

A DECADE OF CHANGE FOR THE AUSTRALIAN SEA  
TRANSPORT AND SHORE-BASED SHIPPING  
INDUSTRIES -- A NEW SPIRIT OF CO-OPERATION OR  
JUST MORE OF THE SAME?

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**ABSTRACT**

*This paper examines the catalysts, processes and some results of change in both the sea transport and shore-based shipping industries during the last decade. The paper starts by considering the catalyst for change which existed in the early 1980's and in particular discusses the poor image which both industries possessed. The process of change is explained in the context of a simple three-step model which is then compared with the actual change processes which have occurred in both the sea transport and shore-based shipping industries. As a result of this analysis, the change process for sea transport is identified as being piecemeal in nature but reasonably advanced, whilst for shore-based shipping it is clear that a detailed program of planned change has been developed but insufficient time has passed for the process to gather momentum. Changes both specific and general are identified but for the user there is little evidence to indicate that the costs and quality of service have improved. However, for the sea transport industry successful change seems likely, whilst for the shore-based shipping industry the success, or otherwise, of the change process is, as yet, unknown.*

## INTRODUCTION

This paper examines the process of change in the context of the Australian sea transport and shore-based shipping industries, firstly by considering the planning processes themselves and secondly by analysing some of the results flowing from the process of change.

Planning is a fundamental activity in any business enterprise, be it big or small, international or local, statutory corporation or private enterprise. Planning for change is particularly important because of the potential effects on all involved. However, when that change involves whole industries, the process of change becomes of interest to governments. Indeed, governments are frequently the instigators of change, this particularly being the case in small markets with few competing participants. The Australian Government has been an instigator of change in both the sea transport and shore-based shipping industries during the last decade.

"Experience has shown that for change to be successful, consensus between all parties is a pre-requisite" (Australian Maritime Industry Mission, 1985, p3). This is reinforced in the literature; for example, Bass (1970, p60-71) showed that managers who had participated in developing plans were significantly better in carrying out those plans than managers that simply had plans assigned to them. Additionally, as Dessler (1985, p45) states; "Plans are implemented by people, and so gaining the commitment, acceptance, and enthusiasm of subordinates for plans is a necessary pre-requisite to having those plans implemented".

There is no doubt that there has been significant involvement of industry by the Government in the process of developing plans for change however, the extent to which consensus planning has been able to achieve results is a matter of conjecture when the change indicators are analysed.

## CATALYST FOR CHANGE

An examination of Australia's maritime history (e.g. Bach, 1976; McKellar, 1977; Page, 1975) indicates the cyclical nature of the turmoil associated with both the sea transport and shore-based shipping industries. In the early 1980s it once again became evident that all was not well with Australia's maritime industries. Apart from suffering from a poor image other problems were identifiable: ANL was grossly under-capitalised, shipping technology was beginning to pass Australia by, ships were overmanned, waterfront productivity was poor, the strike

record both aboard ship and on the waterfront was abysmal, and both the sea transport and shore-based shipping industries were rife with unacceptable work practices. In essence, Australia was seen as a high cost sea transport provider with expensive, unstable ports, to be avoided if at all possible.

Whilst the effects of this turmoil are self-evident, in the economic sense, the almost universally bad image which was created was also of significance. As Kolasa (1969, p603) states: "The image is in the nature of a stereotype, a simple shorthand representation of reality". Whether the classic image of the sea transport and shore-based shipping industries as expensive, overpaid, strike-ridden, industrially featherbedded industries is correct is not the point; it is how the public at large and the system users in particular perceive these industries, along with the way the industries act and project themselves, plus media reporting, which create the image. Thus, not only should changes in the sea transport and shore-based shipping industries have attempted to improve their cost effectiveness but should also have set about rectifying their poor image. The public at large do not generally differentiate between problems associated with sea transport and problems associated with the shore-based shipping industry thus, both can be unfairly tarred with the same brush. Put simply, it was necessary for both the sea transport and shore-based shipping industries to simultaneously clean up their act.

The Liberal/Country Party Government of the day recognised that significant problems existed and set in train (14/07/80) with the Crawford Revitalisation of Australian Shipping inquiry, a chain of events that are still underway today. The perceived and identified problems were the catalyst and Crawford was the start of the process of change.

#### PROCESS OF CHANGE

To deal with change, there are two major approaches. The first is to react to the signs that changes are needed, making piecemeal modifications to deal with particular problems as they arise. The second is to develop a program of planned change, making significant investments of time and other resources to alter the way organisations or industries operate. In this case, planning deals with present difficulties and with anticipated problems which are not yet clearly observable.

It is postulated that the change process for the sea transport industry most closely resembles the former whilst the change process for the shore-based shipping industry most closely resembles the latter.

## A DECADE OF CHANGE IN SHIPPING

Lewin (1951) identified two major obstacles to change:

- (a) unwillingness (inability) to alter long established attitudes and behaviour;
- (b) after brief periods of trying to do things differently, individuals often attempt to return to their traditional pattern of behaviour.

In order to overcome these obstacles, Lewin (1951) proposed a three-step model of the change process. This model was elaborated by Schein (1980, p243-7) and basically involves unfreezing the present behaviour pattern, changing or developing a new behaviour pattern and then refreezing or reinforcing the new behaviour. Stoner, Collins and Yetton (1985) suggest that the Lewin-Schein model may fail because too much energy is needed to move the system to the point where change is desired or because those seeking change do not put enough energy into attempts to bring it about. If the unfreezing step is too difficult, the change effort will fail.

In the case of the sea transport industry, it is postulated that the unfreezing stage has successfully occurred whilst the development of some new behaviour patterns is observable; however, further new behaviour patterns need to be developed before it is time to refreeze. For the shore-based shipping industry, the unfreezing stage is still underway.

### THE CHANGE PROCESS IN THE SEA TRANSPORT INDUSTRY

This section considers the process of change as it directly effects the operation of sea transport. Each step of the process is briefly described in terms of its objectives, method of operation, time scale and agreed outcomes. (A synopsis of objectives appears at Appendix 1.)

#### Committee on Revitalisation of Australian Shipping

Objectives - determine steps necessary to revitalise Australian shipping

Method of Operation - Joint committee of shipowners and maritime unions with an independent chairman (Crawford).

Time Scale - 14/07/80 to 29/07/82

Outcomes - Financial incentives for shipowners who utilise new vessels with reduced manning levels i.e 27-29 Continued dialogue between industry, users and Government on matters including problems with coastal liner shipping, the use of Australian flag ships in overseas trades and promoting a better understanding of technical and policy issues

Joint Shipping Task Force

Objectives - determine contribution of shipping to the balance of payments

Method of Operation - Group comprising representatives of the Department of Trade, the Department of Transport and the Office of the Minister of Trade which held private discussions with a range of users and providers of sea transport services

Time Scale - 04/84 to 10/84

Outcomes - An expanded Australian fleet could make a limited contribution to the invisibles account of the balance of payments but a more important benefit would be enhanced economic activity. Inherent inefficiencies in land based transportation were identified. It was noted the Crawford provisions were beginning to be implemented including the formation of the Maritime Industry Council of Australia (MICA) to put an industry viewpoint to Government

Australian Maritime Industry Mission to Study Developments In Manpower and Training of Seagoing Personnel

Objectives - evaluate overseas manpower and seagoing personnel training systems

Method of Operation - Group comprising representatives of shipowners and seagoing unions led by a FAS from the Department of Transport (Eccles) which held private talks with overseas ship operators, seagoing unions, training establishments and researchers

Time Scale - 09/85 to 10/85

Outcomes - Set up an appropriate forum comprising government, owners and unions to consider and develop all aspects of the Mission's report. Use high technology vessels with better educated and trained, smaller crews to provide an efficient shipping industry.

Maritime Industry Development Committee (MIDC)

Objectives - develop new manpower and training regime for seafarers

Method of Operation - The group comprising the Australian Maritime Industry Mission.

Time Scale - 03/86 to present (with report 10/86)

Outcomes - A new manpower regime which will significantly improve crew productivity on the next generation of ships. To include reduced manning levels, i.e. 21-23, and elimination of work and social barriers in exchange for a new set of financial incentives to shipowners.

## A DECADE OF CHANGE IN SHIPPING

### Transport Industries Advisory Council (TIAC) Proposal for the Development of Australian Flag Shipping

Objectives - advise Government on appropriate financial incentives to shipowners

Method of Operation - Transport Industries Advisory Council  
Project Committee no. 17

Time Scale - 04/86 to 09/86

Outcomes - To provide financial incentives to shipowners, the Crawford provisions having become ineffective.

### Shipping Reform Task Force

Objectives - evaluate change to date and propose strategies for the future

Method Operation - Group comprising shipowners, seagoing unions, users, the ACTU and public servants under an independent chairman (Deveson)

Time Scale - 11/88 to 04/89

Outcomes - Accelerate the pace of change. A modernisation committee will oversee up-graded training programs to further reduce manning levels on MIDC vessels, i.e. less than 21-23. Dual purpose watchkeepers and mechanics will be introduced. Also fewer integrated ratings will replace existing seamen and greasers on older vessels along with fewer engineers and stewards. This is to be achieved within the time frame of the current financial incentives package to shipowners which expires in June 1992.

These six steps can be viewed as a continuum with the major thrust being improved efficiency by the use of new higher technology vessels, whose purchase and operations are aided by financial incentives to their owners, provided manning levels are reduced. The process followed indicates that changes have been made based on reactions to the signs that change is needed, in so much as piecemeal modifications have been made as particular problems have arisen. To reinforce the view that sea transport has been subjected to a reactive change process, two further investigations are pertinent.

Industry Task Force Review of Australia's Overseas Liner Shipping Legislation

Objectives - evaluate the effectiveness of legislation such as the Trade Practices Act in the context of conference shipping

Method of Operation - Group comprising shippers, seagoing unions, ship operators and academics chaired by a Government chairman from the Department of Transport (Rowland). Public submissions were received along with private discussions with users and providers of sea transport services. Additionally the Bureau of Transport Economics provided significant support and input, including a seminar in June 1986.

Time Scale - 26/09/84 to 08/86

Outcomes - Establish an Australian Shipping Act to encapsulate Australian shipping policy objectives. Other recommendations relating to unfair competition, UNCTAD Liner Code, Australian flag shipping, bi-lateralism, centralisation and pan-Australian rates, loyalty arrangements and rebating.

Industries Assistance Commission Inquiry into Coastal Shipping

Objectives - evaluate the economic efficiency of coastal shipping

Method of Operation - Formal IAC inquiry involving public submissions, public hearings and private discussions

Time Scale - 21/07/87 to 20/07/88

Outcomes - Whilst the Crawford and MIDC provisions have led to improvements in the sea transport industry, the industry as a whole (which includes the shore-based shipping industry) remains inefficient and uncompetitive relative to maritime nations with similar standards of living. If international freight rates were applied then coastal shipping rates on a wharfgate to wharfgate basis could yield savings between \$180 and \$460 million. Flow on effects could cause the gross domestic product to increase between \$250 and \$550 million per annum. Coastal shipping now only carries goods for which alternative transport modes are either not available, or are not a realistic proposition. The Navigation Act and institutional factors have prevented competitive influences from developing an efficient industry. To pursue further reform at sea without addressing reform on the waterfront would be an exercise in futility.

## A DECADE OF CHANGE IN SHIPPING

Whilst the process of change in the sea transport industry has clearly been reactive, it is pertinent to note that all the investigations have been instigated by the Government but have, in most cases, involved appropriate interest groups to ensure that both consensus and commitment to change is achieved.

In terms of the Lewin-Schein model, the unfreezing stage has successfully occurred whilst the development of some new behaviour patterns is observable. In reality, all of the steps in the change process have contributed to improving the effectiveness of the Australian sea transport industry albeit, in most cases, only slowly.

### THE CHANGE PROCESS IN THE SHORE-BASED SHIPPING INDUSTRY

This section considers the process of change as it directly effects the shore-based shipping industry. Again, each step is described in terms of its objectives, method of operation, time scale and agreed outcomes. The change process in the shore-based shipping industry started later than the sea transport industry thus, it is not so far advanced. It is therefore more difficult to be positive that the process in the shore-based shipping industry is a genuinely planned program of change although the recent Inter-State Commission (1989) report indicates that if its recommendations are accepted by Government employers and employees, that a planned process of change will occur.

#### Industry Task Force on Shore-Based Shipping Costs

Objectives - identify areas where improvement in effectiveness should occur

Method of Operation - Group of industry leaders under the chairmanship of a leading transport industry executive (Webber). The group convened working parties made up of specific interest groups to deal with the terminal/depot-land transport interface, factors influencing cargo flows and users' problems. Additionally, the Bureau of Transport Economics provided research support.

Time Scale - 04/07/84 to 06/86

Outcomes - Two distinct and virtually independent systems were identified. One in which shipping lines, container terminals and depots are bound by contractual arrangements and the other comprising importers/exporters and their relationships with carriers, customs agents and forwarders. The latter system has very little influence on the former. Specific recommendations dealt with stevedoring, container depots, shipping companies/agents, port authorities, land transport, importers/exporters, communications and performance measures. The magnitude of the recommendations caused the Task Force to propose that an industry body be formed to oversee the implementation process.



Inter-State Commission Waterfront Strategy

Objectives - reform the waterfront and improve its effectiveness

Method of Operation - Formal ISC inquiry involving public

submissions, public hearings and private discussions

Additionally, the ISC was given the task of guiding the

work of four working groups known as the Industry

Committee, Stevedoring Industry Review Committee,

Importer/Exporter Panel and the Australian Transport

Advisory Council's Standing Committee on Transport.

The composition of these groups reflected a particular

area of interest but, in general, encompassed government, industry, unions and users.

Time Scale - 11/12/86 to 03/89

Outcomes - To eliminate waterfront-related transport impediments

to Australia's trade and to achieve reliable, cost-effective

transport for exporters and importers by pursuing a

strategy which seeks to:

- achieve effective management and a well-motivated workforce
- strengthen the influence of exporters and importers
- increase industry transparency and accountability
- improve industrial relations and dispute-settlement procedures
- ensure market-oriented provision of infrastructure and services
- generally, remove anti-competitive practices
- establish a body to co-ordinate and manage the strategy.

Change within the shore-based shipping industry is not as far advanced as the sea transport industry however, it is possible to tentatively conclude that a more coherent, rather than piecemeal, approach has been taken. A detailed program of planned change has been developed and deals with both present difficulties and anticipated problems. In terms of the Lewin-Schein model, some unfreezing has occurred and some new behaviour patterns are observable.

## A DECADE OF CHANGE IN SHIPPING

### SOME RESULTS OF THE CHANGE PROCESS

#### Sea Transport

As a result of accepting the Crawford recommendations, a package of financial incentives were made available to shipowners. The 2% import duty on ships was abolished, the industry wide investment allowance was applied (until it lapsed for all industries in June 1985) and accelerated depreciation was allowed. These provisions were in force between April 1984 and December 1986; the result being 11 new vessels with crew numbers reduced to 27 to 29.

During 1984, the Joint Shipping Task Force was responsible for raising the level of debate on the contribution of Australian flag shipping to the Balance of Payments. This debate still continues with the Australian National Maritime Association (ANMA) using the argument to support its case for more Australian flag involvement in the carriage of international trade.

The Maritime Industry Mission of 1985 can best be described as the starting point of the industrial and social reforms which have occurred aboard ships. It has been suggested on a number of occasions that the purpose of the Mission was not just to find out what was going on overseas, but also to ensure that all the participants saw/heard/learned the same things so then when changes were being planned, there could be no argument about what was/was not correct. Following directly on from the Mission was the formation of the MIDC. Their work was assisted by the TIAC who put forward a proposal for new financial incentives for shipowners because the Crawford package had become ineffective. This new package provided for owners of new or second-hand ships brought onto the Australian register to be eligible for a taxable grant of 7% of the purchase price provided further manning reductions, using MIDC criteria, to 21 to 23 were achieved. This package came into force through the Ships (Capital Grants) Act in June 1987 and is to remain in force for second-hand ships until June 1990, and for new ships until June 1992. At the time of writing, there are 11 vessels committed under the MIDC regime, and it has been widely reported in the shipping press that the Department of Transport estimates this number will increase to between 27 and 45 by 1992.

The results of the IAC Inquiry into Coastal Shipping and the deliberations of the Shipping Reform Task Force are to be considered by the Government during April 1989. It seems that by June 1992 there will be further manning reductions below 21 to 23 on the MIDC ships and also manning reductions on existing older ships. Should this not be achieved, then it is probable that no further financial incentives will be negotiated and the coastal trades could be partially opened to non-Australian flag shipping.

Whilst the above indicates that change is underway, of even greater significance has been the breaking down of both social and work (demarkation) barriers aboard ship. The importance of this is not to be underestimated and much credit is due to the seagoing maritime unions.

Apart from the financial and manning level changes, legislative change is also underway. The outcome of the Review of Australia's Overseas Liner Shipping Legislation has been not to establish an Australian Shipping Act but, rather to repeal and replace with a new part, Part X of the Trade Practices Act. This strengthens the position of shippers by increasing the transparency of the operations of shipping conferences and is due to enter into force on 01/07/89 when the six month change over period commences.

#### Shore-based Shipping

The Webber inquiry identified a number of improvements and initiatives which occurred during the period of its work (July 1984 to June 1986). Specifically:

- trial vehicle booking schemes were introduced in two Melbourne terminals and one large depot
- a number of terminals adjusted their operating priorities to alleviate queuing problems
- restrictions on contracting out major repairs on terminal equipment have been relaxed in some terminals
- one terminal has introduced early morning starts to service road vehicles
- an early warning system on container availability was introduced by the MSB in Sydney ports
- at least one major shipping agency has taken steps to upgrade its communication with clients using modern electronic technology
- it is understood that the activities of the Task Force have encouraged consideration of a number of matters within the stevedoring industry earlier than might otherwise have occurred (Industry Task Force on Shore-based Shipping Costs, 1986, p2)

## A DECADE OF CHANGE IN SHIPPING

Whilst these changes were no doubt important they did not get to the real heart of the problems within the shore-based shipping industry, consequently, it is the Inter-State Commission's strategy which holds the greatest promise for the future. This strategy must be made to work because, unlike sea transport, there are few, if any, viable alternatives to users.

### General

The body of knowledge about Australia's sea transport and shore-based shipping industries has increased significantly during the decade. This is evidenced by the quantity and quality of publications emanating from the Bureau of Transport Economics, inquiries and inquiry submissions, consultants, academics, ANMA, etc. As a result of this activity, the level of debate has also improved as evidenced by the plethora of seminars and activities such as this ATRF. This has led to a better understanding of the issues and problems associated with both the sea transport and shore-based shipping industries. In short, governments, employers, unions, employees and users are all better informed.

Aboard ship, social barriers have been broken down by the provision of common mess facilities and common initial training programs instigated by the MIDC and Australian Maritime College through their Integrated Rating trainee scheme. This program has also led to the breaking down of shipboard demarcation barriers. At the same time, the number of seagoing unions has reduced from seven to three, and is likely to reduce to two in the near future. Additionally, ANMA (1987, p68) reports that between 1982 and 1986 the percentage of ship days lost through crew disputes fell from 4.1% to 0.2%.

The formation of ANMA is also of significance. ANMA was formed in 1986 with the aim of fostering the expansion of a dynamic and competitive Australian Merchant marine. For the first time, Australian flag operators have an organisation of their own which puts their point of view and pursues their interests in a unified manner. Because membership is restricted to Australian flag operators, the Australian voice is no longer submerged as it was when the Australian Chamber of Shipping was the only body which represented ship operators' views. ANMA has moved quickly and professionally to establish itself as a genuine force in the Australian shipping scene. Its attempts to establish a positive image for Australian sea transport are a vital part of the change process.

On the waterfront, the number of WWF members employed has fallen from about 8400 in 1980/81 to about 5300 in 1987/88 however, the general consensus is that this number is still too high. The level of disputation on the waterfront has also fallen from 347.5 x 103 hours lost in 1980/81 to 127 x 103 hours lost in 1986/87 (DoTC, various). Additionally, in 1988 waterside workers in Mackay and Stanely formed joint venture stevedoring companies with the local port authority and since then joint ventures have been started or are being discussed at Geelong, Esperance, Albany, Geraldton and Darwin. These moves are seen as one means of moving towards the goal of bringing about improved services to shippers.

Over the years, the waterfront has been subjected to considerable criticism of its cargo handling performance. Much of this criticism is valid but founded on generalities. Accordingly, the recent ICHCA (1988) research project on port performance indicators has provided a welcome base from which valid comparisons of container handling performance can be made. For example, the project found that overseas terminals handled an average of 25.93 TEU/crane hour whilst Australian terminals handled an average of 13.34 TEU/crane hour, with the Melbourne terminals being considerably slower than their Sydney counterparts. This data indicates the magnitude of the task ahead for the shore-based shipping industry.

These changes can best be described as symptoms of the process of change as, ultimately, the success or otherwise of change must be reflected in the cost and quality of service to the user.

#### CONCLUSION

The process of change is well underway in the sea transport industry but only just commencing in the shore-based shipping industry. Part of the change process entails overcoming resistance to change, and Kotter and Schlesinger (1979, p108) suggest six mechanisms, namely:

- education and communication
- participation and involvement
- facilitation and support
- negotiation and agreement
- manipulation and co-optation
- explicit and implicit coercion

It is possible to see all of these mechanisms at play in the change processes associated with both the sea transport and shore-based shipping industries.

## A DECADE OF CHANGE IN SHIPPING

Whilst change is measurable, e.g. manpower reductions, cargo throughputs, etc. it is ultimately the cost and quality of service to the user which must be the measure of success. It is still too early to indicate whether or not customer service has improved however, some impressive targets exist. The Industries Assistance Commission (1988c, pXXV) points to possible savings of between \$180 and \$460 million for coastal sea transport, on a wharfgate to wharfgate basis, if internationally ruling freight rates were used whilst a recent report commissioned by the Business Council of Australia and others (1989, pV) indicates savings of \$850 million through cheaper port and waterfront costs, \$200 million through cheaper coastal and trans-Tasman shipping, \$300 million through cheaper international liner shipping, and \$700 million through cheaper land transport of bulk commodities may be possible.

For the sea transport industry, the path ahead is reasonably clear: accelerate the pace of change or suffer the consequences in 1992 when the financial incentives package expires. However, because unfreezing has occurred and many new desired behaviour patterns are already in place, present indications are that success is the most likely outcome. For the shore-based shipping industry, the strategy is also clear however, because the process of significant change has only just commenced, the major problem will be to totally unfreeze attitudes in the industry before the new planned behaviour patterns can be established. It is likely that these changes will be as dramatic as the technological changes which effected ports during the 1970s (Lewarn, 1985).

For both industries, change will alter their structure, alter the technology they use and alter the people involved (Stoner et al, 1985 p457-461) however, as indicated by the IAC (1988c, pXXVI) to pursue further reform at sea without addressing reform on the waterfront would be an exercise in futility. The sub-systems must function as one for the users to gain maximum benefits.

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## A DECADE OF CHANGE IN SHIPPING

### APPENDIX 1 - Synopsis of Objectives of Major Reviews/Inquiries

#### COMMITTEE ON REVITALISATION OF AUSTRALIAN SHIPPING

"The aim is to produce an efficient Australian shipping industry, which can compete commercially with both land-based domestic transport and international shipowners. This is expected to be achieved by fostering agreement between the shipowners and unions," Mr Hunt said.

"The Committees will be free to choose the topics to be studied and to set up their own targets"

"The Committees will identify the problems facing the industry and then propose solutions, primarily of a 'self-help' nature, towards making Australia a maritime nation".

source: Crawford, 1982, p41

#### JOINT SHIPPING TASK FORCE

Assess the effect of freight charges on the balance of payments and the control of shipping upon export negotiations by way of:

- (i) establishing the factual situation
- (ii) reviewing the progress that has occurred with implementation of the Crawford Report, and
- (iii) considering initiatives that might be taken to achieve improvements in Australia's balance of payments earnings employment and income in this area of our services trade

source: Joint Shipping Task Force, 1984, p1

#### AUSTRALIAN MARITIME INDUSTRY MISSION TO STUDY DEVELOPMENTS IN MANPOWER AND TRAINING OF SEAGOING PERSONNEL

Examine the needs of the Maritime Industry in the 1990's against developments which have taken place, or are intended, in maritime nations with similar standards of living to Australia, to analyse the processes of implementation and to interpret their relevance to Australian circumstances.

source: Australian Maritime Industry Mission, 1985, p3

# MARITIME INDUSTRY DEVELOPMENT COMMITTEE

In accordance with a recommendation of the Australian Maritime Industry Mission the Committee is to provide a consultative forum between Government, shipowners and unions which will develop and implement the conclusions and findings of the Mission report. The Committee's principle objective should be new manpower policies and practices appropriate to modern ship technology

source: Maritime Industry Development Committee, 1986, p24

# TRANSPORT INDUSTRIES ADVISORY COUNCIL

The Transport Industry Advisory Council has been giving consideration to the efficiency and potential for development of the Australian Flag shipping fleet. It has found this to be a subject confused to an unusual degree by preconceptions, and misunderstandings about the determinants of competitiveness in shipping activities. Council has reached the conclusion that objective assessment of the industry's position indicates that action is required at both Government and industry levels.

source: Transport Industry Advisory Council, 1986, in  
Maritime Industry Development Committee, 1986, p28

# SHIPPING REFORM TASK FORCE

- (a) Enable the Australian industry to provide dynamic and responsive shipping and related services tailored to match client needs;
- (b) Put Australian shipowners on a commercially competitive basis with foreign shipowners in the areas of shipping technology, financing, management and operations;
- (c) Further increase the operating efficiency of existing and new Australian ships;
- (d) Further develop training strategies and career structures for Australian seafarers; and
- (e) Deal with the impact of change on future manpower requirements, including voluntary early retirement or redundancy packages for seafarers.

source: Willis R, 1988, p2

## A DECADE OF CHANGE IN SHIPPING

### INDUSTRY TASK FORCE REVIEW OF AUSTRALIA'S OVERSEAS LINER SHIPPING LEGISLATION

1. Whether existing legislation remains appropriate, and if not, the changes required for effective regulation of the commercial aspects of general cargo shipping
2. Australia's requirement for stable, adequate and efficient shipping services in its international commerce.
3. Commercial practices in Australia's liner shipping services, including such matters as loyalty agreements and rebating
4. The role of national flag shipping in the carriage of Australia's international trade.
5. Relevant international developments influencing the economics and structure of international general cargo shipping services.
6. The UN Convention on a Code of Conduct for Liner Conferences and other multilateral regulatory developments.
7. Australia's bilateral and regional shipping relationships.
8. Such other matters as may be referred by the Minister for Transport.

source: Industry Task Force Review of Australia's Overseas Liner Shipping Legislation, 1986, p8-9

### INDUSTRIES ASSISTANCE COMMISSION INQUIRY INTO COASTAL SHIPPING

- (a) The economic efficiency of coastal shipping and the cost structures of operating vessels currently engaged in or capable of being used in the coastal trades, taking into account developments currently taking place in the industry
- (b) Competitive forces within and impacting on the coastal shipping industry
- (c) Freight charges in coastal shipping and the extent to which these might vary as a result of improved efficiency in the industry

SEAS LINER

- (d) The impact of Government assistance and regulation on coastal shipping operations and on costs to using industries
- (e) Other factors which impact on the efficiency of coastal shipping or impair its competitiveness
- (f) The linkages between these industries and growth and employment elsewhere in the Australian economy.

source: Industries Assistance Commission, 1988c, p154-5

INDUSTRY TASK FORCE ON SHORE-BASED SHIPPING COSTS

- Examine the overall efficiency of the movement of cargo between point of despatch/receipt and shiploading/unloading
- Identify in consultation with the industry those factors which inhibit maximum operational efficiency of the total system
- Determine practical measures which would increase operational efficiency and lower the cost of land-based elements of the movement of cargo by sea

source: Industry Task Force on Shore-based Shipping Costs, 1986, p5-6

REVIEW OF THE SHORE-BASED SHIPPING INDUSTRY

- (a) develop a comprehensive data and information base to enable the performance of all sectors of the industry dealing with the handling, storage and movement of cargo to be effectively and regularly assessed,
- (b) seek submissions from importer/exporter interests about the impact of the industry on their competitiveness.

source: Inter-State Commission, 1987, p93-98

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