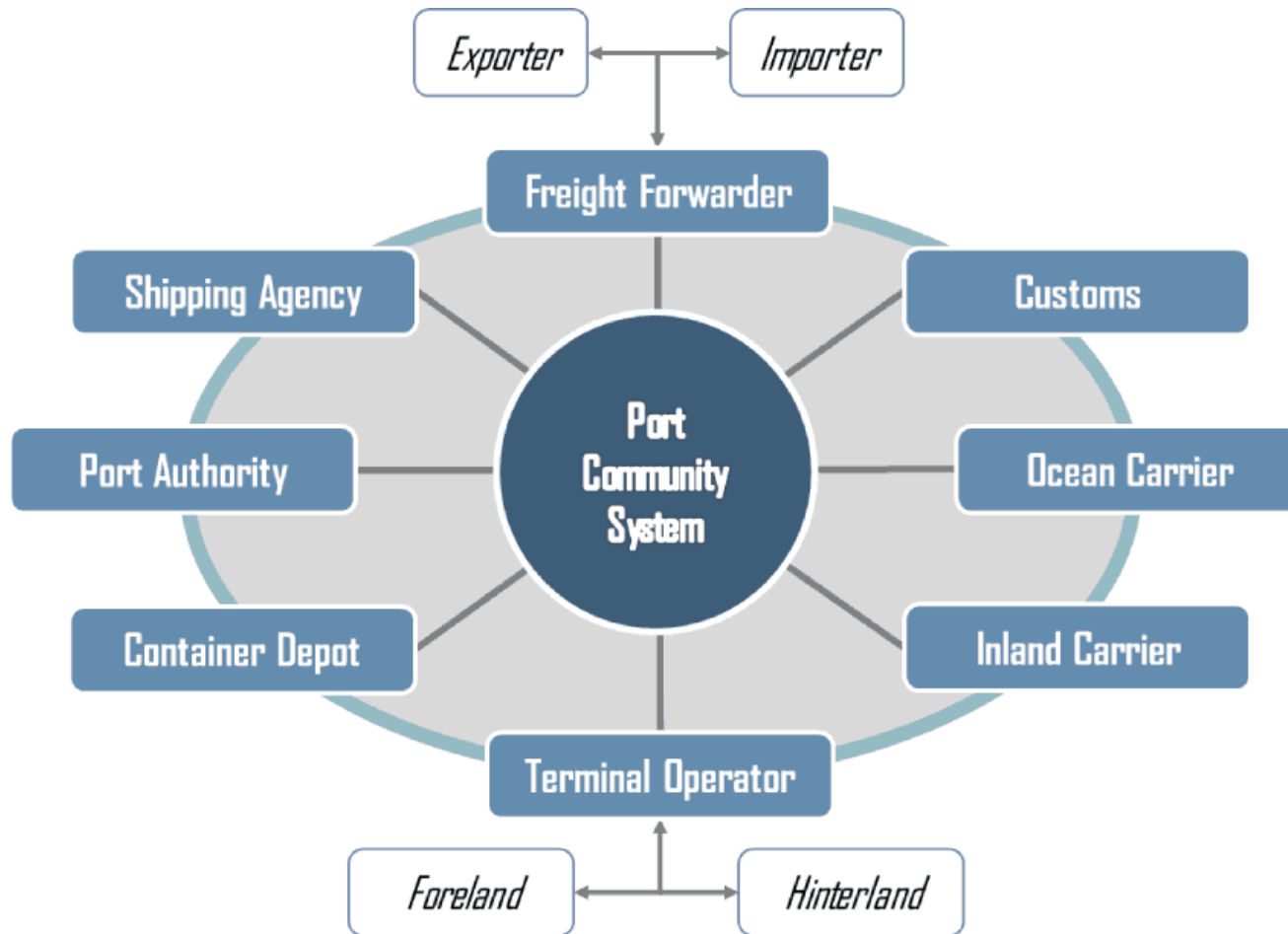
Operator

Terminal Operator(s)

Cluster Governance

- Service Efficiency
- Logistical Integration
- Infrastructure and Growth Management
- Port-City Integration

Port Community Systems



Port Solution

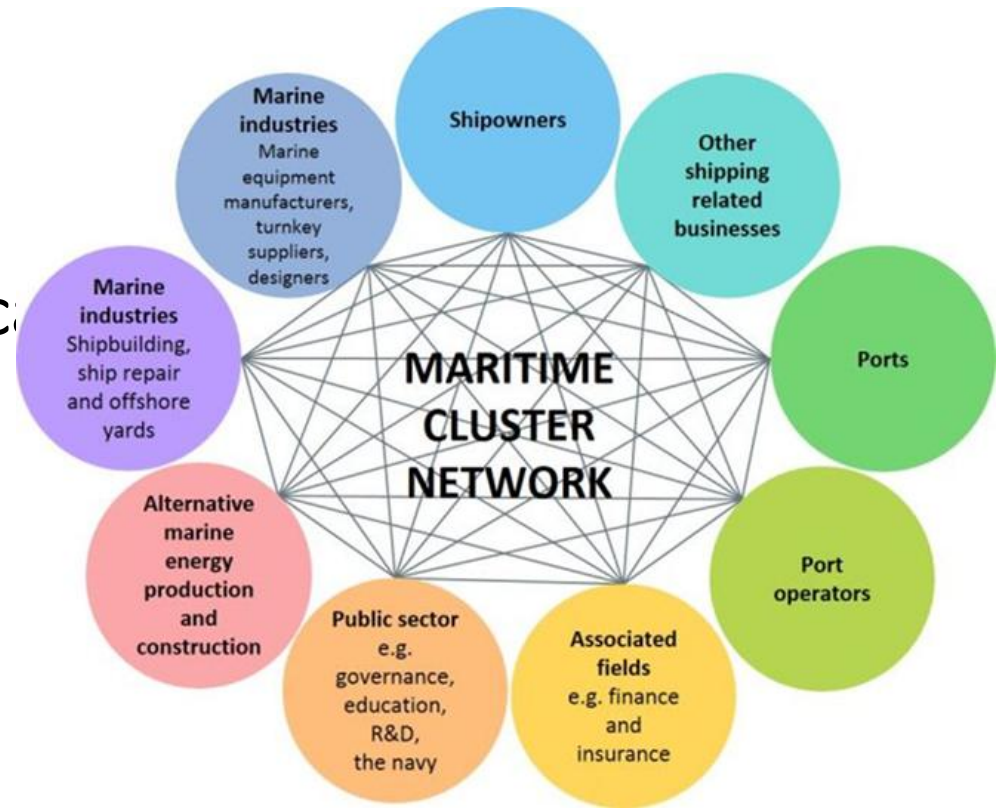
Port Operators:

Stevedoring, ship repairing and other companies render cargo handling, warehousing, towage, logistics and other port-related services.



Global outlook of Nigeria Maritime Environment I

- Nigeria boasts of vast resources to become the maritime hub for West and Central Africa:
 - Untapped marine resources and manpower
 - Appreciable industrial and maritime cluster network.



Global outlook of Nigeria Maritime Environment II

- Inadequate funding
- inadequate and decrepit port infrastructure
- Bad port access roads & connectivity
- over-dependence on road for cargo evacuation
- Port Congestion



Stranded container in Lagos ports



Apapa Gridlock (bizwatchnigeria.ng)




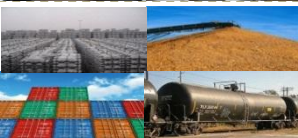


Port Congestion Looms at Apapa

Cluster Identification

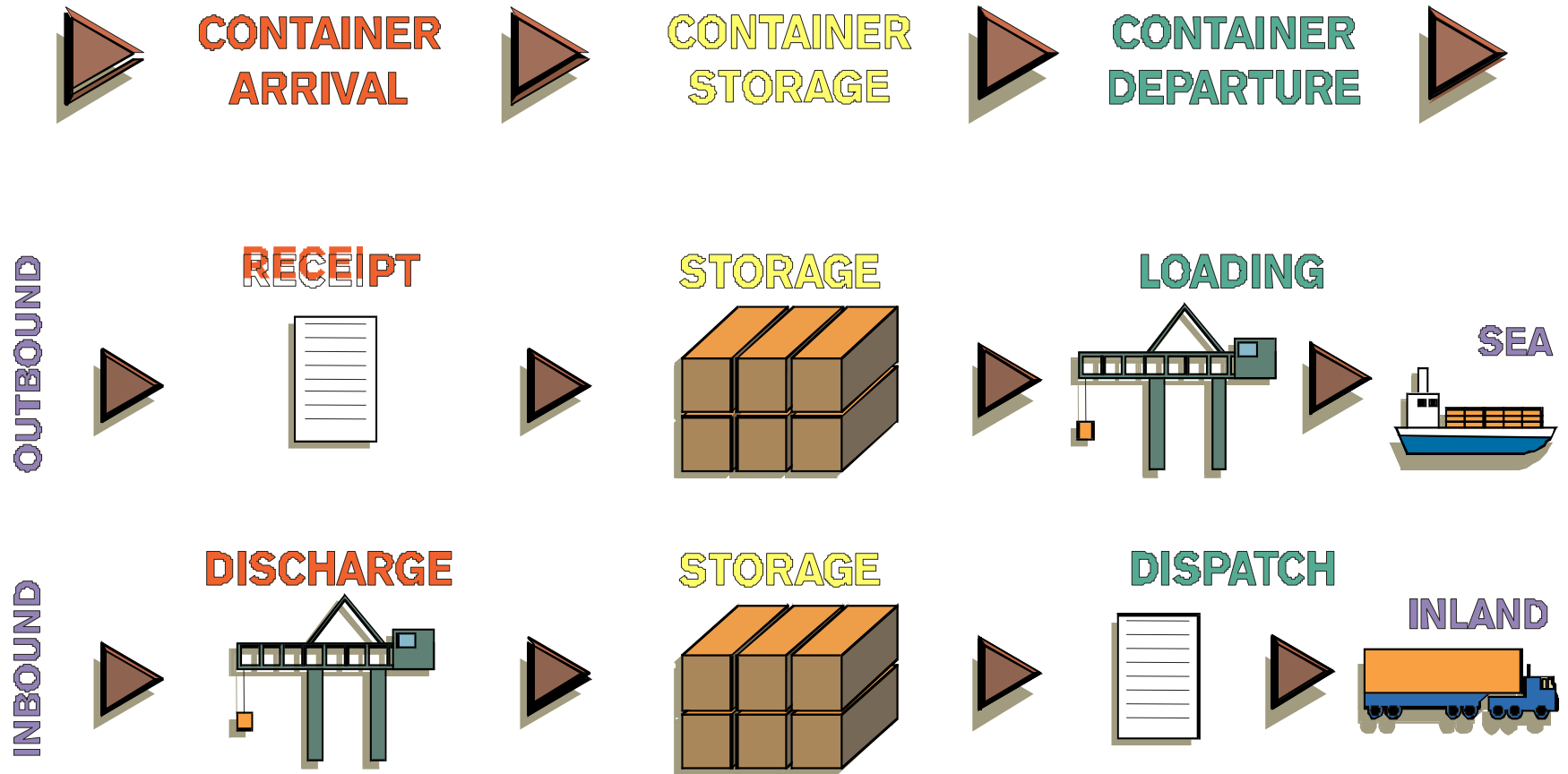
- Three types of identifiers indicating the existence of a cluster in an economic area:
 - **Volume indicator** – high representation of one economic sector in one area indicates the existence of the agglomeration-type cluster.
 - **Cooperation indicator** – the presence of professional associations and cluster initiatives in the area indicates the existence of the network-type cluster.
 - **Resource indicator** – the presence of a common denominator in the area - e.g., natural resources, infrastructure, geographical location, or research and development activities in a certain area - indicates the existence of the value chain cluster developed around this resource.



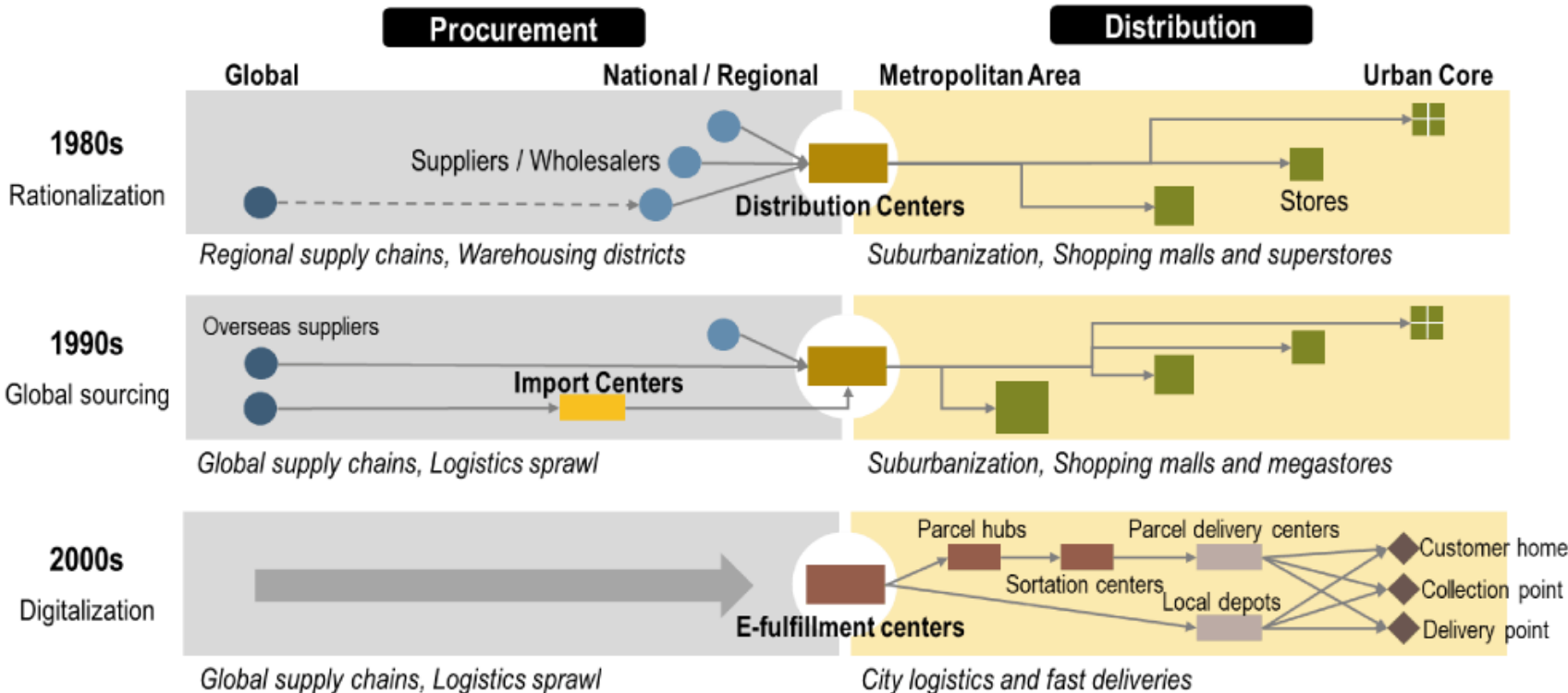
STAKEHOLDER EXPECTATIONS

<p>Shipping lines</p>		<p>Cargo volumes, Compliance with schedules, High productivity levels, Flexibility, Reduced operating costs, Market growth</p>
<p>Terminals</p>		<p>Cargo volumes, Terminal productivity, Performance of service providers, Reduced operating cost, Market growth</p>
<p>Cargo Owners</p>		<p>Compliance with dwell times and lead times, Storage, Cargo handling productivity, No cargo degradation or damage, Reduced costs</p>
<p>Stakeholders (Service providers and Suppliers)</p>		<p>Economic growth, Job creation, Access to the port industry, People development, Minimised externalities, Sustainability</p>
<p>Marine Services</p>		<p>Targeted volumes, Asset utilisation, Vessel handling productivity levels, Demand coverage, Competency, Safety, Sustainability</p>
<p>Port Authority</p>		<p>Cargo and vessel volumes, Targeted levels of capacity utilisation, High productivity levels, Quick turnaround of vessels, Smooth logistics flows, Market growth</p>

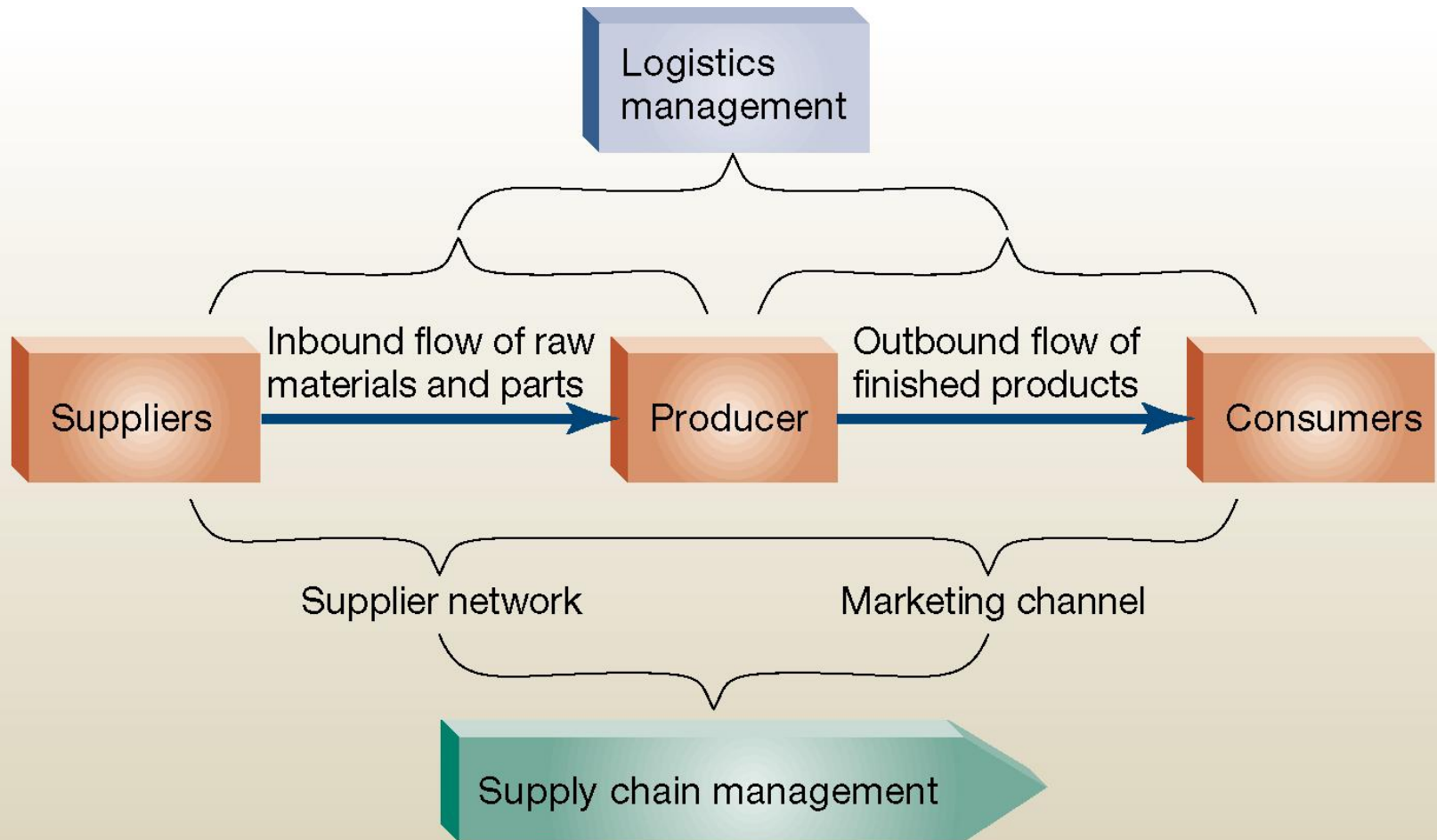
SERVICE PROVIDER



Evolution of Supply Chain Management



Relating marketing channels, logistics management, and supply chain management



The World is Changing

“In the 21st century, we will increasingly rely on the lean and agile entrepreneurship of the small, growth-oriented business— rather than the resources, scale, and market size of the large corporations – to fuel our economic growth through the creation of jobs and innovative goods and services.”

The E Generation

Who Are Entrepreneurs?

Entrepreneur- perceives new opportunities and creates and grows ventures around such opportunities through innovation”
(Dyer, Gregersen, and Christensen, 2008)

Attributes of Entrepreneurs

- Innovation – This occurs when something new is created. Entrepreneurs take an abstract idea and make it real.
- Passion – Usually E-ship is not just about money. Entrepreneurs have a passion for their ideas.
- Risk-taking – This is the ability to take calculated risks and to manage those risks.
- Team-building – Successful enterprise almost always requires partners.
- Putting the Pieces Together – Entrepreneurs must find the resources they need and put those resources together.

Entrepreneurial Talent Pool

Main types of entrepreneurial talent:

- Potential Entrepreneurs
- Current Business Owners
- Current Entrepreneurs

Talent Pool Diagram:

- Some Potential Entrepreneurs will start businesses and become Entrepreneurs. Others may decide to buy existing businesses instead and become Business Owners. Many, unfortunately, will never move from the Potential category.
- Some Business Owners may be content with their current business model and not want to change. Others will innovate with a new business model, new products and services, or even a completely new enterprise and become Entrepreneurs.
- From the community's perspective, the goal is to make the pathways to entrepreneurship easier to navigate, thereby expanding the number of people who are able to become Entrepreneurs.

Entrepreneurs, in their own words

“I have always found that my view of success has been iconoclastic; success to me is not about money or status or fame, it’s about finding a livelihood that brings me joy and self-sufficiency and a sense of contributing to the world.”

Anita Roddick, founder of The Body Shop

“We were young, but we had good advice and good ideas and lots of enthusiasm. Our success has really been based on partnerships from the very beginning.”

Bill Gates, founder of Microsoft Corporation

Take Action!

“Whatever you think that you can do or believe you can do, begin it. Action has magic, grace, and power in it.”

- Johann Wolfgang von Goethe

